



COR Concepts
Information Management
Consulting

Duration: 3 days
Course ID: ERM003

Introduction

The Advanced Records Management Training course is designed to stretch the thinking of those who have been in the records management industry for some time. We discuss advanced concepts in a workshop environment and test traditional thinking. This programme is not suited for new records managers or those just starting out in the industry. Delegates from the private and public sector will benefit from this programme. Staff members responsible for Information Governance in their organisations will benefit and be able to take back some of the concepts to expand on traditional records and archives thinking.

ADVANCED ELECTRONIC DOCUMENT & RECORDS MANAGEMENT SYSTEMS TRAINING

Facilitators:

COR Concepts facilitators are all specialists in the field of Document, Records and Information Management. They all have extensive experience in the field of Document & Records Management and draw on best practice as developed by organizations such as ISO, AIRM and ARMA to ensure that course content is up to date and as practical as possible.

Outcomes:

After completing the course, delegates will be able to:

- Understand the implications of new legislation on records management and guide the organisation 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 organisation.
- Prepare the organisation for Information Governance, beyond IT Governance
- Assist the organisation 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 organisational records.
- Look beyond traditional "File Plan" thinking and start developing value-based records classification schemes.
- Inform the organisation of the pros and cons of SharePoint as a records management system.

Objectives:

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.

Who Should Attend:

- Records Managers
- Information Governance professionals
- Departmental managers responsible for Records Management
- IT staff responsible for records management
- Representatives from National and Provincial Archives
- Representatives from watchdog organisations responsible for Industry Governance.



COURSE OUTLINE



Course Outline:

Current legislative impacts on records management:

- The Protection of Personal Information Act (POPIA)
- King IV and the implications for records management
- The New Companies Act

Strategic Planning and Management for Records and Archive Services

- Identify the Corporate Drivers facing the organisation.
- 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.

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

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

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

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

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 organisation’s records
- Key action steps

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

SharePoint and Office 365 E-Records Management

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



REGISTRATION INFORMATION



Company Name:				VAT No.:	
Postal Address:					
Telephone No.:				Fax No.:	
E-mail Address:				Purchase Order No.:	
No.	Title	Delegate Name	Designation	E-mail	Cell No.
1.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
2.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
3.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
4.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
5.					
☐ Yes, please update me with relevant information					

COR Concepts Cancellation and Postponement Policy

In the event that COR Concepts cancels an event, delegate payments will be refunded. In the event that COR Concepts postpones an event, delegate payments at the postponement date will be credited towards the rescheduled date. If the delegate is unable to attend the rescheduled event, the delegate will receive a 100% credit representing payments made towards a future event. This credit will be available for up to one (1) year from the date of issuance. No refunds will be available for postponements. COR Concepts is not responsible for any loss or damage as a result of a substitution, alteration or postponement of an event. COR Concepts shall assume no liability whatsoever in the event this training course is rescheduled or postponed due to fortuitous event, Act of God, unforeseen occurrence or any other event that renders performance of this training course impracticable or impossible. For purposes of this clause, a fortuitous event shall include, but not be limited to: war, fire, labour strike, extreme weather or other emergency.

TERMS AND CONDITIONS

Delegate Cancellations

All delegate cancellations must be received in writing and are subject to the following conditions:

- For any cancellations received 20 working days before the start of the training course, COR Concepts will issue 100% credit for the value paid to be used for up to one year from the date of issue for any further COR Concepts training course;
- For any cancellation received less than 20 working days before the date of the training course, the full fee will be payable and no refunds or credit notes will be given;
- If a registered delegate does not cancel and fails to attend the training course, this will be treated as a cancellation and no refund or credit note will be issued;
- Delegate substitutions are welcome. Please notify us 5 days before the event.

Payment Method : Direct Deposit

An invoice will be generated once the registration form is received.

Confirmation

Your registration will only be confirmed once payment is received and may be subject to cancellation.

Right of Admission

COR Concepts reserves the right to refuse admission to the training course where evidence of full payment cannot be shown.

Delegate Substitutions

Delegate substitutions are welcomed at any time and do not incur any additional charges. Please notify us in writing of any such changes.

Application for Registration & Acceptance of Terms & Conditions

I acknowledge that I have read and understood all of the Payment Methods, Policies and Terms and Conditions (including payment terms) and hereby apply for registration on behalf of myself (if a single delegate) or on behalf of the under mentioned organization which I am duly authorised to represent.

Name: _____

Organization : _____

Job Title: _____

E-mail: _____

Signature : _____ Date : _____



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