

# Common Office Headaches & How to Cure Them

Reinvent your processes to spur growth and make your workflows easier.

By *Andreas Rivera*

**T**here's plenty of stressful busywork in a fast-moving office. But you can cure most office headaches and get back to more important work with these solutions:

## Your Desk (or Desktop) Is Cluttered

You have a basket on your desk labeled "To Do" filled with forms, invoices, and documents that need to be processed or archived. It's simple work – but time-consuming. You'd rather be working on bigger projects, but falling behind on the paperwork means that basket starts overflowing.

It's not limited to physical paper. Plenty of people also have document folders or even desktops on their computer that feature hundreds of unorganized files that need to be sorted.

It's time to streamline that busywork. Rather than manually sorting your documents into the system, turn to automation. Whether you're handling physical paperwork or digital files, optical character recognition (OCR) will make the filing task exponentially faster.

Intelligent OCR uses templates of your most common forms to collect and route data to the right location in your document-management system. With the right scanner, you can digitize your documents in bulk.

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## Someone Needs an Old, Obscure Document

A client (or a co-worker) requests a specific document, but you don't know where it's located. For all you know, it may be lying forgotten on someone's desk or misfiled in a random binder.

Just as frustrating is when the document is a digital file, but you don't know the file name, so searching and browsing for it is difficult. This is why a central repository for all documents is necessary.

Once you file documents into a document-management system, you'll be able to find your files fast. When you file documents with metadata, you can search for whatever information you're looking for even if you don't know the file name. Full-text search allows you to find your docs with just a few search terms you know are within the content of the document.

## Processes Take Too Long

Do many of your tasks get held up because you're waiting for others to do their part? Sometimes you may not even know who's holding things up. Whether you're waiting for an approval or someone to leave feedback, simple tasks can get complicated when there's a line of co-workers who need to be involved.

Adding automation can completely change the way things get accomplished. Intuitive workflow tools can route documents to the right people and notify them of the tasks they need to complete. With document management, you have an





overview of how your workflows are proceeding, giving you insight into how well your processes are working and where they keep getting held up.

## There Are Too Many Repetitive Tasks in the Day

If you're in charge of creating new records, it can be frustrating when you have to recreate the same folder structure each time with all the corresponding folders and files. That's why folder templates for digital records are so necessary. However, even if you create a template that you can copy and paste, a normal desktop folder doesn't come with the necessary security and compliance policies your records need.

A document-management system will craft templates for your filing system while adding security settings that will be applied whenever you use the templates. You can also add common files and forms that will be copied each time the template is used. Best of all, if you need to make changes to the folder structure, the edits you make can be applied to all folders that use that template.

## You're Preparing for an Audit

Audits are always stressful. Depending on the compliance standards required, audits can come with hefty fines and other penalties, so it's in your best interest to ensure that all your records are up to standard.


One reason audits are such a pain is because they can take a long time to complete. It's an auditor's job to dive into an organization's archives to review records and ensure everything is accounted for and organized according to

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specified standards. Auditors have visibility into all file versions and can check if a file is protected with all the necessary policies such as “retention” and “write once, read many (WORM).”

Invest in a system that can create a specialized account for the auditors. Such a system will give the auditors access to all the pertinent files they need to review. At the same time, it will secure all other data. So, rather than giving them the key to your filing cabinet, you can give them a password instead.

## You Need Paperwork While in the Field

If your job involves hitting the road and doing work in the field, but still requires access to certain documents, you don't want to haul a big box of files wherever you travel. For easy, secure access to your documents, cloud storage is a must. If protecting your essential data is a priority, then you need a document-management system that's accessible through the cloud and secured with bank-level encryption. 

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## Take Care of Your Data

Organize your information so it's at hand when you need it. See articles such as these at [NonprofitWorld.org](https://www.nonprofitworld.org):

**Why Clutter Hurts Your Leadership & What to Do About It** (Vol. 36, No. 1)

**Seven Questions You Must Address to Thrive in the Digital Age** (Vol. 35, No. 1)

**Streamline Your Organization – & Raise More Money – with Online Forms** (Vol. 36, No. 4)

**The Dashboard Difference: How a Cutting-Edge Technology Tool Is Changing the Game** (Vol. 35, No. 3)

**Get Ready for a Better Audit** (Vol. 30, No. 2)

**The Cloud: Software Transformation & Evolution of the Workforce** (Vol. 33, No. 1)

**How to Get It Done** (Vol. 25, No. 6)

**The Top Five Digital Tools You Should Be Using Right Now** (Vol. 34, No. 2)