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White Paper : Semi-Automated Structured file naming and storage

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A simple strategy for more effective document management

MultiCIM Technologies Inc.

Author: Vincent Santaguida
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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.

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