BEST PRACTICES FOR ORGANIZING COMPUTER FILES

TRINITY WORLDWIDE TECHNOLOGIES, LLC

Every time you dig around for a document you are not as productive as you could be. So, don't sacrifice your precious time searching and clicking for a document.

It's time to get organized!

Here are some best practices for creating and keeping an organized file structure:

1. **Create an organized filing structure:**

   a. **Userdata**: The highest level of the filing structure. (figure a.)
      - **Apps** – installable software
      - **Data** – databases, forms, scans
      - **Dept** – functional areas of organization
      - **Personal** – the My Documents folder for each employee. A place where employees can save their own "personal" files. (figure b.)
      - **Scratch** – temporary holding place for sharing files (instead of emailing them to each other) or any that are temporary. The files in this directory should be deleted at least weekly.

   b. **Use a hierarchical structure (subfolders) to organize folders (figure c.)**
      Subfolders help create logical groups within your larger categories. For example, within a client folder, you might have separate subfolder for each project. Then within the project, you may have further subfolders for correspondence and contracts.
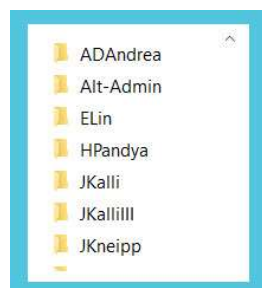
   c. **Use a descriptive name for Files and Folders**
      Work-related files should be classified by **Department or Function** (figure d.)
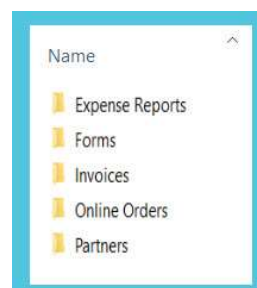   If you are storing files that contain a date, use *yyyy-mm-dd filename* so they sort in order. Example: 2020-09-10 my file.docx
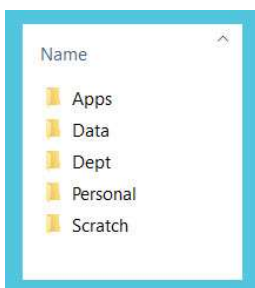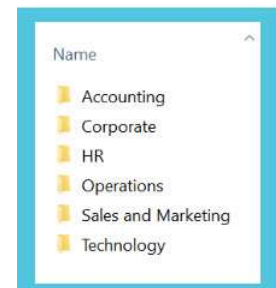

a. UserData

b. Personal Files

c. Subfolders

d. Department or Function

2. **Schedule Maintenance**: Pick a time to each week to tidy up!
   a. Look through the files you have worked on this week and make sure they are in the right place.
   b. Delete unnecessary, duplicated files.

3. *Clear off your Desktop*: *(This is the #1 bad habit for many)*
   a. Saving files to your Desktop provides immediate access but can quickly turn your Desktop into a cluttered mess.
   b. Having a cluttered Desktop slows down the login process.

4. **Clean up Downloads:**
   a. Don't let downloaded files sit in your *Downloads* folder. Either file them away or delete them.

5. **File things immediately –** (*This should be number the number one piece of advice*)

   "Don't put off until tomorrow what you can do today**." Benjamin Franklin**

We hope you find this educational piece helpful in guiding you through creating an optimal file structure that allows your staff to work efficiently. An organized system makes working less frustrating. If you know where a file is stored, you will not be stressed out when you need to quickly find it!

Please let us know if you have any questions about your IT environment or any topic including creating, using, or moving your file systems to the cloud. We are here for you!

The most important point to remember about creating and maintaining an organized file structure is that you and your staff need to stick with it!

Trinity Worldwide Technologies, LLC
Tel: 732-780-8615
sales@trinityww.com

TRINITY
WORLDWIDE

Microsoft Partner