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# Course: Documents and Records Management Compliance: (ISO: 15489 Standard)

Code	City	Hotel	Start	End	Price	Language - Hours
687	Zurich (Switzerland)	Hotel Meeting Room	2025-11-17	2025-11-21	5450 €	En - 25

## INTRODUCTION

Managing documents, records and content can be difficult. How do you best capture, manage and store the documents and records in your organisation? Does your approach meet compliance requirements, regulations and standards? What is the best way to manage emails, web pages and electronic documents and records? How do you find the right documents and records when you need them? How does workflow and business process management work with documents and records management to help increase efficiency within your company? ISO 15489 is the international standard for records management. It is about attaining a records management benchmark of best practice, setting up methodology, processes and the resulting data storage and using an electronic records management system.

This programme covers the strategies, tools, and technologies used to capture, categorise, manage, store, preserve (archive), and deliver documents and records in support of business processes. This programme also covers the the core components of ISO 15489 so that organisations become compliant with best practices.

### In this programme you will learn how to:

- Understand the key concepts and overall architectural scope
- Develop business cases and business requirements
- Use the concepts of document and records management to deliver business drivers
- Link how document and records management can be implemented across your



organisation

- Explore the implications of an Enterprise Content Management (ECM) strategy in conjunction with document and records management
- Understand the key concepts and overall scope of ISO 15489 and how to apply ISO 15489 in your organisation

## WHO SHOULD ATTEND?

**This programme will prove to be a useful and productive for all those who are interested in understanding document and records management and how it can be implemented successfully. It will be of benefit to:**

- Document and Records Management personnel
- Document Management Supervisors
- Suppliers, Solution Providers and Vendors
- Executives
- Users of Document and Records Management
- Personnel seeking to enhance their skills
- IT Management
- Technical staff

## PROGRAMME OBJECTIVES

- To understand document and records management lifecycle
- To understand ISO 15489 records management standard
- Review how to implement a records management system based on ISO 15489
- Help create business case and requirements for the selection and procurement of document and records management
- Create a document and records management plan of action to implement in their organization and learn from best practice implementations and case studies



- Concepts for managing information and content, such workflow, business process and collaboration
- Review industry leading solutions and vendors in this marketplace  
Using metadata, business classification scheme, taxonomy and setting retention plans
- Learn about legislation, standards and regulation
- Set up search and retrieval
- Setting up access controls and security
- Develop storage models, audit trail and storage technologies

## **TRAINING METHODOLOGY**

Participants will learn by active participation during the programme through the use of a wide variety of instructional techniques. There will be group exercises to allow for a “hands on” approach to learning. Case studies will be utilized to present “best practices” approaches. In addition there will be in depth discussion of critical success factors.

## **PROGRAMME SUMMARY**

This programme covers all the essential skills needed to understand, use and apply document and records management and all the essential skills needed to understand, use and apply ISO 15489 records management standard. There will be discussions on the use of software, best practice implementation as well as applying all the key concepts. The programme will concentrate on the skills required to effectively deploy and maximise the benefit of document and records management as well as manage the outcomes and deliver business benefits. All participants will return to their organizations with a detailed understanding and have developed action plans to implement document and records management successfully in their organisations.

## **PROGRAMME OUTLINE**



## **DAY 1 - Strategy and understanding key elements**

- Introduce document and records management
- ISO 15489 introduction
- ISO 15489 Part 1 and Part 2 overview
- Business case and drivers
- Creating business requirements
- Managing information assets
- Understanding the terminology
- Document and records management strategies
- Information governance

## **DAY 2 - Concepts and set up components**

- Document and records lifecycle
- Capture, store and management
- Preserve and archive
- Presentation and delivery
- Metadata and indexing
- Classification schemes
- Searching and retrieving
- Controls and security
- Legislation, standards and regulation

## **DAY 3 - Process and delivery**

- Information audit and survey
- Business case
- Business requirements
- ISO 15489 Part 1
  - How to set ISI 15489 policies and standards
  - Assigning responsibilities and authorities
  - Establishing procedures and guidelines



- Business classification scheme
- IT infrastructure details
- Model office and rollout

## **DAY 4 - Implementation Planning**

- Implementation planning
- ISO 25489 Part 2
  - Designing, implementing and administering specialized systems for managing records
  - Integrating records management into business systems and processes
- Information audit and survey
- Project and programme planning

## **DAY 5 - Case Studies**

- Introduction to case studies
- Group 1 - Strategy
- Group 2 - Concepts
- Group 3 - Process
- Presentations
- Evaluation and discussion



**The Scandinavian Academy for Training and Development employs modern methods in training and skills development, enhancing the efficiency of human resource development. We follow these practices:**

• **Theoretical Lectures:**

- We deliver knowledge through advanced presentations such as PowerPoint and visual materials, including videos and short films.

• **Scientific Assessment:**

- We evaluate trainees skills before and after the course to ensure their progress.

• **Brainstorming and Interaction:**

- We encourage active participation through brainstorming sessions and applying concepts through role play.

• **Practical Cases:**

- We provide practical cases that align with the scientific content and the participants specific needs.

• **Examinations:**

- Tests are conducted at the end of the program to assess knowledge retention.

• **Educational Materials:**

- We provide both printed and digital scientific and practical materials to participants.

• **Attendance and Final Result Reports:**

- We prepare detailed attendance reports for participants and offer a comprehensive program evaluation.

• **Professionals and Experts:**

- The programs scientific content is prepared by the best professors and trainers in various fields.

• **Professional Completion Certificate:**

- Participants receive a professional completion certificate issued by the Scandinavian Academy for Training and Development in the Kingdom of Sweden, with the option for international authentication.

• **Program Timings:**

- Training programs are held from 10:00 AM to 2:00 PM and include coffee break sessions during lectures.