

How to: Filing – Alphabetical

Follow these steps to set-up the filing system after defining it meets your efficiency and efficacy needs. If you are unsure if this is the best fitting system, call Room To Breathe at (916) 444-7666 to assist you.

Step 1) Define the amount of space required to maintain the files.

Answering the following questions will help you determine the amount of filing space required. Be specific in listing out the types of files to be kept. Examples: Home Office users could access recurring bills files monthly, bank statements weekly, personal development classes files daily, past tax records annually, medical records quarterly, children’s school information daily. Business Office users could access client files daily, marketing materials files weekly, product information files daily, individual project files daily, financial and accounting files monthly.

Knowing how frequently information is accessed will identify how close or far away the information should be kept from the primary workspace. Make it easy to file the documents you touch regularly.

How much information must be kept for reference? A four-drawer filing cabinet or a two-drawer lateral filing cabinet? What types of filing cabinets are currently in the office? Don’t forget about the drawers in the desk!

What type of information is accessed daily?	
What type of information is accessed weekly?	
What type of information is accessed once a quarter?	
What type of information is accessed annually?	

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Step 2) Identify what types of information is in the files.

If there are a limited amount of documents to keep (one drawer full), then there is no need to continue with this step. If there are two or more drawers of paperwork, it may be easier to use “umbrella” categories to separate filing for ease of retrieval. For example, “umbrella” topics that frequently appear in offices are financial files, specific project files, client files, marketing files, vendor files, product information files. Separate paperwork into categories, and alphabetize within categories.

Step 3) Review documents. Purge old and out of date information. Set up files using hanging folders and tabs.

Make the files. If separating files into umbrella categories, put the different categories in different drawers. Using different colored hanging folders helps to more easily identify the different categories, however is not mandatory. Use the tabs that come with the hanging files. Tabs facilitate faster retrieval. It is faster to look at a tab, than the contents of each file. Line up all of tabs either on the left or right (justified) for easy viewing. Staggering tabs adds work when adding new files later.

Step 4) Alphabetize the files.

Shift and move files to an alphabetical order based in their labels.

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