The Office Organizer

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Special Report from:

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The Office Organizer:

10 tips on file organizing, clutter control, document management, business shredding policy, record retention guidelines and how to organize office emails

Keep your office operations running smoothly—and ward off chaos and legal trouble—with practical document management techniques for administrative professionals, office managers and HR professionals.

The Office Organizer shows you how to boost productivity, improve the bottom line and protect your business interests from liability. You'll learn 10 field-tested techniques on everything from organizing folders, tracking documents and controlling clutter to business shredding compliance rules, record retention guidelines and how to organize office emails.

The Office Organizer #1

File organizing: Find any paper file—instantly

If your boss asked you for a particular report, could you instantly put your finger on it? Could you hand it to him while he's standing over your desk, or would you have to tell him you'll bring it to him later?

If you don't have a filing system that's built on easy retrieval, you'll waste a lot of time hunting—plus you won't make a very good impression on your boss, co-workers or customers. Try implementing one of these simple filing systems:

- ☐ **Use color coding to your advantage.** If you have a different-colored folder for each of your main projects or for each department you regularly work with, finding what you need will be a snap. Say your boss asks for a budget-related document—just look for the purple folder in which you keep all your budget materials. This works for electronic folders as well as paper. Make sure you're taking advantage of the color coding options in Outlook and other software programs.
- ☐ **Use broad headings for all your files.** If you labeled a file "Procedural Memo on How to File Expense Reports Dated 1/20/16," you'd soon find that you need 14 filing cabinets to house the overflow. Instead, use a broad term like "Expense Reports, 2016," and file all your procedural memos

there, along with copies of expense reports. Other examples of broad headings to use: “Industry News,” “Ad Campaigns” and “Budget 2012.”

- ☐ **Try subdividing broad headings.** In your “Budget 2012” hanging file, you could label individual folders with categories such as “Salaries,” “Performance Reviews” and “Production Costs.”

Try to mark the files neatly and clearly, but don’t go off the deep end. If the filing takes on a life of its own and you find yourself setting up a new filing system, stop. Delegate that task to someone else, or make do with a less-than-perfect system. The time you’d invest in revising your filing system is an invitation to procrastinate.

5 secrets to better file organizing

1. If it works, don’t worry about how it looks. As long as your filing system works for you, it’s really a matter of your personal style. Some businesspeople are neat and orderly; others have cluttered desks and messy offices. Both types can be organized, despite their obvious differences. Some people with incredibly cluttered desks can retrieve files faster than others who are neatness freaks.

2. Organize your files around retrieval. Your goal is easy retrieval. After all, if you can’t find a file, you might as well not have it.

3. Assign toss-out dates to your files. If you never throw anything away, you’ll make the filing cabinet manufacturers very happy, but you’ll waste time trying to find anything. You simply don’t have to keep every scrap of paper forever.
Caution: Some documents, for legal or financial reasons, must be kept a specified length of time *(see page 12)*.

4. Move your paper—don’t let it pile up. To avoid huge piles of paper on your desk, make it a habit to go through the stack several times a week. Start at the top of the pile and do something—*anything*—with each piece. Give it to your boss, throw it away, file it or reply to it immediately. Or, if you can’t figure out what to do with it then, place it in a holding file, assign it a date and deal with it later.

5. Clear your desk before you leave for the day. Each night, stack files neatly, put away items you won’t need tomorrow and throw away trash. At the center of your desk, place all the “to do” projects you’ll need to handle tomorrow.

Final tip: Review your files every three or four months. Try not to keep items for more than a year. As one time-management expert pointed out, 80% of what we file we never look at again.

The Office Organizer #2

Clutter control: Document management tips

Your office may be so cluttered that you waste time looking for what you need, or you're so hung up on keeping it spotless that you put off more urgent work. Cluttered or clean, then, misses the point when it comes to efficient organization. Your goal is get the most work done in the shortest time. For that, you need an organizational style that fits your needs.

First, consider how you organize your desk. It's the master tool in your office, the hub around which you group all your work. No, your desk doesn't need to be spotless, but much of the paper cluttering your desktop and other available office space belongs in the wastebasket.

Stacks of reports, memos, magazines and so on are neither bad nor good in themselves. Many messy employees can find anything they need in a minute or two, provided they keep the stacks manageable. But if the clutter gets out of hand, they can spend hours, literally, looking for what they need.

Case in point: A time-management expert kept a clock on one executive for an entire day. His time study revealed that the executive spent a staggering two and a half hours a day just looking for things. So keep a check on yourself. Don't let a cluttered desk start costing you more time than a cleanup job would.

When a major cleanup is called for, remove everything from your desk. Empty all the drawers. Toss everything you don't absolutely need. Then make a list of the items you've kept, and ask yourself one more time if you can't toss those as well. Put only essential papers back on your desk. File the rest.

