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COURSE BROCHURE

# Paperless Office and Cloud Collaboration Records Training Course

18 – 22 April 2027
Online

# Paperless Office and Cloud Collaboration Records Training Course

**Ref:** 699_26168 **Date:** 18 – 22 April 2027 **Location:** Online **Fees:** 1900 GBP

Paperless Office and Cloud Collaboration Records is a 1-week training course for office managers and records staff moving from paper to digital, in which each participant drafts a paper-to-digital transition plan for their office. Hybrid working has emptied filing rooms while team sites, chat channels and shared folders fill with business evidence nobody has organised. Jupiter Prime Training runs this course for offices making that switch.

## Why Paperless Office and Cloud Collaboration Records Matter Now

Three shifts drive this subject. Hybrid working means staff need reliable access to files from home, branch offices and client sites. Cloud collaboration suites let anyone create a team site or channel, so records multiply without owners or structure. Storage costs push offices to release paper cabinets. Offices that plan the move find files quickly and dispose of paper with confidence; those that rush create duplicate scans, lost originals and sprawling sites. The course draws on ISO 15489-1 for records principles and ISO 16175 for what records functions a platform should offer.

## Who Gains Most from Paperless Office and Cloud Collaboration Records

- Office managers who decide how files are stored, shared and archived
- Records staff who maintain registers, file plans and paper stores
- Administrators who set up team sites, libraries and channels
- Coordinators who manage scanning batches and quality checks
- Assistants who file correspondence for managers in hybrid teams

An office gains most when its manager, records clerk and site administrator attend together to agree structure, scanning and access.

## Paperless Office and Cloud Collaboration Records Capabilities

The outcomes cover moving paper files to scanned images and organising the team sites where new records now live.

- Assess paper holdings by volume, use and keeping period — the office manager
- Design a team site and library structure matched to office functions — site administrators
- Specify scanning, indexing and quality checks for back-file conversion — scanning coordinators
- Apply naming, version and sharing rules in collaboration spaces — hybrid teams
- Weigh which paper originals to keep, destroy or archive after scanning — records and legal advisers
- Build a paper-to-digital transition plan with phases and owners — senior management

## Key Paperless Office and Cloud Collaboration Records Terms

- Back-file conversion — scanning an existing body of paper files so that the digital images can replace or supplement the originals.
- Team site — a shared online workspace holding libraries, lists and pages for one group, with its own membership and permissions.
- Document library — a structured store inside a team site where files carry columns of descriptive metadata and version history.
- Image quality check — the inspection of scanned images for legibility, completeness and correct page order before originals are released.
- Hybrid working — an arrangement in which staff split time between office and remote locations while relying on shared digital files.
- Information architecture — the arrangement of sites, libraries, folders and metadata that decides where content is stored and how it is found.

## Paperless Office and Cloud Collaboration Records Day by Day

### Day 1: The Shift from Cabinets to Cloud

- Paper Holdings Survey — Sizing Volume, Use and Condition of Files
- Hybrid Working Access Patterns — Locating Where Staff Need Files
- ISO 15489-1 Records Principles — Setting Evidence Requirements Before Scanning
- Collaboration Platform Landscape — Choosing Between Team Sites, Channels and Drives
- Stakeholder Map for the Move — Securing Support from Managers and IT

### Day 2: Designing Team Sites and Libraries

- Information Architecture Sketch — Matching Sites to Office Functions
- Library Metadata Columns — Replacing Deep Folder Trees with Descriptors
- Naming and Version Conventions — Reducing Duplicate Files in Shared Spaces
- Permission Groups and Sharing Links — Balancing Access with Confidentiality
- ISO 16175 Records Functions — Checking What the Platform Must Provide

### Day 3: Digitising Paper Files

- Scanning Specification — Setting Resolution, Format and File Size
- Batch Preparation and Indexing — Removing Staples and Capturing Index Fields
- Image Quality Check Routine — Accepting or Rescanning Batches
- In-House or Bureau Scanning Comparison — Deciding Who Converts Back Files
- Paper Original Disposal Rules — Choosing to Keep, Destroy or Archive

### Day 4: Records in Everyday Collaboration

- Channel and Chat Retention Settings — Deciding What Conversations Become Records
- Declaring Records in Libraries — Locking Final Versions Against Edits
- Site Lifecycle Rules — Closing and Archiving Inactive Team Sites
- Search and Findability Tests — Checking Staff Locate Files Quickly
- User Guidance and Champions Network — Sustaining Habits in Hybrid Teams

## Day 5: Practising the Paper-to-Digital Transition Plan

- Holdings Survey Results — Applying Day One Findings to Phasing
- Site Structure Draft — Testing Day Two Libraries on Sample Files
- Scanning Batch Plan — Applying Day Three Specifications to Real Volumes
- Peer Review Session — Challenging Phases, Owners and Risks
- Paper-to-Digital Transition Plan — Completing Phases, Owners and Milestones

## Applying Paperless Office and Cloud Collaboration Records After the Course

- Survey one floor of paper cabinets and record volume, use and keeping period for each file series
- Build a pilot team site library with metadata columns and naming rules for one office function

## Paperless Office and Cloud Collaboration Records Questions FAQ

### What is paperless office and cloud collaboration records practice, and why does it matter now?

It is the planned move of office files from paper cabinets into scanned images and organised team sites. It matters now because hybrid working and cloud platforms have changed where staff create and look for records.

### Which roles gain most from paperless office and cloud collaboration records training?

Office managers, records staff and team site administrators gain most along with scanning coordinators.

### How does paperless office and cloud collaboration records training differ from a document control course?

It focuses on moving an office from paper to cloud workspaces, not on revision, transmittal and approval control of project documents.

### What do you bring back from paperless office and cloud collaboration records training?

You bring back a paper-to-digital transition plan covering holdings survey, site structure, scanning batches and disposal of originals. Examples come from law firms and clinics.

## Paperless Office and Cloud Collaboration Records: The Way Forward

The paper-to-digital transition plan first informs which file series to scan and which team site to build first. Office managers use it with IT administrators to schedule phases, and records staff track batches against it. After the first phase, revisit search results and site sprawl, since staff habits in hybrid teams show whether the structure works.