S. W. McKEE.

FOLLOW-UP FILING SYSTEM.

APPLICATION FILED JULY 17, 1919.

1,419,394.

Patented June 13, 1922.

3 SHEETS—SHEET 1.

Fig. 1.

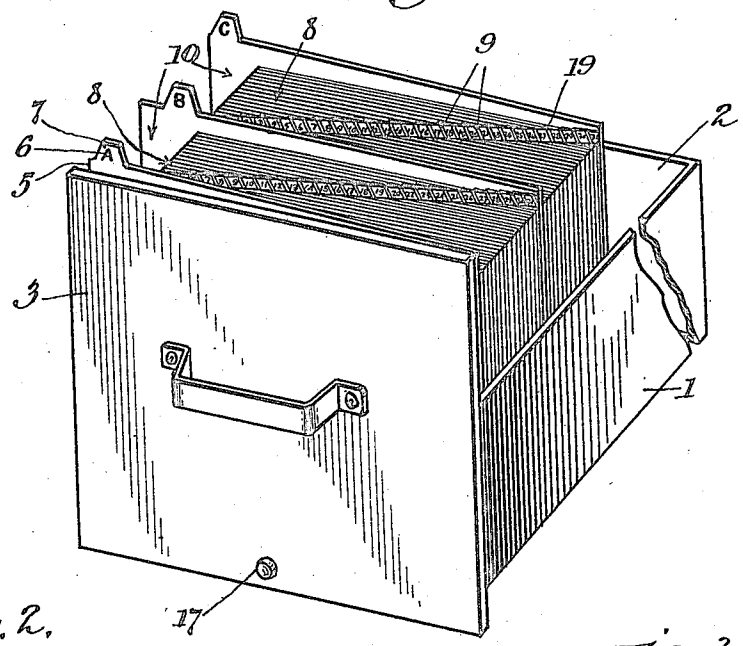


Fig. 2.

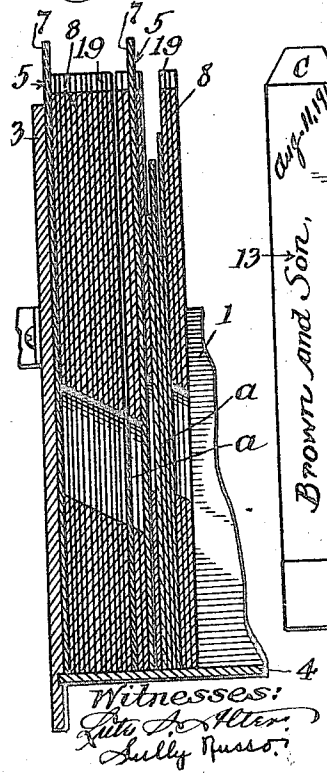
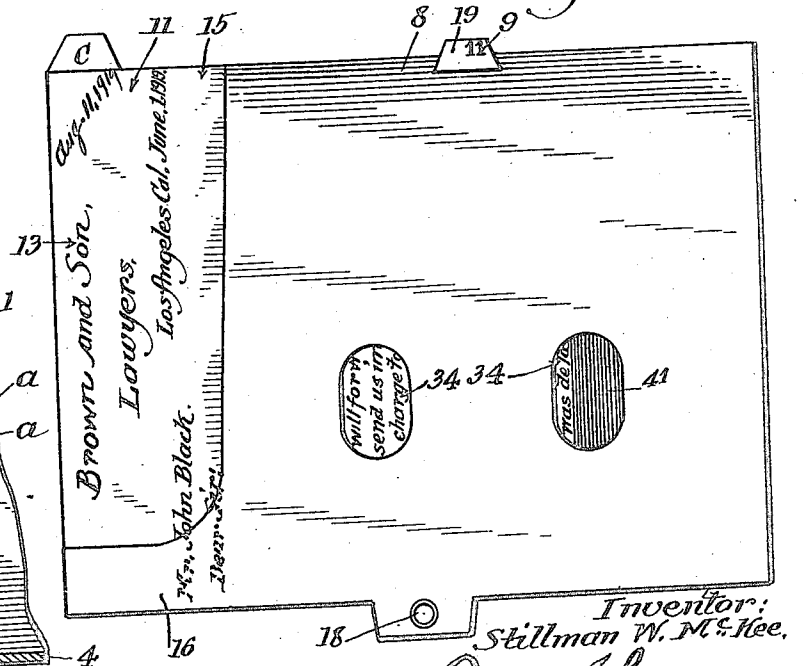


Fig. 3.



