

Document Control and Records Management in the 4IR

"Virtual Workshop"

"Managing Records in Support of Business Requirements"

Date: 15 – 17 September, 2021



COURSE OVERVIEW

This 3-day course is a combination of the two back-to-back courses: Document Control and Records Management. Data is increasingly building up on who we are, who we know, where we are, where we have been and where we plan to go, at a global level. These broad strips of new digital data are as valuable for economies and societies as they are fraught with questions about privacy.

What measures has your organization implemented to become more productive and profitable from the 4IR and all the vast technology it comes with? How will the Fourth Industrial Revolution disrupt data management?

Records management today is a combination of many subjects, including retention, security, privacy and governance of both data and information. It is the customer/user-facing side of managing information and is truly a change management and people (education) issue. With the introduction of new technology that enables us to communicate in many different and innovative ways, it is more important than ever that the documents, data and information contained in your organization are properly managed. Many documents may need to be retained long after you have left the organization, and in some cases more than 50 years. Managing data throughout its life relies on effective people, processes and technology.

This course is delivered through a 4-element framework that defines the purpose of document control and records management; discovers the rules that the work has to abide by; develops different methods and processes using new and existing technology; and delivers education and learning to co-workers and to those who will be responsible for ensuring that the documents are maintained throughout their life.

Attend this essential Effective Records and Documents Management training course to gain actionable strategies for transferring to, and managing digital records. Leave the day with the knowledge to excel in information management and take away practical guidance for the retention and deletion of records.

Document Control and Record Management in the 4IR

MEET YOUR FACILITATOR



Dr Deonie Botha

Deonie is the Associate Director, Clients & Industries responsible for Knowledge management at Deloitte & Touche Africa.

In addition to her involvement in KM from an academic perspective, she has more than 15 years of experience in proactively connecting KM systems to business processes and resources. She is proficient in the design, development, and implementation of KM strategies across businesses and geographies. Her experience in managing KM capabilities is supported by a distinguished academic career.

Deonie participates in South African and global initiatives aimed at creating eminence around KM and specifically the digitalisation of knowledge work. She was responsible for Innovation and R&D at the MICROmega Ltd Holdings Group and provided input into the IT Innovation Strategy for the Sebata Group of companies. This included the development of a framework to ascertain the readiness of local government structures in the African continent for Smart City initiatives. She was responsible for KM and Technology

structures in the African continent for Smart City initiatives. She was responsible for KM and Technology Intelligence (mining & mineral processing) at Anglo American and liaised with the South African and international innovation platform (NineSigma) to provide an Open innovation service to Anglo American. At Kumba Iron Ore she developed an in-depth understanding of the commercial side of the iron ore industry and was involved with the implementation of a CRM system for Kumba. Deonie developed a KM methodology for the mining project management environment. She lectures on KM and remain involved in academia as an adjunct faculty member at the University of Pretoria, Unisa and WITS. She has been invited to present workshops hosted by the ILO (Europe), ORP (South America) and the Chamber of Commerce of the UAE. She is a prolific author and her publications include articles, study guides and two books. She holds a doctorate and two masters degrees. Currently, she is working towards a MSc in Mining Engineering at the University of the Witwatersrand, Johannesburg

Dear Delegate,

Records management professionals face various challenges in their day to day discharge of duties which are unique to their profession. This course is designed to give records management professionals an overview of the characteristics and requirements of records management, particularly regarding aligning records management practices with the relevant ISO standards. They will also understand how electronic records management fits into the broader framework of records management. Many best practices and guidelines regarding records management apply equally to electronic records. Records management professionals will leave the workshop with a plan of action of how to align their records management practices to internationally recognized best practices.

The course will be instructor-led with theoretical and practical discussions. After completing this workshop, delegates will be able to:

- Understand the implications of new legislation on records management and guide the organisation to becoming compliant
- Create a strategic plan for a records improvement process
- Align the records management programme to the corporate goals and objectives
- Provide input into the Enterprise Content Management initiatives of the organisation.
- Prepare the organisation for Information Governance, beyond IT Governance
- Assist the organisation in balancing the needs for Privacy versus Accessibility of records
- Lead the process for managing social media as records where appropriate.
- Make informed decisions as to whether the "Cloud" is a suitable repository for organisational records
- Look beyond traditional "File Plan" thinking and start developing value-based records classification schemes
- Inform the organisation of the pros and cons of Share point as a records management system.

