

How Easily Managed Document Control is a GoldMine For Business

Wendy Collett

Seahorse Data
FrontRange GoldMine Solutions Partner

What is Document Control?

- The process by which we arrange our documentation to be
- **created, saved, recorded and distributed**
- in such a way as to be able to determine the status of any document.

What Does That Mean?

- Document control means different things to different people, especially with multiple roles within an organisation.

Meanings for QA Staff

- This would involve a full document control system, perhaps involving a database of documents, entering data details on each procedure, including:
 - Document ID
 - Distribution/Copy Details
 - Version Details
 - Status of Documentation

Meanings for General Staff

- This involves all documents that are both created and received by the staff, and knowing these things about them:
 - Location of documentation
 - Format of documentation
 - Access to the documentation
 - Status of the documentation

Types Of Documentation

- Documentation can take many different formats:

Computer Files

Paper Files

DOCUMENTATION CONTROL

= DATA CONTROL

Attachments

Reports from Databases

Budgeting For Document Out-Of-Control Systems

- On average each staff member spends up to 30 mins each day finding documents in many businesses.
- **That adds up to 3.4 weeks every year wasted per staff member!!**
AND you have already budgeted for it!

Imagine recovering this amount and reinvesting it in your business, because you change your document management habits!

Do You Have Total Control?

- Controlling all documentation and data within a company is a great idea, however rarely practical to have total control over every single document and data entry.
- A degree of control has to be determined for the different types of data, a level which makes practical sense and financial sense, both now and in the future.

Basics of Data Control

- **Documentation = Data**
- When you consider this statement carefully in relation to your computerised data and documentation, you will soon determine that your data is spread out in multiple locations, over multiple programs, often with no logical cohesion binding related information together.

Computer System Structures

- Consider computers and networks: To start with you need a comprehensive, easily managed file structure to assist with the storage of documentation and data.
- Depending upon your company's requirements, this could be further broken down into department structures etc.

Managing The Computer Data

- When considering directory structures, also consider these:
 - Backing up of data
 - Filing/archiving old data
 - Levels of access to the data
 - Computer network user rights to documentation.

And the most important

- **How Easily Can You Find The Data Later?**

Document File Formats

- Documents will not always be of the same type, when stored on computers. Produced by different programs, they will be in multiple formats such as:
 - Word processing/text docs
 - Spreadsheets
 - PDFs
 - Graphics
 - Database Files

Databases: Documentation By Design

- A good use of databases is to control documentation. Not just in the traditional sense of recording document management, but using the data within the database to produce relevant data within a report – eg:
 - Analysis Reports
 - Letters, Reports, Correspondence (mail merging)
 - Accounting Reports
 - Delivery/Despatch
 - Reference Centre of Data available

Emails are documents, too!

- One of the most forgotten types of documentation that definitely needs control is email.
- Email correspondence and email attachments have a particular importance to business today, and yet are not treated with the respect and consideration required.

Email Handling

- By law, your emails are treated as business documents, which means the same as dealing with other business documents.....
- After 5 years (or 7 for accounts), you can delete them, but not before then!

Email Management

- Storing email business documents for this length of time now means that you REALLY REQUIRE a style of email management which is not just a straight email program.
- Basically, you need an email program which is a database as well, which handles emails in the same way as the rest of your important business documents.

Aren't all Email Programs the Same?

- **No, they aren't.**
- One of the most common email programs in business today is NOT able to handle emails in this fashion. When dealing with email programs, there are issues such as
 - finding emails quickly, related to topic, date, and senders / receivers (company wide)
 - Attachments to emails aren't really attachments when you want to access them later.
 - Space they use on your company's mail server.

General Office Document Control

- Other office documents also require some control, as to which contact is receiving or being sent which piece of correspondence or data, whether internal or external to the office:
 - Letters/Correspondence/Memos
 - Samples – Delivery/Despatch
 - Production control
 - Sales/Marketing Materials

Where Else Are The Docs?

