What Can Document Management Do For You?

First of all, document management is not for your documents, it's for your users and your business objectives. Document Management puts you in control of the knowledge institutionalized within your organization. Studies suggest that 80 percent of a company's "knowledge" is stored as non-structured data, such as documents. A document management system is the means to impart structure, organization, and accessibility to this knowledge store.

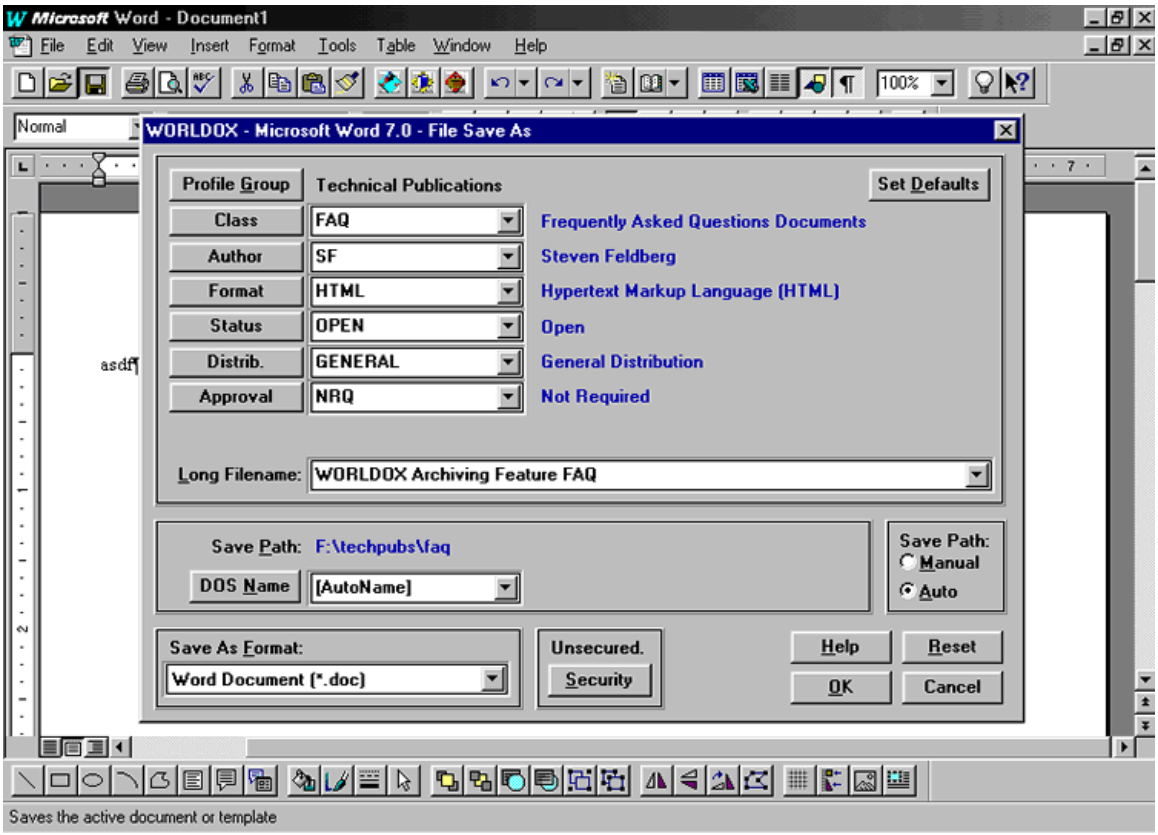
Document management is a broad discipline that offers a variety of services and features that can be addressed within the following categories:

- Library services
- Network support
- Document security
- Full text retrieval
- Document viewers
- Version control
- Document History
- Access control (Check-in/Check-out)

Technologies such as imaging and workflow, which are closely related to document management are often lumped into the document management mix.

