

Functional Practice Statements - Acquisition & Storage
<p>Level 1: Initial</p> <p>1.1 The organization has implemented basic content lifecycle and records management</p> <p>1.2The organization has a basic definition of what constitutes a record</p>
<p>Level 2: Managed</p> <p>2.1 Documents are still created and edited in the chaos of the shared folder level, but they are archived at the end of the project.</p> <p>2.2 Electronic document management is not embedded in the main business processes, so there is no applied consistency in the creation or management of documents</p>
<p>Level 3: Defined</p> <p>1.1 The organization recognizes the need for consistent organization and classification, reliable searching and an understandable security mode</p> <p>Typical questions to ask include:</p> <ul style="list-style-type: none">• What will happen if your workers are given the ability to classify and file documents however they choose?<ul style="list-style-type: none">o Imagine just 100,000 documents being imported without a mandatory classification scheme, automatic filing, automatic numbering and validation of property values.• Could someone in one office reliably find a document created by someone in another office without phoning or emailing to ask where it is?• Will the author remember where he or she filed it two months after the fact?<ul style="list-style-type: none">o Or what name they gave to it?• And whom should they phone anyway?<ul style="list-style-type: none">o Should thousands of people be phoning and emailing each other when they have a document management system? <p>3.2 The organization has developed a strategy for a security model</p>
<p>Level 4: Measured</p> <p>1.1 Technology has been implemented that provides the following functionality:</p> <ul style="list-style-type: none">• audit trails• non-linear lifecycle management• electronic signatures• watermarking• title block synchronization• revision control• reference file management• reference file binding and rendering.
<p>Level 5: Optimized</p> <p>5.1 Integration exists across enterprise applications</p> <p>Once an organization has control over its documents and intellectual processes, it can effectively begin sharing across organizational and application boundaries.</p> <p>Integration is primarily about:</p> <ul style="list-style-type: none">• Transferring ownership to/from external organizations and applications• Linking documents to/from external applications• Publishing information into a form and format that is suitable for the recipient