

Organizing Electronic Files



Organizing electronic files is important because much of the information we handle these days has become electronic. Even though the paperless office is still a long way off, setting up a system for organizing electronic files is very important. Unfortunately, few people have a system in place for non-paper items and it all becomes virtual clutter. However, organizing electronic files isn't as complicated as it seems. It's easy to set up an organizing system on your computer with just a few simple steps.

Mirror Your Paper Files

With paper files, the rule is to start with a broad category that you can break into sub-categories – the same is true when organizing electronic files. If you engage in online banking and bill-pay, set up a main folder called “Finances” – then create sub-folders for each account's statements.

If you have a business, you can pull up customer information in seconds if you have a main folder called “Clients”, sub-folders for each, then individual files for billing statements, project notes, and email communications. It's that easy!

Create A Naming Convention

When you store multiple drafts of the same document, a clear way of naming files will tell you which version you are looking at. Instead of calling the file “Johnson_Proposal”, name it “Johnson_Proposal_6-8-08”, signifying the date of the last edit. If several people are working on the same document, include a name or initials at the end so you know who made those updates – “Johnson_Proposal_6-8-08_RFC”. As an added bonus, your files will be in alphabetical, then numeric order when you search for them.

Avoid The Urge To Print

Many people defeat the whole idea of “paperless” by automatically printing every email, memo, and electronic document they receive. If you don't have a good reason for printing it out, save it on your computer and refer back to it electronically.

Clean Out Regularly

Just like paper files, it's easy for electronic folders to become overstuffed. Once or twice a year, go through your computer files and purge anything that has become outdated, obsolete, or irrelevant to your life. And ask yourself “why” before you save it – especially with email. You don't need to keep every email notice and solicitation – just save those emails that you will refer back to in the future.

Back Up Regularly

It goes without saying that when you store important information on your computer, you need a back up. At least once a week, save all of your files to an external hard drive, disk, or online backup service. Don't forget the files in your contact manager, bookkeeping program, and any other software you use regularly! This way, if your computer crashes or something happens to your physical equipment, you always have a copy to fall back on.

By: Ramona Creel, Professional Organizer

