Chapter 3

Characteristics of Enterprise Document Environments

OVERVIEW

We now review how business and government enterprises that have yet to embark upon IDCM may be managing processing of different document types. We provide a generic description of each type on the assumption that most organizations can apply relevant elements to their specific environments.

Because of the complexities in describing the typical document environments, we structure the review into the following sections:

• Digital office documents for such documents in general;
• Electronic mail (email);
• Technical and engineering drawings;
• Document imaging;
• Web content; and
• Physical documents.

Our objectives are to provide a description of the functionality that applies in each of these environments and to provide an indication of the limitations that apply for each of the document types.

Therefore, at the end of each section, we have included a brief generic checklist. The checklists avoid expressing limitations with respect to specified types of business. We do not endeavor to be exhaustive or prescriptive. The checklists are provided to provoke readers to undertake further research and identify limitations with their own enterprise document environments and to build their own lists of limitations.

We begin by describing typical methods used for managing electronic or digital office documents in general.¹
DIGITAL OFFICE DOCUMENTS

We recognize that email, digital drawings, digital images, and Web content are digital documents and could be described in this section. However, each has unique characteristics that warrant individual attention, so we will discuss these characteristics separately in following sections.

Document Authoring Tools

The types of PC desktop authoring applications that are available within enterprises generally comprise word-processing, spreadsheet, presentation graphics, and email facilities. They may also include more specialized tools such as project management software, drawing tools, Web authoring tools, and specific types of desktop publishing tools, to nominate representative types.

Enterprises may also have provided users with particular types of desktop authoring tools that are designated for specific purposes. For example, mathematical calculation tools and other types of scientific analysis tools, which may not be widely distributed on enterprise desktops.

Document Creation and Receipt

Digital office documents are typically created using desktop authoring tools in the following manner:

- Create new document from a template
  Many desktop applications, such as word-processing systems, provide the facility to create templates. Templates are files that contain formatting to allow a document to be created for a specific purpose (such as reports; specifications; and correspondence items, such as memos, minutes, agendas, facsimiles, and letters).
  Typically, standard templates are stored in a template folder on a networked drive. The author keys the required data into the template document, using predetermined captions within the relevant template as a guide. Some templates are configured to help standardize the presentation of documents, for example, by generating header and footer information, inserting objects such as logos, and providing page numbers and copyright notifications.

- Create new blank document
  Desktop authoring applications provide the facility to create a new blank document. In reality, the blank document is usually based on the application’s native blank-document template.

- Reuse digital document
  The author opens an existing document and either (a) saves the document as a new document, or version, and then edits the document; or (b) edits the document, then saves it as a new document or version.
  Existing documents may also have electronic notes added to them without actually modifying the original, but creating a new digital object.

- Generate database reports
  Digital documents may also be generated as reports from database applications. These reports are often saved as part of the application system storage module or