

Bylined Article for e-Document News

Moving Forward with Application-minded Archiving

by Terry Wiczorek, President and CEO, DocuLynx, Inc.

When strategizing how to move from more traditional approaches to a more flexible application-minded process when it comes to archiving documents, there are several things to consider internally. First, you need to clearly identify the parameters around each application produced. Typically, a company archives its documents depending on what government body it is trying to comply with. For example, in the insurance industry, you have to maintain a copy of a life insurance policy for the lifetime of the person plus five additional years. IRS-related documents may have a life of three to five years, while in other industries, like cable TV, it might be seven years. And even if there isn't a governing body dictating what your company should do, you still need to make sure you are in compliance with what is expected by your customer base. So, for example, should a customer come back with a question on a past promotion you ran at the holidays, you have that document easily accessible.

The second thing to consider is the other reasons you are keeping the document in addition to its compliance requirements. Is it important to have it online? Is portability a plus? Portability protects you in an audit should the government decide to knock on your business door. Having your documents on a CD/DVD makes it possible to access only what you want to share, and nothing more, which can prove to be very valuable at certain times.

Flexibility is always the key to success

Once you have determined the strategy around storing the document, it is time to get down to the nuts and bolts. When supporting your archival and retrieval needs, the solution you choose, first and foremost, has to be scalable. It has to be flexible enough to manage the changes that are (and will be) occurring in your business. So no matter how your documents are stored, it is important to have the ability to keep them in their native format and then be able to reproduce them in a common format, such as PDF. That way, when you exit the application out for review, you have the ability to take any kind of document format easily in and out of the system.

As time has progressed and due to largely to the speed of the Internet, people want things instantly. So to meet this expectation, it is important to be able to review and load reports rapidly to accommodate those who want to have the ability to review documents instantly. Additionally, people also want access to what they are looking for when researching on their own. Your archival solution should provide the ability to grab data from the Web and download the information. And unlike microfiche where everyone can see everything, today's archival solutions provide the security needed to allow you to establish roles to determine what kind of information is available to certain parties for access.

The bottom line for end-users or third parties

Today, most large enterprises choose to outsource the handling of their documents to a third party and focus on their core business. It allows a company to stay on the cutting-edge when it comes to both the software and services surrounding document needs. But whether you are an enterprise, or a trusted service provider, there are certain requirements to look for to ensure you have the ability to archive and quickly retrieve documents. Your solution must be scalable and portable; it must have the ability to process documents fast; have online and offline capabilities; and the bandwidth to meet your storage requirements for seven years or beyond. Because remember, in today's fast-paced world, speed is everything and security is a close cousin. Be prepared.

(This article is third in a three-part series by Terry Wiczorek.)

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