# Efficient filing: a personal account

Brian Martin

15 August 2006

Visitors to my office often remark on how different it is. On two walls there are shelves from floor to ceiling, most of them filled with manila folders. I can usually find a relevant bit of information quickly, to the amazement of some colleagues.

These days, most of my filing is on the computer rather than pieces of paper in manila folders, but the principles are much the same.

I spend a fair bit of time maintaining my files and put some thought into the way I do it. This is a brief account, not to recommend my own system but to encourage others to gain the benefits of sensible filing.

It's useful to think of files as extensions of the brain, which itself has a wonderful filing system. In my case, there seem to be three main purposes of files: record keeping, job relevance (research and teaching) and learning.

For the brain, forgetting is just as important as remembering. If we remembered everything that happened to us, our brains would be impossibly clogged with irrelevant details, such as the colour of a car you saw in passing a decade ago or a telephone number now out of date. So let's start with the file equivalent of forgetting: throwing things out, or not filing them in the first place.

Decades ago, in moving to Australia, I left behind 2/3 of my books and at that point decided to stop building a book collection. Instead, I order books for the university library. If I buy a book, I usually donate it to a library when I'm finished.

This greatly reduces the number of books in my office compared to most of my colleagues.

For many people, it's extremely hard to part with books. They are part of their identity. The usual rationale for keeping them is that they might be useful. And that's absolutely correct — they might be. So I adopted a rule: if I hadn't consulted a book in five years, in all likelihood I would never consult it again, so I gave it to a library. (If the library already had a copy, I gave it to a friend or colleague.) If I actually did need it, I could always check it out, which has happened occasionally. Gradually I've reduced my time limit for giveaways to a year or so.

With the rise of online book purchasing services, there's even less justification for keeping a book "just in case," because you can always buy a copy if necessary.

I subscribe to 25 magazines and journals and used to subscribe to 100! Getting rid of these has been more difficult for me than getting rid of books. But if a library has a subscription, what's the point of having them in my office?

The point is sentimental value. And that's a perfectly good reason for keeping files. It can be nice to go look through treasured childhood books, and much else. So by all means keep plenty of stuff you never use and are never likely to. Just be clear: it's there for sentimental reasons. For more efficient working, it might be useful to keep it in a separate place.

## Record-keeping

Some things need to be saved, just in case, such as minutes and notes from committee meetings, drafts of papers, and emails. For a committee of which I'm a member, I keep a current file of all relevant papers, and perhaps a computer folder. But I clear out these files periodically, assuming minutes and the like are kept centrally. If I chair a committee or play a special role, I keep my files in case the issues recur.

Similarly, I keep an e-folder and manila folder for an article in progress. After the article is published, I clear out the manila folder of anything not needed for future reference. I keep print correspondence with the publisher, in my alphabetical correspondence files (see below). Printed copies of early versions I can usually throw out — I have e-versions anyway. I file research material — such as interview notes — in my research files. And I keep a manila folder with reprints, in my publication files.

Because e-folders take no physical space, I keep nearly everything, including correspondence and early versions of the paper. This is helpful if I want to retrieve something deleted from an earlier version of an article or to see where an error crept in. But keeping early versions can be a nightmare if they get confused. I don't rely on file creation dates, because I had the experience of losing all of them in moving to a new computer. So I put creation dates as part of the name of the file. In my system, an article about filing written on 18 January 2006 has the name *filing 06/01/18*. It's in a folder with the name *filing*. The advantage of this system becomes apparent when you display the folder contents as a list: the files arrange themselves chronologically, with the newest ones at the bottom. (For paper files, I use reverse chronology, with newest items on top.)

## Filing and learning

I've always done a lot of reading. There are so many interesting things to find out about! In the mid 1970s, I realised I was not slowing down to think all that much about what I read. I would finish one book and go immediately to the next one. So I decided to take notes on books and articles I read.

As I read a book, every time I come across a point I think is important — often because it's relevant to my current interests — I write page and paragraph numbers on a slip of paper, for example 147P-2 for page 147, the second paragraph from the bottom. When I finish the book, I handwrite notes on A4 paper. I start with full bibliographical details, plus the date I made the notes, how I came to read this book and how thoroughly I've read it (read completely, skimmed portions, just the introduction and conclusion, etc.). I try to write a one sentence or paragraph summary of the key contribution of the book. If the book is important to me, I do this for each chapter. Then I look up the page-paragraph references I noted earlier and summarise the key ideas there.

Now for filing. I have set up a file of manila folders with all my reading notes, alphabetical by author. This started off as a single folder but after three decades it's several shelves full. Along with these notes I also file paper correspondence. So I can look under a person's name and find my paper correspondence with them — often useful to find when we first made contact — plus my notes on anything of theirs I've read.

If I were starting again, I might put my notes on computer, which would make searching them far easier. But I started on paper and it's easier to continue on paper. This has brought home to me how filing systems perpetuate themselves. It's valuable to design a sensible system from the start.

