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SAAMA2018353

Advanced Electronic Documents & Records Management Systems Workshop

"Managing Records In Support of Business Requirements"

First Event : 2nd – 4th December 2026
Second Event: 17th – 19th February 2027
Virtual On Microsoft Teams
Venue: Apollo Hotel, Randburg Johannesburg

Course Overview

The **Advanced Electronic Document and Records Management Systems (EDRMS) Workshop** is designed to provide participants with sophisticated knowledge and practical expertise in the strategic design, implementation, administration and optimisation of Electronic Document and Records Management Systems.

As organisations increasingly transition towards digital information environments, the imperative for robust records management frameworks, effective information governance and regulatory compliance has become increasingly significant. This programme offers an in-depth exploration of the principles, methodologies and best practices underpinning the successful implementation and sustainable management of EDRMS solutions, ensuring alignment with organisational priorities and strategic business objectives.

Through practical case studies, facilitated discussions and knowledge-sharing sessions, participants will critically examine contemporary challenges, implementation complexities and potential operational risks associated with EDRMS projects. Particular emphasis will be placed on identifying mitigation strategies, strengthening information management practices and leveraging technology to enhance organisational efficiency, accountability, compliance and long-term business value.

To stay updated follow, us on LinkedIn

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Our experienced facilitator



Marina Hiscock

Marina Hiscock is highly creative and innovative thinker with advanced business education, holding two degrees – an MPhil in knowledge Management and Information Philosophy, and a BA in communication and industrial psychology.

With over 25years of experience in knowledge management, records management and change management, She worked in various organizations such as petrochemical, broadcasting, logistics and supply chain management, engineering, and government(Department of Health, Department of Labor, Department of Land Reform and Rural Development), as well as universities and business schools.

She has a solid background in implementing best practices and compliance standards, bringing a wealth of experience in developing and maintaining effective recordkeeping systems. In a rapidly evolving digital landscape, she stay abreast of the latest trends and technologies in records management to bring innovative and adaptive solutions to the table. Her ability to communicate complex concepts clearly and concisely facilitates seamless collaboration with stakeholders at all levels.

As a records management professional, her mission is to empower organizations to effectively manage their information assets, fostering compliance, efficiency, and strategic decision-making.

Course Objectives:

At the end of this **Advanced Electronic Document and Records Management Systems (EDRMS) Workshop** , the participants will be able to:

- Enhance skills in securing sensitive documents and protecting data integrity.
- Establish the necessary Governance structures.
- Establish a plan for digital preservation
- Conduct an analysis of work processes that generate or capture records.
- Equip delegates to understand and prepare for managing e-mail as a record.

Organizational benefits:

- Improved compliance and audit readiness
- Enhanced operational efficiency and document accessibility
- Reduced risk associated with poor records management
- Integrated enterprise-wide information systems
- Future-ready digital records infrastructure

Training Methodology
Marina Hiscock accumulated tremendous experience of over 25years in knowledge management, records management and change management.

Who Should Attend?
- Senior Registry Officer
- Records Managers
- Departmental Managers responsible for records management
- Departmental/ Unit records coordinators
- Document Controller/ Managers
- Knowledge Manager
- Archive Managers
- Information Technology Staff/ Quality Control Specialists
- Company Secretaries / Compliance Officers/ Auditors
- Information Governance Professionals / Government Officials
- Representatives from Watchdogs Organization responsible for Industry governance
- Administrators who are developing records management systems

Targeted Competencies:

By the end of this **Advanced Electronic Document and Records Management Systems**(EDRMS) training, the participant's competencies will:
- Explain the principles, value and legal basis of records management.
- Apply the records lifecycle and continuum models to paper and electronic records.
- Design and use a file plan, classification scheme and retention schedule.
- Draft a records management improvement plan for their own organization.
- Capture, organize and maintain electronic records with proper metadata.
- Evaluate and use EDRMS, cloud and collaboration platforms in a compliant way.
- Manage email, social media, scanned and born-digital records.
- Protect records through security, access control, privacy and disaster planning.
- Plan digital preservation and lawful disposal of records.
- Assess the role of AI, automation and blockchain, and use AI verification and security marks to detect fraud and misinformation.

