



Standard Operating Procedure (SOP)

SOP-OPS-009

SOP for Retrieving Electronically - F

Version 1.1

Document Overview

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Objective of the SOP – Retrieving Electronically - F

This service need to executed with caution and precision till the end, as any flaw in this activity will emerge only during the next retrieval of the same file. More so for the client this SOP when followed will smoothen all other process internally and clear internal audit parameters.

The objective is to ensure that

1. The records / files / documents that have been retrieved are only being collected for refileing
2. The records / files / documents that have been retrieved are being refiled in its original location



Scope of the SOP – Retrieving Electronically - F

The following is the scope for the SoP – Retrieving Electronically - F

1. Begins with the receipt of email from the client to refile the retrieved records.
2. Extends till the Verification of RPL.

Exclusions

1. Option for the client not informing the details of the files to be refiled.
2. Other department records clubbed with another department's refile request.
3. Retrieval request of the returned request before refiling activity is complete.
4. Carton level retrieval returned at file level.

Notwithstanding any of the above exclusions, records on receipt at the staging area of Kayman Records Centre, will follow every step of this SOP without any modifications / alterations.



Retrieving Electronically - F – Procedure



Detailed Instructions

Retrieving Electronically - F

1. Client to place request through mail.
2. Validate Client ID / email in K-Vault.
3. Create Work Order for Electronic Retrieval – File.
4. Confirmation mail to customer denoting their request is under process.
5. Create pick list for the requested file & retrieve the Files.
6. Scan all documents in the file.
7. Replace the documents in the file and file in the carton, and the carton in the slot.
8. Create a multi pdf for each file.
9. Send the pdf file to the client.



List of Glossary

Terms	Full Title / Description
Carton	Corrugated boxes / containers - Kayman's standard record management boxes
Challan	Receipt for confirmation
Barcode	Labels with bar codes, readable by scanners for accuracy
Indexing	Capturing details from a particular file in a specified format
Facility	Kayman's records storage center
Allocation	Choosing the slot in which the cartos are to be placed.
Validation	Re-confirmation of a previous activity.
K-Vault	Kayman Vaults' Records Management Software.



1800-572-5262

About Kayman Vaults

Kayman Vaults offer offsite record management services - specializing in document lifecycle management services - that caters to records storage, scanning, electronic document management, and shredding needs. With over 40 years of collective experience in records management, data management and document management, Kayman Vaults is the trusted name for offsite records management.

Read More

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