

# Best Practices in Document Management

## Establish a Best Practice Framework

What How Where Who When Why Task & Method

## Implement Roles & Responsibilities

Create

- Accountability

## Define File Naming & Title Conventions

Legal Documents

Example Product Documents

- Product-A Technical Reference Manual
- Product-B User Guide
- Product-C Product Sheet

## Location, Location, Location

User Analysis

## Implement Single Source Publishing

Single Location

Single Source Publishing (aka Multi-Channel Publishing)

## Tailor Your Workflows According to Your Needs

Swim-Lane Flowcharts

## Define What Metadata You Require

Document Metadata

## Develop a Strategy to Conduct User Analysis

- Defines fictional or actual audience
- Clarifies who the user is
- Drives end-to-end documentation (holistic)

## Implement Modular Documentation

Structured & Modular Content

- Better management & re-use
- Target any deliverable
- Output in multiple formats

## Create, Use & Maintain Style Guides

Style Guides

- For textual content, diagrams, audio, video, etc.
- Guidelines for consistency, format, design

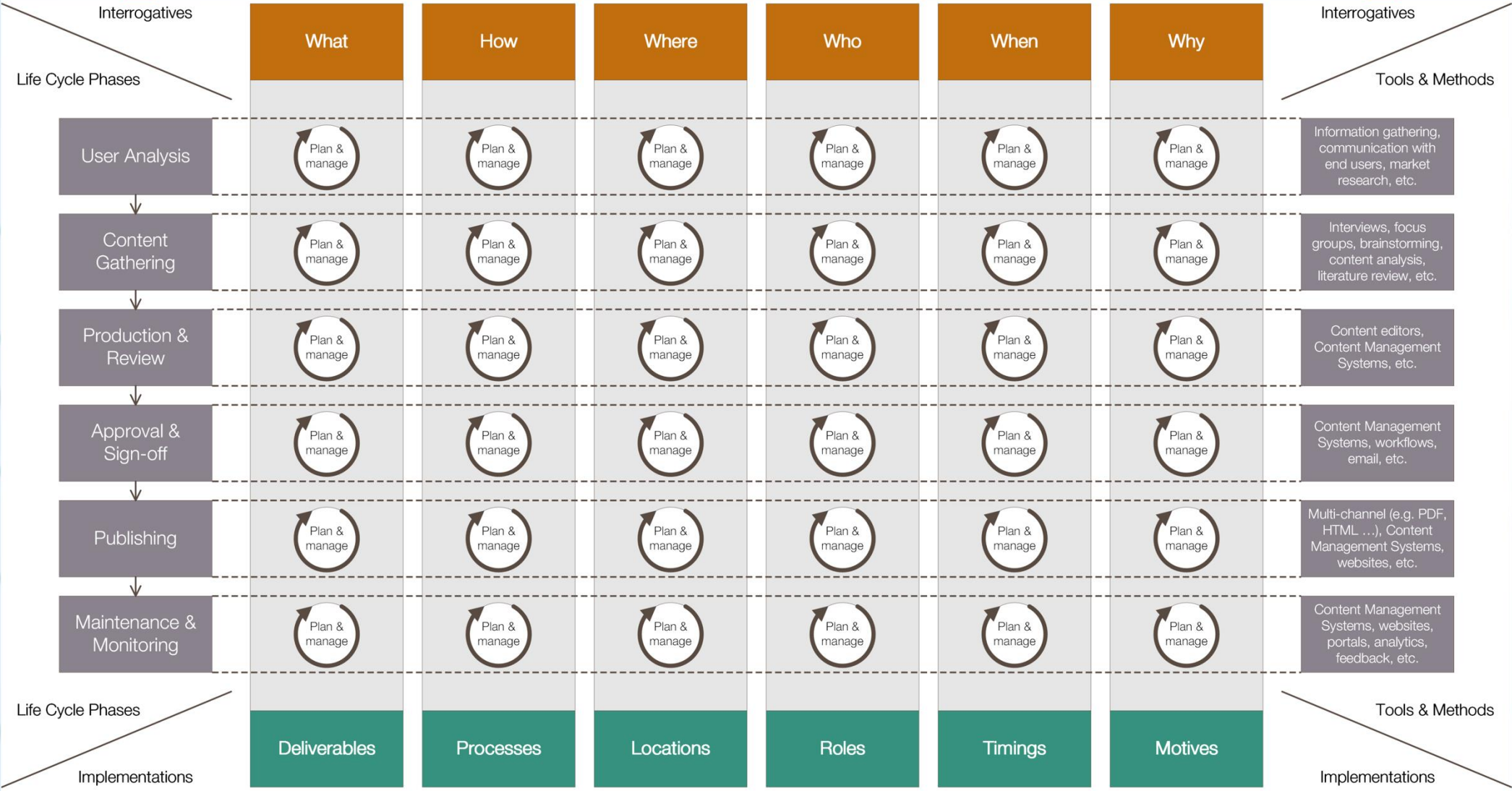
## Keep a Shared Glossary of Common Terms

