

The Organisation As A System

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Structured Coherent Design

1. Document Management - Introduction

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Some Revision Notes..

- These decks were first published, on a weekly basis, some 18 months ago (mid 2019)
- They are being revised and updated in respect of all manner of changing circumstances
- They are guides, not gospel, links where they are available, are, to the best of the authors knowledge, authoritative. Nevertheless, please check.
- This update, probably the last, is taking place in August 2021
- Use the slides and other material as you see fit, feel free to share
- If you are looking at this and the others in PDF form, use the email address on the last slide to ask for the complete decks and pack in their original file form
- If you would like to go through the decks, but on a one to one basis only, use the contact details at the end of each deck and ask. Something can be sorted out.
- Use, abuse, or not as the case may be, they are there to help
- An hour is usually a start time to set aside for each deck, but bear in mind, if you do ask for a one to one, an hour will not be enough.. Experience indicates you will ask questions.
- Other than that, enjoy, it is hoped the decks are useful.

1. Document Management - Introduction

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

1. Document Management - Introduction

The slide deck set:

- [1. Introduction](#) – (This deck) document management, why do it

The Operating Environment

- [2. Document Life Cycle](#)– Documents have lives of their own...
- [3. The Building Blocks](#) – Its all about the architecture
- [4. Documents Are Packages](#) – Document files have form, function and purpose beyond just the content
- [5. Legal Considerations](#) – You are all international lawyers now
- [6. Infrastructure](#) – You need to find a home, one that is safe....
- [7. Meta Data.](#) “Data” about data.

The Architecture

- [8. Naming Convention](#) – Privacy by design starts here
- [9. Document Design.](#) If there is a requirement to tap into documents for data analysis purpose.. They must be designed.
- [10. Corporate Dictionary](#) (this deck)– Not as many words as you think
- [11. Location](#) – Location, if you do not know where something should be, it may as well not be there!
- [12. The People, the Culture](#) – People do what people do. Writing with Style.
- [13. The Tool Architecture](#) – No one tool can cover it all and cookies? They don't count.

- [14. Closing Summary](#) - Wrap up..

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The aim of this slide deck set:

- To provide an architecturally sound “world view” of what document management is about
- To demonstrate and illustrate the architectural nature of document management
- To provide some documents and case studies to support the decks
- To illustrate a way that works, that facilitates the means to make document files more accessible as a database
- To do all of the above in a manner that none technical folk can understand so that they are better able to direct their technical efforts

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Caveats:

- Each deck is an overview. Guide, not dogma
- Its none technical as far as possible.
- There are no experts...
- Prove and verify through checking everything discussed and demonstrated.
- Beware of geeks bearing gifts (including this one).
- Not selling anything
- Slide decks and associated material, where possible, will be free to download
- Each deck will take about 40 mins...
- Ideally there is a need for a talk through, some more than others
- For the experts... Adjust, adapt or abuse as you see fit. You have all been in a position where you need to explain things.....

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Background

The programme of work this series of decks is based on uses a platform developed in support of the management of health and safety issues general, but the movement of hazardous materials specifically, for the UK Ministry of Defence Supply Chain. With one component exception, the platform “HSIS” was built entirely by the author and over time was used across the industry/defence divide to supply trusted documents known as “safety data sheets” (SDS) describing the nature of handling and transport handling risk from manufacturers to both defence and industry.

The numbers were huge. Potentially, all 17,000,000 identifiable items in the defence supply catalogue may or may not have required an SDS and each would have had to be acquired from the supply side (international regulation and legislation required that) then validated and checked for accuracy both as source and content, by MoD experts which, in this field, were experts.

In year 1, there were 25k documents collected and validated, by year 5, there were 400k downloads per year.

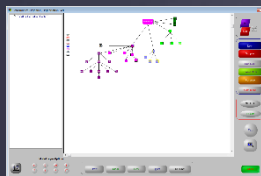
What started out as a “can you build a document download facility?” turned into a bit of a monster, as much of IT tends to do, if it works.

In 2011, a submission was made for a British Computer Society “[Developer of the year](#)” award and the programme also formed part of the content of a book on Smart Procurement entitled “[Fire](#)” both of which add background to the story.

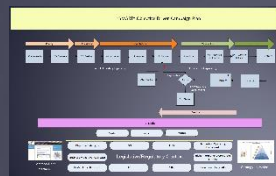
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Methodological Mix

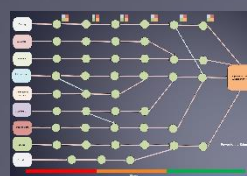
All aspects of information management are architectural in nature. This is implied by the concept of “privacy by design”. Design implies a methodological approach to the management of data and information delivery that are mutually supportive. However, no one methodology is a “silver bullet” because of the limits of observation and the need to understand and manage the impact of “control inversion” and “inferential distance”.



Form



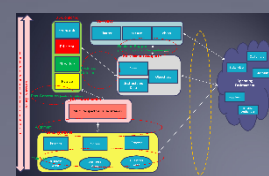
Function



Purpose



Context



Viability

No one methodology is a silver bullet because of the limits of observation. The development of HSIS was founded on a [mix of design methods](#) applying a number of approaches as a composite.

