

How to Organize Your Paper & Electronic Files

HOW TO SORT PAPER

Follow the F.A.T System for sorting paper, notebooks, files, and binders.

- **File:** Label one of your boxes “File” and sort the following into it:
 - Keep active to-do’s close at hand
 - Move files used less often to other areas
- **Act:** Designate a box for Action items and use it for papers on which you need to do something (e.g., send an email, process a file, make a phone call, discuss with someone, etc.). This means you perform the necessary items on this piece of paper TODAY. Once you’ve completed these items, the paper should be filed, re-routed to someone else or discarded.
- **Toss:** Be brutal. Can it be retrieved again? Is it out-of-date? Does someone else have the information? Purge, purge, purge.

WHAT DOES NOT BELONG ON MY DESK

Below is a step-by-step plan for a functional desktop that will help you stay productive throughout the day. Prepare for your desk clean-up ahead of time.

1. Choose a date and enter it into your planner
2. Decide where items should be relocated. A lot of things currently on your desk may end up in the trash so begin thinking about homes for magazines, project folders, meeting notes, business cards, personal items and extra supplies, to name a few.
3. Secure a large trash bag.
4. Now the day has arrived for you to begin.

Gather like items together. A quick sort will identify the contents on the top of your desk. It is a lot easier to make decisions once you have divided everything into broad groups. Below are the types of items that you may possibly encounter while de-cluttering this valuable space:

Loose Papers

1. Decide what to toss and what to keep by glancing quickly at each document. If you stop to read each one, it will slow you down and can easily get you off track.
2. Divide the “keep” papers into two piles: active and reference. Place active documents into a file folder with similar item and keep in easy reach either on the desktop in an organizing unit that has “steps or tiers” or a close by desk drawer right next to you. Because you may not go to reference materials often, they can be kept farther away such as across the room.
3. Create a toss pile that you don’t need anymore. Recycle if possible and shred if needed. If you can get rid of a hard copy, do it and scan into an electronic file so you still have the file.

Scanning

1. Store documents electronically instead of keeping paper. First, however, devise a plan for the location of electronic files. The last thing you want to happen is to lose important documents because they were misfiled.
2. Toss or shred paper documents once a copy resides on your computer and the original is no longer needed.

Post-It Notes

1. Stash these bits of information into electronic software such as on-line post-it notes, one-note, evernote, or even the computer desktop

Reading Materials

1. Relocate them. Magazines and newspapers on top of the desk rob you of valuable real estate. It is unlikely that you are going to read a magazine as soon as it arrives. Look around your office. How about moving them to the top of the filing cabinet? Get a basket just for your weekly reading material.
2. Decide how long to keep them. Once six months have passed, recycle them, even if you have not yet read them.
3. Unsubscribe to the magazines that you hardly glance at. Be honest with yourself and let go of unread magazines that take up valuable space.
4. Tear out articles- The fastest way to go through a magazine is to glance at the table of contents and decide if there are any compelling articles. Rip them out and toss the magazine.
5. Once you are done, drop off them off in the break room in the magazine box to be shared with hospitals.
6. Recycle whenever possible.

THINGS YOU FIND ON YOUR DESK

Meeting Notes

- Decide where they should go. If they are no longer needed or are now in electronic form the answer is obvious. Consider adding them to the folder belonging to the specific project.
- Scan them to an electronic folder with a descriptive name and throw out the paper notes.
- Consider an e-notebook or tablet for real time notes!

ORGANIZE YOUR ELECTRONIC FILES

1. Make sure that the electronic filing system meets the needs of the office and that all documents have a place in the system.
2. Create a flow chart (electronic or paper) showing the type of information that will be available and the departments or people needing access to specific files.
3. Mirror your paper system using the same headings and topics as your electronic system. The more similar the two systems, the better.
4. Be consistent about naming conventions. Set up files, folders and subfolders that everyone will find meaningful and easy to understand.
5. Limit the number of clicks to three: file, folder and subfolder. There is no need to go any deeper. Note: Whatever filing name system you choose, it needs to match your needs and/or the group's needs.
6. Use a hierarchal system to organize files instead of a horizontal one. Group all projects and files relating to a particular project, person or thing together instead of using separate folders. For example, a hierarchy for a committee file folder might look like this:
 - a. File: Committees
 - b. Folder: Committee Names
 - c. Subfolder: Descriptive topic names such as agendas, minutes, committee members, etc.
7. Follow file naming conventions consistently with dates. Use the examples below to help you name your electronic files:
 - a. Agenda/Minutes
Finance Committee Minutes 2015-08-01.docx
8. Add as much information into the file name as possible so it will not be necessary to open it. Be descriptive. An example of a subfolder under communication might be: casesummarynov1115
9. If other also work on the document, add your initials at the end.
10. Avoid abbreviations and codes that are not immediately obvious to everyone.
11. Set up an index for quick reference, particularly if you use shortened versions of words such as DFT for draft or CTR for contract. Make sure that information is readily available to everyone with access to the file folders. If an abbreviation is not necessary, do not use it.
12. Delete previous revisions once document is final
13. Check the EH&S and the university records retention schedule to ensure that outdated electronic documents are disposed of when they are no longer needed.
14. Be ruthless about documents you save. The more data on the computer, the more difficult it is to find necessary documents.
15. File as you go. Do not wait until you have a long list.
16. Clean out your file folders at specific times (after a certain number, every Friday, etc.)