



Consulting and Training | Reach New Heights

Course Name

Document Control and Records Management

Sector Name

Administration and Office Efficiency

Document Type

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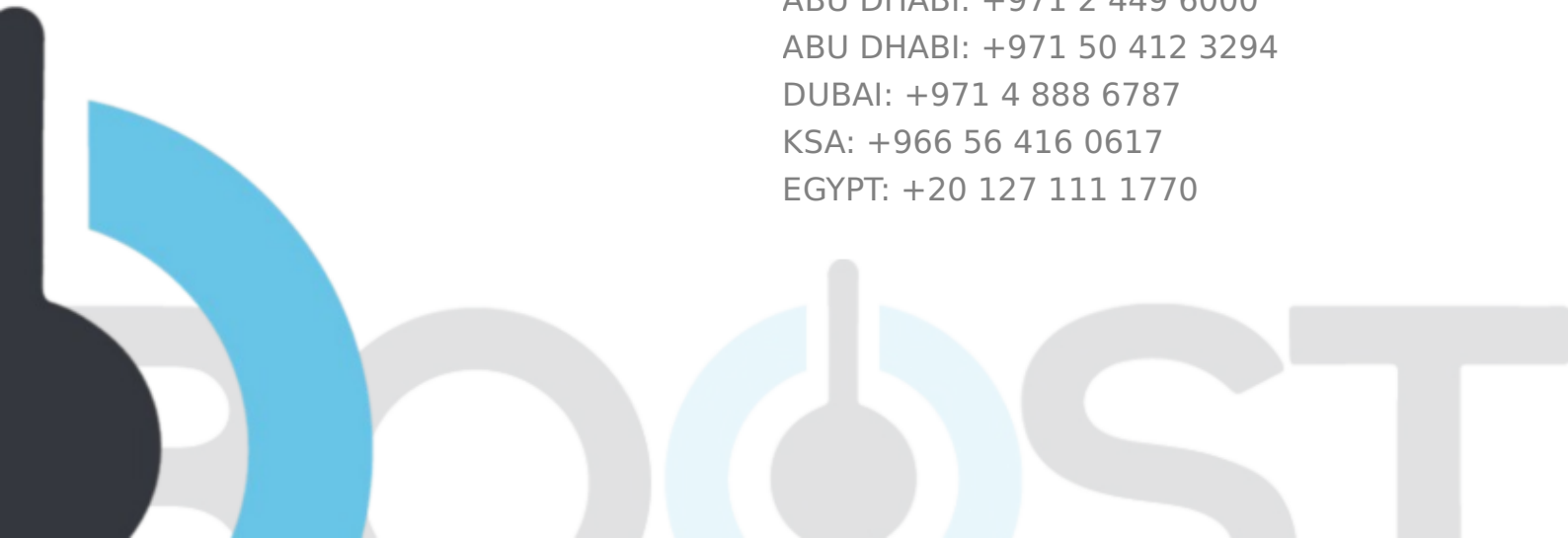
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Document Control and Records Management

Course Introduction

The increasing volume of paper and electronic (digital) documents, records, knowledge, and content can be difficult. Electronic information is under threat from cyber-attacks and personal information is at risk of exposure. As such, the development and implementation of a records management program that includes document control methods to identify, secure, and protect critical information is necessary for every organization.

This training course is designed to help participants develop the systems of records management and document control that an organization needs. By the end, each participant will have a plan of action as well as the necessary skills to assist with the development and implementation of an appropriate program for managing their organization's documents, records, and information.

Methodology

The training program is implemented by combining the participants' academic knowledge and practical practice **(30% theoretical / 70% practical activities)**.

At the end of the training program, each participant presents a presentation of the training project during a training session (20

minutes for each participant), showing their skills in applying what they were trained on and the extent of their mastery in the actual practice of the training activity as a professional trainer. The evaluation is based on six approved criteria. A detailed report is submitted to each participant and the training department in your organization on the results of the participant's performance and the return on training. This program focuses on exercises, case studies, and individual and group presentations.

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Target Audience

- ✓ Office managers.
- ✓ Executive secretaries.
- ✓ Administrators and assistants.

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Learning Objectives

- ✓ Develop a records management program to enhance the value of the organization's information and reduce risk and cost
- ✓ Understand the key concepts and overall scope of ISO 15489 and ISO 27001, and how to apply them in your organization
- ✓ Develop document control methods to identify, secure, protect, and retain critical information
- ✓ Explore the implications of an Enterprise Content Management (ECM) strategy
- ✓ Apply regulations and standards to the management of information for compliance
- ✓ Identify risks associated with poor management of information to reduce penalties and costs
- ✓ Develop an information asset register to identify critical information within their organization

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Document Control and Records Management

Course Outline

✓ 01 Day One

The strategy and understanding principles of managing information

- ✓ Introduce Document and Records Management
- ✓ The organization: How your information is managed today
- ✓ Definitions: Understanding what the information terms mean
- ✓ Document control and records management: Similarities and differences
- ✓ Document and Records Management Strategies
- ✓ Your organization
- ✓ Identifying its type
- ✓ Identifying its staff
- ✓ Identifying its information
- ✓ Defining information goals for the organization
- ✓ How to achieve information goals

Document control and records management, Concepts and Set up Components program development process

- ✓ Business case
- ✓ Defining the purpose
- ✓ What to include
- ✓ Objectives of the case
- ✓ Document Control specifics
- ✓ Records Management specifics
- ✓ Records review

- ✓ Metadata and Indexing
- ✓ Identification of documents and records
- ✓ Critical information, documents, and records
- ✓ Electronic and physical formats
- ✓ Storing records

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Course Outline

✓ 02 Day Two

Characteristics of a document control and records management program

- ✓ File plans
- ✓ Challenges and problems
- ✓ Classification of records
- ✓ Retention and disposition
- ✓ Laws, regulations, standards, and business requirements
- ✓ Developing a retention schedule
- ✓ Privacy and protection
- ✓ Transparency
- ✓ Integrity
- ✓ Security
- ✓ Business, historical, and preservation archives
- ✓ People, responsibilities, and information awareness
- ✓ Psychology of filing
- ✓ Accountability
- ✓ Communication and collaboration
- ✓ Creating the information management message
- ✓ Knowledge transfer
- ✓ Developing the education package
- ✓ Sponsorship and guidance from senior management
- ✓ Information Gathering: audit and survey

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Course Outline

✓ 03 Day Three

Planning and action

- ✓ Information management strategy
- ✓ Development of a plan to deliver document and records management
- ✓ Policy and guidance writing
- ✓ Information asset register
- ✓ Document control and records management process plans

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Course Outline

✓ **04 Day Four**

Change management

- ✓ Designing, Implementing, and Administering Specialized Systems for Managing Records
- ✓ Integrating Records Management into Business Systems and Processes

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Course Outline

✓ 05 Day Five

Risk and recovery: Disaster prevention and continuity planning

- ✓ Education program
- ✓ Creating an action plan

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
May 24, 2027	May 28, 2027	5 days	2150.00 \$	Virtual , Online
Sept. 21, 2026	Sept. 25, 2026	5 days	4950.00 \$	England , London
Dec. 14, 2026	Dec. 18, 2026	5 days	4250.00 \$	UAE , Dubai
Jan. 11, 2027	Jan. 15, 2027	5 days	4250.00 \$	UAE , Dubai

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