Unleashing Your Potential

IMSIMBI TRAINING

Course Outline

Data & Records Management

2 DAYS

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

Imsimbi Training is a fully accredited training provider with the Services Seta, number 2147, as well as a Level 1 Contributor BBBEE company and 51% black owned.







julius@imsimbi.co.za
tammy@imsimbi.co.za
margaret@imsimbi.co.za
prince@imsimbi.co.za
gloria@imsimbi.co.za

QCTO Quality Council for Trades & Occupations · ETA Transport Education Training Authority Driven by Vision · SERVICES SETA · cathsseta · ETDP SETA · MICTSETA

Course Objectives

Welcome to the exciting world of Data Records and management.

From the start of an organisation, data, whether paper driven or electronic, and records are formed.

Correspondence, such as letters and emails, is received and copies of outgoing correspondence are made; evidence is kept of any financial transactions; communication between the organisation and its clients must be retained, minutes of meetings and decisions are kept. Everything that an organisation does is recorded.

These records or data are the "memory" of the organisation. No one in any organisation can remember everything. Even if someone were to remember everything, there is still the problem that employees change and that new employees must know what occurred previously to carry on sensibly and purposefully.

The documents and electronic records are evidence that certain steps have been taken or transactions concluded. There must be evidence of what was done and how it was done. The data must be accessible. When the organisation is small and there are few records, it is easy to trace a particular document. The larger the organisation and the greater the number of records, the more difficult it is to find information

This course focuses on how to develop best practice record and data management. 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 completing this course, the participants should know the following:

- Manage administration records.
- Approach documents and records effectively and efficiently.
- Control and deal with confidential information and documents.
- Control and evaluate ordering and distributing office stationery.
- Implement control measures with individuals.
- Develop and maintain systems for securing and monitoring the flow of data within the organisation.





Course Outline

Day 1

- Setting Up a Data Management System
- Introduction to data management
- Ten general principles of data management
- Administrative systems required in a business environment
- Internal, External and Integrated systems
- Data Management within the Public Sector
- Record control mechanisms
- Disposal Programme
- Data Classification and Referencing System
- How to Build a Referencing System
- Data Management Assessment Process
- Controlling Access to Data and Ensuring Effective Security – Confidentiality
- Confidentiality
- Laws on protection
- Data Log
- Workflow





Day 2

- Data Retention and Disposal
- Disposal of records
- Destruction of records
- Maintaining your Data Management System
- Filing Systems
- Deciding what to file
- How do we organise files?
- Labelling each file
- The Filing Index
- Some filing rules
- Electronic Filing
- What is an Electronic Filing System?
- Key Components to Filing Electronically
- Top Benefits of Switching to an Electronic Filing System
- How to Successfully Set Up an Electronic Filing System
- Best Practices for Building File Naming Conventions
- Create a Keyword List
- Key Components of a File Register





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- How an Index can help navigate between sheets in Excel
- The Importance of Folders
- Best Practices for Folder Organisation
- Information Systems - Using Microsoft Outlook to its maximum
- Being Organised
- Being professional
- Managing Stationery in the Office
- Administrative Operating Procedures
- Implement Control Measures with Individuals
- Procedures for dealing with non-conformances





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