Course Outline:
Module 1: Introduction to Records Management
- Definitions: records, documents, information and data
- Why records matter: accountability, evidence, efficiency and memory
- Characteristics of authentic, reliable records.
- Roles and responsibilities in the organisation

Module 2: Legal and Regulatory Framework
- National archives and records legislation

- Access to information and data protection law(e.g. POPIA, GDPR)
- Electronic communications and e-evidence law
- International standards: ISO 15489, ISO 16175, ISO 30300 series

Module 3: The records lifecycle and continuum

- Creation, capture, use maintenance, retention, disposal
- Lifecycle vs continuum models
- Vital records identification

Module 4: Classification, file plans and registry practice

- Functional and subject-based file plans
- File opening, tracking, closing and transfer
- Registry procedures and mail handling
- Practical: building a file plan

Module 5: Electronic records management

- Born-digital vs digitised records
- Metadata standards and minimum metadata (ISO 23081, Dublin Core)
- File formats, naming conventions and version control
- Managing email, shared drives and instant messaging records
- Scanning and digitisation standards(resolution, OCR, quality control)

Module 6: EDRMS and modern platforms

- EDRMS functional requirements (MoReq, ISO 16175)
- Microsoft 365/ SharePoint, Google Workspace and records features
- Cloud storage: risks, contracts and data sovereignty
- Workflow automation and e-signatures
- Selecting and implementing a system: change management

Module 7: Emerging technologies, AI records verification and security marks

- Artificial intelligence: auto-classification, search and redaction
- Generative AI outputs as records
- Robotic process automation
- Blockchain for records integrity
- Social media, websites and mobile records

Fighting fraud and misinformation

- Common threats: forged certificates, altered invoices and contracts, AI-generated fake documents deepfake audio and video
- Digital signatures, PKI and hash values to prove a record has not been altered
- Security marks on printed records: visible and invisible watermarks, microtext, holograms, tamper-evident seals.
- QR codes and online verification portals linked to the authoritative record
- Content credentials and provenance (C2PA) for image, video and AI-generated content

- AI tools that detect forged, altered and synthetic documents and media
- Audit trails, chain of custody and blockchain timestamps as proof of authenticity
- Policy: Labelling AI-generated records and responding to suspected fraud or misinformation
- Practical: verify a genuine vs tampered certificate and spot a deepfake

Module 8: Security, privacy and access
- Access controls, permissions and audit trails
- Encryption, backups and cybersecurity basics
- Privacy-by-design and handling personal information
- Disaster preparedness and business continuity

Module 9: Retention, disposal and digital preservation
- Retention schedules and disposal authorities
- Secure destruction of paper and digital records
- Legal holds
- Digital preservation: format migration, emulation, OAIS model, PDF/A

Module 10: Governance, audit and action planning
- Definition of Change Management
- Importance of Change Management in Records Management
- Key Principles of Change Management
- Records management policy and procedures
- Performance measurement and records audits
- Maturity assessment
- Practical: Participants improvement plan and presentation

Material and requirements:

Participants receive
- Course manual and slide handouts
- Templates: file plan, retention schedule, records policy, records audit checklist
- Digital toolkit of standards references and checklists
- Certificate on successful completion
- One laptop per participant (or per pair) for practical sessions
- ID/ Passport Copy for issuing of CPD point certificate
- Facilitator-led presentations and discussion
- Course material
- Course fees include documentation, luncheon and refreshments for in-person learners.

Advanced Electronic Document and Records Management Systems(EDRMS) Workshop

Advanced Documents and Records Management Compliance Workshop (3CPD) points SAAMA2018353

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Please write in BLOCK CAPITALS

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Business Address: _____

_____

Vat: _____

City: _____ Postal Code: _____

_____ Fax: _____

Delegate Details:

1.First Names _____
Position: _____
Email: _____

2.First Names: _____
Position: _____
Email: _____

3.First Names: _____
Position: _____
Email: _____

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☐ Virtual ☐ In-person

Apollo Hotel, Randburg Johannesburg

Second Event : 17th – 18th February 2027

☐ Virtual ☐ In-person

Apollo Hotel, Randburg Johannesburg

Price per Delegate: R8 999.99
Virtual Price: R6 999.99

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