

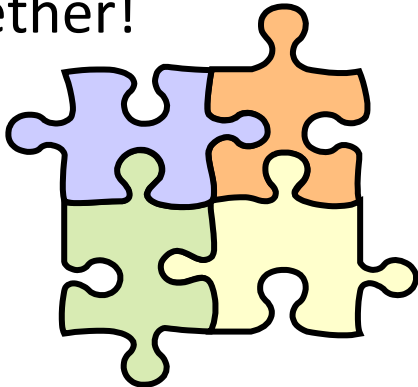
# Filing, Records Management And Organization



# Filing & Records Management

## Your office – a puzzle?

- What do you do after you dump out all the pieces?
- Just as you can't complete a puzzle picking out random pieces, with the right method it all comes together!



## Your "space"

- Is your furniture "hiding" under the piles?
- Do temporary files overstay their welcome?
- Do you have an unhealthy relationship with expired and/or useless document.



# Breakdown your office into sections

- Bookcase(s)
- Filing cabinets
- Credenza/Computer stand/work table
- Primary Desk

# Bookcase(s)

- Throw out all old versions of manuals, catalogs, etc.
- Move reference books not used regularly to central location to share.
- Unused items that must be kept can be boxed and moved to storage room.
- Loose papers can be 3-hole-punched and put in binders.



# Filing Cabinets

- Files used LESS than once/month (Semi-Annual Reports, Evaluations, Graduation)
- Frequently used files should be in arm's reach (Budget, forms, current projects)
- It takes less time to get up out of your chair and walk to the file cabinet than to do the file shuffle!
- Weed out old information and background materials that only take up space.



# Credenza/Computer stand/work table

- Just because it has drawers doesn't make it a hiding spot!
- Good place for supplies you USE- note pads, post-its, frequently used reference manuals, interoffice envelopes, items to read.



# Primary Desk

- **DESKTOP**

The most-used should be closest to you:

- telephone
- computer
- typewriter
- printer
- stapler
- in/out box
- pens & pencils
- tape
- calculator
- framed pictures
- pencil sharpener
- calendar
- radio

- **DESK DRAWERS**

Only items you use regularly.  
Throw away unidentifiable and useless items:

- old power cords
- brittle rubber bands
- dry white-out
- old business cards
- pencil stubs
- inkless pens
- assorted nuts & bolts
- scattered paperclips
- fast food packets
- napkins
- plastic/paper bags
- extra shoes

## Your "tools"

- Calendar
  - Notepad
    - Essential Office Products



# Calendar/Day Planner

- Book or Computer?  
(use one system!)
- Recurring tasks
- Color coding
- PDA's



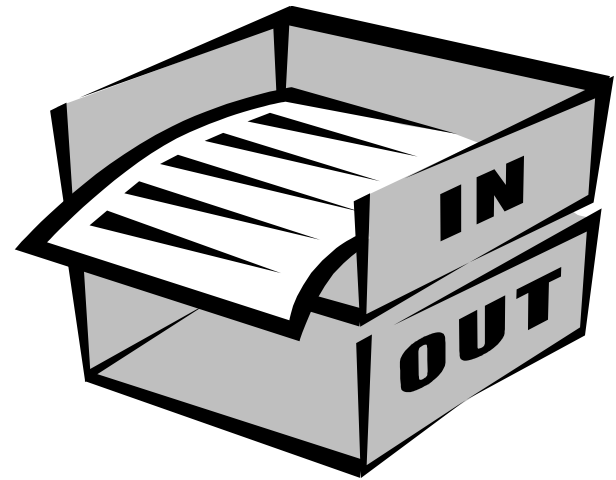
## Notepad

- No more paper scraps and sticky notes!
- One sheet per day, date bottom corner.
- May be part of paper calendar.
- Write down next day's priorities at the end of every day.



# Essential Office Products

- In-basket/out-basket.  
(clean at the end of the day)
- File folders with organizer (hot, hold, signature, copy, and projects)
- Three-ring binders
- Stackable letter trays in place of file folders.



Now that we have our house in order...



...WHERE DO WE FILE ALL THAT  
PAPER?

It's Magic



Actually...

it's not!





**What is a record?**  
(all documentary materials, regardless of forms)



**What is a record series?**  
(a body of file units or documents arranged in accordance with a unified filing system)



**Life cycle of records?**  
(all records have a life cycle or cycle of active life)

*Embrace your files*



Creating and  
maintaining  
economical  
and efficient  
filing system.



Getting to know your files



What types?

Retrieval?

Who uses?

