The Organisation As A System

The Old Geek

Structured Coherent Design

15. Document Management – Key Players

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The slide deck set:

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15. Document Management – Key Players

About the Author:

- Allen Woods, recently retired.
- Ex British Army (1971 – 1995) Taught Arctic Warfare, Several Years On Operations, Self funded through College to Study IT
- Chartered Member of the British Computer Society for 20 years
- Member of the Chartered Status Interview Panel for BCS
- In 2010, Finalist of UK "Developer Of The Year" Competition for HSIS
- Primarily Employed in UK Defence Supply Chain and Logistics IT since 1995 until 2019
- Credits: MoD Health and Safety Information System, Various Internal to Defence P&G Portals, CATMIS, IQB Oversight to Defence Voyager Programme IM Transformation

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A Bit of Revision
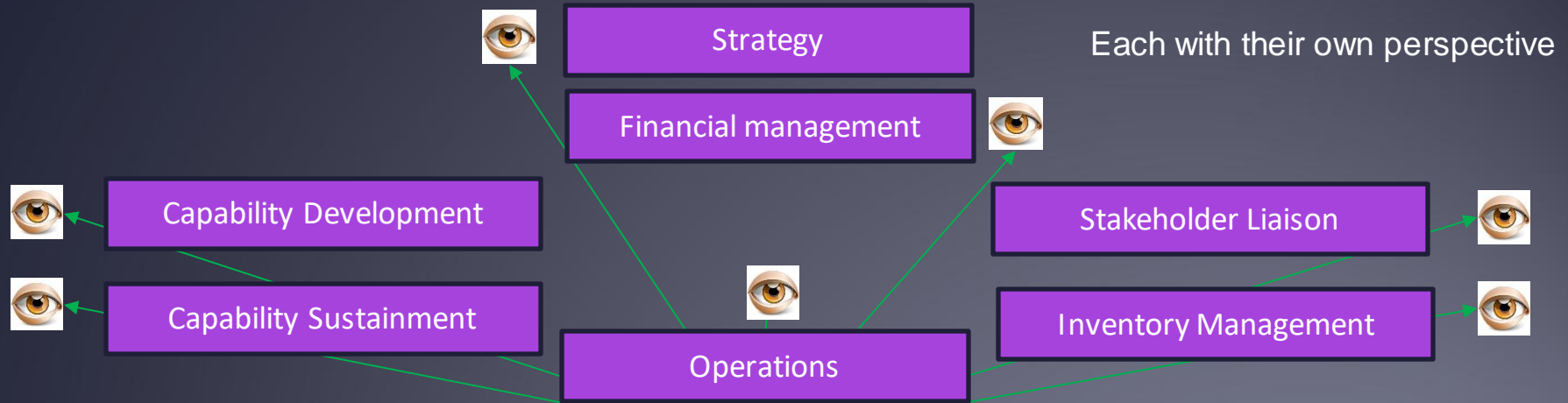
The [The Introduction](#)

The [Conceptual Schematics](#)

Part 1 - The Enterprise Is The System

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The Organisation as a System

Strategy

Financial management

Capability Development

Capability Sustainment

Stakeholder Liaison

Inventory Management

Operations

Each with their own perspective

Each do….

5	Policy and Governance

The One Dataverse..

