"eXadox is helping us better manage the way we name and save our electronic documents by ensuring that everyone is adhering to our company's file naming and storage policy."

Chris Osborne, President, the SWT Group

Summary

Company: the SWT Group
Located: Windsor, Ontario, Canada
Web Site: www.swtgroup.com
Activity: Manufacturing/Distribution
Implementation: Internal Staff

Challenges
- Maintaining precise adherence to file naming policies by all staff members.
- Abbreviating supplier and client names consistently in the file naming of electronic documents.
- Finding a method to streamline the file naming process.
- Facilitating the precise search and easy identification of electronic documents.
- Finding a software solution that is easy to setup and use.

Solution and services
- eXadox DT Advanced edition for IT management staff to create profiles.
- eXadox DT Standard edition for other staff members.
- Support services from MultiCIM Technologies Inc.
- Installation, customisation and training conducted entirely by internal SWT staff.

Highlights
- SWT Group internal staff managed to install and define initial naming policies in a couple of hours within eXadox.
- Setup file naming and storage policies for several departments very quickly using the eXadox Profile creation tools.
- All hands-on activities were executed entirely by SWT staff using eXadox documentation and minor tech support.

Benefits
- A central method of managing file naming and storage policies.
- A more efficient and reliable procedure for indexing and retrieving electronic documents.
- Improved productivity conforming with paperless office strategy
- Ability to provide a better service to clients and suppliers.

Last year the SWT Group decided to embark on a paperless office strategy to increase their productivity. They managed to transform their business into a quasi-paperless transactional environment by encouraging their clients and suppliers to use emails or faxes as a means of placing orders or sending invoices. The faxes were handled by a "fax to pdf" service that sent the pdf version as an email attachment to SWT. The emailed pdfs were redirected internally to applicable departments that would file the electronic documents and then process them. Part of the filing process involved descriptively naming the files to facilitate their search, identification and retrieval.

The file naming process was quite cumbersome and it was difficult to enforce consistent adherence to the file naming policy of the company. One of the key issues was that part of the file naming structure required an abbreviated form of the supplier or client name. The end result was that different staff members created and used different abbreviation variations. There was some concern that in some circumstances it could be difficult to precisely and efficiently retrieve applicable documents.

Chris Osborne, the president of the SWT Group, made it his mission to find a more automated solution that could control the file naming and storage of their electronic documents. He came across and read the eXadox White Paper that addressed those specific issues. He contacted MultiCIM, the developer of eXadox DT/MSO and delegated responsibility to Craig Nussey, their IT Administrator, to evaluate the eXadox solution.

Craig downloaded the software and managed to install and define some preliminary file naming and storage structures in a couple of hours. He found the interface intuitive enough that he relied on the user manual just to get acquainted with some of the finer details. MultiCIM tech support helped him answer a couple of questions but he managed deploy the eXadox file management solution very quickly and with little assistance. He also took responsibility of orienting the SWT staff in the use of eXadox.

"Our eXadox deployment went very fast and smooth. I wish all projects could be this easy."
Craig Nussey, IT Administrator, the SWT Group