



Records Management for Records Managers

Course Code: 06MT0006
Format: Hands-on workshop
Duration: 2 days

Overview of Meridio Records Management

Records Management Roles

- User, groups and roles
- Privileges

Fileplan Configuration

- The disposal process
- Classes
- Electronic folders and parts
- Physical folders and parts
- Hybrid folders and parts
- Electronic records and physical markers
- Keyword hierarchies
- Security
- Utilising a Meridio fileplan through SharePoint 2003 and MOSS 2007

Fileplan Maintenance

- Class relocation and folder/record reclassification
- Scheduling
- Resolution of disposal conflicts
- Reporting
- Use of disposal holds
- Managing disclosability
- Managing physical archives

Meridio is a leading worldwide provider of enterprise Document and Records Management (eDRM) software, built for Microsoft .NET platforms. Meridio with Microsoft provides 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.

Goal

Prepare Records Managers to configure and maintain fileplans, including the modeling of physical archives, using the eDRM Web client during a hands-on workshop.

Intended Audience

- Records Managers, Local Records Officers

Required Background

- 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

Courseware Supplied

- Course notes and exercises

Meridio and Microsoft

Meridio is a Microsoft Gold Certified Partner, having demonstrated superior levels of developer certification, real-world experience and providing complete customer reference projects that were independently verified by Microsoft.



www.meridio.com

Americas
 890 Winter Street
 Suite 215
 Waltham, MA 02451
 USA
 Phone: +1 (781) 810 2200
 Fax: +1 (781) 622 3980

Europe
 The Innovation Centre
 NI Science Park
 Queen's Road, Queen's Island
 Belfast BT3 9DT
 UK
 Phone :+44 (0)28 9073 6200
 Fax: +44 (0)28 9073 6201

Asia/Pacific
 Level 11, Tower B
 Zenith Centre
 821 Pacific Highway
 Chatswood NSW 2067
 Australia
 Phone: + 61 (0) 2 8448 2011
 Fax: +61 (0) 2 8448 2010