

10 Steps to Improving Your File Room

When looking for ways to improve their filing systems, people often overlook the physical setup of their file room - the kind of equipment and supplies they're using and how the records are filed in them. Since most of our information is still maintained on paper, we need to find efficient and effective ways of handling and storing it. Here are some tips on ways to make improvements to your file room.

Your Room, Equipment and Supplies . . .

1. Use shelving instead of file cabinets.

You can use stationary or mobile (also known as "compressed") shelving to gain more filing area per square foot. Many offices are using "Times Two" shelving successfully. Times Two shelving has shelving on both sides of the unit and the unit swivels so you can access either side. You can also get a variety of shelving configurations to accommodate special needs such as microfiche.

2. Don't use your file room as a store room.

Find somewhere else to store your supplies, Christmas decorations, and other non-record materials.

3. Use the right filing supplies for the type of equipment you are using.

If you use shelving, for instance, side tab folders work better than top tab. Using color coded folders or labels allows you to visually identify a specific class or type of file, improving access and helping reduce misfiles. Expandable or accordion folders work well on shelves because they have closed sides that prevent records from falling out.

4. Use labels and guides to help locate files and keep them current.

Labeling your cabinets or shelves and placing guide cards in drawers or on the shelves helps users find what they're looking for. Avoid sticking labels directly on the cabinets or shelves. You can get label pockets or sleeves with label inserts to place on the outside of equipment allowing revision of labels with a minimum of effort.

5. File special media in specialized filing equipment.

Many different types of shelving, boxes and cabinets are available for the filing of non-paper records such as slides, maps, and drawings. Filing these materials in the right equipment protects the media and makes them easier to find.

Your Records . . .

6. Keep your filing current.

The most recent documents received or generated in an office are the ones most often requested. Timely filing in the appropriate folders makes finding what you need easier.

7. Only keep files that need to be kept for current business.

Clean your files out on a regular basis. Transfer them to the Federal Records Center or recycle inactive files as specified by the approved disposition schedules. If you can't find a schedule for your records, or you're generating new records that haven't been scheduled, contact your records manager.

8. Organize your files.

Many offices mix general administrative files which have short life spans with program records which need to be kept longer. The Agency has an alpha-numeric file plan for your routine administrative records. You can develop your own file plan for your program files or get assistance from your records manager or the National Records Management Program.

9. Set up a charge-out or check-out system and be sure everyone uses it.

Files should be signed out by the person removing them from the file room - even if they're only going to be gone "for a minute." There should also be some sort of follow-up system for files that have been out for long periods of time. A year later it may be too late!

10. Leave adequate space in your file folders, drawers, or shelves for growth.

When documents are crammed into folders and folders crammed into drawers or shelves, they're harder to find. Folders can end up on the bottom of a file drawer; documents get torn and wrinkled; and users get frustrated. Leave room for growth (generally 1" for regular folders, 2" for accordion folders, and 4" in files drawers) so you don't need to transfer folders every time there's a new document to file.

For More Information

***Files Equipment and Supplies and Files Operations,
National Archives and Records Service, 1981. Contact
Joe Moeltner (contractor) at (202) 260-5272 for copies.***