



eXadox MSO (for **M**icrosoft **O**ffice) is a simple and affordable collaborative file naming add-in for the MS Office suite (Word, Excel, and PowerPoint). It can be deployed quickly to enable all MS Office users to standardize on an agreed-upon structured file naming convention when naming or renaming files within an MS Office application. Logical and precise file naming can serve as a strategic backbone for a more cohesive and efficient approach to managing and sharing documents.

The **eXadox** intuitive interface and multi-profile feature allows you to easily employ structured file naming rules on a company-wide, departmental or workgroup basis in a seamless manner from within MS Office. Each profile can be setup with its unique file naming format and pre-designated destination path where files can be stored and shared with other team members. The file naming format can take advantage of long file names and is segmented as per your standards. Each segment can be auto-populated by simply clicking on entries in your company managed smart lists. The smart lists may be for supplier names, client names, project names, document types etc.... The lists may be imported from your business or CRM systems.

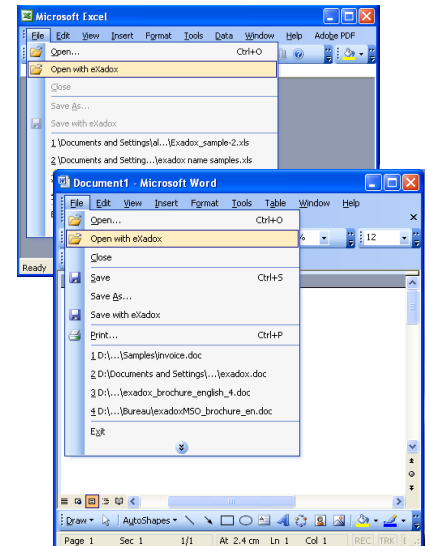
Benefits :

- Promotes corporate-wide conformity in naming files.
- Removes the guesswork out of proper file naming.
- Operations continuity in case of staff transfer or turnover.
- Immediate identification of content via data-rich file name.
- Efficient document access from designated disk repository.
- Increased productivity and reduced operating costs.
- Complements workflow and records/document management systems
- Facilitates better document sharing between staff.
- Cost-effective no fuss document management.



Features :

- Operates seamlessly within Microsoft Office Suites (2000, XP, 2003, 2007).
- Fast and easy scalable deployment (single user to company-wide).
- Can be used as a document archival and retrieval system for MS Office files.
- Instant view of full document content without opening within MS Office.
- Shared profiles feature for enterprise, departmental and workgroup collaboration.
- User-controlled structured file naming convention definable for each profile.
- Destination folder and filenames auto-populated by selecting items from user managed pull down lists.
- Profiles for file naming can be shared, copied and personalized by users.
- Profiles may have their own unique pull down lists.
- Lists consist of IDs and optional additional descriptive columns (e.g. client address, or birthday).
- Sub-Folders are auto-created using lists imported from business or CRM systems
- Provisions for metadata input.
- Automatic document version numbering.



The solution for collaborative MS Office file naming & storage

Naming a File :

To name or rename a file using eXadox MSO: From the **File** menu or **Office** button in the MS Office application just click on **Save with eXadox**. Select the specific Profile and destination subfolder(s) enter the information to auto-populate a structured and easily identifiable filename. Click **Save** to name or rename the file. If you wish to save the file to a different format select the desired format prior to saving.

The default **eXadox MSO** structured file naming is segmented as follows: (Note: each segment is optional)

Sub-Folder_RefIDList_RefID_DocType_DocName_Version.doc

Sub-Folder is the sub-folder name or primary entity (e.g. Client Name) for which the document will be filed. The user has the option of having this automatically included as a prefix to the filename.

