BLACKBIRD FOR TRAINING

Archiving & Documentation Management

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Lisbon (Portugal)

UK Traininig
PARTNER



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Archiving & Documentation Management

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Introduction

Effective Archiving & Documentation Management is essential for organizations seeking to maintain information integrity, regulatory compliance, operational efficiency, and institutional knowledge. In today's business environment, organizations generate large volumes of documents, records, contracts, correspondence, reports, technical files, and digital information that must be properly controlled, stored, retrieved, protected, and retained throughout their lifecycle.

A structured documentation and archiving system enables organizations to improve information accessibility, support decision-making, reduce operational risks, enhance compliance, and ensure business continuity. Poor document management practices can result in information loss, duplication, security breaches, audit findings, regulatory penalties, and inefficiencies that impact organizational performance.

This course provides participants with a comprehensive understanding of documentation control, records management, document lifecycle management, archiving systems, classification methodologies, retention schedules, digital records management, and governance requirements. Participants will learn how to design, implement, maintain, and improve documentation and archiving systems that support organizational objectives and compliance requirements.

The program combines international best practices, records management principles, digital transformation concepts, and practical applications to help participants effectively manage both physical and electronic records throughout their lifecycle.

Course Objectives

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



- Understand the principles of archiving and documentation management.
- Develop effective document control systems.
- Apply records management best practices.
- Design document classification and indexing structures.
- Manage document lifecycle processes.
- Establish document retention and disposal schedules.
- Improve document retrieval and accessibility.
- Implement digital archiving and electronic document management systems.
- Strengthen information governance and compliance practices.
- Protect confidential and sensitive information.
- Manage document version control and change management.
- Support audit, legal, and regulatory requirements.
- Improve records security and access control.
- Enhance organizational knowledge management.
- Develop integrated archiving and documentation frameworks.

Course Outlines

Day 1: Fundamentals of Archiving and Documentation Management

- Introduction to records and document management.
- Importance of documentation in organizational operations.
- Principles of archiving and information management.
- Types of organizational records and documents.
- Records management standards and frameworks.
- Roles and responsibilities in document control.
- Challenges in modern document management.
- Overview of document lifecycle management.

Day 2: Document Control Systems and Governance

- Document control principles.
- Establishing document control procedures.
- Document numbering systems.
- Version control methodologies.
- Approval workflows and authorization processes.
- Document review and revision management.
- Governance requirements for documentation.
- Documentation policies and procedures.



Day 3: Records Classification and Indexing

- Records classification methodologies.
- File plan development.
- Taxonomy and metadata concepts.
- Indexing systems and retrieval techniques.
- Organizing physical and electronic records.
- Information categorization frameworks.
- Classification exercises and case studies.
- Improving search and retrieval efficiency.

Day 4: Document Lifecycle Management

- Creation and capture of records.
- Registration and distribution processes.
- Active and inactive records management.
- Storage and maintenance requirements.
- Retention scheduling principles.
- Records disposition procedures.
- Lifecycle monitoring techniques.
- Documentation quality management.

Day 5: Archiving Systems and Storage Management

- Physical archiving systems.
- Electronic archiving systems.
- Storage infrastructure requirements.
- Offsite storage and backup strategies.
- Digital repository management.
- Long-term preservation techniques.
- Archiving technologies and tools.
- Storage risk management.

Day 6: Electronic Document Management Systems EDMS

- Introduction to EDMS platforms.
- Digital transformation in records management.
- Electronic records lifecycle management.
- Workflow automation concepts.
- Document tracking and monitoring.
- Integration with business systems.
- Cloud-based document management.
- Best practices for electronic records.



Day 7: Compliance, Audit and Regulatory Requirements

- Regulatory compliance requirements.
- Legal considerations in records management.
- Audit readiness and documentation controls.
- Information governance frameworks.
- Compliance monitoring processes.
- Managing audit trails and evidence.
- Regulatory retention requirements.
- Documentation compliance assessments.

Day 8: Information Security and Confidentiality Management

- Information security principles.
- Confidential records management.
- Access control frameworks.
- Data privacy requirements.
- Secure storage practices.
- Records protection strategies.
- Managing sensitive and restricted information.
- Incident response and information breaches.

Day 9: Business Continuity and Knowledge Management

- Records management for business continuity.
- Disaster recovery planning for archives.
- Backup and recovery strategies.
- Preservation of institutional knowledge.
- Knowledge transfer methodologies.
- Continuity planning for documentation systems.
- Risk management in archives operations.
- Lessons learned and knowledge retention.

Day 10: Integrated Documentation and Archiving Management

- Developing integrated records management frameworks.
- Performance measurement and KPIs.
- Continuous improvement strategies.
- Documentation audits and reviews.
- Archiving project implementation planning.
- Digital transformation roadmap.
- Case studies and practical applications.
- Final integrated documentation management project.



Why Attend This Course: Wins & Losses!

- Develop comprehensive document and records management capabilities.
- Improve organizational information accessibility and control.
- Strengthen compliance with legal and regulatory requirements.
- Enhance document retrieval efficiency and productivity.
- Improve records security and confidentiality management.
- Reduce risks associated with information loss.
- Strengthen audit readiness and documentation governance.
- Support digital transformation initiatives.
- Improve business continuity and knowledge preservation.
- Enhance document lifecycle management practices.
- Establish effective archiving and retention frameworks.
- Apply international best practices in documentation management.

Conclusion

Archiving & Documentation Management has evolved from a purely administrative function into a strategic organizational capability that supports governance, compliance, operational efficiency, business continuity, and knowledge preservation. Organizations that implement structured documentation and archiving systems are better positioned to manage information assets, reduce risks, support decision-making, and meet regulatory requirements.

This course provides participants with a comprehensive framework for managing records and documents throughout their lifecycle, from creation and classification through storage, retention, archiving, and disposal. By integrating document control, records management, information governance, security, compliance, and digital transformation principles, participants gain the knowledge required to establish and maintain effective documentation systems.

By the end of the program, participants will be equipped to design, implement, and improve archiving and documentation management frameworks that enhance organizational performance, support compliance obligations, preserve institutional knowledge, and ensure reliable access to critical information across the organization.

