FILING – FAST, EASY, SIMPLE

Some Ideas on How to File

Whilst this handout focuses mainly on filing paper, much of what is suggested will apply to email/computer filing as well (with a little adaption).

1. DO LESS OF IT!

I know, I know, stating the obvious. But doing less of it is a good starting point i.e. do you really need to file that item? Much of what gets filed never gets looked at. So, when you open a letter, return from a meeting, are given something... ask yourself do I really need this? Often someone else will be responsible for keeping it, in which case you probably don't need it. Bin it.

2. CREATE A SIMPLE SYSTEM

There are incredibly complex filing systems out there, but in reality a very simple one will normally suffice. For most of us there are three types of filing:

- **Working** Things we are currently working on and need to access regularly. Ideally these items are within reach of our main working space. I often use two things for my working files. (1) Ring files for any meetings I regularly attend to keep relevant paperwork in, clearly labelled so I can instantly take it down off the shelf and take it with me to the meeting. (2) Hanging files for any other items I may need to access regularly, in an under-desk filing draw.
- **Reference** Things we are likely to refer to. Ideally this is in the same room/area we work in. These items are normally in my filing cabinet.
- **Archive** Things we need to keep but rarely look at. These can be located in a different room or even building. They can be put in archive box files, but must be clearly labelled!

For your filing cabinet, the simpler the better. Alphabetical is a good starting point. Clear labelling is vital.

And one further useful file, a bring forward file. This is a file with monthly separators in it, January to December. You place in the relevant month in a plastic wallet anything that relates to a one-off meeting/event for that month. Then when the event comes all you need is instantly to hand.

3. DECIDE THE MOST EFFECTIVE WAY FOR YOU TO FILE

There are likely to be two choices:

- **Batch it** Have one receptacle where you put everything that needs filing and once a week/fortnight do all your filing in one batch. For this to work, you must place all items instantly in the receptacle when you have stopped using them, and you must do the filing once a week/fortnight (or thereabouts) so it doesn't build up.
- **Do it as it arises** Whenever you have a piece of paper that needs to be filed, do it there and then.

People will differ in their preferences here. Just choose what works for you.

4. HAVE THE RIGHT EQUIPMENT TO HAND

If you use four hole ring binders, make sure you have a working four hole ring punch on your desk and a spare set of binders. If you use plastic wallets, have a plentiful supply to hand. If you use a filing cabinet, make sure you have spare dividers and a simple means of labelling them to hand. If you can't access the right materials instantly you won't do your filing.

5. CLEAR OUT WHATEVER SYSTEMS YOU USE AT LEAST ONCE A YEAR

In a slightly less busy time of the year, go through all your files and clear out anything you haven't used for a year, either to bin or archive. This sort of thing needs to be put in the diary otherwise it rarely gets done and your filing systems become too full and unwieldy and then you can't file anything else and the backlog grows.

6. ENJOY!

You're wondering about the fun element aren't you? Well, be creative and choose your fun. Some place a large jar of M&M's (or equivalent) on their filing cabinet and whenever they file an item have one. Others treat themselves to five minutes on a fun App that they can use when they have done their batched filing for the week, or a magazine they read. You get the idea, a treat that rewards you for fast and simple filing that brings a smile to your face when it is done.

Electronic Filing

The most helpful tip I've heard on filing is to try and use the same filing system across all your files i.e. the same folder structure for paper, email folders, on your hard drive, in Dropbox, Evernote and so on. This means when you turn to any filing you are used to the folder structure and don't have to flit between different ones.

With this system in place the principles above apply, but with one significant difference. With electronic stuff it is generally best to file it straight away. So, as soon as you have finished replying to that email that you need to keep, file it. When you have created that document for a project you are working on, file it in the relevant folder on your hard drive. When you come across that really helpful quote related to a topic you know you are going to be preaching on, file it in the relevant Evernote folder.

Emails

There is a debate on at the moment about whether to file emails at all or just leave emails in your inbox and use the search facility to find what you need. I am on the file side of the debate, but quite understand why others prefer not to.

The simplest email folder structure might be:

- **Inbox** This is where your emails enter your system. The key here is to process your emails, not check them, ideally once or twice a day. Once processed you then decide what to do with them (see below).
- **Deleted/Trash** This is where emails automatically go when deleted from your inbox. Be sure to turn off the automatic empty feature and then empty your deleted folder every six months (or whatever timescale works for you).
- **Read** Place in here anything that you might like to read but don't have time or inclination to read straight away. Then in those spaces where you have a few minutes to read you can go in here and read whatever takes your interest. Once read, the item then needs deleting or referencing.
- **Waiting** Place in here anything that requires action by another person before you can process the email completely. Be sure to check this folder at least once a week so you can chase people up if they haven't replied.
- **Reference/Kept mail** (or archive) Place in here everything you want to keep for future reference. You can either put them in subfolders (following the structure of your other filing systems) or use the search facility to find things when needed.

Further Ideas

- www.mindtools.com/pages/article/newHTE_85.htm
- www.dummies.com/home-garden/8-tips-for-organizing-your-paperwork/
- www.deskdemon.com/pages/uk/information/skills/mfile

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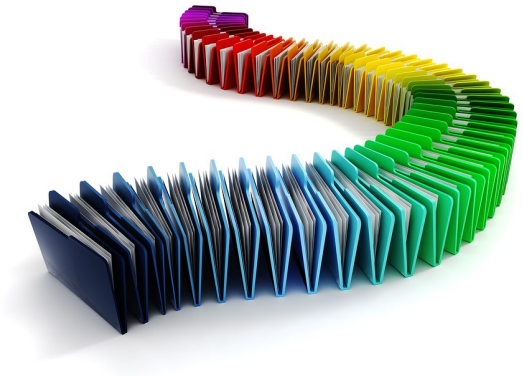

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