Electronic document exchange through email attachments is providing business a forward thrust towards the adoption of paperless office practices. A significant downside is that this benefit comes with the burden of having to manage numerous emails and more importantly, to properly file the attached documents. Most organizations have instituted best-practices for managing paper documents; however, a free-for-all approach still prevails for emailed documents. Electronic documents demand a well-structured filing process just as their paper counterpart. This is especially critical in collaborative work settings where documents are shared resources. This article presents how a structured file naming and storage strategy can be exploited to efficiently file email attachments. Users may employ this strategy as a manual process or they may take advantage of eXadox for viewing attachments and semi-automating the filing process.

The value of email attachments

Business emails and in particular, the documents that are received as email attachments are information-assets that belong to the organization. They should therefore be properly named, stored and rendered accessible to other staff members that can potentially benefit or require the information for operational use. Attachments are of significant importance to the enterprise because these may include documents that are:

- Transactional - e.g. sales orders and invoices
- Legal - e.g. contracts, policies and notifications
- Informational - e.g. specifications and drawings

In the paper-based world such documents would possibly be reviewed or processed by several people and filed in departmental filing cabinets. In the electronic world, it is incumbent on the receiving individual to either forward the email or file these documents in the appropriate repository so that coworkers may access them for immediate review or processing. This is extremely important due to potentially serious consequences. For example: emailed electronic invoices or sales orders that have been improperly handled may not be processed until a supplier or client complains. These situations can be easily avoided through proper filing with the help of structured file naming and storage.

What is structured file naming?

Structured filenaming consists of a file name that is composed of a minimum of two descriptive segments plus the file name extension. To illustrate this concept, we may look at the following file naming example:

GLOBAL-LIGHTING_P76328_INVOICE_2009-1-25.PDF

In this example, it is quite clear by the file name that this document is an invoice numbered P76328 from a supplier, Global Lighting, which 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

Once a document has been assigned an information-rich file name such as the above, it becomes easy to search for, retrieve and identify. This will result in increased efficiency and overall productivity.

Some possible pitfalls

In principle, a structured file naming strategy and storage policy is easy to implement. The difficulty lies in the fact that it requires collective discipline and patience. When several people are involved it can be a major challenge to maintain file naming and storage policy adherence. Depending on the structure it could involve a fair amount of typing and an increased chance of transposing segments and misspelling or mistyping pertinent data.

A semi-automated solution

It is worthwhile to consider automating the process as much as possible so as to minimize manual input when entering the storage destination and the filename. The user should be able to simply drag and drop the document in a general purpose viewer. Skim through the document if necessary to decide under which business activity to classify it under. Choose the business activity profile and let the application semi-automatically populate the structured file name and destination using minimal input. The eXadox filing system facilitates this mode of operation by enabling a company to define a structured file naming and storage standard that each department or business unit must adhere to. To eliminate improper entry it uses smart lists that are created by importing data from the business system. These lists are used to ensure that only valid entries are accepted. The same lists can be used to perform precision search and retrieval of stored documents.

For more info refer to: *eXadox White Paper: Semi-Automated Structured File Naming and Storage*

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