Please complete a taxonomy form for each department.

**Company name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
Contact name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Contact email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

To quickly find documents and streamline core business processes we’ll start by looking at what documents your department works with and how employees search for records. This is your taxonomy. Let’s build it together by answering three questions.

**1. Select your department or core business function:**

Human Resources

Legal

Marketing

Sales

Finance

Operations

Accounting

IT

Other:

**2. What document types do you work with?**

A document type refers to the purpose of a record: like an invoice, contract, or specific form.   
Indexing or metadata are fields that help you locate the record. What information on the record makes it unique? In the case of an invoice, there’s a vendor name, invoice number, PO number, and amount.

Fill in the boxes for each type of document and the metadata to locate the document (ex. Name, Type, Date, etc.). Your metadata can be adjusted at any time.

**Tip**: Include a status field if the record goes through a process.

Examples:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Invoice | | | | |
| Vendor | Invoice # | PO # | Amount | Due Date |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Quote | | | | |
| Customer | Quote Type | Quote # | Creation Date | Expiration Date |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Forms | | | | |
| Applicant Name | Form Type | ID # | Creation Date | Expiration Date |

Fill in your document types and metadata:

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**3. How are the documents currently filed?**

You may use a file cabinet or a shared drive with lots of folders and sub-folders. Use the chart below or attach a screenshot to show us how you group and organize these records.

This helps us create the proper structure in DocuXplorer. Please use the space provided below. If you’re unable to create an example, no worries, we’ll help you design it.

Example:ABC Company / Accounting / Accounts Payable/ Vendors

\_\_\_\_\_\_\_\_\_\_\_ / \_\_\_\_\_\_\_\_\_\_\_ / \_\_\_\_\_\_\_\_\_\_\_ / \_\_\_\_\_\_\_\_\_\_\_ / \_\_\_\_\_\_\_\_\_\_\_

**What’s next?**

Standardize core business processes and automate manual tasks.

With a strong taxonomy, you’ll quickly locate any records you need. Next you can standardize, streamline, and even automate error-prone steps of your core business processes with DocuXplorer.

**Why is this important?**

By standardizing your business processes you’ll:

* Improve efficiency and accuracy
* Bring clarity to employees regarding their responsibilities
* Make training easier
* Improve consistency in your deliverables to clients and vendors
* Create measurable, reportable goals
* Review and iterate on the process
* Meet growing demands with your scalable process