Glossary of Terms

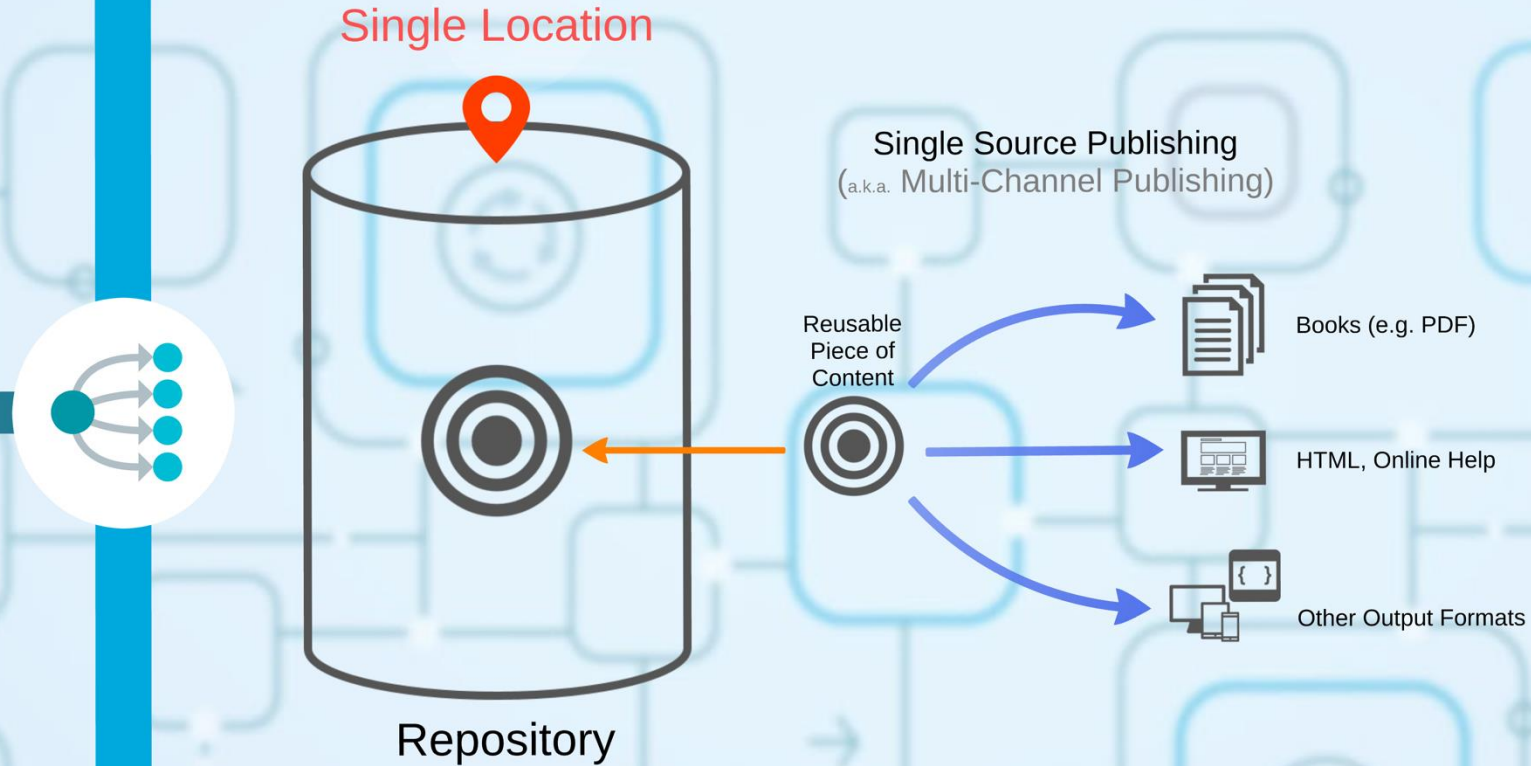
- Good for employees
- Consistent use of terms
- Reduces confusion & clarifies meaning
- Context is important!