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Some Basic Operating Principles

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Operating System and Office Automation

The two key decisions are:

Your choice of operating system

Your choice of office automation software (for these decks, the option was MS Office in various versions).

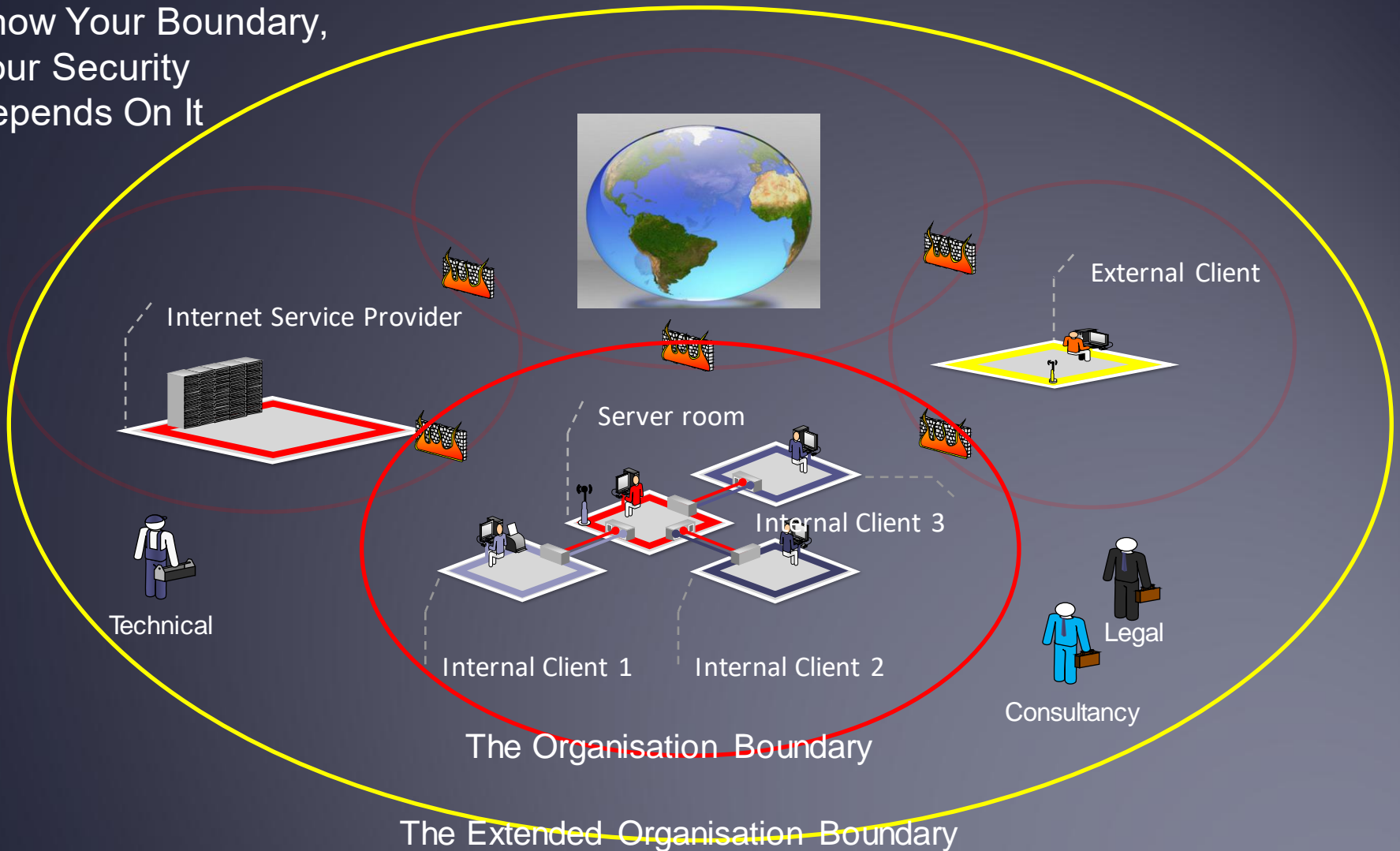
For both, read T&C

For both, be aware of what you actually own.

For both, the dependency on product security features is existential

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Know Your Boundary,
Your Security
Depends On It



**Nothing goes over (in or out) your organisation boundary without approval.
Anything going over your extended boundary you have no control over whatsoever**

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To Infinity and Beyond

Bear in mind, when “stuff” goes beyond your extended boundary you lose ownership and control of location.

