

Fundamentals of Filing and Archiving

About the Workshop

A record is anything that provides information. A record may be on any type of media, and is a fundamental part of organizations therefore records must be managed from the time they are created or received through distribution, use, and maintenance, until they are finally destroyed or permanently archived; this workshop was designed around filing, storing, retrieving and transferring records all part of the main records management programme.

Learning Objectives

Upon completion of workshop participants will be able to:

- Establish guidelines for developing vital records operating procedures
- Recommend solutions for common filing problems
- Implement a successful, suitable filing system

Target Audience

This course will appeal to a wide range of audiences and is intended for Office Managers, Administrative Assistants and Executives assistants.

Topics Covered

1. **What is Records Management?**
2. **Filing and Storage**
3. **Storage Method**
4. **Storage Equipment and Supplies**
5. **Straight Line Tabs**
6. **Choosing the Right Equipment**
7. **Six Steps in the Records Management Procedure**
8. **Retrieving, and Transferring Records**
9. **Archiving**
10. **Retention Schedule**
11. **Record Cycle**
12. **Common Methods of Records Transfer**
13. **Index Types**

Methodology

- Learning Concepts/Presentations
- Group Activities and Discussions
- Tips and Tools
- Individual and Team Exercises
- Role Plays/Case Studies
- Educational Videos
- Action Plan to ensure Application of the Learning

Duration: 6 hours