

€ TRAINING

Documents Controller





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Introduction:

This training program offers a structured curriculum designed to equip individuals with the skills necessary for efficient document management. By mastering document control processes and software tools, graduates are prepared to streamline document workflows and ensure compliance with organizational standards and regulations.

Program Objectives:

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

- Explain how Document Control and Records Management fit within the business objectives and environment of their organizations.
- Apply key Document Control and Records Management concepts and techniques to organizing and managing documents and records.
- Describe the most common reasons for poor document control, and how to improve the process.
- Explain the process of planning and implementing a Document Control Records Management DCRM solution.
- Apply best practices, yet key standards to Document Control and Records Management.

Targeted Audience:

- Document Controllers.
- Secretary.
- Administrators.
- EDMS planner in the office.

Program Outlines:

Unit 1:

Foundations of Document Control:

- Understanding document control fundamentals.
- Analyzing standards related to document control.

- Identifying the important elements of document control.
- Managing deliverables for your projects.
- Document identification, Document types, Templates.
- Transmittals.

Unit 2:

DocImplementing Document Control:

- Ensuring quality.
- Quality standards.
- Procedures and specifications.
- Roles and responsibilities.
- Document distribution.
- Document control systems.

Unit 3:

Records Management Techniques:

- Records management lifecycle.
- Capture, Classification.
- Metadata.
- Collaboration.
- Searching.
- Retention, Archiving and Disposal.

Unit 4:

Planning for Document Control and Records Management:

- Drivers for document control and records management.
- Standards and guidance.
- Regulations.

- The business case.
- Risk analysis.

Unit 5:

Implementing Document Control and Records Management:

- Designing a DCRM solution.
- Requirements for a solution.
- Selecting and implementing a DCRM system.
- Migration.
- Business as Usual.