

Information and Records Management Using Existing Tools

One-day course

- 22 March 2012
- 14 June 2012
- 27 September 2012

Innovation Centre, University of Hertfordshire, Hatfield AL10 9AB

£25

Early Booking
Discount

Choice
of three
dates



- Managing information and records on a budget
- Setting up an IRM framework
- Applying records management to shared drives and emails
- Freely available tools and resources



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Overview

This course is aimed at information managers and records managers and those tasked with information and records management functions as part of a wider remit. The content is directed at helping organisations to improve information management without expenditure or at minimal cost.

The course will mix lively discussion with sound advice. You will take away from this course:

- ideas for running your IM function better
- how to justify your function and promote your services to the rest of the organisation
- advice on managing an information management improvement programme
- how to carry out an information audit
- advice on creating 'Approved Shared Drives' and using other existing IT tools for RM
- a list of free RM tools and resources.

Programme

Session 1 looks at the need for information and records management in terms of compliance and efficiency. It discusses how to position and justify the RM function in the organisation and looks at ways of combining effort with related functions such as information governance and information assurance.

Session 2 offers a framework for good information and records management in terms of roles and responsibilities, policies and procedures and tasks and training. It looks at ways of distributing and embedding records and information management throughout large and small organisations. It advises on how to manage a programme of improvement and how to measure its success using self-assessment tools.

Session 3 discusses the implementation of approved shared drives; how to create a

classification scheme for shared drives and how to apply records management control to them so that they can be reliably used to store corporate records. It advises how access can be controlled and retention scheduling applied. It suggests ways of migrating the contents of existing shared drives to the new structures and dealing with the residue.

Session 4 looks at applying records management control to your existing IT infrastructure and paper filing: what can be safely stored on shared drives and email accounts and what for legal admissibility purposes should be kept in hardcopy or an ECM/EDRM system. It looks at tools you might already have for managing and searching information such as may be available with your Microsoft Enterprise licence. It looks at open-source ECM systems and free collaboration tools and cost-effective ways of implementing them.

Session 5 gives practical advice on carrying out information audits. This session gives delegates the benefit of Cimtech's many years of information audit experience. It offers 2 options: to use central resources or to use local staff to complete distributed questionnaires. It shows what an audit can be used for, how the audit can best be managed, what tools to use, how to include databases and different media, how the data can be analysed and how the results can be presented.

Session 6 provides information on tools and advice that are available for free or very low cost. These include information audit tools, classification schemes and retention schedules, records management policies and procedures, online discussion groups and societies.

A final discussion session rounds up the day.

Programme

09.15 *Registration and coffee*

09.30 **Introduction to the course**

09.40 **Session 1 What is Information Management and why do you need it?** How Information Management fits with Records Management, Information Governance, Information Security and Information Assurance. Overview of public and private sector compliance requirements. Information Management for efficiency savings and improved services. Risk-based approach.

10.20 **Discussion**

10.35 *Coffee break*

10.50 **Session 2 What framework do you need?** Roles and responsibilities, policies and procedures, classification and retention scheduling. Best practice and standards. Embedding information management throughout the organisation. Managing a programme of improvement. Continuous staff development and training. Measuring success with self-assessment.

11.40 **Discussion**

11.50 **Session 3 Organising shared drives** Principles and methods of design and control. Classification scheme options and consequences, folder and file naming conventions, search techniques and retention schedules. Migration and weeding methods.

12.45 *Lunch break*

13.30 **Session 4 What tools do you have?** What you can do with shared drives, email systems, data applications, intranets and paper storage. What is available with the MS Enterprise Licence and free ECM and collaboration tools. Legal admissibility issues.

14.20 **Discussion**

14.40 **Session 5 Information audits** How to carry out an information audit – options and opportunities. Direct or devolved audit. What works and what doesn't. Sample audit questionnaires.

15.25 *Tea break*

15.45 **Session 6 Further help** What is available for free, e.g. classification schemes, retention schedules, audit tools. Organisations you can join. Web sources and online discussion groups.

16.10 **Discussion**

16.30 *Close*

● *All sessions will be delivered by Cimtech senior consultants including Alison Gibney and John Walsh. Cimtech reserves the right to alter the timing and content of the sessions.*

Booking

Please complete the booking form overleaf and return to Cimtech as soon as possible. If you book a place and your plans change, an alternative delegate is welcome. If that is not possible, you may cancel your booking with a refund—less 10 per cent administrative charge—provided we receive notification in

writing at least 10 working days before the event. Cancellations received after that will be liable for the full amount. Special diets can be accommodated and a list of local hotels will be sent on request—please tick the appropriate boxes on the booking form. The early booking discount is available on bookings made at least twenty-eight days in advance of the course.

