How to Simplify Your Filing System; or, Why Stacking Just Doesn't Work

Does your filing system include stacks of paper, or is your "To Be Filed" folder overflowing?

If you have trouble with filing your documents, you may need to find a way to simplify your filing system to keep yourself organized.

Filing is something many people have a problem with — you're not alone. But organization can not only make you more productive, it can simplify your life and make it less stressful.

Being organized doesn't take a complicated system for filing. It simply requires that you have a place for everything, and get into the habit of things where they belong write away.

Whether you've got a complicated filing system you'd like to simplify, or whether you have no filing system at all, let's take a look at how to simplify the system and keep things perfectly organized.

1. Reduce before organizing. The first rule to organizing is that you should eliminate the unnecessary before organizing at all. If you've got a filing drawer that's overflowing, or stacks of paper that need filing, it'll take forever to organize — and even then, it'll be hard to find stuff.

Here's how to simplify your papers and files before you organize:

1. **Put everything in one big pile**. If it can't all go in one pile, make more than one, but look at them as continuations of the first pile. If you have folders that are a mess, take them out and add them to the stack. I recently did this with my home filing system and reduced the files by two thirds. It took about an hour.
2. **Go through them, one at a time**. Pick up each document or folder and decide what needs to be done with them. If you can't see yourself needing it in a couple of months, toss it. Default to toss (or shred, or recycle). Get rid of as much as you can. I've never regretted tossing a document.
3. **Route**. If you can't toss something, try to route it to someone else. Get it off your desk.
4. **File**. If a document is absolutely critical, and you're sure you'll need it again, then it needs to be filed. Let's take a look at how to set up a simple system for doing that.

2. Simple filing. I agree with David Allen's [Getting Things Done](), which recommends that you use a simple, alphabetical filing system. Just use plain manila folders with labels (you can buy a label maker if you like), creating a file for each client, vendor and/or project.

I believe that most people only need one drawer for filing. Now, I'll admit that there are some jobs that require

much more than this, but for the average employee (or self-employed person), one drawer is all you need. And if you limit yourself to one drawer, you force yourself to toss out unnecessary files when the drawer gets full.

Don't overthink this. Just create a file, and file it alphabetically. Keep it simple.

3. File immediately. The key to keeping your filing system up to date is to file things right away. When you're processing your inbox, and you run across something that doesn't require action but that you might need to file later, don't put it in a pile to be filed later. Don't put it in a folder labeled "To File" or "Miscellaneous".

Just open your filing drawer (it should be close on hand), pull out the appropriate folder, put the document in it, and file it. That takes about 5 seconds, and then you're done. If you don't do it now, it will start to pile up, and stacking just doesn't work.

Why stacking doesn't work: Because it just piles up and then the pile gets a little intimidating and then before you know it you've got a huge pile that you never want to go through. Then you can't find anything when you need it, and now you no longer have a filing system. I know some people think that their piles are organized into a kind of system, but piles are inefficient (if you're not working on them at this moment) because you constantly have to re-factor what pile is for what and which documents are in each pile, and when you need a document, it takes too long to find it. Plus, it clutters up your desk, distracting you from your work.

4. Have materials on hand. Always have a big supply of manila folders and labels on hand. If you have a document that needs to be filed for future reference, but no file exists for it yet, you will put the filing off until later if you don't have the materials on hand. You don't feel like getting up to get a manila folder or label every time you need to file something, so you'll put it off. And that will create piles.

So instead, just have the materials in a drawer, for easy access. When you need to make a new file, just put a label on, stick the document in, and file it alphabetically.

5. Reduce your needs over time. Over the last year or so, I've consciously been reducing my filing needs so that I now barely use my filing drawer. Sure, at least once a week I'll pull open the drawer to look at a file, but I file many fewer documents than I used to. I recommend that you do the same, slowly and consciously reducing your filing needs. Here are a few tips for doing that:

- **Store reference information online**. Now when I need to look something up, I press a hotkey combination (I use AutoHotkey to open websites and documents) and the appropriate document opens up with all the info I need. Contacts, budget information, ideas, logs, and much more are all online, so I no longer need hard copies of them and don't need to file them.
- **Reduce incoming paper**. Ask people to email you instead of faxing or sending a document by post. In this age, everything is created on computer, and sending hard copies is outdated. Insist on digital. Also take steps to stop paper versions of newsletters, magazines and other such regular documents.
- **Stop printing stuff**. Lots of people still print out email or documents they receive, or even documents they create themselves. But then you have two copies of it, you're killing trees, and you now have to file the paper version as well as the digital. And it's much easier to search for digital information when you need it.
- **Analyze other incoming docs**. Every time you file something, ask yourself if you really need a hard copy version of it. Is it available online? Does it really need to be sent to you? Is it better to scan it and store it digitally? Is there any way to eliminate the need for this document? And slowly, one by one, reduce your need for all the incoming stuff.