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3 SHEETS—SHEET 2.

Fig. 4.

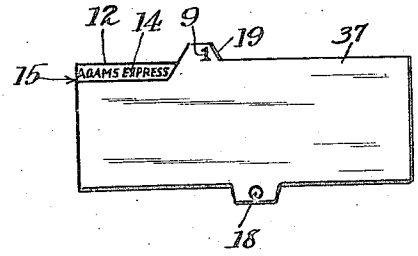


Fig. 7.

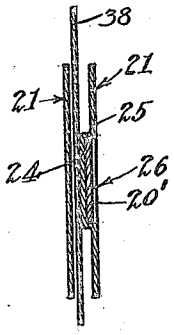


Fig. 6.

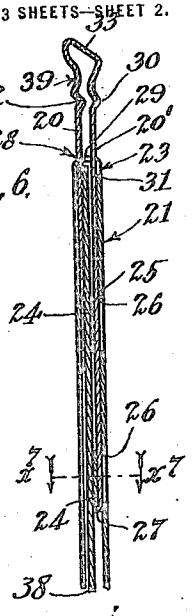


Fig. 5.

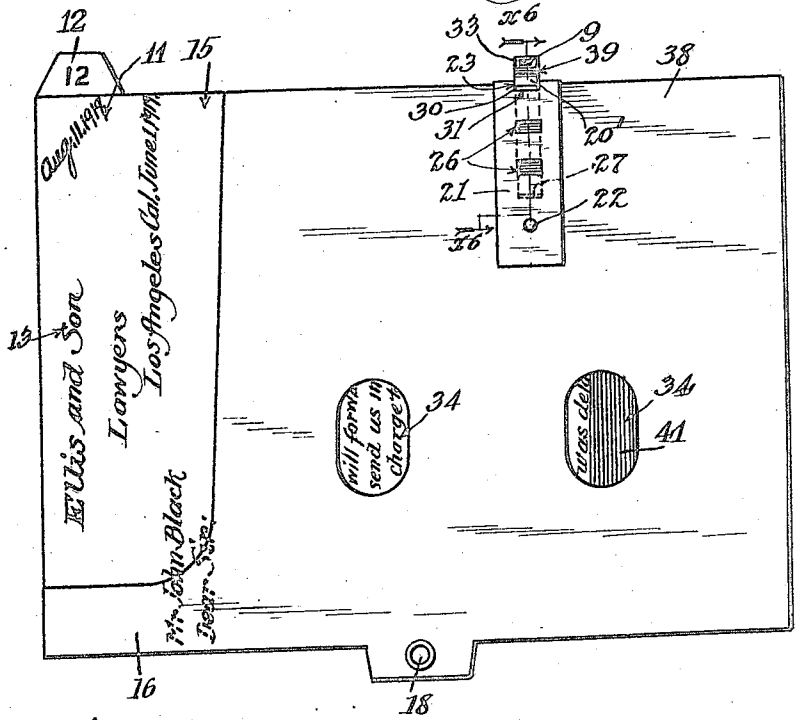
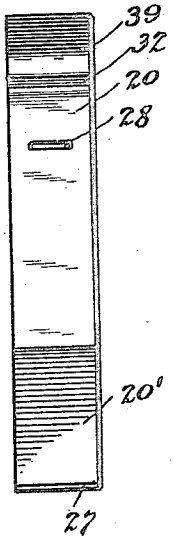


Fig. 8.



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FOLLOW-UP FILING SYSTEM.

