

INFO ORGANISER

Designing your Info-Organiser Index Structure

In Info-Organiser Document Management Software, Indexes are the “tags” or “categories” you place on each document.

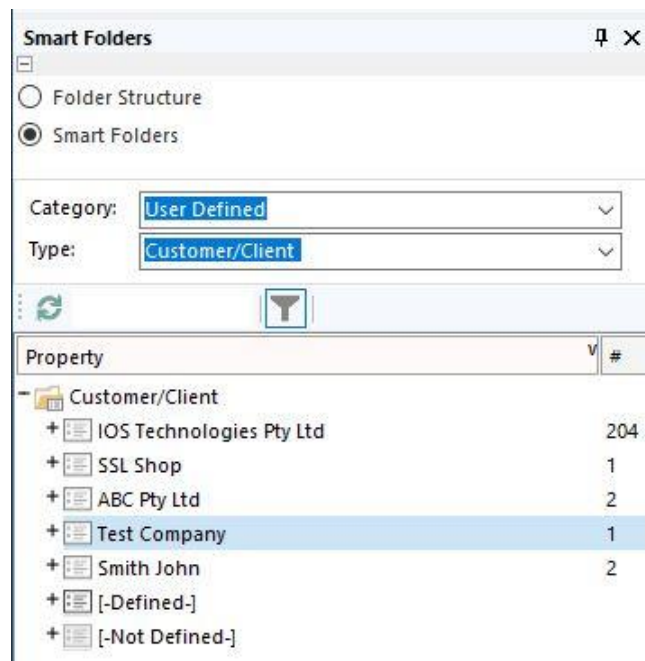
The two main purposes for Indexes within Info-Organiser DMS are as follows:

1. Indexes are used to efficiently form part of the file name. In other words, Info-Organiser generates the file name based on the Indexes you select.

The advantages of Index generated file names are:

- a. Indexes ensure that the file name follows a consistent methodology for file naming. Most businesses, unwittingly, have inconsistent protocols for naming files and file names can vary from person to person.

When a new person joins an organisation, searching for files sometimes involves guess work and mind reading. An example of this was when we implemented Info-Organiser at a Financial Planning business, where a commonly used term was ‘Superannuation’. However, filing was done using variations like: Super, Super Ann, SA, etc, making a search frustrating and time consuming. Having one term that everyone is guaranteed to use, easily selected from a drop down menu removes this problem.

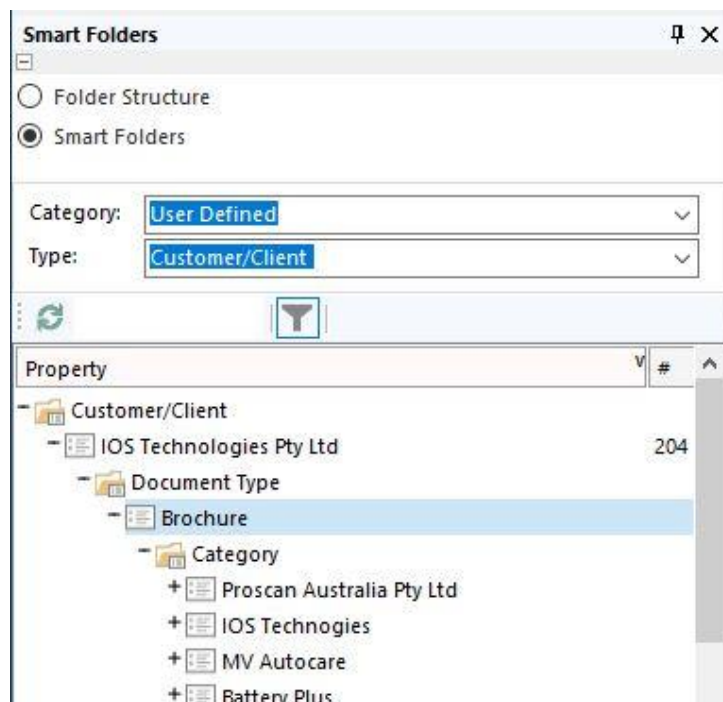


- b. Indexes save time by reducing repetitive typing and correcting previous errors and inconsistencies.

