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PAPER to PIXELS: Managing Hybrid Documents

By Lisa DiCarlo Lee

It's no secret that companies of all sizes in all industries are **creating and storing more documents**, in more formats, than ever before, driven partly by regulatory and compliance pressures.

IN ORDER TO STREAMLINE THE PROCESS OF STORING AND ACCESSING DOCUMENTS, many organizations now digitize their files. The benefits of e-documents include improved control and compliance, quicker access to information and greater processing efficiencies that drive cost savings.

Yet even as documents go digital, most companies maintain paper records of these same documents. This hybrid creates a costly, inefficient mish-mash of digital and paper documents located on site or off, and often managed by a myriad of third-party document management providers.

The bottom line is this: companies large and small, public and private need fast and reliable access to their active and inactive documents, regardless of their location or format. For larger organizations, document management can be a tangled web of print and digital documents located in various locations managed by internal and external staff. This is not the desired scenario when needing to find a document, and fast.

How do you manage paper documents stretching back years while building and managing a digital document storage infrastructure for the future?

Providers with history and expertise in both paper and digital information management are best positioned to help organizations make the transition. There is extraordinary value in outsourcing the management of the complete information lifecycle in this hybrid world. Indeed, in this economic climate most organizations need to spend time and resources on their core competencies, not scanning documents and managing file rooms.

"We offer customers a true end-to-end solution: we can manage the physical document, convert it and then put it into our hosted archive to provide electronic access," says Chris Churchill, vice president of document management solutions at Iron Mountain, a company who has led the way in merging physical and digital information management.

Rather than CIOs taking the risk and incurring the expense of outsourcing document scanning to one company, archival storage to another, active storage to another and document transportation to yet another company, CIOs can and should look to work with fewer vendors who can provide management for the entire lifecycle. Consider full-service document or information management services companies to provide not only storage and quick retrieval of paper and e-documents but conversion from

BOTTOM LINE

Most companies maintain paper records alongside their growing gigabytes of data. But how do you manage paper documents stretching back years while building and managing a digital document storage infrastructure for the future? Iron Mountain provides a solution.

paper to digital.

Taking this broader view of information management to oversee the entire lifecycle of a document with an integrated document management solution, managed by a single vendor, helps bridge the divide between paper and digital documents while cutting costs and reducing risk.

Intelligent Scanning/Conversion. When organizations digitize documents internally, they're often tempted to scan each and every document, which is expensive and usually unnecessary. Most archived documents are not time sensitive and will never even be accessed. Further, it's frequently the case that only a portion of a document needs to be converted to digital format. For example, perhaps only 10 percent of a mortgage document is unique and needs to be stored and available for retrieval while 90 percent of the document is boilerplate contract information. Knowing what to scan is an important step in streamlining the process. Customers can save 75% percent or more by scanning *only what they need, only when they need it.*

Image-on-Demand. For those paper documents with low retrieval needs, Image-on-Demand service delivers as needed. The documents are retrieved from an archive, scanned and delivered to users either via email, direct upload or secure hosted archive.

Hosted Repository. For many companies, there is little value in building and supporting an in-house image repository. A hosted archive such as Iron Mountain's Digital Record Center® for Images, provides users with secure access to their archive via a Web browser, all on a pay-as-you-go basis, for under \$1,000 a month. Alternatively, the hosted archive can work within customers' existing Enterprise Content Management (ECM) systems to provide access to electronic documents via the existing solution, or documents can be directly uploaded into the ECM system.

Managing Active Physical and Virtual File Rooms. If your business process is now electronic, why are you taking up expensive real-estate and distracting from your core focus by managing file rooms? You can instead outsource your active files to professional records managers in a purpose-built facility, receiving secure and immediate access to documents electronically.

Security. A tight chain of custody for documents means far less risk that data will be lost or stolen. Consider a



solution that protects documents in transit with locking mechanisms, vehicle alarms with driver proximity controls, dual-ignition immobilizers and in-motion security detection. And a real-time audit trail to document transactions as documents are routed through the system.

Further, information management services companies that work with a broad range of enterprise content management (ECM) solutions can work with customers to implement the technology that best suits their needs, rather than promote a one-size-fits-all “solution.”

“We’re solutions agnostic,” says Churchill. “We’re not a technology company in the sense that we’re building a complex ECM system. We operate as part of the ecosystem and with other vendors’ systems. And our goal is to recommend and select the appropriate solutions – not just the solutions we offer.”

Business Benefits to Outsourced Document Management

In addition to the cost benefits of outsourcing document management (which can be considerable), there are other business benefits worth noting.

Consider **document destruction**. This is important from an efficiency and cost perspective. Why should a company pay to keep documents that are no longer needed? One example is a mortgage. When a mortgage has been paid off, the document can be transferred to archival storage and assigned a destruction date consistent with banking rules.

“We offer customers a true lifecycle solution: we can manage the physical document, convert it and then put it into our hosted archive to provide electronic access,” says Chris Churchill, vice president of document management solutions at Iron Mountain.

This helps content owners manage customer and other documents more effectively because they’re not bogged down with unnecessary paper.

Other benefits of outsourcing the entire document lifecycle include:

- reduction of paper storage costs
- no capital investment in scanning technology
- better quality scanning
- reduction in an error-prone manual process
- reduction of lost documents
- quick online access to documents previously available only on paper, microfilm or microfiche
- better control over documents and business process

“CIOs are under more pressure than ever to not just reduce costs, but to make the most of their data and IT investments,” says Churchill. “A trusted partner like Iron Mountain can manage your data lifecycle, freeing up your IT resources to focus on its role helping the business ride out the economic downturn.”

Major industries like healthcare will likely be at the forefront of outsourcing the management of their paper and digital information. A move has been under way for several years to digitize health records, a move that got a bigger push early in 2009 when the U.S. government, as part of the \$787 billion American Recovery and Reinvestment Act (a.k.a. the economic stimulus plan), said it plans to provide incentives to physicians to adopt electronic health records. So committed is the government to promoting e-health that it will actually reduce Medicare payments to doctors who do not use electronic records.

“But that’s just one component,” says Churchill. “As more and more organizations convert physical documents to digital records, the pressure to manage, store, protect and use that data will only grow across the organization. That’s where Iron Mountain can really help.”

In a distressed economic climate, at least two things are true: one is that information is power. Document Management Solutions help provide businesses with information they need, to the people that need it, when they need it, to make the best decisions. Second, companies can’t afford to waste precious internal resources on functions that don’t sustain or grow the business.

Outsourcing the management of both inactive and active documents, in particular the transition from paper to digital, helps companies streamline the business process. ▲

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