Follow the "daily" rule. If you don't use an item every day, store it out of sight. Your desktop is not a storage area; the papers there should be the ones on which you are currently working. When items don't have a "home," they pile up everywhere.

Tip: Keep a good-sized in-basket and out-basket on your desk, but make sure they don't overflow. Paper should move briskly.

File this one under 'clutter'

A reader of the ***Administrative Professional Today*** newsletter posed this question asking for advice on how to handle a common admin dilemma:

Question: *"**My boss has an inbox on his desk that he keeps for his 'I don't know where to put this' stuff.** It contains items such as emails, letters and newspaper articles that he may need to reference but that don't necessarily constitute filing away. Can you suggest a way to organize this box?"*

Answer: "The papers you refer to sound like they need filing, since you're not at liberty to toss them or refer them to someone else. So you'll need a system that works for you and allows you to make quick decisions about where to put the clutter.

"If items in your boss's inbox relate to current work and contain fewer than 20 pieces of paper, the best solution may be one desktop file or pile (in a designated corner). Why? It's easier to go through one file with 20 pieces of paper than through 10 files with two papers each.

"But as the volume increases, your ability to find papers when you need them will decrease, and you'll be more likely to find them if you put them in action or reference files.

"As the volume increases, you can sort papers into **'Action Files'** titled: **Call, Discuss, Online, Write, Read** or **Review**, or whatever seems appropriate. Then keep the files accessible, either on top of a desk for quick reference or in a nearby file drawer.

"Anything that doesn't require action can go in your **Reference Files**, stored in a filing cabinet. Some people use broad headings like **'Brochures'** or **'Articles,'** especially for smaller quantities.

"Tip: If you file something in your action or reference files that relates to a time-sensitive event, such as a meeting or a conference, mark a symbol on your calendar to remind you to look in the folder."

The Office Organizer #3

Set up a wiki to speed document collaboration

Problem: You create a PowerPoint presentation and send it to five co-workers for review. Over the next few days, you exchange email with them about the presentation, attaching it each time. By week's end, you're confused: Has everyone weighed in? Which document is the most recent one?

Solution: It could be time to look into wikis.

Wiki software allows users to create and update Web pages easily, either through a hosted site on the Internet or on your office intranet. Teams can collaborate on a single document in real time without having to send attachments back and forth.

Example: At MWW Group, an award-winning PR and marketing firm, 200 employees have made the switch from email to wikis. How do they use the technology? Writers and designers use wiki pages to brainstorm ad campaigns. The HR team uses wikis to post benefits information; sales uses one to track prospects.

Result: Teams doubled their productivity while reducing the number of time-wasting meetings. Instead, employees can simply pull up a wiki on a Web browser when they need a progress report or want to change a document.

Tip: IT can set up your wiki, or you might want to check out free wiki options online, such as:

- **PmWiki**, www.pmwiki.org
- **Socialtext**, www.socialtext.com
- **Wikispaces**, www.wikispaces.com

The Office Organizer #4

Tracking multiple versions of a document

Here's a familiar dilemma, described by a reader of the newsletter *Administrative Professional Today*. The reader asked for advice on how to track multiple versions of a Microsoft Word document:

"I often type up handwritten reports for my boss, and then the document goes back and forth between us (and sometimes others) for revisions. The problem arises when three, six or nine months later he asks for a copy of the document. I often have problems locating the last version. Usually, I name each successive revision v1, v2, v3, etc., but often, before the final version is distributed, the name is revised slightly or changed.

"Frequently, I'm unsure when the revised report I send him will be the last version. Sometimes, after I send it to him electronically, he makes additional changes before sending it out (usually without changing the file name). These changes are nearly impossible for me to detect, especially months later.

"How can I monitor/track/organize documents through the endless revisions (including name changes) so that I can quickly retrieve the most recently revised version?"

Tonya Oliver, a Microsoft Office User Specialist instructor, recommends taking these three steps:

"1. Save versions. Go to File, Versions. You can save multiple versions of one document under the same name, allowing you to go to a previous version as well as track who saved the last one.

"Be sure to check the box 'Automatically save a version on close' so it won't matter that the boss doesn't rename the document. You can add notes about the changes to that version so when he asks 'months later,' it will be right at your fingertips. If your boss is open to the idea, you can show him how to add his own comments to the version because you won't be able to change them later.

"2. Avoid sending documents via email. Instead, save them to a common drive on your network. Tell the boss where he can retrieve the document. You could put a shortcut to the folder on his desktop. If he chooses to make changes to the document and sends it out, you'll have the changes that he made.

"3. Track changes. Go to Tools, then Track Changes. Click on Highlight Changes. Click on Track Changes While Editing. If you want the changes to appear on the screen or the printed document, click Highlight Changes on Screen or Highlight Changes in Printed Document. Word will track the changes even if these options are turned off, and it'll continue to track the changes until they're either accepted or rejected. If you don't want to see the changes while they're being made, turn off the Highlight Changes on Screen.

