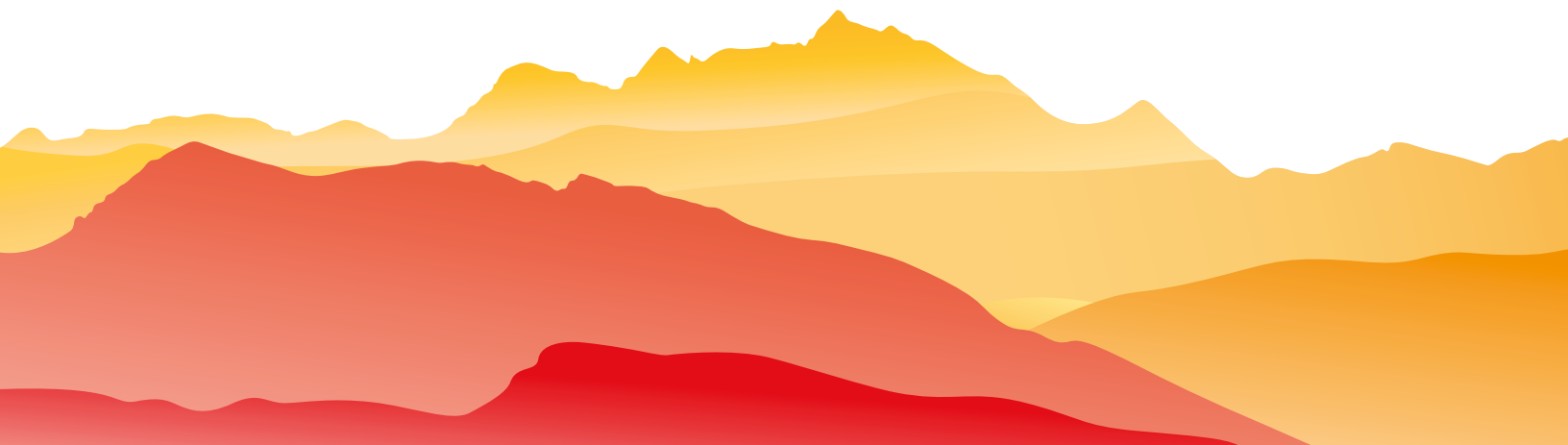




White paper

InSight Digital Experience Platform transforms the information experience

Iron Mountain InSight Digital Experience Platform enables the management and access of physical and digital information throughout the data lifecycle, all from a single location



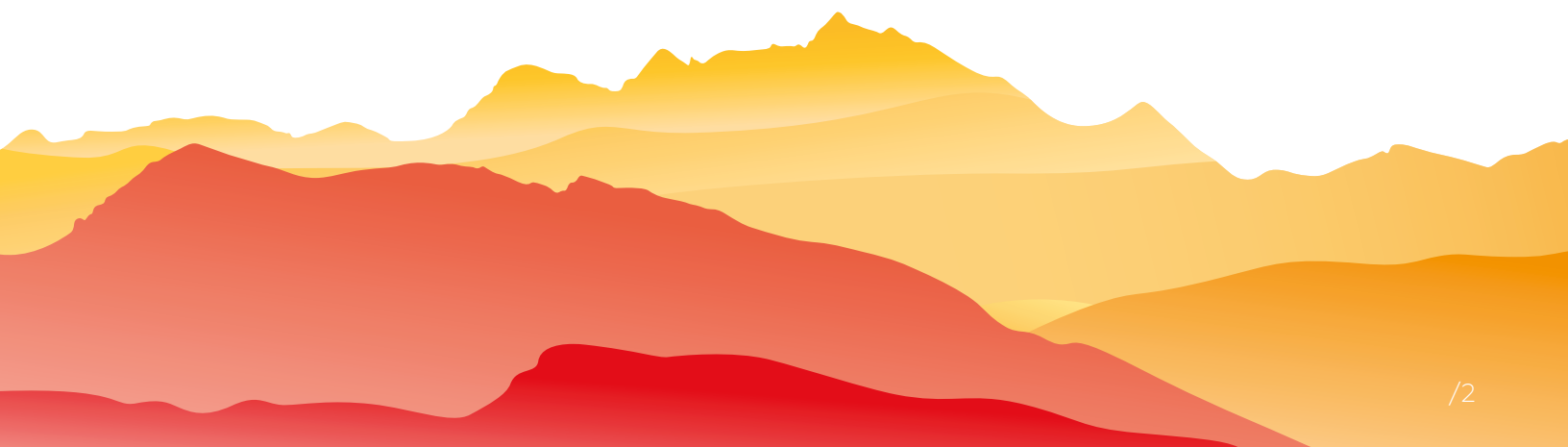
Executive summary

Every CIO today is focusing on Digital Transformation.

