Managing Information Overload
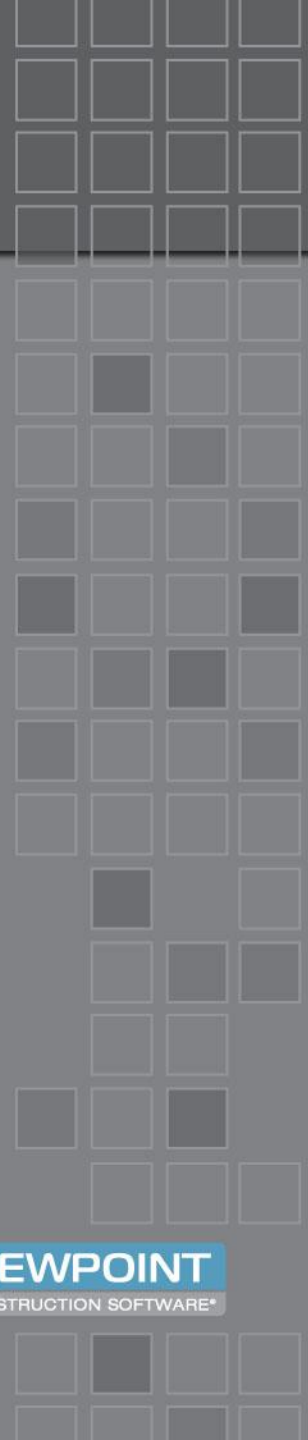
Transitioning to a Paperless Environment

Speakers

Tim Gray
Market Development Manager
Viewpoint Construction Software

Tim Gray is the market development manager for Viewpoint Construction Software's Western Region. Gray has over 22 years of professional accounting experience with a construction industry focus since 1998.   He obtained his CPA while working with Ernst & Young and PWC.

Kathleen Schneider
President
Richman Knoll Associates

Kathleen Schneider is the president of Richman Knoll Associates. With 20 years' experience as a company officer for a third party administrator, SRC – An Aetna Company, she understands challenges faced by business owners to increase profitability and streamline operations in the complex contracting environment.

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Business Intelligence (BI)

As Defined:

Converting capabilities into knowledge, getting the right information to the right people, at the right time, via the right channel.

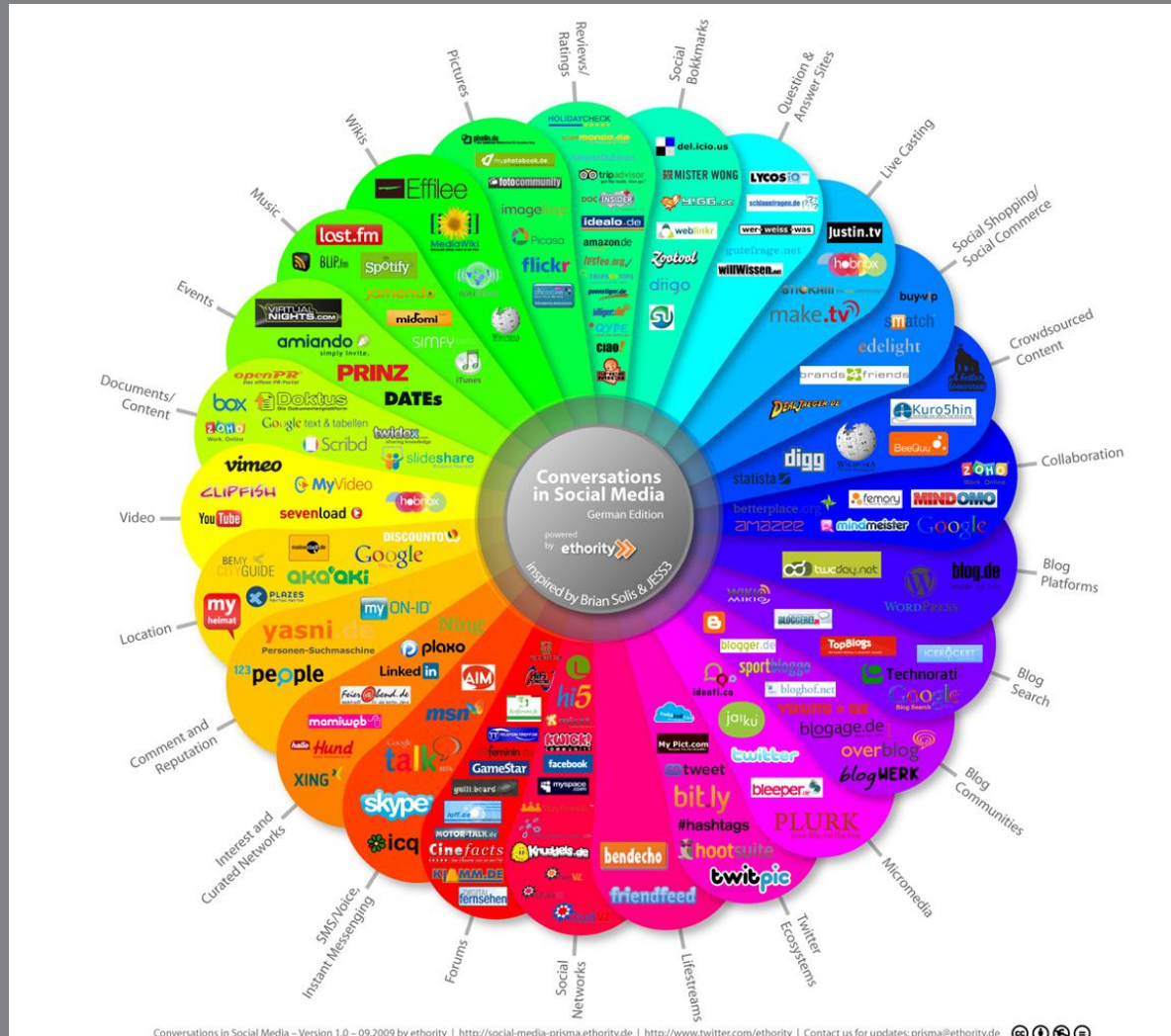VIEWPOINT
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Business Intelligence (BI)

