

It might come as no surprise to learn that although most organizations have a reasonably functional paper filing system; this may not be the case as it pertains to their electronic [file management system](#). Unfortunately, a “laissez faire” attitude still prevails in most offices when it comes to managing electronic files. The responsibility is commonly left to the individual and rarely with the benefit of an established file naming and storage policy or directives. An electronic file management system does not have to be complex or expensive to be functional; it can be a simple matter of naming and storing files as per a storage and [file naming convention](#) derived for each specific business activity in the organization.

The following steps should be taken to strategically plan for a functional electronic filing system that exploits structured file naming and storage conventions:

1. **Compartmentalize the company's business activities into discrete components.** This may be by departments or by business-units. Examples: **Accounting:** accounts payable, accounts receivable, purchasing; **Sales:** marketing, customer service, order processing; **Manufacturing:** production, shipping, receiving; **Human Resources:** recruitment, benefits; Health and Safety: prevention, incident reporting, case-tracking.
2. **Categorize the electronic files (documents) for each business activity.** Are they invoices, orders, quotations, receipts, contracts, drawings, specifications, correspondence...?
3. **Analyze what are the origins of these files and their format.** Are these scanned documents, electronic faxes, emails and attachments, PDFs, Microsoft Office documents ...?
4. **Devise a structured storage plan for each business activity based on the above realities.** This should include a minimum of one folder for each business activity, a sub-folder for each department or business unit; a sub-sub folder for each discrete entity. A discrete key entity is always different depending on the business unit. E.g. client, supplier, employee, product, project
5. **Establish a structured file naming convention for each business activity** that enables everyone in the business unit to easily and descriptively name each electronic file for subsequent fast, efficient and precise search, identification and retrieval. File names should be intuitive and complete such as in the example below:
Accounts Payable: SupplierName_InvoiceNo_DocType_CostCenter_Date.FileExt
GlobalProducts_05475_INVOICE_OfficeSupplies_2010-08-15.PDF
6. **Educate and monitor the staff to ensure adherence to the new electronic filing system approach.** If the filing system is not followed by the participants and not monitored it would have negative consequence to the productivity and efficiency of the organization.
7. **Although it is possible to manage filing systems manually, for best results consider [file management software](#)** tools to help manage file naming and storage policy adherence throughout the organization.

This electronic file management strategy requires little investment and is quite simple to execute; however the biggest challenge is typically one of leadership. This undertaking can be easily initiated by just about anyone on a small scale; however it requires the right kind of leadership to have the vision and drive to see it applied as a wider policy. There is very little to lose but plenty to gain from the resulting efficiency and productivity. After instituting this approach any operationally critical file can be retrieved instantly and precisely by all stake-holders. It just takes someone to at least start the ball rolling!

About the Author: Vincent Santaguida is CEO of MultiCIM Technologies Inc, the developer of the [eXadox](#) file organizer and retrieval software. He is an avid proponent and keynote speaker on paperless office practices and information asset management.