Document Control and Records Management

Why Attend

- This course provides a strong understanding of the concepts of Document Control and Records Management and develops the requirements to help Document Controllers, Records Managers and other staff improve the control of critical documents across the organization. Using best practice and time-proven methodologies and techniques, the course enables participants to understand and implement key document control methods and improvement plans, and to understand the impact of wider information management issues and challenges.

Course Methodology

- This course uses a combination of presentations, group discussions, case studies and exercises based on real life situations.

Course Objectives

By the end of the course, participants will be able to:

- Explain how Document Control and Records Management fits within the business objectives and environment of their organizations.
- Apply key Document Control and Records Management concepts and techniques to organizing and managing documents and records.
- Describe the most common reasons for poor document control, and how to improve the process.
- Explain the process of planning and implementing a Document Control Records Management (DCRM) solution.
- Apply best practice, yet key standards to Document Control and Records Management.

Target Audience

- This course is designed for anyone from administration to management, with full or some responsibility, at a corporate and operational level, for document and records management, document control, compliance and information governance.

Target Competencies

- Risk analysis
- Document process analysis
- Knowledge of relevant standards
- Document identification
- Managing document registers

Foundations of Document Control

- Understanding document control fundamentals
- Analyzing standards related to document control
- Identifying the important elements of document control
- Managing deliverables for your projects
- Document identification
- Document types
- Templates
- Transmittals

Implementing Document Control

- Ensuring quality
- Quality standards
- Procedures and specifications
- Roles and responsibilities
- Document distribution
- Document control systems

Records Management Techniques

- Records management lifecycle
- Capture
- Classification
- Metadata
- Collaboration
- Searching
- Retention, Archiving and Disposal

Planning for Document Control and Records Management

- Drivers for document control and records management
- Standards and guidance
- Regulations
- The business case
- Risk analysis

Implementing Document Control and Records Management

- Designing a DCRM solution
- Requirements for a solution
- Selecting and implementing a DCRM system
- Migration
- Business as usual