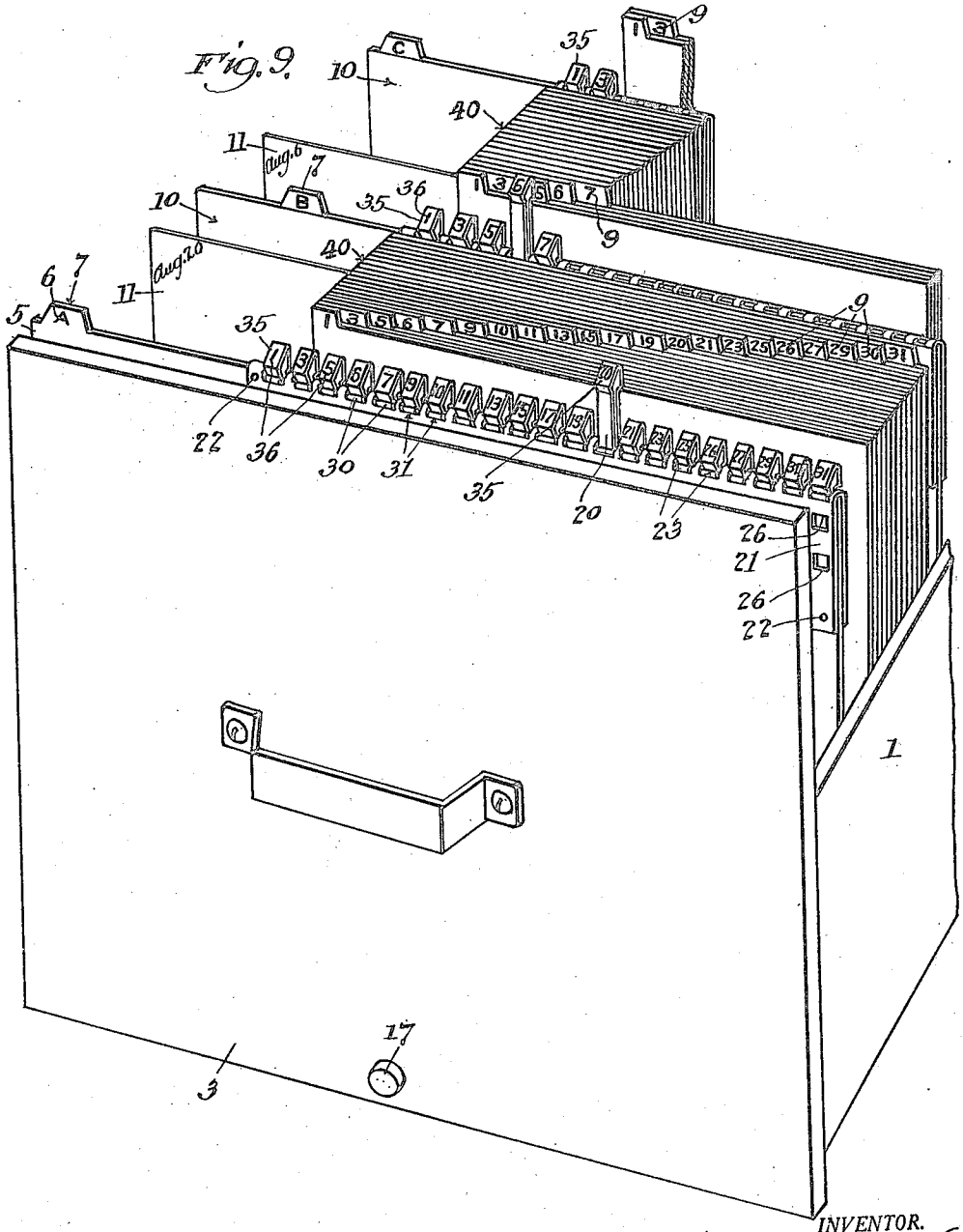
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3 SHEETS—SHEET 3.

Fig. 9.



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UNITED STATES PATENT OFFICE.

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FOLLOW-UP FILING SYSTEM.

1,419,394. Specification of Letters Patent. Patented June 13, 1922.

Application filed July 17, 1919. Serial No. 311,585.

To all whom it may concern:

Be it known that I, STILLMAN W. McKEE, a citizen of the United States, residing at Los Angeles, in the county of Los Angeles and State of California, have invented a new and useful Follow-Up Filing System, of which the following is a specification.

This invention relates to a filing system of a type in which letters and other matter which are to receive attention at some definite future date may be filed under the date on which they are to receive attention, and an object of the invention, in the main, is to provide for such filing and to also make provision whereby certain letters or other papers filed under any particular date, for referring to on said date, may be found with maximum ease at any time previous to said date.

