

STORYBOARD: RISE Course

Training Topic: 3 Steps to Organizing Digital Files

Business Challenge:

There is no standardized system for organizing digital files causing delays in document retrieval, sharing incorrect file versions, and the ability to share files efficiently across departments.

Performance Goal:

Secretaries will implement a standardized digital filing system with 80% accuracy to allow for fast and accurate retrieval of files.

Target Audience: Secretaries new to their role within the last 3 years

Training Components:

- eLearning Course - RISE
 - Job Aid
-

Learning Objectives:

- **Lesson 1:** The learner is able to **implement** a process for locating and deleting unwanted files.
 - **Lesson 2:** The learner is able to **create** folders and subfolders using a clear hierarchy.
 - **Lesson 3:** The learner is able to **create** a consistent naming system for files.
-

Font

Headings: Inter
Body: Inter

Color

Brand Color: #285F9F (dark blue)

Accent Color 1: #4BAAF4 (bright blue)

Accent Color 2: #FDF9F9 (light grey)

CONTENT OUTLINE

	LANDING PAGE
LANDING PAGE	<p><u>Title:</u> 3 Steps to Organizing Digital Files</p> <p><u>Overview:</u> In this course participants will learn how to create a standardized digital filing system to allow for fast and accurate retrieval of files.</p> <p>Stock image: Person typing on laptop</p>
	INTRODUCTION SECTION
WELCOME	<p>Heading with Paragraph Block</p> <p>WELCOME</p> <p>In this course you will learn how to organize digital files using some standard practices that can be implemented across your organization. Below are the 3 steps you will go through to organize your digital files.</p> <p>List Block</p> <ol style="list-style-type: none"> 1. Delete unwanted files 2. Develop a hierarchy system for naming folders and subfolders 3. Develop a naming system for digital files
	STEP ONE: DELETE FILES
LESSON 1	<p>OBJ: Not visible to the learner</p> <p>The learner is able to implement a process for locating and deleting unwanted files.</p> <hr/> <p>Present the Learning Goal</p> <p>Image with Text Block</p> <p>Upload image from file</p> <p>Heading: Tidy Up!</p>

Paragraph: Before you start renaming files, you need to delete the files that you no longer need.



Present the Content

Subheading with Paragraph Block

Subheading: Delete Files

Paragraph: There are three things to look for when deleting files. Select each tab to learn more.

Accordion Tab Block

Upload Images from file


Tab 1: Duplicate Files

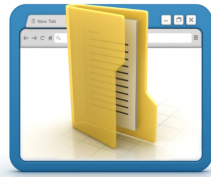
Duplicate files happen for a couple of reasons. Files are sometimes downloaded twice (or multiple times) causing your device to automatically save the duplicate with a (#). In the example below the same document was downloaded 3 times.



Tab 2: Out-of-Date Files

It is likely you have accumulated files that are no longer needed. For example, a requisition form has been updated making the old version out-of-date. You should delete these types of files so they are not accidentally used in the future. In the example below the company's travel request form has moved to a fillable version.

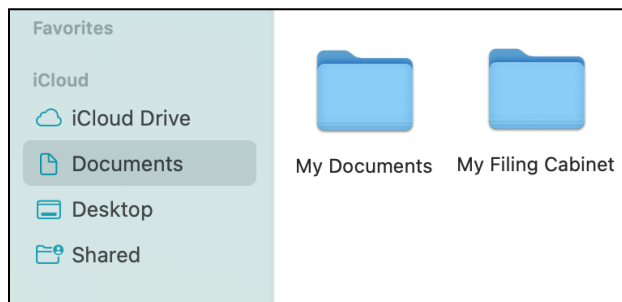
	Continue Divider Block
	STEP TWO NAME FOLDERS
LESSON 2	<p>OBJ: Not visible to the learner The learner is able to create folders and subfolders using a clear hierarchy.</p> <hr/> <p>Present the Learning Goal Image with Paragraph Block Upload image from file Heading: Get Organized! Paragraph: A clear digital folder structure makes it easier to store and retrieve files, and helps promote collaboration with an organized way of sharing information.</p>  <hr/> <p>Present the Content Paragraph Block Read about the steps to create a hierarchy for streamlining your digital folders.</p> <p>Process Block Start Page Title: Create Digital Folders Paragraph: Read about the steps to create a hierarchy for streamlining your digital folders.</p> <p>Upload image from file</p>



