365 ARCHITECHS

Document Management Systems

Document Management Systems

Document Management Systems (DMS) became crucial to effectively manage information within organisations.

A DMS stores, tracks and manages documents. It encompasses the entire document lifecycle within an organisation from the creation and publication of content, to archival and finally the retention or disposal of content.

In SharePoint the control of documents are managed via:

- Versioning, where only major versions are published to the audience while minor versions are visible only to the relevant information workers who are either in charge of and/or contributing to the final content, such as policies and procedures, organisational templates and forms.

- Auditing, who changed what and when.

- Checking in and out documents where documents are locked down for editing.

SharePoint allows for the implementation of policies for auditing to ensure that documents are protected; or correctly retained or destructed according to legal and/or corporate requirements.

SharePoint enables an organisation to have a very tightly or a loosely controlled document management solution depending on the culture, size and the needs of the entity.

Features	Comparison	
	SharePoint DMS	Other Cloud Document Storage
Document and file storage	✔	✔
Access anywhere, anytime	✔	✔
Offline access	✔	✔
Ability to share documents	✔	✔
App access on mobile devices	✔	✔
Co-authoring	✔	
Global real time collaboration	✔	
Automated document version control	✔	
Ability to lock documents Check-in/Check-out feature	✔	
Customisable views and filters	✔	
Item level permissions	✔	
Use of tagging/metadata	✔	
Document Sets (storage area with inherited attributes/tags)	✔	
Business Process Automation via workflows	✔	
FAST search to easily locate documents	✔	

Components of a DMS

Information Architecture
- The design and deployment of a robust, scalable structure for all content

Document Sets
- SharePoint's way of organising documents into sets with common attributes to the set of documents or work output and provides a user interface to help organise and manage documents

Metadata
- Data stored about information or documents to enable ease of search

Managed metadata
- A document classification system based on terms and term sets managed in a central location, the term store. It assists in consistent use of terms therefore supporting more accurate search results

Knowledge Base
- Organisation wide knowledge can be transferred and stored in both unstructured wiki pages and structure enterprise wiki sites

Record Centre
- SharePoint's Content Management and Records Management system is an enterprise scale solution. Records Management can be described as the practice of identification, classification, archival, retention and finally destructions of documents via controlled retention policies

Integration with enterprise social

yammer

Yammer enables employees to collaborate easily resulting in faster decision making via self-organised teams

Skype for business

Lync soon to be Skype for Business is a real time communication platform that allows for instant messaging, VOIP and presence with full audio, video and web conferencing capability

OneDrive for business

OneDrive for business is a central location to securely store and share documents and synchronise files across devices for use online or offline.

Planning an effective DMS

The elements to establish an effective Document Management Solution for an organisation consist of **identifying**:

- Each **type of document** created by the organisation
- **Templates** that are used for each type of document
- **Storage** location for each stage of the document's life cycle (Informatin Management Policy)
- **Metadata** for each document type
- **Movement** of documents as team members contribute (plan the flow of content (review, approval) and governance)