## Incorporate Knowledge Management Principles

# Establish a Best Practice Framework



# Implement Single Source Publishing



- Makes translating content easier
- Significantly better reuse
- Better for collaboration
- More control over publishing

- Requires change in attitude towards documentation
- Acquire appropriate systems
- Avoid reinventing the wheel
- Avoid over-engineered solutions





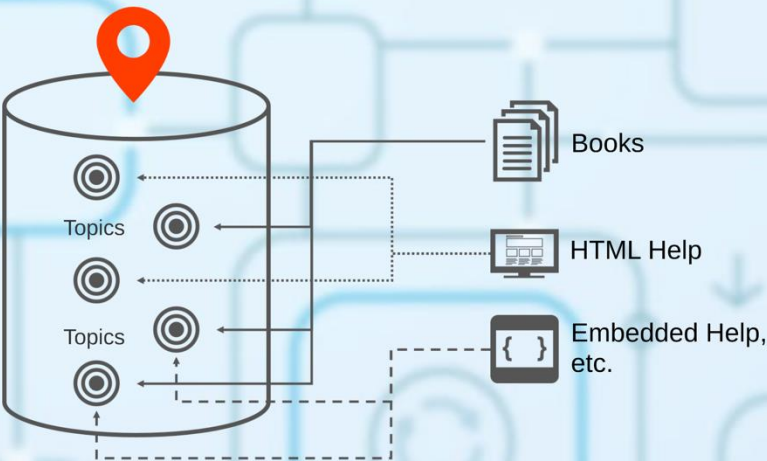
# Implement Modular Documentation

## Darwin Information Typing Architecture (DITA)

- XML-based architecture
- Modular documentation standard
- Paradigm shift (change in philosophy)
- Useful for technology & engineering companies (but not limited to these)



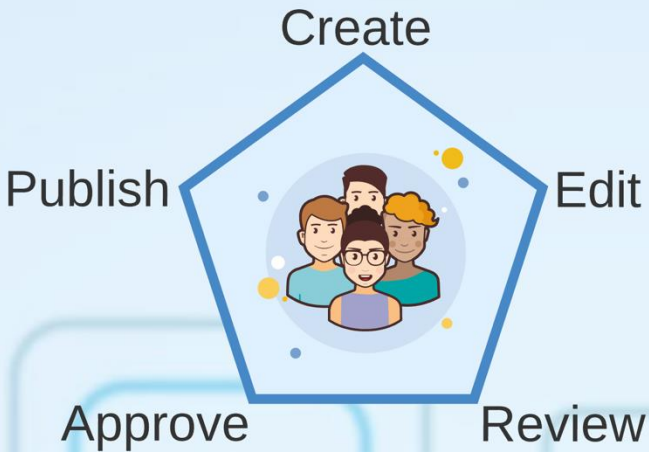
## Structured & Modular Content



- Improved user experience
- Better feedback
- Improved collaboration
- Better workflows
- Improved publishing capability, etc.

