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Techwriting documents



Managing shared folders

Techwriting documentation – Shared Folders

TECHWRITING LIMITED

Techwriting provides technical authoring services specializing in Disaster Recovery, Operating documentation, IT service management documentation, ITIL and ISO 27001 and document management processes using a document management system such as SharePoint.

We also provide Process Analysis and Process writing services. Techwriting has been in existence since 2007 and I personally have over 20 years' experience working as a Technical Author. I write a blog which can be read on www.techwriting.co.uk

Techwriting Blogs focus on issues facing technical writers with the aim of providing advice to technical writers who have an interest on how other technical authors approach their jobs. If you are either considering using a Technical Author to help manage your documentation or have never heard of a technical author before but you are certain I can help please call. My advice is always free, but my services are not. The information in this document remains the property of Techwriting Limited.

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FOREWORD

A Shared directory referred to as a share or network drive, is a directory or folder that is made accessible to multiple users or groups on a network. The share drive is the most common method of accessing and sharing information between users on a local network. How can you manage your shared drive to keep it working for you and your company? Without proper control the shared drive will become cluttered with so many documents that users now and in the future will struggle to find the correct documents.

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INTRODUCTION

This document looks at the Shared Drive and the expectation surrounding the use and management against the longer-term goal of installing a Document Management System (DMS).

WHAT IS A SHARED NETWORK DRIVE?

A shared network drive provides electronic storage space for authorised users.

USING A MANAGED SHARED DRIVE

Ideally, if your Shared Drive is set up correctly you would note the following benefits:

- Staff members know where and how to access information
- It provides a central space for storing information in electronic format for the work area
- Reduces duplication by having one central storage space for your work area
- Information is not lost when staff members leave the work area
- Electronic information relating to the one subject is kept together
- Supports management of versions, drafts and working documents
- A controlled hierarchy of electronic folders and document titles makes it easier to retrieve information

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WHAT ARE THE INEFFICIENCIES OF USING A SHARED DRIVE?

A Shared Drive works well when there are a few users. However, as the folders and documentation grows it will quickly become cumbersome and inefficient?

OPERATIONAL INEFFICIENCY

The folder structure contains too many levels meaning documents are difficult to locate and users waste time searching for specific documents

- Searching for documents using an unspecified 'Title' or 'Subject' will raise numerous unrelated results
- More than one person can open a specific document at the same time leading to a lack of content integrity

OPERATIONAL RISK

- Folders contain a mixture of Draft and Published versions making it impossible to determine which is the latest version
- There are information gaps as users retain copies of documentation locally and not on the shared drive
- There is no formal ownership of the documents
- Without a policy of naming documents, the title and subject of the document may not accurately reflect the content
- If Document versioning is not used or visible no-one knows which is the latest version

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- If there is no policy regarding the deletion or archiving of draft documents the Shared Drive will eventually become overcrowded.
- If the Shared Drive is not backed up on a regular basis the documents could be lost if there is a network failure

COMPLIANCE RISK

- Some documentation may contain sensitive information, which anyone can access therefore placing information and data at risk.
- Audits, which require sight of the documentation, are hampered by the lack of structure and inability to locate the correct documentation. If the organisation is required to comply with rules surrounding documentation, this will prove to be a failure.
- All staff should be careful not to store personal information or any information relating to anyone within the organisation.

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ORGANISING YOUR SHARED DRIVE?

What does an organisation need to do to ensure that using a Shared Drive remains useable and manageable?

FOLDER POLICIES

Creating a policy and written process around the management of the folders will help manage the Shared Drive:

1. Folder Titles

Following these general principles when titling electronic folders:

2. Place a limit on who can create a folder(s).

By allowing anyone to simply add a folder means that there will be a growth in folders with personal titles (marks stuff, My stuff, etc), into which users will place their own documentation when it should be placed within a correctly titled folder

3. The Title should describe the Content of the Folder

To make it easy to locate the documents and help users readily identify the correct folder:

- The title should accurately reflect the content of the folder to which new records should be added.
- The title should differentiate the folder from all others on related matters
- If the subject, content or function of the folder changes, either rename it or close it and create a new folder

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- Create several folders (subfolders) relating to specific matters rather than one relating to a broad area.

4. Retrieval and navigation

Do not allow the folder structure to become too complex (too many folders within folders) as this makes navigation harder. It is easier to maintain a flat folder structure and store documents by subject or by type.