That of course, includes Bring Your Own Device (BYOD)

With the further complications that :

- Your organisation cannot audit devices it does not own because it has no legal right to audit

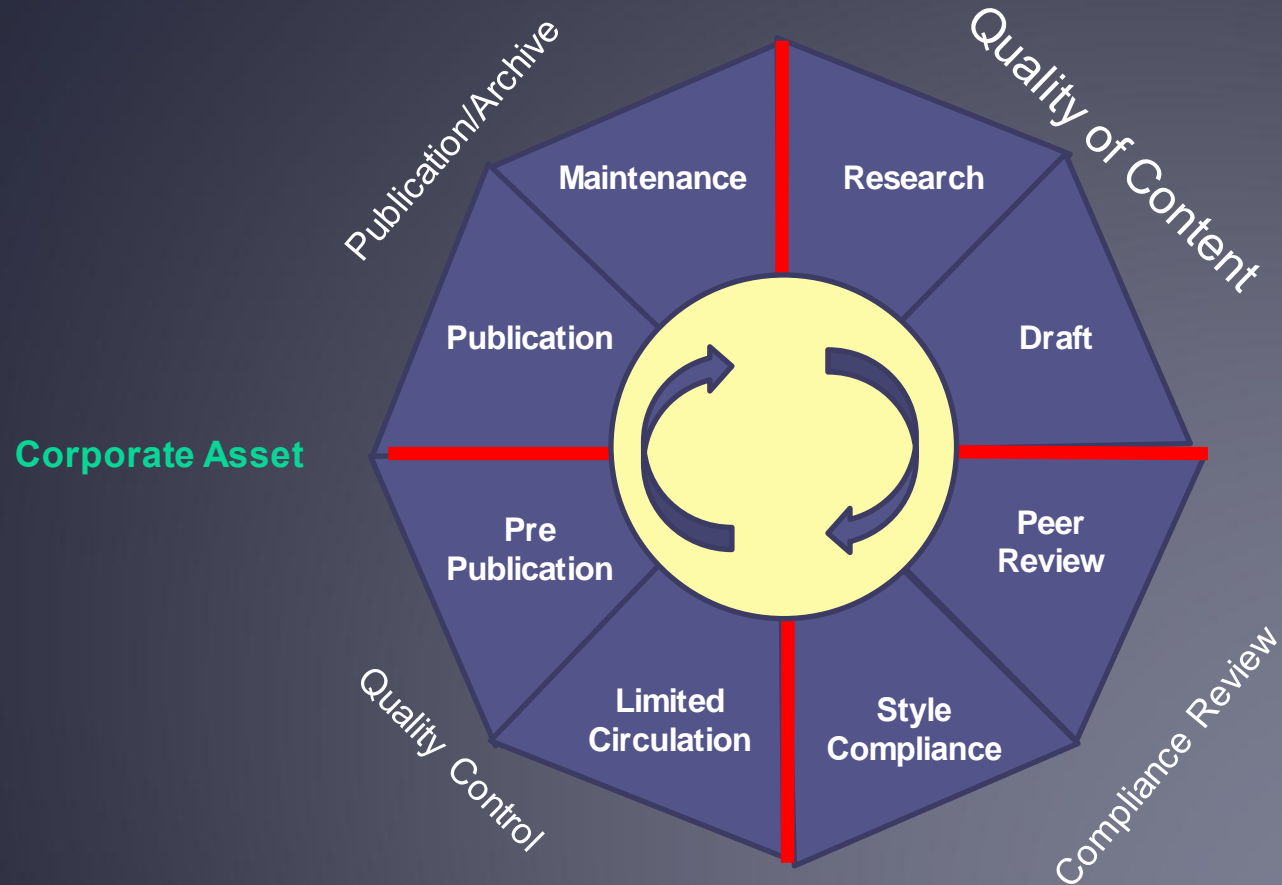
- It is likely you allow multiples of operating systems and other tools, each with their own security concerns, access to a key information resource.

- You are allowing the release of hard business intelligence into unknown organisations, individuals and agencies