Under a system employed at the present time in filing correspondence and other matter, to which it is desired to refer on a prescribed date, the letters are filed between alphabetical guides in accordance with the order of the follow-up dates on which it is desired to refer to the letters. When the letters are thus filed, the clerk is put to considerable trouble and inconvenience in placing the letters in the file and extracting them therefrom, for, it is obvious, that in either event the clerk must hunt through the letters in the alphabetic files and look at the follow-up dates thereon in order to locate the proper places for insertion of the letter being filed and for abstraction of a letter from the file. This operation requires the clerk to tilt his head to one side so as to readily read the follow-up date on the letter-head.

Another follow-up plan now in use is to use month guides, (Jan. to Dec.) with one set of 1 to 31 (days of month guides) back of each month guide. All papers needing attention on, for example, Jan. 15th would be filed back of Jan. guide and then back of guide #15. It is impossible to find a letter alphabetically under this plan at any time.

An object of this invention is to overcome the above mentioned difficulties in filing letters and other papers in and extracting them from the file on the date under which they are filed, and also extracting, and returning the papers on any day previous to the date under which they are filed.

Another object is to minimize the time requisite to file away correspondence and other papers, which are to be referred to upon a certain date, and requisite to extract certain desired correspondence or other papers when it is desired to refer to them previous to the date under which they are filed.

Another object is to provide a filing system which will facilitate removal or extraction of all of the letters or other papers wanted on a given date, without liability of overlooking any of said letters or papers.

Another object is to indicate by a signal on the subguide when a paper is positioned adjacent to said subguide.

Other objects and advantages will appear in the subjoined detailed description.

The accompanying drawings illustrate the invention:

Figure 1 is a perspective view of a filing system constructed in accordance with the provisions of this invention, some of the guides being omitted and a portion of the holder being broken away to contract the view.

Fig. 2 is a fragmental longitudinal section of the filing system shown in Fig. 1, the plane of section being axially of one set of the sight openings in the subguides.

Fig. 3 is an elevation of one of the subguides, a fragment of a letter also being shown in filing position relative to the subguide with a main guide behind said letter.

Fig. 4 is a modified form of subguide such, for example, as is useful in card filing systems, a card being shown in filing position relative to the subguide.

Fig. 5 is an elevation of another modified form of subguide, a fragment of a letter also being shown in filing position relative to said subguide with a main guide behind said letter.

Fig. 6 is an enlarged sectional elevation on line indicated by x^6—x^6, Fig. 5.

Fig. 7 is a plan section on line indicated by x^7—x^7, Fig. 6.

Fig. 8 is a rear elevation of the shiftable tab in Figs. 5 and 6.

Fig. 9 is a fragmental perspective view of a modified form of the filing system.

There is provided a suitable holder of any desired construction, said holder, in this instance, being in the form of a drawer comprising side members 1, a back member 2, a front member 3 and a bottom member 4. Any other suitable form of holder may be

employed, if desired. Arranged in the holder is a series of main guides 5 provided with main index characters 6, either alphabetical, as in Fig. 1, or numerical to represent the different days of the month. In the drawings the index characters 6 appear on upwardly proecting tabs 7 and such construction is preferred, though not absolutely necessary. When the index characters 6 comprise letters of the alphabet, each letter may be placed on a separate main guide, or in the case of such letters as X Y and Z, which are of comparatively infrequent use, they may be grouped two or three together on the same main guide, thus to conserve filing space to some degree.

Behind each main guide is a series of subguides 8, 37 or 38 identified by index characters 9. If the main index characters 6 are alphabetical, the subindex characters 9 will be numerical to represent the days of the month as in Figs. 3, 4 and 9, and if the main index characters 6 are numbers representing the days of the month the subindex characters will be letters of the alphabet as in Fig. 5. The subindex characters may be placed on upwardly projecting tabs 19, as shown.

The upper portion, at least, of each of the subguides 8, 37 or 38 is substantially narrower than the inside width of the holder so that when the subguide cards are assembled in the holder there will be a space 10 into which any papers may extend when such papers are placed in the file between the guides, a letter being indicated in the file at 11 and a memo or record card being indicated at 12 in filing relation to the form of subguide 37 shown in Fig. 4. With this construction it is clear that the letter head or inscription 13 is visible at the left of the tabs 19 in the space 10 and that the legend or inscription 14 on the card 12 would also be clearly visible in the file at the left of the tabs 19.

