Office Information Systems Training Course: Workflow, Access Rights, Retrieval and Adoption

20 – 24 September 2027
Cape town

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Ref: 628_31842 **Date:** 20 – 24 September 2027 **Location:** Cape town **Fees:** 4800 GBP

Programme Summary

Office information systems are the subject of this one-week training course for heads of administration and corporate services managers, ending in a systems plan for one function or site. Offices run on document stores, shared workspaces, approval flows and search tools that grow without design, so people hold several versions, wait for approvals and cannot find what they need. The programme moves from an inventory of information to requirements, workflow, access rights, retrieval and user adoption, applied to a function the participant selects. Mars Training Centre UK delivers this programme on office information systems to mixed-organisation cohorts.

The Business Case

Everyday information systems shape how fast an office works and how safely it holds sensitive material. When tools are chosen one team at a time, staff keep copies in personal folders, approvals stall in inboxes and access is granted by habit rather than by role. Leaders who specify requirements, map flows and set clear rules for access and retrieval give teams one dependable way of working.

- Search Time: Falls as naming and version rules and retrieval routes are agreed and applied.
- Approval Cycle Time: Falls as workflow maps remove duplicated steps and waiting points.
- Access Exposure: Falls as access rights follow roles and are reviewed on a set cycle.

Principles and Evidence Base

- Information Inventory: A structured list of what the office holds, where it sits and who uses it, built in Session 1.
- System Requirements Specification: A written statement of what a system must do, used in Session 2 to compare options.
- Workflow Map: A diagram of each step, owner and hand-off in a process, drawn and simplified in Session 3.
- Access Rights Matrix: A grid linking roles to what each may see, change or share, built in Session 4.

Intended Participants

- Heads of administration who own the tools staff use to create, share and find information.
- Corporate services managers who sponsor system selection and rollout.
- Office managers who set filing, naming and version habits across teams.
- Senior coordinators who run approval flows and shared workspaces.
- Managers who brief technology teams on office needs.

Typical sectors include banking, healthcare, energy and public bodies.

Learning Outcomes

1. Participants will be able to construct an information inventory for one function or site.
2. Participants will be able to prioritise system requirements and compare options against them.
3. Participants will be able to diagnose delays and duplication in an approval workflow.
4. Participants will be able to design an access rights matrix that follows roles.
5. Participants will be able to evaluate naming, version and retrieval rules for ease of use.
6. Participants will be able to justify an adoption plan that brings users onto the agreed way of working.

Programme Structure

Day 1: Office Information Systems and the Information Inventory

What information does the office hold, where does it sit and who relies on it?

- Information Inventory Template
- Shared Workspace Audit
- Document Store Mapping
- User Pain Point Interviews
- Information Priority Ranking

Day 2: Requirements and System Selection

What must a system do, and how are the options compared?

- System Requirements Specification
- Requirement Priority Scoring
- Option Comparison Grid
- Supplier Demonstration Checklist
- Configuration Decision Log

Day 3: Workflow and Approvals

How do approvals move, and where do they stall or repeat?

- Workflow Map Drawing
- Hand-Off and Waiting Point Analysis
- Approval Route Simplification
- Delegation and Cover Rules
- Notification Rule Design

Day 4: Access Rights, Retrieval and Version Control

Who may see, change and share what, and how is it found again?

- Access Rights Matrix
- Role and Permission Review Cycle
- Naming and Version Rules
- Search and Tagging Scheme
- Leaver and Mover Access Check

Day 5: Adoption and the Systems Plan

Do the inventory, requirements, workflow and access rules hold together for one function?

- Applying the Session 1 Information Inventory Template
- Testing the Session 2 Option Comparison Grid
- Checking the Session 3 Approval Route Simplification
- Reviewing the Session 4 Access Rights Matrix
- Completing the Office Systems Plan

Methodology

The programme uses a structured exercise method built on a shared case of a mid-sized office with scattered files, slow approvals and mixed access habits. Participants apply each tool to the case and then to their own function, and receive written facilitator feedback on every artefact.

- Suggested activity: Auditing a shared workspace and listing duplicated and outdated files.
- Suggested activity: Scoring three system options against a ranked requirements list.
- Suggested activity: Redrawing an expense approval flow to remove two waiting points.

Capstone Output

Each participant completes an office systems plan for one function or site. It holds an information inventory, a ranked requirements specification, a simplified workflow map, an access rights matrix, naming and version rules and an adoption plan. The plan is used at work to brief sponsors and instruct suppliers.

Frequently Asked Questions

Is office information systems training suitable for managers without a technology background?

Yes. Office information systems are taught through cases and templates, so the programme assumes experience of running an office or corporate function but no technical or programming skills.

Which tools does office information systems training draw on?

Office information systems training draws on the information inventory, system requirements specification, workflow map and access rights matrix, each built and tested across the one week.

How is the plan from office information systems training used at work?

You use the office systems plan to brief sponsors, instruct suppliers and technology teams, and guide the first steps of a rollout for one function or site.

How do office information systems differ from records governance training?

Office information systems centre on the tools, flows and access used every day, while records governance training centres on retention, legal hold and preservation of records.