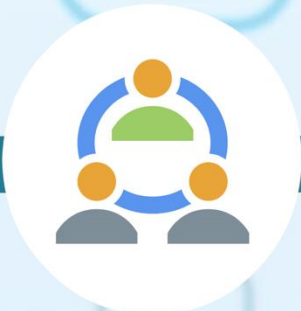


# Implement Roles & Responsibilities



- Accountability
- Clear definition of roles
- Track roles & responsibilities
- Responsibility matrix
- RACI model

Deliverable, section, topic, etc.	Responsible	Accountable	Consulted	Informed
Literature survey	Tish	Bob	Tim	Ash
CMS specifications list	Tish	Tim	Business analyst, CMS developer	Engineering, customer support
Store communication	Luisa	Senior merchandiser	Buying, product development	Web services
WSSI	Luisa	Senior merchandiser	Allocation, buying	Stores, product development

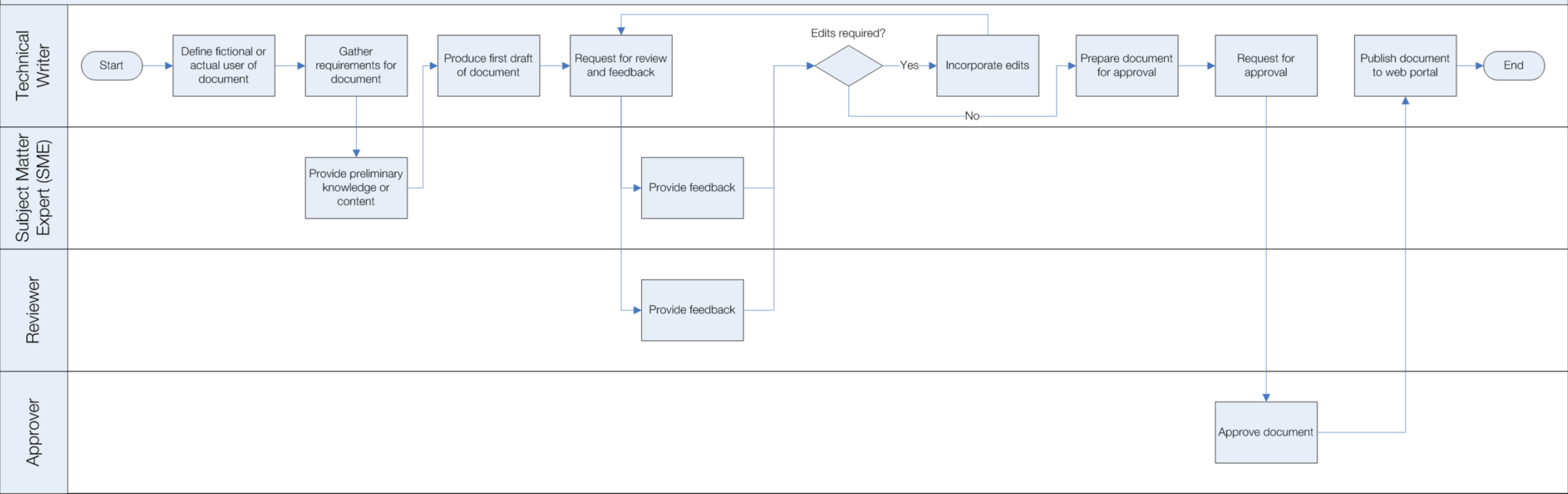




# Tailor Your Workflows According to Your Needs

## Swim-Lane Flowcharts (a.k.a. Cross-Functional Flowcharts)

Produce a new software user manual





# Style Guides



## Style Guides

- For textual content, diagrams, audio, video, etc.
- Guidelines for consistency, format, design, language, etc.
- Serves as reference document to produce quality documentation
- Based on consensus



### Plan Your Document Title



- Rules matter
- Avoid title changes
- Is keyword capitalisation needed?