1	Operations

4	Decision Support

3	Monitoring

2	Co-ordination

Each with its own context
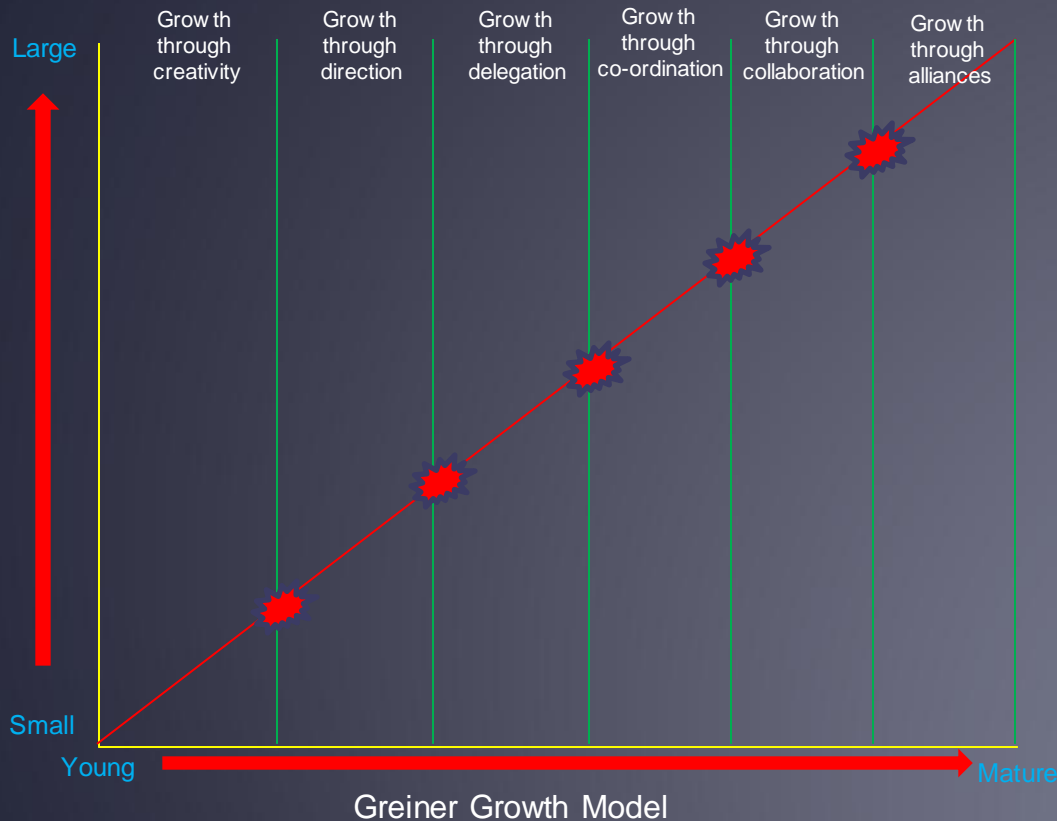
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As the Organisation Grows…

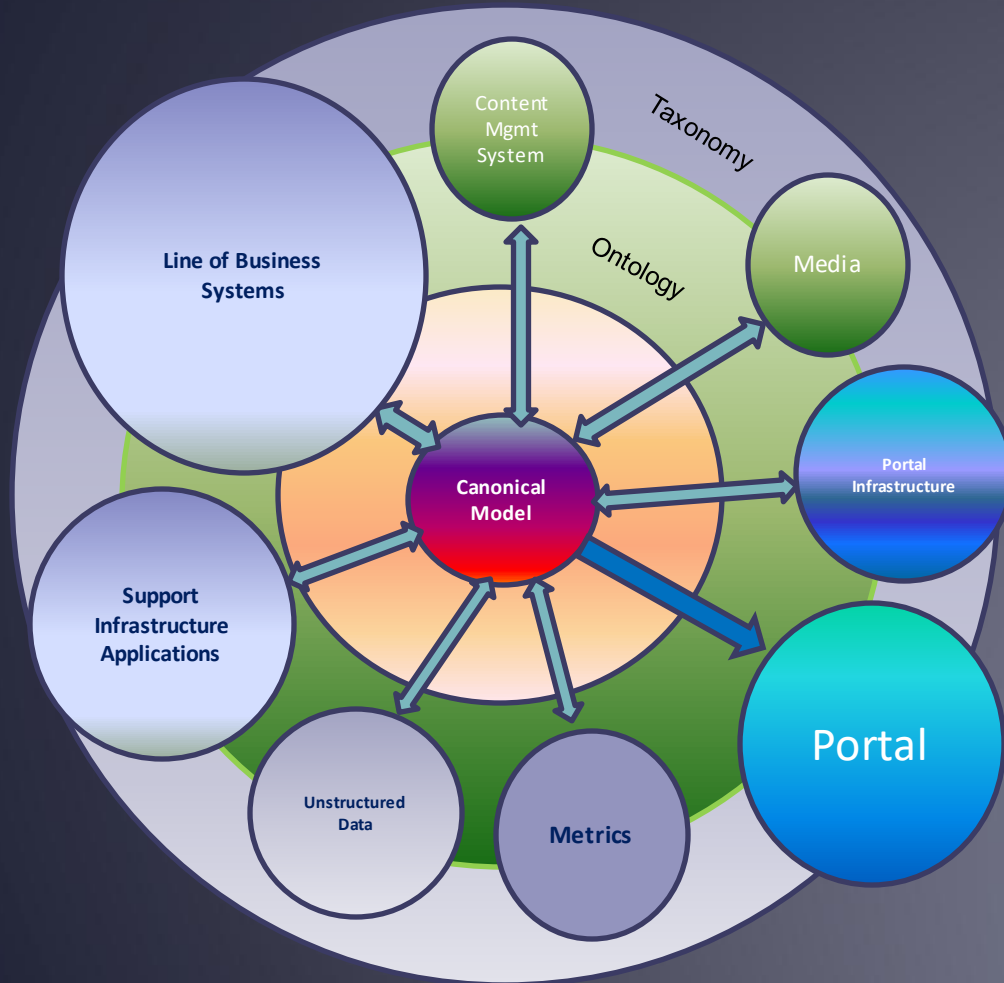As the organisation matures, so bureaucracy grows..

