



# FILING GUIDE

A COMPREHENSIVE GUIDE TO FILING FOR THE OFFICE PROFESSIONAL



# Count On The Only Hanging Folder With The Strength Of SureHook®

WOW, these hooks are **STRONG!** They won't bend even when the folder is stuffed.



## SureHook® Features Longer Flexible Hook Technology



Secure on Rails



Slides Easily



Less Bending

**Pendaflex**  
**SureHook**  
REINFORCED HANGING FOLDERS

[www.pendaflex.com/surehook](http://www.pendaflex.com/surehook)

## Filing. Get it done...Faster, Easier, Better.

Filing efficiently means taking the right approaches. And nobody knows those approaches better than Pendaflex®, the global leader in filing. After all, we invented the world's first hanging folders more than a half century ago and we haven't stopped innovating since.

Chances are, you have plenty of paperwork that has to be organized for quick retrieval. You probably also have important records that you want to prevent from getting lost. So which techniques and tools will work best in keeping track of household files such as insurance papers and mortgage records? Which will work best for a small business office? And what about storing and retrieving

"problem" files such as bulky reports and catalogs? This new edition of the Pendaflex How to File Guide A Comprehensive Guide To Filing For the Office Professional answers all these questions and more.

Written by the leading document management experts in the world, this guide will become an invaluable resource to help simplify your life. Learn smart shortcuts that can save you time. Maximize the performance of your filing system. See how to troubleshoot your files so they stay in peak working order. And find out about the latest filing products. It's all right here, a step by step guide that can take your filing **from to do...to done.**

# READY • SET • BEGIN

## Basic Filing Tools.

There's an art to efficient filing, and just as a great portrait painter needs the right brush and canvas to complete his work, you need the right organizing tools.



### **The Filing Cabinet**

For most home filing systems, a compact 2-drawer file will give you ample storage space, along with professional touches like sturdy steel construction and built-in rails designed for hanging folders.

Small businesses may need to step up to a full-size vertical or lateral file cabinet, each containing as many as five drawers.

**Quick Tip:** before making your purchase decision, be sure the cabinet you want fits the space where you intend to put it – with room to open and close the drawers.



### **Drawer Frame**

If your file cabinet is not equipped with built-in rails for hanging folders, you will need special drawer frames that can be placed into the cabinet in seconds. Pendaflex® offers many highly durable frame

systems to choose from, including several that snap together instantly without tools and also adjust quickly for letter and legal size filing.

For a demo visit:

[www.pendaflex.com/templates](http://www.pendaflex.com/templates)



### **Pendaflex® SureHook® Reinforced Hanging Folders**

It pays to go with the best. Pendaflex® brand hanging folders are superior to any other brand on the market.

Think about it. Do you want to replace worn and torn folders

constantly? Of course not, because that will cost you time and money. Pendaflex® hanging folders feature poly-laminate reinforcements for 10 times more durability. In fact, many Pendaflex® branded products have a lifetime guarantee!

Genuine Pendaflex® hanging folders come in various sizes and in 13 colors for categorizing files by color (see color-coding section in this guide).



### **Pendaflex® Interior Folders**

Interior folders fit perfectly inside your hanging folders to divide related yet different project papers into sub-categories for faster referencing. Pendaflex®

interior folders are cut shorter than traditional file folders so they won't hide hanging folder tabs. They come in letter and legal sizes, in manila, and also in 13 colors to match Pendaflex® hanging folders.

**Quick Tip:** hanging folders should never leave the filing drawer, however, you can use interior folders for safely carrying files from place to place.



### **Insertable Plastic Folder Tabs**

Like the icons on your desktop, these visual signals point to where you need to go when finding a file. Flexible transparent tabs hold your folder headings and protect

them from wear and tear. They slip easily into the pre-cut, tear drop-shaped slots in each hanging folder.

**Quick Tip:** stagger the positioning of your tabs on the tops of hanging folders, providing unobstructed visibility of each tab.



### **Inserts and Labels**

Inserts are sturdy strips of paper on which you'll print or type your headings for each file. They slide into the plastic folder tabs. Blank inserts are included in packages of Pendaflex® tabs.

For customized convenience, Pendaflex® includes inserts designed for printing your own personalized file headings using your desktop computer printer in all boxes of Pendaflex® brand Reinforced Hanging Folders.

