

Managing your documents – A guide to good practice

Good practice is what makes life easier for you and your colleagues. For example, you are asked to edit a document, and given a printed copy of it. Can you work out from the printed page where to find the document?

This document contains some ideas about good practice with your documents, so that you can do more with less effort.

1. Record the file name at the end of every document. Use a macro to insert a standard set of information, eg document name with the full path, plus the date it was last updated.
2. Standard styles. Use styles to choose particular combinations of fonts, setting bold and underline and margins. Get these things organised once and for all. Use them from the toolbar or via buttons to use your styles with a single key press.
3. Organise your folders. Make sure that everyone in a department keeps their documents in the same common set of folders, with an organisation of folders based on the needs of the group.

Examples:

A client of ours works for many of the UK blue-chip companies. They maintain one folder per client. Everyone who does work for that client saves their work in that client's folder. That way, anyone can find any document addressed to that client or about that client. If there are a number of projects for a client, that client folder is sub-divided by project.

Another client is a television production company. Their baseline is a television series, so each series has its own document folder. Within that there are folders for topics such as finance and production. Within production there could be folders for each company involved with the production.

By way of contrast we have seen clients filing their documents by the name of the person working on them, eg 'Fred's files', 'Samantha', and so on. This might be easy, and it might appeal to the individual, but it is almost impossible to find all the documents for one particular client or for one project.

Keyword

Organise
Good practice

Sending mailings to groups of people

Problem

How do you send a mailing to a group of people, without everyone seeing an enormous list of recipients?

Applies To

Microsoft Outlook
Microsoft Exchange Server

Solution

Use *blind carbon copy*, or BCC, to send to the list of people. Put your own address in the *To* field, so that the e-mail has something in that field.

Thanks to the Online section of the Guardian, 7 June 2001, for additional information for this item (www.guardianunlimited.co.uk).

Key words

Microsoft Outlook
Microsoft Exchange Server