As data privacy and regulatory compliance concerns increase, companies are moving towards digital solutions. However, to fully benefit from this digital shift, they need a holistic solution that caters to all aspects of their business. Businesses need the ability to deliver a differentiated customer experience that leverages the power of artificial intelligence (AI) to turn disparate information stores into the knowledge that drives a deeper level of customer engagement. The Iron Mountain InSight® Digital Experience Platform achieves this goal, enabling the management and access of both physical and digital information throughout its entire lifecycle from a single location.

With Iron Mountain Digital Experience Platform, you can:

- Transition physical information to digital and continue to manage the digital information lifecycle
- Manage information consistently across channels via a single web-based portal
- Reduce time, effort, and costs to maintain compliance



InSight Digital Experience Platform transforms the information experience

A changing market demands a more comprehensive solution

Markets are more dynamic than ever before, and organizations need to be able to respond faster, with more efficiency, providing an enhanced customer experience. In today's world, information is king, and the ability to utilize an organization's data to drive decision making and accelerate responses is critical. Digital transformation is the key to unlocking the value of an organization's data, which is why 90% of companies have engaged in digital transformation initiatives or at a minimum developed some type of digital transformation strategy.¹

In digital transformation there is a distinct need for intelligent document processing (IDP) to feed the systems that will drive the insights. IDP requires the ability to handle not only digital documents, but also physical (i.e., paper) documents to deliver a complete repository of information that can be integrated into applications and workflows. But IDP is only a single component of an overall digital transformation strategy. Another key element to leverage these massive information collections is a workflow automation platform that can seamlessly integrate the information directly into the workflow, empowering employees to drive faster resolution, boosting the overall customer experience.

To address this need in the market, Iron Mountain developed the InSight Digital Experience Platform (DXP). Iron Mountain InSight DXP is a scalable, low-code software-as-a-service (SaaS) platform that ingests and processes unstructured content and can integrate with key business processes, workflows and systems through standard application programming interfaces (APIs). As a modular platform, InSight DXP integrates the key components that digital transformation demands - physical and digital content management, intelligent document processing, workflow automation, and information governance.

While most of the data being created today is digital, the key concern for most organizations is still the physical asset management of their information as the processes and policies around paper documents create an unacceptable blind spot in relation to retention and regulatory concerns. Any platform that addresses digital transformation must tackle the more difficult job - physical information - along with the requisite handling of digital information.

InSight DXP delivers an automated and intelligent ability to digitize physical documents (through high-speed scanning support), enabling it to be integrated into information repositories, along with the vast amount of digital information that is being generated daily by organizations. Regardless of the format or system, InSight DXP can be customized to an organization's exact needs, enabling process transparency, insightful dashboards, and customizable workflows and reporting to match an organization's specific needs.

With compliance being a major concern across all organizations in both the public and private sectors, InSight DXP delivers the capability to systematically manage and enforce defensible records retention rules and privacy obligations for relevant content through integration with the Iron Mountain Policy Center solution.

InSight DXP use cases

As nearly every business or organization is collecting data today, the next step to embracing digital transformation is achieved through the enablement of a digital platform that enables the business to integrate their massively scaling data stores directly into their workflows and processes. InSight DXP is built around the complete asset lifecycle and businesses today are utilizing this flexible technology to drive their objectives, creating greater efficiencies for their workflows.

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

Digital mailroom

For years, businesses sent and received documents via both physical mail and electronic mail, and these two worlds rarely ever met. Maintaining a consistent - and most importantly, unified - record of correspondence with individual customers or organizations was difficult, if not impossible.

A digital mailroom is the automation of both physical and electronic communications, encompassing the incoming and outgoing message streams. With a Platform like InSight DXP, organizations can not only bring all these disparate sources together, but also apply the proper governance based on the document contents, audiences, and other important considerations. Document retention moves from a cumbersome and disjointed process into an easily defensible strategy that reduces risk in the same way that it reduces cost.

