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# How to Organize Your Computer Documents

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By K.J. McCorry



Creating Workplace Efficiency.

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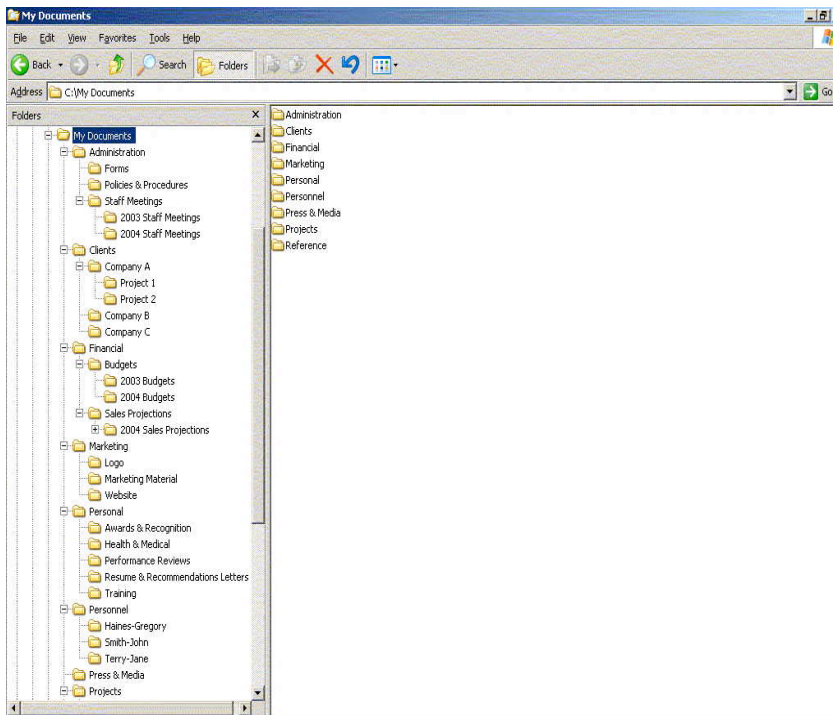
## Introduction

The average worker now loses over two hours looking for misplaced documents and emails on their computer and over 95% of the data received is in electronic form. Creating a paperless office can be a difficult challenge when your electronic directory is not organized and you don't trust your electronic filing system. Here is information on how to create an organized system of managing your electronic documents to improve data efficiency.

## Creating an Electronic File Structure

Some electronic files are stored in an organizing structure that has virtually no rhyme or reason. Sometimes electronic documents are stored under a single file folder, which is similar to storing all paper office documents in one file cabinet drawer, with no hanging files or Manila folders to categorize them. Stashing all your documents within a single folder makes access time-consuming.

It is best to create an electronic file hierarchy structure that is parallel to your email and/or paper file structures. This keeps data organized under one structure instead of trying to maintain multiple structures.



*An example of a file hierarchy structure in Windows Explorer.*

## Choosing a Storage Location

Before creating your electronic filing structure, you need to determine where you want to store your electronic data files on your computer. If you work in a company on a networked system, most likely your IT department gave you a personal file folder or drive space on the server that usually is named your first initial and last name. This might be the best location to store your electronic data because the server systems are usually backed up nightly. Some individuals prefer to keep their documents on their hard drive, or C drive, and not on the network server because they find it is easier to access and more reliable, especially when traveling. If you select this option, be sure to determine a backup plan.

It's best to set up your file structure within one master folder; this makes backing up and moving stored files easier. If you choose to store your data on the C drive, you might want to use the existing folder called [My Documents](#) to hold your electronic data. If you choose to store documents on the network or a different drive, you might have to create a new folder called Data or My Documents to begin your electronic file structure.

## Organizing Your Files

Create your electronic file hierarchy system first, before you begin to reorganize the electronic documents you want to file within it. With your system in place, you easily can drag and drop files into the appropriate file folders, without stopping to create a new file folder.

