

DOCUMENT CONTROL AND ARCHIVING CERTIFICATION PROGRAMME

IF YOU ARE LOOKING FOR AN EFFECTIVE DOCUMENT CONTROL SYSTEM, IT MEANS THAT COMPLIANCE IS AN IMPORTANT ASPECT IN YOUR ORGANISATION. THE USE OF OUT-OF-DATE VERSIONS OF DOCUMENTS CAN AFFECT THE EFFICIENCY, QUALITY, AND CAUSE FINANCIAL LOSSES TO THE ORGANIZATION.



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OVERVIEW

Are you interested in Document Control or want to be a Document Controller? What does Document Control mean?

This training course offers participants the important foundations and best practices for document control. The program is designed to provide expertise to those who want to develop their skills as a document controller. At the very core of a quality management system are the management and the control of documents. If you are looking for an effective document control system, it means that compliance is at the back of your mind. The use of out-of-date versions of documents can affect the efficiency, quality, and cause financial losses to the organization.

Document control ensures that only approved documents are used and in circulation throughout the organization. In the contemporary work environment and in the modern styles of operations, there are multiple meetings and documents created for innovative processes and procedures. All this cannot be retained by memory and so a document plays a very important role.

Large companies need to focus on their document control staff, who will ensure document quality procedures are followed and specialized tools are used to keep control of their documents and compliance in the workplace. It is well known that most of the non-compliance is reported through document audits based on ISO9001 QMS.

A lot of businesses struggle to retrieve their required documents. Document Control is a powerful system for retrieving the correct documents at the right time. There is no wastage of productivity and time when a proper Document Control System is established within an organization. Control of documents could also mean functions like editing and modification of documents, updates added to current and existing documents, withdrawal of old and expired documents, and the security of the original documentation.

A good Document Controller ensures that the document and information obtained in the hands of an officer or executive is the most up to date one. A good document control system also progresses towards the concept of paperless process automation.

OBJECTIVES

At the end of this Training Certification Course, participants will:

- Learn the importance of document traceability and retrievals.
- Learn the tools and techniques to manage document quality and consistency.
- Understand the importance and the important role of a document controller.
- Structure and develop an effective Document Control System.
- Prepare a checklist and perform critical quality checks over documents.
- Frame procedures and reporting systems for Document Control.
- Ensure compliance of document movements, distribution, and transmittals.
- Define and Manage the process of internal/external business documentations and Corporate Document Control.
- Understand the inevitability of the electronic document management system.

TRAINING METHODOLOGY

Jamela Resources Consulting developed this training program to be very insightful, with a balanced combination of lectures, workshops, presentations, and peer-review sessions. This program is a skill and knowledge-based program with the industry's best practices and standards as its contents. Organizational experiences, strategies, and other adult-learning methods will be used to achieve the learning objectives. Active participation and involvement are expected from all participants throughout this certification training. Customization can be offered based on your current organizational challenges and requirements.

We follow the Do–Review–Learn–Apply Model in all our training programs, including a pre-course and post-course assessment to ensure your learning objectives are met.

ORGANISATIONAL BENEFIT

Organizational benefits of employees who take up this Certification Program will be as below:

- A stronger access control system throughout the organization.
- An improved compliance.
- Noticeable greater accountability for transparency of information.
- A global collaboration with systemized documentation.
- Improved quality management will be maintained within the organization.
- The disaster recovery plan becomes much easier to implement.
- Business-wide streamlining for movement and use of documents.
- Easy search and navigation of documents and information.
- Comprehensive quality management systems.
- Better security of data and information.

PERSONAL BENEFIT

Participants who enrol in this Certification Program will benefit in the following ways:

- Individuals become more systemized in their work.
- They are organized in the tasks that are assigned to them.
- They learn time management skills with effective work management.
- They give importance to innovation and creativity.
- They are skilled in coordination and delegation of tasks.
- They foster perfection and discipline at work.
- They become a value add to the people around them.
- Individuals better manage their competencies.

WHO SHOULD ATTEND?

- Individuals who are involved in any aspect of document control and records management.
- Professionals involved in document management strategies.
- Process efficiency executives.
- Administrators involved with managing paper and electronic documents.
- Records managers.
- Information security professionals.
- Compliance officers.
- Document controllers.
- Internal auditors.
- Document management supervisors.
- IT and enterprise content management professionals.
- IT Managers
- All individuals seeking to enhance their skills as Document Controllers or who want to start their career as a Document Control Specialist.

COURSE OUTLINE

Below are the course modules that will be covered:

Module One: Key Concepts of Documents Control and Information Management

- Importance of Document Control and a Document Control Manager
- Document Control need of an organization.
- Document Control vs Records Management
- Information Governance.
- Information Management Strategy.
- Document Control Standards and Policies.
- ISO Standard ISO15489.
- Establishing Procedures and Guidelines.

Module Two: Document Control: Definitions and Terminologies

- Document and Records Lifecycle.
- Basics of Document flow Management.
- Capturing and Storage Management.
- Preservation and Archiving.
- Metadata and Indexing.
- Letter coding methods.
- Filing and Numbering.
- File movement procedure.
- Submittals and Transmittals.
- Searching and Retrieving.
- Controls and Security.
- Legislation, Standards, and Regulation.

Module Three: Setting up a Document Control System and Framework

- Document Control for a new project.
- Document Control Objective Analysis and Business Requirements.
- Implementation Planning.
- Identification of documents and records.
- Electronic and physical records.
- Retention and disposition.
- Implementation of procedures, policies, templates, and registers.
- Workflow Design.
- IT Infrastructure.
- Privacy and Compliance.

COURSE OUTLINE

Below are the course modules that will be covered:

Module Four: Document Control Compliance

- Monitoring compliance.
- Maintaining traceability.
- MIS Reporting and Statistics.
- Reporting status of documents.
- ISO15489: Deep Dive.
- Assigning responsibilities and accountability.
- Risk and recovery: Data Disaster Management.
- Business Continuity Plan.
- Internal Document Audits and Controls.

Module Five: Drafting Document Control Procedures and Policies

- Document Control procedure and requirements: Tips.
- Understanding formal clauses and legal phrases.
- Processes and Procedures.
- Framing policies easy to understand.
- Producing fool-proof procedures.
- Process change and Improvisation.
- Laws, regulations, standards and business requirements.
- Transparency and Security.
- Confidentiality and Critical Documents.

Module Six: Document Control Functions and Operations

- Establish clear ownership.
- Process Change Management.
- Trained Staff and resource allocation.
- •Templates for Standard usage.
- •Document Retention Policy.
- •Document Management Policy.
- •Document traceability.
- Security practices: Classified and Secure documents.
- Document Handling workflow.
- Document Controller: Training and qualifications

COURSE OUTLINE

Below are the course modules that will be covered:

Module Seven: Document Control Challenges

- Collaboration during Document Creation.
- Document Approval & Distribution.
- Document Change Process and Control.
- Tracking of document revisions.
- Clerical nature of documentation.
- IT Systems and cloud storages
- System Integrations
- Document errors.

Module Eight: Document Control Systems

- Paperless documentation and Electronic Records Management.
- Automation and Digitalization of Documents.
- Document Management System (DMS).
- User-friendly user Interface based in business process.
- Integrating Records Management with Business Systems and Processes.
- Securing Systems and Security