Upload Images for each step from File

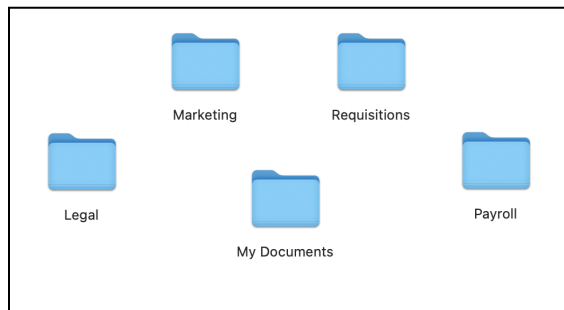
Step 1: The Filing Cabinet

First, create a single folder that will contain all files. This is your digital filing cabinet. Many use the My Documents folder that is setup by default or you can create a folder called My Filing Cabinet.



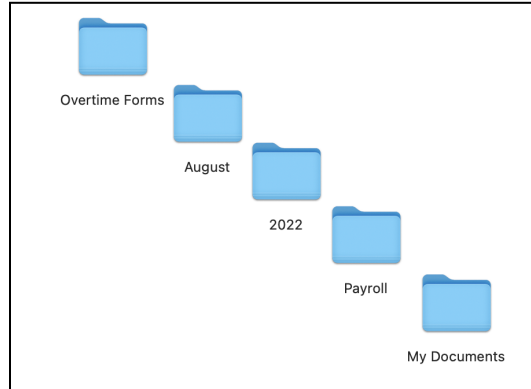
Step 2: Major Topics

Next, review your digital files and write down topics that apply to the types of digital files you save. You may have topics such as: Accounting, Legal, Marketing, Operations, Projects, and Personal. These topics become your primary list of folders under your My Documents or My Filing Cabinet folder.



Step 3: Create Categories

Once you identify your major topics, you will need to break them down into smaller categories called sub-folders. Categories may be related to date, specific people, or specific projects.



Summary: Remember to limit your primary folders so that items are grouped in a logical manner. You will probably need to add more subfolders with your workload.

Summary stock Image: computer with folders

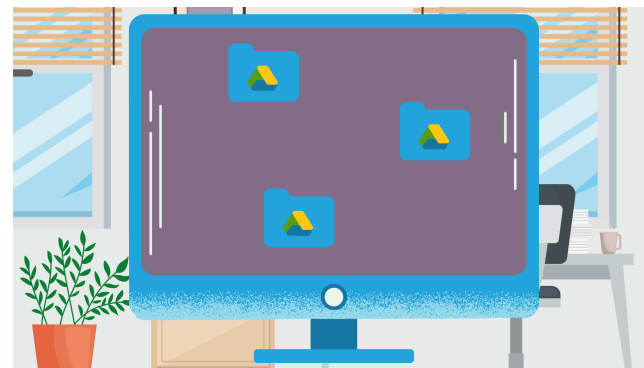
Exercise

Paragraph Block

Let's look at how this all works together. Select each hotspot to learn more.

Labeled Graphic Block

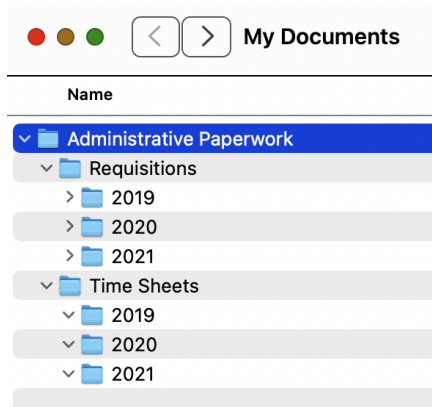
Upload images from file



Hot Spot 1:

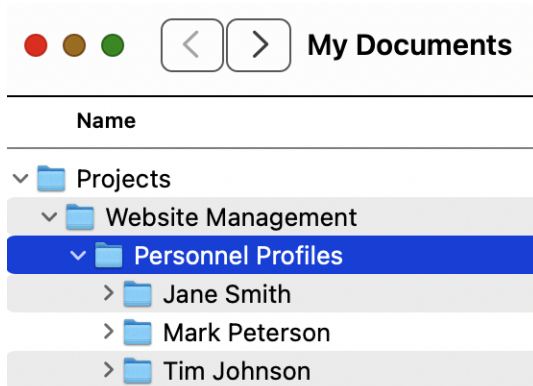
In this example you can see the secretary created a primary folder called Administrative Paperwork. In this folder there are two categories: Requisitions and Time Sheets. Within each category

there are subfolders organized by years to keep files in timeline order.



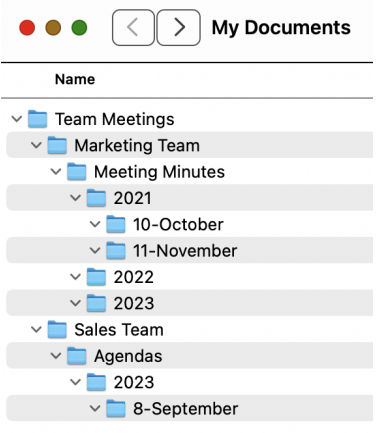

Hot Spot 2:

In this example you can see the secretary created a primary folder called Projects. In this folder there is one category so far titled Website Management. Within this category there is a subfolder called Personnel Profiles and within this subfolder there are more subfolders for each staff member's profile information.



Hot Spot 3:

In this example you can see the secretary created a primary folder called Team Meetings. In this folder there are two categories: Marketing Team and Sales Team. Then you see subfolders for meeting minutes and agendas. Next there are subfolders organized by year and month. Notice the # is in front of each month to keep them listed in order.

	 <p>My Documents</p> <p>Name</p> <ul style="list-style-type: none">Team Meetings<ul style="list-style-type: none">Marketing Team<ul style="list-style-type: none">Meeting Minutes<ul style="list-style-type: none">2021<ul style="list-style-type: none">10-October11-November20222023Sales Team<ul style="list-style-type: none">Agendas<ul style="list-style-type: none">2023<ul style="list-style-type: none">8-September
STEP THREE NAME FILES	
LESSON 3	<p>OBJ: Not visible to the learner</p> <p>The learner is able to create a consistent naming system for files.</p> <p>Present the Learning Goal</p> <p>Image with Paragraph Block</p> <p>Upload image from file</p> <p>Heading: Name it!</p> <p>Paragraph: Now it is time to decide on a naming pattern based on the file type and stick to it. Make sure to write down your file naming system for future reference.</p> 

Present the Content

Paragraph Block

Before renaming your files, follow the steps below to make the process easier.

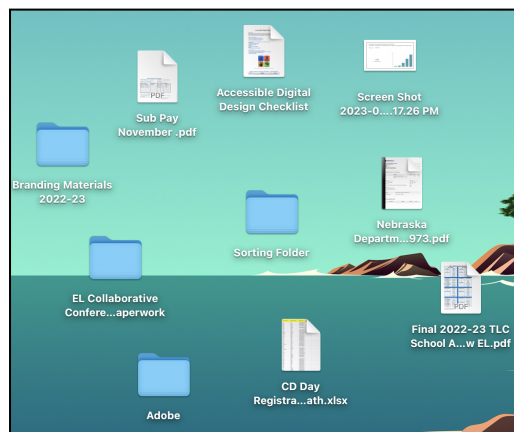
Timeline Block

Upload images from file

Step 1

Sorting Folder

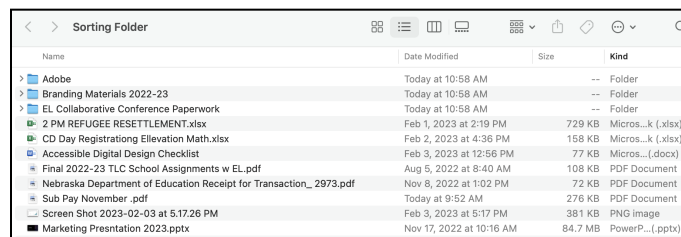
Create a folder named **Sorting Folder**. Gather all unorganized digital files and folders into this folder.



