

Name files are used in obvious situations. In the early stages, dividers listing the letters of the alphabet are sufficient, but as the volume increases, such as in the case of student records, the basic letters can be further broken down to expedite filing and searching.

Every segment of a file will probably require a miscellaneous folder for one or two page items under that category. However, don't wait too long before making a separate folder for any item that begins to accumulate papers. Usually when a subject filed under miscellaneous gets up to about five or more items, it should get its own folder.

Correspondence files for the same person or firm that have no readily discernible breaking point should be broken down into time segments.

In most file folders the material is arranged in chronological order. In the miscellaneous file the material is arranged in alphabetical order according to subject. A main file may have several sub-files or inserts when the work can be broken down into specific functions which are related but not a part of other sections.

Color coding of files can be very useful to expedite filing and information retrieval. Sometimes the file tab can be color coded or the entire folder can be of a specific color to attract attention or to identify the material. For instance, in one foundation all the correspondence files of the clients had a blue tab. In another case, a red tab cautioned the searcher or file clerk to be aware of the fact that this material was also cross filed elsewhere or merely that this file had something special about it. If red and black typewriter ribbons are used, the main heading of a folder can be typed in black and the subheading in red.

A card index for subject files is highly desirable to prevent filing material under a new heading when you already have a folder for the subject and to enable other workers to locate material in the file.

Make an index card for each subject heading and subheading. Show for each subheading the main heading under which it is classified. When a subject is not self-explanatory, describe on the card the material covered by it. Also, make cross-reference cards for subjects on which there is insufficient material to justify a separate folder and for subjects under which material might logically have been classified, but for which you chose some other heading. A small firm with unknown growth potential may find it very worthwhile to start a card index very early in its existence.

Name and subject files can or must oftentimes be combined to make the information more functional, but this is an easy variation of the basic systems. Keep in mind the basic criteria of a file system.