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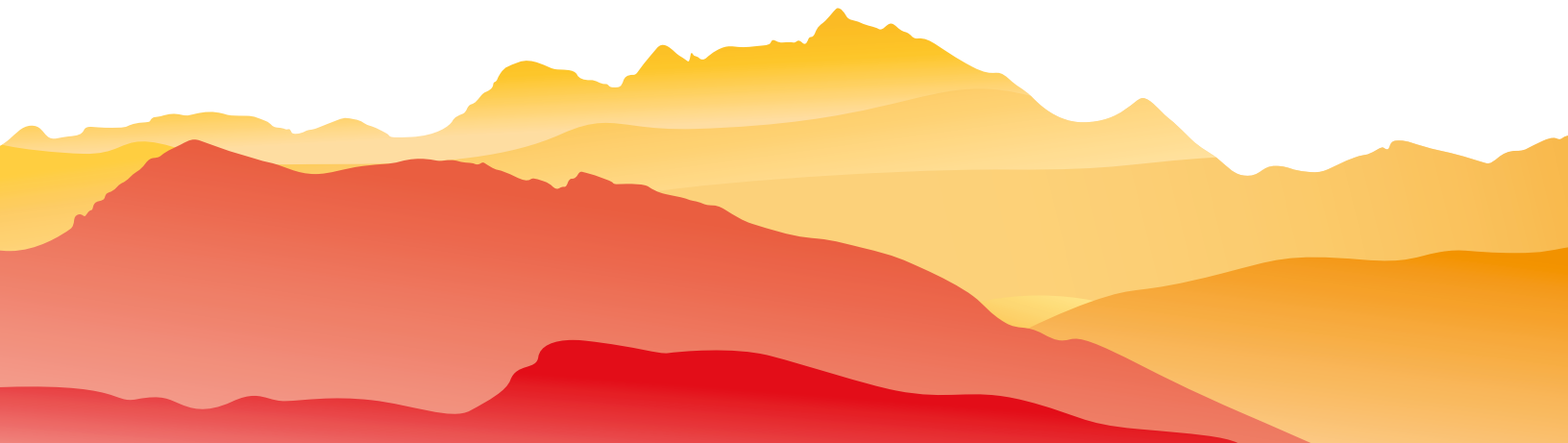
Customize and maximize with InSight Solution Designer

Quickly design, build, and deploy comprehensive, secure, and compliant information management solutions in a single platform

Executive summary

Iron Mountain, a long-standing leader in document management, provides the comprehensive InSight® Digital Experience Platform (DXP), a tool that paves the way for organizations to embrace digital transformation. An integral piece of this overall platform is Iron Mountain InSight® Solution Designer, a flexible tool that enables a solution provider to both build and customize the overall platform to meet the exacting needs of the organization. The self-service capabilities and low-code model of Solution Designer empowers end users and administrators to drive better productivity by putting the control into the hands of the people who can utilize it fully as they best understand their workflows and procedures.

With InSight Solution Designer, you can take advantage of:

> A set of low-code and templated solution design tools that can be used to create custom user interfaces and workflows

> An integrated model design tool to enable intelligent document processing

> Integration with the latest artificial intelligence (AI) technology

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Market drivers

As organizations digitize, they need a platform to manage content. Solution providers face the challenge of creating tailored solutions for different industries and customers, often hindered by outdated or limited tools that don't integrate well, causing potential security risks and compliance issues.

Solution providers also require a platform with the necessary tools for quick development, deployment, and customization of solutions. A high level of self-service is vital for both providers and end customers in today's cloud-centric IT world, as users need flexibility and empowerment for successful system deployment.

