Shri Ram College, Muzaffarnagar

Department of Business Administration

Notice

Dated-07/09/2019

All the teaching and non-teaching staff of Shri Ram College, Muzaffarnagar is hereby informed that a one-day training program named, "File Keeping and Document Management" is to be conducted by Department of Business Administration. Commencement date of the training program will be 11/09/19.

Head, Department of Business Administration

CC:

Principal
Shri Ram College, Muzaffarnagar

Co-ordinator
IQAC, Shri Ram College
Muzaffarnagar

Principal
Shri Ram College
Muzaffarnagar

<u>Report</u>

·<u>Training for file keeping and document management</u>

Dates of training program	11/09/2019	Venue of Training program	Auditorium, Shri Ram College, Muzaffarnagar

<u>Objectives</u>

- Understand records retention requirements, regulations and guidelines
- Learn how to create a system for managing desktop and active paper files
- Understand the various record management locations and how best to utilize them
- Learn how to effectively name documents for versioning, easy retrieval and access
- Gain searching strategies to find information quickly with digital tips and tricks

<u>Methodology</u>

The training was conducted in a very attractive way. The entire training session was divided in two phases.

In this Session following points were discussed: -

- ## **<u>What are the rules for creating documents?</u>**

In this training program it was discussed that all businesses create a variety of documents (Invoices, payment reminder letters, sales brochure, email, balance sheets, spreadsheets, reports etc.) in the course of doing and keeping track of business. And to keep things organized, all businesses need to establish rules for creating documents.

- Are there in-house templates for some of your standard business documents, such as letters and invoices, and where are they located?
- Is there an in-house style guide that needs to be followed?
- Should new documents be dated or time-stamped?
- What procedures should be followed for sharing or reviewing documents?

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- ## How will we store documents?

There are costs associated with storage—the largest of which, for most small businesses, is probably the cost of the time wasted when people are looking for documents. So, the question is: How will documents be filed? Through good file management practices, a clear, easy system can be developed. In this phase it is discussed that how we can archive documents without wasting time and cost.

- ## How can retrieve documents be simplified?

In this phase resource person addressed that good filing practices can go a long way toward solving the problem. If you do things such as consistently follow strict naming conventions, for example, documents will be much easier to find.

You should create a file locations list, which will remind users where particular types of files go—and where to find them. Remember to include whether or not the file will be on your computer system, an in-house server, in the cloud, or filed in a physical location such as a filing cabinet. For instance, suppose that you use images, video or even paper photos in your business. An entry in your file locations list might be:

- Digital images/video: computer (or server)—drive E:/photos—file in the appropriate subject folder
  Paper photos: filing cabinet 3—Photos—alpha by subject

Shared network or cloud drives should be labeled according to contents, as should filing cabinet drawers.

- ## How can we make and keep our documents secure?

The first line of defense for document security is physically securing the business premises themselves. All businesses, even home-based ones, need to have security systems installed.

Businesses may also need or want to invest in other security devices, such as window bars, security cameras, or patrol services. You can spend all the time you want creating passwords and encrypting files in an attempt to protect your electronic files, but it doesn't matter much if someone can just wander in and steal your computer.

Additional document security measures include:

- Locking all filing cabinets after business hours (and during lunch if no one reliable is present)

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- Backing up electronic documents regularly, preferably off-site to guard against having your business data wiped out by natural disasters.
- Restricting user access to certain documents, applications, and folders on any shared computers
- Preventing employee theft by conducting background and reference checks as a part of your hiring process

- **Implement and Follow Through**

Once you have created your document management plan by answering the questions above, you're ready to implement it. Make sure all your entire staff knows the details of your business's document management system and that everyone follows appropriate procedures when creating, storing, and retrieving documents.

You'll also have to be sure that everyone who accesses and uses documents within your organization follows through by consistently naming and storing documents appropriately. Spot check on a regular basis to test whether particular files can be easily found and to guard against misfiling. Even occasional carelessness can throw off the entire system.

Types of Participants	Teaching and Non-teaching staff
No. of participants	25
Resource person	(Dr. Saurabh Mittal)