By narrowing the upper portion of each of the subguides 8, 37 or 38 a notch 15 is produced, the notches when combined forming the space 10. In the form of subguide shown in Figs. 3 and 5 the notch 15 is comparatively deep and extends almost to the lower edge of the subguide, whereas in the form of subguide shown in Fig. 4 the notch 15 is comparatively shallow. In Figs. 3 and 5 the bottom of the notch is formed by a lateral projection 16, but it is clear that even this projection may be cut away, if desired, so that the lower portion of the subguide, as well as the upper portion, will be substantially narrower than the inside width of the holder. The main guides 5 and subguides 8, 37 or 38, are preferably held in place in the holder by a rod 17 which may be of the usual construction and is well understood in the art pertaining to filling systems, said rod passing through perforations 18 in the main and subguides.

The invention thus far described operates as follows: Let it first be assumed, for example, to make clear the operation of the invention, that the main guides are lettered and arranged alphabetically and that the subguides are provided with date numbers and are numerically arranged. This is the organization shown in Figs. 1 and 9. Now, assuming that the clerk desires to file a communication from Brown & Son under the 11th day of the month, he will pull the "B" tab forwardly and then pull the "11" tab forwardly and insert the letter adjacent the subguide dated the 11th. It is obvious that the letter may be placed either in front of or behind the subguide having thereon the date on which the letter is to be given attention. It is customary, however, to file letters and papers back of the index guide.

Now, assuming that the clerk desires on the 5th of the month, for some reason or other, to extract from the file the letter from Brown & Son which was filed under the 11th, he will pull forwardly the "B" tab and look in the space 10 for the letterhead of Brown & Son's letter. If there be several other letters or other papers in front of Brown & Son's letter, the clerk will leaf them over until Brown & Son's letter is exposed to view. This letter will then be removed from the file. After the letter has been used as desired, if the letter is still to receive attention on the 11th, it will be returned to its former place in the file or, if it is desired to give the letter attention on a different date, the letter will be filed adjacent the subguide provided with the different given date.

Now, assuming that before the 11th of the month other letters besides Brown & Son's letter have been placed in the file adjacent various subguides provided with the date "11", and that the 11th of the month has arrived, the clerk will pull forwardly each subguide dated "11" to release said letters from pressure and he will pull said letters from the file. It is noted that like dates of the several series of subguides are alined with one another and thus the clerk's eye can readily locate the subguides having thereon the particular date to which he is referring.

If the papers to be filed are to be consulted or referred to quite frequently, the main alphabetical indexing and subdate indexing just described is advisable to use but, if the business handled by the filing system is of such a nature that it is comparatively infrequent that a letter or other paper need be extracted from the file before the date on which it is to receive attention, it may be preferable to employ the date index

characters on the main guides and the alphabetical index characters on the subguides. The foregoing description of the operation also makes clear substantially how the system is operated when the main guides are dated and the subguides are lettered, for the papers will be filed in accordance with the dates on which they are to receive attention and then alphabetically according to the senders' or addressee's names. However, it is to be noted that, with the dated main guides and lettered subguides, the papers which are to be given attention on any given date can all be extracted together from the file in one operation, since all the operator need do is to pull forwardly the main guide having the given date thereon thus exposing in the space 10 the letterheads of all of the letters and other papers which are to be extracted from the file. The clerk will grasp the exposed ends of all of the papers and draw them with a single motion from between the adjacent subguides.

The foregoing described construction may be used independently of other features included in the invention and now to be described. The subguides 8 and 38 are provided with one or more sight openings 34 and, preferably, the sight openings in each succeeding subguide beginning at the front of the holder will be at a slightly lower level than the sight openings in the immediately preceding subguide so that when the subguides are pushed away from the front member 3 and are aslant upwardly and rearwardly the clerk can readily look through the sight openings to ascertain whether or not there are any papers remaining between the subguides after he has grasped and removed the larger papers under any given date as above described. Preferably at least two sight openings are provided in the lower portion of each of the subguides and are so spaced relative to one another and to the end edges of the subguides that relatively small memorandum papers *a* and the like, when placed between two adjacent subguides, will be exposed to view through at least one of the sight openings.