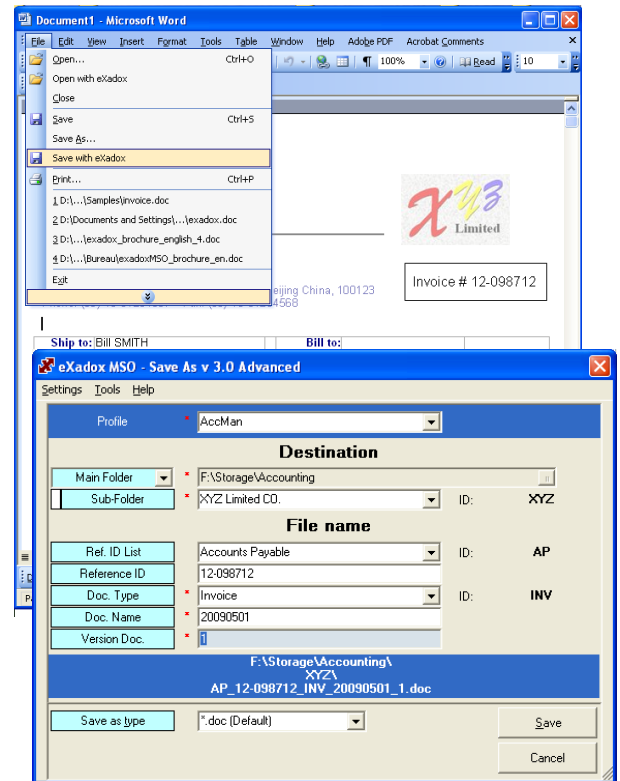
Reference IDList is a smart list of possibilities that can logically categorize the primary entity or perhaps the type of documents involved. (e.g. for employees: department; for Insurance: insurance companies)

Reference ID is a free-text segment used to help identify a specific document or a group of related documents. e.g. a contract no., a policy number, or a date

DocType is selected from a user-defined smart list. (e.g. LTR: Letter; INV: Invoice; CON: Contract)

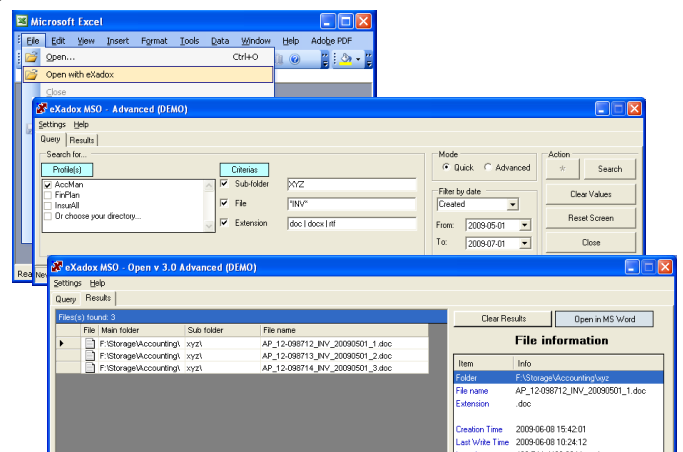
DocName is a free segment used to provide specific information on the document content or purpose. (e.g. invoice date, years term.)

DocVersion may be entered by user or will auto-increment if the same constructed file name already exists.



Opening a File :

To Open a file using eXadox MSO: From the **File** menu or **Office** button in the MS Office application just click on **Open with eXadox**. Construct your file name search string by selecting items from your pull down lists for the applicable fields. These are identical to lists that were originally used to populate the file name in **Save with eXadox**. Select the applicable profiles and folders you wish to target and click **Search**. To verify if the file that you wish to open is the correct one, instantly view the thumbnail and scroll through the pages to examine the content. Once satisfied click **Open** to open the file in your MS Office application.



eXadox MSO is available in three versions: Basic, Standard and Advanced. The features and flexibility of each version varies as it relates to Profile creation; however they can all share and exploit the same Profiles. The Advanced version enables the highest level of customization and personalization to create and share highly sophisticated Profiles. The Standard version enables personalization, creation and sharing of Profiles derived from the default **eXadox** Profile. The Basic version can personalize its private use Profile only but can take advantage of all shared Profiles.

Cost: Starts at \$95 US per licence for Basic version (first year maintenance incl.).

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