**Document Management**

**What is Document management?**

Document management refers to the process of **organizing, storing, and tracking electronic or paper documents**. This can include **creating, editing, reviewing, approving, and publishing** documents, as well as **controlling access** to them and **maintaining their security**.

Document management systems (DMS) are software programs that are used to automate and streamline these processes, making it easier for organizations to manage their documents and ensure that they are accurate, up-to-date, and easily accessible.

**What do you need for a functional DM:**

* **Easy document retrieval**: The system should allow users to find the documents quickly and easily they need, using search and indexing capabilities.
* **Document version control**: The system should keep track of different versions of a document and allow users to access previous versions if needed.
* **Secure access**: The system should include security measures to control access to documents and prevent unauthorized access or changes.
* **Collaboration tools**: The system should allow multiple users to work on the same document simultaneously, with the ability to track changes and resolve conflicts.
* **Auditing and reporting**: The system should provide an auditing trail of all document activity, including who accessed or modified a document, when and what changes were made.
* **Integration**: The system should integrate with other business software and tools, such as email, workflow systems, and content management systems.
* **Scalability**: The system should be able to handle a large volume of documents and users and be able to adapt to the growing needs of the organization.
* **Compliance:** The system should be able to comply with legal and regulatory requirements, such as data retention and e-discovery, and provide the needed reporting to meet those requirements.

**The functional requirements of a DMS:**

* **Document creation, editing, and annotation**: Users should be able to create, edit, and annotate documents within the DMS.
* **Document storage and retrieval**: The DMS should provide a central location for storing and retrieving documents, with the ability to search and filter documents based on various criteria such as keywords, date created, author, etc.
* **Version control**: The DMS should track and manage different versions of documents, with the ability to compare and restore previous versions.
* **Document workflow**: The DMS should allow users to create and manage document workflows, such as routing documents for review and approval, automating document-based business processes, etc.
* **Security and access control**: The DMS should provide a secure environment for storing and sharing documents, with the ability to control access to documents based on user roles and permissions.
* **Auditing and reporting**: The DMS should provide the ability to track and audit document activity, including who viewed or edited a document, when it was accessed, and what changes were made.
* **Integration**: The DMS should integrate with other systems and applications, such as email, CRM, and ERP.

**CMS vs DMS:**

A **Content Management System (CMS)** is a software application that allows users to manage and organize digital content, such as text, images, videos, and audio files. It is used to create and manage website content, and it typically includes features like editing tools, version control, and user management.

CMS is used for creating and **managing website content**, while DMS is used for storing, **managing and tracking electronic documents**. Both have version control, but DMS also have document retention policies and compliance.

**Assets**

Is Wikipedia a CMS or a DMS:

Wikipedia is a content management system (CMS) and not a document management system (DMS). A CMS is a software application that makes it possible to create, manage and publish digital content, such as websites, blogs or forums.

DM for a project:

To plan a DM system for a drone project using "Confluence" by Atlassian, you can follow these steps:

1. **Define the requirements and goals of the project** within a "Confluence" document and share it with all project stakeholders.
2. **Identify** all the necessary documents for the project and determine how they will be organized within the "Confluence" space.
3. **Select** "Confluence" as the DM system for the drone project, leveraging its cloud-based platform and features.
4. **Establish a structure for the DM system** in "Confluence" by creating folders or pages for different document categories, such as specifications, plans, reports, and documentation.
5. **Define access rights and permissions** within "Confluence" to ensure that only authorized individuals can view, edit, or delete specific documents.
6. **Regularly monitor and maintain** the DM system in "Confluence" to ensure proper organization, document integrity, and system functionality.
7. **Conduct periodic reviews** and evaluations of the DM system's structure and processes to optimize efficiency and effectiveness, making any necessary adjustments or improvements.