It may be advisable, in some installations of the system, to make provision for raising and lowering of the tabs, and in such instances the movable tabs constitute signals to indicate where the letters and other papers are filed in the holder. The movable tabs may be variously constructed and mounted and in the instance shown in Figs. 5 to 8 of the drawings the tab and its mounting are constructed as follows: The tab 39 is substantially U-shaped and its legs 20, 20′ are shiftably mounted within a clip 21 which is fastened by a rivet 22 or its equivalent to the body of the subguide. The tab 39 works through a slot 23 in the upper edge of the clip 21 which clip is also U-shaped so as to embrace the body of the subguide. In order to prevent lateral shifting of the lower portion of the tab, one or more straps 24 may be pressed inwardly from the leg 25 of the clip 21 so as to form slots 26 through which the leg 20′ of the clip passes. The lower end of the leg 20′ is preferably bent inwardly to form an abutment 27 adapted to engage the lower edge of the lowermost strap 24 when the tab is moved upwardly, so as to limit upward movement of the tab. The leg 20 is provided with a transverse slot 28 adapted to be engaged by a tongue 29 formed by one of the longitudinal edges of the slot 23. The slot 28 is so positioned as to be engaged by the tongue 29 when the tab is in the raised or indicating position shown in Fig. 6. When it is desired to push the tab 39 into non-indicating position, the operator will produce sufficient pressure forwardly against the leg 20 to retract said leg from engagement with the tongue 29 and he will then press downwardly on the tab. Downward movement of the tab is limited by a shoulder or stop 30 on the leg 20′ adapted to engage the longitudinal edge 31 of the slot 23. The tab 39 may be latched in non-indicating position and for this purpose the leg 20 is provided with a recess or notch 32 adapted to be engaged by the tongue 29 when the tab is pushed downwardly to non-indicating position. The tab 39 may be provided with an upwardly and rearwardly slanting face 33 upon which the index character 9 is stamped or otherwise marked. In this form of the invention the main guides are the same as described above and shown in Fig. 1.

To use the signal above described, when the clerk desires to file a paper which is to be referred to on a later date, for example, on the 15th of the month, he will place the paper adjacent the subguide provided with a shiftable tab bearing the date "15" and he will move the tab into elevated position. Assuming that other papers are also placed in the file adjacent other subguides having shiftable tabs bearing the same date, when the 15th of the month arrives the clerk refers to the file and notes the elevated tabs bearing the date "15," regardless of which alphabetical guides the papers are filed after, and abstracts the papers that are adjacent the subguides bearing the date "15." Time is conserved in employing the signal because it is probable that the papers to be referred to on a certain future date are not adjacent all subguides bearing the date "15," it being understood that there is a series of dated subguides after each lettered main guide the same as described above for the form of the invention shown in Fig. 1. If the papers are to be returned to the file under the same date as before, the shiftable tabs will be allowed to remain in their elevated positions, thus indicating to the clerk where the papers be-

long when he is refiling them, but if the papers are to be withheld from the file the corresponding tabs will be depressed.

Of course, instead of lettering the main guides and dating the shiftable subguides, the order may be reversed and the main guides may be dated and the shiftable subguides lettered. Then, if the clerk desires to file a letter from Brown & Son, under a future date, he will place the letter adjacent the subguide lettered "B" behind the main guide bearing the date whereon the letter is to be referred to, and he will pull up the shiftable tab bearing the letter "B."

The subguides 8, 37 and 38 are shown in the drawings in the form of single sheets but it is understood that, if desired, the subguides may be in the form of folders, containers or envelopes of any description. It is to be noted that if the sight openings 34 were all at the same level the clerk could not look over the front of the holder and through the openings from front to rear of each series of subguides and therefore it is quite important that the hole formed by the combined sight openings of each series be aslant upwardly and forwardly so that the hole can be seen throughout its entire length.

If the main guide be white or whitish, it may be difficult for the clerk to readily see whether or not there are any small papers between the subguides of any given series, since in looking through the sight openings 34 he may mistake the main guide for a paper or a paper for the main guide, and therefore I prefer to color the main guides which are exposed to view through the sight openings. For example, the main guides may be wholly or partly colored red as indicated at 41 in Figs. 3 and 5.