Learning Outcomes

- Learn Standards and best practice for records and documents management
- Acquiring the relevant skills needed in records governance and documentation compliance
- Understand strategic planning and management for records and archive services
- Evaluating information governance, risk and compliance issues that impact records management
- Developing and implementing an effective records management policy
- Information governance – electronic document and records security
- Administration, management and development of an EDRMS
- Appraisal and disposal of records and information management
- Quality, integrity and security measures planning
- Change management requirements and planning

Who Should Attend?

- Records Managers, Document Controllers
- Project Managers, Business Development Managers
- Registry staff, Administrators, People supporting management and /or working in project teams
- IT staff involved in any aspect of records management
- Business Unit Managers who are responsible for records management
- Units such as Human Resources or Finance who need to manage their units records
- Company Secretaries, Marketing Managers/Specialists, Campaign Managers, Public relations Managers
- Information Governance Professionals
- Departmental Managers responsible for Document Control or Records Management
- Representatives from National and Provincial Archive
- Representatives from watchdog organisations responsible for Industry Governance

Document Control and Records Management Training

DAY ONE

1. Document Control Introduction and Definition – Purpose and goals

- Definition of document control
- Distinguish between Document and Records Management
- Document life-cycle management
- Reasons you need to control documents and the goals you have for your document control process

2. Document Control Discovery – Risks and Rules

- The types of documents you control
- Documents coming from vendors and suppliers
- Rule, regulations, and risks
- Standards and specifications

3. Document Control Development – Processes, Policies and Retention

- Processes and systems to control documents
- Managing conflict with enterprise business policies
- The length of time you need to keep documents, data and information

4. Document Control Delivery – Educating for the Future

- Educating your co-workers and helping them understand document
- Audit and compliance
- What the future holds

5. Standards and Best Practice for Records and Information Management

- Introducing International Standards and theories behind Records and Information Management (ISO Standards)
- Managing Records in line with the Standards
- ISO 9001 Documentation standard

6. Introduction of Information Governance and Documentation Compliance

Identification of records & Information management standards ISO 9001 – ISO 15489 and Information Security Standards ISO 27001

- Creating information and document audits
- Creating a file plan, meta data plan, retention plan, schedule and other important information controls

Concepts and set up Components

- Compliance, controls and security
- Legislation, standards and regulation
- Business classification scheme and taxonomy
- Document controls
- Understand security, governance and compliance

End of Day One

Document Control and Records Management Workshop

DAY TWO

1. Records Management Definition – Purpose and goals

- Definition of records management
- Where it fits within the information governance framework
- Enterprise goals for managing data and information
- Matching goals to purpose and business strategy

2. Records Management Discovery – Risks and Rules

- what you have and why you have it
- How information is used in the organization

3. Identifying the risks Records Management Development – Principles and Policies

- Managing digital data and information with paper records
- Creating the “dReaM” team to govern the records management processes
- Accessibility, availability, and retention of information
- Protection, security and sharing of information

4. Records Management Delivery – People and Educating for the Future

- Accountability – working with the business units to deliver governance
- Compliance and audit
- Technology and what the future holds

5. Information Governance – Electronic Document and Record Security

- Preserving electronic documents and records in their
- Warehousing with search-and-indexing technology
- Key principle for re-establishing trust and accountability
- Records management support corporate transparency

6. Administration, Management and Development of an EDRMS

7. Selecting and Implementing EDRMS

- Share Point E-Records Management
- Reviewing the capabilities and features of Share Point RecordsCentre
- Document libraries
- Content organization rules
- Retention schedules

8. Appraisal and Disposal of Records and Information Management

- Define the meaning and various features of a sound document appraisal system
- Establish the various elements of a document disposal management system
- Assess the tried and tested steps for migrating documents to storage without losing critical information

9. Counter Disaster Preparedness Plan

- Vital records

10. Change management requirements and planning

- Identifying what needs to change in your organization in order to ensure the highest level of success in managing your business Documents and records

