Industry Watch

Electronic Records Management
- still playing catch-up with paper
About the Research

As the non-profit association dedicated to nurturing, growing and supporting the ECM (Enterprise Content Management) community, AIIM is proud to provide this research at no charge. In this way the education, thought leadership and direction provided by our work can be leveraged by the entire community.

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Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken by 768 individual members of the AIIM community between July 30th and August 18th, 2009, using a Web-based tool. Invitations to take the survey were sent via e-mail to a selection of the 65,000 AIIM community members.

Survey population demographics can be found in Appendix A. Graphs throughout most of the report exclude responses from organizations with less than 10 employees, and suppliers of ECM products or services.

Terminology within records management is subject to some variation. In particular we refer here to paper records and physical records in a largely interchangeable way.

About AIIM

AIIM (www.aiim.org) is the community that provides education, research, and best practices to help organizations find, control and optimize their information. For more than 60 years, AIIM has been the leading non-profit organization focused on helping users understand the challenges associated with managing documents, content, records and business processes. Today, AIIM is international in scope, independent and implementation-focused, acting as the intermediary between ECM (Enterprise Content Management) users, vendors and the channel.

About the Author

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Introduction

Electronic Records Management (ERM) was originally developed as a stand-alone application, frequently managing physical items as well as electronic documents. It has subsequently become one of the key elements of any integrated Enterprise Content Management (ECM) implementation. It is the robust cornerstone underlying compliance and legal discovery, which increasingly call for electronic documents to be treated in the same way as paper documents. For this report, we have compared policies and effectiveness between the management of electronic records and that of traditional paper. Legal-discovery and litigation-hold have created a demand for specific e-discovery tools, so we look at their take up. We have also looked at the integration issues across multiple records repositories and measured long-term archive strategies.

Overall, our findings show that in most organizations, electronic records are still taken less seriously than paper records. Responsibility for applying good records management practice to electronic records would seem to reside in the IT Department rather than in the Records Department, and even where good policies exist, they are often not monitored or enforced. Having said that, an encouraging number of organizations are homogenising their electronic and physical policies and practices, and many are moving to an all-electronic model, linking their repositories together in order to improve the legal discovery process and enhance operational efficiency.

Key Findings

- The volume of paper records is still increasing steadily in 56% of organizations, but in 22% it is at last showing signs of decreasing. Meanwhile the volume of electronic records is “increasing rapidly” for 70%, and unsurprisingly, is not decreasing for any.
- Half of organizations are scanning newly received paper items and filing them electronically rather than manually, and a third of businesses are looking to go to all-electronic records-keeping.
- But for the other half, as well as manually filing inbound paper documents, 40% admit to routinely printing newly generated office documents and emails for the purpose of filing them as paper records.
- Electronic records are more than twice as likely to be described as “Unmanaged” than paper records.
- 71% of organizations have a procedure for legal hold of paper records in the event of litigation, but only 57% have one for electronic records.
- For 25% of organizations, legal discovery of paper records would take at least a month, whereas for electronic records this is 17%.
- There is a reliance on IT staff to carry out legal discovery on electronic records in the majority of companies, whereas records management staff or line-of-business staff deal with paper records.
- 13% of organizations are using dedicated e-discovery tools and a further 22% are planning to do so. 42% are utilising their ECM/ERM suites for e-discovery and 12% are using Enterprise Search.
- Of those organizations with no ECM/ERM system, 60% would not be confident, if challenged, that their electronic records have not been changed, deleted or inappropriately accessed.
- 38% of those polled admit that there is little or no enforcement of their records management policies and 55% set no guidance on dealing with important emails as records.
- 31% of organizations have 20 or more content repositories that could usefully be linked, with email as the highest priority content.
- 35% are using in-house developed links to join up repositories and a further 28% are using vendor custom-developed links. CMIS (Content Management Interoperability Services specification) has gained traction in just 15% of organizations as yet.
- Half of organizations would “possibly” store records in a local, identifiable outsource, but 77% state they would never use a public cloud (e.g., Google, Amazon or Microsoft) even if they were assured of an onshore storage location. However, 67% would consider a corporate or government cloud.
- Two thirds of organizations store a significant proportion of their records in native formats such as Word and Excel, although a third plan to converge to PDF-A over the next 3 years.
- Over 70% of organizations have made no plans or provision for long-term archiving of electronic records, with no policies for migrating to new media, translating formats, or virtualization of applications.
- Spending on Records Management systems and modules is expected to be up overall in the next 12 months. Consultancy Services show a slight net fall.
Paper versus Electronic