Step 2

View by File Type

View your Sorting Folder by file type. This allows you to see all of your files grouped by JPG images, PDFs, DOCs, XLSS, PPTs, MP3s, etc. Using this view will help you gather, contain, label, and create a home for files quickly.



Subheading with Paragraph Block

Subheading: Name Digital Files

Paragraph: Decide on a naming system. Write it down and stick with it. File names should include enough information so that the file can be located, identified, and retrieved quickly. Read about the parts to naming a digital file below.

List Block (Use checkbox option)

- File names should include:
 - Title
 - Date
 - Version #
- Use the format Year-Month-Day (four digit year, two digit month, two digit day)
 - YYYY-MM-DD
 - YYYY-MM
 - YYYY-YYYY
- Start with the date if it's significant to the sorting order such as for agendas and meeting notes
- Use underscores (_) as a separator between naming elements instead of a space.
 - 2023_03_26_Agenda
- Include the version number by leading with zero for numbers 0-9 (v01)
 - 2019_Requisition_Template_v03

Paragraph Block

When deciding the order of the elements, date first will usually be appropriate for events that are time specific and recurring. Event first will usually be appropriate for events that are infrequent.

Image with Paragraph Block

Upload image from file

Heading: Take a Close Look

Paragraph: Can you see how the naming system rules were applied to this file name? Consider how the title, date, and version elements were applied.



Exercise

Paragraph Block

Using the rules above, sort these file names into Correct and Incorrect Groups.

Sorting Block

Correct:)	Incorrect:(
Office_Procedures_v01	Office Procedures v2
2007-01-20_Minutes	Agenda_ 20_Jan_2007
Award_Ceremony_2006-06	Donor_Reception_05-2009
Org_Chart_2006_v03	Org_Chart_Update_2-3-21

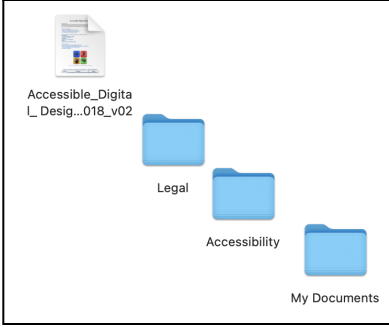
Summarize and Bridge

Image with Text Block

Upload image from file

Heading: Pro Tip!

Paragraph: As you rename your files, drag them into the appropriate folder or subfolder. Depending on the number of files you have, you may need to schedule time on your calendar to work until the process is complete.

	 <p>Paragraph Block Now it is time to see what you learned! Continue Divider Block</p>
KNOWLEDGE CHECK	
ASSESSMENT	<p>Image with Text Block Stock Image: typing on laptop Make a link to the Job Aid PDF File Heading: Show What You Know Paragraph: Answer the questions below using the knowledge you gained from this course. Download the Organizing Digital Files Quick Guide to refer to as needed. Multiple Choice Blocks (6)</p> <ol style="list-style-type: none">How can you identify a duplicate file?<ol style="list-style-type: none">The file will usually have a number after the nameThe file will usually have dates after the nameThe file will usually have a letter after the name<p>CORRECT FEEDBACK: Great! You know how to spot duplicate files. INCORRECT FEEDBACK: Not quite. Remember the file will usually have a number after the name.</p>If you need to save an old file for documentation you should<ol style="list-style-type: none">archive the file in a back-up locationkeep the file in the same place as the updated filemake a new folder and file it there<p>CORRECT FEEDBACK: Yes! Archive to a back-up location. INCORRECT FEEDBACK: Oops! The best way to save an old file for documentation is to archive it.</p>Why should you delete out-of-date files?

