

Advanced Documents & Records Management

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Muscat/ Sultanate of Oman

Introduction:

Information is the lifeblood of any organization. Without timely access to the correct information organizations can miss opportunities, provide incorrect information, make wrong decisions and breach regulations and laws. Finding and managing our information is a challenge for everyone. Ever increasing volumes, multiple formats, multiple copies, multiple storage location and inconsistent practices all lead to difficulties storing, managing and finding our information. This is especially true of our unstructured information – the documents and records that we all use.

Improving how we manage our documents and records can save organizations money by reducing storage, reducing time spent to find the correct information and ensuring that organizations do not breach regulations and incur penalties. Effective Document and records Management (DRM) provides organizations with the capability to leverage information effectively and meet compliance requirements.

This 5 day course provides attendees with a good understanding of how to effectively manage an organization's documents and records. The importance of information, and why it is difficult to manage, is explained, along with constraints and benefits of improving management of the information. Approaches and techniques to improve management of documents and records are explained, with practical exercises helping reinforce the concepts. Attendees will learn sound ways to develop and implement projects to improve document and records management within organizations.

Participants will develop the following competencies:

- Understand advanced records management policies, procedures and standards including ISO15489 and ISO27001
- Develop key strategies for meeting compliance, legal and audit requirements
- Create records management business tools like electronic file plan, retention and disposal rules, security rules, archiving, confidentiality and privacy
- Link how records management systems and implement across your organization
- Explore the implications of an Enterprise Content Management (ECM) strategy in conjunction with records management and information security

Who Should Attend?

- ✓ Document Control
- ✓ Records Management
- ✓ Office Management
- ✓ Operational Management

- ✓ Information Management Strategy
- ✓ Business Development
- ✓ Information Technology
- ✓ Corporate Information Security
- ✓ Compliance
- ✓ Information Governance

Course Objectives:

- To understand advanced records management policies, procedures, standards including information security standards
- Help develop business case and requirements for the selection and procurement of document and records management
- Create a records management and information security plan of action to implement in their organization and learn from best practice implementations and case studies
- Learn advanced concepts for managing information and records, such workflow, file plan, archiving, auditing, compliance and version control
- Review industry leading solutions and vendors in this marketplace
- Using metadata, business classification scheme, taxonomy and setting retention plans
- Learn how to implement legislation, standards and regulation
- Create advanced policies and procedures
- Setting up access controls and security procedures
- Develop storage models, audit trail and storage technologies

Course Content:

- Introduction to information & Documentation Management.
- Information security review ISO27001
- Advanced records management introduction according to ISO15489
- Creating records management audit register
- Create file plans, metadata plan, retention schedule
- Understanding security and compliance
- Document control & Security.
- Setting regulations & standards.
- Metadata and indexing.

- Classification schemes.
- Compliance, controls and security.
- Review IT records management systems
- Review ECM systems
- Scanning and legal issues
- Archiving and retention requirements
- Digital signatures and Digital rights Management.
- Implementation planning
- Setting up controls for ISO15489 and ISO27001
- Creating policies and procedures
- Creating a records management action plan
- Introduction to case studies
- Group 1 – Strategy
- Group 2 – Concepts
- Group 3 – Process
- Presentations

Evaluation and discussion