

Bylined Article for e-Document News

Application-minded Document Archiving

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Most companies use some type of an enterprise content management system (ECM) as a catchall for archiving documents. But in today's fast-paced world, it is quickly becoming a solution that is cumbersome and difficult when it comes to accessing those documents. Moving from an ECM "one-size-fits-all" archival system to one that is more customized and application-driven may take some rethinking. But it is thinking time well spent.

The benefits of being application-minded

In most cases, a typical ECM system lives in an IT environment and does not take into account the job of a marketing department—to drive change. (Think TransPromo, think color.) The result of these shifts in demand is that industries must now respond to the changes. In most companies, however, it is hard to get the IT department to abandon the current infrastructure for something new. Most follow the old cliché "if it isn't broken, don't fix it." Going through a complete conversion can be daunting when it comes to both process and budget. But while change may be set aside in the IT department in favor of tried and true, old ways of doing things never stay long in the marketing department. And as with other trends before us, marketing is now driving the need to streamline document access sooner rather than later. You might as well get ready.

Next steps

So what do you need to look at if you are ready to move from an ECM archival system to a more customized, application-minded one? When it comes to change of any kind, you should first look long-term. For example, today your print operation may be outputting PostScript for statements but in the future, AFP might drive your print output. Five years ago, access to documents used to be for internal use so an ECM made perfect sense. Today, immediate accessibility is demanded by both the internal user and the outside world. First and foremost, when you start to shop for application-minded archive/retrieval software, it is important to select a product that is flexible and scalable. The need for a solution which can handle various data types comes into play when you launch the application from your desktop. This allows you the flexibility to use one viewer to view and distribute your documents on demand.

Secondly, with internal and external accessibility of documents comes the need for multiple levels of security. Letting the outside world view when it comes to document information is part of doing business today. But it also drives a high priority need to determine who will have access to certain documents. Rules should be determined for outside users and every level of internal employee to make sure anyone viewing a document is authorized and authenticated to do so. Therefore, the archival/retrieval software you choose should be robust enough to support every parameter.

Finally, let's face it, the Web is here to stay. And with that reality comes the fact that people do not want to wait for things to come in the mail, or if they do receive the document via USPS, they want information at their fingertips, now. This means your archival/retrieval software has to be smart enough to find the information efficiently and effectively, whether it's 7 minutes or 7 years old. In addition, the document must be a true representation of the mailed piece. True fidelity of the document is not only a compliance requirement, it may affect the trust of your end user customer. If a customer viewing the document sees anything different, it runs the risk of being perceived as altered and your company runs the risk of the dissatisfaction of a wary customer.

Looking forward

Changes in how we create, produce, and archive documents is part of business as usual today. When we make any adjustments to our processes to respond to those changes, it is important to look five years back and five years forward. Within that timeframe you will find a huge window of both wisdom and opportunity to keep your company ahead of the demand.

[This article is the second in a three-part series by Terry Wiczorek, the first being "Taming the Compliance Dragon." See part three for tips on moving forward with the changes needed to become more efficient in compliance, archiving, and storage.]

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