

# Indexing 101: A Candid Look at the Birds and the Bees

By Sylvia Feldman, Optical Image Technology

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King Philip Crossed Over From Germany Slowly.

Does that ring a bell? I don't know about you, but I definitely needed a memory device to get through high school Biology. As you may recall, that particular mnemonic helps budding scientists everywhere remember their biological classification schemes: Kingdom, Phylum, Class, Order, Family, Genus, and Species. Right about now, you're probably thinking, "Ah yes. High school. What a fun trip down memory lane. But what in the world does all this have to do with enterprise content management?"

In a word, everything. Because without a relevant taxonomy, you're going to have difficulty retrieving the documents that you image, import, and save to your electronic repository. And without a good scheme for retrieval, your return on your technology investment will be diminished.

Getting back to taxonomy: let's say that I'm searching for information about a specific animal that has some key characteristics. It has wings, flies significant distances, nurtures its young, and provides a unique food source for humans (one would hope that the last characteristic would rule out bats). According to my search criteria, I might be presented with information about a number of different birds. But if the information that I'm searching for is related to honeybees, obviously my classification scheme leaves something to be desired.

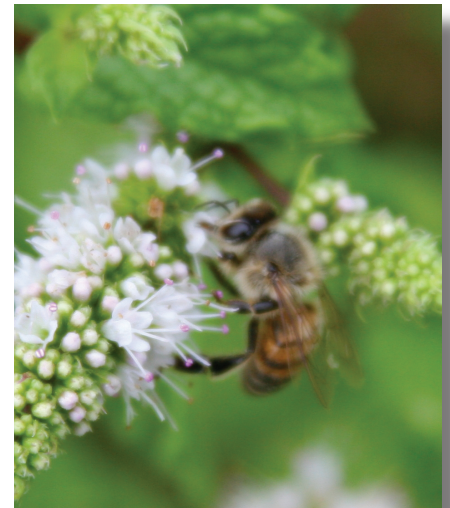
In the business world, a successful indexing strategy will result in the ability to retrieve the documents for which you are searching. It sounds simple, but it is anything but. Successful indexing involves having an understanding of not only your documents, but of your processes as well. And of the relationships that those processes have between different departments.

## Communication and collaboration

When most organizations implement ECM, they start in one department before rolling it out to other areas throughout the enterprise. Usually that department is extremely paper-intensive. Starting small is a good strategy that has the potential to significantly increase efficiency. But unfortunately, without an enterprise vision, this strategy can backfire. If an organization gears its implementation towards a specific department and doesn't expand its vision beyond that department, it can run into difficulty later when it wants to expand ECM to another area. Don't let this happen to you!

*One important resource that should not be overlooked with respect to indexing is vendor expertise. ECM vendors have seen it all—what works, what doesn't work, and everything in between. An experienced ECM vendor will offer a number of options to simplify and expedite your indexing processes.*

Prior to any implementation, you should assemble a team of users, administrators, and IT professionals so that they can map out their processes and the relationships of processes to different departments. It is critical to give your IT staff an understanding of your business processes. This needs to be a time where you can thoroughly map out the interactions



between processes, policy, and technology. Be aware that company-wide indexing is vastly different from departmental indexing. Institute a classification scheme for different levels—folders, documents, images, etc.—that is meaningful to everyone.

### Thinking strategically

After assembling a team, come up with an indexing strategy that will have relevance throughout your enterprise. This may involve:

- Identifying every type of incoming document—forms, faxes, emails, images, etc.
- Grouping documents according to the departments that process them
- Listing document metadata (type, lifespan, source, information about the document, etc.)
- Identifying the criteria that staff use to retrieve documents today (customer number, name, etc.)
- Determining how you will handle exceptions

If different departments are sharing documents, make sure that indexing structures are the same. If documents aren't being shared, it is not as vital to have the same indexing structures. You should make indexing as easy as possible for end-user buy-in. If it is quick and user-friendly, you will have a greater chance at ensuring accuracy.

### Developing an enterprise-wide indexing scheme

Bear in mind that the time you put into the planning phase of your ECM implementation will pay off in a smooth transition to paperless processing. Consider the following strategies as you determine a method to best organize and share your information:

- Map out processes as they occur today, and try to identify inefficiencies;
- Consider document preservation/destruction from the beginning, particularly if specific document types are used by more than one department;
- Be willing to compromise, collaborate, and to listen;
- Address a problem with several options for solutions;
- Consider different types of automated capture (form recognition, barcodes, etc.);
- As your plan progresses toward implementation, continually revisit end users.

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As you advance toward an enterprise-wide implementation, bear in mind that different departments will have different needs. It may not be wise (or possible) to treat them identically. Your goal is to optimize efficiency. If departments are going to be sharing documents, make sure that they have a common indexing scheme.

Frankly, the task of indexing can be excruciatingly difficult—especially if organizations have hundreds of document types. In these cases, take care not to over-index. It can be helpful to group document types that serve a similar function. Also,

consider the benefits of a system that narrows down a user's search rather than returns a direct hit. Such a system may be more efficient than the alternative. You may have to compromise between a system that is perfect and a system that is efficient.

### Investing in industry expertise

One important resource that should not be overlooked with respect to indexing is vendor expertise. ECM vendors have seen it all—what works, what doesn't work, and everything in

between. An experienced ECM vendor will offer a number of options to simplify and expedite your indexing processes.

These may include:

- Business process analysis
- On-site process evaluation
- Workflow consultation
- Conducting a document inventory
- Helping to prioritize whether work should be allocated based on date of receipt, level of urgency, or by specific deadlines

You can't overestimate the value of ECM experience. Your ECM vendor can help you to gain a solid grasp of your processes and an honest acknowledgement of your existing inefficiencies. This will give you a good starting point as you collaborate towards a successful enterprise indexing scheme.

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