

## Documents Control & Record Management

*Lisbon (Portugal)*

*3 - 7 March 2025*

UK Traininig

# PARTNER



# Documents Control & Record Management

Code: IT28 From: 3 - 7 March 2025 City: Lisbon (Portugal) Fees: 5100 Pound

## Introduction

Record management is an inevitable part of any growing business. Hospitals need to keep records of their patients, schools of their students, and police departments of the criminals. Examples are everywhere. The information must be stored safely, and easily accessed by authorized personnel when needed. How to store this data? How to retrieve it? When to destroy it? All of these questions will be covered by this course. It will also explain the system of the ISO 15489.

This part of ISO 15489 describes concepts and principles relating to the records, metadata for records and records systems; policies, assigned responsibilities, monitoring, and training supporting the effective management of records; recurrent analysis of business context and the identification of records requirements; records controls; and processes for creating, capturing and managing records.

## Course Objectives of Documents and Record Control

- Understanding the ISO 15489 standards.
- Implementing the process of document and records management.
- Retrieving documents when needed.
- Understanding the documents and records lifecycle.
- Authorizing certain personnel to access the documents.

## Course Outlines of Documents and Record Control

### Day 1

#### Understanding the ISO 15489 standards

- Key records management terminology.
- ISO 15489: Information and Documentation – Records Management.
- Project and program planning.
- Document Management Systems DMS vs. Record Management Systems RMS.
- Information governance.
- Records life cycle.

### Day 2

#### classification and Managing physical records

- Records classification.
- Managing physical records.
- Automated processes.
- Turning paper documents into electronic documents.



- IT infrastructure details.

### Day 3

#### Implementing the process of document

- Implementation planning.
- Labeling and classification.
- Bar code.
- Filing segment.
- Cost Reduction.
- Validation.
- Indexing.
- Storage.

### Day 4

#### Understanding the documents

- Documents' retention policy.
- Document retention schedule.
- Documents' destruction.
- Security control.
- Version control.
- Metadata capture.

### Day 5

#### Authorizing certain to access the documents

- Information audit: monitoring compliance.
- Searching for files.
- Accession log.
- Distribution and sharing.
- Workflow.
- Collaboration.
- Reproduction of documents.



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