

# paper systems planning worksheet

**Type of System:** \_\_\_\_\_

(action, reference, or archive)

## Step 1: Decide how many systems you need.

For each type of paper system you set up (action, reference, and archive) decide how many of each system you need. For example, you may decide that you need three action systems—a tickler file, a reading basket and a shopping + errands center. In the space below, list the systems you will be setting up, along with which specific papers will be stored in that system. Refer to Lesson 2, the papers in your temporary sorting container, and your “paper, paper, everywhere” handout to decide which systems you need to create and what papers will be stored in each system.

## Step 2: Select your storage solution.

Remember to select storage based on characteristics. In the space below, make notes about which characteristics will work best for your particular paper system.

**Location:**

**Open versus Closed:**

**Portable versus Stationary:**

**Horizontal versus Vertical:**

**Capacity:**

**Adaptability:**

**In-place versus Loose:**

**Aesthetics:**

### Step 3: Develop Your Organizing Scheme

In the space below, list the categories you will use for this particular application. Or create your categories as you go, using the process outlined in the lesson.

### Step 4: Identify the habits needed to use the system effectively.

In the space below, list the habits you will need to create (and possibly break,) to use your new paper organizing system effectively. Refer to the lesson handout for ideas.