# ASSEMBLE A FILING SYSTEM

## Don't worry, it's simple.

All it takes to get your system going is these 6 steps:



1. Put the cabinet in place.



2. Put the frame into the drawer (if your cabinet already has a built-in frame, skip this step).



3. Use Ready-Tab® Hanging File Folders, or slide the inserts into your plastic folder tabs, or apply self-stick labels.



4. For plastic folder tabs, gently flex the folder tabs between your thumb and forefinger, and insert the tabs into the slots on your hanging folders.



5. Place tabbed folders on the drawer rails or frames.

**Quick Tip:** make sure that each folder sits directly on the rail or frame, allowing for free and easy "gliding" action.

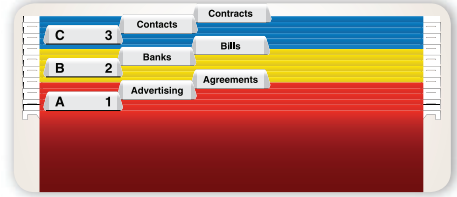


6. Have your interior folders ready and put them inside the respective hanging folders to divide project papers into categories.

# SETTING UP YOUR FILES

## Which filing method is best for you?

The actual files in any two homes or offices may not be alike, but one thing remains the same: the need to organize those files for fast, accurate finding. In order to ensure quick, error-free filing, we recommend either the subject filing method or the name filing method.



## Subject Filing

For most home files, subject filing is the best choice. Papers are arranged by category, similar to the Yellow Pages of the phone book. Folders are tabbed with subject headings, then placed in the filing system in alphabetical order.

Before setting up your subject file, it's a good idea to make a list of subject headings based on what will be filed. The list should then be kept in the file itself, as a table of contents, making certain that incoming papers get the right headings and are filed in the proper place. With a well planned and executed subject file, household and home records such as warranties, home repair records and tax receipts can be located any time you need them.

## How to set up your Subject Folders

The headings that you put on each hanging folder in a subject file depend entirely on the nature of your business, or if you have a home office, what kinds of home office records you need to file. There's no steadfast rule about how to make up titles for files as long as the titles or headings you choose fulfill your needs.

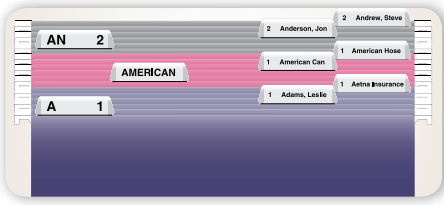
For instance, let's say you work in the purchasing department of a company that makes printing presses. Your department buys materials for the company in six main areas:

Control Devices   Instruments   Motors & Drives  
Electric Circuits   Metals & Materials   Miscellaneous

Start by arranging these six areas in alphabetical order, and make them your main subject headings. Then set up the divisions and sub-divisions you need to make.

You may need to set up an entire drawer or even a whole cabinet to a single subject. That will depend on the number of divisions you will need to include as well as the amount of information.

# SETTING UP YOUR FILES (continued)



## Name Filing

Many small business offices use the name filing method, which literally means that files are arranged alphabetically, last name first...similar to the White Pages of the phone book. Examples would include A-Z files displaying headings of the names of customers, vendors, employees and contacts.

Name files work best when hanging folders and interior folders are used together. For instance, you might have a hanging file tabbed with the heading "American." Inside the hanging folder, you could have a separate interior folder for each name that begins with "American, American Can, American Hose."

## How to Set up your Name Folders

Here are 10 basic rules to help you label, arrange, file and find your files.

1. Put a person's last name first.

This also applies to businesses named after people. Just arrange the last names in alphabetical order:

Anderson, William  
Gillan, Barbara

However: If the name is followed by Inc., Corporation, Ltd, etc., you would file the name by first name:

John Deere Inc.  
George Smith Glass Corporation

2. Nothing comes before something.

A last name, when used alone, comes before a last name with an initial, and that comes before a last name with a full name:

Alexander  
Alexander, S.  
Alexander, Steve

3. Prefixes come before the rest of the name.

Consider all prefixes as the beginning of the name they're attached to and arranged them as they are spelled.

