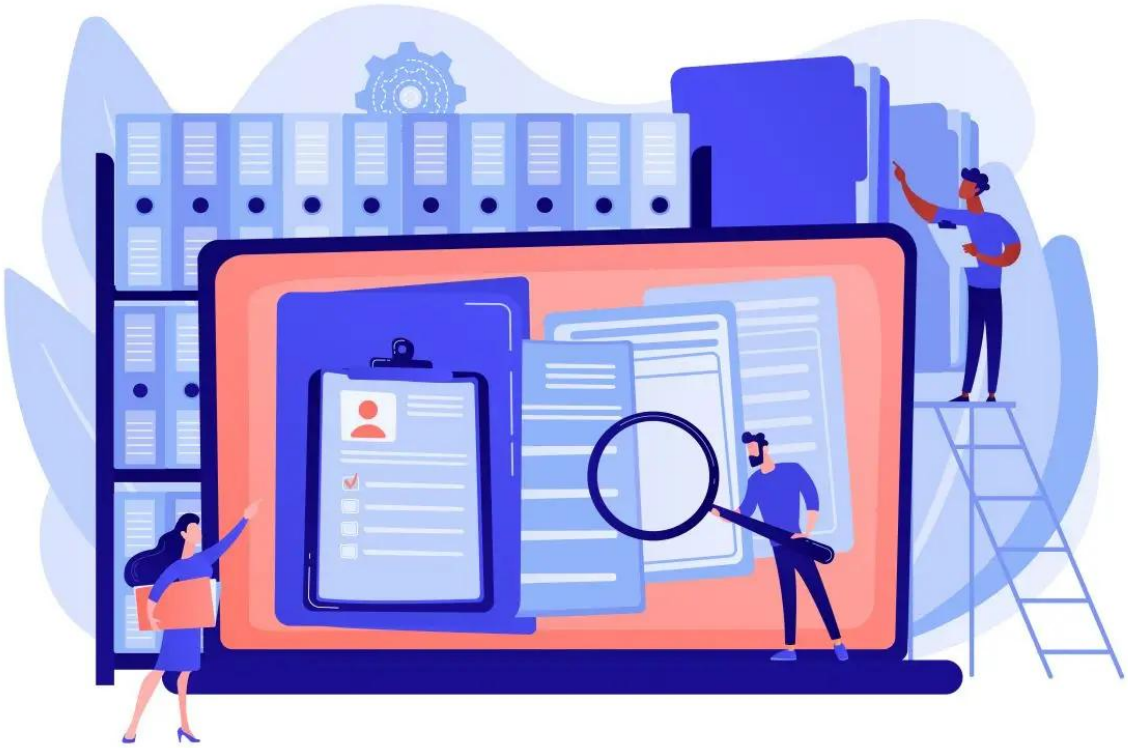


Understanding Record & Document Management for Your Business

Duration: 5 Days

Language: en

Course Code: MG1-105

Objective

During this course, you'll learn to:

- Understand ISO15489 on records management and when it's required.
- Discover the ISO27001 procedure on information security.
- Discuss Enterprise Content Management (ECM) in line with archiving and categorisation models.
- Create advanced data classification models and put them to use.
- Unearth advanced tools and methodologies to store data securely.

- Understand the importance of data recall, archiving security, and why a company may need to store data.
- Develop key strategies to audit documents and records following legal compliance requirements effectively.
- Work with key contacts to implement records management across an organisation.

Audience

This course is for you if you work as an:

- IT Manager.
- Technical Executive.
- Document controller.
- Administrator.
- Executive.
- Operations Manager.
- Data Analyst.
- Data Controller.
- Information Security Officer.
- People moving into leadership or management roles.

Training Methodology

This training course is developed for specific use in practical upskilling. You'll work through various strategic models using real data sets to uncover various instructional techniques.
You'll experience in-depth group work, critical analysis, and discussion groups to determine how accurate and secure document and record management can assist in the success of a business.

Summary

Throughout this course, you will acquire the essential skills and knowledge needed to secure contracts successfully. You'll learn to effectively integrate new contracts into your business model and meet client commitments. The course will guide you through various management strategies to oversee new contracts and review your performance, ensuring continuous improvement and development to maintain steady revenue growth.

Course Content & Outline

Section 1: Managing Information

- Creating accurate data and metadata file plans.
- Understanding why accurate record-keeping is essential for your business.
- Referencing and how to make it work for you.
- Create an accurate and amendable index.
- Gaining company buy-in to new record-keeping processes – pushing the benefits.

Section 2: Key Policies & Procedures

- Delve into the ISO15489 policy on record management.
- Understand ISO27001 and what it means for your audits.
- Digital signatures and their merits.
- Preserving documents and keeping traceable audit trails for amendments.
- Learning about your businesses’ taxonomy and advanced classification schemes/

Section 3: Storage Models & Audit Trails

- Selecting the most appropriate storage systems.
- How to create an effective audit rota.
- Categorising documents and understanding multi-pathway recall.
- Planning and implementation of new data.

Section 4: Learning Security Procedures

- Reviewing security and compliance in your business.
- Selecting an ECM system.
- Retention and archiving requirements.
- Creating new policies and procedures and enforcing them.

Section 5: Reporting & Displaying Findings

- How to pull data quickly and easily based on requirements.
- Understanding and displaying data.
- Pulling and sending records to a quick turnaround.
- Presenting findings with real-life data and documents.

Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by the British Assessment Council (BAC) and The CPD Certification Service (CPD), and are certified under ISO 9001, ISO 21001, and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

Categories

Administration & Secretarial, Quality & Productivity

Tags

Record management, Document Management, document control, ECM

Related Articles



Records Management 101: Everything You Need to Know

Explore records management across industries. Learn how it drives success through risk mitigation, compliance, and tech integration.

YouTube Video

https://www.youtube.com/embed/Z6AIj4dUssk?si=eiJ2aNI5I2uvS6hY