### Consider Document Attributes



- Deliverable types
- Three-letter acronyms
- Relevance
- Other metadata

### Convention for Document Revisions



- E.g. [major].[minor][minor]
- Security classification codes
- Document & filenames

### Standards for Formatting & Styling



- Create templates
- Write guidelines
- Language & grammar





# Define File Naming & Title Conventions

## Example Legal Documents

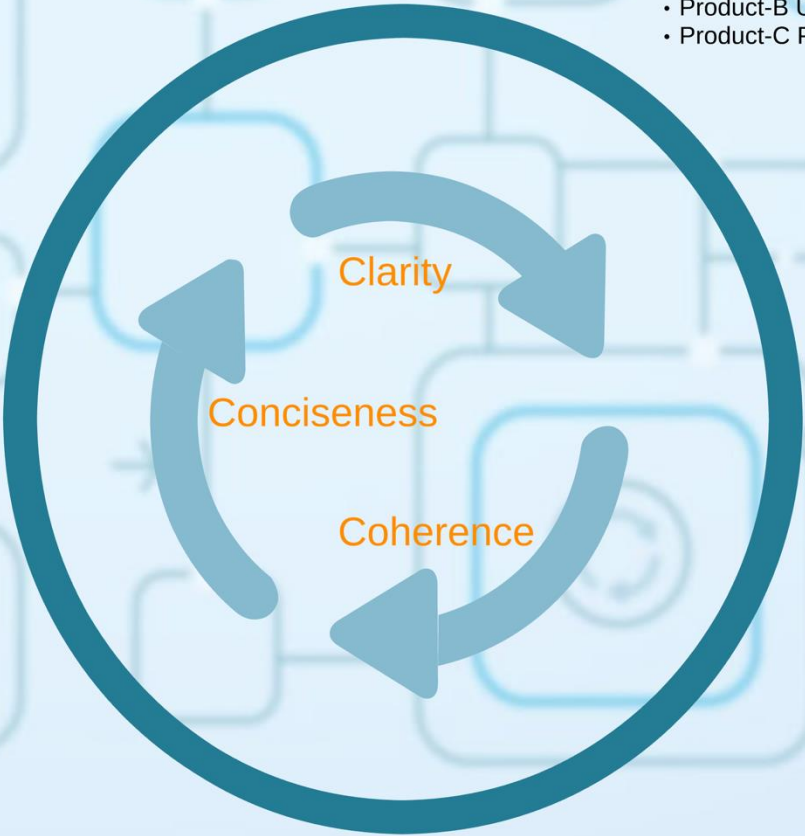


- Executed Agreements:
- Customer A - Executed
  - Customer B - Executed
- Non-Disclosure Agreements:
- Customer A - NDA
  - Customer B - NDA

## Example Product Documents



- Product-A Technical Reference Manual
- Product-B User Guide
- Product-C Product Sheet



Document Attributes  
or Metadata







# Define What Metadata You Require



## Document Metadata

Example Document.docx Properties

General Summary Statistics Contents Custom

Title: Example Document

Subject: For Illustration Purposes

Author: Tish Chungoora

Manager:

Company: Udem

Category: Tutorial

Keywords: Training, Development, Learning

Comments:

Hyperlink base:

Template: Normal.dotm

☐ Save Thumbnails for All Word Documents

OK Cancel

Example Document.docx Properties

General Summary Statistics Contents Custom

Name: Department

Checked by Client

Date completed

Department

Disposition

Type: Text

Value: Technical Publications ☐ Link to content

Properties:

Name	Value	Type
Department	Technical Publications	Text
Status	Draft	Text
Confidenti...	Public	Text

OK Cancel

- Support for search & content retrieval
- Support categorisation & location
- Support workflows
- More meaningful content (self-describing)



# Keep a Shared Glossary of Common Terms

## Glossary of Terms

- Good for employees
- Consistent use of terms
- Reduces confusion & clarifies meaning
- Context is important!

