Pennsylvania
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Tips for Maintaining Files

Technology has made it easier to store information electronically, yet it hasn't significantly reduced the amount of paper we handle regularly. Whether you have paper or electronic records, setting up an efficient filing system, purging old documents, and knowing where your records are stored will make finding the information you need when you need it easier.

- Comply with approved Records Retention and Disposition Schedules
  Note: All records should be maintained, managed and disposed of in accordance with a Commonwealth-approved schedule.
- Implement a fiscal or calendar year cut-off.
- Dispose of non-records
- Create new folders when they have reached their capacity (75 sheets)
- File at least fifteen (15) minutes every day.
- Where applicable, appoint one person to be held accountable for the files in your office. This person will have the authority to control the access and use of the files.
- Identify and protect vital records.
- Label your file cabinet drawers with the records series title(s) and schedule item number(s). Also, label your file folders.
- Maintain in front of your filing cabinet an STD-57, Records Inventory and Analysis Form, for each record series; or, you can retain a File Plan.

4. Nest folders within folders.
Create other folders within these main folders as need arises. For instance, a folder called "Invoices" might contain folders called "2004", "2005" and "2006". A folder named for a client might include the folders "customerdata" and "correspondence". The goal is to have every file in a folder rather than having a bunch of orphan files listed.

5. Follow the file naming conventions.
Do not use spaces in file names, keep file names under 27 characters, and use all lower case. So a file named for a client should be jackdawson rather than Jack Dawson. If you break any of these rules, be consistent about it.

6. Be specific.
Give files logical, specific names and include dates in file names if possible. The goal when naming files is to be able to tell what the file is about without having to open it and look. So if the document is a letter to a customer reminding him that payment is overdue, call it something like "overdue081206" rather than something like "letter". How will you know who the letter is to without opening it? See the next point.

7. File as you go.
The best time to file a document is when you first create it. So get in the habit of using the "Save As" dialogue box to file your document as well as name it, putting it in the right place in the first place.

8. Order your files for your convenience.
If there are folders or files that you use a lot, force them to the top of the file list by renaming them with a ! or an AA at the beginning of the file name.

9. Cull your files regularly.
Sometimes what's old is obvious as in the example of the folder named "Invoices" above. If it's not, keep your folders uncluttered by clearing out the old files. Do NOT delete business related files unless you are absolutely certain that you will never need the file again. Instead, in your main collection of folders in My Documents, create a folder called "Old" or "Inactive" and move old files into it when you come across them.

10. Back up your files regularly.
Whether you're copying your files onto another drive or onto tape, it's important to set up and follow a regular back up regimen. See The 3 Steps to a Successful Backup System for more information.

The search function is a wonderful thing but it will never match the ease of being able to go directly to a folder or file. If you follow these file management tips consistently, even if you don't know where something is, you know where it should be – a huge advantage when it comes to finding what you're looking for.