	<ul style="list-style-type: none"><ul style="list-style-type: none">a. to avoid using the incorrect fileb. to save space in the folderc. to ensure you have enough memoryCORRECT FEEDBACK: You are right! Delete out-of-date files to avoid using the incorrect one.INCORRECT FEEDBACK: Not quite. You should delete out-of-date files to avoid using the incorrect file.4. What is the first step in creating folders?<ul style="list-style-type: none">a. Create a single folder that holds all other foldersb. Create topic folders based on the types of filesc. Create folders by date in order to organize yearlyCORRECT FEEDBACK: Yes! The first step is to create a single folder titled My Documents or My Filing Cabinet.INCORRECT FEEDBACK: Oops! The first step is to create a My Documents or My Filing Cabinet folder to house all other folders.5. What is an example of the correct hierarchy for digital folders?<ul style="list-style-type: none">a. My Documents > Marketing > Agendas > 2023 > Juneb. Marketing > My Documents > Agendas > 2023 > Junec. Agendas > 2023 > June > Marketing > My DocumentsCORRECT FEEDBACK: That is right! This hierarchy makes the most sense.INCORRECT FEEDBACK: That's not right. The hierarchy that makes the most sense is My Documents>Marketing>Agendas>2023>June.6. What is an important step to take before beginning the process of organizing your digital files?<ul style="list-style-type: none">a. Create a Sorting Folder and drag all files insideb. Open your old folders and drag files onto your desktopc. Drag all of your files into your My Documents folderCORRECT FEEDBACK: Exactly! This will keep track of what files you have and have not sorted.INCORRECT FEEDBACK: Sorry that is not correct. Creating a Sorting Folder first will help you keep track of what files you have and have not sorted.7. Which is an example of how to correctly name a file?<ul style="list-style-type: none">a. 2023_06_Requisitions_Smith
--	--

	<p>b. Requisitions_2023_June_Smith c. 06_23_Requisitions_Smith CORRECT FEEDBACK: You have it! This is an example of a Date First file name. INCORRECT FEEDBACK: Oops. Remember to use date formats of YYYY_MM_DD, YYYY_MM, or YYYY_YYYY</p> <p>8. When would you use Event First order in a file name? a. when an event or file is infrequent b. always start with the event first c. when an event or file is time specific CORRECT FEEDBACK: Yes! Use Event First order when an event is infrequent. INCORRECT FEEDBACK: Not quite. Use Event First order when an event or file is infrequent.</p> <p>Continue Divider Block</p>
	<p>SUMMARY</p>
<p>SUMMARY</p>	<p>Paragraph Block Add Link: Organizing Digital Files Quick Guide In this course you learned how to delete unwanted files, create a folder hierarchy, and create a naming system for your digital files. Now it's time to take action. Remember to use the Organizing Digital Files Quick Guide to refer to along the way. Thank you for participating. This concludes the course. Please take a moment to complete the brief survey below about your learning experience.</p>
<p>LEARNER FEEDBACK</p>	<p>Embed Block: Google Form Embed Link: <code><iframe src="https://docs.google.com/forms/d/e/1FAIpQLSd8z0mAt_yUra4kPuZjJDeEzo_5JVPOscNi0SPHrVS6ciD50w/viewform?usp=sf_link"></iframe></code> 1. How relevant did you find the information? Scale 1-not relevant/5-extremely relevant 2. How engaging did you find the information? Scale: 1-not engaging/ extremely engaging 3. How satisfied were you with the information? Scale: 1-not satisfied/ 5 extremely satisfied</p>

	<p>4. Please provide any additional feedback below. (Optional) Continue Block "Continue to View References"</p>
	<p>REFERENCES</p>
<p>REFERENCES</p>	<p>Subheading and Paragraph Block Subheading: References Paragraph: Below is a short list of references that were used to develop the content in this course. You may want to check these out to further your knowledge. List Block (bullet Points)</p> <ul style="list-style-type: none">• Princeton University Library - Research Data Management• York Information and Privacy Office - Naming Conventions for Electronic Files and Folders• Dropbox - Digital File Management Tips• Textexpander - 5 Steps to Declutter Your Digital Life• All Things Admin - The Admin's Guide to Organizing Digital Files• Industrious - 4 Tips to Organize Your Digital Office• LinkedIn - The 8 Benefits of a Good Filing System <p>Subheading This is the end of the course. You may close your browser.</p>