

Classify useful, fast, effective



EP-68 2 Days (14 Hours)

Description

Methods, tools and techniques for classifying documents and information. Development of classification plans and organization of archiving and consultation procedures (paper and electronic). Workspace management. Legislative point and safety procedures.

Who is this training for ?

For whom

Any person responsible for organizing the classification of their own files and the management of documentation. Administrative assistant or service.

Prerequisites

No special knowledge.

Training objectives

- Use methods, tools and techniques for classifying documents and information.
- Choose a classification method based on the information and its use
- Organize and sustain your classification whether in paper or computer version
- Implement filing and archiving procedures

Training program

Définir et comprendre les caractéristiques d'un classement

- A file for what? Information, action.
- A file for whom, for when? in what form? Determine the key role of classification in collection and processing information.
- The different classification tools and methods.
- Practical work Sharing experiences: difficulties encountered in document classification tasks.
- Analysis of criteria and tools.

Organiser et "faire vivre" son classement

- Establish a common logic.
- The main effects of poor personal organization.
- Rationalize your work space.
- Reduce the sources of stress linked to time and organization.
- Practical work Case of classification organization.

Analyser l'information et choisir une méthode de classement

- Analyze the information to be processed in your department.
- Identify the assets and constraints.
- Implement the four principles of classification.
- Know the different tools for a global view: To-do-list, conceptual map.
- Match the classification system and the characteristics of the company and users.
- Practical work Classification tools and methods.

Organiser le classement sur ordinateur

- Choose a clear tree structure for everyone.
- Be rigorous in the choice of file names.
- Use tidying tips in messaging.
- Practical work Exercise: tree structures.

Faciliter l'accès de tous à l'information

- The process for reorganizing the existing classification of a service.
- Develop a classification plan.
- Match the paper and computer classification.
- Set up a classification that everyone can understand: sorting and restructuring files.
- Practical work Self-diagnosis of the strengths and weaknesses of the system currently in place

La procédure de classement et l'archivage

- Who borrows? Usefulness of the form.
- Who reclassifies? Where? How? Document management.
- Security procedure.
- Control of access to files.
- Legal retention period of documents.
- Discover the GED.
- Practical work Action plan personnel: formalization of the actions to be implemented to develop your classification plan.