

# ARCHIVE AND RECORD MANAGEMENT WORKSHOP – 3 DAYS

Skills Category: Administration Skills

Unit Standard: 259437

NQF Level 4

Credits: 10



**Training & Consulting**

*Unlocking your hidden Potential*

## Target Audience

Minimum 8 Delegates

- ❖ Record Managers
- ❖ Chief Archivists
- ❖ Office Managers
- ❖ Information Managers
- ❖ Librarian
- ❖ Data Protection Managers
- ❖ Compliance Managers
- ❖ Records Management Officers
- ❖ Company Secretaries
- ❖ Administrators
- ❖ Database Managers
- ❖ Registry Clerks
- ❖ Training Officials
- ❖ Registry Supervisors
- ❖ information Governance Professionals
- ❖ Departmental Managers Responsible for Records Management
- ❖ IT Staff responsible for records management
- ❖ Representatives from National and Provincial Archives

## Course Aim

This workshop will equip those with Records management responsibilities to further their careers by being able to converse at a strategic level regarding current important topics in Records and information management. The course is deliberately held at a high level, and requires active participation from all delegates. In addition to the course content, delegates will benefit by interacting with other thought leaders in the information management field.

## Course Objectives

- ❖ Understand the implications of new legislation on Records management and guide the organization to becoming compliant
- ❖ Create a strategic plan for a Records improvement process
- ❖ Align the Records management programme to the Corporate goals and objectives
- ❖ Provide input into the Enterprise Content Management initiatives of the organization.
- ❖ Prepare the organization for Information Governance, beyond IT Governance
- ❖ Assist the organization in balancing the needs for Privacy versus Accessibility of Records
- ❖ Lead the process for managing social media as Records where appropriate.
- ❖ Make informed decisions as to whether the "Cloud" is a suitable repository for
- ❖ organizational Records
- ❖ Look beyond traditional "File Plan" thinking and start developing value-based Records classification schemes
- ❖ Inform the organization of the pros and cons of SharePoint as a Records management system.

# Course Outline

## ***Lesson 1: Current legislative impacts on Records management***

- The Protection of Personal Information Bill
- King III and the implications for Records management
- The New Companies Act

## ***Lesson 2: Strategic Planning and Management for Records and Archive Services***

- Identify the Corporate Drivers facing the organization
- Determine the key management issues facing document and Records management
- Conducting an audit/maturity assessment
- Creating a roadmap based on the audit findings
- Implement a Records Management programme
- Create a change and communications management plan

## ***Lesson 3: Beyond basic Electronic Records – critical issues to consider***

- Long-term preservation
- Metadata
- File naming
- File formats
- Storage facilities and procedures
- Digital media
- Evaluation of Records management systems
- Digital imaging
- E-mail management
- Web content management
- Electronic and advanced electronic signatures
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## ***Lesson 4: Information Governance (Beyond Records management, Risk and Security)***

Information Governance and Generally Accepted Recordkeeping Principles (GARP)

- Records management in relation to other enterprise initiatives
- Conversion of paper documents and Records to electronic files

- Records Management
- Content / Knowledge Management
- Collaboration / Work-flow engines
- Version control
- Electronic forms management

## ***Lesson 5: Transparency and Records Management***

- Transparency implications for Records and information management
- Records Management as a tool for establishing transparency and accountability
- Records Management maturity levels

## ***Lesson 6: Managing Social Media Records***

- Introduction
- Understanding Social Media
- Social Media as a record.
- Retention of Social Media communications
- Social media as a Records management tool
- Managing Social media Records using GARP principles

## ***Lesson 7: Managing Documents & Records in the Cloud***

- Understanding “The Cloud”
- Different “Cloud” and deployment models
- Advantages and disadvantages of cloud storage
- Discussing the implications for Records management
- Determining whether the cloud is right for your organizations Records
- Key action steps

## ***Lesson 8: Business Classification Schemes***

- What is a business classification scheme
- Integrating paper, electronic and e-mail classification schemes

