

Advanced Document And Records Management



Course Summary

This course is intended for people who have an understanding of the basics of document and records management and who wish to gain a deeper understanding of some of the techniques and steps involved in designing, implementing and running a document and records management solution.

This course provides delegates with a more detailed understanding and experience of the major deliverables when implementing a DRM solution. It uses a case study to take you through the typical stages of identifying, implementing and operating a document and records management solution. Exercises throughout the course will get you to produce actual document and records management deliverables.

On This Course, You Will:

- 1. Understand** the lifecycle of documents and records and be able to design an effective document and records management solution
- 2. Develop** actual deliverables that are required throughout a document and records management project
- 3. Learn** how the various project deliverables interact to provide an overall solution
- 4. Gain** confidence to address your own organisation's document and records management needs with specific techniques



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Day One

Principles

Elements Of Information Management

Objective – To introduce definitions and terminology. Place information management in the context of an organisation and the other initiatives and issues. This session will discuss:

- Why keep information?
- The importance of information
- The different aspects of information management
- The information lifecycle and the value of information overtime

Challenges Of Managing Information

Objective – To understand the challenges of management information so that they can be addressed. The session will discuss:

- Advantages and problems with paper and digital information
- Locations, formats, systems, processes and people
- The growth of information

Business Drivers For Managing Information

Objective – To introduce why organisations need document and records management. Drivers are dealt with in three categories:

- Compliance
- Governance
- Efficiency

Documents And Records

Objective – To understand the differences between document and records management in order to identify business requirements. The session will discuss:

- The distinction between document and records management
- Features of records management

Principles Of Record Keeping

Objective – To introduce the concept of recordkeeping principles. The session will discuss the Generally Accepted Recordkeeping Principles (GARP).

Day Two

Designing And Implementing A Record Keeping System (DIRKS)

Introduction To DIRKS – Eight Steps

Objective – To introduce a rigorous method to designing and implementing a recordkeeping system. The session will discuss the eight steps to DIRKS:

- Conduct preliminary investigations
- Analyse business activities
- Identify recordkeeping requirements
- Assess existing systems
- Identify recordkeeping strategies
- Design recordkeeping systems
- Implement recordkeeping systems
- Conduct implementation reviews

Classification Scheme

Objective – To learn how to design a usable file plan based on a sound classification scheme. The session will discuss:

- Types of classification
- Reasons for a classification scheme
- Examples of classification schemes
- Hierarchical
- Case management structures
- Examples of sector standards
- Standards and guidelines for developing a classification scheme
- Distinction between classification scheme and file plan
- How to develop a classification scheme and file plan

Information Surveys

Objective – Address how to undertake information surveys.

The session will discuss:

- Determining the purpose of the survey
- Using tools to conduct the survey
- Identifying the questions to ask
- Undertaking physical inspection

Day Three

Records Management

Document Retention And Disposition

Objective – To learn how to design and implement retention and disposal. The session will discuss:

- Retention and disposal policies
- Retention and disposal guidelines
- The role of classification
- Practical approach to implementing retention and disposal Policies

Information Security

Objective – To introduce the concepts of good information security. The session will discuss:

- Information security management systems
- Information security policy
- Security controls
- Risk management

Change Management

Objective – To learn how to address the challenges of getting users to change in order to support the introduction of new practices and solutions. The session will discuss:

- Cultural impact of Electronic Document And Records Management System (EDRMS)
- The change process
- Training requirements
- Promoting systems and good practice to users
- Developing a change management strategy

Day Four & Five

Electronic Records Management (ERM)

ERM Requirements

Objective: To examine the different standards for recordkeeping and electronic records management requirements. The session will discuss:

- MoReq2010
- DOD 5015
- ICA (ISO 16175)
- ISO 15489
- ISO 30300 series

Email Management

Objective: To review the challenges in managing email and identify different approaches. The session will discuss:

- The distinction between email archiving and email management
- Specific issues with managing email
- Potential solutions for email management

Digital Preservation

Objective – To understand the issues involved in maintaining usable document and records over time, whatever the media. The session will discuss:

- Digital issues
- Physical issues
- Approaches to preservation

Emerging Challenges

Objective – To discuss the challenges that new technologies are placing upon DRM and identify how to address these.

- Big data
- Bring Your Own Device (BYOD)
- Cloud Computing
- Mobile devices
- Social media

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Job Title	Email (required)	Telephone

3rd Delegate Details:

Title	Surname	First Name
Job Title	Email (required)	Telephone

AUTHORIZATION

I wish to register the delegate(s) indicated above

Title	Surname	First Name
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