MERCURY

# Document Control and Records Management Course

1 – 5 March 2027
London (UK)



Dubai - UAE: +971 4 450 5697
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# Document Control and Records Management Course

**Ref:** 9027_1081211 **Date:** 1 – 5 March 2027 **Location:** London (UK) **Fees:** 5800 Euro

## Introduction:

The world is packed with information, and most organizations need help recognizing what information they have, why they need it, how long they need it, and if it has any value. Furthermore, changes in the law call for tighter controls on contract documentation and lead to a need for enhanced management of human resources and contract records.

Also, cyber-attacks threaten electronic information, and personal information is at risk of exposure. As such, every organization must develop and implement a records management program that includes document control methods to identify, secure, and protect critical information.

This document control and records management 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 and the necessary skills to assist with developing and implementing an appropriate program for managing their organization's documents, records, and information.

## Targeted Groups:

- Records and Information Managers.
- Privacy Officers.
- Information Security and Protection Managers.
- Litigation and Discovery Staff.
- Compliance Officers.
- Internal Auditors.
- Enterprise Content Management Professionals.
- Administrative Managers.

## Course Objectives:

At the end of this document control and records management course, the 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 costs.
- Develop an information asset register to identify critical information within the organization.

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## Targeted Competencies:

At the end of this document control and records management course, the target competencies will be able to:

- Records Management.
- Document Control.
- Information Management.
- Information Asset Identification.
- Business Case Development.

## Training for Document Control and Records Management Professionals:

For individuals seeking to formalize their expertise, a records management certificate can signify proficiency and dedication to the field. The document control and records management training will also cover crucial topics that are often part of the certification curriculum.

A certified document controller training course often involves comprehensive studies culminating in a formal examination. A records management training course or a document controller course can provide practical skills and knowledge essential for those who aim to specialize in this area.

Whether you aim to become a certified document controller or want to strengthen your understanding of records management, this course is designed to align with document control and records management training standards.

Participants who complete this course gain a stronger grasp of records management and document control procedures, which is essential for successfully navigating the complexities of information governance in various organizations.

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## Course Content:

### 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.
- How to achieve information goals.

### Unit 2: 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.

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## 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.
- Develop a plan to deliver documents and manage records.
- Policy and guidance writing.
- Information asset register.
- Document control and records management process plans
- Change management.
- Risk and recovery: Disaster prevention and continuity planning.
- Creating an action plan.