Your risk, your call, your surrender of control

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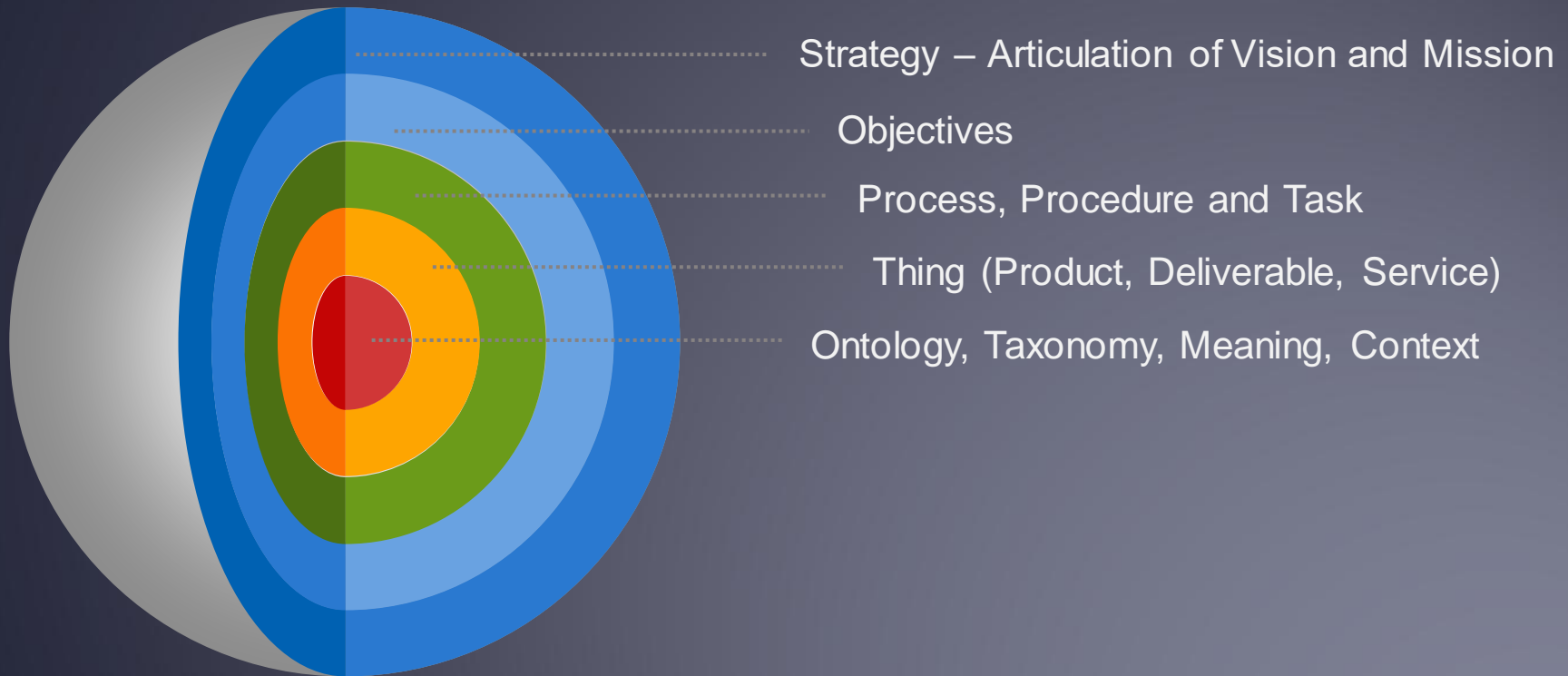
Documents Have A Life Of Their Own



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Your Documents Are Part Of A Layered Information Management Architecture

