

Documents and Records Management Compliance Training

Description

Introduction

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Managing documents, records and content can be difficult. How do you best capture, manage and store the documents and records in your organisation? Does your approach meet compliance requirements, regulations and standards? What is the best way to manage emails, web pages and electronic documents and 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 programme 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 programme also covers the core components of ISO 15489 so that organisations become compliant with best practices.
In this programme you will learn how to:

- 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 how to apply ISO 15489 in your organisation

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
- Lean about legislation, standards and regulation
- Set up search and retrieval
- Setting up access controls and security
- Develop storage models, audit trail and storage technologies

Content

Day One

Strategy and understanding key elements of Documents & Records Management Compliance

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- 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

Day Two

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

Day Three

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
- IT infrastructure details
- Model office and rollout

Day Four

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

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Day Five

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