

# FORTUNE 500 FINANCIAL SERVICES COMPANY IMPROVES INFORMATION MANAGEMENT

## CHALLENGE:

This company needed a centralized solution to track the location and lifecycle of their growing volume of records, both on and offsite.

## SOLUTION:

Infolinx configured a solution to accommodate complex retention schedule and offsite storage management.

## BENEFITS:

- Manage 3,000+ department/document-specific records schedules
- Manage processes of 300 departments
- Track records from 3rd party offsite storage vendor

## Infolinx Built a Centralized, Secure Platform for Complex Records Management Needs

Recognized by Fortune as one of the “World’s Most Admired” insurance companies, a Fortune 500 financial services company needed a software solution built to meet their specific records scheduling system and offsite storage needs.

Looking for a permanent solution, not just a temporary fix, Infolinx was selected to accommodate the lifecycle management of the growing volume of records as well as the classification needs of their department-centric file plan.

Another challenge was that record custodians from different departments were keeping files for extended periods or not using the warehouse at all and instead kept various records in their departments.

Though this company did have a corporate retention schedule, separate departments could tweak this schedule to fit their needs. With approximately 170,000 boxes, Infolinx had to design a way for them to not only track boxes but to also allow individual departments control on how those boxes of records are processed.

**3,000**

Records Schedules

**300**

Departments

**170,000**

# of boxes tracked

"The client required that the C.H.Coakley/ ASI operating system be an extension of their Infolinx enterprise content operating system. I'm pleased to say, through our collaborative efforts, we delivered."

**-CH COAKLEY  
PRESIDENT/  
CEO MIKE COAKLEY**

After consulting with the client, Infolinx was able to design a customized information management solution that could manage the 3,000+ department-and-document specific record schedules.

With Infolinx, the client can now easily classify their records according to their established file plan, covering 11 main processes and 60 sub-processes. By translating their everyday business practices into a functional software, Infolinx was able to create a solution that was more intuitive and useful for their users.

## Added Integration Enabled Transition to New Offsite Storage Vendor

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After five years, the client decided to move their records from their own onsite storage facility to third-party offsite storage facility C.H Coakley, which uses Andrews VCK-SQL as its records center software.

Understanding the need for records management continuity, Infolinx built an integration with Andrews Software. By adopting a new dual barcode system, the client was able to retain their current process for tracking boxes of records at the new offsite facility without disruption. This allowed the client to manage the entire lifecycle of corporate records from the Infolinx application interface, regardless of location.