



COR Concepts
Information Management
Consulting

Duration: 5 days
Course ID: RM002

Introduction

The Records Management training for the Sector course is based largely on international standards and methodologies for implementing Records Management. This programme is ideal for Records Managers in the Private sector who need a comprehensive approach and guidance to planning, setting up and managing records within the organisation. Delegates will receive a number of templates and frameworks to kick start their records management improvement. This programme is a must for any staff member who has been appointed to the position of records, or who has been allocated those responsibilities.

RECORDS MANAGEMENT FOR THE PRIVATE SECTOR 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.

Who Should Attend:

- Records Managers.
- Senior Registry Officials.
- Departmental managers responsible for Records Management.
- Departmental/unit records coordinators.
- IT staff responsible for records management.

Objectives:

Delegates will be able to:

- Understand the legal environment that surrounds records management and their responsibilities in terms of the law.
- Make informed decisions relating to electronic records and advise their organisations accordingly.
- Conduct a records audit as a basis for developing a records management strategy.
- Create and implement a records management roadmap and programme.
- Use the DIRKS records management methodology in accordance with ISO 15489.
- Understand the various standards applicable to records management.
- Manage records on all formats.
- Conduct an analysis of processes which impact on records management.
- Develop a Business Classification Scheme or File Plan.
- Implement a retention schedule.
- Implement a systematic disposal programme to destroy or transfer records which no longer have value.

- Understand the risks associated with various types of records media and protect against these risks.
- Understand Vital records, and implement a vital records plan.
- Develop a change and communications plan.
- Implement an ongoing audit and assessment programme.

Outcomes:

This programme closely follows the Requirements for Records Managers in the Public Sector as set out by the National Archives and Records Service (NARS) and is ideal for Records Managers in the Public Sector who have not been through the National Archives training. It covers all the content required by NARS for compliance to their Directives. This programme is a must for any staff member who has been appointed to the position of records manager, or who has been allocated those responsibilities.

Outline:

PART 1: Statutory & Regulatory Framework

- Statutory and regulatory framework applicable to records management in the Private Sector Records Management standards Implications for Electronic records.

PART 2: Setting up a Records Management Programme

- Creating a Records Management strategy.
- Conducting a records assessment/audit using Generally Accepted Recordkeeping Principles (GARP)
- Implementing according to the standards (ISO 30300, 30301, 15489).
- The DIRKS Methodology (Developing and Implementing a Record Keeping System).
- Functions and responsibilities of a Records Manager.

COURSE OUTLINE



PART 3: Management of Private Sector Records

- Understanding Documents v Records and the interrelationships between them
- Managing electronic records
- Metadata and naming conventions
- Managing micrographic records
- Managing audio-visual records
- Managing security classified records in all formats
- Digital preservation
- Vital records



PART 4: Records Classification Systems

- Designing, implementing and maintaining a records classification system.
- Records Inventories and audits.
- Creating Functional subject filing systems.
- Designing and implementing a new file plan.
- Implementing and maintaining a file plan or classification scheme.



PART 5: Disposal of Records

- Understanding the records lifecycle.
- Creating retention schedules.
- Creating a Systematic disposal programme.
- Gaining control.
- Current records.
- Terminated records.

- Applying for approval to destroy.
- Current records.
- Terminated records.
- Disposal of records:
 - Destruction of records
 - Transfer of Records
- Transfer to an archive.

PART 6: Caring for Records

- Paper-based records
- Cartographic records
- Audio-visual records
- Electronic Records
- Caring for magnetic media
 - General
 - Magnetic tapes
 - Diskettes
 - Caring for optical media
 - Micrographic records
 - Audio-visual records

PART 7: Communications & Change Management

- How to create a communications plan.
- Rolling out the plan.

PART 8: Compliance Monitoring

- On-going audits
- Maturity assessments

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Complete the registration form and e-mail to gerry@corconcepts.co.za

REGISTRATION INFORMATION



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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					
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No.	Title	Delegate Name	Designation	E-mail	Cell No.
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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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