

Get Control![®]

Organize Your Digital Office



GET ORGANIZED!
HANDOUT

**File and Find
Everything Fast**

1) SET UP BROWSER POWER LINKS

BROWSER ORGANIZATION GOAL: 10X MORE POWER LINKS

ACTIVATE BOOKMARK BAR: Click *Control + Shift + B*

AUTO-LAUNCH TOP 3 LINKS: Click *Browser Settings > Start or Launch > Add 3 pages*

PULL DOWNS SHORTCUTS: Left-click on the *small icon* to the left of any web page URL > Drag and drop it down to the bookmark bar > Add 10 high-use web pages

CREATE BROWSER FOLDERS: Right-click on *Bookmark or Favorites bar > Add folder*

ADD BROWSER SUB-FOLDERS: Click into browser folder > Right-click > *Add folder*

RENAME LINKS & FOLDERS: Right-click on links or folders > Edit > Rename to shorten

CAPTURE M365 LINKS: Open any M365 document > In upper-right corner click *Share Arrow > Select Share Options > Click Copy Link > Paste link into browser > Pull Down*

ADD EMAIL FOLDERS: Go to *office.com* > Open the browser version of Outlook Mail > Create email folder and add email to it > Pull Down weblink to Power Link Folder

2) ORGANIZE YOUR DIGITAL TOOLS

ORGANIZE WINDOWS TASKBAR: Click *Windows Start Button* in lower-right corner > Scroll to top apps > Drag high-use apps to the Lower Windows Taskbar.

Bonus: Right-click on apps in the toolbar to shortcut to recently used apps.

QUICK ACCESS TOOLBAR: In the upper-left corner of any desktop M365 app, find the small triangle - Dash icon and select *Show Below Ribbon*. Then add high usage and easy-to-forget tools for that app by right-clicking on them and selecting *Add to Quick Access Toolbar*. In Word, Click *Insert > Quick Parts* and add to QAT.

BOOKMARK 365 TOOLS: From your browser > Go to the Microsoft 365 office.com home page > In the upper-left part of the screen click the *9 dot* "Waffle" button > Click *All Apps* > At the bottom of the menu click *Explore all your apps* > Bookmark key apps like Planner, Forms, or Sway to boost visibility.

365 RENAME & VERSION CONTROL TOOLS: At the top of any 365 document stored within OneDrive or SharePoint, Click on the down arrow by the title to instantly rename that document or change versions. Bonus: Use f12 Tool to save fast.

3) CREATE A SIMPLE SYSTEM VIA MASTER FOLDER MAGIC

CHUNK YOUR DIGITAL WORLD: When your document or email storage system has 50-100 folders, it takes tremendous mental energy to remember where things should be stored. There is tremendous overlap. When you use 4-5 Master Folders, it simplifies every file and find decision.

DEVELOP YOUR MASTER FOLDERS: If note, make a list of all the kinds of things you will store for work only over the next 2-5 years. Try to sort those things into four, logical buckets. Create master folders from your buckets. Number your folders to create a consistent order. Then, click and drag existing folders into those four folders.

CREATE SHORTCUTS: From File Explorer, drag your master folders into the *Quick Access* Shortcut area. You can also create browser shortcuts to each folder via OneDrive, SharePoint, or Google Drive using the Pull Down technique described above. See below for a powerful way to use the Lower Windows Taskbar to create even faster navigation to your information.

4) USE INCREDIBLE FOLDER & DOCUMENT HACKS

USE NUMBERS TO PRIORITIZE: Add a number to the name of any high usage file in order to make it pop to the top of the list. Numbers can reflect a sequence of events or for version control. Add ZZ to a title to move the file to the bottom.

CREATE ZZ POWER DRAFT FOLDERS: Determine repeat folder categories. Create a ZZ Power Draft folder containing useful sub-folders. Copy & rename the folder to create consistent, well organized folders.

CUT CLUTTER VIA ZZ ARCHIVE: When you're nervous about deleting outdated content, create a ZZ Archive Folder and drag items into it.

USE DESCRIPTIVE NAMES: Add more detail and description to every file you name. Ask, "*Would a new hire understand what this document contains?*"

DATE STAMP VERSION CONTROL: When naming files, use a year, month, and date prefix for locking in the exact time that you encountered or created that document. Example: 19 04 23 Anvils vs. Widgets Report

20 05 10 Widgets vs. Anvils Report

ABOUT COTA: A UNIVERSAL ORGANIZATION SYSTEM

The COTA System simplifies organization. COTA categorizes information based on how it relates to you. The COTA folders mirror the nature of work. You will always be on a **TEAM** that delivers **OUTPUT**, to at least one **CLIENT**. **ADMIN** info is necessary in any job. The **universal nature** of COTA categories ensures that anyone, in any job, can use it. In fact, you can use it for the rest of your career -- even if you change jobs.

COTA MASTER FOLDERS ARE FOR WORK INFO

1 Clients: Clients use and evaluate your team's products and services. Clients can be external customers or internal groups or divisions that your team services. Generally speaking, COTA Clients are the ones who judge your team's final product or service.

2 Output: Output is the main thing your team creates and delivers. For instance, salespeople provide brochures, demos, and trials to prospective clients. A corporate IT team provides PCs and software to the rest of the divisions in the organization.

3 Teams: Almost every employee is placed on team. Create sub-folders including all teams, group roster, business plan, meeting notes, and if you're a leader, you may have sub-folders for each member of your group.

4 Admin & Miscellaneous: In addition to primary responsibilities (Output), every employee needs to keep track of generic administrative info. For example, your benefits, general organization guidelines, parking info, and expense reports. Create a final master folder for your personal info.

HOW TO CREATE THE WINDOWS ZIP ZONE

*Visit www.getcontrol.net/free for icons & how-to video.



ZIP ZONE FOR PC USERS

1. Right-click on the lower, Windows toolbar, just right of center
2. Make sure **Lock the Taskbar** is not checked > Right-click on the toolbar and click on **Toolbars > Links**.
3. A dotted bar will appear with the word Links next to it in the lower right corner > Click and drag the **Links bar** to the left to create space.
4. Right-click on the word **Links** and uncheck **Show Text** > Right-click on **Links** again and select **View > Large icons**.
5. Drag and drop COTA Master folders, documents, files, and websites to the Zip Zone. Release when you see **+Copy to Favorites Bar**
6. Use COTA Icons: Right-click on the file that you just added to the Zip Zone > Click **Properties > Change Icon > Select icon > Click Apply and OK**.

ZIP ZONE FOR MAC USERS

Documents and Folders: Determine your most-used locations and click and drag them to your rightmost, bottom dock area. You may be able to drag Share Drive Folders or SharePoint folders.

I recommend changing the icons of folders and documents to distinguish them. freethankyou. To change the look of your docked folders You can download free icons at www.getcontrol.net/freethankyou. To change the look of your docked folders – drag and drop an icon or image into the folder and rename the image 000 Image name. The folder icon will adopt the look of the image.