



# **Document Management**

## **Questionnaire**

**Version: 1.0**

15 May 2001

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# 1 Introduction

This questionnaire is designed to help clients with their document management issues and to assist in lowering hidden costs. A series of questions about documents and their management and clients are asked to complete as many questions as possible. The results obtained from this questionnaire form the bases of a review that is reported to the client.

## 2 Instructions

When using this questionnaire, please consider the following guidelines:

- The purpose and use of this document shall be explained to the client and completed in collaboration with the client.
- Provision of comprehensive and authoritative answering of the questions is in the best interest of the client. The results are not a criticism of the document management activities reviewed.
- When completing the document, please over-write the symbols and the text between “<<” and “>>”. If the information is not applicable or is unknown please state accordingly. Update the table of contents at the end.
- Sections of the document or the entire document may need to be reproduced for different business units, organisations and countries.
- Leave all of the questions in the document. The absence of information is as important as its presence.
- Please ensure signoff by the client.

## 3 Creation cost

### 3.1 Introduction

The following spreadsheet, Table I, is used to estimate the creation costs of documents across an organisation or business group. Creation costs does not include publication and distribution costs. In completing the spreadsheet please use realistic averages and consider one year only.

### 3.2 Information p population instructions

Please use the following notes to assist in population of information in the following sections.

- High-end publications are those that have required extensive development work and complex layout and production requirements, e.g. marketing material, annual reports. External parties would typically produce these.
- Consultant produced documents are reports and other documents that have been produced by external consultants for specific purposes.
- Internal documents >50pp are documents produced internally greater than 50 pages in length. Please adjust the average time and cost per day accordingly.
- Internal documents 20 – 50 pp are documents produced internally that are between 20 and 50 pages in length. Please adjust the average time and cost per day accordingly.



- Internal 5-20pp documents are documents produced internally that are between 5 and 20 pages in length. Please adjust the average time to produce, person days, (# Days) and person day cost accordingly.
- Internal <5pp documents are documents produced internally that are less than 20 pages in length. Please adjust the average time to produce, person days, (# Days) and person day cost accordingly.
- Repeat for each business unit.

### 3.3 <<Business unit>>

The annual cost of document creation is \$<<enter total number from Table I>>

<b>Business unit annual document creation costs</b>					
				Person day cost	\$500
Document type	# Days	Quantity	Cost per Document	Total Cost	
Internal document >50pp	20	5	\$10,000		\$50,000
Internal document 20-50pp	10	2	\$5,000		\$10,000
Internal document 5-20pp	5	1	\$2,500		\$2,500
Internal document <5pp	1	10	\$500		\$5,000
High-end publications	-	100	\$5,000		\$500,000
Consultant produced documents	-	50	\$8,000		\$400,000
Total					<u>\$967,500</u>

Table I. Cost of document creation for one year.

<<State the quality of the information used in the estimates.>>

### 3.4 <<Business unit>>

The annual cost of document creation is \$<<enter total number from Table II>>

<b>Business unit annual document creation costs</b>					
				Person day cost	\$500
Document type	# Days	Quantity	Cost per Document	Total Cost	
Internal document >50pp	20	5	\$10,000		\$50,000
Internal document 20-50pp	10	2	\$5,000		\$10,000
Internal document <20pp	5	1	\$2,500		\$2,500
High-end publications	-	100	\$5,000		\$500,000
Consultant produced documents	-	50	\$8,000		\$400,000
Total					<u>\$962,500</u>



Table II. Cost of document creation for one year.

<<State the quality of the information used in the estimates.>>

## 3.5 Total cost

Total cost of creation for each document type is shown in Table III.

<b>Total annual document creation costs</b>	
<b>Document type</b>	<b>Cost</b>
Internal document >50pp	\$15,000
Internal document 20-50pp	\$3,500,000
Internal document 5-20pp	\$78,000
Internal document <5pp	\$20,000
High-end publications	\$245,000
Consultant produced documents	\$2,533
<b>Total</b>	<b>\$3,860,533</b>

Table III. Total creation costs.