Despite the near universal move to electronic generation of documents, the volume of paper records is still increasing in the majority of organizations, although there are signs of stability in 23% and a decrease in 22%. Electronic records on the other hand are “increasing rapidly” in 70% of organizations, with none reporting any kind of slowing down.

Figure 1: Is the volume of your paper/electronic records: N=656

When asked about the degree of management that exists for paper and electronic records, around half of companies admit that even with their paper records, a significant proportion can be considered to be unmanaged. On the whole, however, electronic records are more than twice as likely to be unmanaged, with 44% reporting that the majority of their electronic records are unmanaged, compared to 21% for paper.

Figure 2: What proportion of your records would you say are unmanaged? N=648

As regards how paper records are managed, the highest scores go to manual management either in-house or in off-site warehouses. Of those that do manage their paper records electronically, they are as likely to be indexed in dedicated systems as to be indexed alongside electronic records in a combined system.
When asked in more detail about management of electronic records, “managed in file-shares” scores highly – albeit that many would consider a file-share to be a somewhat unmanaged environment. Numbers are equally split between those with dedicated ERM systems and those using the records management component of ECM systems (including SharePoint).

Exploring those records produced by line-of-business (LOB) applications, we find around one third are likely to store them within the application - where they may or may not be readily searchable and lifecycle managed. A further third are printed and managed as paper, with the final third managed externally in a dedicated RM system or as part of an ECM system.
Some organizations are making good progress towards eliminating their paper records, with over 50% reporting that they generally scan newly received items and file them electronically. 29% are scanning paper records if they are pulled from the archive and 30% have a project to scan all of their paper records over time.

However, it is little wonder that the volume of paper records is still increasing given that 38% print off electronically generated documents are printed off for the purpose of filing them as records. Emails in particular by 44% of respondents. The fact that a third of organizations feel that paper records are required for audit purposes suggests that there is much education still to be done, particularly amongst the audit community themselves.

We can report good progress towards elimination of paper records in over a third of organizations, but in the remainder there is still a lack of appreciation that important electronic documents can and should have status as records and need to be retained as such. Where this is recognized, there is still a strong tendency to print them off and file them as paper.
Legal Discovery

The US FRCP amendment in 2006 clearly set down that electronic documents and emails were just as liable to pre-court disclosure as paper documents, and there are similar rulings in case law across most of Europe. This presents the records manager with two requirements: a legal discovery process to find out what relevant documents exist, and a legal hold to ensure that those documents, once found, cannot be deleted or altered.

Interestingly, 57% claim to have a legal hold procedure for electronic records, albeit that this is 14% less than the 71% who have a procedure for paper records. Emails are down further at 53% and the difficulty here is well documented in the previous AIIM report “Email Management, the good the bad and the ugly”. Web pages would seem to present an even greater challenge, particularly one of context for dynamically generated pages.

When broken down by organization size, we can see that larger organizations have made considerable progress since 2006.

As regards the time taken to carry out a legal discovery process, 25% of organizations are allowing a month or more for paper records compared to 17% for their electronic records. This difference is less than we would expect, and perhaps...
reflects the fact that most electronic records are still living in multiple, unconnected repositories, as we discuss later.

![Figure 10: How long would a legal discovery search process take across your paper/electronic records: N=572](image1)

We also found that in most organizations, IT staff are being called upon to carry out the legal discovery process across electronic records, whereas Records staff deal with it for paper records.

