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Filing Systems - Organization Made Easy

By Lucy Bartlett

Are you familiar with the following scene in your office? Your haggard looking colleague muttering

to himself "Where the ***** (expletive deleted) has that paper gone?" You try to draw his attention, he doesn't respond. Ultimately he locates his paper amongst the junk accumulated by him despite his vow to get his desk cleared without fail.

Welcome to the most familiar scene in offices around the world despite high sounding TQM and other acronyms denoting efficiency in management.

An efficient filing system devised to put the documents and papers in their proper places should reduce the stress and confusion prevailing in any organization. If you have a good filing system then the efficiency of your organization increases greatly.

Are you not fast enough to classify your paper according to its content? Then it awaits its place on your table which gets cluttered with more and more papers not yet classified for their final destination. Once your table is full of these papers, you start placing the next batch of papers at whatever locations - drawers, in boxes and elsewhere

How to avoid this situation? Discard unwanted papers immediately.

If your filing system is not properly codified, you might never locate or recover the papers you are searching. Filing a fortnightly sales report in the personal file of the sales man who is making that report, will make you search for that report endlessly in various files and probably when you are in a hurry to report for the meeting to discuss sales forecast and budget.

Make placement of, and access to information easy. Separate the papers which are to be filed off from the papers which need follow-up. Create temporary files and closed files. Include in your temporary files those paper needing frequent decisions and action, documents, notes, plans related to your current project, materials from diverse sources need to be read by you.

Label your files accurately and clearly so that perusal of the title should reflect clearly the contents of the file. Create a flowchart prior to designing your file system. This will improve the efficiency of the system. Control the access to the files. Files containing sensitive information should not be placed in the common filing cabinet accessed by everybody. Use Hotfiles - to hold 100 or more sheets for your immediate working papers.

Arrange the files properly either alphabetically, numerically (for invoices or bills using continuous running numbers) or in groups of relevant divisions and sub divisions.

Find more info at

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Lucy Bartlett is a proud contributing author. Find more articles at

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3 Simple Filing Guidelines

By Maria Gracia

One of the most basic ways to find papers when you need them is to retrieve them from an effective filing system. A good filing system will allow you to find what you're looking for in 10 seconds or less.

Here are 3 simple filing guidelines that can help:

CATEGORIZING.

A filing system is only effective, if you can find everything you need, when you need it--without a struggle. And all good filing systems have different categories of papers. Your papers are either going to fall into a MAIN category, or a SUB-category.

For example, a main category might be FINANCIAL. Some sub-categories within Financial, may be: Savings Account Checking Account Money Market Account

In your filing cabinet, your main categories should always be hanging file folders with a labeled tab. Your sub-categories should be labeled manila file folders inside the appropriate main category hanging folder.

BASIC FILING SYSTEMS.

For the most part, people choose to use one, or a combination of, these basic filing systems:
Alphabetical (A, B, C, D, etc.) Numerical (1, 2, 3, 4, etc.) Chronological (Jan, Feb, Mar, Apr, etc.)

The one you use, depends on what you're using it for. For example, if you need to keep files for all of your customers (or associates, friends, etc.), alphabetical by last name usually will work best.

For sequential case numbers or projects that are numbered, a numerical system would probably work best.

If it is necessary for you to find things by date, then chronological may be your choice.

Some people get really creative and use a combination of these systems. For example, you may want your main categories to be chronological, but the sub-categories inside to be alphabetical.

LABELING.

If a file isn't labeled properly, it's not going to be quick and easy to find: Always write your subject on the tab of the file folder, close to the top of the tab, so you can easily see it when you're looking through your files. Use a medium point, black marker to label your files. Print; don't use script. Use as few words as possible on the tab.

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3 Simple Filing Guidelines

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