## Tracking Glossary Terms

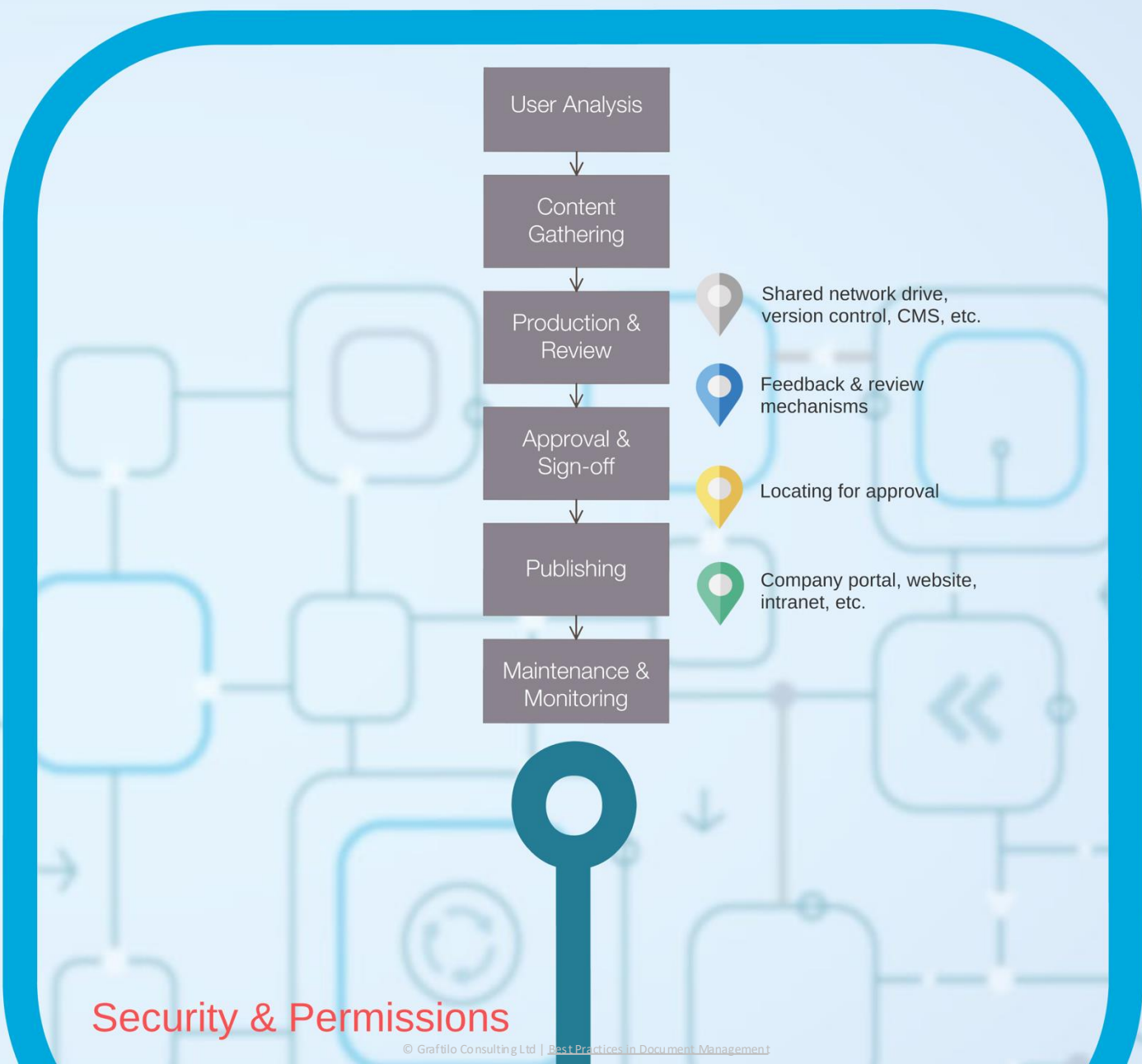
Term	Context	Definition	Synonyms	Example of use
Ontology	Philosophy	Ontology is the philosophical study of the nature of being, becoming, existence, or reality, as well as the basic categories of being and their relations	...	Metaphysics and ontology are closely related topics
Ontology	Information science	A formal, explicit specification of a shared conceptualization	Knowledge model	DITA to some extent is a lightweight ontology for content authoring
Lightweight ontology	Information science	A less rigorously formalized knowledge model	...	A visual representation of a domain of interest is a lightweight ontology
Heavyweight ontology	Information science	A more rigorously formalized knowledge model	...	A heavyweight ontology contains formal axioms



