



Personal Filing System

Application Note AN-1

by Christopher Moore

In this application note, I'll describe a personal filing system that I have used during most of my career. Despite its simplicity, the system is worth a more detailed look. Even if you already maintain a personal filing system, you will still find some useful ideas here.

Benefits

Admittedly, it takes time to set up and maintain a personal filing system. So why go to the trouble?

- You already spend time perusing current literature. It doesn't take that much more time to capture the useful information you see.
- The sheer quantity of new information crossing your desk prevents you from reading it as it emerges, but filing makes it accessible.
- You will be able to search current literature at home, with full text and graphics, and retrieve several perspectives on the project at hand.
- You can use your file to help associates and subordinates find references of use to them.

How it works

Whenever you read or scan current literature, you flag articles of interest to you. The articles are clipped, categorized, and filed in folders. When you tackle a project or design challenge, you scan your category list for the appropriate folders, pull the folders, browse, and use the relevant articles.

Establishing a personal filing system

Begin by listing the areas of technology or knowledge that are important to you in your work. Consider not just the ones you currently use, but the emerging disciplines that may be important in the future. Identify the broad areas of technology, and develop a list of major categories. To get you started, here are the major categories that I have developed over the years. I prefaced each category with a two letter mnemonic:

- AU Audio & Analog Circuits
- DA Digital Audio
- DD Digital Design
- CK Circuit Design
- CO Components
- MT Miscellaneous Technical
- BU Business

SW Software

Next, break the categories down into subcategories. Make these only as fine as you think will really be helpful. Don't expect to create all the subcategories, or even all the categories, at the first sitting. Your filing system is dynamic and will evolve over the years. The best time to identify subcategories is when you are reviewing the clippings and marking them for filing. Here are some examples of subcategories from my DA (Digital Audio) category:

- DA5 PCM Audio Recording
- DA6 Digital Filters
- DA6A Digital Audio EQ
- DA7 FFT, Hartley, Wavelet
- DA8 ADC Design
- DA8A DAC Design

The mechanics of the system are straightforward--you will need filing space, file folders, file folder labels, etc. I use laser printer folder labels and maintain the category list as a text file so I can print a reference sheet and folder labels. You will find the items for your file in magazines and journals, manufacturers' application notes and data sheets, conference papers, graduate student theses, and your own personal design notes.

Maintaining the system

From now on, you should discipline yourself to not sit down and browse through a periodical unless you are prepared to flag the articles you wish to add to your library. As you read through a magazine, mark the starting page number of each article you want to save on the back of the periodical. I use a red china marker (this will write even on glossy black magazine covers) if the periodical is my property, or a pen and Post-Its if it is not. If you notice that two or more articles have some shared pages, use a Post-It to alert your assistant later on. If the periodical is your personal copy and you are going to discard it eventually, put it in a stack for future clipping. If you intend to save the periodical whole (as I do with Audio Engineering Society Journals), or if it is not your copy, have your assistant use a copier to extract the articles you flagged.

While only you can scan the periodicals and assign subcategories to your clippings, you should seek a helper to do the actual clipping and filing. My helper is a neighborhood high school student. Wait until the stack of periodicals is one or two feet high before having your helper do the clipping. The pages

should be assembled with text side up, in the correct page order, and with any intervening pages of pure ad copy deleted. Articles should be stapled.

When the stack of clippings is 3--4 inches high, sit down with your category reference sheet and assign a subcategory to each article. This is also a good time to spot something that you really do want to read in more detail right now.

Now give the clippings back to your assistant for filing. That's all there is to it.

Why not computerize this system?

Clearly, this system would be more powerful if all the material, text and graphics, were stored on line in a computer database with full search and retrieval. The search time would presumably be greatly reduced and the search itself would be more thorough. However, from what I've seen, it is not practical yet for an individual to implement such a system. In fact, it's my impression that it is not even practical for corporations yet.

Of course, there are on-line information databases such as Dialog. They have the advantage that they cover many more disciplines than a personal system ever could. There are also electronic "clipping services" which will search each month for articles matching your keyword list. If these are available through your company, they are worth looking into.

Personal file system

You should strongly consider maintaining this library at your own expense and at your home. You are developing a lifelong reference library tailored to your interests and career. Because your library is so personalized, it may be of little interest or use to your company. If you do decide to maintain this system as a personal file, be sure to make this clear to your supervisor at work before you use any company resources to assist you.

Other applications

If this system is useful to the individual, why not to engineering departments? An engineering manager who invests the time to set up a system like this will create a valuable company resource. He and his staff can all feed the system with articles, while administrative help can maintain the system as part of the engineering library.

You can expand your system to cover non-career areas--hobbies, art, music, literature, family history, health, finance, etc.

Tips and suggestions

- Keep your system manageable and simple. Don't overdo it: it's a tool, not an end in itself.
- File copies of the title pages of important articles from the periodicals which you save intact.
- File copies of portions of books that you want to be able to locate again.
- Take unread magazines and clipping tools on trips. Read and clip on the spot and discard the bulk of the magazines.
- You can easily stuff a 3/4" stack of your unsorted clippings into your brief case for more leisurely reading on plane trips.

- My system is broken down into 8 categories and 210 sub-categories and resides in 8 file drawers. It has been evolving over about 24 years.
- As you browse through articles within a subcategory, group them into finer subcategories and clip them together.
- Be on the lookout for misfiled articles, or articles where you yourself made an error in the subcategory.

Mission statement of Seven Woods Audio

I am an electrical engineering consultant specializing in the conception and design of products and circuits used in audio applications. My company, Seven Woods Audio, is committed to helping manufacturers quickly create digital or analog audio products that generate a good return on investment, work right the first time, sound excellent, and please the end user. Seven Woods Audio works with manufacturers of professional audio, consumer audio, broadcast, telecommunications, and computer equipment.

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