

Organizing Computer Documents

The organizing of your computer documents is vital to your success in your professional and personal life. The average worker now loses over two hours looking for misplaced documents and emails on their computer. You can avoid this huge loss of time with organization through the use of folders and subfolders.

Benefits

- It is easier to locate a file if it is placed in a well-named subfolder. It is often difficult to find files that are not organized in any way.
- If you organize your documents into subfolders, you will be able to find all of the similar files together.
- The process of moving files to a new computer becomes much easier. You can simply choose a folder to move instead of all of the individual files associated with a topic.
- If you are synchronizing files to another computer, you will be able to quickly decide if files have been synchronized.
- When choosing which files you want to back up, you can simply choose folders that need to be backed up.
- Lastly, by organizing your files, it will be easier to keep them organized in the long-run.

These file management tips will help make your files more accessible. This document will show you how to design and create a folder structure for your network custom to your nonprofit. This document will also show you how to create folders on your computer, establish a naming convention so your documents will all have consistent names, and create shortcuts to refer to documents in multiple locations.

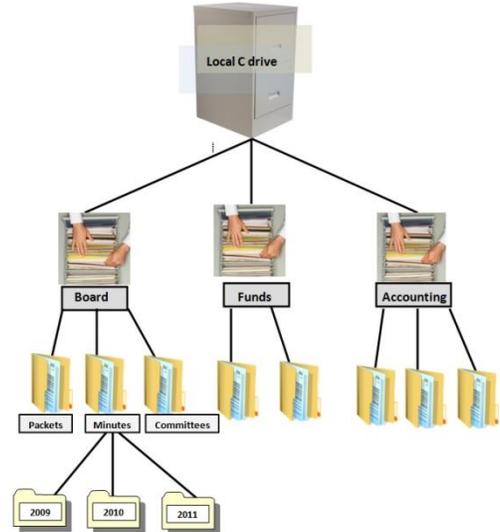
Designing and Creating Folder Structure

Designing Folder Structure

In order to organize your files, you must decide exactly how you want them organized. It is important to design your folder structure first before you actually create the folders. Your folder structure will consist of main folders and subfolders. Below is an example of a hierarchy. Your hierarchy will be different depending on your organization's processes.

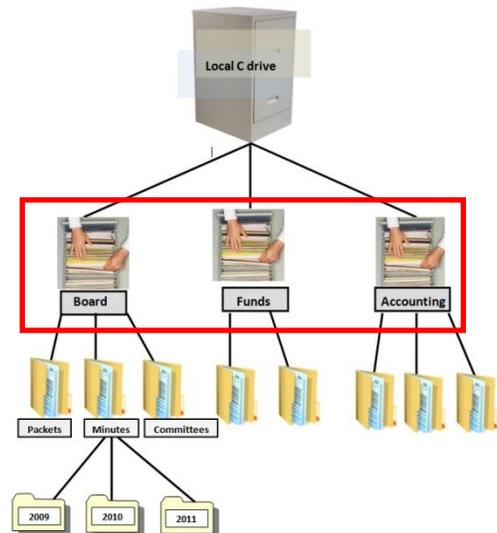
Some questions to consider before starting would be:

- What types of documents and data are stored on server?
- Do multiple people need access to certain documents and if the type of access is different? For example can everyone including volunteers and interns see all the documents, or are some confidential and only upper management can view them?
- What are the major organizational areas of your nonprofit?

