Southern Africa Corporate Training

ELECTRONIC RECORDS MANAGEMENT WORKSHOP
19 - 21 October 2022
Protea Hotel Fire & Ice! Pretoria Menlyn

Workshop Overview

Information and Records Management is an important area of Information Management which includes the retrieving, acquiring, organising and maintaining of information as well as the distribution and communication of information to the desired audience.

The **workshop** focuses on theoretical, practical elements and the perspectives of the information managers, user-centered needs and the business.

Our workshop is designed to meet the needs of all types of organisations and levels of individual experience and forms the basis of a professional development programme building the foundation activities.

Key Learning Objectives

At the end of the course, delegates will be able to:

♦ Understand the business benefits of Electronic Document and Records Management System (EDRMS), Information Management and Enterprise Content Management (ECM)
♦ Learn how to manage Records Management projects by working from a business strategy
♦ Identify the main Information Management tools/systems and their use

Programme Outcomes

The programme will help you develop Information Management practices within your organization by understanding:

♦ What is ECM and how Information and Records Management fit into the picture
♦ The benefits Information and Records Management offers to the organization
♦ How Information and Records Management fits into the business
♦ The practical steps an enterprise needs to follow to implement an ECM system
♦ Practical demonstration of systems (open source & proprietary)

R9 950 pp

Discount for government officials

Who Should Attend?

The workshop is suitable for: Records Managers, Document Managers, Registry clerks, Registry Managers, Content Managers, Records & Information Managers, Business Analyst, ECM Project Managers, ECM Administrators, Archivist, Knowledge Managers, CIO, CEO, IT Specialist, Information Management Specialist, System Developers, HR Practitioners.

Teaching Style

Highly interactive workshop and lecture

Certification

An attendance certificate will be issued after completion of the workshop.

Register now online
www.southernact.co.za

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ELECTRONIC RECORDS MANAGEMENT WORKSHOP

Implementing Electronic Records Management

DAY ONE

8:30-9:00   **Registration** (Welcome and Programme Outline)

9:00 - 10:00   Introduction (background in Information and Records Management.
Enterprise Information Management can be big words that sound intelligent but do you know where exactly your organisation fits into this big picture.
We explain each of the following industry terms and give you direction:
- Electronic Document and Records Management Systems (EDRMS)
- Enterprise Content Management (ECM)
- Knowledge Management Tools (KMT), etc.

10:15 – 11:00   Information Governance (IG)
Information Governance is the activities and technologies that organisations employ to maximize the value of their information while minimizing associated risks and costs. Allow us to explain "what is IG and why is it hard".

11:15 – 12:00   The basic checklist when looking for an ECM / EDRMS Solution
Ever felt like you wish you had been exposed to a solution sooner.
Here we addressing unfortunate decisions made by organizations when trying to select or implement an Information Management Solution. This is a best practice approach from lessons learnt.

12:00 – 12:45   **Lunch**

12:45 – 14:00   User requirements for an ECM / EDRMS Implementation
We teach you how to gather requirements, who should gather requirements and the task involved in the process.

14:00 – 15:00   Scanning / Capturing / Digitization Fundamentals
Documents can be hard-copy, soft-copy on your local computer or remote computer. From a given source, a scanner for example, you build a Capture Profile that sets the options you want for document indexing, workflow, image processing, mode, and more. *We focus on what to capture, how to capture and who captures. We look at the process of Digitization (scanning) and best practice approach*

15:45   Closure

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DAY TWO

8:30 – 10h30   Electronic Records Management (ERM)
- ERM Standards (SANS / ISO) and ACT's
- Planning and Managing an ERM Programme
- Managing the Creation, Use and Disposal of Electronic Records
- Preserving Electronic Records

10:45 – 11:30   Searching
Finding information is a challenge in organizations with or without Information Management tools. *We teach you the basic standard requirements for information finding and industry best practices.*

11:30 – 12:00   Business Process Automation (Workflow)
Business process automation (BPA) is defined by as the automation of complex business processes and functions beyond conventional data manipulation and record-keeping activities, usually through the use of advanced technologies "Gartner". Here we teach you how to achieve the following benefits:
- Establish a clear approval hierarchy
- Streamline communication in your business process
- Enforce accountability

12:00 – 12:45   Lunch

12:45 – 13:45   Digital Signatures
The concept of signing documents electronically. Learn the difference between a Digital Signature / Advanced Electronic Signatures and Electronic Signature. Which is suitable for your organisation?

14:00 – 15:00   Business reporting for your organization using Business Intelligent Systems.
Learn how to provide your organisation with reports that can assist to make better and smarter business decisions faster with Business Intelligence.
- What is Business Intelligence?
- What are the problems?
- What are some benefits of Business Intelligence?

15:00   Closure

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DAY THREE

Information Management Tools

Attendees get to see Information Management solutions in action. Get to ask relevant questions about the implementation checklist.

The Information Management tools are:

♦ **SigningHub**

   Electronic Signature system (signing documents digitally).

♦ **Alfresco**

   Alfresco is an Open Source Document and Records Management Systems.

♦ **Owncloud**

   Owncloud is a file sharing platform with document management functionality.

♦ **HP Smart Scanning**

   We demonstrate live scanning of a paper record into a file plan / Classification scheme

We take you through each system user interface, the benefits and tell you the budget requirements for a successful implementation using the same business case.

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Delegate Registration

Register online now and secure your space. . . **www.southernact.co.za**

Please Note: *This fee includes workshop materials, certificate of attendance, morning refreshments, lunch and afternoon refreshments.*

Phone: +27 82 535 2942

Email: info@southernact.co.za

Delegate Information

Please provide information as you wish it to appear on your name tag and on your certificate of attendance.

Title	Name and Surname	Designation	Email

AUTHORISING PERSON

Full Name: _____

Position:_____

Email: _____

Signature: _____Date:_____

YOUR ORGANISATION

Company:_____

Address:_____

Country:_____ Postcode:_____

Registration fee must be paid into our bank account by means of credit card, EFT and deposit. Payment must be made to the following banking details:

Southern Africa Corporate Training

First National Bank

Cheque Account

62494561105

Branch Name: Grove

Proof of payment can be scanned and email to info@southernact.co.za. Registration will NOT be confirmed until payment is received.

Terms and Conditions

1) Cancelation - 14 days prior to the workshop, 50% of the registration fee is refundable, 13 to 6 days prior to the workshop, 30% is refundable. Within 5 days of the workshop, 15% is refundable. NO REFUNDS FOR NO SHOWS.

2) Delegates are responsible for making their own transport and accommodation arrangements. We can assist up-on request and provide recommendations.

3) SouthernACT reserves the right to alter this programme without notice or penalty and in such situations no re-funds or part-refunds or alternative offers will be made. Should SouthernACT permanently cancel the event, for any reason whatsoever, the client shall be provided with a credit of the equivalent amount towards the cancelled event.

4) In the event of unforeseen circumstances SouthernACT reserves the right to change the programme content, the speakers, the venue or the date. You will be notified no less than 5 working days prior to an event.