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COURSE BROCHURE

Advanced E-Secretariat and Digital Office Training Course

23 August – 3 September 2027
Rome

Advanced E-Secretariat and Digital Office Training Course

Ref: 303_10103 **Date:** 23 August – 3 September 2027 **Location:** Rome **Fees:** 11100 GBP

Advanced E-Secretariat and Digital Office training is a 2-week training course for office managers and secretaries moving their office to digital workflows, and it produces a paperless office migration plan with folder structure, approval workflows and retention rules. Offices now run on shared drives, cloud workspaces and electronic approvals, yet many still file and sign as if on paper. Jupiter Prime Training runs this course for administrators leading that switch.

Why E-Secretariat and Digital Office Matters Now

Hybrid working, cloud workspaces and expectations of instant approval have pushed office administration online, while records still need to be found, trusted and kept for the right period. Leadership wants faster sign-off and less printing; auditors and legal advisers want reliable audit trails and defensible disposal; staff want files they can locate in seconds. An office that designs its digital filing, e-signature routes and retention rules deliberately gains speed and evidential confidence, whereas one that simply scans paper creates cluttered drives, lost versions and exposed personal data. The course rests on recognised records management, electronic signature and information security principles, applied in general terms.

Who Gains Most from E-Secretariat and Digital Office

- Administrators responsible for shared drives, folder structures and document repositories
- Secretaries who route correspondence, approvals and signatures for managers
- Office coordinators who run shared calendars, meeting rooms and resource bookings
- Staff tasked with digitising forms, registers and paper archives
- Administrators who look after access rights, sharing and retention in cloud workspaces

A department about to retire its paper registers gains most when its office manager, secretaries and records staff attend together and agree one filing and approval design.

E-Secretariat and Digital Office Capabilities

Participants leave able to replace paper routines with digital ones that are faster to use and easier to defend in an audit.

- Design a folder taxonomy, naming convention and permission matrix — staff who must find files quickly
- Specify electronic signature and approval routes with audit trails — managers and auditors relying on sign-off
- Build electronic forms and rule-based workflows — requesters waiting on leave, purchase and travel decisions
- Apply information classification and access reviews to cloud sharing — data owners and external partners
- Calculate retention periods and disposal triggers for record classes — legal advisers and archivists
- Assess staff readiness and sequence the migration in waves — leadership sponsoring the paperless switch

Key E-Secretariat and Digital Office Terms

- Electronic document management system — software that stores, versions, indexes and controls access to an organisation's digital documents.
- Metadata — descriptive fields attached to a file, such as author, type and date, that make it searchable and manageable.
- Advanced electronic signature — a signature tied to one identified signer and to the document, so later changes are detectable.
- Audit trail — an automatic log of who viewed, edited, approved or signed a record and when.
- Retention schedule — a table setting how long each class of record is kept and what happens at the end.
- Legal hold — an instruction suspending disposal of records relevant to a dispute, investigation or audit.

E-Secretariat and Digital Office Day by Day

Day 1: The Digital Office Shift

- Paper-to-Digital Maturity Map — Where the Office Stands Today
- E-Secretariat Role Redesign — From Typing Pool to Workflow Steward
- Hybrid Working Pressures — Remote Access, Mobility and Shared Calendars
- Sector Contrasts — Hospitals, Universities, Engineering Firms and Ministries
- Paper Volume Audit — Printing, Storage Rooms and Courier Runs Measured

Day 2: Electronic Document Management Foundations

- Electronic Document Management System Components — Repository, Metadata and Search
- Document Lifecycle Stages — Draft, Approved, Published, Archived and Destroyed
- Version Control Rules — Check-Out, Major and Minor Versions
- Metadata Schemes for Office Records — Fields That Make Search Work
- Scanning and Capture Standards — Resolution, OCR and Quality Checks

Day 3: Digital Filing and Naming Conventions

- Folder Taxonomy Design — Function-Based Versus Department-Based Structures
- File Naming Convention — Dates, Version Codes and Descriptive Elements
- Shared Drive Clean-Up — Duplicates, Orphan Files and Dead Links
- Access Permission Matrix — Read, Edit and Owner Rights by Role
- Findability Testing — Timed Retrieval Exercises With Real Users

