

Database Overview - Tips in managing your WorkCenter Databases

There are multiple ways of managing your data and databases for your operation. In this flash video we will review a few of the more common approaches and offer suggestions on how to improve your data management and database structure.

Here is a list of the more common uses of WorkCenter in relationship to using databases:

1. **Single copy of WorkCenter using one WorkCenter database file.**
2. **Single copy of WorkCenter using more than one WorkCenter database file.**
3. **Multiple copies of WorkCenter using a single or shared WorkCenter database file.**
4. **Multiple copies of WorkCenter using more than one WorkCenter database file.**
5. **Multiple copies of WorkCenter using a single database file and sharing calendars and resource options between users.**

Tip #1: When you download WorkCenter and take the default steps, you will place the program files on your local computer. The program and database will be loaded in this folder: C:\Program Files\WorkCenter folder. The WorkCenter database file will be named: WorkCenter.mdb. WorkCenter is designed to be loaded on your local computer, terminal server or Citrix server. You can place your WorkCenter.mdb database file in any computer file that your program can access. We strongly suggest that you place the database file in a folder that you can consistently backup to ensure security of the data in case of computer failure. WorkCenter will allow you the option to backup your database file and you can direct where that database backup file will be sent in order to safeguard your data.

Tip #2: If you have decided to have multiple users accessing a shared database file, all users must be on the same WorkCenter version number. Each time WorkCenter opens the database, it will check to make sure that database is structured to run on that version of the software. If you decide to upgrade your copies of WorkCenter to a newer version, follow these instructions:

1. Close down all copies of your WorkCenter except one.
2. Update that version of the software and then close it down.
3. Open the next copy and follow the same procedures. When all copies have been updated, then all users can re-open their software and access the shared database file.

Tip #3: If you have decided to purchase multiple copies of WorkCenter or you will be using multiple databases with your WorkCenter software, we suggest you consider designing one copy of the database and then reproducing that copy. Each WorkCenter database contains many tables and major section tabs. If you spend the time to properly design a single copy to meet your company or personal and professional standards, it is very easy to duplicate the database and only design it one time.

Question: Why would I want to spend the time to customize my database?

Answer: If you customize your database and then duplicate it with a new name, all of your contact management lists, Action Plans, Reports and letters will be duplicated also. This will save you time and also ensure that your communications to all clients meets your professional standards.

Here are the major areas in the database you should consider designing and or modifying to meet your needs and professional standards:

1. Contact List Manager Lists: Create any new groups and lists in the Contact Manager in order to accomplish how you wish to filter your client data into categories for marketing and also when you design Action Plans.
2. Action Plans: WorkCenter comes standard with 7 Action Plans. Review these plans and make any appropriate changes you need. We also suggest you create any new Action Plans to meet your marketing and communications plans. After creating these plans, make sure you go back to your Contact Manager Lists and associate these lists with your newly designed Action Plans. You may also go to step #4 below and create any new letters or documents that you wish to have in these Action Plans prior to creating the plan.
3. Reports: WorkCenter comes standard with 35 pre-programmed reports for your use. Review these reports and then create any new reports that you will want in each of your databases. These reports range from contacts to loan reporting and tracking. Keep in mind, each time you create a new report, this report is a real time report. That means the next time you sync data into WorkCenter and the contact or loan data meets the filtering requirements of the loan, that data will appear next time you open your report.
4. Library: Your WorkCenter comes standard with numerous letters and email messages already programmed. You need to review these letters and make any changes you deem necessary to these documents to meet your personal needs. You should also add any of your company or personal forms to the library. You can also add graphics such as pictures or logos to each of the documents to personalize them. After you have completed building and personalizing your library of forms and documents, make sure your newly created Action Plans access the correct letters to meet your needs.

Now that you have customized your WorkCenter database file, we suggest you review the next flash video on:
Database Management - #2 Suggestions on designing and duplicating your WorkCenter Database.