Iron Mountain InSight Solution Designer

As part of InSight DXP, InSight Solution Designer is an innovative component of the platform that enables solution providers to quickly design, build, and deploy comprehensive, secure, and compliant information management solutions in a single platform.
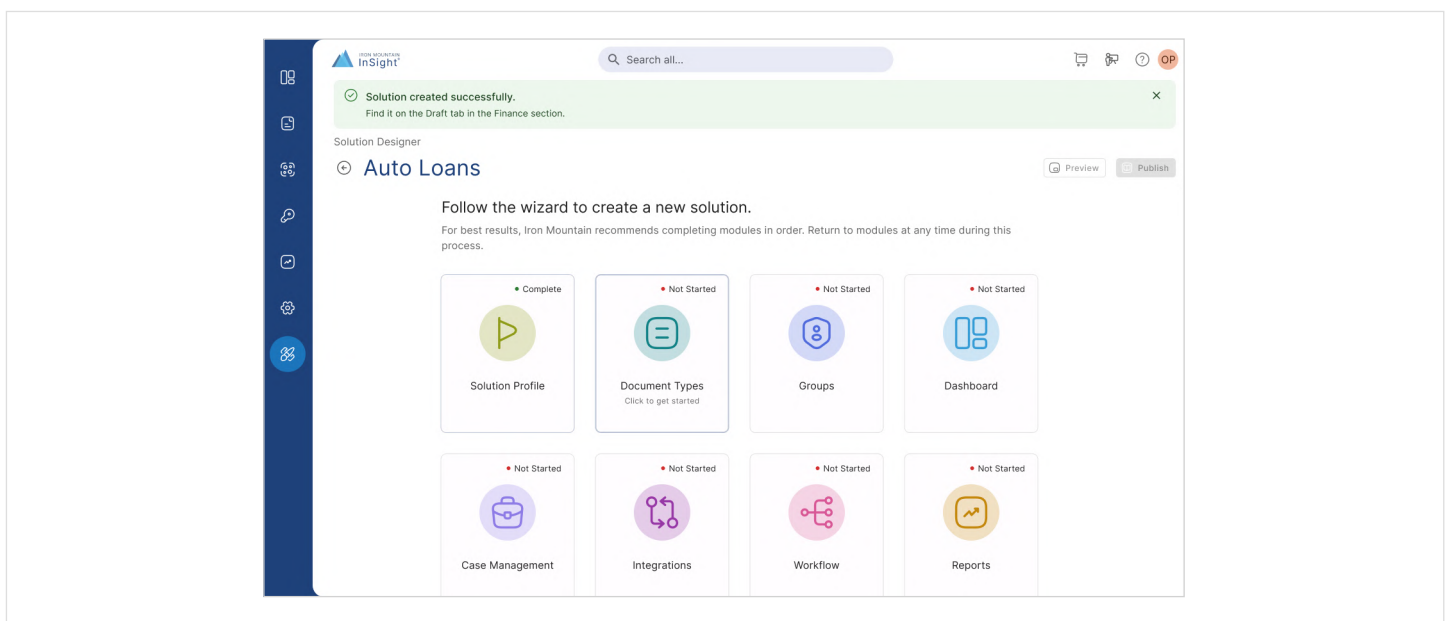
Delivered by key solution providers who work directly with Iron Mountain, InSight DXP is a low-code solution that brings tremendous power to organizations as they make their move into a digitally transformed future.

Key software features of InSight Solution Designer

InSight Solution Designer is a feature-rich application that enables incredible amounts of customization, all within a low-code / no-code environment. Some of the key features that can be found in the application include:

> **User interface designer –** Enables the creation of custom user interfaces that enable the platform to better integrate into existing organizational workflows

> **Intelligent document processing –** Designed to enable the auto-classification of documents, the extraction of metadata, and the enrichment of content with AI, enhancing and automating the intelligent document processing tasks

InSight Solution Designer main screen

> **Workflow designer –** Creates custom digital workflows that can be tied into existing organizational workflows

> **Low-code / no-code environment –** Enables users to interact with the system without possessing specialized skills or data scientist expertise

> **Integrated AI capabilities –** integration with the latest generative AI (genAI) applications for intelligent document search, summarization, risk identification, and categorization using customer-only document sets

> **Out-of-the-box solutions and templates –** Get up to speed quickly through pre-defined templates and solutions, all of which can be modified to meet an organization's exact needs, preventing everything from being built from scratch

> **Real-time design and deployment –** Enable users to quickly build and immediately deploy solutions or changes, boosting productivity and reducing administrative overhead requirements

> **Support for application programming interfaces (APIs) –** Compatibility with major applications and frameworks enabling the easy connection of existing tools and workflows with minimal or no programming needed at all

How InSight Solution Designer works

InSight Solution Designer features a low-code environment that enables practically anyone with knowledge and understanding of an organization's workflows to customize these workflows, creating digital applications for capturing and handling information.

