Certified Courses

Professional Certificate

Documents and Records Management Compliance

INTRODUCTION

- Managing an ever increasing volume of paper and electronic (digital) documents, records, knowledge and content can be very difficult. How do you best capture, manage and store the documents and records in your organisation? How can records management ISO 15489 and information security ISO 27001 help? Does your approach meet compliance requirements, security, regulations and standards? What is the best way to manage emails, web pages and electronic documents and paper records? How do you find the right documents and records when you need them? How does workflow and business process management work with documents and records management to help increase efficiency within your company? ISO 15489 is the international standard for records management. It is about attaining a records management benchmark of best practice, setting up methodology, processes and the resulting data storage and using an electronic records management system.

- This Documents and Records Management Compliance training course covers the strategies, tools, and technologies used to capture, categorise, manage, store, preserve (archive), and deliver documents and records in support of business processes. This training course also covers the core components of ISO 15489 so that organisations become compliant with best practices.

Participants will develop the following competencies:

- Understand the key concepts and overall architectural scope
- Develop business cases and business requirements
- Use the concepts of document and records management to deliver business drivers
- Link how document and records management can be implemented across your organisation
- Explore the implications of an Enterprise Content Management (ECM) strategy in conjunction with document and records management
- Understand the key concepts and overall scope of ISO 15489 and ISO 27001 and how to apply in your organization

PROGRAMME OBJECTIVES

- To understand document and records management lifecycle
- To understand ISO 15489 records management standard
- Review how to implement a records management system based on ISO 15489
- Help create business case and requirements for the selection and procurement of document and records management
- Create a document and records management plan of action to implement in their organization and learn from best practice implementations and case studies
- Concepts for managing information and content, such workflow, business process and collaboration
- Review industry leading solutions and vendors in this marketplace
- Using metadata, business classification scheme, taxonomy and setting retention plans
- Learn about legislation, standards and regulation
- Set up search and retrieval
- Setting up access controls and security
- Develop storage models, audit trail and storage technologies

WHO SHOULD ATTEND?

- Professionals and leaders who wish to learn more about document management strategies for improving organisational efficiency
- Personnel moving into leadership roles to embrace better controls for managing paper and electronic documents
- Information Security Professionals
- Document Controllers and Administrators
- Document and Records Management Personnel
- Document Management Supervisors
- Suppliers, Solution Providers and Vendors
- Executives
- Users of Document and Records Management
- Personnel seeking to enhance their skills
- IT Management
- Technical Staff

TRAINING METHODOLOGY

- This training course covers essential skills such as communicating persuasively and with impact, confidence to handle challenging situations and flexibility to adapt and being clear about who you are and who you want to be. This allows you to develop deeper relationships with those around you. This is crucial towards inspiring team members to achieve organizational goals and influencing individuals to support the team direction.
- Participants will learn by active participation during the training course through the use of a wide variety of instructional techniques. There will be group exercises to allow for a "hands on" approach to learning. Case studies will be utilized to present "best practices" approaches. In addition there will be in depth discussion of critical success factors.

PROGRAMME SUMMARY

- This training course covers all the essential skills needed to understand, use and apply document and records management and all the essential skills needed to understand, use and apply ISO 15489 records management standard and ISO27001 information security. There will be discussions on the use of software, best practice implementation as well as applying all the key concepts. This training course will concentrate on the skills required to effectively deploy and maximise the benefit of document and records management as well as manage the outcomes and deliver business benefits. All participants will return to their organizations with a detailed understanding and have developed action plans to implement document and records management successfully in their organisations.

PROGRAM OUTLINE

Strategy and Understanding Key Elements of Documents & Records Management Compliance

- Introduce Document and Records Management
- ISO 15489 Part 1 and Part 2 overview
- Business Case and Drivers
- Business requirements for Managing Document and Records
- Managing Information as an Asset
- Understanding the Terminology
- Document and Records Management Strategies
- Information Governance

Concepts and Set up Components

- Document and Records Lifecycle
- Capture and Storage Management
- Storage and Handling
- Preservation and Archiving
- Metadata and Indexing
- Classification Schemes
- Searching and Retrieving
- Controls and Security
- Legislation, Standards and Regulation

Process and Delivery

- Information Gathering: audit and survey
- Building a Business Case
- Business Requirements
- ISO 15489 Part 1
- How to set ISO 15489 Policies and Standards
- Assigning Responsibilities and Authorities
- Establishing Procedures and Guidelines
- Business Classification Scheme

Implementation Planning

- Implementation Planning
- ISO 15489 Part 2
- Designing, Implementing and Administering Specialized Systems for Managing Records
- Integrating Records Management into Business Systems and Processes
- Information Audit: monitoring compliance
- Project and Programme Planning

Case Studies

- Introduction to Case Studies
- Group 1 – Strategy: Developing a Business Case
- Group 2 – Concepts: Training and Awareness Programme
- Group 3 – Process: Developing Policy and Standards

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