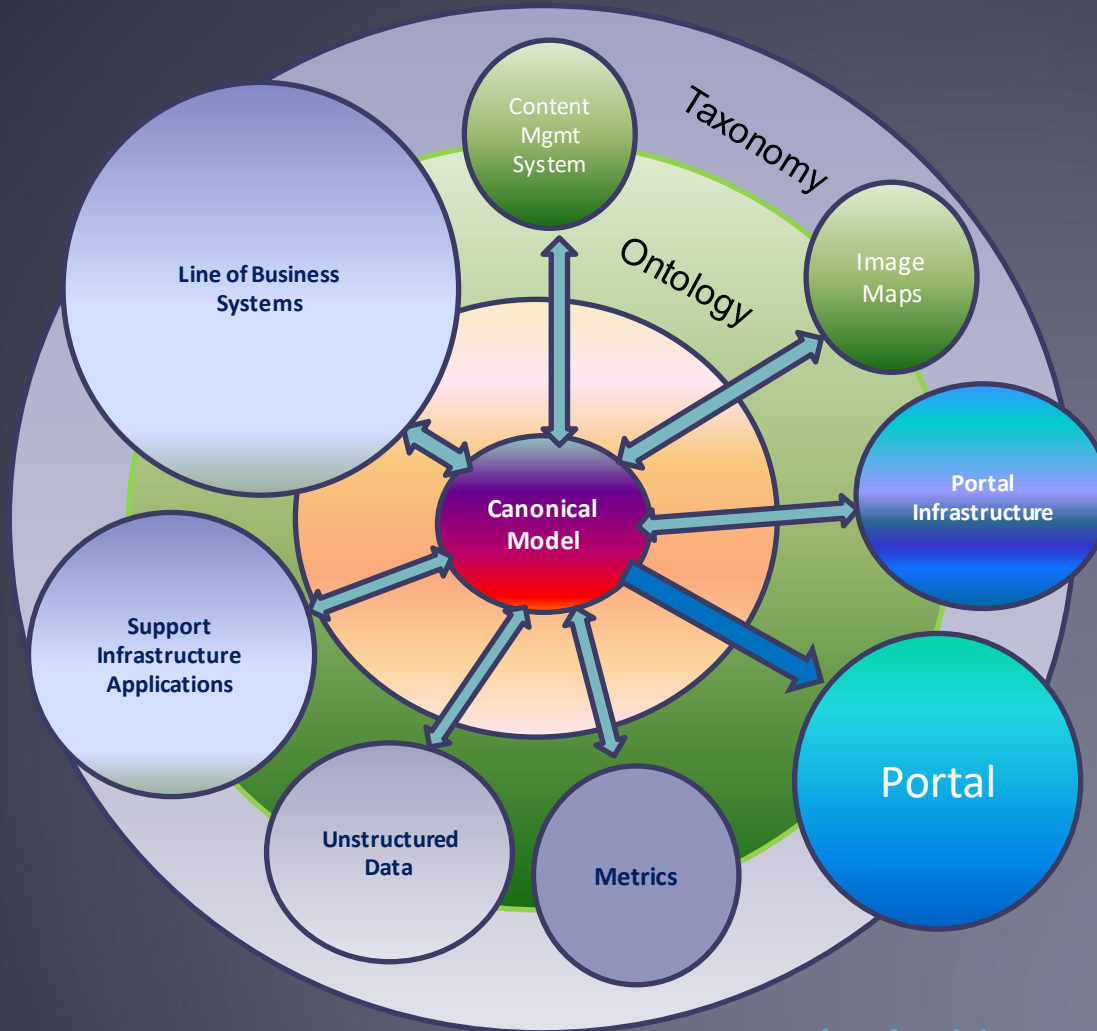


An architecture....

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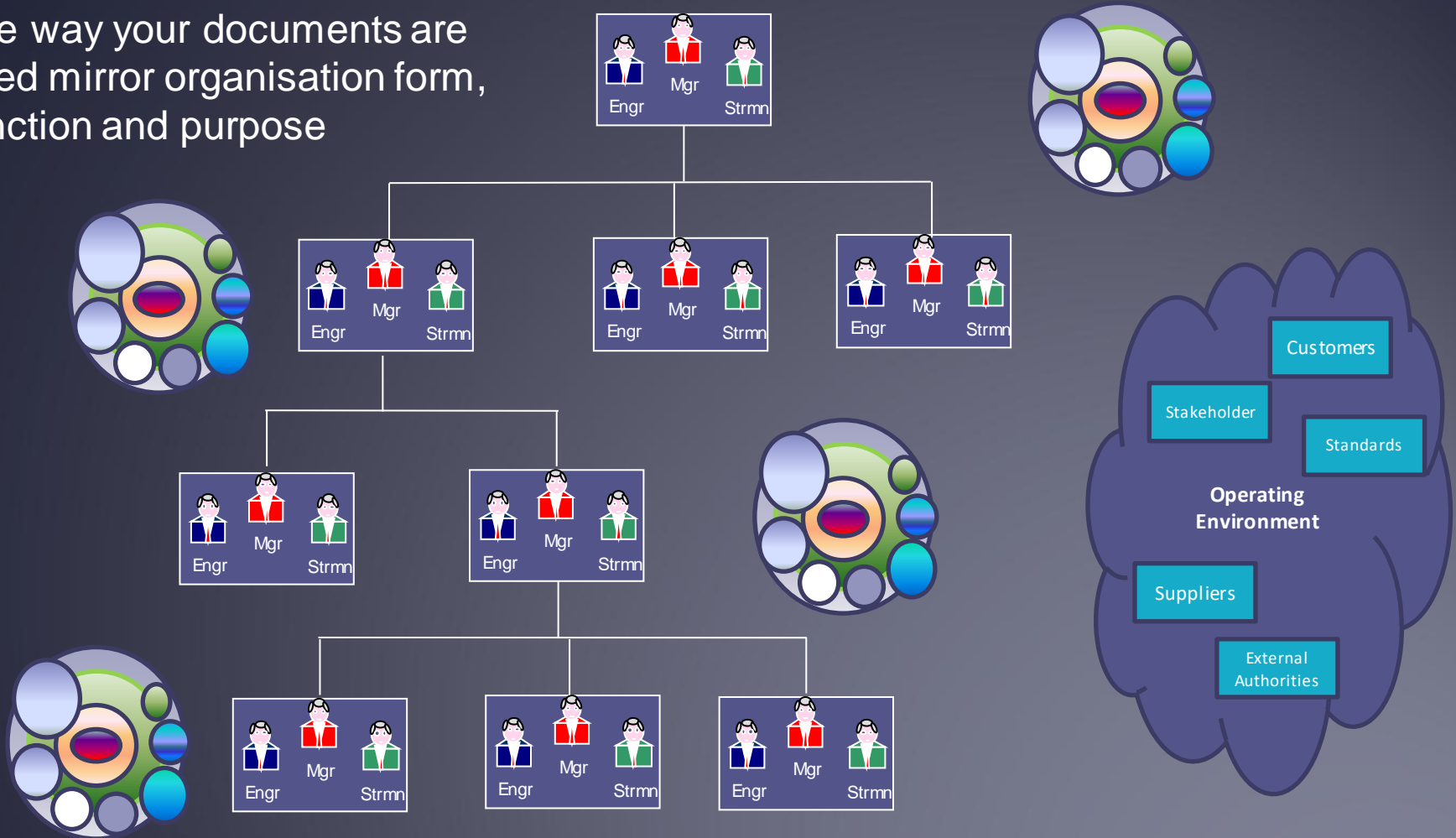
Conceptually.....



An Architecture...

