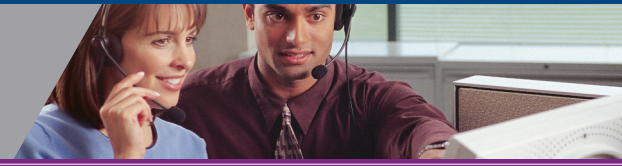


## A Global Technology Leader



### An Iron Mountain Scanning and Image Archive Solution Helps a Technology Leader Manage Contracts to Support Business Goals

- CUSTOMER:** A Global Technology Firm
- BUSINESS:** Technology
- CHALLENGE:** Contracts and agreements were being created and stored in 20-plus locations worldwide, using cumbersome manual processes. This made it difficult to access contracts in a timely way to support business initiatives, compliance requirements, and legal actions.
- SOLUTION:** Iron Mountain helped the customer implement a document conversion and Image Archive solution that puts 100,000 contracts within easy reach of legal professionals and other authorized users.
- BENEFIT:** The customer greatly enhanced distributed access to documents while reducing onsite document storage costs.

#### THE CUSTOMER

With annual revenues that exceed \$11 billion and a presence in more than 100 countries around the globe, the customer provides network computing solutions to leading enterprises in business, science, education, and government.

#### THE CHALLENGE:

In the normal course of business, the company enters into a wide range of contracts and agreements, which pertain to mergers and acquisitions; real estate transactions; sales; employee benefits; and business agreements with technology partners.

**Fast, easy access is essential.** While many of these documents are seldom referenced, they need to be visible and accessible to users across the company for time-sensitive events such as contract renewals, litigation, and due diligence related to pending deals. Because the user population includes attorneys whose time is worth hundreds of dollars an hour, the ability to quickly locate and retrieve relevant agreements is essential.

**Manual processes stood in the way.** In the past, document storage and management was handled at the site where the agreement originated, using cumbersome manual processes. The paper document was stored onsite; to make its existence visible to other users in the company, its Legal File Identifier (LFI) number was entered into a database system. Search capabilities were

*The solution included a backfile conversion of 30,000 original paper documents plus day-forward conversion of more than 2,500 newly created documents per week.*

very limited, and users had no way to scan the contents of a document before requesting that it be sent to them. Transmitting a document was equally cumbersome, requiring an employee to fax it, ship it, or create a PDF file to be emailed as an attachment.

Clearly, a more timely, efficient, and cost-effective system was required, and Iron Mountain was the company to provide it.

#### THE SOLUTION:

Previously, Iron Mountain had managed off-site storage of the company's paper records. Building on the knowledge and trust gained through that relationship, Iron Mountain helped create an end-to-end solution for capturing, managing, and providing secure distributed access to contracts and agreements. The solution included several components:

# CASE STUDY

IRON MOUNTAIN | TECHNOLOGY COMPANY

- A one-time backfile conversion of 30,000 paper records to electronic format.
- Development of day-forward workflow processes for indexing and scanning approximately 2,500 new documents a week.
- An Image Archive, hosted by Iron Mountain, which allows authorized users to easily and flexibly search, locate, view, and retrieve electronic copies of the documents they need from any location.
- Offsite storage of original paper documents at secure Iron Mountain facilities.

The solution was designed to fit into the customer's routine business processes and leverage the expertise of legal and administrative staff who are most familiar with the documents, regardless of where they are located.

**Indexing.** As a first step, a staff member accesses an Iron Mountain web site and creates an index entry and unique LFI number for a given contract using the KwikTag "file, tag and scan" methodology. The user populates data fields with information that enhances searchability - such as the type of agreement, parties to the agreement, and termination date. A bar code sticker with the unique identifier is printed out and affixed to the paper document so it can later be associated with the corresponding index entry; the bar coding also allows the system to easily distinguish one imaged contract from another.

**Imaging.** Paper documents that have been indexed are batched together and sent to one of four high-volume scanning facilities: in Europe, Asia Pacific, Southern California, and Denver. All the pages in the document are imaged, and the image file undergoes a rigorous quality check before being posted to a secure FTP site.

**Capture and Image Archive.** At Iron Mountain's National Underground Site (NUS), the index file for a contract and the corresponding image file are associated, using patented KwikTag server technology. The resulting unified record is uploaded to an Image Archive, where it immediately becomes available to the organization's authorized users. They can search the archive using multiple criteria and view the document image to verify its contents. They can also print, download, and email documents to other users. A complete audit trail of activity enhances security, accountability, and regulatory compliance.

**Box Storage.** The original paper contract is sent to an Iron Mountain site, where it is stored in a secure, environmentally controlled setting. On those rare occasions when an original contract is required, a proven chain of custody ensures close tracking of the document from the moment it leaves the facility to the time it is returned.

## THE BENEFITS:

The customer has achieved several benefits from its solution. Most importantly, the company can respond quickly to requests for contracts and agreements, whether for business, legal, or regulatory purposes. There has been a dramatic reduction in staff time spent searching for documents and sharing them with colleagues. Costs for onsite records storage and management have also been reduced.

The solution facilitates the timely destruction of paper and electronic records, in keeping with the customer's retention schedule, thus enhancing compliance while reducing exposure to discovery and litigation.

Leveraging its initial investment, the customer has also begun to manage other asset types including patents and records relating to mergers and acquisitions.

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