

Document Management and the Sweet Art of Filing

Filing can be the biggest challenge in many offices, yet provides the fastest benefits. What's the point in having lots of information if you can't find it?

Questions to ask yourself?

- When were your filing drawers or computer folders last reviewed? At random pull out any file and thumb through it.
 - What's your oldest document there?
 - Has anything passed by its use by date?
 - Any duplicates?
- How full are your drawers / folders? How full are the files themselves? Can you get your hands in easily?
- What does it look like?
- Is there any filing sitting around waiting to be done?
- Does everyone in the office know the system? Is it consistent?
- How many categories of stuff do you have? How many do you need?
- Are your file headings specific and clear?
- Do you have a large miscellaneous file or folder?
- How many items in your computer Documents folder are 'loose'?

Suggestions:

- Keep it simple
 - Use broad categories
 - Label carefully – be consistent with naming protocols
- Be selective about what you keep – use the golden question – can I get this again if I need it in the future?
- Remember, 85% of what we file is never looked at again (unless you have a tax audit)
- Use the 'Permanent resting home in the universe' – throw it away or shred it!
- Rationalise your current system
 - Review, reduce, combine, archive
 - Review your naming protocol – be consistent. Ask what is logical for us?
 - The more complex you make it, the less likely others will learn to use it.
 - Index – for paper files, have a copy of the category headings or Index on the outside of the file cabinet
 - Perhaps use cross referencing for larger systems
- If paper files are often removed temporarily, think about using a marker (different colours for different people) to replace the missing file.

Things to think about

- Back-up systems – if you have good, trustworthy back-up systems, why keep those same files in your current area (e-documents)?
- Archive those older files and email and reduce the current files to easily searchable/usable folders

Using Windows Explorer or other search programs to search for anything electronic.



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Questionnaire	How efficient are your office systems and procedures?
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	Yes	No
Does the state of your office reflect your competency?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have problems finding documents?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have more paperwork than you know what to do with?	<input type="checkbox"/>	<input type="checkbox"/>
Do you handle a document more than twice?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a full, flat file Inbox?	<input type="checkbox"/>	<input type="checkbox"/>
Can you tell someone else how to find things instantly?	<input type="checkbox"/>	<input type="checkbox"/>
If you are away, can someone else take care of your paperwork?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have processes in place for handling your particular paperwork?	<input type="checkbox"/>	<input type="checkbox"/>
Do you keep a diary (paper or electronic) for follow up requirements as well as appointments?	<input type="checkbox"/>	<input type="checkbox"/>
Do you review current procedures with your team to see if the systems work?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a back-up plan (disaster recovery plan) in place?	<input type="checkbox"/>	<input type="checkbox"/>
	Proactive	Reactive
Are you proactive or reactive with your office systems?	<input type="checkbox"/>	<input type="checkbox"/>

Information

Flowchart Basic Procedure

Materials needed: sticky notes or cards, a large piece of flipchart paper or newsprint, marking pens.

1. Define the process to be diagrammed. Write its title at the top of the work surface.
2. Discuss and decide on the boundaries of your process: Where or when does the process start? Where or when does it end? Discuss and decide on the level of detail to be included in the diagram.
3. Brainstorm the activities that take place. Write each on a card or sticky note. Sequence is not important at this point, although thinking in sequence may help people remember all the steps.
4. Arrange the activities in proper sequence.
5. When all activities are included and everyone agrees that the sequence is correct, draw arrows to show the flow of the process.
6. Review the flowchart with others involved in the process (workers, supervisors, suppliers, customers) to see if they agree that the process is drawn accurately.

