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| IBM Enterprise Records 5.1: File Plan Design | F181  Course Abstract |

For more info: <https://www-03.ibm.com/services/learning/ites.wss/zz-en?pageType=page&c=a0011023>

# Course description

This course is for those whose job includes responsibility for designing the file plan for an IBM Enterprise Records system and making decisions regarding record retention, disposition, and security. You use the IBM Enterprise Records web application to create the file plan. You work with a records administrator, an installer, a database administrator, and a programmer. You must be able to organize and communicate records management system requirements to the other roles.

You work with a fully functioning IBM Enterprise Records system to practice the skills required for designing file plans for records management.

# Duration

1 Day

# Delivery Method

ILT, ILO and SPVC

# Audience

* Anyone who is responsible for planning the records management strategy for their organization that uses IBM Enterprise Records.

# Prerequisites

* F141G - IBM FileNet P8 5.0: Prerequisite Skills using Workplace XT
* F178G - IBM Enterprise Records 5.1: Core Skills

# Course Objectives

* Acquire the knowledge and skills necessary to design a functional and efficient records management file plan and coordinate its development and deployment.

# Topics

**IBM Enterprise Records 5.1: File Plan Design**

Coordinate file plan development

Records management system coordination Roles and responsibilities

Plan the records management system Design the records management system Build the system

Deploy the file plan

File plan development and deployment

Core file plan design concepts Course example information Aggregation: a quick review

Case study: 5 years of record-level aggregation Why use container-level aggregation?

Record-level aggregated sweep process Container-level aggregated sweep process Alternatives to record-level aggregation Plan Disposition Sweep around the file plan Automatic destruction

Create a functional classification file plan Approaches to file plan design Functional classification scheme

Example of a functional classification scheme Advantages of functional classification Category names and IDs

Steps to creating the file plan Create a retention model file plan What is the retention model?

Retention model structure

Automatic Volume Creation workflow Retention model example

When to use the retention model Automation

Choose the cutoff base Record year model Delayed aggregation model

Create a case model file plan What is the case model?

Case model structure Optimize the case model Cutoff triggers