

# € TRAINING

Documents and Records Management



30 September -  
4 October 2024  
Lisbon (Portugal)



# Documents and Records Management

REF: K1363 DATE: 30 September - 4 October 2024 Venue: Lisbon (Portugal) - Fee: 5940 Euro

## Introduction:

This training program offers comprehensive instruction on the efficient organization, maintenance, and retrieval of organizational documents and records. Through this program, participants are equipped with the skills and strategies necessary to establish and maintain effective document management systems within their organization.

## Program Objectives:

At the end of this program, participants will be able to:

- Develop a records management program to enhance the value of the organization's information and reduce risk and cost.
- Develop document control methods to identify, secure, protect and retain critical information.
- Apply regulations and standards to the management of information for compliance.
- Identify risks associated with poor management of information to reduce penalties and cost.
- Develop an information asset register to identify critical information within their organization.

## Targeted Audience:

- Records managers and document controllers responsible for organizing and maintaining organizational records.
- Administrative professionals seeking to improve their document management skills.
- Employees involved in the creation, storage, and retrieval of documents within their organization.

## Program Outlines:

### Unit 1:

#### The principles of Managing Information:

- The organization: How your information is managed today.
- Definitions: Understanding what the information terms mean.
- Document control and records management: Similarities and differences.
- Your organization, Identifying its type, Identifying its staff, Identifying its information.

- Defining information goals for the organization.

## Unit 2:

### Document Control and Records Management Program Development Process:

- Defining the purpose, What to include.
- Document Control specifics, Records Management specifics.
- Records review.
- Identification of documents and records.
- Critical information, documents, and records.
- Electronic and physical formats, Storing records.

## Unit 3:

### Characteristics of a Document Control and Records Management Program:

- File plans, Challenges and problems, Classification of records.
- Retention and disposition.
- Laws, regulations, standards, and business requirements.
- Developing a retention schedule.
- Privacy and protection, Transparency, Integrity, Security.
- Business, historical, and preservation archives.

## Unit 4:

### People, Responsibilities, and Information Awareness:

- Psychology of filing.
- Accountability.
- Communication and collaboration.
- Creating the information management message.
- Knowledge transfer.
- Developing the education package.

- Sponsorship and guidance from senior management.

## Unit 5:

### Planning and Action:

- Information management strategy, Information asset register.
- Development of a plan to deliver document and records management.
- Policy and guidance writing.
- Document control and records management process plans.
- Change management.
- Risk and recovery: Disaster prevention and continuity planning.
- Creating an action plan.