

# Documents & Records Management

18 – 22 February 2018

Muscat / Sultanate of Oman

## Introduction:

This course is designed for workers who have responsibilities for record management whether they are in the public or private sector.

The course will expose delegates to recent knowledge in records management as well as consider the opportunities and challenges brought by electronic information technologies. Participants will also learn various issues relating to the legal and organizational environment for conventional and electronic record keeping which will include: the protection of records as evidence, the need for compliance with evidence laws, the challenges of meeting audit requirements, the importance of adequate budgets and the importance of identifying relevant legislation and policies. Organizational issues that will be considered include understanding organizational cultures and addressing the unique qualities within the organization, particularly with regard to human resources, politics, policies, the physical and economic environment. The course will also focus on digital preservation and archival description, archival codes of ethics and key issues involved with applying standards.

## Course Objectives:

The course will help participants to development a body a knowledge and capacity in the management of Public Sector Records including:

- ✓ Principles and Context
- ✓ Organizing and Controlling Current Record
- ✓ Building Records Appraisal System
- ✓ Managing Records in Records Centers
- ✓ Managing Archives
- ✓ Preserving Record
- ✓ Emergency Planning for Records and Archives Services
- ✓ Developing the Infrastructure for Records and Archives Services
- ✓ Managing Resources for Records and Archives Services
- ✓ Strategic Planning for Records and Archives Services
- ✓ Analyzing Business Systems
- ✓ Understanding Computer Systems :An Overview for Records and Archives Staff
- ✓ Automating Records Services
- ✓ Managing Electronic Records
- ✓ Managing Financial Records
- ✓ Managing Health Records.
- ✓ Managing personal records

## **Course Content:**

### **Office organization.**

- ✓ Describe organizing as a core responsibility of office professionals.
- ✓ Illustrate their position in the organizational structure and the route of documentation they need to manage
- ✓ Identify and review the role of administration in their organization
- ✓ assess their own organizing ability for effectiveness and efficiency
- ✓ Describe the need for effective systems as support for efficient administration.
- ✓ Rate the effectiveness of their department system.

### **Record Management:**

- ✓ explain why organizations record and keep information
- ✓ Define “information management”, “records management “and “record”
- ✓ Name and describe the type of records that are specific to a contract in a selected business sector
- ✓ Describe the practice of records management
- ✓ Outline the process of managing physical records
- ✓ Discuss confidentiality issues.
- ✓ Illustrate how to locate and provide records to users on request.
- ✓ List the design components of a record keeping system
- ✓ Understand the importance of maintaining accuracy, safety and confidentiality of stored records
- ✓ List new trends in paper based document management.

### **Paper records processing systems**

- ✓ Explain the role of proper desk organization in records management.
- ✓ Outline the options in the paperwork and e-mail route
- ✓ Assess the efficiency of their departments’ current information storage and filing systems
- ✓ Describe classification, tracer, cross reference and index systems for paper based storage

### **Electronic record processing system.**

- ✓ Electronic records processing systems
- ✓ Explain the benefits and risks of electronic records management
- ✓ Understand how to deal with incoming mail and tasks
- ✓ List some of the “best practice” procedures of e-mail management
- ✓ Appraise the need for an e-mail policy in an organization

- ✓ Define the organizational requirements for storing records electronically.
- ✓ Outline the processes of locating, retrieving, copying and dispatching information in an electronic storage system
- ✓ Illustrate the importance of secure storage of electronic records

### **Optimizing technology of documentation**

- ✓ Highlight some of the consequences for their department if information is not managed properly
- ✓ Understand the importance of dealing with confidential documents and issues
- ✓ Describe the processes of document scanning and tracking
- ✓ Highlight the legal requirements, policy and best practice of document retention in the context of their organization and industry
- ✓ Describe the concept of “archiving”
- ✓ Evaluate the importance of optimizing technology e.g. e-mail, bar coding, scanning.

### **Who should attend?**

This course will be of immense benefits to

- ✓ Officers, Managers,
- ✓ Team Leaders,
- ✓ Directors who have responsibilities for records management and those who wish to acquire requisite skills for future roles in record management.