Digital pathology

The primary goal of pathology is to identify and understand the causes and effects of diseases or injuries. Digital pathology is a specialized branch of the overall pathology discipline that focuses on the use of electronic (digital) files to accelerate the processing of samples. With a heavy emphasis on digitized specimen slides, there is a tremendous opportunity to accelerate findings and drive to root causes of existing diseases or maladies, potentially even identifying novel afflictions in the process.

Digital pathology can lean into AI and machine learning to help identify and classify these digital images, but there is so much more patient information collected outside of the actual digital image being examined that will need to be a part of the overall analysis. With InSight DXP, the ability to marry the patient information and demographics with the actual sample slides gives researchers powerful tools to connect the dots more broadly, at a much more rapid pace. The low-code environment of InSight DXP removes the need for specialists to create large, complex models that may miss critical pieces of data that may potentially delay the journey to the root cause.

HR contracts

Human Resources (HR) management is growing rapidly in complexity. The costs and risks associated with non-compliance are driving organizations towards HR automation, but this automation is complex and requires very complex information sets. Today, HR organizations spend too much time in the collection and reporting of data and less time helping organizations grow and adapt to the latest organizational challenges. This equation needs to be flipped.

There is an ever-increasing amount of data about individuals that is required to be both collected and securely stored. With a digital platform like InSight DXP, the physical and electronic documents associated with organizations and employees can be collected, managed and retained, integrating key information into the overall HR workflows to drive better efficiency and employee satisfaction. The comprehensive integration of many types of data helps to minimize risk and ensure compliance in today's complex and litigious environments.

But InSight DXP is not just limited to just these areas. Any organization dealing with information, be it digital or even physical, can take advantage of the platform. Deployed as a low-code/no-code platform in either an on-premises manner or as a cloud (software-as-a-service) solution, InSight DXP can be deployed quickly and scale with your organization and its unique needs.

