

# OUTLINE

## Archiving and Records Management

### Lesson 1

#### *Getting Started*

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Aims

### Lesson 2

#### *Understanding Records*

- What is Records Management?
- Defining Records
- Archives vs. Records
- Life Cycle
- Case Study
- Review Questions

### Lesson 3

#### *Management of Records*

- What Is and Isn't a Record?
- Record Programs
- Management of Systems
- Developing Standards
- Case Study
- Review Questions

## Lesson 4

### *Context (I)*

- Techniques for Analyzing Records
- Collecting Information
- Organizational Needs
- Legal Demands
- Case Study
- Review Questions

## Lesson 5

### *Context (II)*

- Routine Procedure
- Creative Process
- System Evaluation
- Records Survey
- Case Study
- Review Questions

## Lesson 6

### Classification

- Functionality
- Prioritize
- Assess and Review
- Develop a Tool
- Case Study
- Review Questions

## Lesson 7

### *Paper-Based Systems*

- Arranging and Grouping
- Building Files
- Elementary & Intermediate
- Metadata
- Case Study
- Review Questions

## Lesson 8

### *Electronic Records*

- Classifying
- Folders and Directories
- Groupings
- Metadata
- Case Study
- Review Questions

## Lesson 9

### Hybrid Systems

- Routine Processes
- Creative Processes
- Design
- Limitations
- Case Study
- Review Questions

## Lesson 10

### Appraisals & Systems

- Taxonomy of Values
- Macro Evaluation
- Strategy & Criteria
- Document & Review Decisions
- Case Study
- Review Questions

## Lesson 11

### Record Maintenance

- Paper
- Electronic
- Create Archives
- Conversion
- Case Study
- Review Questions

## Lesson 12

### Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

This course can be fully customised for your business team.  
Please contact us for more details and our team will happy to assist.

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