## 4 Information assets

### 4.1 Introduction

Documents contain considerable amounts of valuable information and much of the corporate IP is trapped within them. Use this section to place an estimate on this value.

### 4.2 Information population instructions

Please use the following notes to assist in population of information in the following sections.

- For generic content types in a series of contexts, rate the criticalness of a document on a scale of 1 to 5. One is of little importance and 5 are critical.
- Use typical examples of documents and scenarios that are relevant to a given business unit in the context they understand.
- The contexts may need to be changed with company but should be consistent within a company.
- Document types may change with company but should be standard within a company.
- Remove redundant document types from the listings.
- The results in Table IV are examples only.

### 4.3 <<Business unit>>

An estimate of the importance of documents to <<business unit>> in different contexts is shown in Table IV.



Document type	Scenario				
	External customer	External competitor	Company employee	Senior manager	Court case
Brochure	3	2	2	3	3
Budget	4	4	2	3	3
Catalogue	2	2	2	3	3
Conditions	3	2	2	3	4
Contract	2	4	2	3	4
Glossary	4	1	2	3	3
Guidelines	2	1	2	3	3
Plan	4	3	2	3	3
Policy	3	2	2	3	4
Presentation	4	2	2	3	3
Price	4	2	2	3	3
Procedure	3	2	2	3	4
Report	1	2	2	3	3
Requirements	1	3	2	3	3
Schedule	1	3	2	3	3
Specification	1	3	2	3	3
Tender	4	2	2	3	3
Average	2.7	2.4	2.0	3.0	3.2

Table IV. Estimating information assets.

<<State the quality of the information used in the estimates.>>

## 4.4 <<Business unit>>

An estimate of the importance of documents to <<business unit>> in different contexts is shown in Table V.

Document type	Scenario				
	External customer	External competitor	Company employee	Senior manager	Court case
Brochure	3	2	2	3	3
Budget	4	4	2	3	3
Catalogue	2	2	2	3	3
Conditions	3	2	2	3	4
Contract	2	4	2	3	4
Glossary	4	1	2	3	3
Guidelines	2	1	2	3	3
Requirements	1	3	2	3	3
Schedule	1	3	2	3	3
Specification	1	3	2	3	3
Tender	4	2	2	3	3
Average	2.5	2.5	2.0	3.0	3.2



Table V. Estimating information assets.

<<State the quality of the information used in the estimates.>>

## 4.5 Total value

<<enter a descriptive summary of major findings of the exercise, try to estimate the value to the business and if possible include details on \$ values>>

# 5 Quality assurance

## 5.1 Introduction

To ensure quality, documents that are to be released externally are subjected to peer review and release authorisation processes. Similar processes and procedures are used to quality assure some internal documents. Legal review is considered to be part of the peer review and release procedures.

Quality assurance also comes through version control, format control and language control. These issues are part of the release and peer review procedures. Use this section of the document to establish the procedures used.

## 5.2 Peer review

### 5.2.1 Introduction

Peer review may be either formal or informal. That is a document may be informally reviewed before it is formally reviewed. Only the formal process is considered here.

### 5.2.2 Procedure

<<state the procedure used for peer review, refer to manuals where possible>>

### 5.2.3 Review guidelines

<<state the guidelines provided for peer review, refer to manuals where possible>>

### 5.2.4 Monitoring method

<<state the methods and tools used to monitor the procedure, refer to manuals where possible>>

### 5.2.5 Reporting details

<<state the reporting completed to ensure peer review and quality assurance, refer to manuals where possible>>

### 5.2.6 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>



## 5.3 Release procedure

### 5.3.1 Introduction

Whilst different documents may be subjected to different release procedures, what is sort is high level commonality.

### 5.3.2 Procedure

<<state the procedure used for external and internal release, refer to manuals where possible>>

### 5.3.3 Review guidelines

<<state the guidelines provided for release, refer to manuals where possible>>

### 5.3.4 Monitoring method

<<state the methods and tools used to monitor the procedure, refer to manuals where possible>>

### 5.3.5 Reporting details

<<state the reporting completed to ensure adherence to release procedure, refer to manuals where possible>>

### 5.3.6 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

## 5.4 Expiry procedure

### 5.4.1 Introduction

As important as the release of documents is the expiry of invalid documents.