"You can review the changes by going to Tools, Track Changes, Accept or Reject Changes. This will take you through all the changes that have been made to the document. Regardless of whether you accept the changes or not, as long as the Highlight Changes in Printed Document is off, your document will print just like a normal document."

The Office Organizer #5

Document sharing: 3 laptop tricks for your next meeting

Use your laptop to squeeze more productivity out of meetings. Here's how:

1. Share data. Say you want to share files, such as a copy of a presentation (so attendees can take their own notes on the PowerPoint slides) or background documents on what's being discussed. Even if you have a wireless connection, sending clunky files by email takes time. Bring a USB flash drive instead**.**

Plug a USB flash drive into an available port on your laptop. Click "Start," then "My Computer." You should see the new drive listed. Double-click the USB Drive

icon to display a list of the files stored on the drive. Work with or copy the files as you normally would, then give the USB drive to others in your group.

2. Brainstorm better, by using MindMeister, a free web-based collaborative mind mapping software for brainstorming and project management (**MindMeister.com**). Say your group is brainstorming about a new product. As the group discusses ideas (timeline, design, marketing, customer conversion, etc.), you type them in, and MindMeister turns the ideas into a visual map. During the following weeks, team members can log in, edit and add to the map. In the end, you can distribute the mind map as a hard copy or an image file.

3. Take and distribute meeting notes digitally. Digital notes are easier to manage, archive and share than traditional paper notes. For Windows users, Microsoft OneNote has a few notable features that may help: The software allows you to organize notes into sections, flag a note so you can quickly identify it later and convert notes into Outlook tasks, appointments and contacts. Download a trial version on **Microsoft.com**.

The Office Organizer #6

How to organize office emails: 4 techniques

Here are four ideas, from Annette Marquis and Gini Courter of Triad Consulting, to help you gain control of your Outlook inbox:

1. Move task-oriented email messages out of your inbox if they will take longer than five minutes to handle. Drag each message to your Task folder and change the subject name, so you'll know its topic at a glance. Then, delete it from your inbox so that all your to-do's are grouped in one place.

2. Drag email to your Calendar to schedule time for yourself to work on it. Estimate how much time the task will take, then drop it into your schedule. (You can also drag it from your inbox to your boss's calendar, if you have permission.)

3. "Add a reminder" when you use a follow-up flag and the message text will turn red when it's overdue. That makes it easy to see pressing tasks at a glance. Once you've completed the task, manually mark it "complete."

4. Develop a color scheme for flags, using two or three different colors. You might designate blue for anything to do with your boss and red for a high-priority project. Even if your inbox is full, you'll be able to spot the hottest items.

The Office Organizer #7

Become an email ninja to survive

Is it even possible to clear out an email inbox—and keep it clear—daily? Yes, but you must be willing to change your behavior, says Michael C. Hyatt, president of Thomas Nelson Publishers, who writes on his blog (**www.MichaelHyatt.com**) about taking control of his own inbox.

"Making the investment is well worth the effort," he says. "When you are not on top of your email, you feel out of control. It can also torpedo your career, since people tend to associate responsiveness with competence. Therefore, becoming an email ninja is an essential survival skill."

Hyatt recommends these four behaviors:

1. Make it your goal to *process* every message (which isn't the same as answering every message), and empty your inbox every day.

2. Read each message once, answering this question quickly: "Am I being asked to do something?" If so, there are only three possible actions:

- ☐ *Do:* Take action on the task now. Follow the two-minute rule: If you can do what's being requested in less than two minutes, do it immediately. "This gets stuff off your to-do list before it ever gets on it," Hyatt says.
- ☐ *Delegate:* Pass the task along to the person best equipped to handle it.
- ☐ *Defer:* Consciously decide you will do the task later. Either add the task to your to-do list or schedule an appointment with yourself to complete it.

If the action isn't actionable or you've already acted on it, you have two options.

- ☐ *Delete:* Determine whether you'll need the information later. If not, go ahead and delete it.
- ☐ *File:* If you think you might need the information later, file it. And this is where Hyatt offers his most important piece of advice: Put everything in one folder called "Processed Mail."

When you set up more complicated filing systems, he insists, it can lead to procrastination. *Example:* You may become bogged down deciding whether to file a message under "Frank" because he sent it to you or "XYZ Project" since that was the subject. And what if the email covers more than one subject?

Forget all that. Let your search program find messages in Processed Mail when you need them, since most programs search for words within a subject line or body text. It's well worth the time saved in filing.

3. Use keyboard shortcuts. Nearly every mouse action has a keyboard equivalent. "My personal goal is to never use the mouse," Hyatt says. "Every time I do, I must take my hands off the keyboard. It doesn't sound like that would cost you much time, but it adds up."