If the book or article is on a topic relevant to my research interests, I make a photocopy of my notes and file the photocopy in a manila folder, on the topic, such as *democracy, defamation,* or *language and action*. These topic files are very useful when I'm planning an article. I can leaf through my notes and remind myself about important points. Later, after writing the draft of an article, I can leaf through the notes and add any important references I hadn't thought of already.

When a topic file gets too large, I divide the contents into several folders, by subtopic, for example *suppression of dissent* into *academic cases and academic freedom; censorship and free speech; government, surveillance, political repression; miscellaneous; science, technology, medicine; whistleblowing*. They are filed in my bibliographical files under *suppression* and then alphabetically by the subcategory.

As well as files of my notes on readings, I also have manila folders filled with journal articles, newspaper clippings and so forth. These aren't quite as useful as my notes, because to get key points from their contents I have to skim through them again. So I often throw out copies of articles after I've read them and finished writing in the area for the time being, unless I expect them to be of prime importance later. If I have notes, I can almost always obtain a copy of the article again.

For at least half of my notes, I never look at them again after writing them. But the note-writing process is still valuable as a useful discipline for encouraging me to think about what I've been reading. Also, writing notes is a powerful way of learning, which occurs when materials are processed through the brain. Of course reading is itself a mode of processing, but writing is a more transformative processing.

In the longer run, my most important method of filing is my writing, namely my own articles and books. In writing an article, I give citations, putting a source in the context of my own thinking. Years later, I can regain a good sense of my thinking by reading my own articles or, more commonly, skimming through them to look for key ideas and references. I know, as I prepare the index to one of my books, the most important user of the index will be me, when I want to check what I said about a particular point.

So writing is a form of filing, too, though one with shortcomings as well as strengths. The format of most publications doesn't allow the sort of detail about sources that would really be useful. Nevertheless, it's worth thinking about using one's writing as a filing system.

**Filing on computer**

Decades ago I submitted an article to a US Friends of the Earth publication, but received no reply. Some months later I was able to visit the San Francisco office of Friends of the Earth. One of the staff remembered my submission and went to a huge table covered with papers to a depth of about 10 centimetres. Amazingly, he was able to retrieve my letter from the mess — it wasn't too far down!

The same lack of filing can occur on computers. I saw one colleague's computer desktop covered with so many icons it was impossible to see the background. In fact, the icons

were about three deep. But he seemed to be able to find things, after a bit of searching.

A messy desk and a messy computer desktop are okay when the amount of material isn't too great. If there are dozens or even hundreds of items, the mess may be manageable. In the short term, it's quicker to be messy. But when you ramp up to thousands or tens of thousands of items, filing is essential to have a hope of efficiency. Those big refuse heaps of paper or computer files are almost worthless.

For my computer files, I use folders within folders. It's neat and easy. The main challenge is to work out the categories. My main categories are *admin, correspondence, misc, research, teaching* and *web*. Let's look inside one of these: *teaching*. The subfolders are *100 level, 200 level, 300-400 level, 900 level, misc, pub mentor, supervision* and *talks*. Within *300-400 level* the subfolders are *other, STS300, STS323/324, STS331/333* and *STS390* — except for *other*, these are files on third-year subjects I've taught. Under *STS390*, I have subfolders *STS390 04, STS390 05* and *STS390 06*. When I prepare for a new class, I copy the previous folder and then update relevant files. Within *STS390 06* I have several folders.

It can become annoying to proceed through numerous nested folders, for example when switching between current teaching and current research. So I have a modification. For this year's teaching, I put the subject folders higher in the hierarchy. So *STS390 06* goes in the folder along with *100 level*. I rename the folder *06 STS390* so it appears at the top of the list. At the end of the year, I'll relegate it to go alongside *STS390 04* and *STS390 05*.

A fair bit of time is required to maintain a filing system. It's quicker to leave a new file —

one sent by someone else or one I've created — on the desktop, either the physical or the computer desktop. I do this all the time. But nearly every day I try to clear items from my desktops so they don't accumulate.

I have a highly productive friend who periodically gets into a panic trying to find an important item somewhere in his office, spending hours searching through files and piles. That can happen to anyone, because things accidentally get stuck in the wrong place. But with a well designed system, it's much less likely. I find that the time I spend maintaining my system pays off in time saved in retrieving things when I need them.

My system is special — special for me. I've designed it for my purposes and it wouldn't necessarily be effective for others. The challenge is to design a system that works well for you. It's worthwhile looking at other people's systems to get ideas, but the ultimate test is using your own system.

I'm still learning new tricks for filing. This year I read David Allen's book *Getting Things Done* and found many valuable ideas.

As the years go by and the information deluge grows, it becomes ever more important to screen out items rather than file them. But I think the same principles are helpful.

• Treat filing as an extension of the brain.

• Distinguish between use value and sentimental value.

• Distinguish between record keeping and materials in active use.

• Treat filing as part of a learning process.