### 5.4.2 Procedure

<<state the procedure used for external and internal expiry, refer to manuals where possible>>

### 5.4.3 Expiry guidelines

<<state the guidelines provided for expiry, refer to manuals where possible>>

### 5.4.4 Monitoring method

<<state the methods and tools used to monitor the procedure, refer to manuals where possible>>

### 5.4.5 Reporting details

<<state the reporting completed to ensure adherence to expiry procedure, refer to manuals where possible>>



## **5.4.6 Outcomes realised**

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

# **5.5 Version control**

## **5.5.1 Introduction**

Version control relates to the different versions of a document, not the different formats a document may exist in. Where informal review and non-review of documents has occurred, version control should also exist but the details sought here relate to formal review.

## **5.5.2 Procedure**

<<state the procedure used for version control, refer to manuals where possible>>

## **5.5.3 Update release**

<<state the procedure used for release of new versions, refer to manuals where possible>>

## **5.5.4 Monitoring method**

<<state the methods and tools used to monitor version control and release control, refer to manuals where possible>>

## **5.5.5 Reporting details**

<<state the reporting completed to ensure adherence version control procedure, refer to manuals where possible>>

## **5.5.6 Outcomes realised**

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

# **5.6 Format control**

## **5.6.1 Introduction**

A document is stored in a master format and version control applied to this. Documents may be released in different formats. A change in format is not a change of version. When a version is changed, all formats should be appropriately changed.

## **5.6.2 Procedure**

<<state the procedure used for format control, refer to manuals where possible>>

## **5.6.3 Update release**

<<state the procedure used for release of new formats, refer to manuals where possible>>



### **5.6.4 Monitoring method**

<<state the methods and tools used to monitor format control and release control, refer to manuals where possible>>

### **5.6.5 Reporting details**

<<state the reporting completed to ensure adherence format control procedure, refer to manuals where possible>>

### **5.6.6 Outcomes realised**

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

## **5.7 Multi-lingual support**

### **5.7.1 Introduction**

Support for multiple languages may be required where operations are conducted in one or more country, or within one country. Multiple language support is not just the difference between one language and another but difference within a language, e.g. American English and Australian English.

A document is stored in a master language and translations of that document are applied to this. A change in language is not a change of version. All formats and languages should be appropriately changed when a version is changed.

### **5.7.2 Procedure**

<<state the procedure used for language control, refer to manuals where possible>>

### **5.7.3 Update release**

<<state the procedure used for release of new languages, refer to manuals where possible>>

### **5.7.4 Monitoring method**

<<state the methods and tools used to monitor language control and release control, refer to manuals where possible>>

### **5.7.5 Reporting details**

<<state the reporting completed to ensure adherence language control procedure, refer to manuals where possible>>

### **5.7.6 Outcomes realised**

<<state the outcomes achieved by the reporting, refer to manuals where possible>>



## 6 Storage and archival

### 6.1 Introduction

An organisation invests considerable resources in the development of documents that contain critical corporate information. The cost of recreating this information when it is lost is a hidden cost endured by many organisations.

### 6.2 Method of storage

#### 6.2.1 Electronic storage

<<state the method of storage used for electronic documents, refer to document.>>

#### 6.2.2 Record storage

<<state the method of storage used for hardcopy documents, refer to manuals where possible.>>

#### 6.2.3 Integration

<<state the method of information integration between hardcopy documents and electronic documents, refer to manuals where possible.>>

### 6.3 Backup

#### 6.3.1 Procedure

<<state the procedure used for backup of hard and soft copy, refer to manuals where possible>>

#### 6.3.2 Monitoring method

<<state the methods and tools used to monitor backup procedures, refer to manuals where possible>>

#### 6.3.3 Reporting details

<<state the reporting completed to ensure adherence to procedures, refer to manuals where possible>>

#### 6.3.4 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

#### 6.3.5 Estimate the loss to the business

<<state the loss to the organisation, either qualitative or quantitative, of not having a backup procedure, refer to manuals where possible>>