The self-service capability is an important aspect of the product, empowering users to create and modify the application as needed. This facet allows for better productivity and real-time updates that help drive better agility for an organization, responding quickly to immediate needs.

InSight Solution Designer's workflow screen features a drag-and-drop editor that enables a user to lay out the steps of the solution and then connect them according to the workflow. The "run" command enables the user to see the workflow in action.

Once the workflow is set up, InSight Solution Designer enables the user to select the types of documents that are going to be involved in the workflow, along with their corresponding data fields and locations.

Metadata fields as well as tags and descriptions can be added to the workflow in relation to the documents.

InSight Solution Designer workflow design

Once the designer has the workflow established and has brought in the appropriate documents that need to be included, the metadata – information about the information – can be added, enabling for better categorization of the data that will be captured by the workflow.
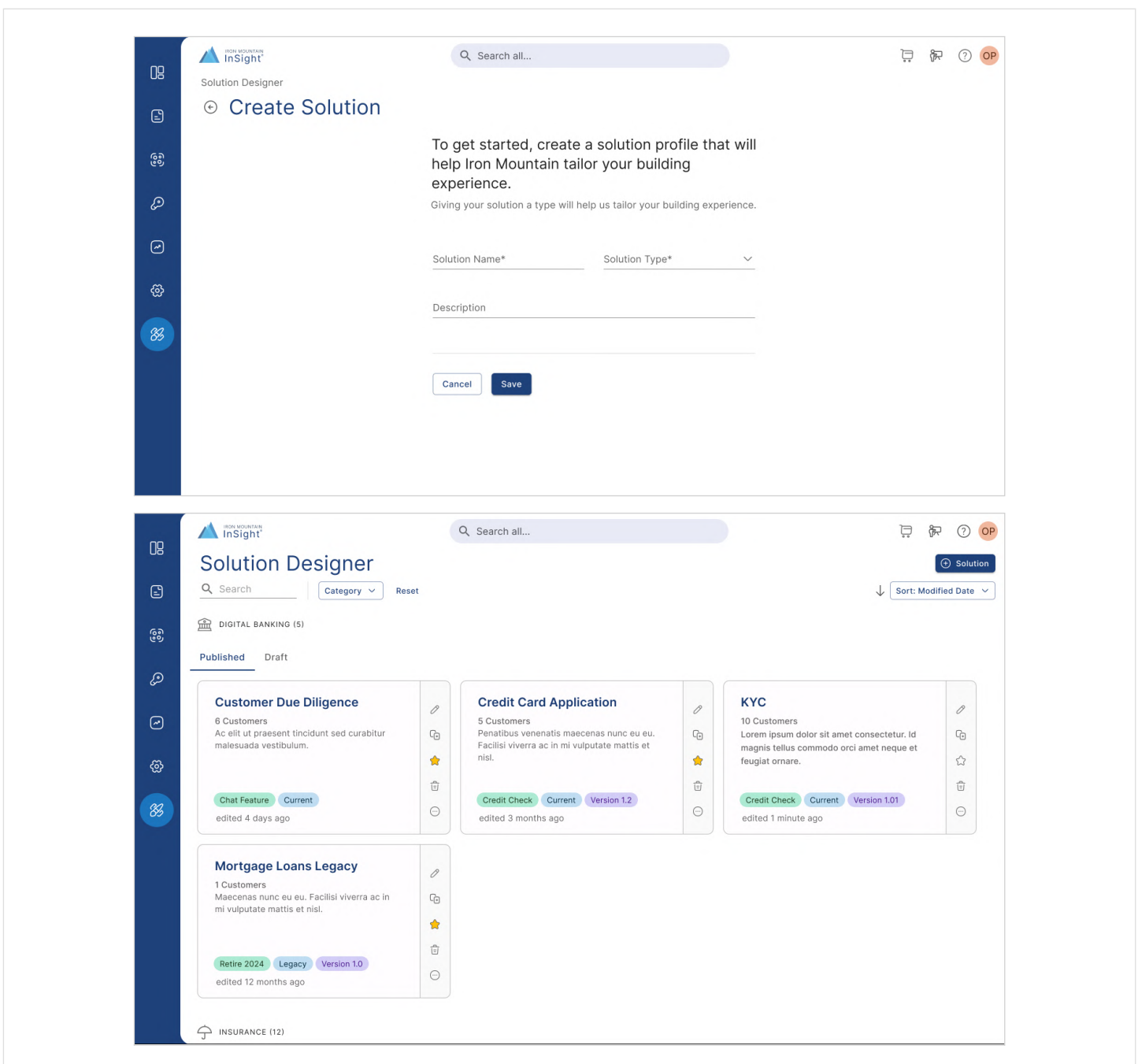
All these low-code capabilities enable users, with just a few clicks of the mouse, to build or modify solutions in a self-service manner, boosting productivity and reducing the complication of building and deploying the overall solution.