The Organisation Matures In Respect Of Capability

Controlled Entry To The Dataverse

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Multi Perspective Gateways

CONUSE
(concept of use)

Economic

Efficient

Effective

Evolve

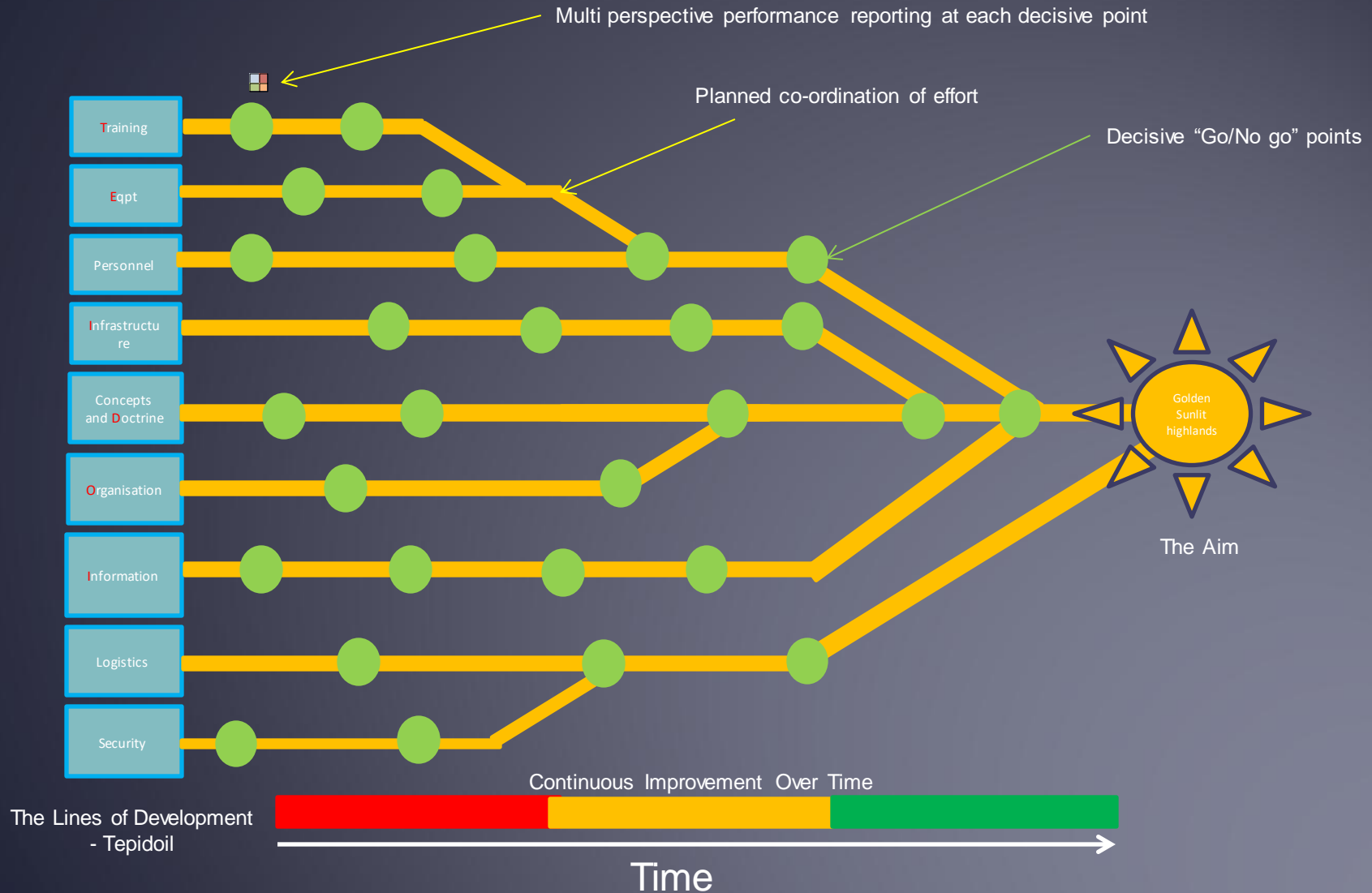| CONEMP / CONOPS	Why	How	When	Where	What	Who
Strategy	Vision	Plan	Year	Country	Env	Customer