### Step 1: Open up the File Manager

If you're working on a PC, you can use the standard [Windows Explorer](#) program to organize files. Select Start, All Programs, Accessories, Windows Explorer to open the program. Or for a quick shortcut, you could right-click the Start button and select Explore to open Windows Explorer. For Mac-based systems, just click the Mac Drive icon on your desktop.

### Step 2: Create a Folder View

Once in Windows Explorer, click on the Folders icon in the toolbar. This view simplifies organizing electronic files and makes it easy to drag and drop files and documents from one pane into another. In this double pane column view, the left side lists all primary files and drives and the right side lists the contents of a highlighted folder. For the Mac-based systems click in the view that offers multiple columns.

### Step 3: Creating File Folders

Electronic file folders are designed and viewed in an outline structure sorted in alphabetical order. To create a new file folder in Windows Explorer, highlight the file or drive in which you want to create

the new folder (such as 'My Documents' or 'Data'). In the toolbar, choose File, New, Folder. Initially the file folder is named New Folder and the name is highlighted; type in the new file name to change the name of the folder. If you accidentally click out of the new file before you have typed in your file name, just right-click on the new folder and choose Rename from the context menu.

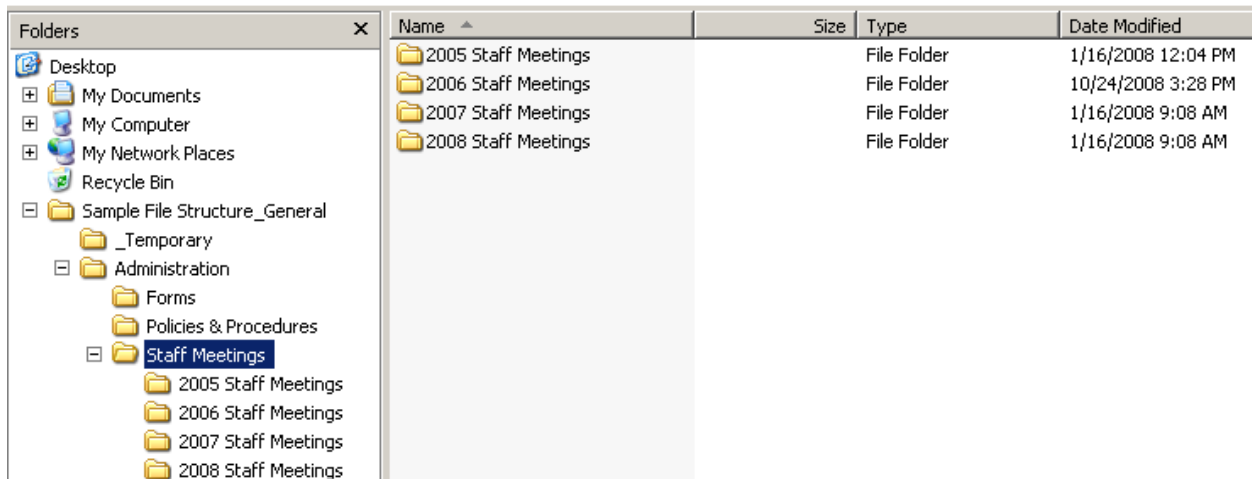
#### Step 4: Move Files and Documents

To move files into folders, merely click and drag the document into the file folder. Within your file system you can create multiple layers of sub-files. Try to stay within 5-6 levels to keep simplicity and ease of use with your system.

### Creating Subcategories for Your Documents

When a folder has more than 30 documents in it or over a screen view length, consider subcategorizing the folder contents by creating subfolders. For example, if you have a file folder titled Staff Meetings with more than 50 documents of meeting minutes for the past four years, create chronological subfolders by year and store each year's minutes in the appropriate subfolder. This subcategorization simplifies the process of finding meeting minutes from the current year. It also makes it easier to purge older minutes.