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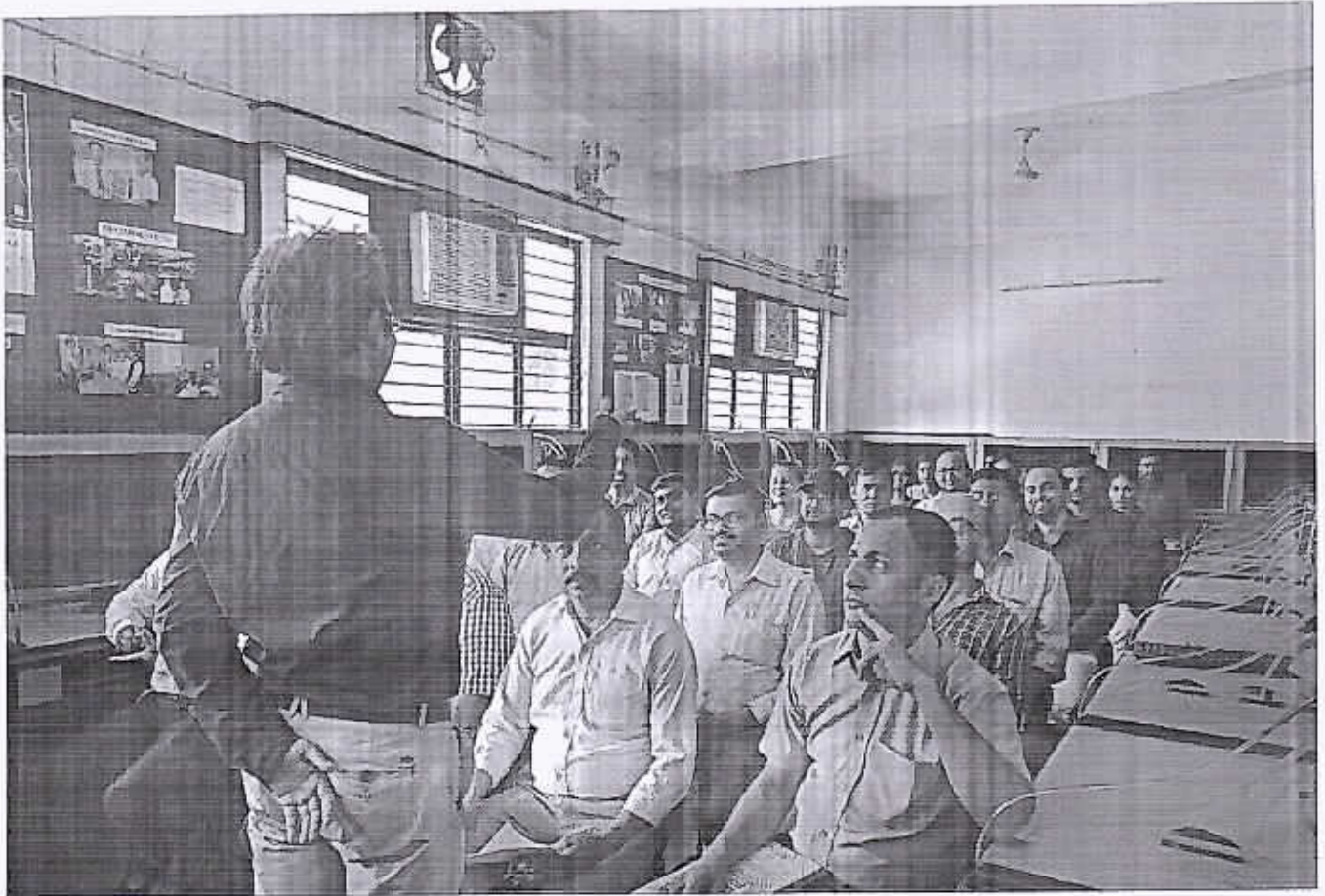# Training for file keeping and documents management
List of Paticipants
Date-11/09/19

S.No.	Name of teaching and non-teaching staff	Department	Signature
1	Dr. Saurabh Mittal	Commerce	
2	Dr. Ashwini Kumar	Bio Science	
3	Mr. Nitin Tyagi	Computer Application	
4	Dr. Amit Tyagi	Computer Application	
5	Mr. Siddhant Garg	Computer Application	
6	Ms. Rishu Jain	Computer Application	
7	Dr. Himanshu Verma	Business Administration	
8	Dr. Pankaj Kaushik	Business Administration	
9	Dr. Vivek Kumar Tyagi	Business Administration	
10	Mr. Rajeev Rawal	Business Administration	
11	Ms. Shruti Mittal	Business Administration	
12	Mr. Ajay Chauhan	Business Administration	
13	Mr. Ankur Tyagi	Business Administration	
14	Mr. Kapil Dev Dhiman	Business Administration	
15	Mr. Amit Bhatnagar	Business Administration	
16	Mr. Nand Kishore	Account Office	
17	Mr. Ashutosh	Account Office	
18	Mr. Nitin Kumar	Account Office	
19	Mr. Ajay Kumar	Account Office	
20	Mr. R.B. Singh	Account Office	
21	Dr. M.S. Khan	Commerce	
22	Mr. Mukesh Kumar	Commerce	
23	Mr. Anit Kumar	Library	
24	Mr. Rahul Tyagi	Library	
25	Ms. Namita Singhal	Library	

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