

Document Library A Case Study

THE PROBLEM

The Production Support group for Blue Shield of California's mylifepath.com needs to be able to answer questions about the website's business-oriented functionality. They do this by consulting electronic documents written during software development projects large and small.

The documents the Production Support group consult have several relevant characteristics:

- They are authored by Microsoft Office programs like Word, Excel, PowerPoint, and Visio.
- Some are published as Adobe Acrobat PDF files.
- They are written by many different people.
- Typically these documents reside wherever project team members leave them—across a variety of file servers and proprietary technologies like eRoom.
- The business-oriented documents are commingled with project-only working papers and draft versions of the same documents.
- There is no consistency of appearance, content, and filenames.

The Production Support group needs quick and easy access to documents in a way that is free of software license issues and file access permission issues. Furthermore, they want to extend this access to the mylifepath developers and associated business staff.

THE SOLUTION

The solution provides a single repository on a file server with two access paths: (1) a published catalog containing metadata and a classification (taxonomy) of subject and content, and (2) a full-text search. A website establishes the library's presence and access to the published catalog and search engine. It also provides a document submission tool that researchers can use to submit individual documents to the library administrators for consideration. A separate library administration application contains both the raw catalog data and tools to audit and maintain the catalog and repository.

Some key features of the document library:

- Administrators add documents to the library when they are deemed to meet the entrance criteria. Qualifying documents are copied into the library. Metadata and classification data are entered manually into the catalog.
- Catalog entries may be incomplete. This allows documents to be added to the library even when not all metadata and classifications are known. "Virtual"—missing—documents can also be added to the catalog; they have no filename.
- Documents can be classified by a two-level subject and by a two-level content. The taxonomy is populated to meet the needs of the library users and can easily be changed.
- Raw catalog data is "published" at the discretion of the administrators.
- Library users open documents with hypertext links in the published catalog and in the full-text search results list.
- The repository has only one level of subdirectories. A hierarchical directory structure is not used—it is the catalog that "organizes" the documents.
- The library avoids dependencies on standards and procedures.

This document library uses simple technology free of seat licenses. It runs in a Windows NT/2000 environment. Its need for ongoing technical support is minimal.

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OUR CONSULTING SERVICES

This library was designed, developed, and implemented in two months. A pilot user test was conducted. Administrators were trained. Administrative procedures were documented thoroughly as was the library's technical design.