![Figure 11: Who would be responsible for doing the legal discovery search across your: N=572](image2)

As regards automating the legal discovery process, 19% of the largest organizations are already using dedicated e-discovery tools or modules, with a further 31% planning to do so. Even amongst mid-sized and smaller organizations, 17% are planning an investment. Meanwhile, around 40% are using the functionality of their existing ECM or ERM system. Investment in Enterprise Search has so far been twice as popular in larger companies, with 19% adopting it.
As regards the tools you use for in-house legal discovery:

Finally in this section, we asked how confident respondents are that their electronic records would stand up in court. A worrying 37% are “not very...,” or “not at all confident.” This shows some improvement over the 44% result the last time AIIM asked this question in 2007. However, the 37% in this survey rises to 43% in organizations of over 5,000 employees. For organizations who have no records management or ECM system, it rises to 60%.

If challenged, how confident could you be that your electronic records have not been changed, deleted, or inappropriately accessed? N=572

The conclusion we draw regarding legal discovery is that electronic records lag once again as regards formal procedures. IT staff rather than Records Management staff are being called upon to carry out important legal procedures. However, for those records that are properly stored and indexed electronically, elapsed legal discovery timescales can be reduced. There is increasing interest in the use of specialist e-discovery tools to optimize this saving.
particularly from larger organizations.

Governance

Good records management is a combination of policies, systems and enforcement, backed up by knowledge of appropriate standards and compliance with them.

Figure 14: What use is made of standards in your organization for best practice records management? N=520 (multiple)

Larger organizations show a slightly higher attention to standards, but the differences are much less than one might expect, and intriguingly, mid-sized companies appear to be the laggards here, particularly with regard to ISO 15489. MoReq2 seems to be achieving traction, with 21% of European organizations citing it, and a surprising 8% of those in North America.

Homogeneous policies across electronic and physical records will be easier to understand and therefore easier to enforce. We are encouraged that 45% of organizations claimed to have a single set of policies for both types, with a further 16% putting a reasoned case for differentiated policies that are matched to record type, complexity, location, etc.
Somewhat surprising, on the other hand, is the fact that 16% of respondents in organizations with over 5,000 employees admitted to having only very basic records management policies.

Perhaps somewhat less surprising, but still worrying, is that in 38% of organizations there is no real enforcement of the policies they do have.
When it comes to staff training on dealing with records, there seems to be little difference between paper and electronic, with nearly half providing no training on either. Although 62% have guidelines on what constitutes a record, only 46% have guidelines on how to deal with emails as records.

It is good to see that 36% set out to enforce a standard classification scheme or file plan across the organization, but coming to an agreement in the first place is a problem in many implementations, with 30% reporting it as a work-in-progress, or yet to be started.

We also asked about retention schedules, finding that 36% are applying them consistently across all formats. Interestingly, there was a noticeable difference of 55% who require approval for destruction of paper records at the end of the retention schedule, compared to 32% who require approval before deletion of electronic records. This may reflect the level of staff or the external warehouse procedures involved for paper records.

An important part of governance is authority, and we were interested to find out where the highest level of responsibility lay. The result shows quite clearly that no matter whether traditional responsibility for paper records resides with records officers, finance, legal or line of business, responsibility for electronic records is pushed firmly towards the IT department – or in 13% of organizations, to no one at all.
Figure 19: Which of the following would best apply in your organization as regards the highest level of records management expertise and responsibility for paper/electronic records? N=553

We also asked which direction records management responsibility was likely to head in 3-5 years time. There was a general indication that IT should take less responsibility, and that there should be more executive or C-level officers prepared to take on the responsibility and acquire the expertise. Beyond that it seems equally split as to whether it will become the responsibility of the Legal/Compliance department, whether it will be devolved to the line of business units, or whether it will stay split as now between Finance, Legal, Records and IT.

Figure 20: Which direction do you think Records Management responsibility is heading in, say, 3-5 years time? N=546

In conclusion, it is apparent that the traditional keepers of records are moving towards a common set of policies for electronic and paper records, albeit that enforcement is somewhat patchy. However, when it comes to setting
responsibility at the highest level, the traditional boundaries re-appear, with a heavy reliance on the IT department.

