

Taking Control of Document Management

Document Management Software and Bar Code Scanning achieves greater accuracy and better integrity on inventory

When law firms, insurance companies and hospitals store their documents with Fireproof Records Center, they expect three features:

- Security
- Quick access, and
- Confidence that what they think they stored, truly is stored.

It really all comes down to one word, however: Integrity.

And that's precisely what Fireproof Records Center, a Columbus, OH-based information management service provider, guarantees its 1,400 and growing clients.

"Integrity is our whole business," says Mike James, vice president. "Reliability and integrity are critical. That is why people use us."

Area hospitals, insurance businesses and legal firms use Fireproof to not just store their files, but to track where they are, be they on the client's premises or at one of the three Fireproof Records Center facilities.

"Inventory is what we do, so we have to know what comes in and out," says James. "A big part of our business is medical, insurance and legal, so it is critical we find the information in a timely manner."

The information, including medical records, insurance claims, X-rays and legal documents, is stored in 385,000 square feet of warehouse space at three facilities. It comprises 6 million individual file folders and an excess of 1 million cartons.

Most are in hardcopy form, but more and more are received or converted to digital formats, especially medical images. Unlike some records storage facilities that basically house records rarely needed anymore, Fireproof handles many files often required back at



the client's facility. It retrieves more than 130,000 files annually and initially stores or replaces about the same amount. It also tracks records stored in a client's building before they are moved to Fireproof's facilities. To do that, it provides cradle to grave tracking through shared software systems, bar code scanning and an Internet-based records database.

"Our business can track documents efficiently, even pages within a file and images associated with that file; or the history of a file; or the length of time someone had it. If a file gets to a fifth person and a document's missing, we can check who's touched it to determine if the document can be retrieved. Especially in legal situations, the integrity of a document is vital," says James.

"We save our clients cost and time, and they don't have to invest in the technology," James says in explaining why companies use a third-party document storage provider. But the bottom line is the clients always know exactly where each document is, be it on the client's site or Fireproof Records'.

Enabling this real-time tracking is Total Recall™ Records Management software interfaced with a bar code scanning system from Compsee, Inc., a leading total solutions provider of automatic data capture systems. DHS Associates created Total Recall™ and integrated it with the rugged Apex II hand-held scanner from Compsee and a Datamax Prodigy thermal-transfer label printer. Total Recall™ is a 32-bit Windows 95/98NT-

Vital Statistics

USER:

Fireproof Records Service
Columbus, Ohio

APPLICATION:

Document Management

TECHNOLOGY:

Portable Bar Code Data Collection

OUTCOME:

Track Document Efficiently
Save Clients Cost and Time
Allow business to grow and
enable on-line web access
Retrieval in minutes

compatible product; at Fireproof Records, it runs on Citrix NT and Microsoft NT servers. A WAN (wide-area network) connects the three storage facilities.

Good discipline, good scanners, good system equal integrity

"Because of our size and volume, we needed a good discipline in place to make sure the right documents are coming and going. We needed a system and scanners that could handle thousands of files a day. We wanted to make sure we got what we were supposed to get...and be able to guarantee our clients we put the right document in the right box so when they asked for it again, we could easily find it," says James.

Total Recall™ provided that and allowed for the future, both in scalability and in new technologies, particularly digital records, scanned images, computerized dial-in services and Web-based document tracking.

"The biggest advantage of Total Recall™ is it allows us to grow our business and gives us on-line web access or direct dial-in capability," says James.

Clients can dial into the database maintained at Fireproof Records Center to see where their records are presently located, or they can use a Web browser and the Internet. Before, clients might first check their file rooms and their own records. If the documents weren't on site, they would then contact Fireproof. It was a two-step process at minimum. Now, with a single dial in or Web search, the client knows exactly where the files are located with the first search, and, if at Fireproof Records, can immediately request them.