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The way your documents are used mirror organisation form, function and purpose

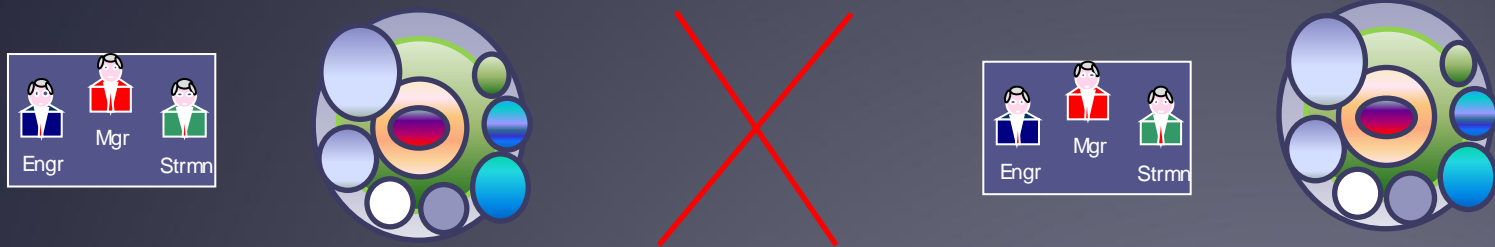


There will be more than one document store

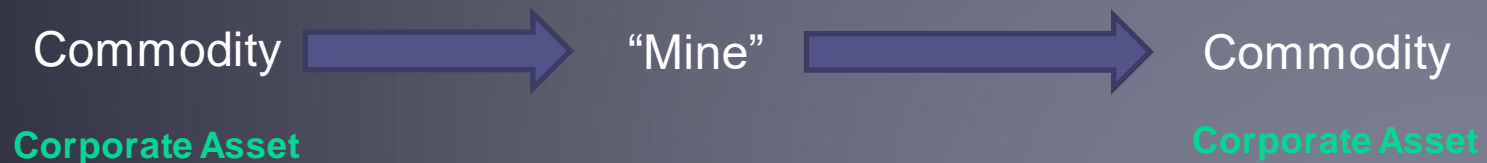
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Document Management is about Visibility and Accessibility

