Electronic Documents Management and Digital Information Centre Course

Accredited by
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 and technical staff. Those involved in planning, developing and implementing an EDRM solution or Digital Information Centres. 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 a document and records management solution. Major emphasis will be placed on change management of the digitization process and implementation of the strategies of change management. One of the business challenges at present is the lack of knowledge regarding the implementation of Electronic Records Management System. The training will further provide technical and theoretical principles behind the establishment of digital information centres in an effort to promote digital curation and easy access to information in line with ISO 15489 and ISO27001 principles. It 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 Digital Information Centres training is designed to deliver advanced concepts in document and records management and setting up Digital Information Centres. 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 Records Management, and an Overview of Records Management terminology, concepts and procedures to successfully manage Records in today's offices. This course will give delegates a thorough understanding of the principles behind the digitization of archival records. 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
- Digital archiving and curation principles
- 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
• Digital Preservation
• Records and the transition to the digital
• Managing a digitization project
• Content development, including, accession and selection criteria, digitization guidelines or collection development focus
• 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.
• Preservation and collaboration, including repository/archive development, data sharing, perspectives on digital preservation versus digital access, staffing, cost analysis, benefit analysis, and other economic/budgetary issues

Objectives

The course will achieve the following objectives:

• Achieving a digital strategy under a tight budget / tough economic situations
• Provide a consistent understanding as to what EDRMS and ECM systems and Digital Information Centre are, and highlighting the differences between them
• 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.
• Digital Knowledge Centres, the creation and use of
• Strategic planning for the transition to digital record keeping
• Digital representation and compression- publication format, scanning, OCR, editing, network platforms, design of a LAN, server management
Outcomes

- Ability to implement change management and digitization by equipping delegates with strategies and to implement changes
- 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

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 Intelligent Africa
- 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

4 days

Teaching methods

Lectures, Practical exercises, Case Studies