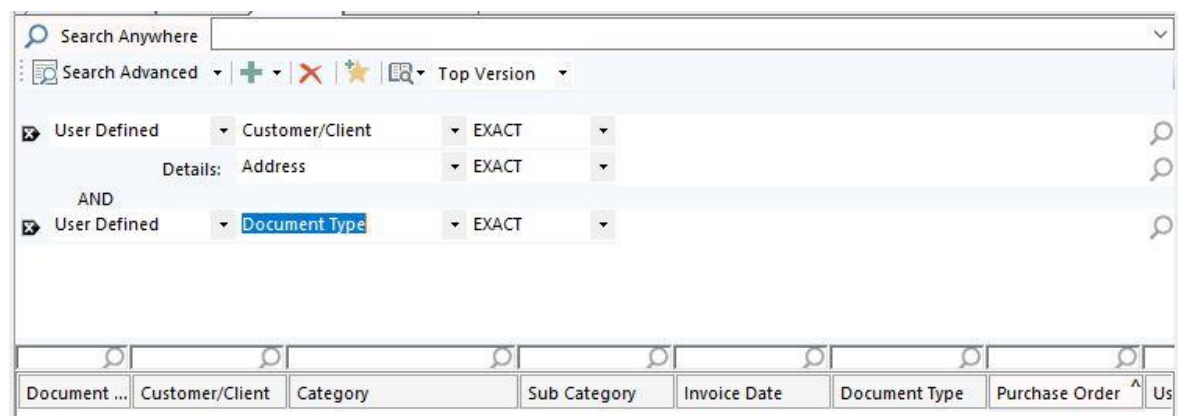
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- c. Indexes create virtual 'smart folders'. These folders and subfolders can be browsed instantly.

You can change your folder tree view by changing the Index type. This will re-arrange your folders in seconds and present your documents to you in a new folder view. Indexing ensures all document are never filed in the wrong folders or sub folders. Plus, individual users are able to adapt the folder view on their screen to be relevant to their specific area or preferred structure.



- 2. Indexing is linked to Searching. Info-Organiser DMS allows for all Indexes or combinations of Indexes to be searched.



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The ABC of Designing your Index Structure

A) Start with the END in mind.

Start with thinking about the logical ways that you will retrieve your document. E.G.: using an accounting firm as an example, the Client Name is always the primary search. Of next importance is the Tax Year, followed by the Document Type, Date, and ASIC Details. The Index structure was created as follows:

Index 1 = Client Name

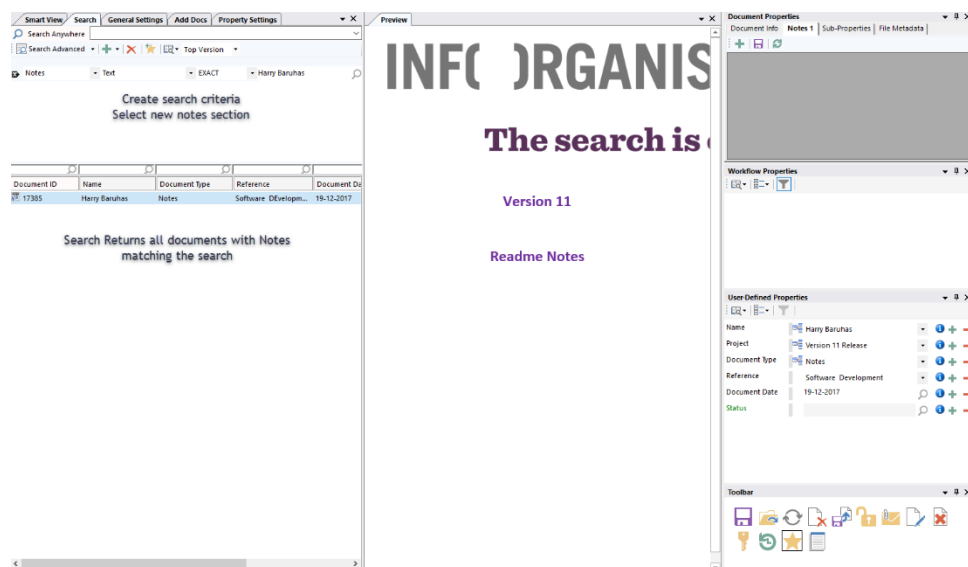
Index 2 = Tax Year

Index 3 = Document Type

Index 4 = Document Date

Index 5 = ASIC Details

The Document Summary field and can be used to add specific details and notes about the document. Notes in the document summary are also searchable. Document Summary is a free form field that caters for all types of variations.



B) Keep it simple and manageable

Start with less indexes. Most business we consult use between 5-7 indexes which is a good amount. Too many indexes can make data-entry onerous and create unnecessary confusion. As you learn to use and rely on the search function you will discover that more than 7 indexes are unnecessary.

C) Continuous Improvement

Hindsight is a wonderful teacher! Using the Info-Organiser Administration feature you can add additional indexes at any time. Indexes can be merged, deleted, and redefined so if you change your mind you can easily implement this change to the entire file.