The beginning of integrity

The tracking process begins with an all-in-one, three-part, preprinted bar code label and form. The records management company has been using bar codes for 10 years,

but only converted to the all-in-one label and form unit with the installation of the Total Recall system. The multi-part form makes it easy for clients to apply a bar-



coded label to a box and keep a record of the shipment itself. Similarly, it provides a copy for Fireproof. The company gives each client the label/form combo (preprinted by third-party provider) to identify each carton when it is created. The Total Recall™ software knows what numbers were pre-assigned to which clients. All bar codes at Fireproof are in Code 39 symbology, the document management industry standard.

The client applies the bar-coded label (the bottom of the three layers) to the cartons, keeping the top sheet with the box's description, date range of contents, destruction date or records retention series, box number and department.

Once the client creates the carton and applies the bar code label, it can scan the bar code for its records. When Fireproof Records Center picks up the carton at the client's site, it also scans the bar code. The bar-coded label is again scanned at Fireproof's receiving dock. There, its size is also recorded and the bar code on the temporary pallet it is placed on is scanned. The box remains on a temporary pallet no more than 24 hours before it is

stored in its permanent location where a bar-coded shelf label is scanned, as is the box's bar code.

Fireproof's shipping and receiving department uses the middle part of the form to update its records including the box description, box number, destruction date, etc. If the client uses Total Recall's remote access system, it key enters the information and sends it electronically to Fireproof. Either way, the middle copy also acts as a backup for Fireproof.

"Everything we do electronically, we have to do on paper to make sure we have it if the system goes down," says James. "Redundancy is very important."

"Total Recall allows us to manage how many labels we gave to clients, so we can better manage documents moving in and out of their building and to operate in a just-in-time environment," says James.

Onsite labels are printed on the Datamax printer in the event something is pulled from the contents of a box for return to the owner. It ensures specific records are subsequently returned to the appropriate box.



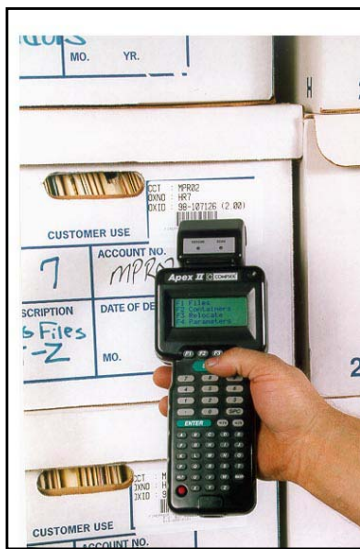
Workers scanning pickups at client sites download the hand-held

scanners whenever they return to the warehouse, usually twice a day. Inside the warehouse, the hand-held scanners are downloaded generally every hour. Each unit is placed in a special dock or cradle to automatically upload the data into the Total Recall data management software.

"The combination of the document management software, the bar code labels and the scanning gives us greater accuracy and better integrity on inventory than before," says James. "Because more and more of our clients are sending active records to us, we must be ready to retrieve them quickly. We have to know what we have."

"One major advantage of tracking the process throughout the operation is it gives us better control. It also provides accuracy and increases productivity," says James.

He gives the scanners high marks for ergonomics, comfort, handling, and its display screen, but he especially praises the successful first-time read rates. "We get good readings from the Apex II scanner. We don't have to scan multiple times for one label."



With so many documents flowing in and out daily, robust scanning is critical. "With our volume, it adds up if you have to do it twice. With

the Datamax printer you get a top quality label and then the scanner ensures the quality of the scan. You get it right the first time," says James.

Integration with ease

Fireproof Records Center also likes the document management software because it easily integrates with various imaging programs such as ImageMax. Fireproof uses ImageMax to scan images into the database system.

"It's important for the databases to be compatible since Total Recall is the main tracking system," says James.

At the outgoing side of the operation, when clients request stored files (either by Web, phone, fax, or direct dial-in), pick lists are created, the files selected and sent to the client. The pick order is used to indicate the record is out of Fireproof's facilities. Eventually, Fireproof expects to abolish its paper system and provide the pick lists electronically in the hand-held terminals, but for now, it uses the paper for an accounting trail.

