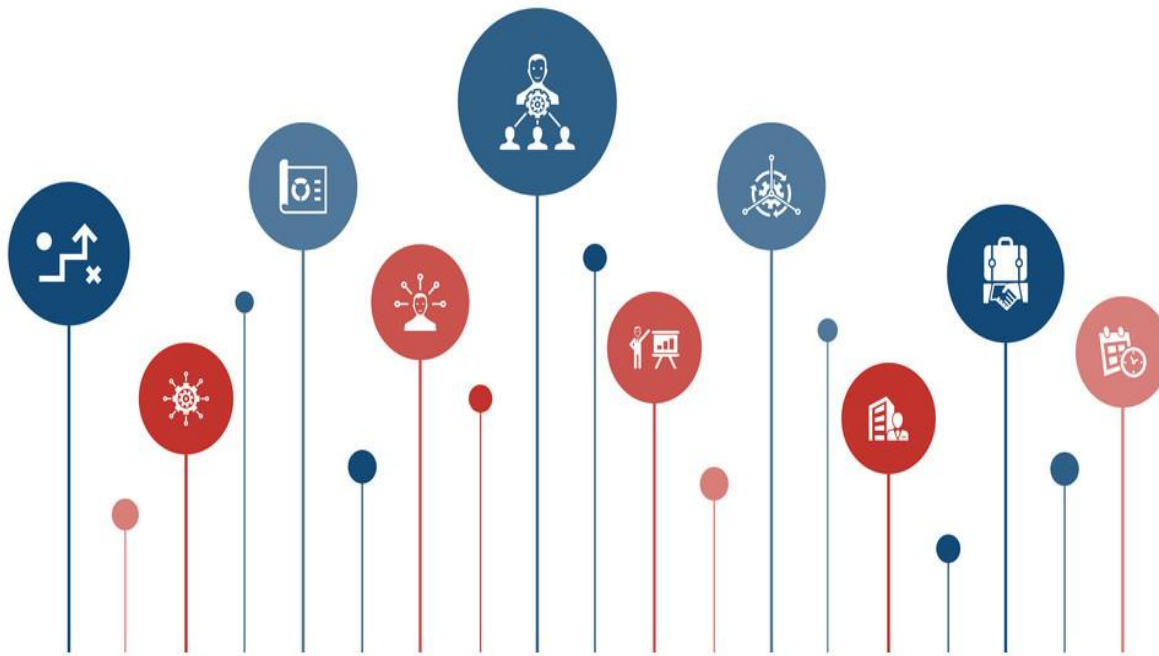


ADMINISTRATION

CREATIVE CONCEPT



Effective Document Control & Records Management

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Effective Document Control & Records Management

Introduction:

The world is packed with information; and most organizations struggle to recognize what information they have, why they need it, how long they need it for, and if it has any value. Furthermore, changes in law, often call for tighter controls on contract documentation, and lead to a need for enhanced management of human resource and contract records. In addition, electronic information is under threat from cyber-attack and personal information is at risk of exposure. As such, the development and implementation of a records management program that includes document control methods to identify, secure and protect critical information, is necessary for every organization. This course conveys practical methods for identifying and developing the systems of records management and document control that an organization needs. By the end, each participant will have a plan of action as well as the necessary skills to assist with the development and implementation of an appropriate program for managing their organization's documents, records and information.

Who Should Attend?

Administrative Personnel, Supervisors, Administration Officers, Administrators, Secretaries, Administrative Personnel, Clerks, Document Controllers, Executive Secretaries, Administrative Assistants, Assistant Controllers, Data Loaders, Camp Admins, Projects Administrators, Technical Assistants, Office Managers, existing or prospective Office Managers, records and information managers, Senior Administrators and Supervisors of junior level employees, anyone involved in office management and administration skills and practices, Privacy Officers, information security and

protection managers, litigation and discovery staff, compliance officers, internal auditors, IT and enterprise content management professionals, and administrative managers.

Course Objectives:

By the end of this course delegates will learn about:

- 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
- 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

Course Outline:

The Principles of Managing Information

- The organization: How your information is managed today
- Definitions: Understanding what the information terms mean
- Similarities and differences between document control and records management
- Your organization

- Defining information goals for the organization
- How to achieve information goals

Document Control and Records Management Program Development Process

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

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
- Business, historical and preservation archives

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

Planning and Action

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