5. Try to keep names simple and limit the number of levels within a hierarchy.

Note: To access frequently used folders and documents create short cuts

DOCUMENT POLICIES

1. Use Standard Terminology

Decide on standard terminology and the format of the document titles, and apply consistently. Avoid technical jargon, which may change over time to ensure future identification and easy retrieval.

2. Document Naming conventions

Document Naming conventions ensure the titling of documents is done in a consistent and logical way. This ensures that the correct documents can be located, identified and retrieved from a filing system

- Identify documents by the use of a Document Subject and a Document Title.
 - If the subject of the document is ‘Service Management’, the title ‘Change Management Procedures’ will identify to which element of service management the document belongs.

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Note: It is good practice to use MS Words custom document properties to record the title and subject. When searching a Shared Drive for a document the properties will help identify the documents quicker and smarter.

3. To ensure consistency:

When you perform a Save As . . . for consistency stick to lower case letters and separate each word with an underscore. Word recognizes the underscore as a word separator, which helps when a search uses more than one word.

Example:

sm_change_management_process.doc /

sm_incident_management_process.doc

Consider using a prefix to identify the documents and its contents.

Prefix	Identification	Example
Sm	Service management	sm_change_management.doc
Inf	Infrastructure	Inf_document_title.doc
Ops	Operations	Ops_document_title.doc
Ug	User Guide	Ug_document_title.doc
Dev	Development	Dev_document_title.doc

VERSIONING

To keep a track of the documentation a system of versioning will help users identify which document is current.

Note: The document version needs to be displayed in a prominent place on the front page of the document and / or in the footer.

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4. There are three methods to version the document

- Use the custom MS Word document properties and set up a 'Field' using Quick Parts
- Manually increment the version number on the front page or footer
- Save the document version in the title using the Save As ...
xx_document_title_v_0.1.doc

RULES FOR VERSIONING

- All documents start at: 0.1 and increment the number at each change.
/0.2 / 0.3
- A published/signed off document should be V 1.0. / 2.0 / 3.0
- When the document lifecycle begins version the document v1.1

DISPOSING OF DOCUMENTS AND RECORDS

Many “owners’ of documentation fail to delete old documents as they believe they may serve some future purpose. Therefore, it becomes necessary to perform a regular review of the documents stored in the shared drive to maintain the efficiency and effectiveness of the filing structure.

Delete the following:

- minor copies/ drafts of documents
- unnecessary duplicates of any documentation
- Work in Progress copies, which are no longer required
- Documents, which have no operational value

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ACCESS AND SECURITY

Some documents might require security provisions:

- Identify documents that require access restrictions
- To protect documents from accidental alterations make them “read only”
- Documents that are used and read by certain groups can be password protected.

DOCUMENT HISTORY

Maintain a document history by listing every change made within the document and who made the change. This will keep the integrity of the document intact as any changes can be traced back to the person who made them.

PEER REVIEWS

It is essential that all documentation be reviewed by SMEs for accuracy and changes to the content and /or graphics.

THE ESSENTIALS OF DOCUMENT MANAGEMENT

DOCUMENT CAPTURE

The ability to effectively capture electronic and paper documents of different formats in a central repository. Capturing documents, is not only about storing information in an organised manner, but also the ability to easily retrieve relevant document information, and archive historical data.

VERSION CONTROL

To provide different levels of security, such as read and write access to ensure the integrity of the data that resides in the stored documents. Within a Document Management system, a Check in and Check out facility would be configured

WORKFLOWS

To design and apply configurable workflows that map to the business processes and approval workflow of documents in your organisations.

REPORTING AND ANALYSIS

It is important to be able to exchange information between documents, as well as consolidate data in multiple documents for reporting and analysis purposes to provide better visibility across your organisation.

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COLLABORATION

Share documents among relevant stakeholders, as well as restrict the documents to those who should have access.

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Appendix A. Glossary

Document	Discrete, individual item of written information in any form (paper or electronic), which constitute the smallest unit of filing. This includes traditional paper letters, memos and reports as well as electronic formats such as word processing documents, spreadsheets, emails and databases. Documents become records when they meet the definition of “record” below.
Record	Information “created, received and maintained as evidence and information by an organisation or person, in pursuance of legal obligations or in the transaction of business.”
Filing System	A system of organising, storing and identifying documents and records to enable their retrieval, use, and disposition. Can be either paper or electronic.
Filing	The physical process of placing documents and records in the appropriate location and order within a filing system.
File	A set of related documents and records (regardless of format) organised and kept together
Electronic Folder	An area on the computer where electronic documents can be filed and organised, within the Windows operating system environment.
Shared Network Drive	Electronic storage location on network accessible to a defined group of users.

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