4. Let "email rules" filter the low-priority stuff. "If you haven't discovered email rules, you're missing a great timesaver," Hyatt says. Find it under "Tools" in your Outlook toolbar. Hyatt set up a rule to move cc'd email to a lower-priority "CC Mail" folder. Figure out what low-priority, high-volume emails are distracting you. *Example:* If your LinkedIn group notifications are too frequent, you can set up a rule that any email with "LinkedIn" in the subject line or body automatically goes into your LinkedIn folder. You can do the same with the people you follow on Twitter. Then remind yourself to check lower priority inbox folders on a weekly, rather than daily, basis.

If you're not ready to commit to all of the above steps, you're not alone. Melissa Esquibel, a Microsoft® Certified Trainer says, "The time-consuming job of deleting one email at a time keeps most of us from maintaining our inboxes." She recommends a single, easy tip to quickly reduce the size of your inbox and your sent mail file. "In Outlook 2010, when you view your email as conversations, you'll find a button on the home tab in the delete group called Clean Up. When you choose to clean up a conversation, any redundant emails, which contain replies that are already in the body of other emails, are deleted, thereby reducing the size of your inbox. What's great about this feature is if you choose All Folders, it will also include your sent mail in the cleanup process."

The Office Organizer #8

Lawsuit looming? Be sure to follow email compliance rules

Business people spend on average about 25% of their workdays on email. Not long ago, companies regularly deleted email records from computer systems. But now federal court electronic discovery rules require employers to retain vast amounts of information for use in litigation. Discrimination, harassment and hostile work environment litigation often includes email and instant-message evidence. These communications may include correspondence employees send or receive from clients, customers, fellow employees, family and friends.

Everyone in your organization needs to understand that their communications aren't private. Employees should be made aware that all their emails are official correspondence that can be called into evidence during a lawsuit.

Employment law attorney Mindy Chapman says, “Remember: email = evidence … all employees need to realize that they’re always creating legal documents with the creation of each new email.” She suggests, “Start each email by asking yourself, ‘Does this need to be in writing?’ If not, pick up the phone or walk down the hall.”

A rule of thumb: If you wouldn’t want your mother to read your message on the front page of a newspaper, don’t send it. You should write every email like it's going to be read to a jury … because it just may be.

In the event of a lawsuit, your company should suspend regular data destruction with a “litigation hold.” Your duty to preserve information starts when you receive notice that an administrative or judicial claim has been filed or if your organization has reason to believe that a lawsuit is on the horizon. Save any data prepared by or for employees who will be “key players” in the litigation. When in doubt, *don’t* throw it out.

Note: Yes, you must preserve documents when you know litigation may occur. But that doesn’t mean you must preserve each and every document forever. *(See tip #10 for standard business practice guidelines.)* If in doubt, consult with an attorney before destroying documents and for advice on creating an effective record retention policy.

The Office Organizer #9

Law requires business shredding of personal identity data

Every employer must comply with the Federal Trade Commission’s records disposal rule, designed to protect employees from falling prey to identity theft. The rule stipulates that you must “reasonably” destroy paper and electronic records containing identifiable data on job applicants and employees, such as Social Security numbers and credit histories.

However, the rule doesn’t mandate any specific type of disposal method. For paper files, it suggests shredding them; for electronic files, erasing them or using some other “responsible” means.

Caution: If you don’t properly destroy this data after its statutory retention period expires, you’ll face hefty penalties. Just one mistake here can result in a civil fine or, under the worst-case scenario, a class-action lawsuit.

The Office Organizer #10

Record retention guidelines: What to keep, what to toss

A records retention schedule ensures that your organization keeps the records it needs for operational, legal, fiscal or historical reasons, and then destroys them when they're no longer useful. You may base your records retention schedule on your own experience, research of legal mandates and on what other companies are doing.

Whatever your method, use your retention schedule as a guide, not as an executioner. Retain records longer if litigation, a government investigation or an audit seems likely. In the event that a legal action does arise, immediately cease all disposal activities.

Before you can establish an efficient records management system, you have to know what you have and how long to keep it—legally and for your own business purposes. That's why it's important to inventory your records and draw up a company record retention schedule.

The retention schedule below reflects standard business practices. You must also consider state and local statutes of limitations as well as regulations of government agencies that pertain to your business. State retention statutes vary widely on tax, unemployment and workers' compensation records, as well as on environmental and other requirements. Check with your state and regional authorities for details. As an extra safeguard, have your CPA and your attorney review your records retention timetable before putting it into practice.

RECORD RETENTION SCHEDULE

KEY: "P" = Permanent. Otherwise, figures represent suggested number of years for retaining each type of record.