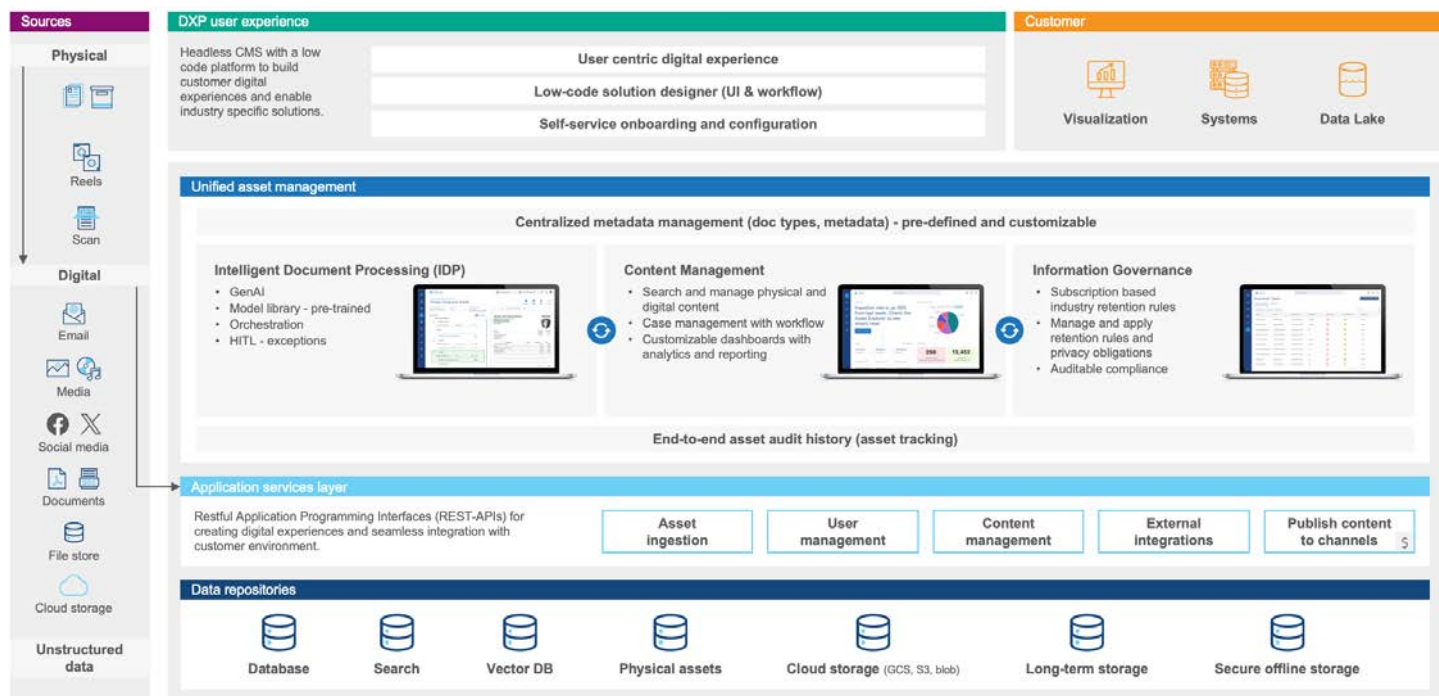
Major DXP components

Within the Iron Mountain InSight DXP platform is a complete set of components that are crucial to enable the effective management of data throughout its full lifecycle.

The complete InSight DXP ecosystem encompasses the sources of data, customers, workflows, processes and all the components that drive a complete, automated document lifecycle.

The first step of the process is **Digitization**, the conversion of physical documents into the system (electronic assets are brought in through a content management component.) Iron Mountain has a long

The Iron Mountain InSight Digital Experience Platform ecosystem



history as a leader in information management; our comprehensive services include a massive fleet of secure trucks for document transport along with state-of-the-art scanning centers located in practically every geography around the world. Our services offering delivers a full chain of custody to ensure that information stays secure, addressing both privacy and compliance concerns resulting in a fully defensible process. Physical assets such as paper, tapes, reels, microfiche, or microfilm can be brought into the system where they are classified and defined, extracting metadata through optical character recognition. Digitization can occur at either the customer location or through any of the Iron Mountain high speed scanning centers.

The second component in the platform is **Content Management**. Iron Mountain InSight Content Management System allows you to consolidate and manage all your documents in one place. This includes physical documents that have been digitized, as well as electronic documents from various sources such as S3, FTP, among others. This unified pool of documents can then be easily managed and utilized as needed. The ingestion of this high volume of information can be scheduled and handled simultaneously from multiple sources, maintaining a full audit history throughout the entire process. This highly scalable content model is flexible and can scale up or down as needs demand, all searchable via a NoSQL database and a highly

available search engine. Users can search, view, edit, share, download, and group assets, utilizing a pluggable document viewer or integrating the content directly into their existing workflow tools through standard APIs.

The headless content management design separates the user interface from the repository, enabling a custom low-code / no-code user interface that can be easily aligned to the organization's lexicon and workflows with the ability to build components in one location and then deploy them globally. Managed through a "single pane of glass", administrators have a view into both physical and electronic assets along with the workflow processes and user interactions. The addition of GenAI extends the low-code environment bringing the latest applications for intelligent document search, summarization, risk identification and classification based solely on the customers' specific documents.

Workflows can be enhanced with rules-based automated document routing, a custom low-code forms designer, case management that can vary by industry or even customer, as well as an automated process for exception handling and validation. Our Human in the Loop technology enables companies to insert the right human elements into the right spots in the workflow to help ensure the highest levels of consistency and quality in the process.

With all the documents now being brought into the system from the workflows, **Intelligent Document Processing** takes place. Iron Mountain Intelligent Document Processing (IDP) is designed to classify documents and extract their information utilizing AI. With a full library of pre-trained models as well as the ability to build custom models, organizations can lean into the established structures of their industry or innovate off those standards to create models that more directly reflect their specific workflows and processes. Through a self-service model that features a low-code/no-code development methodology, document processing can be customized by the people most familiar with the workflows and data requirements, there is no need for expensive data scientists to build out rigid and complex processing models. Through support of large language models (LLMs), Iron Mountain IDP enables organizations to train their data, building custom prompts that leverage the power of AI to automate the document processing tasks. Once built, these models can be used independently within IDP or as part of a larger content services platform or other content management program.

The collection and processing of documents brings inherent risks to organizations; as their repositories scale up, their exposure increases exponentially. This is where **Information Governance** comes into play, providing a systematic and auditable system for ensuring that the entire document lifecycle is protected, minimizing the risk to both the company and its customers. Information governance enables the organization to manage and apply the appropriate retention rules, helping to ensure that privacy and compliance obligations are being properly addressed. As rules and regulations change over time, especially with respect to individual geographic regions, Iron Mountain's global research database can help ensure that customers are kept abreast of all the latest developments and requirements, minimizing their potential exposure through defensible retention rules. Shared taxonomy across the system enables the automatic enforcement of retention rules and a full audit history is available indicating any interaction at the document, application, group, or even user level.