- Implementation matters!
- Consider roles, workflows & processes



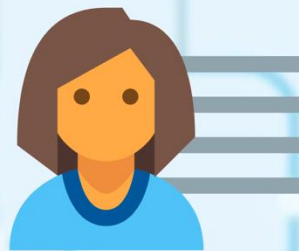
# Location, Location, Location



Security & Permissions

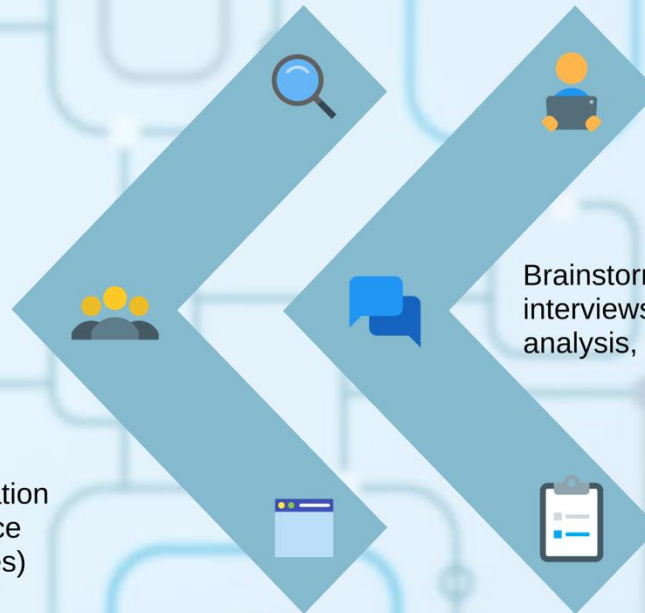


# Develop a Strategy to Conduct User Analysis



- User-centred documentation
- Assess intended audience (requirements & attributes)
- Explicit understanding of audience profiles

- Defines fictional or actual audience
- Clarifies who the user is
- Drives end-to-end documentation (holistic)



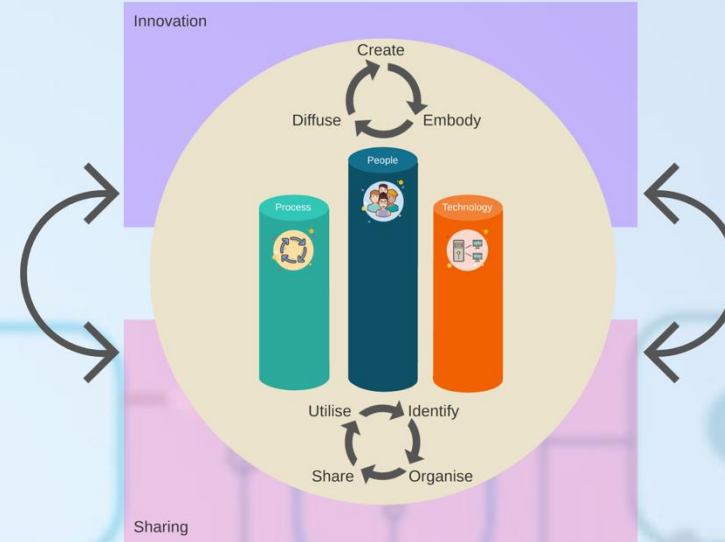
Brainstorming, focus groups, interviews, surveys, content analysis, etc.



## Audience Characteristics

- Roles & responsibilities
- Prior experience & knowledge
- Demographics, language & educational level
- Attitude towards subject matter
- Working environment

# Incorporate Knowledge Management Principles



## Knowledge Management



### Lessons Learnt

- Understand roles & responsibilities
- Knowledge maintenance & reuse
- Set up necessary workflows, systems, processes, etc.

### Sources of User Feedback

- Review processes, customers, partners, online communities, internal departments, internal systems, etc.