

Office Organized: The Records Management Show

Episode 1: Bob's Big Mess



Meet Bob.¹ Bob just can't take it any more. He's overworked, underpaid, and he can't find the report that his boss wants. He knows that it is somewhere in his office, but he just can't seem to find it. He knows that he had it right here on his desk ... somewhere. As you can see, he has just put his head down and given up.

Bob is a tough case. But he's no match for his department's records management team.

Let's meet the team now.

The Records Management Team



This is Mary. She is the Records Coordinator for Bob's department.



This is Joan. She is a Records Technician in Bob's department, and is Mary's right hand woman.



This is Brian. Brian is the Administrative Assistant in Bob's division. He will be helping Mary and Joan with this project.

Mary, Joan and Bob have two days and \$20 worth of office supplies to transform Bob's office from terrible to tidy.

Day 1

The team arrives in Bob's office to assess the situation. Bob moves a bunch of papers, files, and books off of the visitors' chairs and adds them to the piles on the floor. "Sorry about the mess," he says, "I need a bigger office for all of my stuff."

Sorting through the Mess

Mary lays out a plan. They begin with Bob's desk and work their way from one side of the office to the other, leaving no paperclip unturned. While Brian runs to find a larger recycling bin, Mary tells Bob to sort his papers into three groups:

¹ Names have been changed and models have been used in the pictures. Actually, this bulletin is a complete work of fiction, but it reflects what really happens in government departments.

- Stuff that he is working on right now.
- Stuff that he is not working on any more.
- Transitory material that he is keeping “just in case.”

“You don’t need your own copy of a three year old report that is already filed in the office filing system and posted on the department’s web site,” she tells him. “It is already available to you when you need it.”

Bob looks on in horror while Joan starts tossing transitory records into the recycling bin. “Twenty-one drafts of the same report ... gone!” she calls out.

“Hey,” says Brian, “here are those missing files you wanted last week. You’ve had them all along. Why didn’t you put an out card in the filing cabinet? It would have saved me a lot of grief.”

“But how am I supposed to find anything?” Bob wails. “I had everything organized in those piles. I knew exactly where everything was! Now you’ve moved it all on me! I’ll never find it again!”

“So, you knew where everything was, did you?” replies Mary. “Then why did those files go missing? And why couldn’t you find that report for your boss?”

Day 2

Mary and Joan march into Bob’s office, armed with pens, paper, file folders, and a binder containing a copy of ARCS and the department’s ORCS.²

Mary hands the binder to Bob. “This is your guide to the filing system. You won’t use all of it, but you are going to become very familiar with some of the sections.”

They begin with the pile of records that Bob is working on right now. They list the files that he has on an inventory sheet. Then Bob and Joan start filing his loose papers, while Mary tackles the pile of closed project files.

Joan shows Bob how to use the ARCS manual and how to assign classification numbers to his files. “Go to Brian when you need a new file,” she tells Bob. “Brian will look up the ARCS or ORCS number and record the new file on our file list.”

By the end of the day, Bob’s files are in order and his desk is clean. Current files are classified and organized in his filing cabinet. Out cards have been put in the division’s central filing

² ARCS is the Administrative Records Classification System. ORCS is the Operational Records Classification System.

cabinets to keep track of the files that Bob has in his office. Transitory records have been put in secure recycling bins for shredding.

Bob looks around in awe. “I can’t believe it. Look, I can see my desk! I can find everything now! And here’s that report for my boss! How can I ever thank you guys?”

Tips and Tricks

- Review the files at your desk at least every six months. If you do not need them any more, return them to the central filing cabinets in your office.
- Review the papers on your desk and the e-mails in your e-mail inbox regularly, and delete or recycle transitory records.
- Talk to your records coordinator for help with managing your records!

For more information, contact your department’s records coordinator, or contact the Records Management Unit at 920-3009 or 873-7446