11. Quality, integrity and security measures

- Determining there liability and quality of your EDRM infrastructure and system
- Defining the link between various business units to support the efficiency of your records management process
- Examining the various Botswana and international (ISO) standards to achieve best practice in reliability, integrity and authenticity of electronically stored information
- Identifying where the potential risk exist in your EDRM system

Document Control and Record Management in the 4IR

DAY THREE

1. How can Records and Documents Management support organizations in the Fourth Industrial Revolution?

- Ensuring that devices are connected to the Internet of Things and that knowledge can be created from the connectedness of devices
- Identifying and leveraging skills and competencies that robots cannot “learn”

2. How new technologies can assist RIM

- Artificial Intelligence as Artificial Assistance
- Machine learning
- Indexing and classification (Auto tagging)
- Analysis of e-mail and other unstructured content)
- Assistance with eDiscovery, policy audits, investigations

3. Opportunity or Threat (Paradigm shifts)

- Information is at the heart of business disruption
- The choice to disrupt or be disrupted lies with you
- New technologies can assist with repetitive mundane tasks
- Savvy records managers will focus on and learn new value-add skills
- There will be pain. How much, depends on whether you force the changes or are forced.
- Your organisation will change. Your organisation is changing.
- Understand, manage, optimise, leverage information assets.
- Add value. Be relevant.

4. The Future Organisation

- Knowledge Management in the 4IR
- MIS - Management Information Systems
- King iv - Corporate Governance and IT Compliance
- IT Governance Framework and Policy Development regarding Knowledge and Data Management.
- Robotics and Record Keeping
- Internet of Things and Big Data Management
- Artificial Intelligence and 4IR with regards to Knowledge Workers
- Digitization of Documents
- Future of Archiving

End of Workshop

08h30 – 09h00	Registration
10h00 – 10h15	Break
13h00 – 14h00	Lunch
15h00 – 15h15	Break
16h30	Close of workshop



Registration Form

Please write in BLOCK CAPITALS

ZAMBEZI PRIDE

Document Control and Records Management in the 4IR Virtual Workshop

COMPANY AND DELEGATE DETAILS

Organization:

Nature of Buins:

Address:

City: Post Code:

Phone: Fax:

VAT:

Delegate Details:

1. Full Names:

Position:

Email:

2. Full Names:

Position:

Email:

3. Full Names:

Position:

Email:

4. Full Names:

Position:

Email:

5. Full Names:

Position:

Email:

FEES

Price per Delegate = **R8, 999.00**

Book 5 spots and get 6th spot for free!!

Please add the detail of the 6th Delegate who'll attend for free.

Full Names:

Position:

Email:

Att: Luke

info@zambezipride.co.za

DATE: 24th – 26th February, 2021

VENUE: Virtual Workshop

PRICE PER DELEGATE = **R8,999**

Book 5 & get 6th seat for free. Book Now!!!

AUTHORISATION

Signatory must be authorized to sign on behalf of the contracting Organization

Name:

Position:

Email:

Signature:

Date:

THIS BOOKING FORM IS INVALID WITHOUT THE SIGNATURE

Full payment is required within 5 working days. Payment must be received prior to the event date. **Zambezi Pride** reserves the right to refuse entry into the event should full payment not have been received prior to this date. Cancellation will be charged under the term set out below;

Cancellation, No Shows & Substitutions

Cancellations received in writing 14 prior to event will attract a 50% cancellation fee. Should cancellations be received between 10 days & the date of the event the full event fee is payable and non-refundable.

Non- payment or non-attendance does not constitute cancellation. No show will be charged the full registration fee. Cash alternatives will not be offered, however, substitutes at no extra charge are welcome.

3. Alterations to advertised package: **Zambezi Pride** reserves the right to alter this programme without notice or penalty and in such situations no refunds or part-refunds or alternative offer will be made. Should **Zambezi Pride** permanently cancel an event, for any reason whatsoever, the Client shall be provided a credit of the equivalent amount paid towards the cancelled event. In the case of a postponed or cancelled event, **Zambezi Pride** will not be responsible for covering airfare, accommodation, or other travel cost incurred by Clients.

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Bank Name: First National Bank

Account Type: Cheque Account

Name of Account: Zambezi Pride (Pty) Ltd

Account No: 62734429740

Branch Code: 254005

Swift Code: FIRNZJJ

Branch Name: Randburg