



**BASED ON A SAQA registered qualification
for Administrative Professionals in all
Services Sectors
SAQA ID: 115855 NQF Level 5, 5 Credits**

Record Management

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Who is this training Course for?

Managers or administrators who are responsible for creating, Maintaining or updating a record keeping system. By attending this programme, delegates will be able to create and maintain an effective record keeping system in a business environment. The learner will be able to use this knowledge and skill to provide advice on record keeping systems to the business they are working in.



Type of records that are used in a specific business sector.

- Different types of records used by a specific organisation or department.
- Information contained in a contract, agreement or quotation
- The purpose of maintaining a record of contracts, agreements and quotations with reference to legislative and organisational or departmental requirements.
- Importance of recording client specific details from one's own business sector or department in line with organisational requirements.
- The purpose of recording changes to contracts, agreements and quotations with reference to legislative and organisational or departmental requirements.

Record Management

COURSE OBJECTIVES

- Explain why companies record and keep information
- Describe the type of records used in a specific business sector
- Locate and provide records to users on request
- Create a record keeping system
- Maintain and update the record keeping system

Locate and provide records to users on request.

- Required records are located using correct organisational procedures.
- Requested data located, accessed and retrieved from the records.
- Confidential records given only to authorised people and confidentiality practices implemented according to company procedures.
- The record retrieval process

Create a record keeping system

- The Requirements of the organisation or department related to record keeping determined through research.
- A record keeping system created, ensuring that it is cost effective, practical and user-friendly.
- The implementation of the record keeping system monitored and recommendations made as to amendments which need to be made to aid effectiveness and efficiency of the system.

Maintain and update the record keeping system.

- The Record keeping system monitored and reviewed to comply with company or departmental standards and requirements
- The record keeping system updated to meet new developments in the organisation and/or needs of the employees.
- Problems with the record keeping system resolved using appropriate techniques or referred to outside agencies who can solve the problem.

Why companies record and keep information.

- Reason for recording information is explained
- Type of information contained in records is explained.
- Methods of creating records using different types of technology are named Keeping a record
- The importance of accurate notes.
- Managing successful meetings.
- Targeting the recipient.



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