

Digital Directions: Organize Your PC Files

By Richard Ensmann, Photo Lab Management Magazine, January 2000

ONE MORNING you go to retrieve a PC file and you suddenly realize that you have hundreds - or thousands - of files arranged on your hard drive in mish-mash fashion. If so, your drive is evidence to the mistaken belief that once you save a file you can locate it instantly. The reality is, like paper files, computer files can easily become disorganized.

Use the following tips to help you organize the documents you store on your, computer, and minimize the time you spend on retrieval:

- Think of your primary drive (probably your C:\ drive) as a file cabinet. Just as a file cabinet is divided into sections and folders, your drive is divided into directories and subdirectories (often termed “folders” and “sub-folders”). When you move from a directory to a file by means of a computer command, you're following a data path. This is analogous to opening a file cabinet and searching for a particular piece of paper. Understand the pictorial analogy here and you'll take the first step toward organizing your computer files.
- Set your default directory. If you save the great majority of your files to a single folder, make this folder your default. But remember: you should still check to be sure it's set properly each time you prepare to press the "save" button.
- Understand the mechanics. The majority of computer users today are Windows 95/98 personal computers users. To create folders in Word, you simply click the “new folder” icon when saving a new file on your menu bar and, viola, it's done.

To create new files you use the “save as” command, but you must be certain that you instruct your system to save them in the right folders. Prepare a piece of correspondence to a customer, for instance, and you might want to save this in your "customer" folder.

- Organize your directories and subdirectories logically. Look at your real file cabinet. Do you have a section for employee files? A section for product files? A file for customers? Whatever major categories you include in your regular filing system, include them on your PC. This will enable you to move back and forth from paper to computer files with a minimum of effort.
- Determine the sequence of your files. If one of your files, or folders, includes customer correspondence, you might use an alphabetical sequence. On the other hand, if you manage all your customer correspondence by account number, you might use a numerical sequence
- Use standard naming conventions. Computers, while remarkably fast and adaptable, can be unforgiving when you attempt to call up files using file extensions they don't recognize, for example.

Let's return once again to the computer analogy. If you arrange your customer files in alphabetical order, the name each file will begin with the name of each customer. But what happens when you have multiple documents for a certain customer? You might simply place the term “ltr” in the file name as a suffix to indicate that the document is a letter. Or if you write a lot of proposals, you might insert the term “prp” within the file name of a proposal to indicate the name of the document.

Remember to use naming conventions that are consistent and easy to remember. Computer searches in the future will, in any case, be easier, as technology allows you to search on a portion of a file name instead of the entire name.

- Maintain naming consistency with your paper files. Ideally the names of your computer files will be exactly the same as your paper files. The result: you'll be able to move back and forth between the two effortlessly.
- Add additional suffixes to simplify your file searches. If you generate a large volume of correspondence (resulting in lengthy searches), add another feature to your suffixes to further specify each document. For

example, if you generate lots of proposals to customers, you might include a date in the suffix. A file name for John Smith, who received one of your proposals in April 1999, might read: "SmithJ P9904.doc".

- Create specialized directories for specific files. If you download articles or games for casual use later on, you might create a "Download/Articles" and/or "Download/Games" folder. The guiding principle here is that each class and sub-class of document or file belongs in its own folder.
- Be careful of overwriting. When it comes time to create a new draft of a document be sure you locate the original document properly. Don't create a second document; if you do, you'll inevitably get the first and second mixed up at some point. Conversely, if it is necessary to create and save multiple versions of a single document, be sure you note the appropriate document sequence, such as SmithJ P9904 (1).doc , SmithJ P9904 (2).doc, SmithJ P9904 (3).doc, etc.
- Use temporary folders for temporary materials. Rather than turn these into permanent files that clutter your hard drive, consider creating a single "temp" folder. Delete the contents every week. Or create a "temp" file that can be over written with new material. For example, create a "today" folder, bearing the file names "Monday," "Tuesday," "Wednesday," "Thursday" and "Friday." Create your temporary correspondence for the day here, and print it out at the end of the day. When next Monday rolls around, simply delete the old "Monday" material and use the file for that day's temporary material, and then do the same for each successive day of the week.
- Be sure your naming conventions and filing systems are consistent from machine to machine. Do you create files on your home computer and bring them to the office via diskette or e-mail? Do you generate correspondence or spreadsheets on a laptop and transfer them to your primary computer later on? If so, avoid confusion by maintaining the same filing hierarchy on each computer.
- When you're stuck, perform a global search. In Windows 95 or Windows 98, use the "find" option on the "start" menu. In Windows 3.1, use the "search" command in the File Manager. This step, remember, takes longer than a typical file search. And in any event, it won't be successful if you don't remember some portion of the file name - another reason to use logical, standard naming conventions.
- Perform regular maintenance. On some periodic basis recycle or delete files that you no longer need. These files can include routine correspondence (especially if you saved paper copies), downloaded materials for reading, and miscellaneous documents that others have sent you. Good maintenance also means performing regular backups to an external drive. If backing up your entire system is too time-consuming, be sure you at least back up important directories and software, preferably each day.
- Record the file name on all documents. At the footer of every document, include the directory and file name. The result: you have a handy reference on every sheet of paper, allowing you to easily retrieve the file from you system at any time.
- Publish you filing system. Just as you might have a list of your paper files, you should develop one for your computer files. Once you have these lists, you and your co-workers can easily find items in a pinch.

Remember, too, that hypertext, once the exclusive province of the World Wide Web, is now making its way into the world of personal computers. With little effort, you'll soon be able to turn your computer into a powerful hypertext-based filing system, allowing you to quickly retrieve related material on any topic fast and easily.

Like paper filing, electronic filing is very much a mixture of sound planning and common sense. Take some time to review your filing practices and needs, and you'll find yourself using your computer system as an ever-more efficient storage and record-keeping tool.