**Linking Multiple Repositories**

As we found in our State of ECM report earlier this year, although a third of organizations plan to migrate their multiple repositories to a single system, an equal number would prefer to link their existing systems together under a single sign-on and single-search portal. Ideally, they would like to achieve a “manage-in-place” scenario where consistent records management and retention policies can be achieved across all repositories from a central set of policies.

In this survey, we found that 20% of organizations have 50 or more repositories that “could usefully be linked or managed in one place”, and over half have 10 or more. The highest priority is to link email systems, followed by existing document and records management systems, and also outsourced storage.

![Figure 21: Which repositories would you like to link or manage in one place? N=479 (“Not applicable” eliminated)](image)

Given the range and diversity of current and legacy systems, linking is likely to present some difficulties, with 62% using or considering some form of custom development.

![Figure 22: Which connection mechanisms are you using or developing to link repositories? N=479 (multiple)](image)

Given the difficulties, therefore, it is surprising how few organizations have looked into the potential benefits of CMIS, the Content Management Interoperability Services specification standard. Fully compliant records management functions are not as yet available under the standard, but they are targeted for future incorporation. Further details of each of these standards can be readily found on the internet. Open Source is not, of course, a standard as such, but it obviously has applicability in this area.
As a measure of success of the manage-in-place concept, we found that 30% of organizations have achieved single sign-on and search across at least 2 repositories, and 15% have extended that to hold, delete, retention, deletion and destruction. A pioneering 5% have achieved all of those functions across 5 or more repositories.

Going forward, it is important to prevent the proliferation of separate repositories by integrating enterprise systems with the records management system. The traditional link is from document management and imaging systems, but it is important to be able to declare a record within the email client. Beyond that, in most organizations potential records are created in finance, ERP, CRM, HR and Line of Business systems. Increasingly relevant are also Instant Messaging and Enterprise 2.0 systems. It is apparent that direct integration with these systems is in its infancy.
In conclusion, we can say that there are active projects to link records repositories together in many organizations, and they are showing some success with the manage-in-place concept. However, the sheer number of repositories that exist in the larger organizations presents a challenge for integration software. Standards are moving in the right direction to help with this, but take up is low as yet.

Cloud and Long Term Archive

Archiving records in the cloud is probably one of the severest tests of one’s faith in the security and long-term availability of this concept. By “cloud”, we mean management and storage of records, off premise, and on an un-specified server.

We found that 54% of organizations would “possibly” store records in a local, identifiable outsource. But 77% state they would never use a public cloud (e.g., Google, Amazon or Microsoft) even if they were assured of an onshore storage location. However, if the cloud were provided within the corporation, confidence levels in the commercial sector would rise to 67%, and to 71% for a government organized cloud within the public sector.

Figure 25: In view of security considerations, would you store electronic records in any of the following:

In order to explore long-term archiving policies for electronic records, we first asked what the range of retention periods were. As can be seen, over 60% of all organizations are required to keep some of their records into the foreseeable future, even within the non-government sector.

Figure 26: Do you have electronic records which need to be retained for: (multiple)
Surprisingly, therefore, when we asked about policies and budgets for migration to updated media, translation to new formats, and coping with obsolete applications, 68% of organizations had no policy on any of these options. There was a slightly higher awareness of media migration and application obsolescence than of format translation. These results were consistent across both public and private sector.

![Figure 27: Do you have a policy/budget for: (multiple)](image)

We also asked about what formats were in use both within the existing archive, and for newly archived records. Over 60% of organizations admit to storing a significant proportion of their electronic records in the native application format such as Word or Excel.

![Figure 28: Do you store a significant proportion of your records in the following formats? (Multiple)](image)

Noting the slight increase in use of PDF-A (the open version of PDF optimized for archive), we asked if organizations have a plan to converge to PDF-A. We found that 8% already have, a further 28% plan to in the next 2 years, and a total of 54% will have done so within 5 years – a slow but positive movement.