File FitzPatrick as FitzPatrick  
**not** Patrick, Fitz  
File Saint John as Saint John  
**not** John, Saint

4. Spell business names exactly as the business itself spells its own name.

File General Electric Company  
**As** General Electric Company  
**not** Electric Company, General

5. Ignore "The" at the beginning of a name.

File The Global Transactions Corporation  
**As** Global Transactions Corporation, The

6. Ignore the hyphen in hyphenated words.

File Lawson-Petersen Architects  
**As** Lawson-Petersen Architects  
**not** Petersen Architects, Lawson-

7. One word is always better than two words.

File Interstate  
**As** Interstate  
**not** Inter State

8. Two word geographical names are considered one word.

New Hampshire, Los Angeles, Mexico City, and South America are all filed according to the first letter of the first word.

Note: Abbreviations such as St. Louis are filed at Saint Louis

9. Always file numbers before letters.

Numbers (1,2,3, etc) when used without letters, always come before letters and before letters with numbers. For example, file in this order  
3652  
R3652  
RF3652

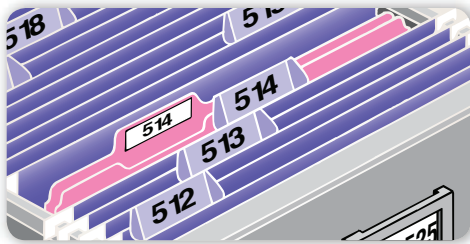
10. File political divisions with the major name first.

This is because you'll almost always look for the information you want under the major name first.

File The Board of Estimate of New York City  
**As** New York City, Estimate (Board of)  
File U.S. Department of Agriculture  
**As** United States Government, Agriculture Dept.

There are probably many more rules, why not start with just these ten. When in doubt you can always refer back to the phone book. Let common sense dictate.

# SETTING UP YOUR FILES (continued)



## **Numeric Filing**

In most cases, numeric files are recommended for high-volume filing requirements. This could include the recordkeeping needs of big companies or organizations who need to file many documents on a regular basis.

## **Creating a Numeric File**

Numeric Filing uses numbers instead of names or subjects for file headings. Filing numerically is especially efficient in large filing systems because the files are set up, as the name implies, in sequential order. For instance, each file number, in order as follows: "001," "002," "003" and so forth. This allows tremendous room for growth as your filing needs expand, simply because you can continue adding more numbers to the sequence. Numeric filing is also the most accurate, because you won't have to worry about spelling or alphabetic order.

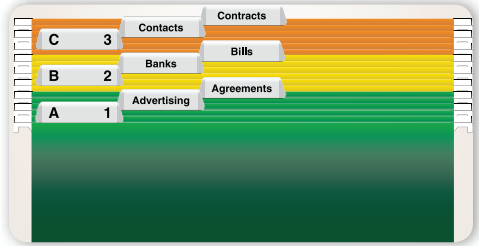
Another advantage of a numeric filing system is security, since the folder headings do not reveal their contents. With a numeric filing system, you can't just pull open a file drawer and tell what's inside.

On the other hand you need a way to find out what each number represents. In fact, that is the key to successful numeric filing.

You must have, close by, quick referencing:

- 1) An alphabetical card index where you record the name or subject of each numbered file.
- 2) A register book (a 3-ring binder works well) that lists all the numbers in use and the numbers available for new files.

To number your files correctly, refer to your register. As you might guess, a numeric file without both an index and a register book is basically worthless... you'll never be able to find anything. If you choose to go this way **GUARD THE INDEX AND THE REGISTER WITH YOUR LIFE.**



## **The Importance of Color Coding**

Studies have shown that the use of color can make filing twice as fast. It's easy to see why. Color differentiates files from one another, instantaneously, while also preventing misfiles. As mentioned earlier in this guide, Pendaflex® gives you a choice of 13 colors for a rainbow of color-coding options. To follow are two great ways to make the most of color.

## **Pinpoint folders that need special attention.**

A different color makes special folders such as rush projects, customer correspondence or unpaid bills stand out in a file drawer. For example, let's say like most people you print out your emails from customers and other business associates. In a drawer full of blue folders, put those printed emails in red folders so you can reach for them easily whenever you need to follow-up with a customer.



## **Divide groups of papers in a file drawer, making entire categories clearly visible.**

Creating blocks of same-color folders in your filing drawer gives you a visual guide that automatically directs your fingers to a particular section of the file. You could,

for instance, have a block of 12 green folders each containing your monthly credit card statements. In the same drawer, next to the green block, you might have 12 yellow folders each containing monthly bank statements. Your chances of mixing up the two categories are practically non-existent. Furthermore, misfiles such as a green folder in the yellow section can be spotted instantly.

