# Interactive Document Management System

## A document management system is a system used to receive, track, manage and store documents and reduce paper. It is capable of keeping a record of the various versions created and modified by different users. In the public health scenario, health facilities often see high levels of staff turnover. Oftentimes, this means constant re-training of staff, which many times is left to the departing staff to quickly train their replacements, or the remaining staff will train new staff quickly as they continue to perform their existing job duties. Without standard existing protocols and training, it is likely that some best practices are not sustained across staff turnover, and program advancement may be set back each time there is new staff. To assist with the accessibility of materials for new and existing staff, we will create a document repository. This repository will be a well-organized document space where facility-level staff can access training materials, best practices, SOPs, job aids, etc. These documents will be made easily accessible in order to promote increased usage and adherence to previously created and validated documents, promoting consistency in training and programmatic implementation, both across time points and between facilities.

## Structure

Ideally this repository will adhere to the following best practices for files/folder structure:

* No more than 3 folders deep (never need to click through more than 3 nested folders to locate a file)
* Third folder level would be designed by users themselves, for flexibility
* Folder titles will be short yet descriptive
  + No repeated folder names in various paths. I.e., do not have a sub-folder named “Final” in two separate parent folder paths.
* File naming convention will be set for each base folder
  + README.txt file which explains the naming convention as well as any acronyms used
* File naming convention best practices:
  + Short, descriptive names (<25 words)
  + Use capital letters and underscores/dashes to separate words. Do not use spaces.
  + Do not use special characters (e.g., !@#$)
  + Format dates as YYYYMMDD or YYMMDD
  + Include a version number
  + Use leading zeros in version numbers (e.g.,use “01, 02…21, etc” instead of “1, 2…21, etc.”)

*The following is the proposed folder structure for the document repository:*

1. [FOLDER] Training / New Staff Resources
   1. [FOLDER] [this folder level would be the various programmatic areas]
      1. [FOLDER] [This folder level could be the various job positions]
         1. [FILE NAMING CONVENTION] ***date.developed\_job.title \_author\_type.of.training***
2. [FOLDER] Best Practices
   1. [FOLDER] [this folder level would be the various programmatic areas]
      1. [FOLDER] [this folder level could be more specific as needed, either by geographic area, more specific program area, current/outdated, etc.]
         1. [FILE NAMING CONVENTION] ***date.developed\_title.of.document \_author\_version#***
3. [FOLDER] SOPs
   1. [FOLDER] [this folder level would be the various programmatic areas]
      1. [FOLDER] [this folder level could be more specific as needed, either by geographic area, more specific program area, current/outdated, etc.]
         1. [FILE NAMING CONVENTION] ***date.developed\_title.of.document \_author\_version#***
4. Etc…

Graphical user interface, application, table

Description automatically generated

Graphical user interface, application

Description automatically generated

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application, email

Description automatically generated