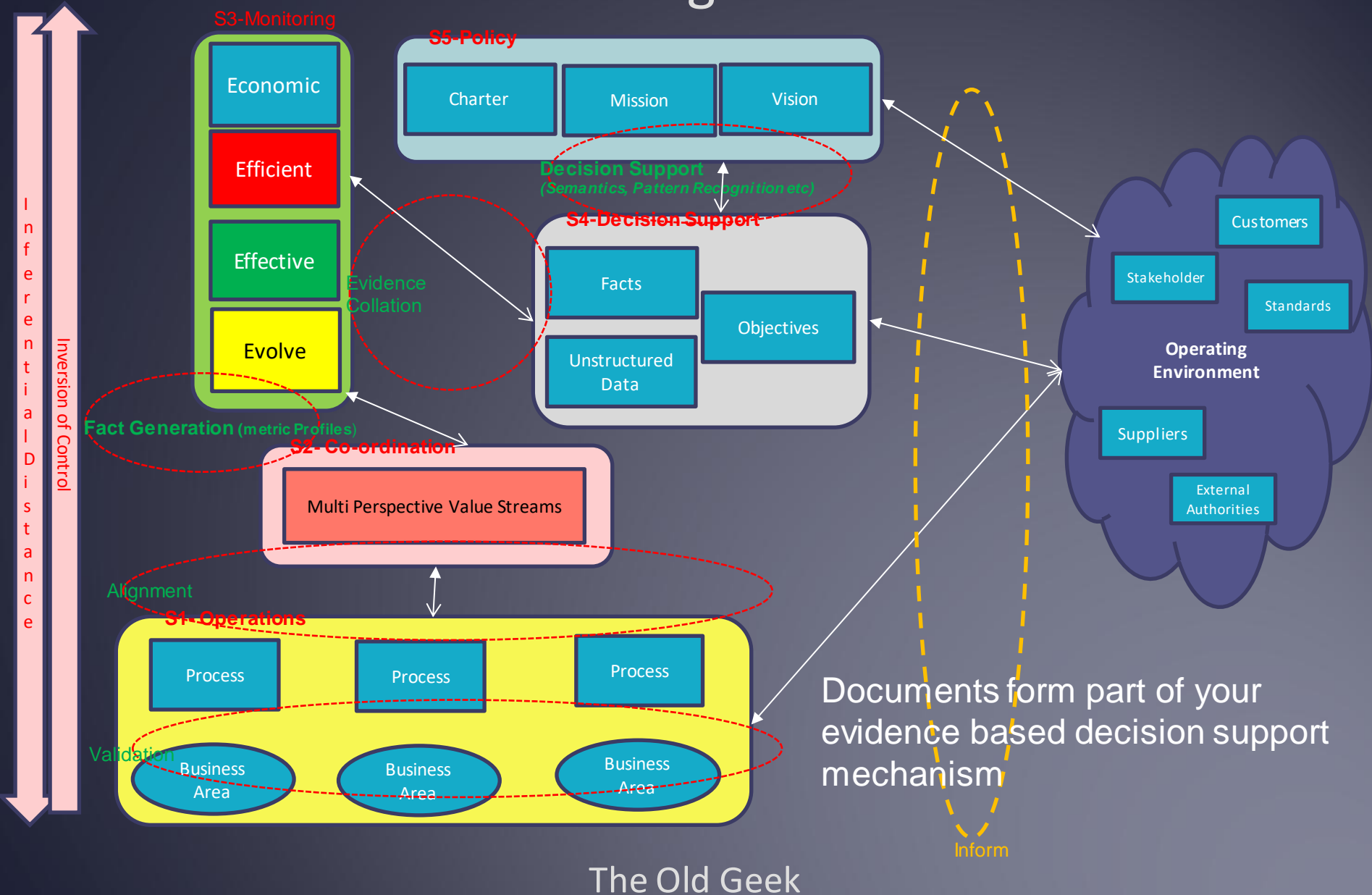


During their lives, There are multiple perceptions of ownership

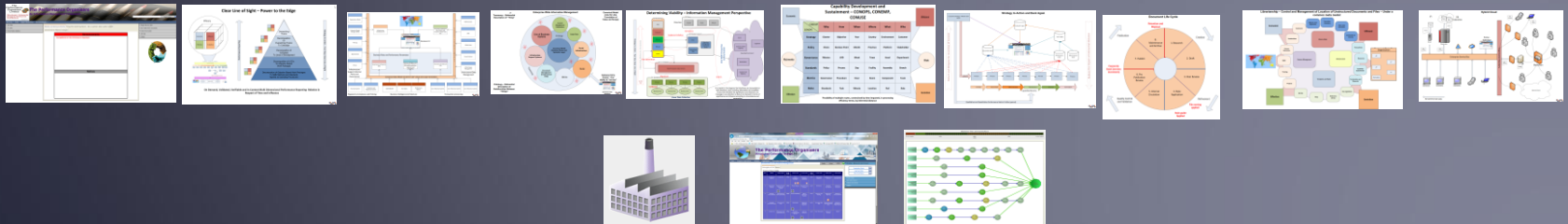
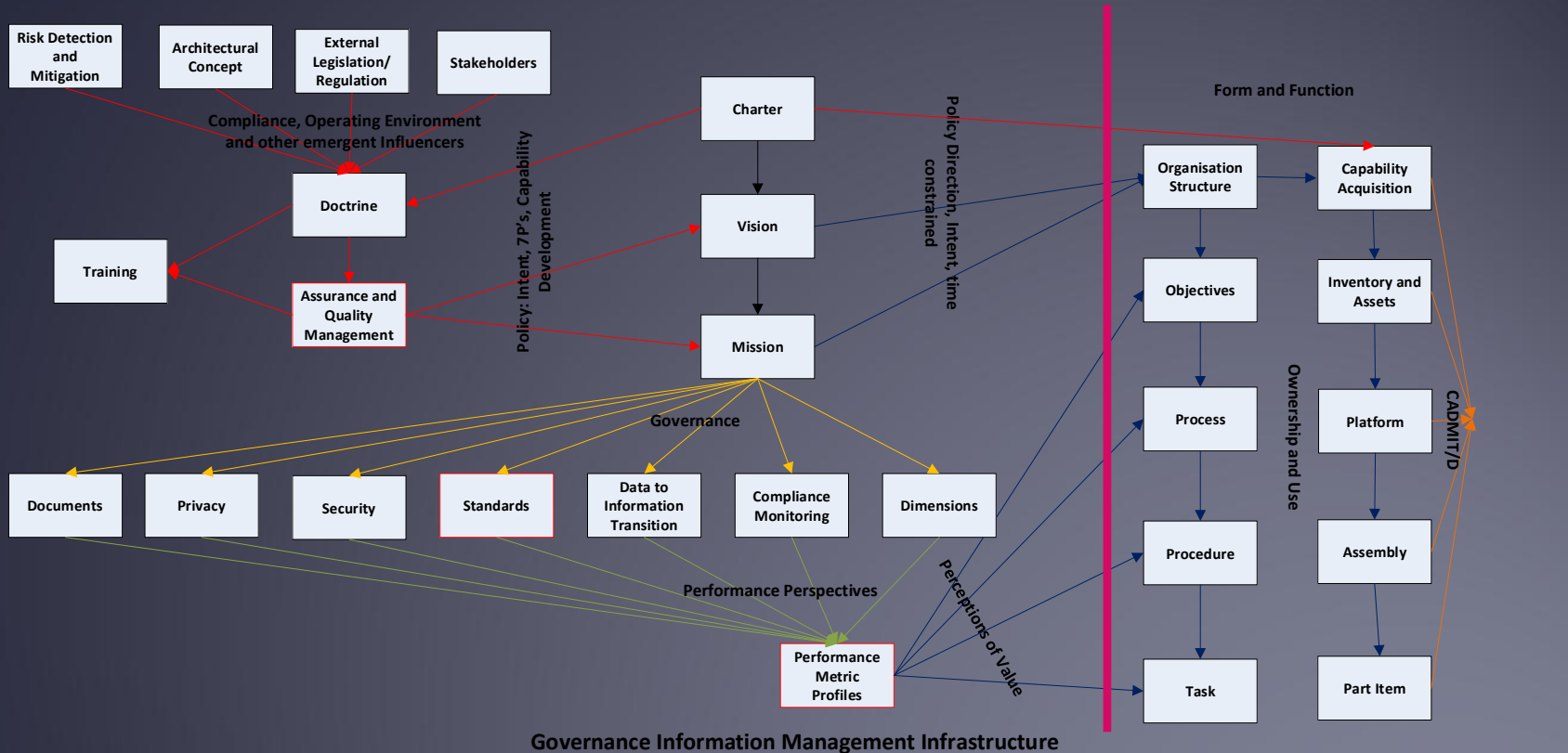