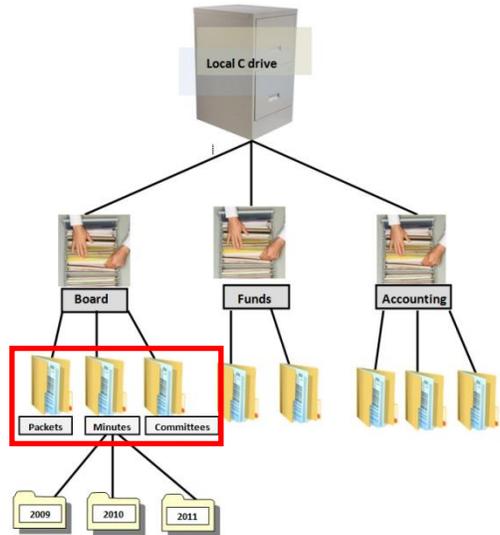


Steps in Designing Folder Structure

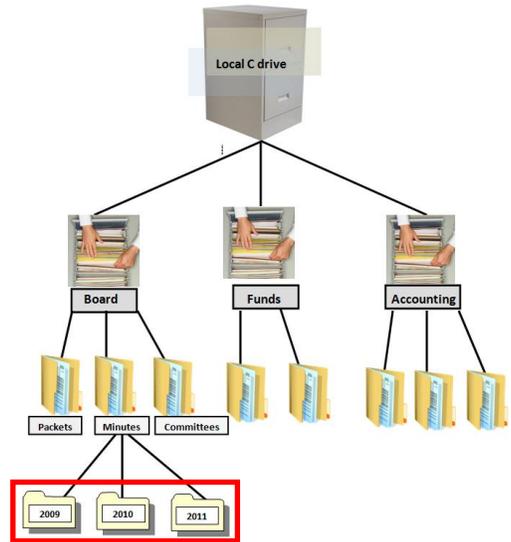
1. Decide on the main categories in your nonprofit organization; most of the time, these are going to be departments or major business activities. Later, you will create main folders that correspond to these departments or activities. Examples of main folders are boxed in the diagram on the right.



- Next, identify subcategories that correspond to groups of specific tasks, business activities that relate to the main category, or types of documents. Examples of subfolders are boxed in the diagram on the right.



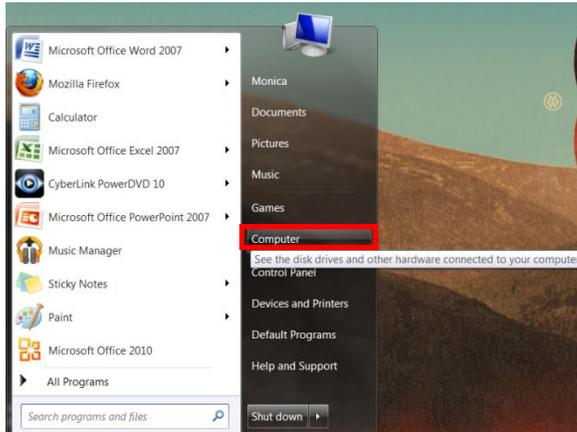
- For business activities that recur each year, you may want to define another level of subfolders organized by year. By organizing subfolders by year, it will be easier to locate past versions of files. It will also be easier to quickly delete older files that you no longer need from previous years.



Creating Folders

By creating the organized structure, you will place all of your documents into the folder structure that you have designed. Note that these instructions are based on Windows 7.

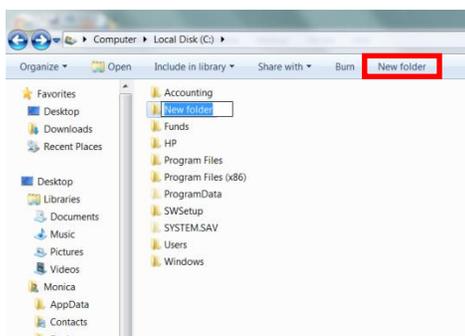
1. Select Start. Then, choose Computer from the options on the right hand side.



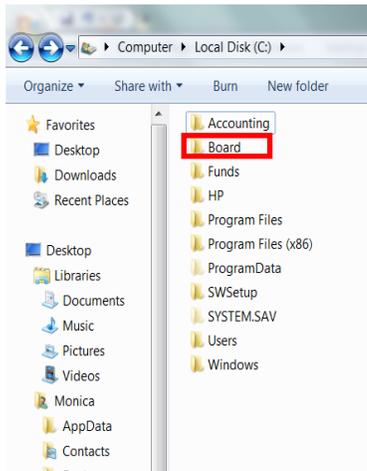
2. Double click on the storage drive you want to create all of your business documents in (e.g. the C drive).



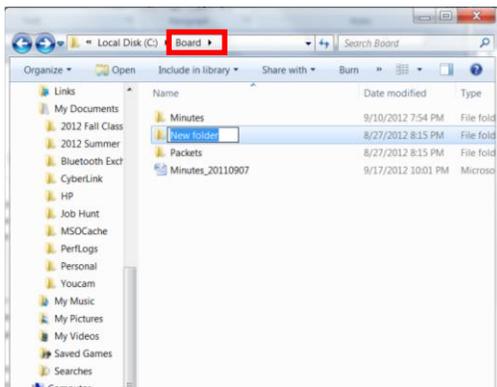
3. To create a main folder, click new folder in the toolbar.



