

Repstor assist – how it works

Repstor assist provides suggested filing locations when using Quickfile, Quickfile attachments or when saving documents, presentations and spreadsheets from the Microsoft Office applications.

Assist works by analysing existing content found in locations where users file information and building rules to apply when users invoke new filing actions.

The process is as follows –

1. Filing locations are selected/defined (either manually by the user or using central repositories list). Only select folders where items are actually to be filed – so not locations such as work in progress folders or similar.
2. The system trains against the flagged locations and generates the rules
3. Rules are automatically kept up to date (runs in background once/day) which picks up any new locations that are added.

The rules generation can also be started manually.

Assist utilises all of the content, for email it uses the email message and metadata (e.g. to/from addresses) and any attachments when building the rules and when applying the rules to the item(s) to be filed.

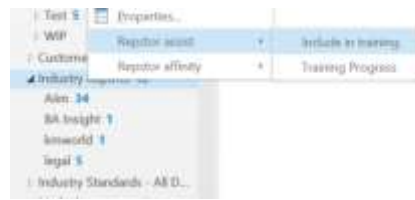
Typically where there are 5+ items that have been filed this will allow effective rules to be generated.

If the rules do not operate as expected, there is a report mechanism that can help identify issues with the existing content that is being used to generate the rules.

Low accuracy normally means that the existing content is duplicated, is not well filed or there are too few items.

Select Filing Locations manually

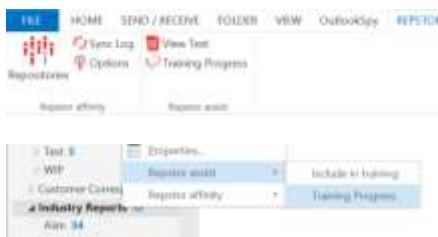
To flag a folder structure manually, right click the folder in Outlook, select Repstor assist->Include in Training.



The example above will include the Industry reports folder, and it's subfolders in the analysis and for future filing. Note – if it is already flagged a tick will appear beside the Include in Training menu item, this may be because the central repository list has the flag set to include this location in the assist training process.

Manually generate rules

Select the “Training Progress function from the Repstor assist Ribbon or the right Click Repstor assist menu.



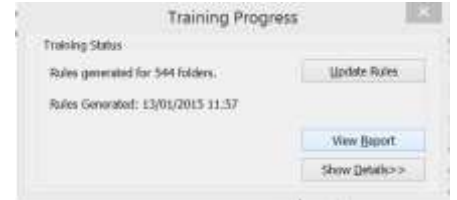
The following Dialogue is shown – this shows when the rules were last generated



Clicking on Update Rules will re-analyse the content and build a fresh set of filing rules. The dialogue can be closed and training will continue in the background. The training progress dialogue can be re-opened to view the status/progress of the training.

Report generation

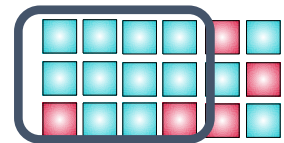
The report function generates a report that shows how well the filing rules perform against the existing content. This can only be invoked following a manual rules update.



The report may take some time to appear depending on the number of locations and amount of content being analysed

Accuracy Precision and Recall in the reports

In the reports there are three columns – Accuracy, Precision and Recall, these are classic text analysis measures for the effectiveness of rules.



Example above – if looking for all of the blue boxes and if the results of running the rules are the items within the Box, then

Precision = 83 % (10 / 12)

Recall = 77 % (10 / 13)

Precision: percentage of documents predicted to be in a topic that actually are in that topic

- True Positives / All Positives

Recall: percentage of documents in a topic that are predicted to be in that topic

- True Positives / True Positives + False Negatives
- Accuracy: This is a combination of Precision and Recall to give a single measure