- Extended file plan and metadata models
- Naming Conventions

### ***Lesson 9: SharePoint 2010 E-Records Management***

- Reviewing the capabilities and features of SharePoint 2010 Records Centre
- Configuration options
- Planning considerations
- Managing physical Records with SharePoint

## ***Course Delivery***

<b>Starting time</b>	: 08h30
<b>Mid-morning break</b>	: 10h00 – 10h15
<b>Lunch</b>	: 12h00 pm – 12h45
<b>Mid-afternoon break</b>	: 14h30– 14h45
<b>Knock off</b>	: 16h00

### ***Delivery Method:***

The programme is facilitated by a competent subject matter specialist/s, which utilises the following techniques to ensure that the session is practical and experiential: Discussion; Role Plays; Exercises & Case Studies; Simulation; and learner assessment.

### ***Assessment and Certification***

#### ***Formal Assessment:***

Each learner will be provided with an assessment guide on the last day of the programme in which a range of assessment methods and tools will be used to assess the competence level of each individual learner.

#### ***Feedback:***

Learners will receive comprehensive, detailed and accurate feedback on assessment.

#### ***Certification:***

When the learner is found to be competent in the specific field of knowledge a certificate will be issued.

#### ***Language of delivery:***

English



**PLEASE EMAIL COMPLETED REGISTRATION FORM BACK TO:**

**Email: [info@prospectplus.co.za](mailto:info@prospectplus.co.za)**

**TEL: 072 944 5909**

# ARCHIVE AND RECORD MANAGEMENT WORKSHOP

3 Days

In-house or Open course



### COMPANY DETAIL

Company Name: .....Country.....Cell.....

Postal Address.....Postal Code.....

Tel Number.....Fax Number.....

Nature of Business.....

### NOMINEES

1. Name:.....Surname:.....Position.....
2. Name:.....Surname:.....Position.....
3. Name:.....Surname:.....Position.....
4. Name:.....Surname:.....Position.....

**(For more Delegates Please Photocopy)**

### ORGANISATION APPROVAL

Approving Manager Name: \_\_\_\_\_

Title: \_\_\_\_\_ Organization: \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Signature : \_\_\_\_\_ ( This booking is invalid without a signature)

**DELEGATE FEE: R10 500.00 – Fees includes course documentation, Facilitation, assessments & Certificates on completion of Course. An additional cost of R2 000 for laptop hire**

### PAYMENT METHODS

Bank Transfer payments to be made payable to: **Prospect Plus (Pty) Ltd, NedBank, Account Number: 1171790759, Branch Code: 19130500**

please Email this form and proof of Payment to [andries@prospectplus.co.za](mailto:andries@prospectplus.co.za)

### TERMS AND CONDITIONS

**CANCELLATIONS:** By completing this registration form, the client hereby agrees that Prospect Plus will not be able to mitigate its losses for any less than 50% of the total contract value. Cancellations must be received in writing seven days prior to the event. Only cancellation made in writing and addressed for the attention of the Chief Financial Officer will be recognized by Prospect Plus. Cash alternatives will not be offered although delegate substitutions are welcome any time. Hereafter, the full workshop fee is payable.

If for any reason Prospect Plus decide to amend this workshop, we are not responsible for covering airfare, hotel or other costs incurred by registrants. In the event that I Prospect Plus cancel the event, Prospect Plus reserves the right to transfer this booking to another workshop to be held in the following six months, or to provide a credit of an equivalent amount to another workshop in the same sector within the following six months.

**INDEMNITY:** Should for any reason outside the control of Prospect Plus, the venue or speakers change, or the event be cancelled due to act of terrorism, extreme weather conditions, industrial action Prospect Plus shall Endeavor to reschedule but the client hereby indemnifies and Prospect Plus holds harmless from any costs, damages, and expenses including attorney fees, which are incurred by the client. The construction validity and performance of this Agreement shall be governed in all aspects by the laws of Republic of South Africa to the exclusive jurisdiction of whose course the parties hereby agree to submit.

**PAYMENTS ARE REQUIRED WITHIN 7 DAYS OF INVOICE.**