- Documents for control can be located in many different locations besides on the computers or networks:

Internet Intranet
Hard Copy Local versions
 Redundancy
 /Backups

Finger Tip Knowledge

- Sharing information and documentation company-wide, or group-wide in the form of a knowledgebase, no matter what it is or where it is stored, is of vital importance to increasing your business power.
- **Knowledge is Power = Increased Profitability**
- **Documents can be stored anywhere accessible, as long as there is a link to them, from a central access starting point!**

Databases – Documents Or People?

- When determining a type of document control database, which is better to control the information? People or the Documents?
- It really depends upon the document types, but in the end, documents are for people, and therefore you need to LINK documents to People, and People to Documents.

Which industries should use Document Control?

ALL OF THEM!!!

Utilities, Real Estate, Insurance, Retail, Health, Manufacturing, Education, Hi-Tech, Finance, Business Services, Publishing, Sports / Recreational

How to implement a Document Management Policy

```
graph TD; A[What are your change options?] --> B[Structure]; A --> C[Technology]; A --> D[People];
```

Most people hate any change that doesn't jingle in their pockets. -Anonymous

Methodology for Technology

- Enter all the relevant data into the ONE database or program.
 - Prevent double-handling of information
 - Prevent loss of information
 - Provide a centralised point for data analysis
 - Get the results you need much quicker.
 - Where you need to link with other programs, *link that data also.*

How can this best be achieved?

- Know what data you already have, in multiple sources, and consolidate it into a single database where possible.
- Join programs together where necessary.
 - The best way of doing this?
- **GoldMine Business Contact Manager**

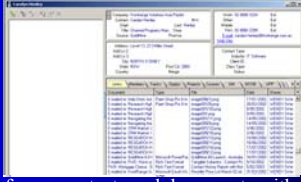
What Can GoldMine Do For You?

- Be your customer/prospect database
- Be your document management system database
- Be your central information /linkage area
- Be your calendar and activity manager
- Be your email manager
- Be your automated personal assistant
- **And link it all together to the contact's record, to form their data file**

How can GoldMine do all this & More?

- GoldMine is a highly customisable program, and is suitable for the requirements of both strict document control, and contact management (including general office documentation).
- It is the ONLY contact management program currently available for SME which can imitate multiple styles of database in ONE database.

Contact Database



- Enter all of your contacts and documents with details, whether they be for:
 - Clients
 - Prospects
 - Suppliers
 - Other Contacts

Consolidate Contacts' Procedure Groups Easily



- Quickly build visible lists of which procedures are issued to a contact, by identifying and grouping the document records together for easy reference

Filter Your Contacts



- Filter through your contacts based upon chosen criteria, such as:
 - Demographics
 - Contact Type
 - Document Data

Link to Other Data Programs

- Wouldn't it be great to be able to link to other data programs, and only have to update information once? Now you can:
 - **Word, Excel, MYOB, PDAs,**
 - (other programs available with ODBC linkages)

But Wait, There's More!!

- Getting GoldMine is only part of the equation if you want to get ahead.

How To Get The Best Results

- Seahorse Data also provides additional services to ensure you get the best from your GoldMine solution:
 - Business process analysis of your work practices to ensure maximum efficiencies in your business structure, your people, and your technologies
 - A customised solution for your business
 - Data consolidation, and data entry/importation
 - GoldMine training
 - GoldMine program support

*(Getting a software program without training and support is like buying a **RED** Ferrari and driving with a learner's permit, and not getting it serviced regularly)*

Want To Know More?

- We've only had the chance to go through a very small number of advantages of what GoldMine can do for you.
- If you would like to know more, please contact Seahorse Data and schedule your
 - CRM/Data Performance Analysis
 - (valued at \$295)

Thank you for your time.

Wendy Collett - Seahorse Data

Ph: 07 3272 9622

wendy@seahorsedata.com

www.seahorsedata.com
