

Iron Mountain

SMART ASSIGN

Automatically assign record codes according to your organization's retention schedule

Business challenge

Easily identifying and taking defensible action on your records requires an accurate inventory, including box-level record codes that are aligned with your organization's retention policies. When records are stored in boxes *with* identifiable descriptions but *without* unique record codes, it is difficult to initiate legal holds, respond to audits, and make defensible decisions about what to retain, digitize, or destroy.

How this affects you

Failure to assign record codes according to your retention policies means you're likely over-retaining records. This not only invites unnecessary costs and risks, but it also limits your ability to respond quickly to compliance obligations or easily navigate mergers, acquisitions, and divestitures.

Do you...

- have volumes of inherited records?
- have records stored for 10 years or more?
- store records without record codes?
- struggle to assign retention dates to boxes without record codes?
- lack the staff, expertise, and budget to manually review your inventory?
- lack a standardized and defensible approach to applying record codes?
- struggle to make defensible decisions about retaining, digitizing, or destroying records?
- want to go paper-lite or paper-free?

If you answered yes to any of these questions, ask us about Iron Mountain Smart Assign.



Industry fact

93% of organizations have a goal to eliminate paper records in the next five years.

—Records Identification and Cleanup Priorities Survey, conducted via a third-party provider, April 2022.

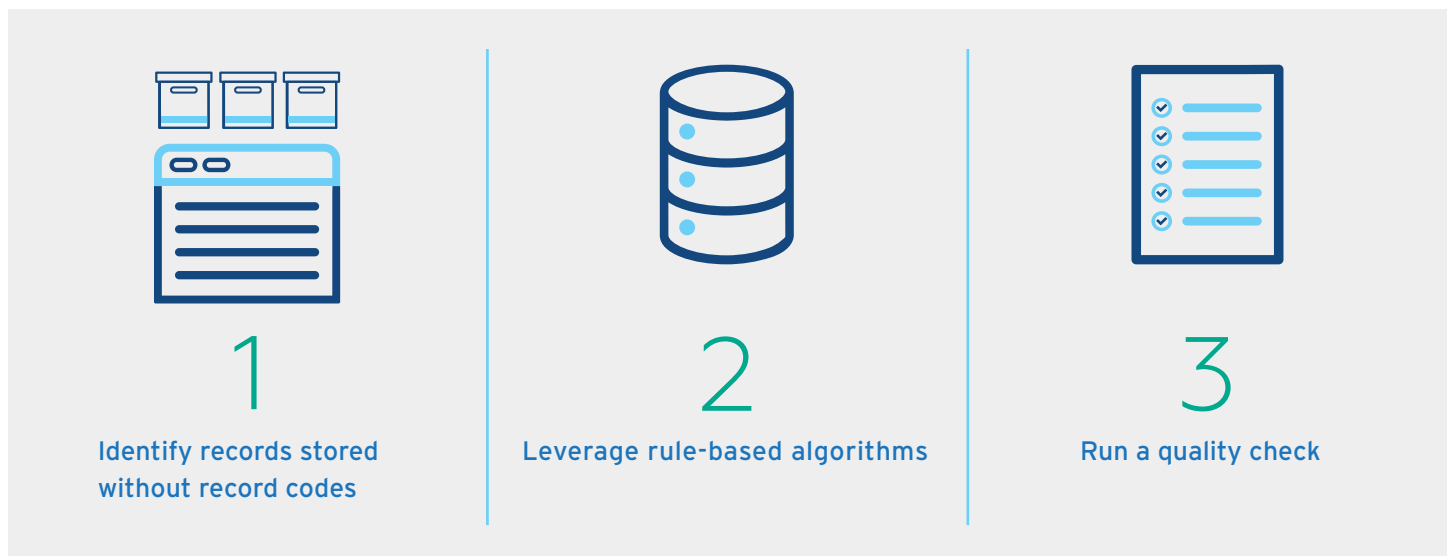


Assign record codes at scale

Iron Mountain Smart Assign is a technology-enabled solution that streamlines the process of assigning record codes at the box level. By assigning record codes that are aligned with your organization's records retention schedule, Smart Assign provides you with the visibility and confidence you need to make informed, defensible decisions on what to retain, destroy, or digitize.

How Smart Assign works

Solution summary



Step 1: Identify records stored without record codes.

We work with you to identify boxes of records stored with descriptive information but without record codes.

Step 2: Leverage rule-based algorithms.

Smart Assign is built on decades of experience and a vast rules-based repository of keywords, phrases, dates, departments, and other important fields. Leveraging this repository of over 40,000 rules, your inventory report, and an up-to-date retention schedule, Smart Assign helps identify boxes that need to be addressed and automatically applies record codes.

Step 3: Run a quality check.

Once record codes are assigned, a solution specialist will run a quality check and send you a summary for authorization. Once you agree to the assigned codes, the information is uploaded to Iron Mountain's database and made available to you via our online portal.

Result

Now that your records have been properly assigned according to your policies, they can be defensibly destroyed at the end of their retention period. For active records, you will now have what you need to facilitate future disposition decisions.

Efficient. Cost-effective. Done. Improve compliance with Iron Mountain Smart Assign.

What this means for you:

- > Improve visibility and confidence now that you have a defensible program.
 - > Assign record codes at scale, according to your retention schedule.
 - > Make defensible decisions about what records to keep, digitize, or destroy.
 - > Improve budget planning.
- > Reduce the cost and risk of records storage.
 - > Accelerate digital transformation.
 - > Easily apply and manage legal holds.
 - > Navigate mergers, acquisitions, and divestitures.
 - > Simplify your ability to defensibly destroy what you no longer need to retain, now and in the future.

And you get all this without touching a box.

Smart Records Cleanup Suite

When it comes to cleaning up your legacy records inventory, we understand that no two boxes are alike and that different circumstances require different approaches. That's why Smart Assign is just one component of Iron Mountain's Smart Records Cleanup Suite, a collection of solutions that, together, address your organization's entire legacy records inventory.



Have boxes missing record codes? Smart Assign automatically assigns record classification codes according to your organization's records retention schedule.

To learn more visit: ironmountain.com/smartsuite



Storing boxes full of unknown contents? Smart Reveal takes purposeful photographs of each box so that you can understand the contents and make informed decisions about the next steps.

To learn more visit: ironmountain.com/smartsuite



Commingled files? Smart Sort technology reorganizes your files according to destruction eligibility, category, association, or whatever you require—regardless of record storage location.

To learn more visit: ironmountain.com/smartsuite

Want to learn more?

Contact your Iron Mountain account manager or visit ironmountain.com/smartsuite

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About Iron Mountain

Iron Mountain Incorporated (NYSE: IRM), founded in 1951, is the global leader for storage and information management services. Trusted by more than 220,000 organizations around the world, and with a real estate network of more than 85 million square feet across more than 1,400 facilities in over 50 countries, Iron Mountain stores and protects billions of information assets, including critical business information, highly sensitive data, and cultural and historical artifacts. Providing solutions that include secure storage, information management, digital transformation, secure destruction, as well as data centers, art storage and logistics, and cloud services, Iron Mountain helps organizations to lower cost and risk, comply with regulations, recover from disaster, and enable a more digital way of working. Visit www.ironmountain.com for more information.

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