Document Control and Records Management
Why Attend
This 5-day course is a combination of the two back-to-back courses: Document Control (2 days) and Records Management (3 days)

Records management today is a combination of many subjects, including retention, security, privacy and governance of both data and information. It is the customer/user-facing side of managing information and is truly a change management and people (education) issue. With the introduction of new technology that enables us to communicate in many different and innovative ways, it is more important than ever that the documents, data and information contained in your organization are properly managed. Many documents may need to be retained long after you have left the organization, and in some cases more than 50 years. Managing data throughout its life relies on effective people, processes and technology.

This course is delivered through a 4-element framework that defines the purpose of document control and records management; discovers the rules that the work has to abide by; develops different methods and processes using new and existing technology; and delivers education and learning to co-workers and to those who will be responsible for ensuring that the documents are maintained throughout their life.

Course Methodology
This course is highly interactive and utilizes methodology including group discussions, case studies, videos, participant presentations and problem solving scenarios.

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

- Define the purpose behind document control and identify the goals for the document control processes and/or systems
- Define the purpose behind their records management program and identify deliverable goals for the organization
- Discover how to recognize both internal and external rules relating to document control and follow them in order to provide low risk and compliant processes
- Discover how to recognize risks and information management issues within the organization and understand how to bridge the gaps to provide low risk and compliant processes
- Develop different methods and processes using new and existing technology for managing document control data and information to help with change and understanding of the new ways of working
- Deliver document control and records management through education and learning among colleagues in order to achieve their organizations’ goals

Target Audience
This course is designed for professionals who are involved in any aspect of document control but have limited experience, as well as those involved in any aspect of records management and have ~2 or more years of experience. This includes document controllers, records managers, office managers, technicians, IT support professionals, in-house counsel, privacy officers, information security and protection managers, litigation and discovery staff, compliance officers, internal auditors, IT and enterprise content management professionals, and administrative assistants and supervisors.

The course is specifically designed to support activities across all types and sizes of organizations and sectors working locally and internationally.

Target Competencies
- Document control
- Information management
- Information asset identification
- Business case development
- Records management

Course Outline
- Document Control Introduction and Definition – Purpose and goals
  - San Bruno case study
  - Definition of document control
Document control in different types of organizations
- The reasons you need to control documents
- The goals you have for your document control process

**Document Control Discovery – Risks and Rules**
- The types of documents you control
- Documents coming from vendors and suppliers
- Rules, regulations, and risks
- Standards and specifications

**Document Control Development – Processes, Policies and Retention**
- Processes and systems to control documents
- Managing conflict with enterprise business policies
- The length of time you need to keep documents, data and information

**Document Control Delivery – Educating for the Future**
- Educating your co-workers and helping them understand document control
- Audit and compliance
- What the future holds

**Records Management Definition – Purpose and goals**
- Definition of records management
- Where it fits within the information governance framework
- Enterprise goals for managing data and information
- Matching goals to purpose and business strategy

**Records Management Discovery – Risks and Rules**
- What you have and why you have it
- How information is used in the organization
- Identifying the risks

**Records Management Development – Principles and Policies**
- Managing digital data and information with paper records
- Creating the “dReaM” team to govern the records management processes
- Accessibility, availability, and retention of information
- Protection, security and sharing of information

**Records Management Delivery – People and Educating for the Future**
- Accountability – working with the business units to deliver governance
- Compliance and audit
- Technology and what the future holds
Fees: US$ (including coffee breaks and a buffet lunch daily)

Per participant - 2020: US$ 4900

Fees + VAT as applicable: UAE Tax Registration Number 100239834300003

For Companies that want to maximize the return on their investment in training: Register 3 participants on the same course and date and pay only for 2.
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