# MAXIMIZE FILING PERFORMANCE

## What to do, and what not to do.

Here are some common-sense rules you should always follow. The payoff? You'll save filing time and frustration, right from the beginning.

1. Repair torn pages before filing. A strategically placed piece of transparent tape will do the trick, preventing ripped and ragged papers from riding up on one another...which could block your view of folder tabs.
2. Staple papers together when they deal with the same name or subject, but never use paper clips because they tend to catch onto other papers, causing confusion.
3. Code every paper before you file it. Relax, it's easy! Just print the file heading in pencil in the upper right hand corner.
4. Sort all your papers in the correct order according to your filing system, whether your files are arranged by subject or name. The few moments spent arranging your files before placing them into the drawer will translate to time savings later on by making certain that each paper is put where it's supposed to be.
5. File regularly. Paperwork, like dirty dishes in a sink, can build up in no time to create an unproductive mess. Schedule a special time each day for filing, you'll be surprised that it only takes a couple of minutes!



6. Create an inactive or "archive" file and transfer your active files into it every six months. This will keep your "working" files up to date and also continually allow room for new files as you add them to your filing system.

# TROUBLE SHOOT YOUR FILES

## How to fix what may not be working.

The engine in your car needs periodic repairs and tune-ups to keep running efficiently. So does your filing system. Use the following checklist of questions to avoid the most common filing mistakes.

### Are you using too few headings?

Generally, you should not have more than 4 folders in a row without some kind of subheading.

### Are you using too many folders?

Do not set up a new folder until you have 20 or so related papers to go into it.

**Quick Tip:** use a "miscellaneous" folder at the beginning of each file section to hold a small amount of records.

### Are your folders overstuffed?

It can be tempting to stuff as much paper as humanly possible into each folder, but don't. When you have 3/4" of papers in a folder, add another folder right behind it. Or, use a Pendaflex® Extra Capacity Hanging Folder (described in the "Give yourself every advantage" section of this guide).

### Do you use interior folders?

Even if your folders have the recommended 3/4" of contents, finding a single paper in that stack can take too much time. With Pendaflex® interior folders, you can divide papers into easy-to-manage groups. In addition, you can color code them for quick identification.

### Are your folders worn and torn?

You would be amazed how this can slow down filing, and, produce costly misfiles or even lost documents! The reinforcement designed into Pendaflex® folders insures the longest life and the most dependability.

### Are your drawers overloaded?

Leave a full 4" of space in each file drawer, allowing room for your hands to get into the file. Also, as you pull the tab on a hanging folder forward, the folder will form a "working V" that enables open access to its contents.

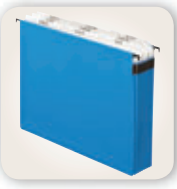
### Are you tabbing correctly?

Readability is absolutely essential to being able to locate files rapidly. As stated previously in this guide, remember to stagger your tabs across the tops of folders so each tab can be seen clearly. And whenever possible, it's best to use preprinted tabs...or tabs custom-printed on your laser or inkjet printer...rather than writing your headings by hand.

# GET MORE FROM YOUR SYSTEM

## Filing tips that increase productivity.

Your life is busy and you want to tackle and finish filing tasks as soon as you can so you'll be able to move on to other projects. Here are some productive tips.



### Designate a Tickler File.

Use expanding files with numbered daily and monthly slots. Use the daily slots to file date-related papers for the current month, and put longer-range material into the appropriate month's section.

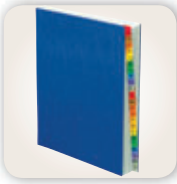
Check the file daily for active work and transfer papers from the month file to the daily file at the beginning of each month. "



### Clear the clutter.

Your desk is the focal point for getting things done, in a home office or a business office. And a cluttered desktop can steal time and concentration from your day. Using desktop organizers such as the

Pendaflex® Expanding File with Sliding Cover, with expandable bottom for easy desk set-up, can be terrific solution for keeping your workspace clear.



### Pre-sortint opiles.

Start by sorting papers into two piles: items that must be handled quickly and those that can be put aside or stored out of site. As indicated in the "Maximizing filing performance" section of this

guide, sorting your papers before putting them into folders can eliminate time that might be wasted on misfiles.



### Toss useless papers.

Believe it or not, the average business retains 70% more documents than it really needs. Furthermore, 85% of the letters and forms that are filed are never looked at again. Translation?

Throw out papers you're sure you won't be using.

