: What is the life cycle for a document?

by Dan Power

Editor, DSSResources.com

Documents should be handled once and if necessary scanned and digitized. Once a document is in digital format we can categorize, store, archive, transmit, share, annotate and perhaps revise it. Potentially these digital documents can provide decision support. Physical documents are obsolete and should be kept only when required or highly desired. Today we must manage an electronic document life cycle from birth to use to death. When first a document enters our information systems is its birth. Death only occurs when we choose to delete an instance of a document.

What is a document? Document when used as a noun is a generic term for a record in some format that captures one or more events and associated information about the event. A document may be a letter, a report, an HTML page, a work order or a record of a legal transaction. A document may be a scanned image of a printed document, an electronic document stored with markup or a photograph or video. There are a number of document types.

Document management is a process of applying and creating policies and rules associated with how documents are "created, persisted, and expired within an organization". The typical life cycle of a document begins with creation. A document may use a template and a specified formal structure or be more original and unique in its structure. Some documents are then stored while others must be approved or commented upon. Document creation maybe be ad hoc and unstructured or part of a workflow with defined steps of approval, elaboration and revision. Document filing and storage occurs as part of workflow or after the workflow is completed. Other steps that must be considered in the life cycle are 1) distribution to intended readers; 2) retrieval using search methods and metadata to find a document; 3) securing the document and procedures to insure the integrity of a document; and 4) retention and archiving of documents for an indefinite or set period of time.

Two cases at DSSResources.com explain examples of document-driven DSS. The case "University of Alberta increases timely access to policies and procedures" describes how the university's administrative policies and procedures were digitized and organized to support decision making. The Documentum case "Optimizing Aircraft Maintenance Operations using a Document-driven DSS" describes an innovative document-driven workflow that includes transaction processing and decision support.

According to Gartner Group, it is "estimated that 20% of an organization's 'knowledge' is contained in structured data and the remaining 80% is contained in textual information (i.e. documents)."

Managing the document life cycle is an increasingly important task and topic of discussion and research.

NOTE: This document may not be reproduced, transmitted, transcribed, translated or stored in a retrieval system.

References

Curry, B. and B. English, "Microsoft® Office SharePoint® Server 2007 Best Practices," Microsoft Press, 2011 at URL http://technet.microsoft.com/en-us/library/dd184062.aspx .

Documentum Staff, "Optimizing Aircraft Maintenance Operations using a Document-driven DSS", Documentum, Inc., 2001, posted at DSSResources.COM May 17, 2003, at URL http://dssresources.com/cases/bfgaerospace/goodrich.html .

Stellent Staff, "University of Alberta increases timely access to policies and procedures", posted at DSSResources.COM September 17, 2004, at URL http://dssresources.com/cases/ualberta/index.html .

Author: Daniel Power
Last update: 2012-03-04 06:03