Accounting----------

Accounts, charged off: 7	Accounts payable ledger: 7
Accounts receivable: 10	Accounts receivable ledger: 10
Balance sheets: 5	Bank deposit records: 6
Bank reconcilement papers: 8	Bank statements: 8

Bills collectible: 7
Bill stubs: 7
Bonds registered: P
Budget work sheets: 3
Capital stock bills of sale: P
Capital stock ledger: P
Cashbooks: 25
Cash sales slips: 3
Check records: 7
Checks, dividend: 10
Checks, paid & canceled: 9
Checks, voucher: 6
Correspondence, accounting: 5
Cost account records: 7
Donations: 7
Earnings register: 3
Estimates, projections: 7
Expense reports, employees: 7
Financial statements, periodic: P
General cashbook: 25
General journal supporting papers: P
Notes, canceled: 10
Payroll register: 7
Plant ledger: P
Property asset summary: 10
Salespeople commission reports: 3
Tabulating cards & magnetic tape: 1
Trial balance, accounts receivable: 3
Uncollectible accounts: 7
Bills of sale of registered bonds: 3
Bonds canceled: 3
Bonds, sales or transfer: 15
Building permits: 20
Capital stock certificates: P
Capital stock transfer records: P
Cash receipts, disbursement records: 10
Charge slips: 10
Check register: 10
Checks, expense: 10
Checks, payroll: 7
Checks, warrants: P
Correspondence, credit & collection: 7
Customer ledger: P
Drafts paid: 8
Entertainment, gifts & gratuities: 3
Expense reports, departmental: 7
Financial statements, certified: P
Fixed capital records: P
General journal: P
General ledger: P
Note ledgers: P
Petty cash records: 3
Profit & loss statements: P
Royalty ledger: P
Stock ledger: P
Traveling auditor reports: 15
Trial balance sheets: P
Work papers, rough: 2

Administrative----------

Audit reports, internal: 10
Audit work papers, internal: 6
Correspondence, accounting: 5
Correspondence, credit & collection: 7
Correspondence, general: 3
Correspondence, production: 2
Correspondence, sales & service: 1
Correspondence, traffic: 6
Inventory cards: 3
Organized charts: P
Research reports: 20
Audit reports, public & government: P
Classified docs: control, inventories,: 5
Correspondence, advertising: 3
Correspondence, technical: 10
Correspondence, personal: 6
Correspondence, purchase: 5
Correspondence, tax: 15
Forms control: 5
Inventory, plant records: P
Requisitions: 1
System & procedure records: P

Advertising----------

Activity reports, media schedules: 5
Correspondence: 5
Estimates: 2
Samples, displays, labels, etc.: P
Contracts: 6 yrs. after termination
Drawings & artwork: P
Market data & surveys: 5
Tear sheets: 3

Corporate----------

Annual reports: P
Bonds, surety: 10
Capital stock ledger: P
Charters, constitution, bylaws & amendments: P
Contracts, govt.: 6 yrs. after term.
Contracts, vendor: 6 yrs. after term.
Dividend register: P
Election ballots: 20
General cashbooks: 25
Licenses, federal, state, local: P
Records of mergers, acquisitions: P
Securities: documents of issuance, listing & registration: P
Stock certificates, canceled: P
Stockholder minutes, resolutions: P
Stockholder reports: P
Authority to issue securities: P
Capital stock certificates: P
Capital stock transfer records: P
Contracts, employee: 6 yrs. after termination
Contracts, union: 6 yrs. after term.
Dividend checks: 10
Easements: P
Election records, corporate: 10
Incorporation records & certificates: P
Permits to do business: P
Reports to SEC: P
Stock applications for issuance: P
Stock & stockholders' records: P
Stockholder proxies: 10
Voter proxies: 15

Executive----------

Correspondence: 2
Projects, notes: P
Speeches, publications: 10
Policy statements, directives: P
Research reports: 20

Insurance----------

Accident reports: 11
Claims, automobile: 10
Claims, loss or damage in transit: 7
Claims, workers' compensation: 10
Expired policy, fidelity: 3 yrs.
Expired policy, group: 3 yrs.
Expired inspection certificates: 3 yrs.
Expired policy, life: 3 yrs.
Expired policy, property: 3 yrs.
Expired policy, workers' comp: 3 yrs.
Appraisals: P
Claims, group life & hospital: 4
Claims, plant: P
Expired policy, accident: 3 yrs.
Expired policy, fire: 3 yrs.
Expired policy, hospital: 3 yrs.
Expired policy, liability: 3 yrs.
Expired policy, marine: 3 yrs.
Expired policy, surety: 3 yrs.