Fireproof can access up to 150 standard reports, in hard copy or online, from the software program or create its own. Its clients can also access many of the reports. Fireproof can customize index fields for each client so they can use captions and titles that have meaning for their specific company.

The program "maintains a complete history and audit trail of all activities and indexes records extremely fast," says Steve Hyman, president of DHS Associates.

A billing module creates customizable invoices for each client and can break the invoices down by department, bill multiple clients or bill a group.

Flexibility benefits Fireproof and clients

Total Recall's flexibility for both Fireproof Records Center and its clients is another reason the 20-year-old document management firm chose it. James says Fireproof wanted to offer its clients multiple records-access methods so they could use whatever works best for them, be it Internet connect, fax, computer dial-up or phone.

"Not everyone is Internet bound, so we wanted to be able to meet all our clients' needs. Some, when dealing with highly confidential records, want a direct dial-in with a modem and direct line to our system so they are not going over the Web. When a client connects, they are told where the file is, who has it, and how long they've had it," says James.

Another flexibility feature is the Apex bar code scanner can autodiscriminate bar codes, enabling it to read a client's bar codes. "Hospitals don't want to be told how to run their document storage systems, so we have to take our systems and operating procedures and adapt them to meet clients' requirements," notes James. The Total Recall/Compsee system allows that.

Fast recall

Whether clients locate their files over the Web, direct dial-in, telephone or fax, the new system knows much quicker than in the past the item's status.

Information is recorded into the document management system quicker because the box is already bar-coded when Fireproof picks it up at the client's storage site. In some cases, the client has already electronically transmitted the storage information. Before, Fireproof had to retype data, print a label and put it on the right box. "The benefit of the label is the owner of the information is identifying the contents immediately upon its creation. Now we just touch, scan, update our

system and quickly access it," says James

"The key is having one system with an efficient way to do it, i.e., labels on everything and good bar code equipment. We are not adding a lot of steps that require more time or labor to process the boxes," says James.

"We can get the information about the documents into a database quickly so they are accessible and can be delivered to the owner upon request. We can provide them with instant access to their information," says James.

Administration streamlined

Total Recall also handles the administrative part of this information management business. It automatically prices records storage and retrieval requests and bills clients, as well as provides other administrative functions.

"We can grow without adding a lot of administrative support," says James, a big plus for the software.

With the merger of many document management firms and the resulting highly competitive market, Fireproof Records Center sets itself apart with the records management system because it offers:

- Customer flexibility
- Record tracking from creation at the client's facility. "We wanted to move up the records life cycle," says James.
- Ease of use for clients.

Says James, "We're not just boxes on shelves. That's what separates us and Total Recall™ from every other system. We can become more entrepreneurial in offering a variety of flexible, real-time client services, yet provide the integrity that is the heart of our business."



Total Recall™ Records Management Software is the most comprehensive records management software available on the market today. Total Recall™ builds upon eleven years of records management software development experience to bring you the most advanced 32 bit Windows® based records management software available.

Total Recall™ Features:

- ◆ Easy to use Windows® interface.
- ◆ Multiple indexes for all containers and their associated contents.
- ◆ Extensive management and client reporting capabilities.
- ◆ Comprehensive departmental tracking and reporting including extensive client reports.
- ◆ Efficient work order processing. The program automatically bills for all services performed.
- ◆ Complete statistical reporting and audit trail for all activities.
- ◆ Extensive bar-code functionality...works with Compsee® bar code readers. Prints bar code and human readable labels.
- ◆ Multi-level inventory tracking. This feature lets you track both containers and the contents of containers.
- ◆ Comprehensive record series and records retention features. Total Recall™ tracks and reports destruction dates.
- ◆ Easy to Use.... Requires no special computer expertise. Includes on-line help and comprehensive color users manual.
- ◆ Media modules for tracking tapes and other vault materials.
- ◆ Web and Remote Access modules.

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