



TRAINING

**UNLEASHING YOUR POTENTIAL**



Imsimbi Training proudly presents

## **Data & Records Management – 2 DAYS**

Imsimbi Training is a fully accredited training provider with the Services Seta, number 2147, as well as a Level 2 Contributor BBBEE company.

This course is accredited by the Services Seta and material covers unit standards 110009 at NQF level 4 worth 4 credits.



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## COURSE OBJECTIVES

This course focuses on how to develop best practice record and data management systems. Efficient record and data management systems are essential for any organisation. Administrators, Office Managers and Personal Assistants all need to develop and improve their record and data management techniques and systems. This course covers all aspects of record and data management related to understanding the processes involved, the guidelines that apply, the steps that need to be taken, best practice examples and easy reference templates for use, storage and retrieval of data.

## COURSE OUTCOMES

**Upon completion of this course, the participants should know the following:**

- Record and data management systems and the related processes
- Overview of the guidelines that relate to record and data management
- Record and data management: data, storage and retrieval aspects
- Planning a storage and retrieval system
- Implementing and maintaining a filing system
- Guidelines for retention and disposal of records
- Archiving and disposal of records
- Practical tips and templates for use at work
- Practical application to own work environment and related types of data that are worked with
- Good administrative practices and processes
- Using technology effectively for data management
- Quality Management Systems



# COURSE OUTLINE

## Day 1:

- Setting up a Data Management System
- Evaluating your current data management system
- Data Classification and Referencing System
- How To Build A Referencing System:
- Data Management Assessment Process
- Controlling Access to Data and Ensuring Effective Security

## Day 2:

- Data Retention and Disposal
- Filing Systems
- Information Systems - Using Microsoft Outlook to its maximum
- Being Organised
- Stationery management systems
- Confidentiality of information



# COURSE CONTENT

## Introduction:

- ✓ Setting Up a Data Management system
- ✓ Data Classification and Referencing System
- ✓ How To Build A Referencing System
- ✓ Data Management Assessment Process
- ✓ Controlling Access to Data and Ensuring Effective Security
- ✓ Data Retention and Disposal
- ✓ Filing Systems
- ✓ Information Systems - Using Microsoft outlook to its maximum
- ✓ Being Organised
- ✓ Policies and Procedures
- ✓ Quality Management System
- ✓ Confidentiality
- ✓ Stationery

