

Virtual Filing – Familiar, yet unfamiliar

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It goes without saying that the personal computer has revolutionized the way in which we work. This has made many of the routine tasks we undertake easier, while at the same time complicating many other tasks, so it seems. In fact, many of these tasks remain fundamentally the same.

The filing and retrieval of business information has always been problematic. Some people file absolutely everything, some nothing at all. If everyone in an organization were to file everything, regardless of media type the business will rapidly run out of storage space both physically and electronically – if no-one files anything – the organization will find that it doesn't have all the information it needs to do business. The information that gets filed may not be filed in a place that is obvious to anyone other than the person doing the filing. This leads to the common complaint "I know it's in the files – but I can't find it!" Misfiled information may as well be lost. Further complicating the matter, many filing systems grew out of individual style or preference without any thought given to its business use.

When the idea of using the information technology infrastructure to manage the ever increasing mass of files most organizations turned to using a primitive database to record the names of the files, the locations where the files were held, and occasionally the documents held within the files. This made the tasks of the records management staff a little easier, a simple dataset query could tell you instantly who had ordered a set of files, as well as whether or not they had been returned.

The expanding capabilities of IT infrastructure lead some to think about keeping the files "electronically" rather than having archive boxes full of manila folders with printed document stored in the manila folders, it would all be "virtual". Oddly in many places this was implemented by scanning the documents already on a file and then creating an electronic file with the scanned images – this led indirectly to the bizarre outcome of people printing out an electronic mail message so that it can be scanned and stored in the electronic file system. This process was time consuming, and could only be done by people who had access to certain facilities – such as a scanner. This meant creation of these kinds of "electronic files" was still done by the records management area.

At the same time as this development was occurring other organizations were developing systems where the documents were stored in their native formats on a network drive or in a document repository to facilitate a group working on shared documents. As revolutionary as this may seem there are inherent limitations and problems associated with this methodology.

Consider the following analogy: if asked to locate the Smiths in your local telephone directory, you could do so quickly and effortlessly. Asked again to identify the Smiths that are related to one another, you could not. This is because the telephone directory, much like a database, holds only specific attributes about each individual such as name, address, and telephone number. This restriction of pertinent metadata makes it impossible to insure a reliable and authentic search. The omission of the associated business constructs makes it virtually impossible to manage the documents.

The needs of the two approaches to electronic document handling were quite different. People who are sharing documents in a collaborative environment need them stored in their native formats; they need to be able to edit them and change



them easily. People who are storing documents purely as a record of who said what to whom and when, specifically do not want the documents changed or altered. But this has always been the case – even when all work was created on paper and stored in paper files. However because the two groups had different needs it led to a belief that electronic files need to be managed differently and in a different system to the paper files. In fact the opposite is true, electronic files and documents can, and should be managed and maintained in precisely the same way as paper file, and ideally in precisely the same system.

A good electronic records management system should empower its users to fully exploit and secure their vital business information assets, regardless of media type or format. This means that the users should be able to find relevant information efficiently, improve the accuracy of information on which business decisions are made and thereby realize improved productivity through the efficient reuse of information. An electronic records management system should allow the organization to effectively manage all of their business information by permitting the application of business rules and information management constructs to ensure the efficient capture, reuse, storage, retrieval, navigation, and disposal of vital corporate information assets. If the electronic and physical information are managed in separate systems, the process of, for example, legal discovery becomes nightmarish.

Putting information into a folder is not new. Folders hold the business rules beyond that of the document. A virtual or electronic folder maintains the same characteristics. Associated with any folder are the relationships and the business constructs; this includes the corporate rules, standardization of terminology and who can see what, retention etc. which is then inherited by the documents. In so doing the organization can easily and effectively maintain and manage corporate information over its lifecycle. This then is the virtual file.

For any information to be useful it needs to be findable, it needs to be stored in a way that people can access it in a timely fashion, they need to be able to trust it, and they need to know how to use it. This is true whether the information is stored in the ones and zeros of an electronic file, or in a vellum manuscript. It's filing – it's nothing new, it's nothing groundbreaking, it's certainly nothing that needs a different solution for every different media or format in which the information is stored. This is the true advantage of the electronic virtual file.

About TOWER Software

TOWER Software delivers Electronic Document and Records Management (EDRM) Solutions, empowering organizations to take control of their corporate information assets. TOWER Software's award-winning TRIM Context® solution is a single, integrated platform that manages business information throughout its complete lifecycle. By relying on its proven domain expertise, strong strategic partnerships, and powerful solutions, TOWER Software enables organizations to maintain accuracy, maximize efficiency, and achieve and maintain standards compliance across industries, resulting in sustained competitive advantage. TOWER Software is a privately held company with operations in North America, Europe and Asia-Pacific. For more information, visit www.towersoft.com.



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