

# TOTAL DATA MANAGEMENT: CASE STUDY

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## *DOCUMENT CONTROL*

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## 1. CASE STUDY

This document comprises a case study of a web-based application supporting TDM's document archiving processes.

### 1.1. THE CLIENT

TDM operates an archiving business for paperwork related to insolvency practices. Insolvency Practitioners (IP's) have a legal requirement to store company books and records related to various insolvent companies for whom they act, as well as their own internal office/working files.

### 1.2. EXISTING SYSTEMS

TDM had an Access 97 based Database which was used to manage the boxes they hold in Archive Storage for their customers. They had an immediate requirement to provide clients with secure access to some areas of this database via some sort of "online" portal.

They realised that the current Access 97 based system was unsuited to handling this task in particular, nor accomodating the projected growth (in terms of the number of records they expect to hold) or general improvements to system features believed to be required in the future.

### 1.3. ENGAGEMENT

Mercury1 were approached to submit a proposal for the project, and spent a day on-site with Total Data staff learning about the way the business operated and walking through how the existing systems worked (and didn't work).

The proposal was based on the output from this day, and included a number of suggested features that might alleviate staff headaches in interacting with the software.

### 1.4. SOLUTION

The solution delivered included the following features:

- Management system for boxes of data. Tracking each box location, volume, and movements (by barcode)
  - Picking list requests to print for warehouse staff to action
  - Bulk label printing
  - Batch update and import process
  - Generation of various business and management reports
- Ability to grant access to selected clients to see cut down information
  - Ability for clients to request boxes online. Request details are automatically loaded into the system and emailed to Total Data staff

- An application to run on machines in the client's office, responsible for receiving data from the barcode scanner and automatically interfacing to the web-based application

#### 1.5. CUSTOMER BENEFITS

Total Data have benefited from a more stable and reliable system, that is quicker and easier to use than previously. They have also on several occasions taken advantage of Mercury1's rapid turnaround time for new features, and have requested alternations that further speed up their tasks.

Batch upload and update facilities have streamlined the process of updating volumes of data, most notably highlighted when taking in a high volume of boxes from a partner – thousands of boxes over a few days. The new system made inputting this information straightforward, and gave a rapid turnaround to printing the labels that are required to mark-up the boxes before they can be stored in the warehouse.

Through giving access to the system to their key client they have removed an administrative task for themselves (namely fielding requests to look up boxes and complete a picking list), whilst also providing a valuable service to the client – who can now simply log on, search for the boxes they wish to access, and select them for delivery. The application processes this request, notifying the relevant parties and preparing the box records for delivery.

Implementation of the system has also improved the tracking of boxes, as the application understands the intended workflows and flags any unexpected movements: i.e. a box cannot be scanned out if it is currently thought to be at a client's premises, and a box cannot be scanned in, if it is already in the warehouse.