InSight Solution Designer use cases

As an overall part of InSight DXP, InSight Solution Designer delivers the capabilities for many use cases where deep customization can unlock additional value for organizations.

Here are a few examples of the benefits that InSight Solution Designer can deliver:

InSight Solution Designer features extensive solution creation capabilities

Human resources

With a complex landscape of human resources (HR) applications that often do not communicate or share data, it's challenging for HR leaders to manage HR documents and data. When HR systems lack information management capabilities, it makes it even more difficult to find what you need when you need it. This leads to HR staff spending too much time on manual, tactical tasks. What's more, organizations need digital offerings to check all their security boxes to maintain confidentiality of sensitive and private employee information in compliance with industry regulations and company policies.

With InSight Solution Designer, system integrators and partners can get a head start on their customization needs by leveraging Iron Mountain Digital HR solution template. With the ability to customize any portion of the solution real time, solution designers can leverage the power of AI to help drive more efficiencies across the organization, maximizing the ability to search, sort, categorize, and summarize employee information in seconds.

Invoice processing

For accounts payable (AP) professionals, paper invoices, received by mail, are still the norm. Once invoices reach AP, processing requires labor-intensive manual handling, including opening and sorting mail, manual data entry, researching the correct purchase codes and general ledger (GL) accounts, identifying duplicate invoices, comparing to the original contract or purchase order and receipt of goods or services, and handling extensive exception processing. These manual processes introduce the risk of errors including costly missed or duplicate payments. They also require AP professionals to be physically present in the office, so they can't take advantage of flexible hybrid and remote work arrangements.

With InSight Solution Designer, system integrators and partners can get a head start on their customization needs by leveraging Iron Mountain Invoice Processing solution template. With the ability to customize any portion of the solution real time, solution designers can make invoice processing more transparent for customers by providing the ability to view, manage, and process invoices from a user-friendly portal. You can improve accuracy by automatically extracting invoice information and feed it into workflows to avoid errors resulting from manual data entry.

The customization capabilities of InSight Solution Designer enable rapid modifications, in real time, to help accelerate organizations. Through rapid modification and automation, organizations can capture and define more information, leading to faster time to innovation, which drives the highest levels of productivity and efficiency.

Across the board, InSight DXP with InSight Solution Designer delivers tremendous benefit for not just these use cases, but for a wide range of use cases across every industry as all organizations are focused on the move to a completely digital world of information.

Benefits of InSight Solution Designer

As a part of InSight DXP, InSight Solution Designer is part of a complete information management platform that can help bring organizations closer to their digital transformation goals.