## 6.4 Archiving

### 6.4.1 Offsite archiving

#### 6.4.1.1 Procedure

<<state the procedure used for offsite archiving, refer to manuals where possible>>

#### 6.4.1.2 Monitoring method

<<state the methods and tools used to monitor archiving procedures, refer to manuals where possible>>

#### 6.4.1.3 Reporting details

<<state the reporting completed to ensure adherence to procedures, refer to manuals where possible>>

#### 6.4.1.4 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

### 6.4.2 Onsite archiving

#### 6.4.2.1 Procedure

<<state the procedure used for onsite archiving, refer to manuals where possible>>

#### 6.4.2.2 Monitoring method

<<state the methods and tools used to monitor archiving procedures, refer to manuals where possible>>

#### 6.4.2.3 Reporting details

<<state the reporting completed to ensure adherence to procedures, refer to manuals where possible>>

#### 6.4.2.4 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

### 6.4.3 Expiry procedures

#### 6.4.3.1 Procedure

<<state the procedure used for archive expiry, refer to manuals where possible>>

#### 6.4.3.2 Monitoring method

<<state the methods and tools used to monitor archive expiry procedures, refer to manuals where possible>>



### **6.4.3.3 Reporting details**

<<state the reporting completed to ensure adherence to procedures, refer to manuals where possible>>

### **6.4.3.4 Outcomes realised**

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

## **6.5 Recovery**

### **6.5.1 Procedure**

<<state the procedure used for recovery of documents, refer to manuals where possible>>

### **6.5.2 Monitoring method**

<<state the methods and tools used to monitor recovery performance, refer to manuals where possible>>

### **6.5.3 Reporting details**

<<state the reporting completed to ensure adherence to procedure, refer to manuals where possible>>

### **6.5.4 Outcomes realised**

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

## **7 Security and access**

### **7.1 Introduction**

Documents often contain confidential or sensitive information and being able to control who has access to this information is pivotal. What is also of importance is who has rights to create and modify documents and whether people should even now a document exists.

The nature of the security and access is dependent upon the mechanism of storage. When documents are stored locally on a PC and only selected people know that the documents exist, then as long as the person is honest and no one else has access, it is very secure. If no one else knows that this document exists, then it may be recreated by colleagues and what happens when the person leaves?

### **7.2 Unauthorised editing**

#### **7.2.1 Introduction**

Use this section of the document to establish the risk to the client of unauthorised editing of documents. Ability to edit assumes unauthorised distribution.. By monitoring unauthorised editing, authorised editing is also monitored.



## 7.2.2 Procedure

<<state the procedure used for unauthorised editing control, refer to manuals where possible>>

## 7.2.3 Monitoring method

<<state the methods and tools used to monitor unauthorised editing, refer to manuals where possible>>

## 7.2.4 Reporting details

<<state the reporting completed to control unauthorised editing, refer to manuals where possible>>

## 7.2.5 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

## 7.2.6 Estimate the loss to the business

<<state the loss to the organisation, either qualitative or quantitative, of unauthorised editing, refer to manuals where possible>>

# 7.3 Unauthorised access

## 7.3.1 Introduction

Use this section of the document to establish the risk to the client of unauthorised access. Access in this context is considered to include distribution. By monitoring unauthorised access, authorised access is also monitored.

## 7.3.2 Procedure

<<state the procedure used for unauthorised access control, refer to manuals where possible>>

## 7.3.3 Monitoring method

<<state the methods and tools used to monitor unauthorised access, refer to manuals where possible>>

## 7.3.4 Reporting details

<<state the reporting completed to control unauthorised access, refer to manuals where possible>>

## 7.3.5 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

## 7.3.6 Estimate the loss to the business

<<state the loss to the organisation, either qualitative or quantitative, of unauthorised access, refer to manuals where possible>>



## 7.4 Required access

### 7.4.1 Introduction

Smooth access to the right information is critical to the operation of a business. Use this section of the document to establish how access to documents is provided and the impact upon the business.

### 7.4.2 Metadata

#### 7.4.2.1 Introduction

Metadata is data about data and is used to describe the data or a document. This would include information like titles, abstracts, ownership, access rights, last edited details, version information etc. Metadata needs to be applied to each document.