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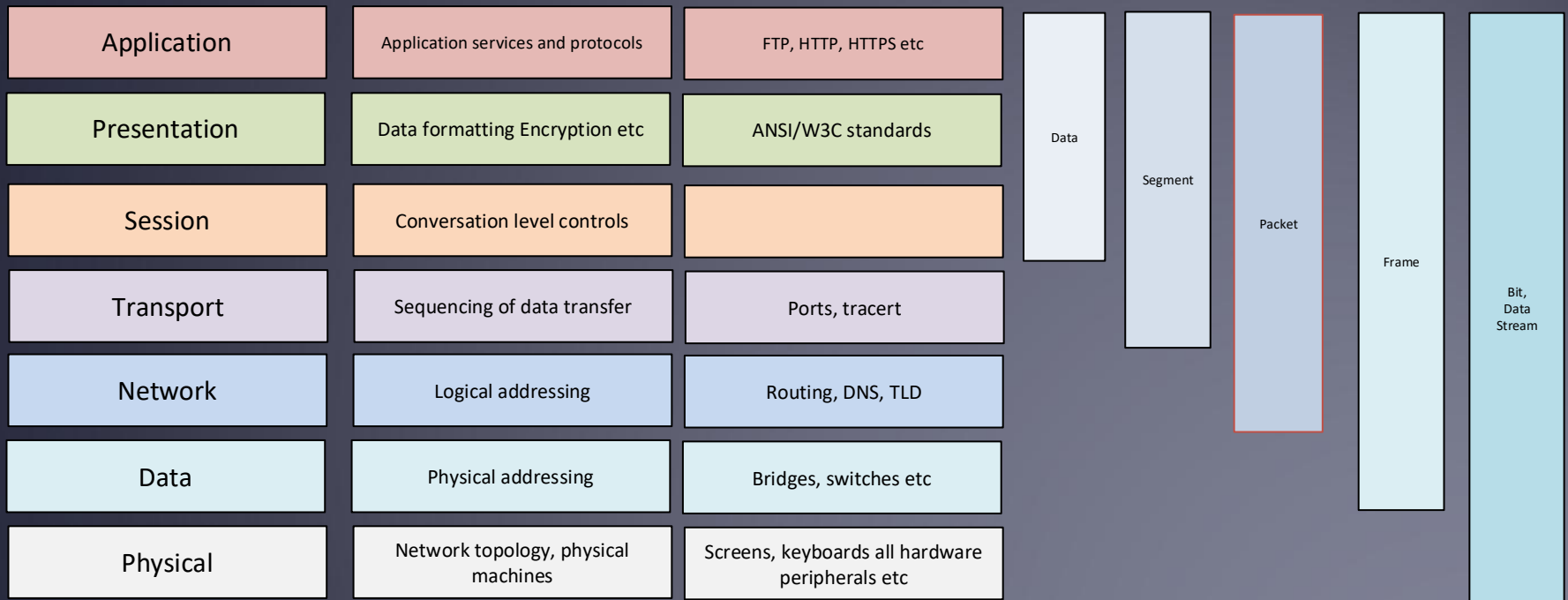
Policy and Governance.



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The “OSI 7 Layer Model”



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Your document management system **MUST** be capable of robustly supporting these architectural principles

Doing so is a matter of design.

A castle is only as strong as its weakest gateway, until your castle is secure, there is no ownership

Unless and until your organisation is managing location, there can be no control of ownership

If there is no control of ownership, there is no means of providing evidence based decision support

Until your organisation has the ability to support evidence based decision support, there is no means to determine viability

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Supporting Documents

[HSIS](#) Submission to the UK British Computer Society “Developer of the Year” awards 2010

Architectural [Schematics](#)

[Product Architecture](#) (including details of components, associated policy and governance, organisation mapping details and more)

Next slide deck will provide an overview of what a [Document Life Cycle](#) might look like

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That was the introduction.....

7P's... Proper Planning and Preparation Prevents P*** Poor Performance

It's a balance of risk

You don't need to think about it this way, but its recommended that you do.

Next slide deck will provide an overview of what a [Document Life Cycle](#) might look like

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

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