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Course Name

Documents and Records Management Compliance

Sector Name

Administration and Office Efficiency

Document Type

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Documents and Records Management Compliance

Course Introduction

Document and records management is essential for organizations as it ensures compliance with regulations, facilitates easy retrieval of information, preserves valuable knowledge, promotes accountability and transparency, mitigates risks, enhances efficiency and productivity, safeguards sensitive data, enables collaboration, and improves overall organizational effectiveness.

This training course is designed to provide participants with the essential strategies, tools, and technologies used to capture, categorize, manage, store, preserve (archive), and deliver documents and records in support of business processes. It also covers the key components of ISO 15489, enabling organizations to comply with best practices.

Training Course Methodology

The training course is designed to be interactive and participatory, and includes various learning tools to enable the participants to operate effectively and efficiently in a multifunctional environment. The course will use lectures and presentations, exercises, experiential and exposure to real world problems and policy choices confronting delegates.

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Target Audience

✓ Office managers.

✓ Executive secretaries.

✓ Administrators and assistants.

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Documents and Records Management Compliance

Learning Objectives

- ✓ Gain an understanding of the document and records management lifecycle.
- ✓ Familiarize oneself with the ISO 15489 records management standard.
- ✓ Explore the process of implementing a records management system based on ISO 15489.
- ✓ Assist in creating a business case and requirements for selecting and procuring document and records management solutions.
- ✓ Develop a document and records management plan of action for implementation in your organization, drawing insights from best practice implementations and case studies.
- ✓ Master the concepts related to managing information and content, including workflow, business processes, and collaboration.
- ✓ Establish search and retrieval capabilities for the documents and records management.
- ✓ Effectively set up access controls and security measures.

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Documents and Records Management Compliance

Course Outline

✓ 01 Day One

Gain an understanding of the document and records management lifecycle.

- ✓ Familiarize oneself with the ISO 15489 records management standard.
- ✓ Explore the process of implementing a records management system based on ISO 15489.
- ✓ Assist in creating a business case and requirements for selecting and procuring document and records management solutions.
- ✓ Develop a document and records management plan of action for implementation in your organization, drawing insights from best practice implementations and case studies.
- ✓ Master the concepts related to managing information and content, including workflow, business processes, and collaboration.
- ✓ Establish search and retrieval capabilities for the documents and records management.
- ✓ Effectively set up access controls and security measures.

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Course Outline

✓ 02 Day Two

Concepts and Set Up Components

- ✓ Understanding the lifecycle of documents and records.
- ✓ Capturing and managing storage.
- ✓ Storage and handling considerations.
- ✓ Preservation and archiving techniques.
- ✓ Utilizing metadata and indexing.
- ✓ Implementing classification schemes.
- ✓ Effective search and retrieval methods.
- ✓ Establishing controls and ensuring security.
- ✓ Complying with legislation, standards, and regulations.

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Course Outline

✓ 03 Day Three

Process And Delivery

- ✓ Conducting information gathering through audits and surveys.
- ✓ Building a business case.
- ✓ Identifying business requirements.
- ✓ In-depth exploration of ISO 15489 Part 1, including:
- ✓ Setting ISO 15489 policies and standards.
- ✓ Assigning responsibilities and authorities.
- ✓ Establishing procedures and guidelines.
- ✓ Developing a business classification scheme.
- ✓ Understanding IT infrastructure requirements.
- ✓ Implementing a model office and rollout plan.

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Course Outline

✓ 04 Day Four

Implementation Planning

- ✓ Planning the implementation process.
- ✓ Detailed examination of ISO 15489 Part 2, covering:
- ✓ Designing, implementing, and administering specialized systems for records management.
- ✓ Integrating records management into business systems and processes.
- ✓ Conducting information audits to monitor compliance.
- ✓ Project and program planning.

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Course Outline

✓ 05 Day Five

Implementation Planning

- ✓ Planning the implementation process.
- ✓ Detailed examination of ISO 15489 Part 2, covering:
- ✓ Designing, implementing, and administering specialized systems for records management.
- ✓ Integrating records management into business systems and processes.
- ✓ Conducting information audits to monitor compliance.
- ✓ Project and program planning.

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 28, 2026	Jan. 1, 2027	5 days	4250.00 $	UAE , Dubai
June 6, 2027	June 10, 2027	5 days	4250.00 $	KSA , Dammam
Aug. 30, 2027	Sept. 3, 2027	5 days	4250.00 $	UAE , Dubai
Jan. 11, 2027	Jan. 15, 2027	5 days	5950.00 $	switzerland , Geneva

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