



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Tangible Collections Records Management Documentation And Retrieval Training

Culture and Arts / Cultural Studies

Unit Standard 114531 · NQF Level 4 · 16 Credits · 13 Days

COURSE OVERVIEW

This course equips learners with the skills to manage tangible collections by implementing proper documentation, classification, and retrieval systems. Participants will learn to maintain accurate records of physical assets, ensuring efficient storage, tracking, and retrieval in compliance with organisational and regulatory standards.

Category	Culture and Arts
Subfield	Cultural Studies
Unit Standard	114531
Accreditation	SAQA Accredited · NQF Level 4 · 16 Credits
Duration	13 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply principles of records management to classify and catalogue tangible collections.
- Implement documentation procedures for capturing metadata and maintaining audit trails.
- Design retrieval systems that enable efficient access to physical records.
- Evaluate storage conditions and preservation methods to ensure collection integrity.
- Demonstrate compliance with legal and organisational requirements for records retention and disposal.

WHO SHOULD ATTEND

- Records managers, archivists, librarians, and administrative staff responsible for managing physical collections such as documents, artefacts, or library materials in corporate, government, or heritage institutions.

COURSE OUTLINE

Day 1: Introduction to Tangible Collections Records Management

- Overview of tangible collections: types and contexts.
- Role of records management in heritage, museums, and archives.
- South African legislative framework: National Heritage Resources Act, Promotion of Access to Information Act.
- Key concepts: records, metadata, provenance, custody.
- The records lifecycle: creation, use, maintenance, disposal.

Day 2: Documentation Standards and Principles

- International standards: Dublin Core, CIDOC-CRM, SPECTRUM.
- South African best practices for collection documentation.
- Metadata elements for tangible objects.
- Creating and using documentation templates.
- Practical exercise: documenting a sample object.

Day 3: Cataloguing and Inventory Management

- Cataloguing principles: uniqueness, consistency, clarity.
- Inventory management systems and registers.
- Classification systems: hierarchical, faceted, numeric.
- Numbering conventions: accession numbers, barcodes, RFID.
- Practical: cataloguing multiple objects.

Day 4: Condition Reporting and Preservation Documentation

- Condition reporting standards and forms.
- Assessing physical state: damage, deterioration, stability.
- Preservation documentation: treatments, conservation records.
- Environmental monitoring: temperature, humidity, light.
- Linking condition data to cataloguing records.

Day 5: Acquisition and Accessioning Documentation

- Acquisition policies and procedures.
- Provenance research and documentation.
- Accessioning steps: numbering, recording, storage.
- Legal documents: deeds of gift, loan agreements, invoices.
- Ethical considerations: cultural sensitivity, repatriation.

Day 6: Deaccessioning and Disposal Documentation

- Deaccessioning policies and criteria.
- Documentation of disposal decisions and approvals.
- Transfer records: to other institutions, sale, or destruction.
- Ethical and legal implications.
- Case studies of deaccessioning processes.

Day 7: Retrieval Systems and Search Strategies

- Retrieval system types: manual, digital, hybrid.
- Indexing principles and thesauri.
- Controlled vocabularies: Art & Architecture Thesaurus, local lists.
- Search strategies: keyword, Boolean, faceted.

- Practical: searching a sample database.

Day 8: Database Management for Collections Records

- Overview of collection management systems (e.g., PastPerfect, Mimsy).
- Database design: tables, fields, relationships.
- Data entry standards and validation.
- Data migration: planning, mapping, testing.
- Backup and security protocols.

Day 9: Digital Records and Digitisation Documentation

- Digitisation planning and workflows.
- File formats, naming conventions, and storage.
- Digital metadata: technical, preservation, rights.
- Digital preservation strategies: migration, emulation.
- Practical: documenting a digitisation project.

Day 10: Access and Use Documentation

- Access policies: open, restricted, confidential.
- Rights management: copyright, cultural rights, licenses.
- Reproduction requests and documentation.
- Loan documentation: incoming, outgoing, conditions.
- POPIA compliance in collections records.

Day 11: Records Retention, Disposal, and Archiving

- Retention schedules: legal, administrative, historical value.
- Disposal methods: destruction, deletion, transfer.
- Archival standards for records transfer.
- Digital preservation repositories.
- Practical: creating a retention schedule.

Day 12: Auditing and Quality Assurance of Records

- Audit types: completeness, accuracy, consistency.
- Sampling methods for record checking.
- Quality assurance frameworks.
- Corrective actions and updates.
- Reporting and documentation of audits.

Day 13: Integration, Best Practices, and Final Assessment

- System integration: linking documentation, retrieval, preservation.
- Best practice case studies from South African institutions.
- Emerging trends: AI, linked data, crowdsourcing.
- Personal action plan development.
- Final practical assessment: document and retrieve a collection item.

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **16 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 43,500.00	R 43,500.00
1	In-House	R 56,600.00	R 56,600.00
1	On-Campus (Pretoria)	R 65,200.00	R 65,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	26 Aug 2026	On-Campus	Cape Town, South Africa
11 Aug 2026	27 Aug 2026	On-Campus	Dubai, UAE
12 Aug 2026	28 Aug 2026	On-Campus	Pretoria, South Africa
13 Aug 2026	31 Aug 2026	On-Campus	Abu Dhabi, UAE
14 Aug 2026	01 Sep 2026	On-Campus	Durban, South Africa
14 Aug 2026	01 Sep 2026	On-Campus	Mauritius
17 Aug 2026	02 Sep 2026	On-Campus	Harare, Zimbabwe
17 Aug 2026	02 Sep 2026	On-Campus	Dubai, UAE

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

- 1. Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 114531) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
- 2. Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
- 3. Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
- 4. Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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