

The Value of Using Knowledge

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To an organization, data, which includes content and metadata (attributes) represents history, precedent, decisions, results and future planning. The capability to build relationships between data represents information. How information is related to other information represents information in context, the accrual of knowledge.

How information is created and utilized is often an integral function of staff's day to day activities. These activities are often defined by prescribed business processes and represent the use of knowledge.

In this ever increasing competitive world, business processes not only need to be defined but included within applications to assist in the timely and responsive completion of our day to day responsibilities.

The combination and the management of information and business processes ensure that information is understood and knowledge accrued utilized. This results in better decision making throughout an organization.

TRIM Context® is well known for its capacity to manage information. The value adds for organizations are the ability to enhance business processes through the capability to assign email, sequential tracking and/or business workflows to registered information.

Email is a common desktop application which is used to route information or requests for information. TRIM Context provides the capability to not only capture and manage actual emails but also assist the business process by:

- Requesting further information and attaching references to TRIM Context Objects
- Automatically forward email notifications of actions to be undertaken with regard to TRIM Context information
- Automatically forward email notifications for business rule breaches in the day to day management of registered information
- Provide business process notifications

A number of business processes are sequential in nature. In most organizations there are a number of processes that will require the input of a number of people or the approval of different steps; for example processing a Freedom of Information request or the development of a new policy paper. TRIM Context allows a user to establish a process and assign responsibilities and timeframes. Management has the capacity to monitor the process and provide statistical reports. An example of such a process is shown below.

Organizations are also required to gather information from a number of people simultaneously. The need to develop a business process that tracks and monitors the process to ensure completion is more essential than ever before. The capability to get to market quickly is often the difference between



mediocrity and excellence. TRIM Context allows organizations to set up complex business processes and include the following functionality,

- Branching
- Collaboration
- Escalation
- Looping
- Decision making
- Document generation
- Document reference

TRIM Context allows staff to use these attributes to complete their day to day activities. In addition the use of metadata assigned to documents/folders/information provides a complete picture of information to staff and the organization.

Why?

The answer is in two parts, organizational and for the staff.

The organization is concerned with its competitiveness. Conducting business is based on making decisions everyday. Information is what organizations base sound decisions on. Without correct and accurate business information the chances for errors or poor decisions increases. Without the recording and tracking of business decisions the chances of litigation, poor performance and/or negative growth increase.

Metadata provides organizations the capability to achieve the following:

- Creation of relationships between information
- Standardization of terminology, Organizations tend to be long term, staff are more mobile
- Use of organization specific terminology
- Maintenance of information for appropriate time periods in both active and inactive storage facilities
- Implementation of corporate and business rules (eg classifications and retention guidelines)
- Reduction of time searching for information because search parameters can be refined, saved for future use and combined with document content searches. This reduces the search results.

Staff want to use applications that are simple and not too far removed from their day to day activities. With this in mind each organization needs to develop appropriate policy and procedures, and education when implementing any system to ensure compliance with organizational requirements.

Metadata provides staff following benefits:

- Less time searching for information
- Standardized terminology
- Information kept in its context including relationships with other information

- The ability to add abstracts/notes
- The capability to reuse common search parameters
- Assign business processes to activities and documents

For the organization the following benefits accrue:

- Improved response times
- Quicker time to market
- Compliance with statutory, legislative, legal, quality and audit requirements eg Sarbanes Oxley Act, (USA 2002), FOI Act
- Better decision making

In addition to using metadata for searching purposes most staff will also search by document content. This is primarily because staff will tend to recall what the content of a document is rather than the title. Certainly in an organization that has a low number of documents that are content indexed this is quick and convenient. However where document holdings are large one could compare document content searching with searching the web, with regard to the number of search results that are returned. Relevance ranking is of assistance only if the staff member can define what the relevancy parameter is.

More useful to the staff is the capability to combine a document content search with a metadata search allowing the staff member to clearly define their search.

Experience in the field suggests that most users will search by the following methods:

- By title (metadata)
- By date created (metadata)
- By record number (metadata)
- Document Content

For most users Document Content searching is used as an adjunct to their other searching, rather than as their primary search method.

Structured metadata gathering not only has tangible benefits to the organization as discussed, but also ensures the usefulness of metadata searches to the staff, by maximizing the accuracy of the returned results. Good metadata transforms information into knowledge.

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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