

Filing System

What is the task?

File/Store/Save document electronically in server.

Why does the task need to be completed?

Record keeping purpose.

Who is in charge of completing the task?

Everyone.

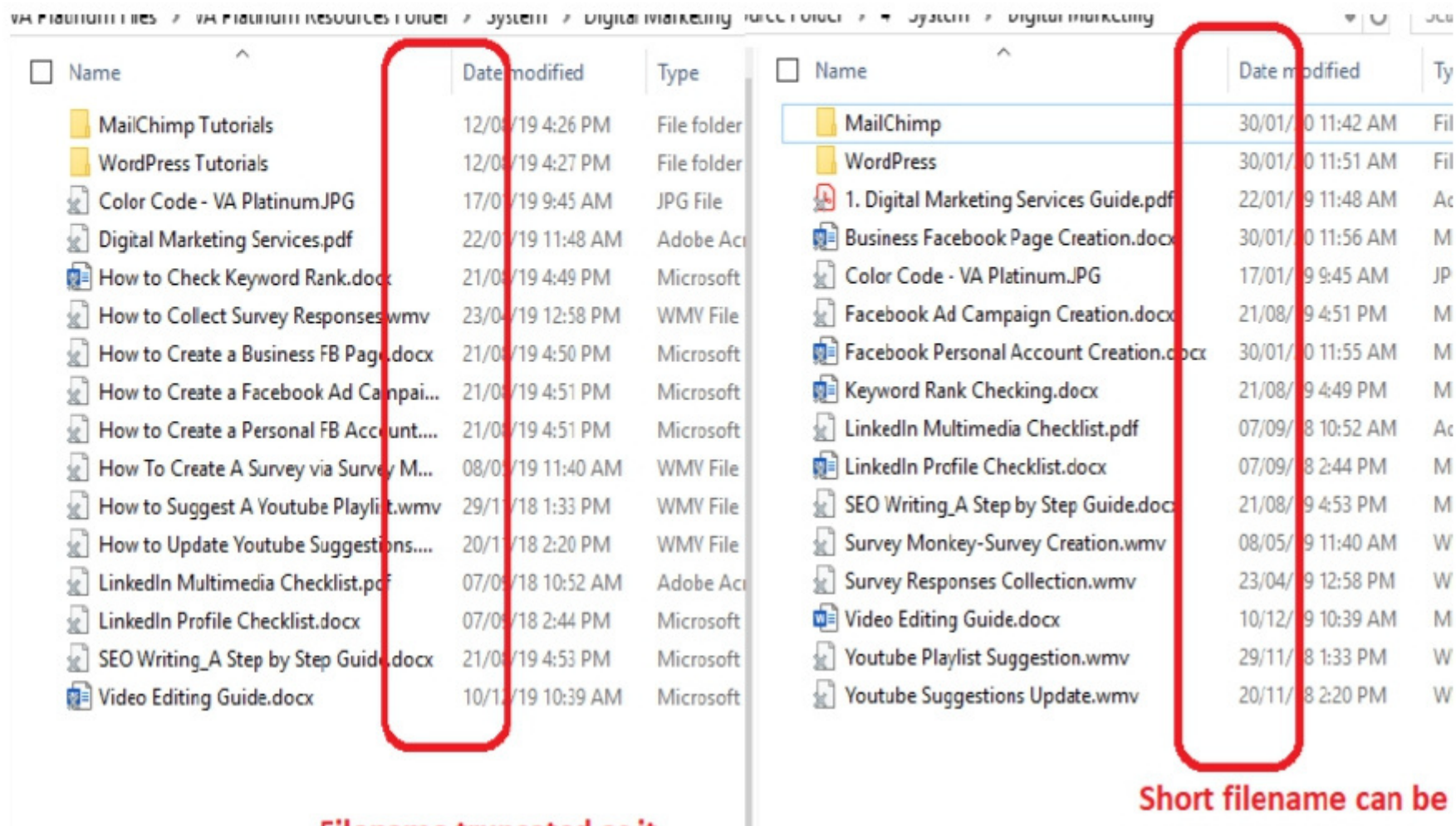
When does it need to be done?

Whenever there is document needed to be filed away/stored/saved for future reference.

How does the task need to be done? Use a video &/or use checklist

- Name the document with **short but precise/clear** description that can best explain the file content. This is so that everyone can easily know what the file is relating to from the file name before opening it.
- Always try to keep the file name short because long file name will often cause issue when the file is copied/ relocated. In addition, short file name allows everyone to easily see the full file name in one view. Comparing to long file name that part of the file name sometimes truncated due to the column size and it is a hassle to have to make adjustment to see the full file name.











- Avoid **unnecessary character/spacing in the file name** if it serves no purpose and there is no impact without it (E.g. Instead of '2014-01-01 - AIA app', just '2014-01-01 AIA app' is better, without '-' in between date and description. The extra character is just extending the file name and extra time is spent for typing it.)
- Sample of some useful short names for document description (see **File Name Conventions** document)
- Depending on the type of the documents, they are stored separately in the below folders respectively.



Name

-  1 - Client Data
-  2 - Reference
-  3 - Template
-  4 - System
-  5 - Other
-  z - old

- Client Data – All client documents. Refer 'File Client Document.docx' and 'New Client Folder.docx' procedures.
- Reference – Any documents that are for reference purpose. A collation of information, usually for a regular task. E.g. Contact sheet, Staff Roles sheet & etc.
- Template – All templates. A template specifies how to present certain information in a pre-set/standardised layout.
- System – All procedures on how to perform a task/do something.
- Other – Any other documents that do not fit any of the above category. E.g. Ad hoc report or Ad hoc project's document
- Old – All old documents that no longer in use but might be revived in future.

