



Computerized Management of Institutional Records

Course Objectives

On completion of the course participants should be able to:

- Reinforce their understanding of the role of information in decision making
- Understand and apply best practices in records management
- Identify the best methods in managing records electronically
- Use at least one of the records management software's in keeping records
- Create database with specific attributes according to the workplace
- Understand and mitigate the challenges of computerised records management

Target Groups

- Records management officers
- Information officers
- Records managers
- Data clerks
- Registry officers
- Administration officers
- Systems administrators

Course Outline

- General management issues and principles
- Introduction to Institutional Record Management
- Definition and importance of institutional records.
- Types of institutional records (academic, financial, administrative, etc.).
- Challenges in manual record management.
- Overview of Computerized Record Management Systems (CRMS) ◻ Definition and features of CRMS.
- Benefits of computerized systems over manual systems.
- Examples of CRMS software (e.g., Microsoft SharePoint, Oracle, SAP). ◻ Designing a Computerized Record Management System ◻ System requirements analysis.
- Database design principles.
- User interface and user experience (UI/UX) considerations.
- Data Entry and Validation ◻ Techniques for accurate data entry.
- Data validation and error detection.
- Role of automation in reducing human error. ◻ Data Storage and Retrieval ◻ File organization and indexing.

- Search and retrieval techniques.
- Cloud-based storage solutions.
- Data Security and Privacy
- Importance of data security in record management.
- Encryption, access control, and authentication.
- Compliance with data protection laws (e.g., GDPR, FERPA). ◻ Records Retention and Disposal ◻ Policies for records retention.
- Legal and regulatory requirements.
- Secure disposal of sensitive records.
- Audit Trails and Accountability
- Importance of audit trails in record management.
- Tracking changes and access to records.
- Ensuring accountability and transparency.
- Integration with Other Institutional Systems ◻ Linking CRMS with financial, academic, and HR systems.
- Data sharing and interoperability.
- Challenges and solutions in system integration. ◻ Disaster Recovery and Business Continuity ◻ Importance of backup and recovery plans.
- Strategies for disaster recovery.
- Ensuring business continuity during system failures. ◻ Transitioning from Manual to Computerized Systems ◻ Planning and implementation strategies.
- Training staff and managing resistance to change.
- Evaluating the success of the transition.
- Action planning

Dates: 04th – 15th August 2025

Duration: 2 weeks

Course Costs: US\$2850

Venue: Pretoria, RSA