Now, with all these pieces in place the final component, the **Low-code Solution Designer / Packaged Solutions** provides the crucial linkage, enabling the organization to fully integrate document lifecycle management into their enterprise environment. The solutions enable both user interface and workflow design to be easily

developed through intuitive drag-and-drop interfaces that remove the need for expensive resources to build complex, custom code to handle these functions. Solution templates for many industries already exist, enabling an out-of-the-box opportunity for immediate productivity gains or to act as the basis for simple modifications that bring the models in line with an organization's exact needs. The self-service model includes metadata document types, customer onboarding, and dashboards, enabling an organization to immediately take advantage of the system. Case management is flexible and each of the industry models can be optimized to the specific needs for the data and workflows of the organization. All these different capabilities enable organizations to automate the ingestion of data into the system as well as the workflows where it can then be categorized, organized and begin its lifecycle within the company.

Key features of InSight DXP

Iron Mountain InSight DXP is designed to deliver a full lifecycle document and information management platform that encompasses both physical and digital documents.

Key features of the platform include:

- Integration with digital scanning and physical document handling processes/tools that enable organizations to transition physical information to digital and continue to manage the digital information lifecycle
- Workflow automation throughout each of the main components to improve efficiency and boost productivity for users and administrators, enabling them to manage information consistently across channels via a single web-based portal
- Self-service platform that empowers users and boosts productivity, reducing time, effort and cost, all while maintaining compliance
 - Automated onboarding and provisioning (multi-tenant) to bring users up to speed as quickly as possible
 - Single sign on (SSO) that assigns access and document rights based on existing organizational authentication (e.g., Microsoft Active Directory, etc.)

- Self-service user, document type and metadata management that empowers knowledge workers to bring workflow attributes directly into the system
 - User document upload that enables users to add to repositories based on their roles and access levels
 - Ability for organizations to try the platform quickly and easily to assess fit and function for their specific tasks and workflows without the need for a lengthy and overly complicated proof of concept process
- Designed around a low-code /no-code environment that enables users to create powerful automations without requiring specialized coding skills or data scientist capabilities
 - A full set of integrations, APIs, and connectors that enable the system to easily integrate into leading enterprise platforms
 - Integration with customers' enterprise systems like Enterprise Resource Planning (ERP) (e.g., SAP), Customer Relationship Management (CRM), Business Intelligence (BI), Patient Health Data (e.g., Epic), Records Management (e.g., Iron Mountain Safe Keeper Plus, O'Neil), Digitization (e.g., Kofax) systems and more
 - Integration with customer data lakes or other data repositories including cloud-based data stores
 - Continuous operations monitoring with dashboards, reporting, and real-time asset tracking
 - A shared metadata model that enables create once, use many methodologies that drive efficiency
 - Standard document types that enable creation of taxonomy for retention rules
 - Extract data for different document types using AI models, leveraging standard industry models that can also be customized for company specifics
 - Enhanced enterprise-grade security
 - Role-based access controls that enable administrators to assign document controls at the group, department or even user level
 - Metadata security access controls that regulate who can see or edit sensitive information based on document type or metadata fields
 - 256-bit encryption covering data both at rest and data in transit
 - Certifications that help ensure compliance with major standards bodies or initiatives like ISO, FedRAMP, SOC 1 & 2, HIPAA, GDPR and more
 - A variety of flexible storage options including cloud (AWS, GCP, Azure), archive (cold storage) and Iron Mountain's own Iron Cloud, a multi-tier data storage approach to better protect, preserve, and unlock the full value of your data

