Strategies for Tracking Files

A well-designed filing system keeps office workers productive by allowing them to find information quickly. Users know exactly where documents belong, and finding them in the system is easy. But what about a record that has been removed from the filing area? Perhaps someone else is using the file, or maybe it was moved from active records to archive storage. Or has it been misplaced or lost?

Out Guides: Simple, but Effective

The easiest way to keep track of folders removed from the filing system is to use Out Guides. Whenever a folder is taken, and out guide is put in its place. Like a bookmark, an out guide makes it easy to spot which files are in use. A red tab with the word OUT on it is easy to see among the folders. Out guides have a place for users to mark their name, and the date that they plan to return the folder to the filing system.

Out guides also reduce the time it takes to replace folders to their correct location among the others. Misfiled folders are greatly reduced because the out guide clearly marks the correct location in the drawer or on the shelf.

Bar Codes Make it Easy to Manage File Activity

Large filing systems that have many users can take advantage of bar code technology to keep track of files throughout their life cycle. A bar code is printed on the label in addition to the color-coding and readable text. Handheld scanners read the bar code when it is removed from the filing system, capturing the file name along with the time and date. The file is then assigned to a user or a location, and an expected return date is indicated.

Tracking software makes it easy to quickly determine which files are being used, and who has them. Electronic requests can be sent to the users if someone else needs the file, or to remind them to return it to the filing system. The software also allows you to set up retention schedules for each file so they can be removed from the active filing area when they are no longer needed.

Whether you choose out guides or bar code tracking, keeping track of folders in use is an essential part of any filing

system that will save time and reduce stress among office workers.