



## Hybrid Systems

Even as more and more companies attempt to go paper-free, it is not always possible to remove paper files from the records. This is how hybrid systems become necessary. Hybrid systems carry their own complications and limitations, but awareness of the potential pitfalls will help prevent problems before they begin and allow you to design the most efficient system to manage and maintain records effectively.

### **Routine Processes**

Routine processes are based on repetitive activities and exist in both paper and electronic format. For example, an application process might include a paper application and along with electronic communications. In a paper-based system, the email would be printed and kept with the application. In an electronic records system, the paper application would be scanned and saved with the email. In the hybrid system, this process would require the development of chosen guidelines based on office needs. For example, in an organization where various employees need to access the information, they might require the application be scanned. Regardless of which method is chosen, try to keep all of the process steps documents in a single location.

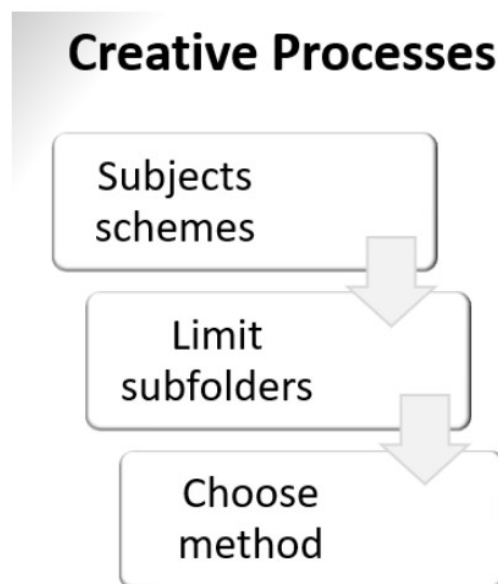
It is important to cross-reference material whenever possible. When the original, paper application is saved, for example, a note should be made that it is available in the paper record. The same is true of any relevant metadata available. Different programs and applications assist in the management of routine processes in hybrid systems.

### **Creative Processes**

Creative steps lead to creative processes. Creative processes are common in artistic fields, but they can also be special projects such as architecture design or developing new programs or software, and they will have their own unique set of actions.



Using creative processes in hybrid systems can be complicated. Physical documentation may be easier to manage in some instances, such as printed media. When both systems are used, the best option is to choose subject schemes and groupings to avoid confusion. When electronic records are implemented, try to keep the subfolders to a minimum. Regardless of whether the records are routine or creative, choose an official record method. For example, if most of the documents will be housed in a paper system, the paper record is the official record.



## Design

When electronic records are the standard of an office, there is no need to keep paper file cabinets. Although rare, a paper-based system will require file cabinets, but there is no reason to keep any record management software systems on the computers. In hybrid systems, you will need the resources for both.



- Open Access
- Accessed but not Removed
- Removed by Designated Employee Only
- Looked at Under Supervision

There are different items required:

- File cabinets
- File folders
- Paper
- Printers
- Labels
- Computers
- Shared drive
- Software for electronic management
- Database

The list above is just an overview. Once the equipment is in place, clear rules outlining storage and access must be made.



Paper records should be stored in a chosen location or locations, and access designated:

- Open access
- Records can be accessed but not removed
- Records can be removed by a designated employee
- Records are looked at under supervision

Access to electronic records can be limited or expanded based on the system and needs of the user. For example, it can be limited by the department.

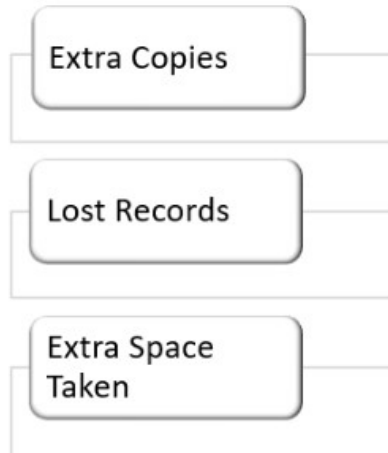
## **Limitations**

Hybrid record systems can be problematic. There is the risk of multiple copies of documents being saved even when clear guidelines are in place. Excess paperwork can cause confusion, particularly when the records are being purged or archived. Additionally, there is the risk of some documents not being filed at all do to miscommunications.

Besides the possible confusion of hybrid records, they also take up valuable space in the office, especially when multiple copies of documents may be lying around. Even with clear policies in place, there is still the need for extensive education for employees to use hybrid systems correctly.



## Limitations



### Review Questions: (Refer to Audio or Video files for correct answers)

- 1) What is necessary in hybrid systems?
  - a. Cross-reference
  - b. The contract is changed
  - c. It is in red
  - d. It is struck through



- 2) What should be kept in a single location?
  - a. New clauses
  - b. New contracts
  - c. Process steps
  - d. A conclusion
- 3) What is easier for managing creative record processes?
  - a. Electronic
  - b. Paper
  - c. Hybrid
  - d. They are all the same
- 4) What is necessary when creative processes are implemented in electronic records?
  - a. Expand the number of subfolders
  - b. Link metadata
  - c. Use an index
  - d. Limit the number of subfolders
- 5) How many methods for accessing records are there?
  - a. 4
  - b. 9
  - c. 5
  - d. 7



- 6) What is needed in a hybrid system?
- a. File cabinets
  - b. Shared drive
  - c. Printers
  - d. All of the above
- 7) What is necessary to ensure hybrid systems are used correctly?
- a. ERM
  - b. Processes
  - c. Policies
  - d. Training
- 8) What does excess documentation create?
- a. Official copies
  - b. Confusion
  - c. Access
  - d. Nothing
- 9) What tool did they use to collect information?
- a. Functional analysis
  - b. Index
  - c. Surveys
  - d. All of the above



10) How long had they been integrating changes?

- a. 3 years
- b. 1 year
- c. 6 months
- d. Unknown