



Autonomy Education

Records Management for Records Managers

Autonomy is a leading worldwide provider of enterprise Document and Records Management (eDRM) software. Our solutions provide complete lifecycle Enterprise Content Management (ECM), from document creation and modification, to record declaration, retention, and finally disposal. The functionality is provided seamlessly through Microsoft Office System interfaces.

The Records Management for Records Managers training course prepares Records Managers to configure and maintain fileplans, including the modeling of physical archives, using the eDRM Web client during a hands-on workshop.

Our training courses are heavily oriented toward hands-on, practical experience to reinforce formal classroom instruction. Using fast-track training methods, the majority of training will take place in a workshop environment following preset training courses that will challenge the participant and aid them during the learning process.

- Course Name:** Records Management for Records Managers
- Duration of course:** 2 Days
- Audience:** Records Managers, Local Records Officers.
- Prerequisites:** Experience of Records Management concepts.
- Objectives:**
- To leverage the relationship between Meridio Document Management and Records Management.
 - Configure Meridio Records Management including fileplan creation, definition and assignment of disposal schedule chains and assignment of security markings.
 - Manage fileplans in terms of disposal, restructuring, disposal holds and disclosability.
 - Management of physical archives.
- Training Format:** Theory, Demonstrations and practical use of Meridio Records Manager solution.
- Classroom Capacity:** Autonomy maintains small class sizes (10 to 12 participants) in order to provide adequate individual attention.
- Delivery:**
- 2 Days of hands-on training.
 - Fully Documented Training Materials which set out the tasks and lessons planned for each day.

Training Centers: Washington DC, Chicago, Dallas, San Francisco, San Jose, or Cambridge, UK. Onsite training on request.

Classroom Fee: \$1,500.00 USD per public classroom delegate.

Onsite Fee: Delivered at customer site for \$5,000.00 USD per day with a total investment of \$10,000.00 USD plus travel and expenses.

Course Curriculum:

The Meridio Records Manager training course covers the following topics:

Modules	Objectives:
1) Overview of Meridio Records Management	<ul style="list-style-type: none">▪ Introductions▪ Brief overview of Meridio Records Management
2) Records Management Roles	<ul style="list-style-type: none">▪ User, groups and roles▪ Privileges
3) Fileplan Configuration	<ul style="list-style-type: none">▪ The disposal process▪ Classes▪ Electronic folders and parts▪ Physical folders and parts▪ Hybrid folders and parts▪ Electronic records and physical markers▪ Keyword hierarchies▪ Security▪ Utilizing a Meridio fileplan through SharePoint 2003 and MOSS 2007
4) Fileplan Maintenance	<ul style="list-style-type: none">▪ Class relocation and folder/record reclassification▪ Scheduling▪ Resolution of disposal conflicts▪ Reporting▪ Use of disposal holds▪ Managing disclosability▪ Managing physical archives
5) Course Review and Summary	<ul style="list-style-type: none">▪ Question and answer session▪ Course review and summary

For all training enquiries please contact the Autonomy Education department at training@autonomy.com