CASE STUDY

A WELL-DEFINED ONLINE FILING SYSTEM WILL ALLOW FOR FUTURE GROWTH AND MORE STRUCTURE

Blue Ninja was approached in the last quarter of 2019 to assist a company to move all their documentation fully online. The team had no clear structure to share files and much of what they used regularly was printed.

CHALLENGE: We were tasked to create an online filing system that was not only clear and simple for the team to use, but also needed to be robust enough that it could be expanded and adjusted with ease in future.

Much of the information had been developed by people either no longer in the business, or by the Director who had little time to spend on finding files. However, the Director was very supportive of giving this project the attention it needed to be carried out properly.

Some information had been duplicated in a number of places so there had to be some procedure to check the documentation and make sure the latest version of the record was used.

INSIGHTS: The project had a primary contact from both the client and Blue Ninja. This made the process much more efficient as it meant questions could be followed up easily and the project could move ahead without delay with a direct line of communication.

Any questions for the client and Director were requested via the primary contact, although the Director also sent through updates directly to Blue Ninja as she had thoughts and requests for what she wanted added to the filing system as the project progressed.
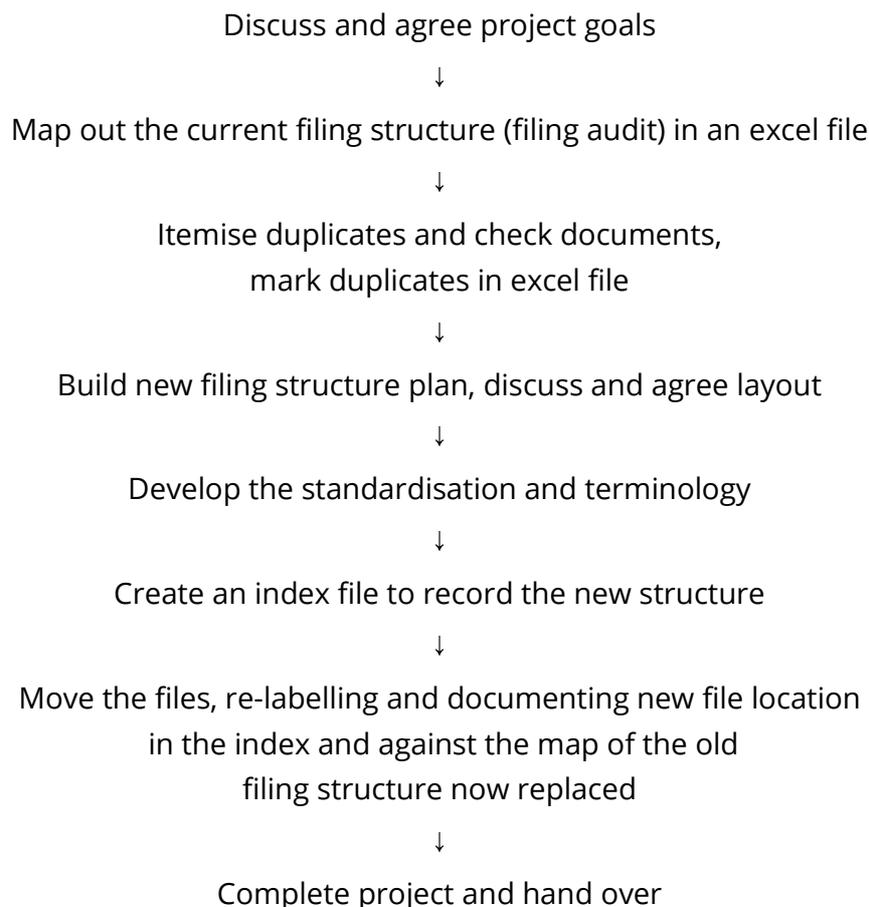
At the beginning of the project Blue Ninja were advised that all the files that were part of the project needed to be mapped out in the order they were originally filed. This was to make sure that the records could be clearly documented where they were at the start and eventually where it would be refiled. If the team needed to find a document quickly during the process, this meant the file could be easily located.

The team had regular progress calls with the client, however Blue Ninja were given a lot of flexibility to create the new structure based on their interpretation of the information already in place. The file mapping helped us to look at the old structure and also guided us on what groupings of information currently existed. We wanted to make sure the filing structure was logical and did not have too many levels.

SOLUTION: The delivery of the new filing structure covered approximately 500-600 documents that Blue Ninja were given access to. The structure had 7 primary folders (labelled alphabetically) and between 6-12 secondary folders within each, depending on the type of information grouped. Sub-folders were avoided wherever possible to limit the variations to the filing structure.

The steps we took were as follows:

Discuss and agree project goals

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Map out the current filing structure (filing audit) in an excel file

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Itemise duplicates and check documents,
mark duplicates in excel file

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Build new filing structure plan, discuss and agree layout

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Develop the standardisation and terminology

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Create an index file to record the new structure

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Move the files, re-labelling and documenting new file location
in the index and against the map of the old
filing structure now replaced

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Complete project and hand over

Although there appears to be a number of steps defined in this process, it was essential to keep the client lead informed only when necessary,

and allow Blue Ninja the flexibility to make decisions based on what was discovered within the documentation as the project moved forward.

A key element was to make sure the standardisation and terminology was clearly defined. With the client's needs in mind, the filing code reference number was kept simple and logical. The reference number allowed the team to add new documents and archive older files easily, as well as transfer the structure to a new office, if they expanded.

A version number was also used in the reference number to make it easy for the team to see when updates were carried out. The documents that were regularly updated would have a higher version number than those that have not, which would help when annual audits took place and/or for archiving.

During the progress of this project, a second filing system was requested to be prioritised part way through the project. Although not intended, it allowed Blue Ninja to test how documentation could be relocated between the two systems and evaluate how flexible the documentation needed to be. We did not use the same filing structure for the second filing system as there was already a structure in place, so a different reference number was created. The standardisation was still used, which made it very quick to convert a file from one filing system to another as many files were transferable between both.

The client trusted Blue Ninja to completely redesign their filing system with a clearly defined goal. They wanted something that could be used as a long-term solution, with a robust structure that could expand whenever they were ready. By allowing time for a filing audit to be completed, it meant the client's primary contact could identify old files to be archived and allow us to focus on the essential and important files that would be needed moving forward.

This was a successful filing structure delivery for Blue Ninja and one where the client was very pleased with the result which has resulted in further work being requested by them.