

# Designing An Effective Filing System

By Ramona Creel

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Ramona Creel  
ramona@onlineorganizing.com

OnlineOrganizing.com <http://www.onlineorganizing.com>

I see it over and over again with my organizing clients -- they've tried to set up a filing system at home or work. And for a few days, weeks, or maybe even months, it works okay. But then something happens, and they stop filing. It's too hard to remember where things go. Or they can't find their files again once they've stashed them away. They may end up with three or four files that contain the same information but are labeled differently -- because they couldn't remember if it was called "auto" or "car" or Honda," so they just made a new file each time! Eventually, they end up abandoning the filing system altogether, and just stack their paper around the room -- "At least that way I can see it all!" If I had a nickel for every time I have witnessed this scenario, I'd be sitting on a beach in the South Pacific right now. So what causes the downfall of a filing system? Chances are, it wasn't much of a "system" to begin with. More likely, it was just a RANDOM ASSORTMENT of individual files that really had no connection to each other -- aside from the fact that they lived in the same drawer.

## KNOWING WHERE TO START

To create a truly effective filing system, you need to start with a PLAN -- simply slapping a label on a file isn't going to get you the results you want. So roll up your sleeves as I take you through a systematic and proven method for setting up a fool-proof filing system. You will need to make sure that you have a few supplies on hand before we begin. Pick up some:

- hanging file folders (your choice of letter or legal sized),
- some interior manila file folders (get the ones that sit flush with the top of the hanging file),
- some clear plastic hanging file tabs (1/5 cut), and
- at least 4 different colors of colored plastic hanging file tabs (1/5 cut -- get several packages of each).

Okay, let's get started:

## THE INVERTED PYRAMID

Organizing paper is like an inverted pyramid -- you want to start with the general and work your way toward the more specific. So let's begin this grand adventure by "broadening" your filing horizons. Look at your current filing system (or that pile of paper that you've been meaning to file for months)

and start sorting your documents into BROAD CATEGORIES. “Financial paperwork” might be one. “House stuff” could be another. At this point, we’re not focusing on detail -- quite frankly, I don’t care if it’s a credit card bill or a bank statement right now. We’ll worry about those distinctions in our next step. Have you got all of your paper sorted? And make sure to LABEL each pile with a sticky note or a piece of colored paper -- so you don’t forget your categories.

Now, for each category, create a clear hanging file tab (you know, you write on the paper label and stick it inside the plastic tab). Get your hanging file folders out -- you will need to put your hanging file tab on the front of the folder in the FAR LEFT position (just slip the wings of the tab into the slots on the file. Why the front of the folder, you ask? When your folders are in the drawer and you need to open a file, you can grab the tab and use it as a handle for opening the file. It’s easier and quicker (13%, according to the Pendaflex people) and you won’t accidentally pull the tab off. Okay, are all your tabs in place? Put your folders in the file drawer in alphabetical order, and let’s move on.

## SUBCATEGORIZING IS KEY

Pick one of your piles -- any pile -- and let’s sort through it again. This time, I want you to think about breaking your large category up into SUBCATEGORIES. For example, your “Finances” pile could be divided into “savings account,” “checking account,” “student loan,” “Visa,” etc. This is similar to the last sorting exercise, but I would like for you to be very specific about your subcategories. Don’t tell me that they are “bank statements” -- tell me which account they belong to. Don’t just call your file “credit cards” -- create a separate folder for each card. We don’t want any files “bunking” with other files -- everyone gets his or her own separate folder. Go ahead and label your piles -- but we’re going to talk a little bit more about labeling before you create tabs for these.

## LABEL, LABEL, WHO’S GOT THE LABEL?

Labeling is both a skill and an art. So you want your file labels to uniquely express how you view your files -- but you also want to follow some very basic labeling RULES. That probably sounds like a contradiction to you, but I assure you it’s not. I believe in using the whole brain -- we’re going to be both logical and creative at the same time. The creative part is where you choose the phrasing for your labels that intuitively makes the most sense to you -- like the fact that you prefer to call a file “job qualifications” rather than “resume.” The logical part involves the idea that you want your filing system to be simple enough that a three-year old can use it. We’re not trying to create a complex warren of folder that only you understand how to maneuver. Okay, enough waxing philosophic on the topic of labels -- let’s get down to it!