Policy	Mission	LOD	Month	Province	Capability	TOR
Governance	Objectives	Decisions	Week	Town	Platform	Dept
Standards	Process	Legislation	Day	Street	Asset	Branch
Rules	Procedure	Compliance	Hour	Facility	Assembly	Team
Metrics	Task	Audit	Minute	Location	Part	Role
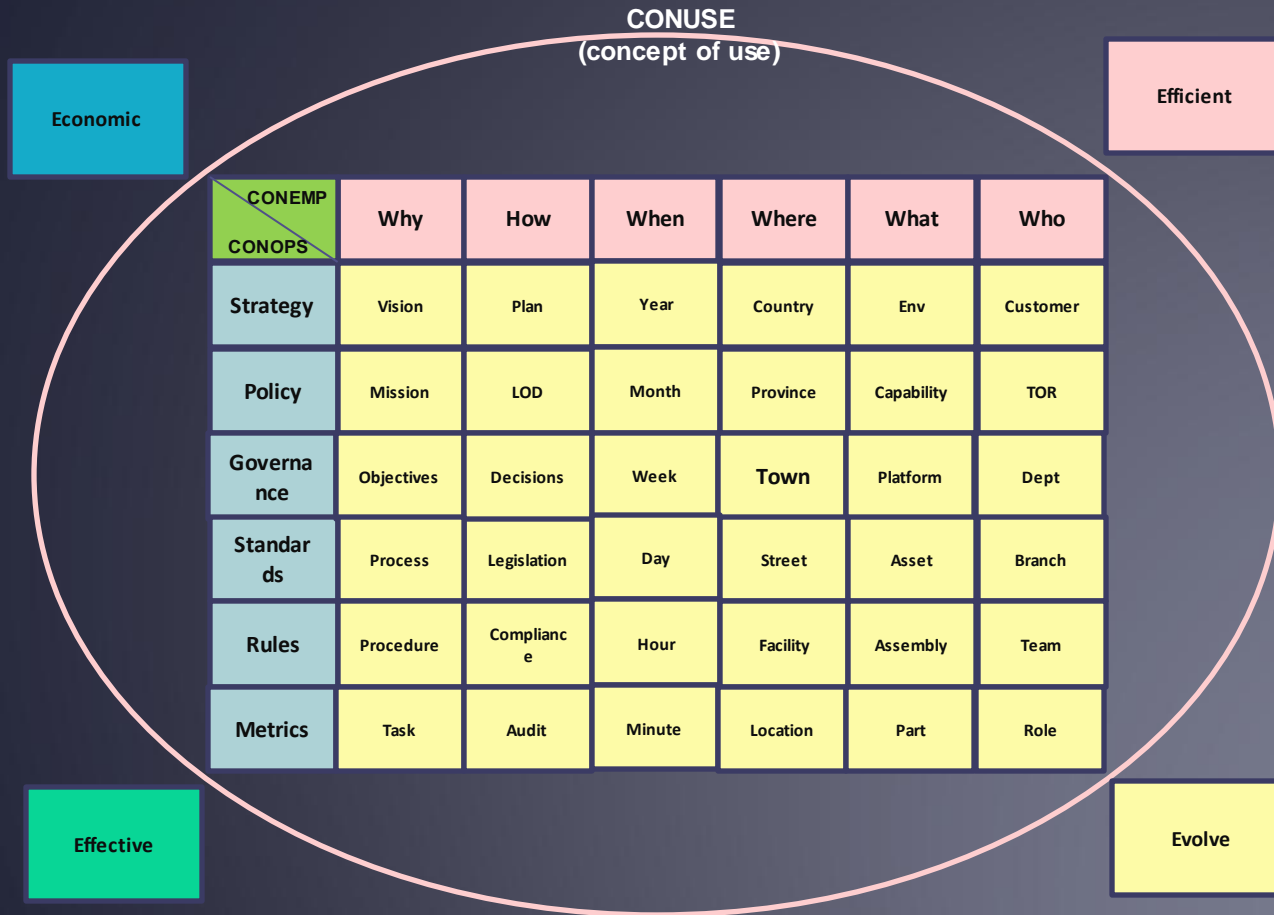
Things, Relative to Each Other In Time and Space