Day 4: E-Signatures and Digital Approvals

- Electronic Signature Types — Simple, Advanced and Qualified Signatures Compared
- Digital Approval Routes — Sequential, Parallel and Delegated Sign-Off
- Audit Trails for Signed Documents — Timestamps, Identities and Integrity
- Policy Choices on Wet Ink — Which Documents Still Need Paper
- Signer Experience — Mobile Signing, Reminders and Rejection Handling

Day 5: Shared Calendars and Digital Correspondence

- Shared Calendar Architecture — Delegate Access, Room Booking and Resource Calendars
- Meeting Scheduling Etiquette — Availability Polls, Time Zones and Buffers
- Digital Correspondence Register — Incoming, Outgoing and Internal Memos Logged
- Shared Mailbox Rules — Ownership, Tagging and Response Standards
- Email-to-Repository Filing — Moving Decisions Out of Inboxes

Day 6: Workflow Automation

- Process Mapping for Automation — Swimlanes, Triggers and Hand-Offs
- Electronic Forms Design — Leave Requests, Purchase Requisitions and Travel Claims
- Rule-Based Routing — Conditions, Escalations and Deadlines
- Low-Code Automation Options — Capabilities, Limits and Ownership
- Automation Testing — Edge Cases, Exceptions and Rollback Paths

Day 7: Secure Cloud Collaboration

- Cloud Collaboration Models — Co-Authoring, Team Sites and External Sharing
- Information Classification for Shared Files — Public, Internal and Restricted
- Access Reviews — Removing Leavers and Expired Guest Accounts
- Phishing and Account Takeover Defence — Multi-Factor Authentication Habits
- Data Protection Duties — Personal Data in Shared Workspaces

Day 8: Retention Rules and Digital Archiving

- Retention Schedule Construction — Record Classes, Triggers and Periods
- Legal Hold Procedures — Suspending Disposal When Disputes Arise
- Digital Archive Formats — Long-Term Readability and Format Migration
- Defensible Disposal — Approvals, Logs and Certificates of Destruction
- Backup Versus Archive — Recovery Needs and Evidential Value

Day 9: Leading the Paperless Change

- Stakeholder Readiness Assessment — Champions, Sceptics and Heavy Paper Users
- Training Plan for Office Staff — Short Guides, Clinics and Floor Walkers
- Migration Sequencing — Pilot Unit, Waves and Cut-Over Dates
- Adoption Metrics — Print Volumes, Retrieval Times and Approval Cycle Times
- Resistance Handling — Addressing Fear of Lost Files and Control

Day 10: Practising the Paperless Office Migration Plan

- Folder Structure Build for a Live Department — Peer Review
- Approval Workflow Prototype — Electronic Form and Routing Tested
- Retention Schedule Draft — Record Classes Mapped to Disposal Rules
- Cloud Sharing Policy Exercise — Classification and Access Decisions
- Paperless Office Migration Plan — Structure, Workflows and Retention Rules Finalised

Applying E-Secretariat and Digital Office After the Course

- Pilot the new folder taxonomy and file naming convention in one shared drive and time retrieval before and after.
- Convert one paper approval, such as leave or purchase requests, into an electronic form with digital routing and an audit trail.

E-Secretariat and Digital Office Questions FAQ

What is advanced e-secretariat and digital office practice and why does it matter now?

Advanced e-secretariat and digital office practice is running correspondence, filing, approvals and calendars through digital systems instead of paper. It matters now because hybrid teams need instant access, while records must remain trustworthy, secure and retained correctly.

Which roles gain most from e-secretariat and digital office training?

Office managers, executive secretaries and administrative coordinators leading a move from paper gain most, along with records staff. Hospitals, universities, engineering firms and government offices with heavy paper registers see the clearest gains.

How does e-secretariat and digital office training differ from general office management training?

It focuses on the digital machinery of the office. General office management courses cover routines, people and suppliers; this course covers document management systems, naming conventions, e-signatures, workflow automation, cloud sharing and retention rules.

What do you bring back from e-secretariat and digital office training?

You bring back a paperless office migration plan containing a folder structure, naming convention, approval workflows, a retention schedule draft and a sequenced roll-out for your department.

E-Secretariat and Digital Office: The Way Forward

The paperless office migration plan sets out the folder structure, approval workflows, retention rules and roll-out waves for one office. Its first use is choosing the pilot unit and the paper process to retire first. Office managers, secretaries and records staff work from it, and it is worth revisiting after the pilot, when retrieval times and approval cycles show what to adjust.