Legal----------

Affidavits: 10
Claims & litigation of torts
& breach of contract: P
Patents & related data: P
Charters: P
Copyrights: P
Mortgages: P
Trademarks: P

Manufacturing----------

Authorities for sale of scrap: 3
Blueprints: 30
Correspondence, production: 2
Credit ratings & classifications: 2
Draftings & tracings, original: P
Inventory records: 7
Invoices, received: 7
Journals: P
Operating reports: 10
Production reports: 6
Receipts, delivery: 3
Specifications, customer: P
Time & motion studies: P
Bills of material: 5
Correspondence, engineering: 10
Credit memoranda: 5
Drafting records: 8
Inspection records: 5
Invoice copies: 7
Job records: 10
Ledgers: P
Order register: 6
Quality control reports: 5
Reliability records: P
Stores' issue records: 3
Work orders: 5

Personnel----------

Accident reports, injury claims: 7
Attendance records: 4
Correspondence: 6
Disability & sick benefits records: 4
Employee contracts: 7
Fidelity bonds: 3
Garnishments: 7
Injury frequency charts: 10
Paychecks: P
Pension plan: P
Pension plan, claims: P
Rating cards: 5
Salespeople auto records: 2
Time cards: 7
Union (collective bargaining)
agreements after termination: P
Applications, changes, terminations: 3
Clock records: 4
Daily time reports: 5
Earnings records: P
Employee service records: P
File, individual employee: 3
Health & safety bulletins: 4
Insurance records: group, employee: 6
Payroll records, after termination: P
Pension plan, applications: P
Pension plan, correspondence: P
Salary & rate changes: 10
Salespeople expense accounts: 4
Training manual: P
Withholding, exemption certificate: 3
Workers' compensation reports: 11

Plant and Property----------

Appraisals: P
Deeds, titles: P
Inventory records: 16
Damage reports: 7
Depreciation schedules: P
Leases: P

Maintenance & repair, buildings: 10
Maintenance & repair, machinery: 5
Plans & specifications: P
Plant equipment records: P
Purchase, lease records: 1
Sales: 7
Space allocation records: 2
Taxes: P
Water rights: P

Purchasing----------

Acknowledgments: 3
Bids, awards: 3
Contracts: 6 yrs. after termination
Correspondence: 5
Exception notices: 6
Orders: 7
Purchase orders: 3
Purchase requisitions: 1
Quotations: 3
Receiving reports: 6
Receiving slips: 4
Vendors' contracts: P

Sales and Marketing----------

Claims (loss or damage): 5
Complaints: 5
Contract progress reports:
6 yrs. after termination
Contracts, customer:
6 yrs. after termination
Contracts, reps, agents, distributors:
6 yrs. after termination
Correspondence: 1
Guarantees, warrantees: 6
Discount rates: 5
Invoices, copies: 6
Invoices received: 7
Mailing & prospect lists: 2
Market research: P
Market surveys: 5
Orders acknowledgment: 4
Orders filled: 8
Price lists: P
Shipping notices & reports: 4
Tax-exempt sales: 5

Taxation----------

Agent's reports: P
Annuity or deferred payment plan: P
Correspondence: 20
Depreciation schedules: 3
Dividend register: P
Employee withholding certificates: 8
Excise reports: 5
Exemption status: P
Inventory reports: 16
Real estate: 15
Sales & use: P
Social Security: P
Tax bills & statements: P
Tax returns & working papers: P

Traffic----------

Aircraft operating & maintenance: 10
Bills of lading: 3
Delivery reports: 3
Employee travel: 1
Export declarations: 4
Freight bills: 5
Freight claims: 5
Leases: 6
Manifests: 1
Receiving documents: 5
Routing records: 1
Shipping instructions: 6

Shipping tickets: 6	Title papers: P
Tonnage summaries: P	Tracer reports: P
Vehicle inspection reports: 3 months	Vehicle operation & maintenance: 4

Source: Records Management Handbook, Fellowes Inc., Bankers Box Storage Products. Excerpted from the special report, *Taming the Paper Monster: Records Management, Compliance and File Security*, published by Business Management Daily, a division of Capitol Information Group, Inc.

Time to go paperless?

Many offices are moving away from paper to protect the environment, spend less on printing supplies and reduce office clutter. Going paperless can also keep information more secure. Working in a paperless environment is a breeze, but getting there is not. Here are four tips to help you make the change.

1. **Use the cloud.** All that data has to live somewhere. If stored on a local computer, you risk crashes and will have limited access to information outside the office, cautions Andy Brasfield, co-founder of Southeastern Laser, a printing supply company that specializes in paperless technology. Conversely, a cloud-based solution such as Dropbox, Brasfield's preferred service, can allow access to documents from anywhere, requires no backup and can have different permission levels.

2. **Start with accounting.** "Since accounting is probably the one office function with the most need for good data, going paperless with your bookkeeping, billing, accounts receivable and accounts payable will be the most cost effective and efficient up front," says David Evans, CPA, Alloy Silverstein.

3. **Conduct paperless meetings.** "We go to the conference room and use our large LCD screen to conduct the meeting and go over key figures, reports, initiatives and projects," says Jovim Ventura, founder of InoPrints.com. His company encourages note taking, making to-do lists and setting appointments in Notepad, Google Tasks and Google Calendar, respectively. This gets rid of handwritten meeting notes and multiple Post-its afterward.

4. **Discourage printing.** Remove all desktop printers and locate one or two heavy-duty printers in a central location, recommends Bill Horne, owner of William Warren Consulting. Horne also recommends tracking printing to each employee and notifying them that usage will be monitored.

