**1.5 Organizing files**

In some consulting settings in a given year you may deal with many investigators, several projects per investigator, and several visitations to each project. You need a way of keeping track of emails, datasets, meeting notes, etc. so you can find them months or years later, and you need to easily find the most recent work. This takes time so you need to allocate some time for it.

Paper-free is a good goal, but some things like equations and meeting notes are easier to write. The two solutions I know of are a) handwrite, scan or photo, and file electronically, and/or b) carry a notebook for such things.

For naming folders and files, I use folders for main groups (e.g. VA, Nutrition, Biostat, etc.). Inside each of those I have folders for each project or investigator name, and inside those folders for specific projects. Inside each specific project folder I have dated folders for each time I work on the project. I use names like “2019-08-27” so they sort by time and the most recent are always the last. So for example a typical folder might be

*Gary/VA/Paul/PCI appropriateness/2019-08-27*

Inside that folder I put datasets, documents I create, etc. as well as copies of important emails from or to the investigator (usually in notepad files). I try to name documents with project, date, etc., again using the date format year-mo-dy.