

## Electronic 5S: Organizing Electronic Workspaces

**Increase efficiency by giving employees skills they need to effectively manage electronic files.**

### **Organizing your Electronic Workspace**

Many employees accustomed to paper filing systems do not have the organizational skills to effectively manage their electronically stored information. Decreasing time spent searching for files improves efficiency and reduces employee frustration.

### **4 Hour Class - Expected Outcomes for Participants**

- Understand how to create folders, sort, organize and use quick access tools for improved efficiency
- Learn how to develop folder hierarchies, naming conventions and document headers/footers
- Practice applying organizing tools and techniques to manage electronic files

### **8 Hour Class – Additional Expected Outcomes for Participants**

- Create folder hierarchies and sort files into the new structure
- Clean out unneeded and outdated documents
- Apply naming conventions to department folders and files

*“When I started here at the company, I was lost on how to find certain items in the computer and at my desk. My papers were in files and duplicates in other files. After the Electronic 5S class, I spent a few hours going through everything and getting organized. I converted a lot of documents to PDFs on our shared drive so that everyone can see them without making 30 copies. I have incorporated the 5S system into my daily routines here at work and even at home. This training made a world of difference in improving my productivity and reducing stress.”*

**–Dave Hunt**  
**Hardware Purchasing Agent, Walsh Door & Hardware Co.**





## Electronic 5S: Organizing Electronic Workspaces

### Training Agenda (4 hours)

#### **Outlook® Email**

- Review of email viewing & sorting options
- Set preferences, distribution lists & task lists
- Review how and where to save emails to calendars & network folders
- Review how to effectively utilize the Outlook calendar

#### **Network Drives**

- Review folder views & sorting
- Learn how to use quick access tools for files & folders
- Discuss document storage options

#### **File & Folder Management**

- Discuss folder hierarchy structure
- Discuss the importance of naming conventions
- Tips for using abbreviations, editing & other quick tips
- Review how to use footers & quick parts
- Discuss retention standards & best practices

### Additional Training Agenda Items (8 hour options)

- Create folder hierarchies for department files
- Sort department documents into new folder structure
- Create and apply naming conventions
- Begin creating retention standards & procedures

### Length of Class

4 & 8 hour options

### Class Size

6 – 25 participants. Must have computer access for each participant.

### Client Responsibilities

- Identify computer/shared drives to be organized
- Select and notify participants
- Work with trainer to determine appropriate length of training
- Set training date(s), and secure computer lab and drive accesses for training
- Prepare training introduction (purpose, expectations)

### Trainer Responsibilities

- Work with leadership to identify:
  - Desired outcomes & baseline metrics
  - Number of participants
  - Training date(s) & other logistics
- Supply presentation & participant materials
- Conduct session