Now referring more particularly to Fig. 9, another way of employing the movable tabs is to place a series of them on each of the main guides as indicated at 35, said tabs being constructed identically with the tabs 39 shown in Fig. 5. In each series here shown are tabs provided with the odd members from 1 to 31 as indicated at 36, only alternate days of the month being represented in this particular instance, though it is understood that, if desired, one tab may be provided for each day of the month.

The sub-guides, indicated at 40 in Fig. 9, are similar to the subguides 8 in Figs. 1 to 3, the only difference being that the tabs, on which the index characters appear, are integral with the body of the subguides and are formed by notching the upper margins of the subguides so as to leave the tab portion projecting above that portion of the subguide on the right of the tab.

In practice, the form of the invention shown in Fig. 9 operates the same as described above for the form shown in Fig. 1 excepting that, when the letter or other paper is being filed, the tab 35, on the appropriate main guide, corresponding nearest in number with the follow-up date on the letter is elevated to indicate that the letter filed adjacent the subguide numbered to most nearly correspond with the follow-up date of the letter is to be given attention on or near the date number appearing on the elevated tab.

If the subguides 40 are provided with date numbers, the tabs 35 will also be provided with date numbers as shown in Fig. 9, but it is understood that, if the main guides are provided with date numbers and the subguides with letters, the tabs 35 will be provided with letters to correspond with the letters on the subguides.

Whether the subguides and tabs 35 are numbered or lettered, it is understood that the numbers or letters on the tabs 35 will correspond with those, respectively, in alinement longitudinally of the holder on the subguides.

I claim:

1. In a follow-up filing system, a holder, and guides mounted in the holder, some of the guides being provided with letter index characters and others with numbers representing days of the month and the alphabetical and number indexes being so related that a paper bearing an identifying inscription and follow-up date may be filed in the holder in accordance with its alphabetical order and follow-up date, the upper portions of some of the guides being substantially narrower than the inside width of the holder so that a space is formed at one side of the holder when the narrower guides are assembled in the holder so that the inscription on the letter will be exposed to view in said space.

2. In a follow-up filing system, a holder, and series of guides mounted in the holder, some of the guides being provided with letter index characters and others with numbers representing days of the month and the alphabetical and number indexes being so related that a paper bearing an identifying inscription and follow-up date may be filed in the holder in accordance with its alphabetical order and follow-up date, there being sight openings in some of the guides and the sight opening in each succeeding guide of a series beginning at the front of the series being slightly lower than the opening in the next forward guide of said series.

3. In a follow-up filing system, a holder, and series of guides mounted in the holder, some of the guides being provided with letter index characters and others with numbers representing days of the month and the alphabetical and number indexes being so related that a paper bearing an identifying inscription and follow-up date may be filed in the holder in accordance with its alpha-

betical order and follow-up date, there being sight openings in some of the guides and others of the guides being colored at the portions exposed to view through the sight openings.

4. In a follow-up filing system, a holder, and series of guides mounted in the holder, the guides of one series having colored portions and the guides of the other series having sight openings through which said colored portions are exposed to view.

5. In a follow-up filing system, a holder, a series of main guides, and a series of subguides behind each main guide, the main guides having different index characters of one notation and the subguides of each series having different index characters of another notation, the upper portions of some of the guides being substantially narrower than the inside width of the holder so that a space is formed at one side of the holder when the narrower guides are assembled.

6. In a follow-up filing system, a holder, guides mounted in the holder, some of the guides being provided with alphabetical index characters and others with index numbers representing days of the month, and the alphabetical and number indexes being so related that a paper bearing an identifying inscription and follow-up date may be filed in the holder in accordance with its alphabetical order and follow-up date, and movable tabs mounted on certain of the guides and bearing index characters corresponding with the index characters on the remaining guides.

7. In a follow-up filing system, a holder, a series of main guides, a series of subguides behind each main guide, the main guides bearing certain index characters and the subguides bearing different index characters from those on the main guides, and movable tabs on the main guides bearing index characters corresponding to the index characters on the subguides.

Signed at Los Angeles, California, this 10th day of July 1919.

STILLMAN W. McKEE.

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