White Paper:
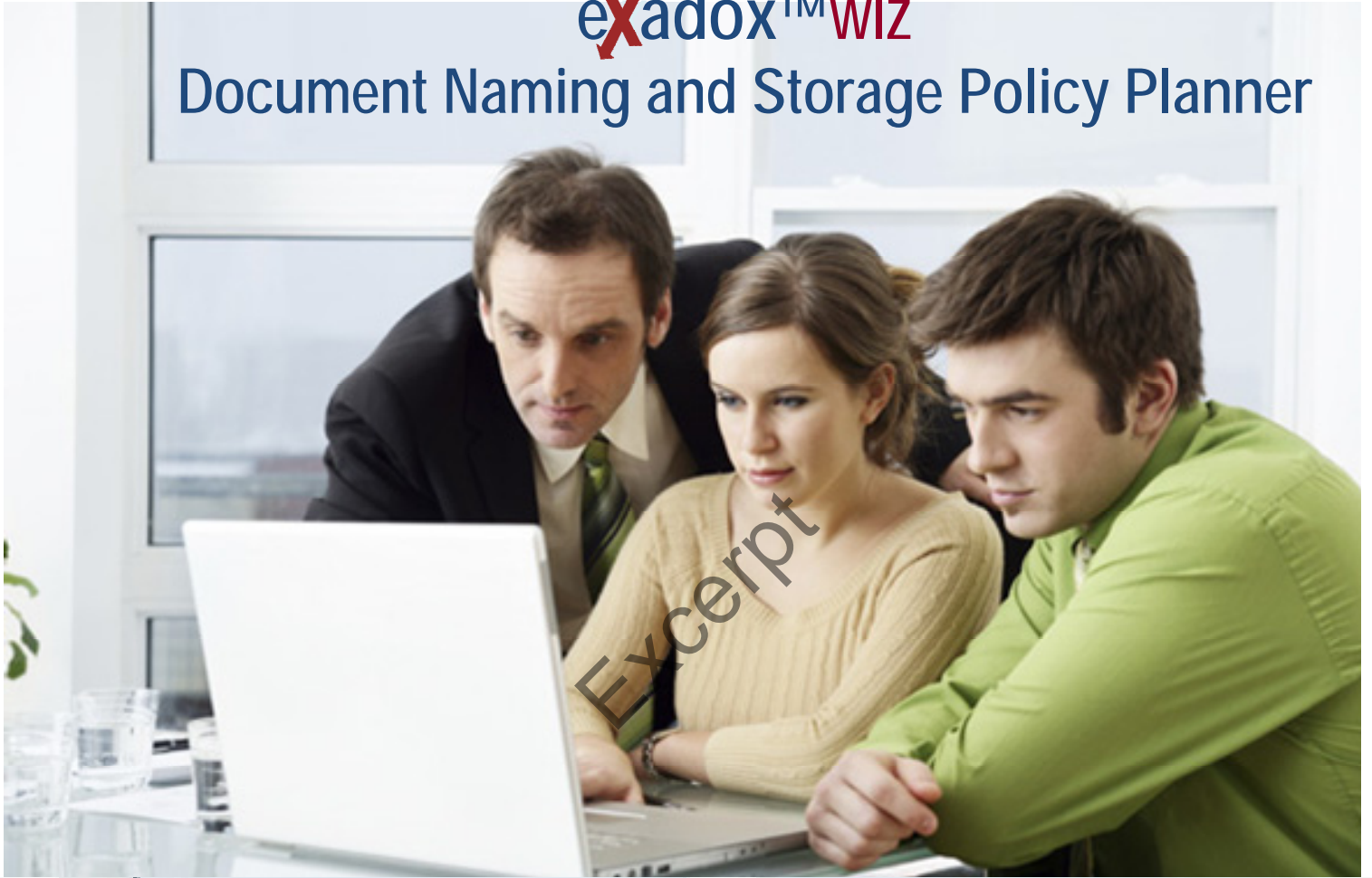**Document Management Policy Planning**
for a Paperless or "Less-paper" Office

eXadox™**WIZ**
Document Naming and Storage Policy Planner

A planning wizard for more effective document management

MultiCIM Technologies Inc.

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Introduction

Overview

The paperless office will happen because the "less-paper" office is already happening!
Organizations should be finding it easier to achieve their paperless office objectives these days because the "less-paper" office is already the de-facto operational reality. The main reason is that electronic communications and transactions are clearly outpacing paper-based ones and this trend will continue. This is readily apparent by the fact that most organizations are being deluged daily by a steady stream of electronic documents that flow from both internal and external sources. Unfortunately, very few are prepared to diligently manage this ever-growing burden because when it comes to electronic document management, a "laissez-faire" attitude often prevails. However, there is hope! By being proactive and investing a little time, potential problems can be alleviated. A basic solution can be as simple as following best practices for electronic file management by instituting document management policies for the various business activities or departments in the organization. Once established, these policies could and should be followed by all stakeholders either manually or with the help of document management tools.

Electronic document management policies are used to ensure that all electronic files are properly classified and stored as per the operational requirements of the organization to facilitate fast and precise retrieval. The proper classification of the applicable electronic files can be easily achieved by categorizing, indexing, and storing them in designated folders. The most common methods of Indexing are done by naming files and folders as per established naming rules/conventions, as well as through the use of metadata keywords.

The major challenge in creating a practical document management policy plan is the actual planning of the folder structures and the folder/ file naming conventions; the other is documenting the policies so that they can be shared and adopted by all stakeholders. The eXadox™ WIZ document storage and name planning wizard that is featured in this White Paper is a software tool uniquely positioned to assist specifically with the planning and documenting of storage and naming policies.

Planning tools for document management
To assist organizations in establishing document management policies for their electronic information assets, MultiCIM Technologies Inc. has been providing free file naming and storage policy templates on Microsoft Excel spreadsheets through the www.exadox.com website. Although this resource has been well appreciated, there was significant room for improvement. There was a need for a more elegant and a user-friendly approach to help plan and document file naming and storage policies. Hence, the eXadox™ WIZ planning wizard was developed and is now being made available for this purpose. This is the only software planner ever developed whose sole purpose is to help any organization instantly create, rework, document and share folder/file naming and storage policies. This wizard comes with basic templates that can easily be personalized and also enables the creation of new document management plan profiles from scratch. The resulting eXadox™ WIZ profiles can easily be shared with anyone in the organization or in the global community.

White Paper Scope
The purpose of this white paper is to sensitize productivity-driven leaders about the importance of instituting document management policies as an operational necessity; and provide some basic direction in the planning and documenting of filing policies. Although the policy planning and documenting process will be discussed on a general level, the main purpose is to illustrate how the eXadox™ WIZ document management planning tool can be used to simplify these tasks. References will also be made to how the eXadox DT document management tool can be used to automate the adherence to these policies.

www.exadox.com