Document Locator®

Case Study > North Davis County Sewer District

> *"Document Locator is a powerful document management system. The security, auditing, version control and compliance with 21 CFR part11 help assure the quality of our documents."*
>
> **Ken Burgener**
> **Lab Director**
> **North Davis County Sewer District**
> **Syracuse, Utah**

Document Locator helps North Davis County Sewer District effectively manage water testing and analysis to meet regulatory requirements.

The North Davis County Sewer District, located north of Salt Lake City and just east of the Great Salt Lake in Syracuse, Utah, generates several dozen pages of test result documents every day. With current and proposed regulatory requirements imposed by state and federal regulations, the lab staff at the district had an opportunity to use new document management technology to manage costs and increase overall efficiency. The approach gave the staff the freedom to quickly track document revisions and approvals in a more comprehensive way. The end result will not only save money, it will also enable the entire operation to focus on delivering the most accurate water sampling test results possible for the district.

Paper inefficiencies cause information access problems

North Davis County Sewer District was drowning in a sea of paperwork. On a typical day the lab processed dozens of tests, each of which required several additional supporting documents. Managing these documents and keeping them organized was a real challenge. And finding a document when it was needed had become a daunting task.

Lab Director Ken Burgener, working with Forrest Tessen, president of Network Management Solutions, dedicated their efforts and resources to improving the network and information processing flow. After finding other document management systems too expensive, they selected Document Locator as a perfect fit for their needs.

Document Locator's deep integration with the Microsoft architecture, simple set up and operation, and full-featured document management capabilities, offered them the tools they needed at an affordable price.

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"We have tens of thousands of existing paper documents that we'll now be able to scan directly into a full document management system," says Burgener. "When I discovered the ability of Document Locator to automatically scan, index and create full text searches, I was sold on the product."

The paper inefficiencies that had continually challenged Burgener in the form of test results, revisions, messages, lab reports, project documents and email are being overcome with Document Locator.

WebTools provides after-hours access to documents

Another daily occurrence is the need to review documents beyond normal business hours, which means needing access to information in a secure environment around-the-clock. But documents were not easily accessed after hours. "It's important to have access to remote users," says Burgener. "Now with Document Locator's Web access our folks can work from home."

Staying in compliance is no longer so difficult

The National Environment Laboratory Accreditation Conference (NELAC) requires accurate recording of all paperwork and the ability to prove that a document was correctly approved.

To meet the requirements of NELAC and future new regulations, North Davis County Sewer District implemented an ISO standards compliance program patterned after the FDA in accordance with 21CFR part11 requirements. When the lab performs testing of monitored water samples for compliance with sewer and water regulations, they use Document Locator's version control and approval features to track changes, create an audit trail, and to enhance document security.

"Being able to produce an audit trail of who has accessed what document and when is very important," says Burgener. "Before Document Locator, we kept track of record evolution by hand for signature approvals. We'd sometimes forget to keep revision numbers."

Simple document linking replaces complex macros

Document Locator's ability to manage linked documents enabled Burgener to replace a series of complex macros used to update multiple Excel spreadsheets. Now he can link several supporting documents to a master document in a parent–child relationship. When the master document is opened, the linked documents open with it. In addition, when linked documents are edited, he receives a notification of the change. Plus, he can easily add additional links to the master and of course track versions.

The results speak for themselves

Using Document Locator, the North Davis County Sewer District was able to improve productivity and efficiency in the lab in order to track, approve and deliver water sample test results, meet new federal regulations, and gain secure information access.

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