"Every two days now, we create as much information as we did from the dawn of civilization up until 2003."

Eric Schmidt
CEO, Google

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Business Intelligence (BI)

Conversations in Social Media – Version 1.0 – 09.2009 by ethority | http://social-media-prisma.ethority.de | http://www.twitter.com/ethority | Contact us for updates: prisma@ethority.de

Average $10 Million Project

DOCUMENTATION

- 50 document types
- 56,000 pages
- 25 banker boxes
- 6 @ 20" dia., 50' tall trees of paper

COLLABORATION

- 420 companies, suppliers, trades, etc.
- 850 individuals

(1) Project Management for Construction by Chris Hendrickson

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5 Key Planning Areas

Identify the Process

Organization

Storage

Security

Retention

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POLLING QUESTION #1

Does your company have a strategy to handle your paper/digital BI?

- Yes

- No

- Maybe

- Not Sure

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Identify the Process

1. Assess where you are in the paper/digital process

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Where are you today?

Paperless?

Paper ▮▮▮▮▮ Digital

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POLLING QUESTION #2

Estimate your % of a paperless environment:

0 - 30%

31-60%

61-90%

Over 90%

Not Sure

Identify the Process

1. Assess where you are in the paper/digital process
2. Identify your sources of information (both internal and external)
3. Indicate the received/created format

Identify the Process

1. Assess where you are in the paper/digital process
2. Identify your sources of information (both internal and external)
3. Indicate the received/created format
4. Filter the documents
    Ask: *Is this BI to the company*?

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Organization

1. Evaluate your current organization level

Paper Environment

Unorganized ━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━ Organized

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Digital Environment

Unorganized ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ Organized

Organization

	Unorganized	Organized
Digital		
Paper	●	

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Organization

	Unorganized	Organized
Digital		
Paper		●

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POLLING QUESTION #3

How would you rank your current organization level?

A mess   – hard to find anything

Unorganized   – can find items, just takes a long time

Organized   – most of the items are easy to find

Very organized – very fast and very easy to find items

Not Sure

Organization

1. Evaluate your current organization level
2. Consider a document management system

Organization

Organization

Organization

Organization

1. Evaluate your current organization level
2. Consider a document management system
3. Identify document types/groups/categories
4. File naming convention
5. What format is needed (i.e. OCR required)?

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Organization

1. Evaluate your current organization level
2. Consider a document management system
3. Identify document types/groups/categories
4. File naming convention
5. What format is needed (i.e. OCR required)?
6. Consider how you would search for documents in the future

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Organization

When you search for information will this be your situation?

Your

Storage

1. Control where permanent BI will be stored
2. Determine where temporary BI is allowed – laptops, thumb drives, CDs, email, server only, etc.

Storage

1. Control where permanent BI will be stored
2. Determine where temporary BI is allowed – laptops, thumb drives, CDs, email, server only, etc.
3. Identify a BI back up process
4. Create a disaster recovery plan
5. Develop a process to restore data when needed and test regularly

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Security

1. Develop security roles and groups
2. Determine what BI requires security restrictions

Security

1. Develop security roles and groups
2. Determine what BI requires security restrictions
3. What information can be accessed remotely?
4. Who can access from outside the company?
5. Identify BI that requires encryption

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Retention

1. Create a retention policy for your BI that is rigorously and consistently applied

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Retention

1. Create a retention policy for your BI that is rigorously and consistently applied
2. Develop retention requirements for each BI type/group
3. Identify jurisdictional requirements along with company needs

Retention

1. Create a retention policy for your BI that is rigorously and consistently applied
2. Develop retention requirements for each BI type/group
3. Identify jurisdictional requirements along with company needs
4. Indicate the length of time to archive and purge and assign to the BI type
5. Determine the frequency and period to archive and purge

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In Closing...

Ask yourself this question:

In the year 2020 will someone be able to find the BI from work being done today?

You can't afford to wait.
Start your plan today.

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Q & A