KAYMAN VAULTS

Standard Operating Procedure (SOP)

SOP-OPS-011
SOP for Inserting File

Version 1.1

Document Overview

Author: Ram Ramajayam

Accepted by: Aravinth Manoharan

First Created: 09-Feb-2020

Last Modified:19th March 2021

www.kaymanvaults.com

Objective of the SOP – Inserting File

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 refiling

2. The records / files / documents that have been retrieved are being refiled in its original location

Scope of the SOP – Inserting File

The following is the scope for the SoP – Inserting File

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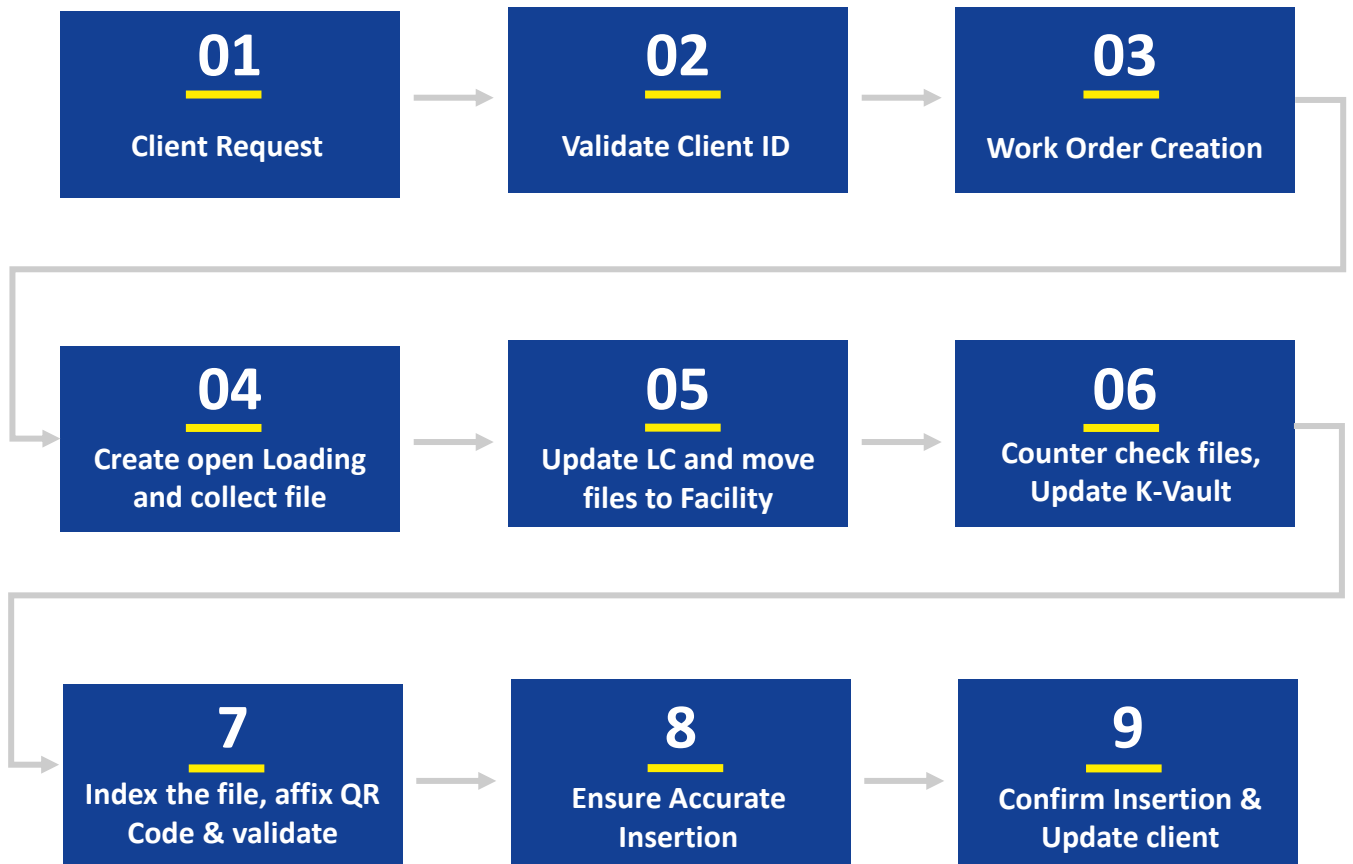2. Extends till the Verification of RPL.

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.

KAYMAN VAULTS

Inserting File – Procedure

01	02	03
Client Request	**Validate Client ID**	**Work Order Creation**

04	05	06
Create open Loading and collect file	**Update LC and move files to Facility**	**Counter check files, Update K-Vault**

7	8	9
Index the file, affix QR Code & validate	**Ensure Accurate Insertion**	**Confirm Insertion & Update client**

KAYMAN VAULTS

Detailed Instructions

Inserting File

1. Client to place request through mail.

2. Validate Client ID / email in K-Vault.

3. Create Work Order for Inserting File

4. Create open Loading and collect the file with count.

5. Update LC, take acknowledgement from Client and move files to the facility.

6. Counter check files received and update in K-Vault and close LC.

7. Index the file, affix QR Code, validate in K-Vault and add to Insertion List and print Insertion List.

8. Retrieve carton, place the file, add to carton, scan in K-Vault to ensure accurate insertion.

9. Confirm insertion, close work order, update client.

KAYMAN VAULTS

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.

KAYMAN VAULTS

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
www.kaymanvaults.com
info@kaymanvaults.com | presales@kaymanvaults.com

Disclaimer