

IMPROVE YOUR WORKFLOW: Organizing Electronic Workspaces

Purpose: Our electronic workspaces quickly become unwieldy when we have multiple copies of the same documents, or when everyone has their own way of labeling and storing files. This document is intended to provide tips to organize electronic workspaces so it is easier to quickly find what you are looking for, know which version of a document to use, and keep your workflow going.

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Organizing electronic documents

The most important thing is to consistently file documents in a way that *works for you and your team*. If you are using a shared drive, everyone should know the system and agree to use it. Here is a system with three levels of folders.



Primary Categories



Middle Categories



Final Categories

- Start with a top-level folder, like all the documents for one program. Then create subfolders inside the top folder for each kind or purpose of document for the program.
- Create top level folders that make sense for your work. They can be named by funder, program, type of program, work area (administrative, branding, programming, etc.), user (supervisors, clinicians, etc.) and so on.
- You can use the “maximum of 11 items” rule to determine if you need another 2nd-level subfolder, or if you have reached the end.
- Subfolders are good, even if there are more than 11! It is much easier to find a file by topic, than to read through a long list of unsorted files.
- If using a shared drive, give the folders names that everyone would understand.
- Now you can organize the files inside the 2nd-level folders by using a file naming system (see below). Depending how you name files, they will be sorted in the folder alphabetically or numerically.
- You may want to add folders by date in this category. Example: if you have 50 documents containing meeting minutes from the past 3 years, you may want to divide them by Year and then Month.

Organizing with File Names

One of the best ways to make files easy to find is to ensure everyone uses the same file naming conventions when they create files. File naming systems can help you know what’s in a file just by its name and can help you group files in a list that are related to each other. Some examples to consider:

Example Names

ET.process.imp.elec.workspaces.20190429.doc

Example file name for this emPower Tool (ET) on Process Improvement (process.imp) for Organizing Electronic Workspaces (elec.workspaces) and date it was last updated (2020-04-29)

2019_BSK_Annual_Report.doc

Year > Funder > Document Name

Order it will appear in the folder

ET.data.culture.data.training.20200402.doc
ET.process.imp.elec.workspaces.20190429.doc
ET.productivity.collaboration.20190326.doc

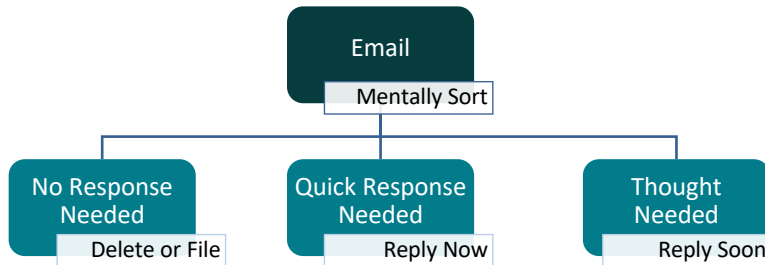
2019_BSK_Annual_Report.doc
2019_HVSA_Annual_Report.doc
2020_BSK_Annual_Report.doc

- ✓ By default, **files inside folders are sorted in alphabetical order**. You can use this to your advantage in file naming. (Note: you can also set a folder to sort files by creation date, modification date, and other options.)
- ✓ To **group files together around a topic**, use the same word at the beginning of the file name. If you want files to sort in date order, put the date at the beginning of the file name.
- ✓ **Include your organization and program name** if you will be sharing the file outside of the org/program:
- ✓ **Words are easier to read if you separate them** with periods (.), underscores (_) or dashes (-), or use Camel Case (FirstLetterCapitalized). Some software programs do not accept spaces between letters in file names.
- ✓ **Abbreviations** are great—as long as everyone knows what they mean (for example Q4=4th quarter)
- ✓ **Make sure every file has a descriptive name that is unique and aligns with your naming conventions.**

Organizing Email

🕒 Categorize Emails for Response

Open your inbox, and mentally sort emails into three categories:



🗑️ **No Response Needed**

Don't let it clutter your bandwidth:

- If you need to keep the info, file email in an inbox folder
- To keep the info on hand, flag it, create a special inbox folder, or color tag it (so you can search by color!)
- If the email includes a task, add task to your "to do" list then file email.

🕒 **Quick Response**

Don't let it linger in your bandwidth:

- Reply right away as much as possible
- When people know they can count on hearing back from you quickly, they are less likely to send repeat emails

📅 **Thought Needed**

Give it dedicated bandwidth:

- If you need to follow-up on other items in order to respond to the email, add those items to your "to do" list
- Organize emails into folders based on when you will follow-up (build in your deadline)

📁 Use Folders to Categorize & Store

It's hard to find emails in a crowded inbox.

Create inbox folders to find emails quickly!

- **Most saved emails will serve as an archive**, so you don't need to limit the contents of an inbox folder to 11 emails. It's better to minimize the number of archive folders.
- **'Thought needed' emails** should be organized into three folders. These serve as your important "To Do" folders:

- Today (should be small)
- This week
- This month

Mark time in your calendar to follow up on these emails. **Add follow-up tasks to your to-do list.** After responding, delete or organize email into appropriate archive folder.

- **Frequently referenced informational emails** can be put in their own folder or flagged for easy access.
- **Don't be afraid to delete emails!** 'No Response' emails should be deleted/flagged into inbox folders immediately. Do the same with 'Quick Response' messages, right after responding.

- ✓ **Start a new email thread if your email is covering a new topic.** You do want to minimize email threads, but information will be difficult to find if you have several topics discussed in a single thread.
- ✓ **It's a must to keeping up with email organization!** Inboxes become unruly quickly, so make sure to build time for this into your schedule (see the *Improve Your Workflow: Communication Tips and Tools* emPower Tool).

Shared Documents

There are two primary ways of using and working on documents with a team:

Simultaneous viewing

Platforms such as Google Drive and Dropbox allow more than one person to view and edit the document so you can work simultaneously. See *Improve Your Workflow: Collaboration Tips and Tools* emPower Tool for more on this.

Shared access

On a shared drive, be sure to save latest edits with today's date (see above). Two people should not work simultaneously on same file.

Note: limit sending documents for editing whenever possible! You can **email the link to the document** to avoid using old files.

Shortcuts and Bookmarks

Bookmark web addresses you use often: if you visit a webpage often, bookmark it so it stays a click away in your browser!

- Open the page you want to add a bookmark to.
- Find the star in the top right URL box.
- Click the star. A box should pop up.
- Choose a name for the bookmark and choose the folder.

Use desktop shortcuts (Aliases on Mac) for files used really frequently: If there is a folder or a document you use almost every day, consider making it a shortcut on your desktop.

- On your hard drive, find the file or folder you frequently use
- Right-click file and click "Create Shortcut (Make Alias)".
- Click created shortcut name once to type new shortcut name.