Thing
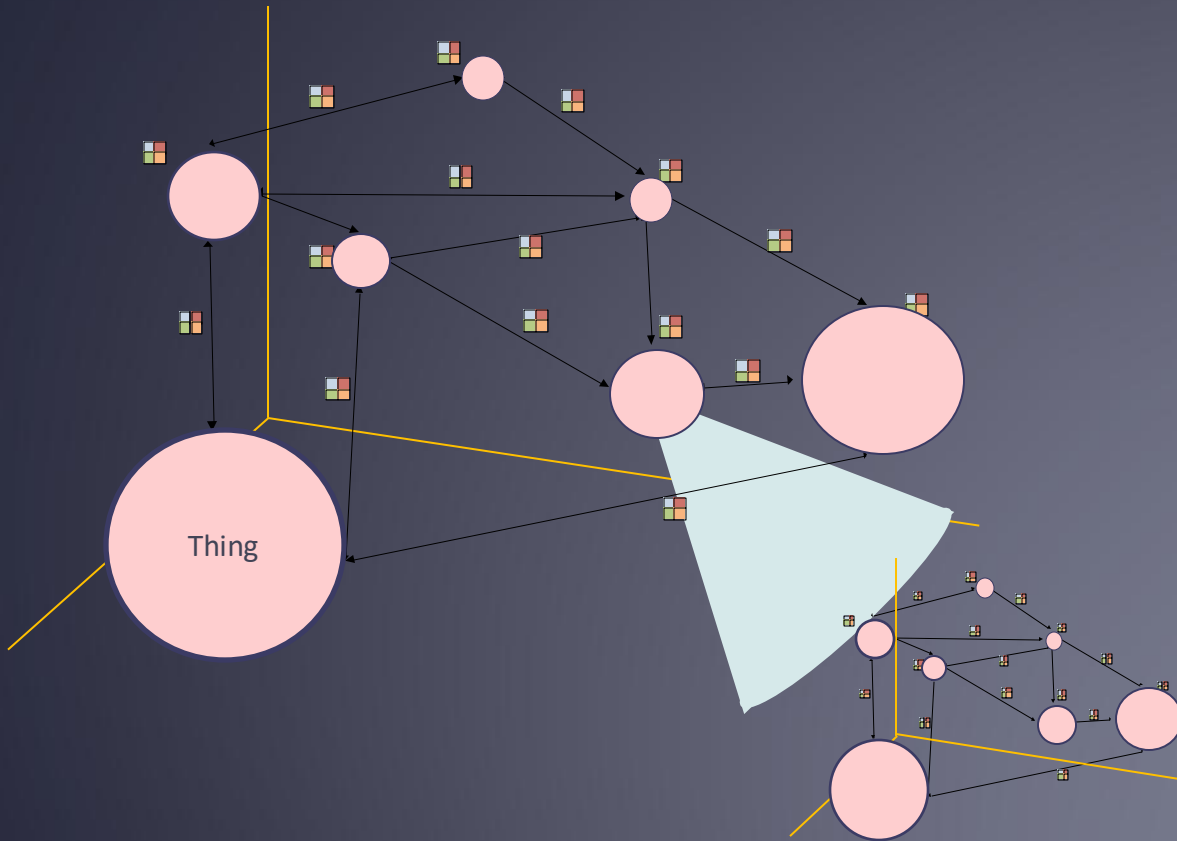
Fractal like decomposition as the information requirement gets more specific

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Co-ordinated Lines of Development

