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INNOVATIVE KNOWLEDGE WORX
Be Phenomenal

Advanced Electronic Documents and Records Management

Date: 14th - 16th March 2018

Venue: Premier Hotel OR Tambo

Johannesburg

Option: Get a tablet with additional cost.

Accredited Course by SBS (Southern Business School) NQF Level 5

For more details contact us at info@ikworx.co.za

training@ikworx.co.za   011 464 5065   086 403 7914   www.ikworx.co.za

Unit 114, Block 5, Riversands Incubation Hub, 8 Incubation Drive, Riverside View
Fourways, 2191

Target audience

This training workshop is for those who are responsible for managing documents and records, like, Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, Information officers & staff as well as solution providers, sales consultants, project managers, Administrative assistants (Admin. officers), PA's and Administrative Secretaries, IT Administrators and technical staff, Compliance Officers, as well as for admin and HR personnel. Those wishing to learn more about how to plan, implement and operate a document and records management solution. Anyone wishing to increase their level of understanding and expertise in document and records management will surely also benefit from this course.

Overview

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 an elecronic document and records management solution. One of the business challenges at present is the lack of knowledge regarding the implementation of Electronic Records Management System. The training will further seek to answer frequently asked questions such as: should records be stored on paper, in a microform or in an electronic format? How is a Records Inventory conducted? What are the steps in the development of an Organizations Records Retention Schedule? How are records archived? Therefore, participants will be assisted in making those decisions, based upon certain characteristics of the records.

The Advanced Electronic Document and Record Management Centres training is designed to deliver advanced concepts in electronic document and records management. Case studies will be explored regarding challenges around governance and sustainability issues.

It will give participants both a theoretical and practical understanding of the key concepts of Electronic Document and Records Management, and an Overview of Records Management terminology, concepts and procedures to successfully manage Records in today's offices. The course also outlines the compliance and regulatory requirements of the creation, management, and disposal of records.

Content

- Establishing A Records Management Program – Policies & Procedures
- Review of EDRMS components, functionality and possible integration of Document and Records Management Systems
- Popular records management technologies used
- Enterprise Content Management (ECM) systems and other systems containing records
- Managing the ecosystem between Knowledge, Information management and IT
- Developing a strategy for EDRMS and solution design
- Detailed policy and procedure development
- Detailed communications management workshop
- Data capture and document capture

- Metadata development and use
- Information Security
- Electronic Discovery
- Analysing work processes that capture or manage records
- Access systems, including metadata standards, processes, and products, end user interface design, productivity tools, usability assessment, revision history
- Infrastructure, including underlying repository system design, including software architecture, database design, etc.

Objectives

The course will achieve the following objectives:

- Position ECM, EDRM and Knowledge Management in a cohesive framework
- Provide a framework for developing a business case for implementing EDRMS or ECM systems
- Provide generic (non-vendor-specific) EDRMS solution design methodologies
- Provide detailed policy and procedures frameworks
- Equip delegates to be able to create their own communications plan for the EDRMS/ECM implementation
- Equip delegates to implement a trustworthy Imaging system
- Show the differences and interrelationships between data and documents or records
- Enable delegates to build metadata schema for their organisations
- Equip delegates to understand and prepare for managing e-mail as a record
- Establish an e-discovery framework
- Conduct an analysis of work processes that generate or capture records
- Establish a plan for digital preservation
- Establish the necessary Governance structures.
- To create awareness of the importance managing document
- Promote adoption of proven processes, tools and techniques to better control risks of delays, disputes and reworks
- Ensure that delegates have an understanding of the basic document management concepts and responsibilities involved in ensuring effective utilization.
- To develop skills in the management and regulation of document centres
- To elevate the importance of compliance to SA laws
- To enhance delegate skills in information evaluation, identification and analysis of information flows and resources
- To equip delegates to participate in the process of document creation, retention and destruction

Outcomes

- Understand and Implement advanced principles of Electronic Document and Records Management
- Be equipped with the tools to implement new systems or streamline existing systems

- Understand potential for introducing new technologies in Document and Records Management
- Facilitate the move to Enterprise Content Management
- To ensure that your organization is Compliant with POPI, PAIA, Copyright Act, Regulations concerning handling of sensitive information from legislation, organisation policies and professional codes of conduct
- Penalties and implications for non-compliance
- Understand and Implement advanced principles of Electronic Document and Records Management
- Be equipped with the tools to implement new systems or streamline existing systems
- Understand potential for introducing new technologies in Document and Records Management
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Course delivery

Typical methods of instruction may include:

- Instructor will lecture about Course Content topics.

