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**Sent:** Friday, June 29, 2001 8:13 AM  
**To:** Patsy Clegg (E-mail)  
**Cc:** Patrick Beatty (E-mail); Paula Podhasky  
**Subject:** Document Management System  
Patsy,

I am now able to turn my attention to one of the concerns you had voiced in the last few conference calls, namely developing a document management system. Before I get too far into the planning, I thought that I should get some better understanding of your concerns. As I see it, there are three main concerns with setting up a system such as this and how the system is to be configured will depend on which concerns are to be applied.

1. **Document Filing** - This is basically developing a logical system for organizing the documents for later retrieval and for archiving aged documents. This is the basic foundation of any system and will naturally be included in any design.
2. **Document Tracking** - This is the next step up in complexity. In addition to organizing the physical documents, this aspect of the system could include a number of elements: a) track the distribution of any version of a document as it makes its way through an approval process, including revision history if deemed necessary; b) tracking of final documents to groups outside the consortium; c) logging in and out of documents from the "library" of documents; and others.
3. **Document Security** - This is the most rigorous aspect and could range a wide spectrum, from simply having sensitive documents kept in a locked filing cabinet (no special locking mechanisms), to placing documents in hasp-bar locked filing cabinets located in an inner office with only one door having a cipher-lock (punch-key combination lock) installed. The level of security could also include developing a list of persons cleared to review certain sensitive documents if confidentiality is an issue. Top-level security would probably not be warranted for all documents, so several levels may be instituted and documents treated according to the need for confidentiality.

I am sure that there are other aspects to designing a document management system that I have not touched upon, but at least wanted to get the conversation started.

Thank you,

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