How InSight DXP drives unified lifecycle management

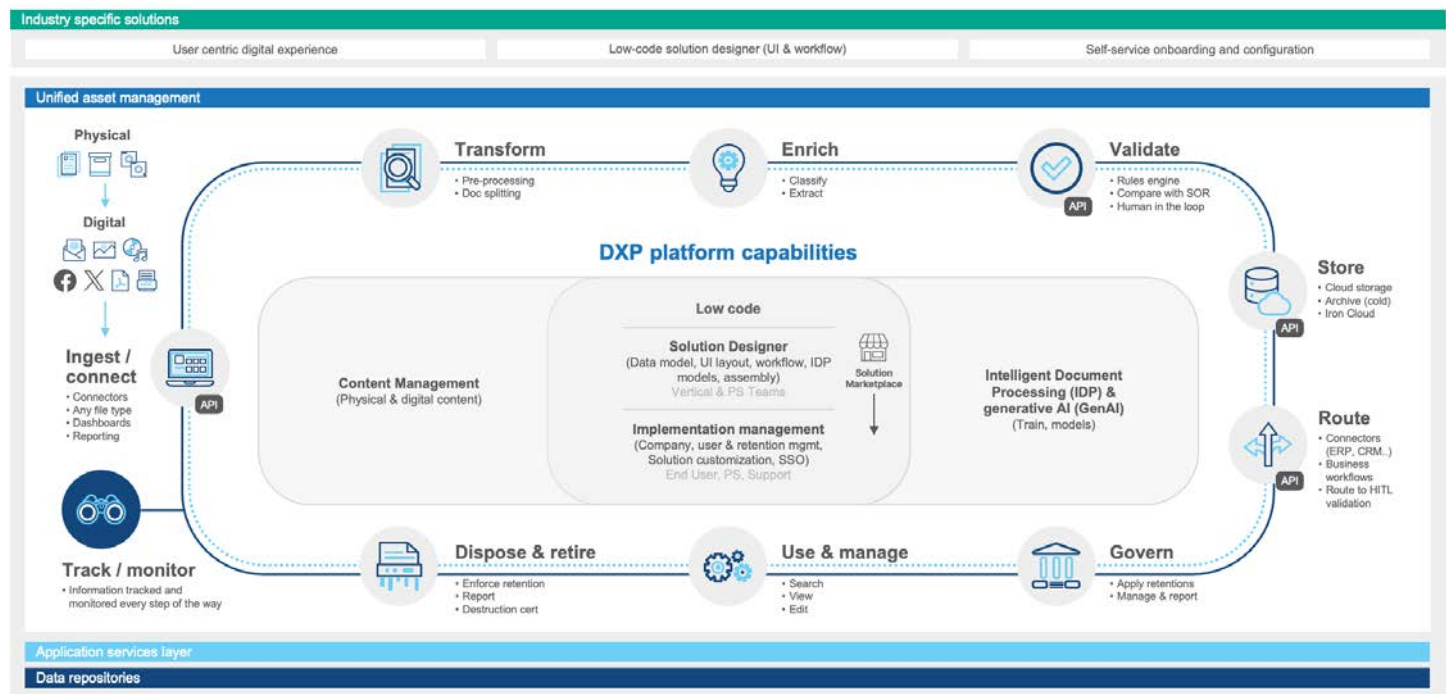
Documents have a full lifecycle, from creation to destruction. The lifecycle begins with creation in all instances, but the management, handling, access, and eventual destruction is less specific in most cases, creating risk and liability for organizations due to a less than fully defensible document management process. Digital creation and retention of documents has exacerbated this document management challenge as duplication and distribution can often happen unchecked, leaving organizations exposed.

As digital transformation becomes the norm and organizations move to a fully automated document processing and management environment, delivering unified lifecycle management is the best way to both drive productivity and lower exposure for organizations. Iron Mountain InSight DXP is engineered to deliver this unified lifecycle management.

The process begins with the **ingestion** of documents into the system. Physical documents are scanned or otherwise digitized into electronic assets that can be more easily tracked and managed. Digital assets are connected to the system through access to a variety of storage repositories. By bringing physical and digital assets together, the system creates a single, holistic entity that enables every asset to be tracked and monitored throughout its entire lifecycle.

The next step is the **transformation** of documents. In previous implementations of digital document management, the goal was simply to store and access

The unified lifecycle management process



documents, meaning that if a document contained both a contract and invoice it would be stored as a single entity. In the transformation phase that is now available through InSight DXP, this document is split into its two composing entities and each is handled differently according to the rules established in the system. Any pre-processing that needs to occur to clean up documents and information is also handled at this stage as well.

Once transformed, the documents can now be **enriched**, where the metadata is created. The documents are classified based on the data models of the organization and the text of documents can be extracted. This step is crucial as the higher-level metadata that is being created in this function will fuel the AI capabilities of the system.