# GIVE YOURSELF AN ADVANTAGE

## Intelligently designed Pendaflex® products will make your life easier.

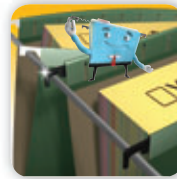
Before we design any Pendaflex® hanging folder or organizer, we go straight to people like you and ask for feedback about what features you like. This results in products that work better.



### Score lines for accessibility.

Pendaflex® hanging folders have a special score line that runs side to side about halfway down each flap. When accessing a file, pull it up, crease the folder along the

score lines and prop it open (like wings) on top of neighboring folders. This allows you to quickly get your hands on the folder's contents, very useful when making a quick copy or checking a record momentarily. When you're done, just close the folder and slip it back into the drawer.



### Eliminate sagging files.

Pendaflex® SureHook® Reinforced Hanging Folders are smart by design, with longer plastic hooks and revolutionary built-in tension springs. With extra-sturdy rods

and hooks, they're more secure, bend less, and will always stay on track.



### Extra Capacity Hanging Folders for thick materials.

Filing lengthy documents, such as an investment prospectus or other thick items including manuals and magazines, can be difficult or impossible in regular folders.

No problem, just use Pendaflex® Extra Capacity Hanging Folders, specially designed with squared-off reinforced bottoms to accommodate bulky materials. These folders can be placed in your hanging filing drawer right alongside your other files, keeping it all in one easy-to-find place.

**Quick Tip:** match the width of the Extra Capacity Hanging Folder (available 1", 2", 3" or 4") with what you expect to file...i.e., 2" of paper is perfect for a 2" folder, however, it would flop over in a 4" Extra Capacity Hanging Folder.

# SOLUTIONS FOR SUCCESS

## New filing innovations and problem solvers.

As the worldwide innovator in helping people get things done, Pendaflex® is constantly pushing the envelope by introducing clever new ideas. Here are just some of our latest product solutions.



### Pendaflex® SureHook® Reinforced Hanging Folders

Smart by design, with longer plastic hooks and revolutionary built-in tension springs. With extra-sturdy

rods and hooks, they're more secure, bend less, and will always stay on track.

SECURE ON RAILS



SLIDES EASILY



LESS BENDING

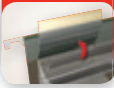


### Pendaflex® Ready-Tab® Built-in Tab Hanging Folders

No more lost tabs, no more guesswork about where to position tabs. These folders come with tabs pre-attached!

Just lift the tab, snap closed, insert your label...you're done. Setting up your files has never been easier.

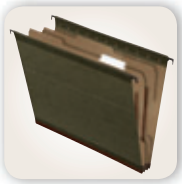
LIFT TAB



SNAP IN PLACE



SLIDE INSERT



### Pendaflex® SureHook® Reinforced Hanging Folders with Dividers

Sub-divided documents for easy categorizing and accessibility. Built-in kraft dividers with 2 sided

fasteners, holds groups of papers back to back on both sides of divider. Available with 1 or 2 dividers in a 2" expansion. Poly-laminate reinforced at top of folder for added durability. Rip-resistant reinforced tape gusset prevents tearing. The 2" capacity has dual fasteners. Includes 1/5 cut clear tabs and 8.5" x 11" printer ready insert sheet.



### Pendaflex® Ready-Tab® Reinforced File Folders

Each Ready-Tab® File Folder has all three tab positions integrated so you can choose the one you want and fold the others out of the way. Tabs are

poly-laminate reinforced for added durability.

SELECT & WRITE



FOLD



INSERT



### Pendaflex® CutLess® and CutLess® WaterShed® Folders

Say goodbye to painful paper cuts caused by file folders. Made from thick stock with a softer edge, can actually reduce paper cut injuries by more than 70%. Protect

your important papers from potentially disastrous damage caused by spills, condensation, or rain. Liquid beads up instead of seeping through, simply wipe away. Can also be written on with pen or pencil.



### Pendaflex® Divide-It-Up™ Multi-Section File Folders

Searching for a document in a standard folder can be time consuming and frustrating. That's why Pendaflex developed the Divide-It-Up File Folder. 3 sections in 1

folder let you sub-divide files into sections that you can access quickly and easily. One large tab lets you identify the folder. Three smaller tabs identify each section and let you find the specific document you're looking for. And, it's sealed on 2 sides so documents won't fall out.

SUBDIVIDE



LABEL



ACCESS



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