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COURSE BROCHURE

Office Document Management and Filing Plan Training Course

29 August – 2 September 2027
Online

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Registered in the United Kingdom and Saudi Arabia

Office Document Management and Filing Plan Training Course

Ref: 671_25044 **Date:** 29 August – 2 September 2027 **Location:** Online **Fees:** 1900 GBP

Office Document Management and Filing Plan is a 1-week training course for administrators, secretaries and office document coordinators, in which each participant drafts a departmental filing plan for their own department. Shared drives, inboxes and collaboration sites now hold most office evidence. Jupiter Prime Training runs this course for support staff who keep everyday office papers findable.

Why Office Document Management and Filing Plan Matters Now

Three forces shape office filing today. Hybrid working spreads letters, minutes and contracts across email, shared drives and cloud folders, each with its own habits. Auditors, legal advisers and new managers expect any memo or approval to be produced quickly and in its final form. Offices that file with agreed folder structures and file names answer requests in minutes; others duplicate effort, keep superseded drafts and expose personal data to the wrong readers. The course draws on ISO 15489-1 for records management concepts and principles, and on ISO 16175 for what filing software should do.

Who Gains Most from Office Document Management and Filing Plan

- Administrators who set up and tidy departmental shared drives and folders
- Secretaries who file correspondence, minutes and approvals for senior managers
- Office coordinators who keep contracts, purchase papers and staff forms in order
- Assistants who move paper files into scanned and digital storage
- Supervisors of front offices who decide who may open which folders

A department gains most when its secretary, administrator and office coordinator attend together and agree one folder structure before returning.

Office Document Management and Filing Plan Capabilities

Participants leave able to turn untidy folders and inboxes into an orderly filing arrangement that colleagues follow without reminders.

- Design a folder structure that mirrors departmental functions — heads of department
- Apply consistent file naming rules to letters, minutes and forms — colleagues searching shared drives
- Specify a small set of metadata fields for office documents — system administrators
- Distinguish drafts from final versions using version labels — managers signing approvals
- Apply keeping periods and disposal steps to routine papers — legal and audit reviewers
- Set folder access rights by role and sensitivity — staff handling personal data

Key Office Document Management and Filing Plan Terms

- Filing plan — an agreed list of folders, grouped by departmental function, that tells staff where each type of document belongs.
- Naming convention — a fixed pattern for file names, such as date, document type and subject, used by everyone in an office.
- Metadata — descriptive details stored with a file, such as author, date, subject and status, that make it easier to find.
- Version label — a marker such as draft 0.2 or final 1.0 showing which copy of a document is current.
- Keeping period — the length of time a type of office document is held before review, transfer or destruction.
- Access permission — a setting that controls who may view, edit or delete files in a folder.

Office Document Management and Filing Plan Day by Day

Day 1: Office Papers as Evidence

- Document Versus Record Distinction — What Must Be Kept as Evidence
- ISO 15489-1 Principles for Office Staff — Why Filing Rules Matter
- Inventory of Departmental Document Types — Scope of the Filing Effort
- Paper, Email and Shared Drive Mapping — Where Documents Currently Sit
- Common Filing Failures and Their Costs — Priorities for Improvement

Day 2: Building the Folder Structure

- Function-Based Folder Hierarchy — Grouping by Activity Not by Person
- Folder Depth and Breadth Rules — Speed of Finding Files
- Personal Versus Shared Folder Boundaries — Ownership of Working Files
- Email Filing into Shared Folders — Keeping Correspondence with Its Matter
- Paper File Index and Box Labelling — Linking Physical and Digital Copies

Day 3: Names, Metadata and Versions

- File Naming Pattern Design — Consistency Across Letters, Minutes and Forms
- Date and Reference Formats in Names — Sorting and Retrieval Order
- Core Metadata Field Set — Search Within Office Software
- Draft, Review and Final Version Labels — Which Copy Managers Sign
- Check-Out and Co-Authoring Habits — Avoiding Conflicting Edits

Day 4: Keeping, Access and Disposal

- Keeping Period Table for Office Papers — When Documents May Leave
- Disposal and Transfer Steps — Safe Destruction or Archive Transfer
- Role-Based Folder Permissions — Who Opens Confidential Files
- Personal Data in Office Files — Handling HR and Client Details
- ISO 16175 Expectations for Filing Software — Choosing System Features

Day 5: Practising the Departmental Filing Plan

- Applying the Function Map to a Live Department — Agreed Top Folders
- Testing Naming Rules on Sample Files — Colleague Feedback
- Assigning Keeping Periods and Permissions — Sign-Off by the Manager
- Migration Steps from Old Drives — Order of Moving Files
- Completing the Departmental Filing Plan — Handover to Colleagues

Applying Office Document Management and Filing Plan After the Course

- Run a one-week trial of the new naming convention on one shared folder and record where colleagues still deviate.
- Hold a short clean-up session to move superseded drafts out of live folders using the version labels taught.

Office Document Management and Filing Plan Questions FAQ

What is Office Document Management and Filing Plan training and why does it matter now?

It is practical training in organising everyday office documents so they can be found and trusted. An agreed filing plan saves search time and protects final versions.

Which roles gain most from Office Document Management and Filing Plan training?

Administrators, secretaries and office coordinators gain most, because they create and file most departmental papers.

How does Office Document Management and Filing Plan training differ from a document control course for projects?

It focuses on letters, minutes, contracts and forms in ordinary offices rather than engineering deliverables, transmittals and revision codes.

What do you bring back from Office Document Management and Filing Plan training?

You bring back a drafted filing plan for your own department, ready to agree with your manager.

Office Document Management and Filing Plan: The Way Forward

The departmental filing plan is the main result: a folder map, naming rules, version labels, keeping periods and access settings for one department. Its first use is deciding which old folders move and which are closed. Secretaries, administrators and the department head use it daily. Revisit it after three months, when search complaints and stray drafts show which rules need tightening.