

The need for document naming/storage policies

Organizations are being inundated with a steady stream of electronic documents flowing from both internal and external sources. Most of these documents are information assets that are extremely valuable and critical to operations; unfortunately quite often, there is no policy in place to enable stakeholders to diligently manage them. This is partly due to a general “laissez faire” attitude toward implementing [electronic document management policies](#) in the workplace. The result is a prevailing free-for-all methodology in the naming and storing of electronic documents which, in turn, become sometimes impossible to retrieve. The consequences can be very costly in terms of productivity and information asset loss. It is, therefore, an absolute necessity that document management policies be instituted wherever electronic documents are an integral part of operations.

The filing policy planning process

Regardless of whether one intends to deploy a dedicated [record/document management system](#) or just implement manual document filing procedures, planning a document management policy is a prerequisite. Policies should, as a minimum, describe in detail the storage and [document naming conventions](#) and in some cases the metadata requirements that everyone must follow when saving critical corporate documents. Building a filing policy is not rocket science. Nevertheless, there are two basic challenges to get a filing policy planning initiative off the ground: the first is having strong leadership to kick start the policy planning process, the second is the planning process itself. Some of these planning initiatives can drag out for weeks because they generally involve frequent communication and coordination between multiple stakeholders. Therefore, success in the policy planning process especially requires effective collaboration. The process can vary as per the scope of the policy, but fundamental activities notably include: developing structured storage and naming conventions for the applicable operational entities, reworking, documenting, getting approval, and finally disseminating the policy.

How a policy planning wizard helps

A [filing policy planning software wizard](#) could help streamline the process immensely. The wizard’s policy planning templates could be used as foundations for building custom policy profiles to help fulfill specific department or workgroup needs. Multiple versions of policy profiles can be built that could be further merged and refined to facilitate consensus and strategic approval. The resulting report file that the wizard generates could be disseminated and become the official filing policy reference document that may be shared by all stakeholders. This policy report would be used for guidance to ensure that the proper storage and naming of documents is consistently employed to ultimately facilitate efficient and precise search, identification, and retrieval of all pertinent electronic documents. *For more information on filing policy planning via a software wizard, you may refer to the [White Paper: Document Management Policy Planning for the Paperless or the “Less-paper” Office](#).*

Benefits

Once an electronic document management policy has been instituted, a common set of guidelines will be available that everyone should follow. Assuming that all stakeholders have agreed to make a concerted effort to consistently adhere to the policy, the [key benefits](#) can be enormous to both the individuals and the organization. These are:

1. Easier and faster accessibility and sharing of documents by team members.
2. Operational continuity in the event that any team member leaves the organization or is absent.
3. Increased productivity because documents can be retrieved quickly and precisely.
4. Restored confidence and a lesser need for maintaining personal copies of the same electronic file.
5. Reduced need for attaching documents to emails as a mechanism for internal file-sharing.
6. More reliable and manageable backups because of designated storage repositories.

Conclusion

Deciding to institute document management policies takes some initiative because it involves serious planning and also changing the status quo with reference to corporate storage and document naming attitudes and habits. However, the longer one waits the more crucial it gets, because electronic documents are quickly becoming the mainstream means of conducting business. A decision to start filing policy initiatives is clearly a responsible one; using a filing policy wizard could surely help make the decision and the undertaking a snap.

About the author: Vincent Santaguida is the CEO and founder of MultiCIM Technologies Inc. He writes [articles](#) and speaks on subjects dealing with paperless office and information asset management strategies as a means of encouraging productivity.