



At the risk of being tediously redundant, I'm going to say it again: Keep the paper flowing to its final destination. Oops, you say there is no final destination? Well, my friends, that is what piles are made of—lost paper looking for a home.

Creating a filing system that works for you is like finding the pot of gold at the end of the rainbow. A good filing system will put you back in control, enhance your professional image and increase productivity. According to Susan Silver (*Organized To Be The Best!*, Adams Hall Publishers, 1995), when it comes to files and piles, people have three fears. Do any of these haunt you?

- **Afraid to make a decision.** If you don't know what to call a piece of paper, you'll end up calling it nothing. If it doesn't have a name, it doesn't get a home. Such orphans collect in unnamed stacks, piles, drawers and in-boxes.
- **Afraid to discard anything.** Heaven forbid you should throw anything out—you might need it someday.
- **Afraid you'll never see it again.** Filing an item in some systems is like flinging it into a black hole. If that describes your system, stacks and piles are indeed a lot safer.

The point of filing is easy placement of—and access to—information. Make it happen NOW.

Step 1: Separate "Working" from Archival Material

There are two basic types of files: **temporary (working)** and **permanent (archival)**. Determining when and how often a file will be used should tell you which type it is. Temporary files include the following:

- Action items—frequently used items requiring regular decisions and action
- Project items—Plans, notes and documents related to current projects
- Reading items—must-read materials from any source

Step 2: Label Working Files

Label action, project and reading files by purpose or function, *e.g.*, "Prospects," "Marketing," "Education." Use broad, generic headings that are meaningful to you. If the files are shared, the categories and headings must make sense to everyone involved.

Tips:

- Don't create "thin" file headings that are hard to keep track of. Use headings that cover a substantial amount of material (up to 2 inches of paper . . . box containers are great for thicker files).
- Design your system, complete with headings and subheadings, before actually creating the files.
- Use nouns for headings. Adjectives tend to get lost in memory.

Step 3: Choose Locations and Fixtures

Decide who will be using the files, when they will be used, and how much room is available for storage. Should the files be in, or close to, your desk for frequent retrieval? Should they be centrally located, accessible to several people? Is security a factor?

Choose appropriate fixtures for holding files. "Hot files" are receptacles that attach to the wall next to you and hold about 100 sheets of paper. File cabinets can be vertical, lateral or open shelf. Choose wall storage units or rolling file racks. The type of organizing fixture depends on your space and needs. Don't forget that binders work well for storing articles, newspaper clippings, reports, job descriptions, policies and procedures, and other reference materials.

Step 4: Arrange the Files

Once you have appropriate fixtures in place, decide how you want to arrange your files. Choices include:

- Alphabetically—great for client or customer name files.
- Subject—a good choice if you're using subfolders.
- Numerically—excellent for dated material, such as purchase orders and bills.
- Geographical—appropriate if you have satellite operations.
- Chronological—a good solution for back-up files that need to be set up by month.
- Tickler files—great for very detailed tasks, such as tracking bills, correspondence and reading materials. Set up tickler files by the day, month, and/or year.

Special Filing Categories

Product samples, photos and catalogs are examples of items that don't readily fit into file folders. Organizing fixtures for filing or storing such items include:

- Boxes that hold both samples and hanging file folders
- Cardboard, metal or plastic holders (great for magazines and catalogs) that sit nicely on your bookshelf
- Tubes that accommodate large, rolled-up prints or maps
- Large envelopes that hold oversized papers in the bottom of a file drawer

Permanent Files

After the project is finished or the action complete, temporary files move into the permanent file category. Moving from temporary to permanent files requires analysis and purging. Decide if items contain quality information worth keeping and storing. Are they timely? Can they be obtained elsewhere? Are they accurate and reliable (and will they continue to be so)? How will you use them in the future?

Once you decide to store a file, it is absolutely necessary to set up a *retention schedule* specifying how long the material will be kept before purging. Without a retention schedule, your office files will eventually flow into any space available, including public storage units. Maintain the retention schedule separately from the files themselves. The dates for consideration/purging should show up on your calendar (or a shared calendar) and should be the same every year so that consideration/purging becomes a habit for those involved.

Be Prepared!

Make it as easy as possible to add new files to your system. Keep a stock of labels, folders (manila and hanging), tabs and other filing materials close at hand. Be ready to quickly create a home for any lost piece of paper.

Regain control. Manage the paper. A good filing system is the key to success!