

Archiving and Records Management



Archiving And Records Management Workshop

GOAL: Records are in every organization. From purchasing receipts to tax documents to communications, they need to be identified and managed properly. The method of records management that a company uses should be tailored to fit the needs of the organization. There are, however, some basic concepts in most records management systems. With our “Archive and Records Management” workshop, your participants will discover the basic elements of records management programs and different ways to manage records.

Objectives:

- Define records and archives
- Analyze records in context
- Classify records
- Understand different systems
- Maintain and convert records

Module One : Getting Started

Workshop Objectives

Module Two: Understanding Records

What is Records Management?

Defining Records

Archives vs. Records

Life Cycle

Module Three: Management of Records

What Is and Is Not a Record?

Record Programs

Management of Systems

Developing Standards

Module Four: Context I

Techniques for Analyzing Records

Collecting Information

Organizational Needs

Legal Demands

Module Five: Context II

Routine Process

Creative Process

System Analysis

Records Survey

Module Six: Classification

- Functionality
- Prioritize
- Assess and Review
- Develop a Tool

Module Seven: Paper-Based Systems

- Arranging and Grouping
- Building Files
- Elementary & Intermediate
- Metadata

Module Eight: Electronic Records

- Classifying
- Folders and Directories
- Groupings
- Metadata

Module Nine: Hybrid Systems

- Routine Processes
- Creative Processes
- Design
- Limitations

Module Ten: Appraisals & Systems

- Taxonomy of Values
- Macro Appraisal
- Strategy & Criteria
- Document & Review Decisions

Module Eleven: Record Maintenance

- Paper
- Electronic
- Create Archives
- Conversion

Module Twelve: Wrapping Up

- Words from the Wise



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