

Productive to the Max

Productivity

Performance

Profitability

Set up Proper Filing Systems

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If something were to happen to you and someone else needed to retrieve a file - would they be able to do so within 2 minutes?

The following procedures will help you establish an efficient filing process.

Develop a plan. Identify your filing needs. Keep it simple. Make it easily accessible.

Differentiate areas. Working files - for those projects you are currently involved with. Reference files - for completed projects or reference material. Archive or historical files - for completed files or information. (These should be stored out of the office or off-site if easily retrievable).

Decide on the type of system you want to use. Alphabetical (A, B, C, D,). Numerical (1,2,3,4,). Chronological (Jan, Feb, Mar, Apr).

Derive these answers. What am I using my system for? Do I have clients, projects, employees I need to track? Then the alphabetical system would work best. Do I work with deadlines and dates? Then possibly the chronological would work. Financial codes are my specialty? Then numerical systems would be the ticket. Remember that a combination of systems is ideal for many people.

Determine your categories

Most files fall into a Broadcast Category and a Subject Category. For example "FINANCIAL/RRSP"

To determine the categories, make a list of your job duties, your responsibilities and determine the categories that apply. If you have a lot of files, further sub-division of the file categories may be necessary. For example "FINANCIAL/ RRSP/ 2005."

If you are sharing files with others, for easy retrieval everyone must come to a common agreement on nomenclature.

In your filing cabinet, use separate hanging file folders with plastic tabs labeled clearly with the name of each broadcast category. Do not place any files in these separator folders. Your subject files will be located behind the Broadcast file, in hanging folders.

Discover the wonders of labels. Always use a label to increase visibility and speed. Use manual labeling for your files. This way you never have to wait to print computer files. Use the same type and size of label. PRINT! With a black marker.

Set up a supplies in a hanging file in the front of each filing cabinet. That way, you won't have to search to create new files. Put all the labels, file folders and black markers in this file.

Label each file with both the broadcast category and the subject. Label the broadcast category clearly and boldly (preferably in upper case), add a slash, then label the subject category in mixed case e.g. PAYROLL/ Sept 5, 3005. You can even use colour coding for the different categories.

Destroy those yucky folders. It is not a pretty sight to see file folders that are torn, worn and are constantly preventing the drawers from opening. Your filing system should be not only accessible but also attractive to encourage you to maintain it. Invest in the best quality of files that you can afford. It will make your filing life infinitely more pleasant.

Deal with storage. How frequently will the files be required? Use open-faced filing shelves for frequently used files. How important is protection of the files? Do you need fire and flood protection? Can the data be retrieved if lost? What kind of backup or archival system is needed? Can you archive by scanning documents? Consider file management software for records.