

Course : Useful, fast, efficient filing

Practical course - 2d - 14h00 - Ref. CLA

Price : 1610 CHF E.T.

★★★★☆ 4,6 / 5

Methods, tools and techniques for filing documents and information. Drawing up filing plans and organizing archiving and consultation procedures (paper and electronic). Workspace management. Legislation and security procedures.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Use methods, tools and techniques for filing documents and information
- ✓ Choose a classification method based on the information and its use
- ✓ Organize and maintain your filing system, whether in paper or electronic form
- ✓ Implement filing and archiving procedures

Intended audience

Anyone who needs to organize the filing of their own files and manage documentation. Administrative assistants or departments.

Prerequisites

No special knowledge required.

Practical details

Hands-on work

Alternating theoretical and practical inputs: based on the experience of each participant, analysis and improvement of their efficiency

Course schedule

PARTICIPANTS

Anyone who needs to organize the filing of their own files and manage documentation. Administrative assistants or departments.

PREREQUISITES

No special knowledge required.

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

1 Define and understand grading characteristics

- Using the file: information, action...
- Characteristics of a file: who, when, what form
- The key role of filing in information gathering and processing.
- Different filing tools and methods.

Hands-on work

Partage d'expériences : difficultés rencontrées dans les tâches de classement des documents. Analyses des critères et des outils.

2 Organize and "bring to life" your filing system

- Establish a common logic.
- Identify the main effects of poor personal organization.
- Streamline your workspace.
- Reduce sources of stress linked to time and organization.

Hands-on work

Classification organization.

3 Analyze information and choose a classification method

- Analyze the information to be processed in your department.
- Identify assets and constraints.
- Apply the four principles of classification.
- Know the different tools for a global view: To-do-list, concept map.
- Match the filing system to the characteristics of the company and its users.

Hands-on work

Filing tools and methods.

4 Organizing computer filing

- Choose a clear tree structure for everyone.
- Be rigorous when choosing file names.
- Use messaging storage tips.

Hands-on work

Tree exercise.

5 Facilitating access to information for all

- Define how to reorganize a department's existing filing system.
- Draw up a filing plan.
- Match paper and computer filing.
- Set up a filing system that everyone can understand: sorting and restructuring files.

Hands-on work

Self-assessment of the strengths and weaknesses of the current system

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

6 Implement filing and archiving procedures

- Identify the borrower and the purpose of the card.
- Determining an outplacement procedure: who, where, how?
- Define document management procedures. Security procedures.
- Control and define file access procedures.
- Know the legal retention period for documents.
- Discover EDM.

Hands-on work

Personal action plan: formalize the actions to be taken to develop your own filing plan.

Dates and locations

REMOTE CLASS

2026 : 15 June, 28 Sep., 19 Nov.