DB or Not DB?

By Michael Ball

(Editor's note: This column begins a series on database applications of word processing software.

ORDINARILY, the meeting planner is not the one who keeps the computer lists of an association's membership and related data. The spreadsheets and database programs the computer specialists use may be packed with useful features, but they're not for the casual user.

Often, naturally enough, planners need to generate form letters to conference attendees, or monitor registration, and those planners who can work with such data hands-on will control how the work looks and when it gets done.

So, do you, as meeting planner, take the bull by the horns and learn DB, committing to a dedicated, full-feature meeting planning software package? Do you stay a conventional WP computer user, letting the DB priests handle the tougher software?

Or do you learn to take advantage of some of the little-used data features of your word processing program? The WP program most planners use almost all the time probably has all the capability to import, manipulate, and print selective portions of databases – even create small or large data files – without your having to learn a whole new set of commands.

Tough Call

These can be fairly complex decisions to make, and they're probably best made in coordination with your association's executives and (if you have one) data processing staff. Buying a $500 or $1,000 program is no trivial matter for many associations, and neither is the time required for a planner to learn to use the new software. And remember, such a program may mean committing the association to a new way of record keeping, or even to two databases that may quickly become quite different in content.

How to decide? On one hand, the standard import, data file, sort, search, and mailmerge features that come with most WP software can help you get a lot more out of the program you already know and use. And you can learn the extra features of the software at your own pace, one at a time if you wish.

On the other hand, there is nothing intuitive about DB software, which does complex tasks using intricate commands. Yet, even complex software becomes easy if you learn only the features you need and if you use its major capabilities at least every day or two. Even with all the hidden features of word processing, sometimes there will be no adequate substitute for database software. The kind of meetings you plan, how your association keeps member lists, the way you work, the way your organization works, all are considerations as you decide which software course to take.

Go with WP ...

In general, you should look to your word processing software for your data processing needs if you:
• only occasionally need a database.
• use word processing every day.
• work for an association using a complex database whose commands confuse you, or if the DB users spend lots of time buried in manuals.
• use more than one type style in mailmerge letters.
• need graphics from non-DB programs in reports or correspondence.
• add frequent comments to entries.
• need DB mostly as an address book.
• use only a small portion of the main association list.
• need to edit the main list as you work.
• require output formats the DB software does not offer.
• need several different versions of a file for word processing and scheduling.
• use a computer-desk or laptop - that is limited in hard-drive space or processing power.

Or Use DB...

You should seriously consider making the jump to database software if you:

• do complex sorting or filtering from a long list.
• add new columns frequently.
• need to calculate and graph numeric data as part of mail merge.
• find your association's main database changing frequently, particularly the data you need most often.
• update your association's data yourself.
• use DB software routinely for non-meeting-planning tasks.
• need to trade files to and from a spreadsheet.
• have no mail merge, sort, or conditional statement features in WP
• do not need to integrate data directly into a mail-merge document or report.
• work for an association with a sophisticated DP department that performs DB outputs and will train staff in DB management and solve problems quickly.
• work already with a networked PC or large computer/terminal system.

Of course, you might consider a middle ground, an integrated package. These have not received as much user support as stand-alone software. They generally include a spreadsheet. WP. DB, and some form of graphics. They allow some transfer of data between modules. Although they may seem like something for everybody, they are not powerful enough for many sophisticated users.

Unless you're certain about the course you need to take. you may be better off taking your WP software to its full potential before trying anything else. Your WP manual can introduce you to the extra techniques available to you, and in the next column we'll begin to walk you through the ways you can apply these new tricks to your work.

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