# Document management

[Document management](https://en.wikipedia.org/wiki/Document_management_system) means organizing and managing your documents and documents with other people. This also includes managing the permanent communication with other people if you’re working in a group (more about groupware later). However, that’s not all. Document management also includes identifying, classifying, storing, securing, retrieving, tracking and destroying or permanently preserving records1.

Document management stands very close to information technology because these technology nowadays can help out a lot if you want to organize all your projects. If you manage information analog, in other words: on paper, we speak about [records management](https://en.wikipedia.org/wiki/Records_management). One big advantage of saving documents digital is that these files do not take a lot of space on your computer. You do not need any analog folders which take up all the free space in the closet. Digital organisation is in most cases clearlier arranged than analog management because you have the ability to use folders in a more effective way than without technology. What do I mean with „more effective“? On computers, normaly you cannot see what is inside a folder (and in this spirit you do not have to worry about the hugh quantity which hides behind one folder).

However, we dove in the folder topic a little bit too far. Let’s talk about groupware:

# Groupware

Groupware is a software tool which supports the users in cooperating and communicating in a group. These software often features the ability to work in different locations at the same time (of course only if everybody has internet access…) having a shared goal. There are at least three levels of collaboration:

## Communicaton

If collaboration should work, everyone has to be able to communicate with every other person in this team via some kind of chat.

For example: E-Mail, faxing, voice mail, wikis or web publishing.

## Conferencing

Conferencing means the activity of talking to people in different places using phone or computer systems.

Tools: forums, phones, videoconferencing or application sharing via Dropbox.

## Coordination

Every team member needs to be coordinated between each other.

Tools: electronic calendars, project management systems or workflow systems.

--- *Groupware* ---

Groupware offers all these components to be able to be executed from everyone.

# DMS

DMS stands for document management system. However, these doesn’t mean only one specific thing or service. On the one hand, you can interpret DMS as a service which organizes documents for you. On the other hand, you could insist on saying that DMS is just the way which tells you how to organize documents. Both of these interpretations are useful if working in groups because either you use a program which automatically manages all your documents or you tell all group members how they should structure the folders and files in order to be consistent.

No mather how you would interpret DMS, DMS is very helpful for yourself and for your group in relation to consitently organizing and managing all your documents in an effective way. DMS in combination with groupware can be a hugh investment if you’re working in groups more often than you wish… 😊

## Functions of DMS

DMS lets you scan paper documents. In order to reconise your hand writing, DMS should be able to have these features:

* Image Recognition
* Optical Character Recognition (OCR), in order to read your hand writing
* Versioning: It lets you jump back to previous versions of your documents.

## Important Components

DMS has some important components such as versioning, which means that teammembers can retrieve previous versions of documents or other types of data. Another component is searching, because humans can work more effectively if finding files faster (because of concentration and so…).

Document management systems also need to be able to identify which user has access to different files and folders + storing data save and easy. Moreover, it is very useful if the program, which organizes your files is integrated very well with other services (🡪 in order to be able to open files directly into the right program). Sometimes it is necessary that files cannot be distributed. To do so, DMS needs to be able to save some files in formats which cannot be distributed from (f.e. PDF).

# CMS

Very similar to DMS but quiet not the same is CMS, the Content Management System. CMS is a service, which allows the users to publish, edit and modify content in files on a website. Some examples of CMS are:

* „Git“ – in relation with git is: GitHub, Bitbucket, GitLab, … (these services allow the members to work on one file simultaneously)
* Kontent.ai, Confluence, …
* Wikipedia

## Different CMSs

There are two different versions of CMS. Firstly, the web content management system, where you can create, manage and deploy content on web sites, like typo3 or wordpress. Secondly, there is the enterprise content management system, which allows you to organize your documents and contacts. Furthermore, it structures the enterprises’s information content and file formats.

# Document life cycle

The document life cycle is the way, the document has to go in it’s life. From creation, over improvements, digitalisation or archiving to deletion. This can happen analog, digital or in a mixed way from analog and digital. In most cases, analog documents are scanned and being saved on digital storage. If the content of this document changes, the process needs to be repeated again. In a document life cycle this happens very often.

The life cycle of documents consists of 6 phases:

## Creation / Generation

Every documents needs to be born. This happens by creating the document, analog or digital. However, arrival also counts as creation for a company, if the documents arrives within a mail. In the end of phase one, the document is being saved anywhere, where it an be found again.

## Edition / Making the content useable

While in the first phase only one person is necessary, the second phases involves a lot of people. Nowadays software allow to work on one document easily simultaneously. The edition of a document may happen more than one time. In many companies the documents gets edited by many departments. The usefulness of the document increases steadily. In the end, the document should be useful for other people.

## Disseminating

Everybody, who is allowed to use the document, gets access to it, and is sometimes also allowed to edit it. With nowadays technology sharing and editing is easier than ever before. Working with paper organized documents it is almost impossible to work as efficient and effective.

## Use

In the fourth phase, the document is used as active as possible. Documentations and other types of documents should be used regularly, depending on the demand of these documentation. Every employee in the company should have reading access to these documents, some people even write access. With the help of databases access permissions can be stored easily, nowadays.

## Archiving

After the document has been used by everyone and the usage decreases, the documents needs to be archived, which means, storing the document savely, where other archived documents are saved, and garentee that no more editing happens at this point.

## Deletion

If the document is out of date and does not contain the right information anymore, it has to be legally compliant deleted or destructed.