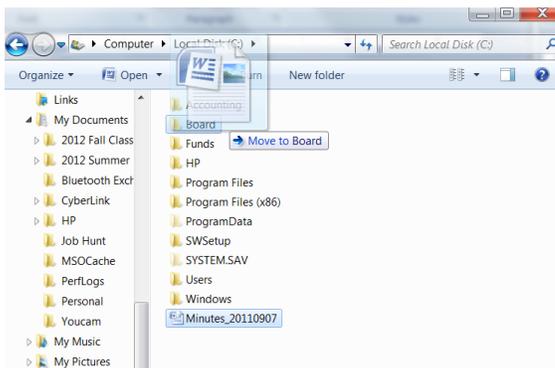
4. Type in your main folder name in the space where it says “New Folder.”



5. To create subfolders, double click the main folder that you want to create a subfolder in. Repeat steps 3 and 4 for each subfolder you want to create.



6. You can move your files and documents by clicking and dragging the documents into different file folders.



Establishing Naming Conventions

Naming your files in a specific fashion also helps you to organize your data. This will make finding your documents inside of folders easier later on.

Tips for Naming Documents

- When it is important to keep prior versions of documents, use the date in the name of the document so that you can revise the document and save it differently than the prior version. Simply put the date at the front of the document name. We suggest that you format your dates in the yyyyymmdd format.
- We suggest using underscores in between words for making file names easier to read.
- Use brief, but fully descriptive names.
- To more easily manage drafts and revisions, include a version number. When you are numbering files on a network, always use at least two digits for your numbers. If you do not have two digits for numbers less than ten, the computer will sort files incorrectly. For example use “V01” at the end of your file name instead of “V1” to note the first version.
- Do not use all capital letters.

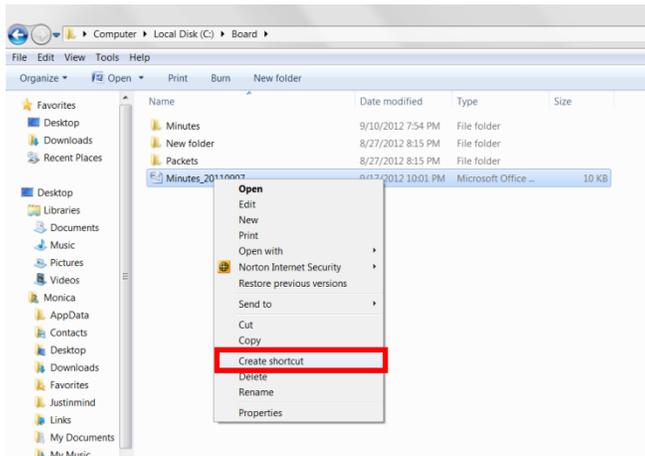
Examples of Well-named Documents

- 20120615_End_Of_Year_Appeal_V04.docx
- 20110517_Scholarship_Presentation.docx
- 20120402_Johnson_Fund_Agreement.docx
- 20100731_Smith_Welcome_Letter_V01.docx

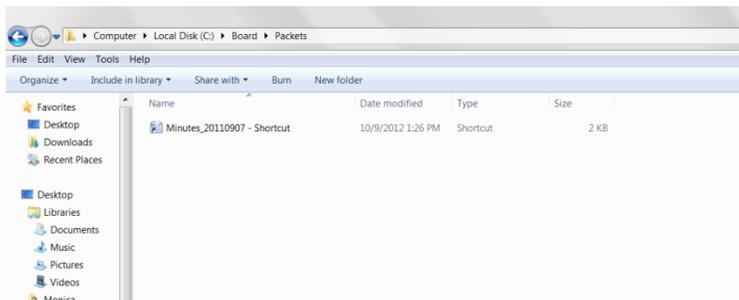
Referencing Files from Multiple Folders

Rather than create multiple copies of a document in different folders, you can use shortcuts to refer to it in multiple locations.

1. There may be some instances where you may need to access documents from multiple folders. Shortcuts are links to files or programs and are represented by icons with an arrow in the lower-left corner. To create a shortcut, right-click the file and then click Create Shortcut. You can drag the shortcut to other locations.



2. After you create the shortcut, you can move it to a different folder. Now the shortcut of the original Minutes documents is also in the Packets folder.



Note that by creating shortcuts on the server, they will show up in various folders. You can only create a shortcut in a folder if you have permission (access) to the folder you are trying to create the shortcut in.

Sample Folder Structure

A sample template is provided below to help you begin deciding how you want your files organized. This sample template was used on by another nonprofit organization, but the folder names have been changed in order to guide your nonprofit. Personal folders and files maintained on your website can also be stored on the network drive, as indicated in the diagram.