#### 7.4.2.2 Procedure

<<state the procedure used for the application of metadata to documents, refer to manuals where possible>>

#### 7.4.2.3 Monitoring method

<<state the methods and tools used to ensure population and maintenance of metadata, refer to manuals where possible>>

#### 7.4.2.4 Reporting details

<<state the reporting completed to ensure population of metadata, refer to manuals where possible>>

#### 7.4.2.5 Outcomes realised

<<state the outcomes achieved by the reporting, refer to manuals where possible>>

### 7.4.3 Searching

#### 7.4.3.1 Introduction

The ability to browse an alphabetical listing of documents would be an effective way of finding documents but the capability to search would be vastly superior. Use this section of the document to establish the use of a search capability.

#### 7.4.3.2 Capability

<<state the search capability available, refer to manuals where possible>>

#### 7.4.3.3 Effectiveness

##### 7.4.3.3.1 Amount searched

<<state the percentage of documents indexed by this search>>

<<state the amount of corporate information covered by the search>>



**7.4.3.3.2 Success rate**

<<state the success rate of the searching>>

**7.4.3.3.3 Usage**

<<state the usage of the search capability by the business>>

**7.4.3.3.4 Currency**

<<state the procedures used for management of the search capability, refer to manuals where possible>>

**7.4.4 Business effectiveness****7.4.4.1 Introduction**

The advantage of a search is the ability to let people find information quickly and thus reduce the duplication of effort. Use this section to establish business returns.

**7.4.4.2 Information population instructions**

Please use the following notes to assist in population of information in the following sections.

- Adjust the service rate per day.
- For typical examples (average values) adjust the resources shown and the duration required.
- Modify the scenarios as required.
- Enter typical numbers for the number of documents.
- Repeat for multiple business units.
- The results in Table VI are examples only.

**7.4.4.3 <<Business unit>>**

An estimate of cost savings to <<business unit>> over a year through effective searching is shown in Table VI.



<b>Cost savings on duplication of effort</b>				
Services \$500 per day				
<b>Task</b>	<b># people</b>	<b># days</b>	<b>Cost</b>	
create original document	1	3	\$1,500	
search but not find document	1	0.5	\$250	
find managed document	1	0.1	\$50	
edit document	1	1	\$500	
recreate document	1	3	\$1,500	
<b>Scenario</b>		<b>Number</b>	<b>Cost</b>	<b>Saving</b>
Create, not find, recreate		500	\$1,625,000	
Create, find, edit			\$1,025,000	\$600,000
Not find		500	\$125,000	
Find			\$25,000	\$100,000

Table VI. Estimates of duplication of effort through searching.

&lt;&lt;State the quality of the information used in the estimates.&gt;&gt;

**7.4.4.4 <<Business unit>>**

An estimate of cost savings to <<business unit>> over a year through effective searching is shown in Table VII.

<b>Cost savings on duplication of effort</b>				
Services \$500 per day				
<b>Task</b>	<b># people</b>	<b># days</b>	<b>Cost</b>	
create original document	1	3	\$1,500	
search but not find document	0.5	1	\$250	
find managed document	0.1	1	\$50	
edit document	1	1	\$500	
recreate document	1	3	\$1,500	
<b>Scenario</b>		<b>Number</b>	<b>Cost</b>	<b>Saving</b>
Create, not find, recreate		500	\$1,625,000	
Create, find, edit			\$1,025,000	\$600,000
Not find		500	\$125,000	
Find			\$25,000	\$100,000

Table VII. Estimates of duplication of effort through searching.

&lt;&lt;State the quality of the information used in the estimates.&gt;&gt;



#### **7.4.4.5 Total saving**

<<State the total saving for all business units.>>

N.B. The impact upon the business of not being able to find a document is not mentioned.



## 8 Signoff

All participants need to signoff on there participation. Be sure that all of the questions answered by the participant are listed. Division may be business group.

The following participants from Commonwealth Bankhave provided the respective information for inclusion within this document and hereby agree that the information provided is correct.

Name	Division	Questions answered	Signature	Date
Keith Sherringham				23/12/01