Library Services

Library services comprise the core set of document management functionality. It is a broad term that encompasses saving, cataloging, and retrieving files. When you use a document manager to create a file, you generally are required to fill in a profile card. The thumbnail image below shows the WORLDOX Save As window for a profile group we use to manage our technical publications here at World Software.



The profile card includes spaces to fill in information that will help users manage and retrieve the document. This includes custom fields, a descriptive file name, security attributes, and additional file attributes which are filled in automatically, such as Author, file creation/update date, document number, path location, and so on.

Network Support

Network support provides the tools necessary to work with network drives and resources from the document manager in a way that is transparent to end-users. Network support, for example, provides users with single-point-of-access document retrieval, no matter how dispersed the documents may actually be on the network. It also means providing the system administrator with a straightforward methodology to integrate the document manager with the network. WORLDOX also includes a mirroring facility which copies down files to the user's local hard drive as they are accessed from the network. This ensures that in the event of network failure, users can continue to work. When the connection to the network is restored, WORLDOX automatically re-synchronizes the mirror files with their network counterparts.

Document Security

Document security places the DMS at the focal point of access and permission to the document repository. Document security involves documents, users, and groups of users. The DMS assigns rights and permissions to documents based on individual users, groups of users, and the roles in which users serve within the organization.

Full Text Retrieval

A true document manager must provide several avenues that users can go down in order to find information. Full text retrieval is a critical route of access to information that cannot easily be categorized or represented within the document profiling structure. Full text searching gives users wide-open access to their documents by framing searches based on concepts rather than categories. Full text retrieval is a two-part process. In the first part, a text-indexing engine extracts each word from all the documents cleared for searching. This information is used to construct an index to the documents.

The second part of full text searching is the actual search, wherein users specify criteria—words, combinations of word, phrases, expressions, etc.—that are searched against the index. Each document matching the search terms is returned as a "hit." WORLDOX includes integrated file viewers that highlight each occurrence of a search term in the returned documents.

Document Viewers

An enterprise-level document management system is called upon to manage more than one type of file. In a typical installation, the DMS is managing word processing files—often generated by more than one word processing program—spreadsheets, data tables, image files of various formats, project files, HTML files, and so on. As these files, or objects, are under the control of the DMS, it must provide a means to view these files. WORLDOX, for example, includes files viewers for more than 150 file formats. The file viewers are integrated into the program such that text "hits" found during searches are highlighted in the viewers. WORLDOX viewers also offer cut-and-paste to the Windows Clipboard, and can serve to display output from various operations, such as comparing two documents.

Version Control

A document *version* is an instance, or draft, of a document saved as a subsequent revision of a prior draft. By creating discrete versions of a document, it is possible to retrace its evolution. Document versions generally run linearly, such that version 2 follows version 1, version 3 follows version 2, and so on. Some document managers, including WORLDOX, enable users to create branches, or sub-versions. When using sub-versions, version 1 (called a major version) may be followed by version 1.1 (a

minor version), then by version 1.2. At some point a new major version, version 2, is created. A DMS that supports version control must allow users to spawn new versions, within accepted guidelines, to return to prior versions, and to offer tools to work with versioned documents, such as redline comparison.

Document History

Since documents are so vital to the success of any information-based organization, it is essential maintain a historical activity record associated with each document. Document histories, also know as audit trails, provide this within the framework of the DMS. A document history report in WORLDOX, for example, describes each action in the life of a document including who performed the action, its date and time, and the nature of the action itself. Manager-level users in WORLDOX can view a history report on any document managed by the DMS.

Access Control

As networks have become commonplace, so too has collaborative authoring and editing of documents. A document management system must provide some way for multiple authors to coordinate activities across one or more documents. One of the primary means for doing so is to implement a document check-in/check-out regimen. When a user checks out a document, he or she has the option of "locking" it so that other users can view the document, but cannot make any changes to it. This prevents problems that may arise when several workers attempt to edit the same document at the same time. With check-out, only one worker may edit a file. When finished, the worker checks the document back in through the DMS, making it available to other users once again.