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CONSULTANTS

DATA MANAGEMENT AND BUSINESS INTELLIGENCE | COURSE

Document Control and Records Management

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Course content

Why Attend

On this Document Control and Records Management course, participants will uncover the root causes of inefficient documentation processes, deepening their understanding of their impact on workflows. Armed with these insights, participants will delve into a meticulously curated set of best practices, enabling them to design cost-effective, forward-looking corporate strategies. By embracing these practices, participants will lead the transition toward paperless offices, not only saving resources but also safeguarding document integrity and positioning their organizations for the future.

Drawing insights from Enterprise Content Management (ECM) and Records and Information Management (RIM) enterprise analyses, participants will be equipped to guide their organizations through transformation with confidence.

This course is an opportunity to embark on a journey that reshapes documentation approaches, enhancing both skill sets and organizational success.

This interactive course uses instructor led presentations, videos and group work to explain key document control concepts.

By the end of the course, participants will be able to:

• Recognize underlying factors contributing to inefficiencies within the documentation process

• Use proven methods to introduce a cost-effective and future-proof corporate strategy for documentation that helps achieve a paperless office

• Coordinate the processes of change management related to documentation, using knowledge from Enterprise Content Management (ECM) and Records and Information Management (RIM) enterprise analyses

• Develop a comprehensive understanding of significant technical documentation cases from multiple viewpoints

• Create and implement a documentation project process from initiation to completion following established procedures

This course is designed for anyone who is required to implement and handle any type of documents; including, but not limited to, procurement, operational, administrative or legal documents.

• Document control

Course content

Why Attend

• Records management

• Designing policies

• Project management

• Quality control

Course outline

Setting procedures, templates and standard forms

• Electronic Document Management System (EDMS) recommendations and implementation according to ISO standards

• Establishing a Document Management System, including the creation, review, approval, saving, and publishing of internal documents

• Creating a process map, effective procedures, and work instructions

• Training departmental staff and train the trainer

Document control requirements

• Challenging existing or legacy Document Management Systems

• Maintaining and retaining project and engineering documentation

• Reviewing the structure and components of a Data library

• Indexing and document numbering

Going paperless

• EDMS recommendations; in house or off the shelf application advantages and disadvantages

• Benefits of establishing a Document Control System

• Going paperless from start to finish

Course content

Course outline

- Meeting contractual obligations and stakeholder requirements
- Revision control, design changes and markup
- Project safekeeping of legacy documents and archiving solutions including data loss prevention

Document control policies and procedures

- Standardized document management
- Developing a document control policy
- Implementing a document access policy
- Creating multiple degrees of control for different types of documents
- Tracking document versions
- Creating document retention policies

Document storage

- Creating a central storage site for documents
- Creating levels of control for different types of documents
- Providing a mechanism to track document versions
- Using a consistent naming convention for documents
- Ensuring all stakeholders understand the policy and its scope
- Retrieving and archiving documents

Quality and compliance

- Improving data quality
- Enhancing compliance
- What is information management?

Course content

Course outline

- Implementing automated processes for data sharing
- Defining a process for capturing information

Seminar dates

Available seminar dates

Live dates and pricing for Document Control and Records Management generated from the course details page.

Date	Location	Format	Fee
17 - 21 August 2026	Barcelona - Spain	Classroom	**€3,850.-**
21 - 25 September 2026	Frankfurt - Germany	Classroom	**€3,250.-**
19 - 23 October 2026	Rome - Italy	Classroom	**€4,250.-**
2 - 6 November 2026	Kuala lumpur - Malaysia	Classroom	**€2,250.-**
21 - 25 December 2026	Barcelona - Spain	Classroom	**€3,850.-**
17 - 21 August 2026	Paris - France	Classroom	**€4,500.-**
21 - 25 September 2026	Frankfurt - Germany	Classroom	**€3,250.-**
19 - 23 October 2026	Barcelona - Spain	Classroom	**€3,850.-**
2 - 6 November 2026	Frankfurt - Germany	Classroom	**€3,250.-**
21 - 25 December 2026	Rome - Italy	Classroom	**€4,250.-**

Live online option	Online delivery is available at €1,850.-.