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Terry Wieczorek, Scott Bannor, 2010 EDP/EDA/M-EDP

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Tips for Developing a Secure, Flexible, and Efficient Archive and Retrieval System - by Terry Wieczorek

The greatest benefit of today's business documents is their fluidity and adaptability. The user creates one finished version of the document that might be output to print, CD/DVD, a website, and/or transmitted to a desktop or PDA instantly via telecommunications. While all of this can make life easier, it also results in a whole new set of challenges in terms of document management, archiving, and retrieval.

High-volume print providers are a little closer to this issue than most because of the need to create documents in all their various forms and be able to store them and manage their usage appropriately based on client requirements. The key word is "appropriately" because different clients and different industries live by different standards and regulations for document security and archiving. However, the one thing they all have in common is the need for a flexible and efficient archiving and retrieval system.

Additionally, all businesses routinely generate sensitive information that they are required to keep for a designated length of time. Payroll, tax, and other financial documents fall under this heading and often must be retained for seven years. Insurance companies can be required to keep copies of policies for the full lifetimes of their customers. With these types of documents, security is a serious concern. Considering that a print provider is more often than not functioning as an outside vendor, bearing the a legal responsibility for the security and safe storage of highly sensitive client information can be a challenge. Archiving and retrieval security requires close attention to serve clients, as well as to protect your own business interests.

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Where to begin

In developing any document archive and retrieval system, begin by determining how long a document must be kept and who will need to access it. First, ask clients which of their documents might carry special regulatory archiving requirements and design your storage system based on that information. Second, discuss your clients' security needs and work with them to establish procedures to control exactly who is approved to access certain documents.

For instance, CSRs may need complete access to files like customer orders, billing information, even production and shipping details. But the CSR usually doesn't need to see payroll records. So it might make sense to it down with clients to draw up a security "pyramid." This hierarchy features CSRs, sales and production employees as the base, managers and supervisors in the middle, and only C-level executives at the very top. Passwords and other protocols ensure that only employees who require the information will be able to see it.

Another issue to consider is the format of archived documents. Applications software continually changes, so documents stored in their native formats may be unreadable by the technology in use five or ten years from now. And even today, users require flexible, fast output options. Adobe's PDF format provides a useful solution for data archiving by making files presentable on almost any medium, and it uses compression algorithms to reduce file size for quick file retrieval and transmission. And it's widely used and keeps pace with new software developments.

Finally, determine a method to regularly destroy expired documents. Once a document has served its purpose and satisfied regulatory requirements, get rid of it as soon as possible. Be sure files are not only "deleted" from a hard drive but entirely erased or made inaccessible. When a document passes its expiration date, keeping it is only a liability.

Terry Wieczorek is president and CEO of DocuLynx, Inc., a leading provider of archive retrieval, electronic distribution, and web presentation solutions for print service providers. He will be speaking at the Xplor Global Conference in Tampa Bay, FL on Friday, March 19, from 8:30 to 9:20 am on the topic of "The Need for Effective Document Archiving in the TransPromo World." For more information about DocuLynx and its Mercury document archive/retrieval software for high volume transactional output, visit www.doculynxinc.com, or contact DocuLynx at info@doculynxinc.com.

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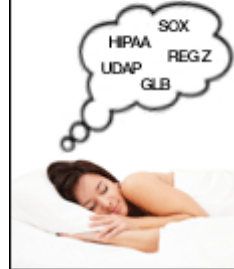
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