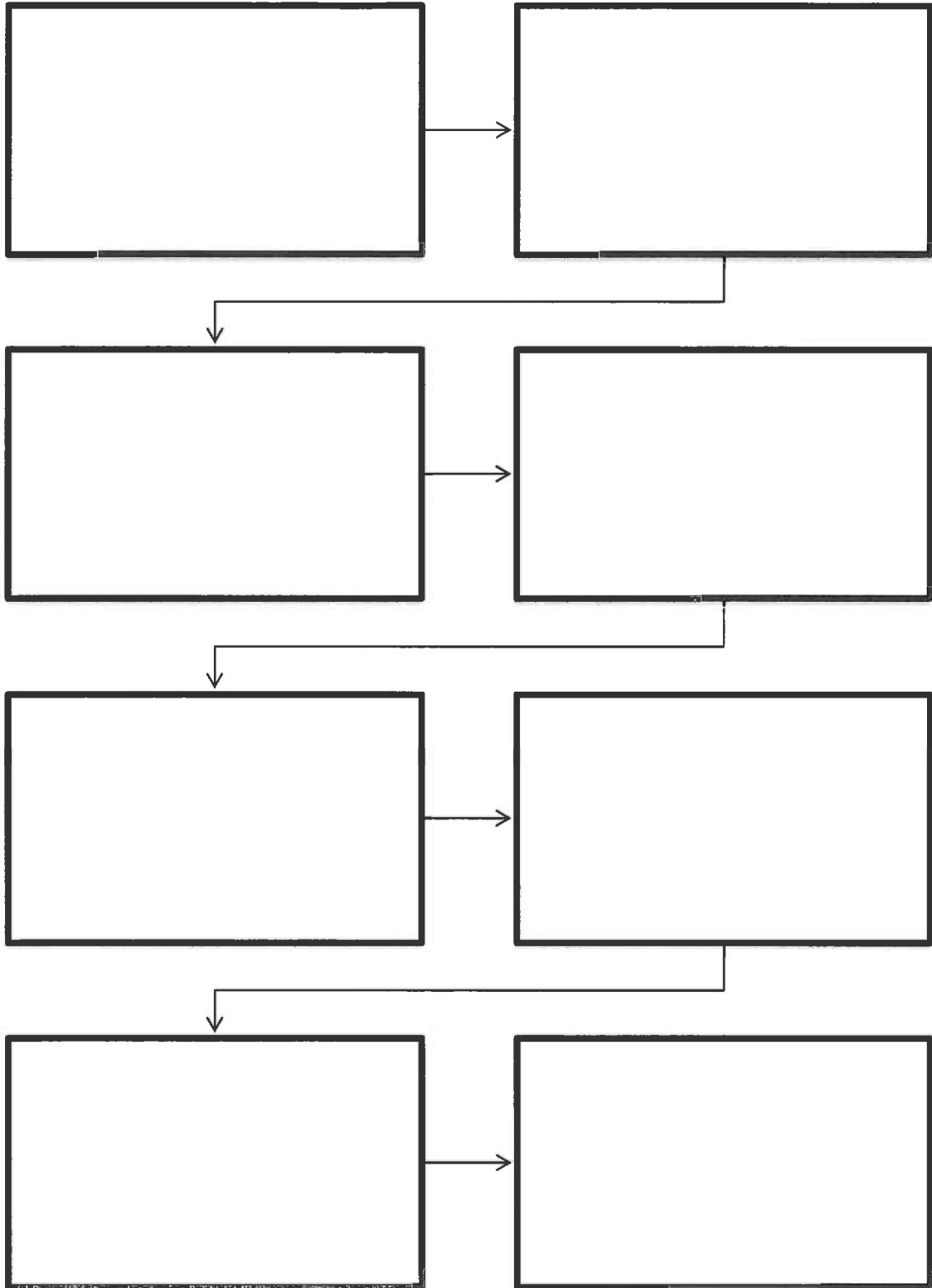
Flowchart Considerations

- Don't worry too much about drawing the flowchart the "right way." The right way is the way that helps those involved understand the process.
- Identify and involve in the flowcharting process all key people involved with the process. This includes those who do the work in the process: suppliers, customers and supervisors. Involve them in the actual flowcharting sessions by interviewing them before the sessions and/or by showing them the developing flowchart between work sessions and obtaining their feedback.
- Do not assign a "technical expert" to draw the flowchart. People who actually perform the process should do it.
- Computer software is available for drawing flowcharts. Software is useful for drawing a neat final diagram, but the method given here works better for the messy initial stages of creating the flowchart.

