

# Document Management The Good, the Bad, and the Ugly

Angie Martin  
Angela Martin Training and Consulting

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## Successful Knowledge Management

- › Case Study
- › Key features to avoid derailment
- › Route to success



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## A Glimpse at an Implementation

- › 1 location
- › 100 total users
- › 14 partners
- › 2 IT staff
- › Computer User skill level - average

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## The Team

- ▶ 4 Permanent members –
  - IT Staff (2)
  - Director of Education
  - Technology Partner
- ▶ 4 from each of 4 departments
  - Admin
  - Tax
  - Audit
  - General Accounting

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## The Steps

Overview of Document Management



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## The Pieces

- ▶ Partner Buy in and Support
- ▶ Document Processes
- ▶ System Requirements
- ▶ Demonstrations
- ▶ Process Improvement
- ▶ Critical Support
- ▶ Implementation Plan
- ▶ Control Factors
- ▶ Training issues

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# The Steps

## Demonstrations



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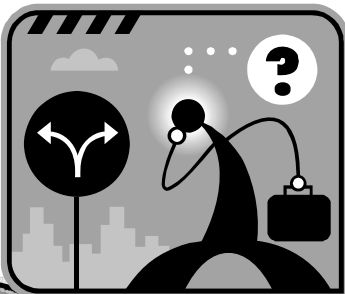
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# The Steps

## Selection



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# The Steps

## Implementation



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## Before the Beginning

- ▶ If your company is already using software systems, integration is vital.
- ▶ The sooner data/information is in a digital format and in the system, the sooner it can be used.
- ▶ Digital information lends itself to comprehensive security control.
- ▶ Are your current processes documented?



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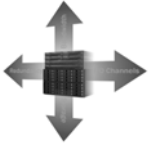
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## Critical Issues

- ▶ Have you identified common processes in different departments?
- ▶ Are data transfer needs from department to department documented?
- ▶ Will all key players commit to a new way?



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## Integration With Current System



- ▶ With existing system
- ▶ Many ways depending on the applications

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## Workflow

- ▶ What are the workflows before Document Management
- ▶ How will these change
- ▶ Automated so users cannot sidestep policy or forget critical steps
- ▶ Collaboration options



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## Other Vital Issues

- ▶ Security
- ▶ Accountability
- ▶ Auditing
- ▶ Management
- ▶ Government Regulations and Legal Standards
- ▶ Disasters

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## Questions to Ask



- ▶ Can I store all my corporate knowledge in one place?
- ▶ Is the system scalable enough to meet my needs now and in the future?
- ▶ What kind of efficiency tools should I expect?
- ▶ How well will the system integrate with my current system?
- ▶ What is workflow and how will I benefit from it?
- ▶ Does the system offer the capability to accomplish practices remotely?



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## Questions to Ask (cont)



- ▶ How secure is the system?
- ▶ Does the system have any features to support my need for accountability, auditing and management?
- ▶ Does the system comply with current government regulations and legal standards to protect information?
- ▶ What protections does the system provide for me in the event of a disaster?



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