Key benefits for users of this platform, and InSight Solution Designer specifically, include:

> **Productivity –** As a low-code / no-code platform, a key benefit for organizations is the immediate productivity that they will experience. The intuitive, drag-and-drop user interface enables users with little or no experience in application development to immediately customize the interfaces and workflows. The people with the most organizational knowledge of the documents and workflows can now boost productivity for everyone by tailoring the platform to the organization's specific needs.

> **Customization –** Practically every component of the platform can be customized, all the way down to the organizational nomenclature and company-specific processes. Instead of a platform that requires an organization to change the way they work, the customization of InSight Solution Designer allows the platform to be tailored to the workflows, not vice-versa.

> **Real-time deployment –** InSight DXP, with InSight Solution Designer is uniquely engineered to focus on real-time deployment and modification. Instead of long, arduous development cycles and massive functionality releases, the InSight model focuses on real-time modification and immediate realization of the benefits based on changes.

> **Customer-centric environment –** The entire platform, from top to bottom, can be modeled to match the exact needs of the customer. With this as a focal point, the customer is in control and their input helps drive the adherence to workflows.

> **Self-service model –** Gone are the days of complicated tools that require too much administrator interaction. The self-service model of the entire InSight platform enables solution providers to build solutions that empower their customers. This greatly enhances the perceived value by the organization because they see the solution integrating into their workplace. Instead of long queues and trouble tickets that take too long to address, they see productive employees and effective document management.

Decide for yourself

To truly understand the power of InSight Solution Designer, organizations can try out the full InSight DXP, with their own data. The flexibility of the system and its ability to be tailored to your specific workflows provides evaluators with a strong understanding of the capabilities of the system and how the typical interaction will work. Iron Mountain InSight DXP is available as a try and buy, as well as a managed service. To see firsthand the power of the Iron Mountain InSight DXP system, contact Iron Mountain directly to arrange for a demonstration or a proof of concept based on your actual documents.

Summary

Overall, the move towards digital transformation is clear as nearly every organization sees the value in having a repository of digital information that they can utilize to drive their business processes. InSight DXP is a scalable, low-code software-as-a-service (SaaS) platform that ingests and processes unstructured content and can integrate with customers' key business processes and systems via API. The modular platform can be used to quickly build solutions with physical and digital content management, intelligent document processing, workflow automation, and information governance capabilities. Through a drag-and-drop capability and intuitive interface, the productivity of users is boosted as organizations can deploy faster, accelerating their digital transformation plans.

InSight Solution Designer even takes advantage of the latest genAI functions to help streamline and automate processing.

The key customization capabilities of InSight DXP are delivered through InSight Solution Designer. InSight Solution Designer enables solution providers to quickly design, build, and deploy comprehensive secure and compliant information management solutions in a single platform. Once deployed, the self-service approach to the whole InSight platform enables those with intimate knowledge of the workflows and documents to make modifications to the application without any need for coding or development knowledge.

About Iron Mountain

For over 70 years, Iron Mountain Incorporated (NYSE: IRM) has been your strategic partner to care for your information and assets. A global leader in storage and information management services and trusted by more than 225,000 organizations around the world, including more than 90% of the Fortune 1000, we protect, unlock, and extend the value of your work—whatever it is, wherever it is, however it's stored.

We create the framework necessary to bridge the gaps between paper, digital, media, and physical data and extract value along its lifecycle, helping to build your organizational resilience. And all this with a commitment to sustainability at our core.

Our relationship is a true partnership where you trust us not only to preserve institutional knowledge and enhance efficiency, security, and access but to make your work mean more. Because in that work is the power to not only accelerate your business but elevate it.

Trusted by more than 225,000 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 valued assets, including critical business information, highly sensitive data, and cultural and historical artifacts. Providing solutions that include information management, digital transformation, secure storage, secure destruction, as well as data centers, cloud services, and art storage and logistics, we help customers lower cost and risk, comply with regulations, recover from disaster, and enable a more digital way of working—and all this with a commitment to sustainability.

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