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10 Secrets to an Effective Performance Review: Examples and tips on employee performance evaluation, writing employee reviews, a sample performance review and employee evaluation forms.

Learn how to conduct positive, valuable assessments that lead to maximizing staff performance and helping your employees achieve their professional goals and your organization's objectives. Use Business Management Daily's practical advice for writing employee reviews and conducting performance evaluations. Don't forget to reference our sample performance review and employee evaluation forms for your own staff assessments.

http://www.businessmanagementdaily.com/EffectivePerformanceReview

Workplace Conflict Resolution: 10 ways to manage employee conflict and improve office communication, the workplace environment and team productivity

Learn how to manage employee conflict and improve office communication and team productivity. Disputes between employees are inevitable…left unresolved, they can disrupt your department's productivity, sap morale and even cause some good employees to quit. Learn 6 steps for managing "difficult" employees, what to do when employees resent another's promotion, learn when and how to step in to referee disputes, and much more.

www.businessmanagementdaily.com/WorkplaceConflictResolution

Maternity Leave Laws: 7 guidelines on pregnancy discrimination law, state maternity regulations, pregnancy disability leave, plus a sample maternity leave policy

It's important to know what you must do—and what you can't do (or say)—under federal anti-discrimination and maternity leave laws. And it's vital to double-check state maternity leave statutes, which may provide more liberal leave benefits. While no federal law requires you to provide paid maternity leave, most employers must comply with the pregnancy discrimination law and FMLA maternity leave regulations. Here are 7 guidelines on how best to comply with maternity leave laws, plus a sample leave policy you can adapt for your own organization.

www.businessmanagementdaily.com/MaternityLeaveLaws

The Office Organizer: 10 tips on file organizing, clutter control, document management, business shredding policy, record retention guidelines and how to organize office emails

Learn how to keep your office operations running smoothly—and ward off chaos and legal trouble—with practical document management techniques for administrative professionals, office managers and HR professionals.

www.businessmanagementdaily.com/OfficeOrganizer

Best-Practices Leadership: Team management tips and fun team-building activities to boost team performance, collaboration and morale

Learn new team management tips and team-building activities to boost team performance, collaboration and morale. Take our leadership assessment exercise to gauge your own performance as a team manager. See how businesses of all sizes are getting creative with team-building icebreakers and activities. Fight off team complacency with 5 strategies for making team-building exercises part of your daily routine.

www.businessmanagementdaily.com/LeadershipTeamManagement

Employment Background Check Guidelines: Complying with the Fair Credit Reporting Act, conducting credit background checks and running a criminal check to avoid negligent-hiring lawsuits

Employment Background Check Guidelines shows employers and HR professionals how to properly conduct reference/background checks, select third-party background firms and why screening candidates online on social networking sites is legally risky business. Don't allow your organization to risk being held liable for "negligent hiring" or "failure to warn" should an employee turn violent on the job.

www.businessmanagementdaily.com/BackgroundCheckGuidelines

Salary Negotiating 101: 7 secrets to boosting career earnings, negotiating a raise and striking the best deal in a job offer negotiation

Think you deserve a raise, but are afraid to walk into your boss's office and ask? Don't let ineffective negotiation skills hold you back. Employees at all levels can boost their career earnings by following the rules on negotiating a raise, hashing out the best pay package in a job offer negotiation and knowing their market value.

www.businessmanagementdaily.com/SalaryNegotiating101

FMLA Intermittent Leave: 5 guidelines to managing intermittent leave and curbing leave abuse under the new FMLA regulations

One of the biggest employer complaints about the Family and Medical Leave Act (FMLA) is the productivity problems caused by employees' use—and abuse—of FMLA intermittent leave. The problem: Employees with chronic health problems often take FMLA leave in short increments of an hour or less. The Department of Labor took steps to help minimize workplace disruptions due to unscheduled FMLA absences by saying that, in most cases, employees who take FMLA intermittent leave must follow their employers' call-in procedures for reporting an absence. Amend your organization's policies, update your employee handbook and revisit how you track FMLA intermittent leave with these 5 guidelines.

www.businessmanagementdaily.com/FMLAIntermittentLeave

Overtime Labor Law: 6 compliance tips to avoid overtime lawsuits, wage-and-hour Labor audits and FLSA exemption mistakes

Employers, beware: The Department of Labor's Wage and Hour Division reports that wage-and-hour labor litigation continues to increase exponentially. Federal class actions brought under the Fair Labor Standards Act (FLSA) outnumber all other types of private class actions in employment-related cases. Use this special report, Overtime Labor Law: 6 compliance tips to avoid overtime lawsuits, wage-and-hour Labor audits and FLSA exemption mistakes, to review your overtime pay policy and double-check your FLSA exempt employees' status. Expecting a visit from a DOL auditor? Get prepared by taking the self-audit at the end of this report.

