

# White Paper : Semi-Automated Structured file naming and storage



*A simple strategy for more effective  
document management*

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# Introduction

## Overview

As we increasingly adopt paperless-office practices, it becomes readily apparent that the quantity and types of documents that need to be accessed and managed daily are ever increasing. In addition to Microsoft Office documents, we need to cope with the cornucopia of e-mails, scanned images, graphics, photographs, drawings, PDFs etc... The task can be especially challenging when working with shared files that originate from various sources that were created by "someone", named "somehow" and stored "somewhere".

Everyone does their best to avoid potential chaos but one's best may not always be enough especially when having to operate in a collaborative work setting. Standardized file naming, file indexing and file storage policies are essential to ensure optimum efficiency and productivity in any organisation. However, enforcing such policies without the proper software tools can be extremely difficult. eXadox helps address these issues by using a semi-automated structured file naming and storage strategy that is easy to implement and exceptionally affordable relative to conventional document management systems.

## Indexing and storage of documents

Most document management systems are designed to manage the storage and retrieval of documents after they have been scanned-in, received or created. The strategy for indexing the document for subsequent retrieval is generally based on metadata that the user must manually input for each document. Metadata is a very useful method for the indexing and subsequent retrieval of documents; however for most corporate environments, implementing a policy of structured file naming and storage would be both more effective and efficient. That extra step of having to index each document using metadata would be minimised if not totally eliminated when using this approach.

## eXadox semi-automated structured file naming and storage solution

Semi-automated structured file naming and storage is a simple strategy that can be utilised for no-fuss document management or as a complement to a conventional document / records management system. The rationale is that if you have assigned a meaningful well structured name to your file, stored it in a prescribed location, everyone can easily locate the specific document and immediately also identify that it is the proper document.

The interesting challenge is how to enforce and implement a structured file naming and file storage strategy across a team, a department or a company? The first action item is to bring everyone onboard by letting them understand the concept and the underlying benefits for the day to day operations. They will then appreciate that with minimal effort they could improve their productivity and ultimately that of their team and the company. The next step is to install eXadox on each participant's computer. The number of participants is not an issue because eXadox is scalable. Furthermore, there are no expensive IT infrastructures and deployment efforts involved because eXadox is a stand-alone collaborative application that takes advantage of the standard Microsoft file management system of the stations/servers in the network. Of course, some initial effort would be required to decide on the file naming and storage policies in the organisation but setting up eXadox Profiles to maintain policy adherence just takes minutes.

## White Paper Scope

The purpose of this White Paper is to: introduce the concept of structured file naming and storage; discuss the implementation issues and benefits; describe the eXadox solution.