

Sara Stewart

717 Grosvenor St., London, ON N5Y 3T7
226-504-5294 sara@sara-stewart.com

Information Management Business Cases

Executive Summary: This document will outline client/organization problems in information management, and how I addressed them, based on the client needs and context. Some cases involve hard copy assets, some digital assets, some a mixture of the two.

North American Cable Projects

The Environment: Working as lead technical writer for North American Cable Projects, Professional Services, NDS Canada and Cisco Systems Canada

The Problem: Each individual deployment/project required a suite of documentation, which needed to be stored in a central repository. Users needed to be able to find the documents using keywords, saved searches, and document control numbers.

The Solution: With superuser (administrator) access to the NDS (built on WorksiteMP) and Cisco (in-house bespoke) document management systems, I created workspaces for each project/deployment based on existing company guidelines, assigned a document control number prefix (for NDS, e.g. COGEC- for Cogeco), uploaded documents, applied version and security controls, created saved searches, created metadata for the workspace and documents, and communicated the workspace location(s) and details to the appropriate team members. I also managed updates in project information where required.

The Legal Case

The Client: A small law firm

The Problem: The firm inherited a large, complex case from a succession of other lawyers. The case material was disorganized and contained in two legal cases ("brads"), and consisted of hard-copy letters, briefs, case judgements, and other materials. I was instructed to catalogue the contents of the brads, and make it easy for the lawyer to find given materials.

The Solution: I created an index of the materials consisting of a descriptive title, date(s), location, and a short description of the item, e.g. "Letter from John Doe to Jane Lawyer regarding disposition of assets, 3 June 2010, second pocket of first brad, first item. The letter outlines the assets which were to be sold at this time, and instructions to Lawyer on how to proceed. Marked with a Received stamp, dated 10 June 2010."

Sara Stewart

717 Grosvenor St., London, ON N5Y 3T7
226-504-5294 sara@sara-stewart.com

Documentation Start-Up

The Environment: A small company that had never employed a technical writer before, and needed a complete documentation suite and management system

The Problem: The company did not have any documentation or any organized document management systems or protocols in place. Information was stored “wherever,” or things were simply undocumented.

The Solution: I created a folder architecture for storing documentation and documentation-related materials (e.g. graphics, help call files). Since the company already used Visual SourceSafe (VSS) to provide code management and version control, I added these locations to VSS. As I added more projects, I expanded the folder list and updated VSS locations.

The Estate

The Client: A private citizen whose sister had died suddenly

The Problem: The decedent’s papers needed to be organized and catalogued to determine what the estate’s assets and liabilities were, and to facilitate filing a final tax return.

The Solution: I sorted the papers by type, then further sorted them into chronological order, placing them into labelled file folders in large plastic document boxes. By taking this approach, we were able to see that the decedent had mutual funds her executor did not know about, and also ascertain if any statements or other documents (such as bills) were missing or unpaid.

The Chapbook

The Client: A small press

The Problem: I was engaged to produce a chapbook on the history of streetcars between 1920 and 1940 and the reasons for their decline and disappearance. I needed a body of primary and secondary sources to make my case. I accessed specialized databases, including Lexis-Nexis and FindLaw. I also used video files from Archive.org, specifically the Prelinger Archive, and print sources. This created a large library of digital and hard copy files out of which I needed to be able to take citations and find keywords quickly.

The Solution: I used specialized software (Mendeley) to help track digital assets, and created a fine-grained folder architecture to store the digital files. I created lists of cross-referenced keywords with page numbers and locations using OpenOffice Calc to help track references in hard copy assets.