After enrichment, the **validation** of documents can begin. The InSight DXP platform includes a rules engine that validates the document against established rules to ensure compliance as the document enters the system, establishing the parameters for the handling and the eventual removal from the system. Documents are compared against the current system of record to ensure the compliance and consistency that that organization demands. Iron Mountain's innovative "Human in the Loop" capability enables documents that fall within a range of parameters to be flagged and reviewed by users with explicit knowledge of the workflows and information models, boosting the overall accuracy and consistency of the process.

Once validated, the documents can now be **stored** across a wide variety of mediums and locations. Any document stored in multiple locations is linked in a manner that optimizes storage capacity and enables the tracking across the document lifecycle to adhere to the rules established for the organization. Cloud storage in Amazon Web Services, Google Cloud Platform or Microsoft Azure is available, as well as the fully integrated connection to the Iron Mountain Iron Cloud. Archival to cold storage is also available across the system.

But the goal of InSight DXP is not to just store these documents, the true power of the system comes out when the stored data can be accessed by the users and applications that demand this information as part of their daily tasks, so integrating the information into an organization's workflows is essential. Through connectors to major enterprise platforms like ERP, CRM or HRMS systems, InSight DXP enables the **sharing and routing** of information within all the systems that businesses utilize to power their enterprises.

Governance is an important part of the overall lifecycle, ensuring that document handling, storage and routing all fall within the established guidelines for the organization. Retention rules are applied to each document, ensuring that documents are retained in accordance with any legal compliance guidelines, and are, most importantly,

removed from the system as they fall outside of these retention guidelines.

Use and management of the documents, integrated into workflows, becomes the focal point of the system. Based on defined access rules at the organization, department, workgroup, or even user level, documents can be searched and viewed from within the applications that users work in all day long, removing the need for task switching to access the data needed to complete workflows. Editing of documents is supported based on organizational and governance rules, with a full revision history tracking and logging.

When documents have reached the end of their mandated lifecycle due to either the organization's procedures or established legal guidelines, they can be **disposed or retired**, removing them from the system so that they are no longer accessible by users or applications. Full reporting on the disposition and retirement of information is supported by InSight DXP. In cases where regulations require documented evidence of the destruction of information, a destruction certificate that validates the removal of information from the system and guarantees no further accessibility by the organization can be issued.

Unlike traditional document management systems, the InSight DXP platform handles all the tasks for unified lifecycle management, handling all the steps and maintaining full accountability along every step in the process.

Decide for yourself

To understand the power of the Iron Mountain InSight Digital Experience Platform, it is best to try it first, most importantly, with your 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 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

Digital Transformation is a significant direction that practically every organization, public or private, is grappling with today. With large amounts of both physical and digital documents to manage, organizations need a system that can do more than just pull this information together into a repository, they need a platform that will handle the full lifecycle management.

The Iron Mountain InSight Digital Experience Platform (DXP) empowers organizations with a full suite of capabilities to handle the complete lifecycle of the information that drives their businesses and delivers outstanding customer experiences. As a leader for decades in document and information management, only Iron Mountain can deliver 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. This modular platform enables organizations to quickly build solutions with physical and digital content management, intelligent document processing, workflow automation and information governance capabilities.

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 95% 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.

¹ Source: <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/rewired-to-outcompete#>



800.899.IRON | [ironmountain.com](https://www.ironmountain.com)

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.

© 2023 Iron Mountain, Incorporated and/or its affiliates "Iron Mountain". All rights reserved. Information herein is proprietary and confidential to Iron Mountain and/or its licensors, does not represent or imply an invitation or offer, and may not be used for competitive analysis or building a competitive product or otherwise reproduced without Iron Mountain's written permission. Iron Mountain does not provide a commitment to any regional or future availability and does not represent an affiliation with or endorsement by any other party. Iron Mountain shall not be liable for any direct, indirect, consequential, punitive, special, or incidental damages arising out of the use or inability to use the information, which is subject to change, provided AS-IS with no representations or warranties with respect to the accuracy or completeness of the information provided or fitness for a particular purpose. "Iron Mountain" is a registered trademark of Iron Mountain in the United States and other countries, and Iron Mountain, the Iron Mountain logo, and combinations thereof, and other marks marked by ® or TM are trademarks of Iron Mountain. All other trademarks may be trademarks of their respective owners.