When creating your labels, start with a noun rather than an adjective. Don’t tell me you are filing paperwork for “past clients” -- call them “clients: past”. In this way, you are moving from general (“clients”) to specific (“past”). And when you arrange your folders alphabetically, all of the “client” files -- “clients: past” / “clients: current” / “clients: prospective” -- will be together in the drawer, rather than scattered hither and yon. Our goal is to keep related files in close proximity to each other. And the same applies to any descriptor -- “test scores: Megan)” / “test scores: Nancy” / “test scores: Shawn” -- or “maintenance records: Honda” / “maintenance records: Volvo” -- it doesn’t have to be an adjective.

Also, try to avoid vague and nebulous categories like “miscellaneous” or “other.” It may take a little effort, but 99% of the time, you can think of a specific category that encompasses that document. If you end up with a bunch of files that only have one or two pieces of paper in them, you are being too specific -- go with a broader category. But if your piles are 100 pages thick, you need to break those stacks up into smaller categories. We want to strike a nice balance -- not so many folders that you can’t remember where you put something, but not so many papers in a folder that you can’t find the specific document you need.

## COLOR ME ORGANIZED!

Now, we want to incorporate all of those subcategories into your system of alphabetized major categories. And, we're going to create a COLOR-CODED filing system, with each major category assigned its own color. Find the first folder in your file drawer -- let's pretend that your major category is "automobile" -- and gather up all of the subcategory piles that go with that header. What color do you associate with your automobile? If you don't associate it with any color, just arbitrarily pick one -- how about red? You are going to label a red plastic hanging file tab for each subcategory that relates to your automobile.

How many subcategories do you have for "automobile" -- three? Then get two hanging file folders with no label on them and put them in the drawer DIRECTLY BEHIND the one labeled "automobile." Pick up your first red tab -- perhaps this one is labeled "car payment". This tab goes on the front of the first folder in the MIDDLE of the folder -- a few slots over from the white "automobile" label. Now get your second tab -- it might be labeled "maintenance." This tab will go on the front of the second folder three slots to the right of where you put the first red tab. The third red tab ("tags and registration") goes on the front of the third folder in the far right position -- exactly opposite of where you put the white tabs. When you are done, your red tabs should be in alphabetical order in a STAGGERED position on the right of the folder, so that you can see every label clearly. Now you can put your automobile papers in their appropriate folders.

Repeat this exercise with each major category -- pick a color for the category, make your labels, and put them on the folders in alphabetical order and lined up with the first three labels. If you have more than three subcategories to label, just keep repeating the position of the tabs -- 1-2-3, 1-2-3, 1-2-3. And it doesn't matter what color you assign to what category, as long as no two categories that are touching use the same color tabs. When you are done, you should see four things. First, you have a row of major categories running down the far left side of your files. Second, you have subcategory labels staggered along the right side of your files, but all in ALIGNMENT with each other. Third, your files are now broken up into distinct bodies of information, separated out by color. And fourth, your files are alphabetized -- first by major category and then by subcategory.

## THE CARE AND FEEDING OF YOUR SYSTEM

So how does this system help you to file papers quicker and easier? Instead of opening your drawer and sorting through a sea of files to find the right one, you can put your hands on the folder you want almost instantly. You just run down the row of MAJOR CATEGORIES until you find the right one -- so if you're trying to file your Visa bill, you would look for "credit cards" or "finances" or something like that. Once you've located the right major category, you just slide over to the appropriate color-coded SUBCATEGORIES. Instead of choosing one of 300 files, you may only have to look through three or four before you find the one that is labeled "Visa." And the same is true when you are trying to find a document in a file. You can make things even easier if you create a file index that lists all of your major categories and the subcategories within them, in alphabetical order. That way, you don't even have to open the drawer to know where to find a piece of paper.

But remember that your filing system is a dynamic and ever-changing creature. As your interests and responsibilities change, so should your filing system. Don't be afraid to abandon a category if you don't use it anymore -- or to add a new one if you need it. Consolidate folders that seem to go together under one larger heading, and split categories up into smaller pieces if your folders get too stuffed. And you should plan to set aside time at least once a year to purge the old and obsolete information from your files. If you follow these simple (but detailed!) instructions, your filing system will serve you well for the rest of your life.

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