

City of Milwaukee Upcoming Training

9/23/24

<u>Class</u>	<u>Trainer</u>	<u>Date</u>	<u>Time</u>	<u>Online or In Person</u>
Managing Records with Gimmel Physical	Bradley Houston, City Records Office	Wednesday, October 9 th	11:00 am – 12:00 pm	Virtual
Procard Training	Delisha Moore, Procurement Manager	Wednesday, October 16 th	10:00 am - 11:00 am	Virtual
Electronic Records Management in E-Vault and Beyond	Bradley Houston, City Records Office	Wednesday, October 23 rd	11:00 am - 12:00 pm	Virtual
Procard Training	Delisha Moore, Procurement Manager	Wednesday, November 20 th	2:00 pm – 3:00 pm	Virtual
Procard Training	Delisha Moore, Procurement Manager	Wednesday, December 18 th	10:00 am – 11:00 am	Virtual

To Register for Records Training

<https://forms.office.com/g/xkHa0WpuZn>

To Register for Procard Training email

dmoore@milwaukee.gov

Managing Records with Gimmel Physical (Wednesday, October 9, 11:00-12:00)

The City Records Center is using Gimmel Physical to manage its collection of over 20,000 boxes of semi-active and inactive records. If your department is storing records with City Records, you can use it to manage your records too! In this workshop, you will learn how to view your inventory stored at CRC, search for and request specific boxes and records, view information about departmental and global retention schedules, pre-enter boxes and files into the system for transfer to CRC custody, review boxes scheduled for destruction, and even keep track of boxes and electronic records stored in your office! We will walk through common use cases and answer questions you have about managing records in the Gimmel Physical System. **Please note that the interface has changed since this workshop was last offered, so previous attendees may still find this workshop useful.**

City of Milwaukee Upcoming Training

9/23/24

This session is primarily intended for department or division records coordinators, but any employee who regularly sends or requests records to/from the City Records Center is also encouraged to attend. Records Coordinators should already have accounts configured for Single Sign-On at <https://gimmel.milwaukee.gov/> ; if you do not have an account but wish to participate in the session, please email recmgr@milwaukee.gov by no later than **Wednesday, October 2** so we have time to provision your account and add you to the appropriate security groups.

Electronic Records Management in E-Vault and Beyond (Wednesday, October 23, 11:00-12:00)

Most users of E-Vault are viewing document images scanned by City Records Center staff for reference use, but an increasing number of departments are also using the software for storing and managing authentic copies of born-digital public records. In cases where records are intended to be available to the public, departments are storing records at the Milwaukee Municipal Research Center Digital Archive, <https://milwaukeeemrc.starter1ua.preservica.com/>. Could your department make use of one of these solutions? Find out at this advanced-level E-Vault workshop, which will use the FileDirector/Efalia desktop client to show some of the extended capabilities of the system, followed by a brief look at depositing public-facing records for long-term preservation in the City's Preservica client. We'll also discuss ways to make it easier for you to get significant public records from your space to one of these repositories in a secure, easy manner.

This is an advanced session and assumes existing facility in using FileDirector to locate and view documents. The FileDirector desktop client and component service must be installed on your workstation to take advantage of most of these features; the session is therefore intended as a showcase/demo rather than as interactive training, although employees already using the desktop client are welcome to follow along.