Create the subfolders using the same process you used to create the master folders. Begin by highlighting the file folder within which you want to create the subfolder. For Mac users, you must first open the folder window to create subfolders.



*An example of developing subcategories.*

## Developing Standard Naming Conventions

Choosing standard naming conventions for your filing system will help you name, file, and locate your electronic documents. Some categories of paper files always have a standard coding, such as personnel files that are labeled with last name, first name and (possibly) Employee ID number.

Creating standard file names for your electronic documents is similar to using standard file names for your paper files. To create standard naming conventions, consider the data that should always be entered in first, then the next set of data, and then the next.

For example, if naming a financial report you may consider the following:

**04-01-2005\_Balance Sheet\_ABC Company (date\_type of report\_name of company)**

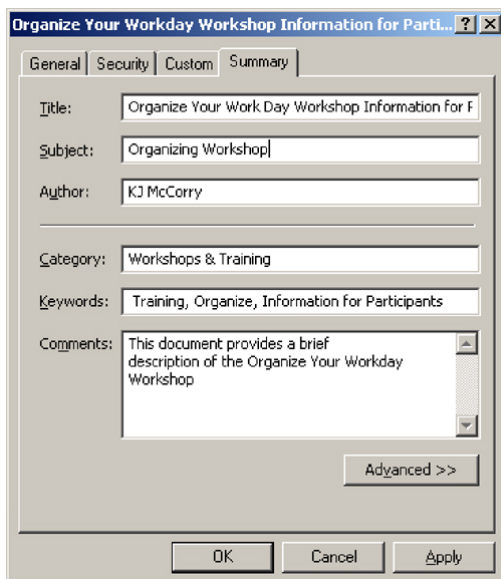


*A sample of creating standard naming conventions.*

## Adding Metadata

Metadata is data describing context, content and structure of documents. With each document you can add-in 'metadata' which includes words and properties to a document to help search for it in the future.

In Windows Explorer, you can add in metadata by either going to File/ Properties or right click on the document and choose properties. Click on the Summary tab and insert the data. If you click on 'Advanced' you will see other fields and properties relating to that particular document.



*A view of the Summary window to enter in metadata for documents.*

## File Organization Software

Here is a list of some specific software that can help with file organization. Most of these programs function very similarly to Windows Explorer. Although you needn't use file management software to create or organize your electronic files, those programs typically offer additional functionality you might find useful in organizing and maintaining your electronic records.

**Universal Explorer:** This PC software actually replaces Windows Explorer as your file manager. It offers the capability to view documents without opening them and to compress documents into .zip files.

**FileQuest:** This PC software enables you to view file folders in multiple panes, thus making viewing and organizing files and documents easier.

**PowerDesk:** This PC software offers the feel and look of Windows Explorer but provides the capability to simultaneously search over multiple drives. You can also compress files and enable password protection, if desired.

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## About K.J. McCorry

**K.J. McCorry** is the owner of **Officiency Enterprises, Inc.**, a productivity, efficiency and sustainable consulting company based out of Boulder, CO. Ms. McCorry is the author of *Organize Your Work Day In No Time* (Que Publishing), a recommended book for certification of the professional organizing industry.

She is considered a nationally recognized expert and has been featured in *The New York Times*, *International Herald Tribune*, *Chicago Tribune*, *Real Simple*, *CNN Money*, *Better Homes & Gardens*, and has made appearances on TV and radio on the *Do It Yourself Network*, *The Peter Boyles Show*, and *World Talk Radio*.

She has been a contributing writer on productivity for the *Boulder County Business Report* since 2002 and has been twice nominated for the prestigious Founders Award by the **National Association of Professional Organizers**.

Ms. McCorry received her BA in Psychology and International Business from Metropolitan State College in Denver, Colorado and her Masters in Business from the University of Denver. She can be reached at [info@officiencyenterprises.com](mailto:info@officiencyenterprises.com).