www.businessmanagementdaily.com/OvertimeLaborLaw

Office Communication Toolkit: 10 tips for managers on active listening skills, motivating employees, workplace productivity, employee retention strategies and change management techniques

A manager's job is 100 times easier and more rewarding when his or her employees are performing like a well-oiled machine. But when that machine runs slowly or breaks down entirely, a manager's job becomes exponentially harder. The best managers are the best listeners … listen to our 10 tips and maximize office communication skills and bolster workplace productivity.

www.businessmanagementdaily.com/OfficeCommunicationToolkit

Workplace Violence Prevention Toolkit: HR advice, guidelines and policies to keep your workplace safe

Unfortunately, in the wake of a spate of workplace shootings, HR professionals and managers nationwide must consider the horrific possibility of violence erupting at their own facilities and events. To help employers prevent tragedy, this toolkit offers business advice, guidelines and policies aimed at keeping workplaces safe from employee violence. Learn prevention strategies, tips on identifying potentially violent workers, managerial advice on maintaining a safe workplace. It includes two sample anti-violence policies, adaptable for use in any company, plus checklists to use in case violence erupts.

www.businessmanagementdaily.com/WorkplaceViolencePrevention

14 Tips on Business Etiquette: Setting a professional tone with co-workers, clients and customers

For organizations and employees alike, recognizing the critical link between business protocol and profit is key to your success. Learn how to confidently interact with colleagues in ways that make you and your whole organization shine. Discover best practices on making proper introductions; cubicle etiquette; "casual dress" rules; handshake protocol; guest etiquette; workplace behavior faux pas; business dining etiquette, office wedding invites and other co-worker special occasions; business letter and email protocol—and even how your office decorations may affect your professional image.

www.businessmanagementdaily.com/BusinessEtiquette101

12 Ways to Optimize Your Employee Benefits Program: Low-cost employee incentives, recognition programs and employee rewards

If you've had to cut pay and staff and now expect more from those who remain, it's vital to revamp your employee recognition and rewards program. Employers can double their rewards and recognition efforts in innovative, cost-efficient ways with employee-of-the-month awards, employee incentive pay, employee appreciation luncheons, more time off, shopping sprees, wellness incentive contests, plus employee rewards customized to motivate Millennials, Gen Xers, Baby Boomers and the Matures. Now is the time to get clever with your employee recognition programs. This report shows you how with great ideas offered up from our Business Management Daily readers.

www.businessmanagementdaily.com/EmployeeBenefitsProgram

The Bully Boss Strikes Again! How to deal with bosses who make crazy requests

And you thought your boss was unreasonable? Bet he never asked you to perform oral surgery or fill in for the bomb squad. Talk about "other duties as assigned!" Even if your direct supervisor swamps you with petty tasks and doesn't appreciate all you do, you can always "manage up" to make sure the boss's boss knows your worth. This report includes practical advice on how to manage a toxic boss along with dozens of outrageous stories about bully bosses.

http://www.businessmanagementdaily.com/BullyBoss

Microsoft Email: Outlook Tips & Training: How to improve productivity by effectively employing under-used features already at your fingertips

We all use Outlook. It's easy. You can answer email, keep your appointments and your calendar, and save your files in various folders. But are you using it to manage your entire workflow? You can. Melissa P. Esquibel combines her 25+ years of experience in information technology with a background in training, technical writing and business risk analysis to move beyond email and help you understand Outlook's amazing workflow benefits. You'll discover how to get more out of Outlook than you ever dreamed possible with this hands-on road map to Outlook that can send your productivity skyrocketing.

http://www.businessmanagementdaily.com/MicrosoftEmailOutlook

17 Team Building Ideas: The team building kit for managers with team building exercises, activities and games to build winning teams today!

With employees still reeling from workplace budget cuts, now's a great time for new team building ideas. No, you don't need an expensive round of paintball to gain the benefits of team building exercises, but you do need to squeeze the most out of them. This report provides teamwork examples, exercises and tips for leading winning teams. Go from being a manager who oversees people to a leader who molds them into winning teams with these 17 team building ideas.

www.businessmanagementdaily.com/TeamBuildingIdeas

10 Time Management Tips: A how-to guide on efficiently managing your time through effective delegating, calendar management and using productivity tools

In this era of downsizing and the quest for efficiency, businesses of all sizes are asking employees to take on extra tasks to boost productivity. Has your job turned into one of those "stretch jobs"? If so, you may be looking for a better way to get more done in less time, reduce stress and stop burning the midnight oil. Read about calendar management, keyboard shortcuts, running productive meetings, setting up agenda templates and using tech tools for project management with these 10 time management tips. Learn to prioritize your tasks and stop working in a crisis mode all the time

www.businessmanagementdaily.com/TimeManagementTips
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BusinessManagement DAILY

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At Business Management Daily, we're driven to help organizations and individuals succeed. That's why we deliver plain-English, actionable advice to high-performers at over 80,000 companies of all sizes across hundreds of different industries.

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