What do I do with this record

Point the Way



“Coding”

# Finding your files



Don't be  
fickle...

...give yourself  
a tickle!

Find it fast



The straighter  
the past...  
...the faster the  
pace!

Taking the right road



Having a filing system in place.

Have a map to your filing system.

# Record Classification



Vital

Important

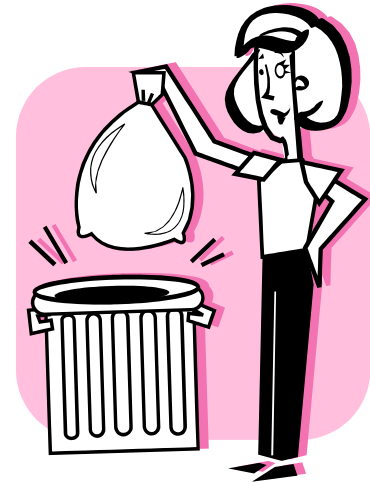
Useful

Nonessential

# Toss

Not sure if you can toss it?

- Does it require any action?
- Does it have a specific purpose?
- Does it exist in another place or form?
- How often will I refer to it?
- Will it add something new to what I already have?
- Is it recent enough to be useful?
- Is it difficult to obtain again?
- Is it part of my Records Retention schedule?
- Do I have time to read it?
- Is the information available online?



# File

- File anything that would be hard to replace.
- Is it the only copy?
- Did my office originate it?
- Know your files.
- **FILE.....DON'T FILE!**



# Five "P's" of Paper Proliferation Prevention

**PROCESS IT**

**PREVENT IT**

**PITCH IT**

**PUT IT AWAY**

**PERSIST**

# Tips and Techniques

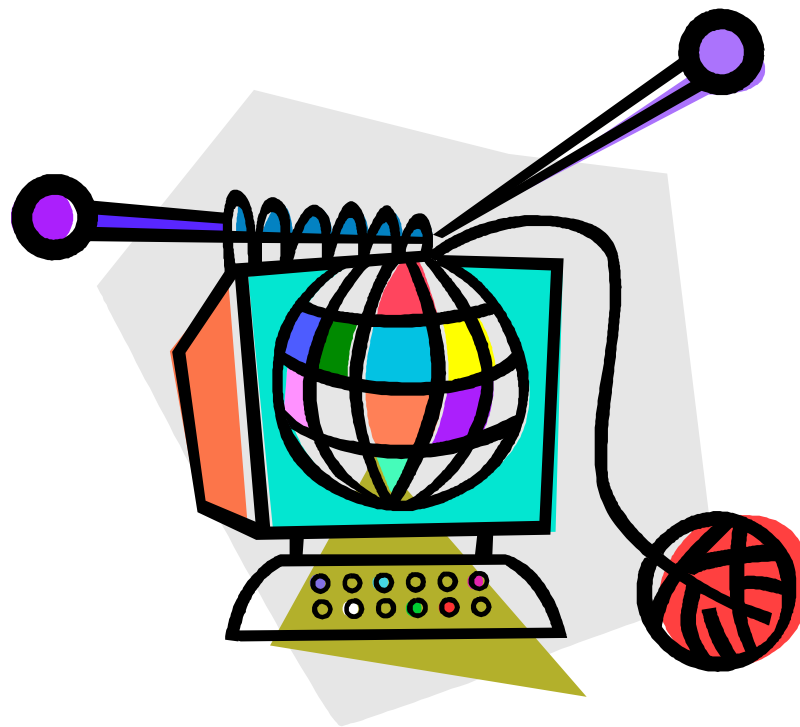
- Do the “worst” first!
- Think before you print: emails – store in folders if they must be saved; Web pages – highlight only portion you need, click on FILE, PRINT, then choose PRINT SELECTION.
- Feeling Good? Get to Work! Unfortunately, when we feel our best we tend to socialize. Then when the energy lag hits its “I guess I should get to work.”

# Tips and Techniques

- Pick up after yourself! If you take a paper out of a file, put it back! Don't set it aside for later.
- Quit working on projects 15 minutes early: clear off desk, check inbox, put all loose papers in appropriate folders, deliver items in outbox, jot down next day's priorities. Have your desk "sub ready"!
- You can do anything for 15 minutes!

## Some Sources to Consider

- [www.flylady.net](http://www.flylady.net)
- [www.getorganizednow.com](http://www.getorganizednow.com)
- [www.pendaflex.com](http://www.pendaflex.com)
- [www.smead.com](http://www.smead.com)



Finally....Have a Great Day!

