

Structured File Management & Knowledge Management

Boost Productivity of Microsoft Office Users



Hazel Infotech Ltd

CA. B.C.Chechani , Chief Executive Officer

Executive Summary

Every type of organization has too much data and in particular the unstructured data lying in documents remains unorganized in absence of simple and efficient Electronic Record Management Solutions. Sorting these data and documents, picking out valid one, classifying further in logical groups and transforming into meaningful information and reusable knowledge are among few of the challenges raging issues today and every organization irrespective of the size is suffering because of that and loosing productivity at work place.

Disorganized and scattered files also affect the Knowledge Management Practices which is the need of the time. It is very important that whatever has been done in the past on similar subjects/issues should be reused without any fail and that is possible by effective and yet Simple Knowledge Management System in place. And the Knowledge Management cannot be implemented without Structured File Management.

KDOC® is a solution for Structured File Management and Knowledge Management that helps to create systematic records of documents, emails, templates & knowledge base for easy reference & re-use. KDOC will help any organizations who use Microsoft® Office in quick retrieval and easy creation of documents and templates. It enhances productivity, especially while creating repetitive documents.

eSecretary software helps in Secretarial & Organizational tasks through an efficient Correspondence Automation and Management Solution that seamlessly integrates with Microsoft® Office.

Both the software products enhance productivity with Microsoft® Office and provides solution for efficient File Management but with different type of user interface. eSecretary is useful for correspondence automation and organizing needs for secretarial tasks in any office. eSecretary also provides different useful solutions required for secretarial tasks like Contact Management, Greeting Management and Simplified Mail Merge & email Merge with Microsoft® Office and envelops & labels printing etc.

Contrary to eSecretary , KDOC is a **core file management solution** that automates and simplifies organizing of documents through a compelling mechanism for automated assignment/ tagging of properties for each document generated across the organization with automated saving of documents and templates in a single , centralized and secured repository with extensive access rights mechanism.

1. Taxonomy for Document Profiling / Tagging

File and folder naming conventions are always differing from person to person and lack of pre-planned taxonomy (classification) for file and folder naming and saving structure leads to indiscipline in naming and saving documents. Organizations suffer due to this indiscipline in organizing documents and templates. This creates problems, while retrieving the documents. This becomes troublesome when, the person who created a document/s is absent and documents are required to be referred. Hence a lot of time is wasted in locating the document and knowledge workers waste time to create documents from the scratch.

Hence Structured File Management can be a very important productivity tool contrary to loose-end file management in Windows Folder Hierarchy. Structured File Management will enable to build a well planned schema for classification of files and folders and provides a mechanism to profile/tag each and every document within the planned structure only. This makes retrieval of documents easier.

2. Compels Centralized Storing of documents & Knowledge Base

In most organizations, executives store the documents on their desktops/ laptops. There is no centralized storage of Documents. Thus important documents are scattered across the organization. Some organizations may have a rule to store all documents in a central server, but there is no guarantee that their partners and article students are following these rules. There is a need to store all the documents at a central place. KDOC solve the problem of scattered documents in an organization.

3. Unique Document Numbering System

There is no unique document numbering system in most of the organizations. This results in difficulties, while retrieving the documents. As a result, a lot of time is wasted in locating the documents, when required. Secondly many times important documents may be overwritten. It becomes difficult to find final draft from many drafts available.

Thus there is need for a unique document numbering system in the organizations. This will eliminate the overwriting of important documents and also will help in identifying the final draft from many drafts. Hence KDOC fulfills this need. It gives a system generated unique number to each document and the number is not repeated. You can identify the document using the document number.

4. Security of Documents & Knowledgebase/Templates

In many organizations, security of documents is not given as much importance as necessary. Thus, many important documents are not stored in a secured way. Sometimes an unauthorized person can also access the important document and create problems for the organization. There is a need for Security of all the documents in an organization. KDOC will ensure that only authorized persons can access important documents. KDOC also enables to assign rights about who can access what type of documents.

5. Real Time Back up of Documents & Knowledge Documents

In many organizations back up is taken only once in a day. This may not be enough in case where many documents are being created in an organization. Loss of even one important document may lead to a lot of problems. There is need for real time back up in organizations. KDOC will ensure that all documents created are available in the back-up repository. Not even a single document will be missed.

6. Ease Knowledge Base Management

It is very important to manage knowledge base in any organization. The knowledge base may be Best Practice documents evolved over a period of time or other important formats or templates which are useful in day-to-day work. But most of the organizations don't have a systematic way of organizing their Knowledge base. This results in inefficiencies in the organization, because if something has already been done earlier, it has to be re-done again from scratch.

There is a need to manage Knowledge base of the firms easily and systematically. This will help improve the efficiency and productivity across the organization. Knowledge base repository must be built. Templates must be made available to the executives as per their requirements.

7. Email productivity with MS Outlook

Nowadays, most of the communications take place via emails. Thus your Outlook gets overloaded every day; e.g. You get 10 emails in a day, but only 2 are important. How to manage these 2 important emails is an issue most of us are facing in the organization. Many times this results in loss of productivity also. There is a need to archive important emails in an efficient way, so that individuals' productivity does not suffer. Important emails must be stored separately and should be available, when required. Both the software provides an easy mechanism for archival of important emails through plug in for Microsoft Outlook.

8. Automated Letter Creation with Microsoft Word

A practice has been observed that, partners and staff create letters from the scratch, resulting in more time taken to create even a simple letter. Some use standard templates, but even here they have to put in the date, address, signature etc. This results in loss of productivity. There is need of a mechanism to generate letters/correspondence automatically. e.g. The address of the customer, date and reference no, body of the letter and signature should be automatically selected/generated from the data base available. eSecretary not only provides the automation features for drafting letters but also saves the letters automatically.

9. Correspondence Tracking System

Since there is no systematic way of storing the correspondence done with a particular customer or a government agency in most of the organizations, knowledge workers waste a lot of time in locating old correspondence to know the trail of the correspondence with a particular entity or retrieving a particular correspondence document whether letter or email. Many times they have to shuffle between Microsoft® Outlook and their storage location to see the correspondence done, both by emails and by letters. This results in loss of productivity. eSecretary software simplifies the tracking of correspondence and provides many ways to list of trail of correspondence and also ease to retrieve a particular correspondence document.

10. Contact Management & easy Group Communication

In many organizations, the customer information is not well organized or scattered across the computer network, in Card Holders, in Excel sheets, etc. There is no concept of central repository of business and personal contacts. This leads to a lot of duplication and loss of productivity across the organization. Similarly, the group communication using Microsoft® Office has many steps and it takes time. Moreover Group communication is not personalized.

There is requirement to manage contacts centrally and also simplify the group communications by reducing the number of steps required. This will avoid contact duplication and will also save time taken to create Group communication.

eSecretary provides solution for intelligent information management of contacts, profiling and categorization of contacts. The group communication functionality in eSecretary also simplifies mail merge and email merge. The numbers of steps required are lesser and procedure is very simple. Moreover, eSecretary also maintains a record of the Group Communications done, emails or physical letters to re-do another mail merge and email merge.