Multi perspective performance reporting at each decisive point

Planned co-ordination of effort

Decisive "Go/No go" points

Training

Eqpt

Personnel

Infrastructure

Concepts and Doctrine

Organisation

Information

Logistics

Security

Golden Sunlit highlands

The Aim

Continuous Improvement Over Time

The Lines of Development - Tepidoil

Time

Part 2 – Mapping the Enterprise

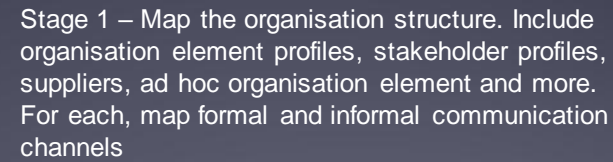# 15. Document Management – Key Players

The Organisation IS the System. Map Form, Function and Purpose
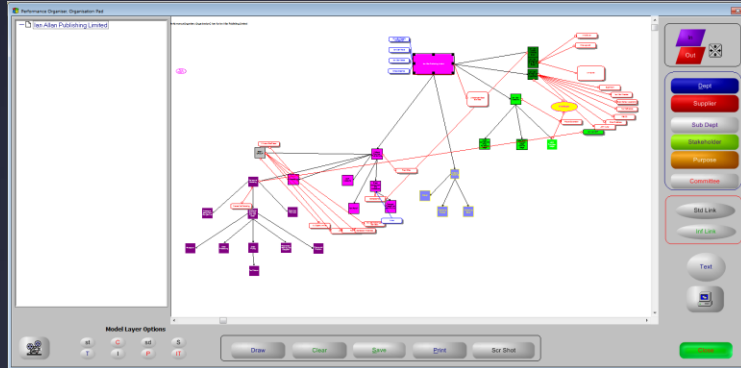
As part of the design effort to specify the role "Task Terms of Reference" (TTOR) for a variety of appointments and tasks, a digital organisation map was produced that:

1. Gave the means to map the relationships between an organisation's component parts

2. Provide the means to support "value stream" plotting in the form of graph schemas on a "start anywhere" basis

3. Subsequently, once a map had been completed, act as a change lever in its own right by providing the means to experiment with "fit" between "things" by altering connection pathways

The General Mapping Method

Stage 1 – Map the organisation structure. Include organisation element profiles, stakeholder profiles, suppliers, ad hoc organisation element and more. For each, map formal and informal communication channels

Stage 2 – Zoom in to area of interest, in this case "Librarian" as a Quality Assurance role

Stage 3 – For each organisation element, create a process catalogue

Stage 4 – Support process mapping on the basis of "catalogue as gateway" into the wider catalogue itself

Stage 5 – Map individual processes following any symbol form, applying the taxonomy "Process"

Stage 6 – Map interfaces between process steps and: Performance metric profiles, documents, individual roles, individual assets.

Stage 7 – Generate "start anywhere" graph schemas from any organisation element supported in the map (objectives, departments,, processes, performance metrics, resource profiles etc) follow the path where it takes you

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The Architectural Benefit?

The organisation map provides "the glue"

That gives easily understood context to data transition and attenuation exercises from raw data to information

That provides the design foundation for multi perspective ontologically coherent gateways

That provides the basis for the design of a portal that facilitates the delivery of timely information that is contextually coherent
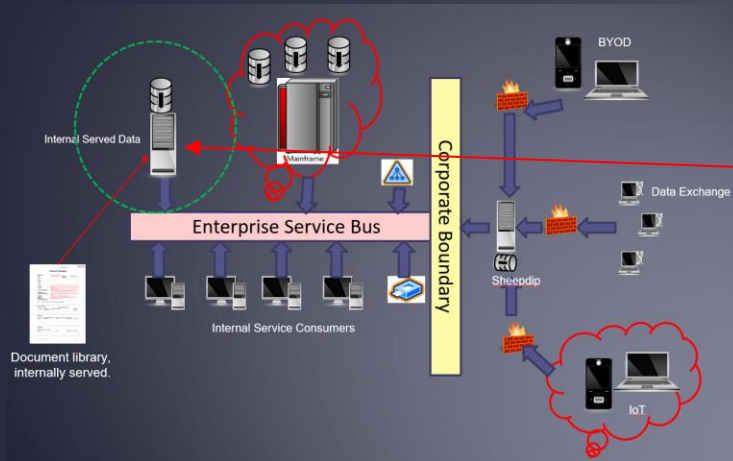
That can be presented on the basis of local information need

