

Converting to a New Filing System



A new, well-planned filing system is a pleasure to use and helps everyone in the office work more efficiently. But converting your existing files to a new filing solution can be a daunting task, unless you make and follow a clear plan for making the change. Many times offices will continue to struggle with their existing system because they worry that making a change will take too much time, or important records will be lost. Sometimes a move to new office space, or a merger with another company or department will force a change to a new filing solution.

Investing In Change Brings A Positive Return

The benefits of using an efficient filing system are well worth the effort needed to convert your existing records to a new filing method. Depending on the number of records that you have, converting may be something that can be done with internal staff, or it may make sense to bring in outside help. Sometimes, companies take a day-forward approach. All files created after a certain date utilize the new system and legacy files remain in the old system to be converted according to a schedule and plan that may occur over several weeks or months. Converting your filing system also provides an excellent opportunity to purge the system of unneeded documents.

Find A New Side To Your Existing Folders

For many companies, a shelf filing system is the most efficient filing method and the least costly. This requires folders with indexing on the side or end tab instead of on the top. An inexpensive solution for converting from top tab drawer filing to shelf filing is to modify existing files with End Tab Converters. These are self-adhesive tabs that adhere to standard top tab folders so they can accommodate a SmartStrip® label. Converting the system simply requires adding the tabs and applying new indexing labels.

Your new filing solution may call for a different type of folder than used in the past, such as Fastener Folders or Classification Folders. If you have all of your file headings in a database or spreadsheet, you may want to order your new filing supplies pre-labeled with color-coded labels already applied. Converting the system simply requires moving documents into their new folders and placing them in the new filing equipment.



Make Sure Everyone Using The New System Is Trained

A filing system is only effective if its users are trained on how to use it. Conduct training sessions so all personnel clearly understand how to look up files, return them to the system and utilize file tracking while they are using documents. A retention schedule should be put into place to keep the file from getting overloaded.

Plan ahead, follow the plan, and make sure everyone understands how the new filing system works. The return is higher productivity, lower costs and a happier workplace.