

Migrating towards paperless-office practices invokes the need to cope with larger amounts and varieties of electronic documents. Acquiring a document management system could help but there are significant costs and complexities that may be too difficult to justify. A more expedient approach is to adopt a structured file naming policy to help manage your documents affordably and effectively. Structured file naming is a powerful yet under-exploited tool for indexing documents. It is a very efficient means of searching and retrieving documents. This article briefly explains how to apply this concept.

Although “structured file naming” may be an unfamiliar term for some, many computer users actually employ the practice without realizing it. If you are naming your file with two or more descriptive segments and are making a conscious effort to be consistent, you are applying a structured file naming strategy. To better appreciate this concept, we may take the following structured file name example:

GLOBAL-LIGHTING_P76328_INVOICE_2009-1-25.PDF

In this example it is relatively clear by the file name that this document is an invoice numbered P76328 from a supplier, Global Lighting, that was issued on January 29, 2009. The file name can be improved further by taking advantage of abbreviations (IDs) that will make the file name more concise. The result would look like:

GLOBAL_P76328_INV_090125.PDF

Regardless of the method, it is important to always ensure that all the critical descriptors relating to your document are included in the structure and that you consistently adhere to it. Ultimately, your productivity and efficiency in retrieving and identifying documents is a function of how well you executed your own naming policy. If you were diligent you will be able to avoid having to open a slew of files to identify the desired document.

Information-rich structured file naming helps improve your efficiency immensely. You will no longer have a heavy reliance on complex multi-tiered hierarchical folder structures. Nevertheless we still recommend that you maintain a sub-folder for the primary filing entity (e.g. client, supplier, employee, project, etc...). Conversely, if you have dedicated sub-folders for each entity we also strongly recommend that you continue to

include the name of the entity as a prefix in the structured file name. In other words, although you have a sub-folder dedicated for Global Lighting Company, the company name **GLOBAL** should still be present in the filename. Here are a few reasons why:

- It minimizes search result ambiguity.
- Misfiled documents can still be located.
- Mobile documents can still be easily identified.
- Searching is more direct and precise.

A general purpose file name structure that could work in just about every situation is as follows:

SUB-FOLDER NAME_REF ID LIST_REF-ID_DOC TYPE LIST_DOC NAME_VERSION. EXT

In this structure **SUB-FOLDER NAME** is synonymous with Primary Entity Name (e.g. Supplier Name/ID). **LIST** implies that the entries are based on a finite predetermined list of possibilities. It is not a free text field. To illustrate how this structure can be used, please refer to the following examples:

GLOBAL_GENEXPENSE_P76328_INV_090125.PDF
SMITH-J_SUNLIFE_367450_POLICY_EXP120215.PDF
LAGOCONDOS_PPELEC_5786_SUBCON_H&L.DOC

How many segments and which segments you opt for is strictly your decision unless you need to work collaboratively as part of a business unit. In this latter case, consensus is required with coworkers or failure is likely. Other reasons for potential failure in manual structured file naming could be:

- Segment order is unintentionally compromised.
- Inconsistencies in what is entered.
- Repetitive tedious keying of file name entries.

If you work alone and you could manage with a very simple file name structure, chances of success are good. If several coworkers are involved in the naming of shared documents, take a look at a semi-automated structured file naming tool to ensure integrity, policy adherence and overall success. For more info visit www.exadox.com or refer to: **eXadox White Paper: Semi-Automated Structured File Naming and Storage**

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