Overall, therefore, we conclude that the battle being fought now is to bring electronic records into the records management regime. The issues of long-term archiving have largely been put on the back-burner for now. However, the number of organizations storing records in native application formats is of some concern. As regards storing records in the cloud, there is less resistance to the technique itself, more a lack of trust of using an external supplier, no matter how re-assuring the brand.
Implementation Issues and Spend

In our previous surveys, we have found that the drivers for records management investment are generally around the potential cost of failed compliance and the efficiency of litigation preparation. The litigation aspect is frequently considered from the negative viewpoint of successfully defending a case, but rapid production of related documents and records can significantly improve the success rate of pro-active legal action. Over and above that, there is an incentive to capture records electronically as part of improving corporate knowledge management and user access.

Records management systems can only improve compliance if they are used correctly. We asked users for their views on encouraging user adoption. They reported a balanced approach between making it easy to use the RM system, and making it harder to store documents elsewhere on local drives, file-shares and removable devices. Over and above that, regular training is considered a must.

Figure 29: Which four of the following would you say are the most important for encouraging user adoption of Records management? (multiple)
Finally, we asked users about their spending plans for the next 12 months.

Figure 30: How will your spending on Records management in the next 12 months compare with the previous 12 months? N=470 (“We don’t spend anything on this” eliminated.)

We see that net spending over the next 12 months is likely to be up in all areas except consulting services. Our other surveys this year have indicated maintained spending on software licences in most other areas of ECM, but a disappointing cut back in training. As regards records management, however, there seems to be a strong appetite for paid-for training. Interesting to note a continued spend on electronic systems for managing physical records, and strong representation of both Enterprise Search and Legal Hold.
Conclusion

The survey clearly shows that the spectrum of applied practice in electronic records management is now broader than it has ever been. There is a growing core of high-maturity organizations, representing 10 to 15% of our sample, that are removing paper from their business, have best-practice procedures aligned to standards, are linking their electronic and paper repositories together under common rules, and have a view to the long-term archive issues. At the other extreme there are still organizations, including quite large ones, who have rudimentary practices even for paper records, and simply no view that electronic documents and emails might represent records in any way, both as information assets and as potential liabilities.

In between these two extremes, there is a definite sense that in most organizations electronic records are playing catch-up. Compared to paper records, they are less rigorously managed and maintained, by less well-trained staff, and with less confidence in their authenticity were it to be questioned under litigation. The volume of paper records is still increasing, but much less so than electronic records. Responsible for much of the increased volume, emails might be considered a special case. But treating important emails as records and providing easy access to a suitable repository is crucial to maintaining a reliable and complete record set. At a much lower volume, but still important to include, are records generated within other enterprise applications and line-of-business systems.

We have found encouraging signs of continued investment in records management systems, both for electronic records and as electronic management of paper records. Electronic Records Management also seems worthy of specific training, with extra spend indicated here. The more recent developments of dedicated e-discovery and legal hold applications seem to be in tune with user demand, particularly in the larger organizations.
Survey Demographics

Survey Background
The survey was taken by 768 individual members of the AIIM community between July 30th and August 18th, 2009, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members.

Survey Demographics

Organizational Size
Survey respondents represented organizations of all sizes. Larger organizations over 5,000 employees represented 31%, with mid-sized organizations of 500 to 5,000 employees at 39%. Small-to-mid sized - 10 to 500 employees - were 29%. Organizations of less than 10 employees were excluded from all of the results.

Industry Sector
Local and national government made up 32%, finance and insurance 12%. Utilities oil and gas also 12%. The remaining sectors were evenly split. To avoid any bias, consultants and suppliers of ERM were removed from the report.

Geography
US 61%, Canada 12%, UK and Ireland 13%, mainland Europe 5%, rest-of-world 10%.

Job Function
Just over half of respondents were from Records Management, with nearly half as Head of Records, Compliance or Legal. IT made up 19% and project management, analysts and consultants 17%.
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About AIIM
AIIM (www.aiim.org) is the community that provides education, research, and best practices to help organizations find, control, and optimize their information. The AIIM community has grown to over 65,000 professionals from all industries and government, in over 150 unique countries, and within all levels of management including senior executives, line-of-business, and IT.

For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire enterprise content management (ECM) industry - including users, suppliers, and the channel - acts as the industry’s intermediary.

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