



## **THE CASPER CORPORATION**

*A SYSTEC COMPANY*

### **PBS – CASE STUDY**

### **Major Automotive Supplier Corporate Tax Department**



### **CHALLENGE:**

In anticipation of their move from one building to another on the main campus of a major automotive supplier, the tax department took a pro-active approach to this challenge to look at the way they managed one of their greatest assets, their tax records. The opportunity became..... how could they turn a disruptive move to their advantage and capitalize on this relocation to; inventory, reorganize, standardize, and improve their filing system?

### **SOLUTION:**

The Casper Corporation team was able to provide total project management including consulting services, supplies, equipment, file relocation, and the creation of a centralized file system for the entire department within a high-density Spacesaver System. The first priority was to create a database that would identify and capture the pertinent data necessary to identify the several classifications of tax documents. This database became the foundation used to create and design an alpha indexing method to be used for each of the seven categories of records. After relocating the existing files to the new facility, they were converted to a side-tab folder design with a color-coded label that identified the contents of each folder. To meet the on-going filing needs, software was provided to allow the department to continue to create color-coded labels on-site. In preparation for further development of their records management efforts, a barcode was included on each label and will serve as the starting point for the file tracking and retention component that will complete their records management policy.

When asked ....what has been the greatest benefit of the new file system? Patti replied “because of the organization of files it is much easier to find what you need. We are able to find missing files because now we have all of the files in a database. The new files take up much less space.”