Objectives: Information management is critical to ongoing successful development in technically-oriented companies. This section will examine information and documentation management. By the end of this lesson, you should have a sound understanding of:

- principles for information/documentation management; and
- management tools for information or documentation management.
What to do with all your information?

Imagine that you are working on a large project that incorporates three specific teams working on different areas of the same piece of software. One team is functional, one development, and one team is training. Each team, while working on specific areas, is dependent on the other for information.

How can this information be shared within an organisational environment?

How do you store or retain your institutional knowledge so that ten years down the track, employees are able to access the research you did today that solved a problem that may appear in the future? These questions are fundamental to understanding knowledge and information management.

The knowledge management industry is a field in itself, and will not be covered in depth in this course. However, the concepts upon which knowledge management are based are important for us as technical communicators to understand.

What is knowledge management?

In an organisational context, knowledge management is commonly thought of as the use of information technologies (software, hardware, systems) to organise and disseminate knowledge and information. However, it is more than that.

Tiwana (2001) defines knowledge management as the “management of business, customer, and process knowledge and its application for adding value and competitively differentiating product and service offerings” (p.5). He argues that knowledge management is integrally linked to customer relationship management, which is “the process of managing relationships with existing customers to maximise their loyalty, increase revenues from them, and retain them while selectively attracting new customers” (p.6).

One of the most significant points Tiwana makes is that for a company to remain competitive, “they must effectively and efficiently create, locate, capture, and share their organisation’s knowledge, and most importantly, rapidly bring it to bear on problems and emergent opportunities” (p.7).

It is important, therefore, to realise that while technology is integral to managing information in most organisations, the principles revolve around retention and distribution of information to add value to business. This is applicable to every organisation, be it a small business with two people and no technology, to a multinational corporation.

For example, Susie and Doug run a garden services business. Doug regularly trims Roger’s lawn, and Roger pays him cash on the day. The only record of this is in Doug’s diary. Doug goes away on holiday, and asks Susie to do Roger’s lawn. Roger is not there, and Susie mows the lawn. When Doug contacts Roger later to ask for payment, he finds Roger upset that Susie entered his property while he was not there. Roger is no longer happy with their service and terminates his business.

This is a very basic example, and highlights a breakdown in communication when
only two people are involved. It does, however, illustrate the need to perhaps have central management of information. Even a very basic card system, which has specific notes about regular clients, could have prevented this from happening.

Methods of information storage and document management

Information should be formally documented before it can be stored. This can be through (as a minimum):

- meeting minutes
- reports
- issue papers
- design drawings
- test scripts and results
- e-mail/discussion board
- patents
- faxes

Documenting processes plays an extremely important part of any development environment. You simply cannot rely on memory alone to remember all of the issues that you had when developing new equipment or technology. Your organisation will ultimately be more proactive and able to employ resources more efficiently if you are working with formal methods of documentation. A standardised documentation environment will:

1) store all development and management documentation in a central area;
2) establish procedures for adding to original documentation that is understood by all parties, including management and marketing staff;
3) reduce the habit of ‘reinventing the wheel’.

In some cases, your organisation may require a formalised means of document control. This ensures that intended recipients receive documents by a specified time, and an audit trail is created. Recipients sign for documents, and dates are recorded. Responsibility for managing the progress and tracking of documents may lie with managers, or a document controller may be an established position within the company (Burke, 1992). This is also an effective means of managing documents which require significant change, as changes are recorded, dated, and signed before the document is stored (electronically or physically). Document control techniques can be implemented in both print and computer-based environments.

If you were to leave your job this afternoon, what would you need to tell someone to ensure a smooth transition? What would happen if the person taking over your job was to be located elsewhere, and you could not meet to handover? It is these considerations that lie at the heart of managing information.
Using technology to manage information

Information can be managed in a multitude of ways, and the specifics will largely depend on the type of industry in which you work. There is little doubt, however, that using technology is beneficial when storing and retrieving information. Information that comprises any knowledge management system may include processes, procedures, patents, reference works, formulas, ‘best practices’, forecasts and fixes.

Intranets, groupware, data warehouses, networks, bulletin boards, and tele/videoconferencing are some key tools for storing and distributing organisational knowledge.

Intranets, coupled with other database and document management technologies (e.g., IBM Knowledge X, Lotus Notes, and Microsoft Office Tools & Servers) provide powerful systems to generate, share, and diffuse knowledge across a global network. An intranet is a shared information workspace where staff from throughout the company, regardless of geographic location, can communicate, work collaboratively, and share content information. (Persaud et al, 2001, p.13).

Some large organisations have created specific software repositories to manage knowledge: Accenture’s Knowledge Xchange, Booz Allen & Hamilton’s Knowledge On-Line, CAP Gemini’s Knowledge Galaxy, Ernst & Young’s Center for Business Knowledge and Monsanto’s Knowledge Management Architecture.

Ideally, as a young graduate, you will move into an environment where some form of document or information management exists. If not, you need to ask a few questions when you are working on solving a problem:

- has this happened before?
- could this happen again?
- could this be part of a bigger picture?
- could someone need to refer to this again in the future?

If the answer is yes or maybe, you need to consider document or information management from the outset. It will save time and money in the long run, as well as making your life easier and increasing your contribution to the organisation.
REFERENCES


You are working for a small software company that employs 15 staff in the following areas:

- 4 sales people
- 1 receptionist
- 1 finance officer
- 2 client services officers
- 4 developers
- 3 graphic artist/publications

The problem: Client services and sales people are receiving a number of customer complaints about the software. How do you ensure that this information is passed on to the developers so that changes can be made? Once the changes are made, how do these updates then get incorporated into publications (manuals), and how are the sales people informed of any changes of updates?

Write a brief information management plan that would help manage the information in this scenario. Your response should be no more than one page, and may include diagrams.

Internal students should submit this exercise to their tutor in class. External students should submit this with Assignment 2 in Week 12.

*Note that at this stage, punctuation and grammar is increasingly important, and your submissions will be failed/discounted if they do not meet basic grammatical standards. If you are having problems, you should contact your tutor (internal students) or the Course Coordinator (external students).*