That gives decision making power to "the edge"

Map Security

An organisation map, once produced and installed as part of a portal…

The map and portal in combination are highly sensitive and therefore should not be visible to third parties

Both the map and portal should be stored internally

A map and portal combination are a change lever in their own right in that changes to the map, both in turns of map structure and content can be reflected immediately in the portal

A map and portal combination facilitate the concept of "living documents" in that authority to edit and amend text can be granted to subject matter experts in the various organisation elements contributing to map detail

A map and portal combination over time, reduce the administrative burden of maintaining documentation associated with compliance with quality assurance standards like (but not limited to) ISO 9000

The Map Origins
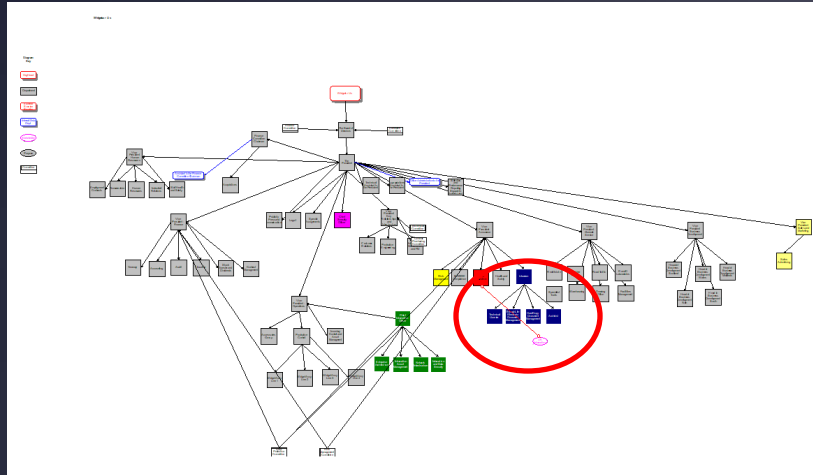
The key roles, mutually supportive, that influence the design of the document management regime were:

The Vice President Quality Assurance

The Librarian

The Data Protection Officer

Technical Asset Manager

You of course, may decide differently! The map provides the means to experiment…

For this and other mapping exercises, a combination of organisation charts draw from a variety of management science books were used to generate a "generic" organisation map.

In support of the organisation chart, several years ago free to download catalogue of:

    A process catalogue

    Associated business objective summary profiles

    Key Performance Indicators

Were drawn from the US AQPC

The combination giving the means to build a generic model of an organisation structure with which to "play" with key roles related to data protection generally and position them in an appropriate manner. The management position of such roles, after a number of mapping iterations was to place them under "Quality Assurance" rather than technical.

Part 3 - The Key Players

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Key deliverables during the positioning of both DPO and Librarian roles, recorded in the map included:

A role review case study

A role Task Terms of Reference (job description)

A role objective profile catalogue

A role process catalogue

A role performance metric catalogue

All available "on line" as living documents in the portal

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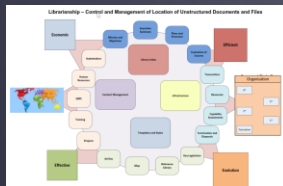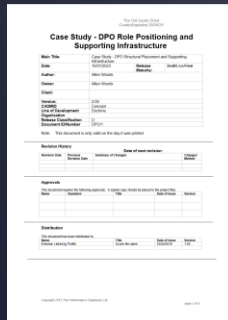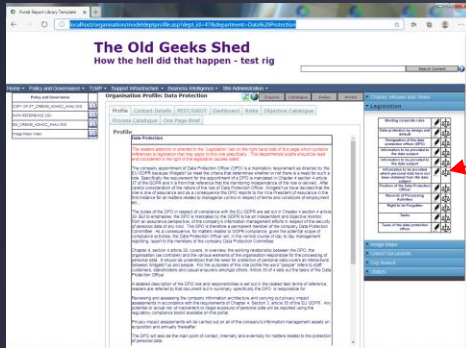## Role Based Information Integration

Supported by:

The means to cross reference clause specific legislation

Integrated performance reporting

Active "image maps"

And more…

With documents accessible from a central library managed and operated by the librarian on a "through life" quality assured basis..

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That's all folks…..

The original deck and others, are available on request, free, using any of these means to get in touch:

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