

## Pathways to a Paperless Environment

### Preparing to Transition to a Paperless Environment

#### Making Paperless Palatable

A paperless environment means greater efficiency and less physical clutter. However, the process of going paperless can be intimidating for employees and employers alike. This dynamic series of workshops will help your organization prepare to transition from a paper-based to an electronic system. These dynamic workshops can be taken either individually or as a series. Each workshop is 3 hours long, with 10-24 participants. Anticipated training outcomes are described on the reverse.

#### Workshops

- Time Management
- Navigating in an Electronic Environment & Managing Outlook
- Organizing Electronic Files + SharePoint Introduction
- Setting up Your Team Site in SharePoint

*“When I started here at Walsh Door & Hardware Co., 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. I have now 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 electronic 5S system in particular 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.**



## Pathways to a Paperless Environment

### Pathways to Paperless Environment Workshops

#### 1. Time Management

It's different in a digital world!

Learn:

- Covey's 4 quadrants of time management
- Common time wasters
- How personality impacts your work
- Keys to organizing your physical workspace
- Outlook<sup>®</sup> tips to help manage your work time

#### 2. Navigating in an Electronic Environment & Managing Outlook<sup>®</sup>

Make your PC work for you: tips and tricks including managing emails and calendars using Outlook<sup>®</sup> tools.

Learn:

- File storage options and the benefits of each
- Computer tips and functions for organizing files to minimize searching
- Working with Outlook<sup>®</sup> Calendars and email management

#### 3. Organizing Electronic Files + SharePoint Introduction

Take the next step toward creating an efficient electronic document management structure.

Learn:

- Best practices for creating folder hierarchies
- File naming conventions
- Document retention standards
- Benefits of converting your files to a document management software platform (SharePoint).  
*Participants must bring their own work files to practice with, either on a computer, flash drive or have remote access to files.*

#### 4. Setting up Your Team Site in SharePoint

If your organization has SharePoint and you are ready to start utilizing it to manage your documents and processes, this is the class for you.

Learn how to:

- Set up libraries and lists
- Create permissions, workflows, calendars and contacts
- Produce reports
- Manage web parts