

1969

Rought draft

METHODS OF SERIES FILING  
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People who are trying to order their own personal universe, whether at the office or at home, may find the concept of "series filing" of great benefit. The most obvious application is in the area of correspondence but you will see that it can be exploited in many other ways as well:

The basic ingredients of a correspondence application are:

- 1) the log
- 2) the file
- 3) the index

In this system the letters coming in (or carbons of letters going out) are given a number consecutively in a long series beginning over again each year; e.g. 68-001 to, say, 68-872, then 69-001 etc... and they simply added to a folder holding 001 to 100, then a second folder 101-200, etc. With one hundred letters per folder this cuts down on the number of folders. It also means that all the letters get old together --you don't even have to weed out old letters or else face a mess of files ever growing thicker. All letters in and carbons of letters out will be piled into the same series.

However, the first thing that happens to a letter after it gets a number is that it gets "logged". This requires no decisions, no classification, no thinking, no intelligence. A person doesn't have to be highly trained to do this. A twelve-year-old can do it. No danger of a letter getting in the wrong file. The log page is seen in the sample. The columns are as follows:

1. Last name of person to whom the letter is written. If you are the only one in your office this can be a check for your last name. If you get letters from organizations, you can either put the name of the person of the organization. (More later on this)
2. This is the person writing the letter
3. This is the date sent or received. Where you see two numbers this is for incoming letters, and the second number is the date on the letter.
4. In this space some brief characterization is possible.
5. Now the number, as already explained.

After the letters are logged they are simply dumped in the file.

Whether you are doing the logging or someone else is, you can either work from the file or the log. If you work from the file you may want to pull letters out to answer them. They easily can be found find their way back again, they since they bear that magic number. If you work from the log you may want to circle the number as the log of any letter that either doesn't need an answer, or has already been answered. Or, you can put an empty circle next to the number of a letter requiring an answer; when it is answered you can put the number of its answer in that circle.

Now the Index. Some other person can come along later, daily or weekly, and "index" the names in the first two columns of the log. I have a 3 X 5 card file of these names. See sample. If a letter goes from you to John Doe you put the letter's number in the left-hand column, just as the name is in the left-hand column of the log (This is like posting from a journal to a ledger for those who know accounting).

O.K. sample index card.

Handwritten notes and diagrams at the bottom of the page, including a diagram of a 3x5 card file layout and various scribbles.

O.K. what if you get a carbon copy of a letter from Mr. A to Mr. B. Then in the log you'll put B on the left and A on the right, ~~and~~

~~With a difference.~~ Lest you think you wrote the letter to that person, you may wish to add the name of the person (e.g. A) ~~to the letter B's card and the name (e.g. B) of the person getting the letter on A's card.~~ <sup>originator</sup> <sup>recipient</sup> In my file I have people who get or receive about five letters of which I only get carbons to every one I originate or directly receive from them. Nice to be able to spot the one letter you yourself wrote to that person amidst the jumble of copies to and from others <sup>who</sup> you have received with that person's name as sender or receiver.

SAMPLE:

The log is best for the most recent correspondence, but you need <sup>an</sup> the index to get at letters that are a month or so back. The Index card gives you a running history.

What about the case where a person logs both the name of the person and the name of an organization? At the time of indexing you may find the person doesn't have a card. Then you look under the organization. A lot depends on who is doing this. If you are, you will have to decide whether you want to isolate the writer by name (in view of future correspondence possibilities) or if that organization is not one involving a lot of different individuals to whom you will be writing by name.

The system is very rapid once you spy the number of the letter you want to get, whether you see it in the log or the Index, or see it on a letter that needs to go back into the file. This enables you to check the letter itself in a flash, now <sup>since</sup> it is so easy to get it out of a numbered series of letters. This is so simple that you can check a man's index card and go and pull out his last three letters to you in no time. Or, you can flip through the log with the index open to his name and zero in on exactly the letter you are after by checking the description of the letter in the log.

Finally, the little extra initial work in this system more than pays for itself in practically eliminating forever the "lost letter" syndrome. <sup>some</sup> The one thing it won't do is answer the letters! Surprising, though, how much the problem of unanswered letters depends upon easy reference to previous correspondence. Then, somehow, old letters just automatically take themselves off your hands <sup>and</sup> they <sup>mark</sup> work into the past together.

<sup>file</sup> <sup>another handy item w/ this system is that by means of the Index card you have quick reference to the addresses of all your correspondents-</sup>

This leads me to a few observations on other uses of "Series filing." I have adapted the concept to what I call "one-shop projects". Somehow, besides all my routine duties there are always a cloud of additional tasks that get in my hair, litter my desk, and have no place to go while they get done. Now I just slap them in a <sup>series</sup> folder and put a number on it and into a drawer in the file they go. Here, too, there must be a "log" although this doesn't need <sup>as</sup> much space nor all the columns. You just put the number and the name of the job. Each job has its own folder. As these get done you can throw them in the back of the drawer (maintaining numerical order in a second numbered section), and using a yellow or pink shading <sup>marker</sup> to run through the project name on your list. This way of handling avoids the intellectual effort of deciding according to some philosophical scheme where the folder should go.

I use the same system for a speaking file. Any correspondence of papers connected with a speaking date, since you do not usually "carry on" correspondence for more than a short period with <sup>each</sup> a person or church, is set aside from the main correspondence log. This is the one exception. Then these papers also get <sup>od</sup> together. Here you don't need a log, <sup>but</sup> probably an index. The Index will be <sup>in</sup> alphabetical order a stack of 3 x 5 cards bearing names of churches or organizations where you speak. In this case they will simply bear a single date per card. <sup>Where</sup> <sup>this</sup> <sup>is</sup> <sup>especially</sup> important is when you get invited back to speak a second time and you want to know what you said the last time.

Any suggestions or questions will be most welcome. Perhaps this is all in a book somewhere. I have borrowed these ideas mainly from others--whom I would gladly mention if I had not added enough ideas of my own to cast into <sup>dubt</sup> their desire to be given credit.