

EXECUTIVE DOCUMENTS TRACKING SYSTEM

What It Is

Most large organizations use a computerized executive documents management system (EDMS) to manage the tracking and transfer of files prepared for senior management.

The EDMS will keep track of who is responsible for the file, who has it at any given time, when it is due to arrive at the next step in the process, and whether it is overdue in arriving there.



The EDMS also controls the movement of the e-file of the document itself. When the hard of a copy file moves to another office, the e-file of the document itself is transferred to that office at the same time. At that point, no other office is able to modify the e-file. Until the file is transferred elsewhere through the EDMS, that office alone is responsible for:

- reviewing whatever action has been requested or taken to date; and
- preparing or revising documents as needed.

How It Starts

An executive document could be initiated in many ways. For example, it could start with a request from your minister or deputy minister, or it could start with a letter a stakeholder has written to them. In those cases, the document will be logged into the EDMS very early in the process. An executive document might also be initiated at lower levels of the organization, in which case it might not be logged into the EDMS until late in the process. Either way, once the file has been logged into the EDMS you will be obliged to adhere to its procedures from then on.

What this Means for An E-file That You Have Worked On

Once you have submitted a draft of a document for which you are responsible, the e-file for it will be placed on the EDMS. From then on, any number of other offices might review and revise the e-file.

In addition, you might be asked to revise the file later in the process. By that time, however, the e-file in the EDMS might differ significantly from e-file that you tucked away in your own computer. Before starting your revisions, make sure that you obtain the latest version of the e-file from the EDMS. Otherwise, you may end up undoing all the work that has been done on the file after it left your office the first time. If you have any doubts about whether you are working with the right version of the e-file, contact your executive documents coordinator.

Highlight the Changes

When you are asked to revise a document after it has gone to other offices, flag your changes on the draft. Any method will do — underlining or felt highlighting on the hard copy, or computerized tracking on the e-file.

The moments you spend doing this could save a dozen people or more from having to read the whole document word for word to see where you have made your changes.