- Delegates will be required to complete an assignment and submit to Innovative Knowledge Worx

- Instructor will provide feedback and guidance based on selected exercises.

- Delegates will have to use computers or tablets during group discussions

- Faculty supervision to work on any assignment related projects.

Some of the classroom time will be replaced by online activities, such as instructional videos exercises. The online material will serve mostly as a supplement and as primary tool for lectures and exercises that can be conducted better online

Certification

After successful completion of the course and assignment the participants will receive a certificate of competence, which carries 36 credits NQF level 5

Duration

3 days

Teaching methods

Lectures, Practical exercises, Case Studies

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Registration Form

Advanced Electronic and Records Management Course

Costs per Delegate: R8 500 (excl VAT)

Company Details	
Company Name	
Vat Registration	
Order Number	
Physical Address	
Postal Address	

Contact Person		Contact Person (Accounts)	
Title:		Title	
Tel. Number:		Tel Number:	
Email:		Email:	

Delegate Name		Delegate Name	
Surname		Surname	
Designation		Designation	
ID Number		ID Number	
Tel Number		Tel Number	
Cell		Cell	
Email		Email	
Course Name		Course Name	
Course Dates		Course Dates	

Delegate Name		Delegate Name	
Surname		Surname	
Designation		Designation	
ID Number		ID Number	
Tel		Tel	
Cell		Cell	
Email		Email	
Course Name		Course Name	
Course Dates		Course Name	

3 quick easy steps to register…
• **Step 1**: Complete the Registration Form (authorized-signed) and fax /scan or email to the details provided in order for a provisional registration and a pro-forma invoice to be issued to you.
• **Step 2**: Email or fax a copy of the proof of payment (either deposit slip or electronic transfer), prior to the date of training, in order to have your booking confirmed.

- **Step 3**: A course confirmation with all relevant information will be sent to you as a confirmation of your booking, on receipt of payment.

INNOVATIVE KNOWLEDGE WORX – Banking Details

Account Name	INNOVATIVE KNOWLEDGE WORX (Pty)Ltd		
Bank	NEDBANK	Account Number: 1147706476	Branch 198765
Terms and Conditions			

- **Fees**: All fees and dates are current at the time of going to print: however, we reserve right to change them.
- **Confirming a Booking**: Your reservation will only be confirmed once we receive your booking form and proof of payment or purchase order.
- **Payment**: Payment can be made by cheque or by electronic transfer, and must be received prior to training dates. Please quote the refence number from your invoice so that payment can be tracked. Your reservation will be cancelled should payment not be received prior to the training date unless a purchase order is provided.
- **Cancellation and Substitutions**: All cancellations must be done in writing and emailed directly to IKWORX (Innovative Knowledge Worx). The following charges apply if you cancel prior to the course: Less than five working days (5) weeks – 100% of the course fee. Substitutions can be made at any time without incurring a penalty. Please inform us in writing so we can make the necessary arrangements for the new learner.
- **Transfers & Postponements**: The transfer option only applies to delegates who are transferring to a different date for the same course. Transfers can only be made up to five (5) working days prior to the course date, after which point the registrations considered to be a cancellation. The option to transfer can only be used once within a period of (3)three months, after which non-attendance will be treated as a cancellation and all outstanding invoices will be due. If a delegate uses the transfer option, the original course invoice and the transfer invoice remain due, even if the transfer reservation subsequently cancelled.

I have read and understand all the terms and conditions. (Authorised to Sign)

Name:	
Designation:	
Signature:	

Submit your Registration Form to:

Contact Person	Telephone	Fax	Email
Veronica Mogwerane	011 464 5065	086 403 7914	veronica@ikworx.co.za
			info@ikworx.co.za

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