Excerpted from Nancy R. Tague's *The Quality Toolbox*, Second Edition, ASQ Quality Press, 2004, pages 255-257.

WORKSHEET 1

CREATE A FLOWCHART – One Simple School Administration Task



WORKSHEET 2

PLAN OF ACTION

Starting Now . . . I will commit to:

List three actions that I will take within the next week

1.

2.

3.

Date

Signed.....

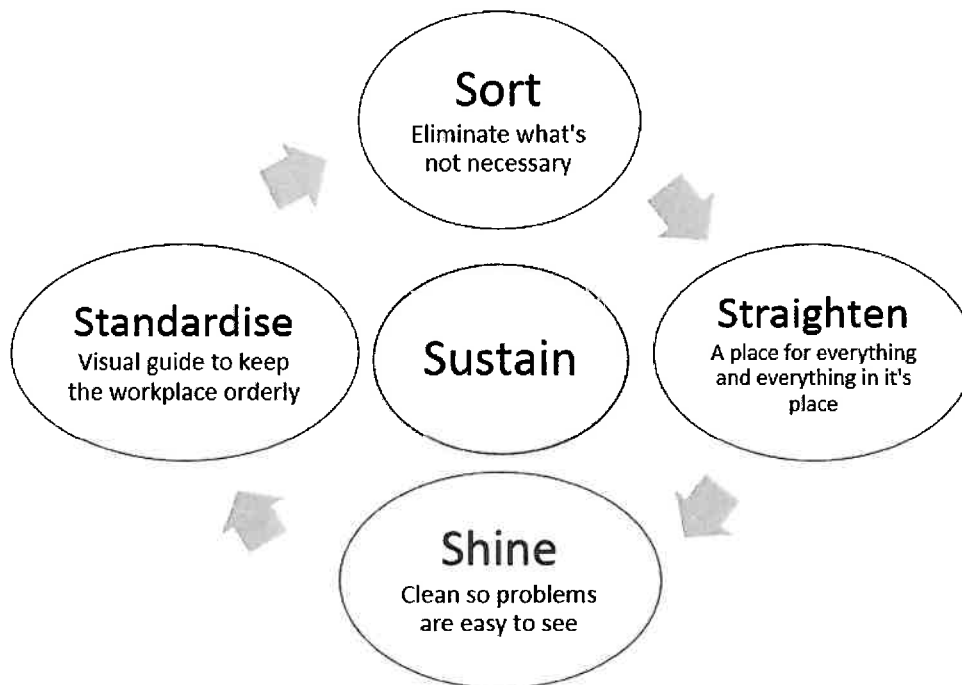
**OTHER BUSINESS
IMPROVEMENT IDEAS**

**KAIZEN - Continuous improvement in small
increments**

The kaizen 5S framework for a well-organized business

- Sorting – when in doubt throw it out
- Straighten or set in order – “A place for everything and everything in its place”
- Shine - systematic cleaning – part of the daily work
- Standardize – “see and recognise what needs to be done”
- Sustaining the discipline

Major Results: Elimination of waste and incorporation of efficiency



Please note: this handout is designed to provide information on the subject matter covered and is based on the authors’ opinions and experience. The information contained in our workbooks & workshops/ seminars is designed to assist you to explore certain issues that may affect you and your business. The information and tools provided are not substitutes for commercial judgement or professional advice. You should not act in reliance upon any of its contents without first obtaining professional advice relevant to your circumstances. **Assist You** accepts no liability or responsibility for ensuring that the information and tools are appropriate for you or your particular business.