



## Organization and Control for 30 Years of Electronic Documents

### Revitalizing a department's information management

Like many legal departments today, Valora's longtime client, a Fortune 50 multinational consumer products enterprise, had reached the breaking point in trying to track and manage several million electronic documents that had accumulated over the course of the last 30 years.

Seeking to streamline their work processes, including easy, on-demand search and retrieval of information, the team set out on an ambitious effort to create and populate a robust and suitably-featured document organization system that took advantage of rich metadata, organized file access, and up-to-date tools for presentation and search.

Taking full advantage of Valora's PowerHouse™ and BlackCat™ software platforms, the client soon had more than a dozen fields of rich metadata for each document, with highly relevant tags such as Information Custodian, Primary Location State, Brand Names, and Government Agencies.

Armed with PowerHouse's deep and thorough tagging, Valora implemented a complex file disposition Ruleset to AutoClassify each file into its proper folder location inside the more than 400-node folder taxonomy. Furthermore, PowerHouse created an appropriate and suitable file name for each file "promoted" to the new repository. Finally, all files were presented up to users in a rich, multi-faceted interface that yielded sophisticated multi-parameter drill-downs and cross-correlated reporting, in addition to enhanced search.

As a result of the AutoClassification effort, approximately 20% of client files were removed as "ROT<sup>1</sup>," 60% of the files promoted to the System of Record, and the remaining 20% of files moved to another file storage area. Ultimately, close to a TB of departmental data was automatically tagged, classified, migrated and presented, with a full and robust System of Record for ongoing use for all existing and future content created.

Today, the client utilizes the PowerHouse rules to classify files for several other departments and intends to continue a rules refresh effort with Valora every year. Per one of the group's Research Coordinators, "Finding content and managing department requests has gone from being a nightmare to a breeze."

#### PowerHouse AutoNaming Capabilities

One interesting and powerful requirement for this effort was for PowerHouse to create an appropriate and suitable file name for each file present. In other words, it was PowerHouse's job to *replace the existing filename* (which might have been something as simple as **1234doc.docx**) with a consistent, structured file name, incorporating the rich metadata appropriately (such as **Q4 Sales Report \_04Jun2015\_Smith, J.**)

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<sup>1</sup> ROT is an industry acronym for Redundant, Obsolute or Trivial/Trash file content.