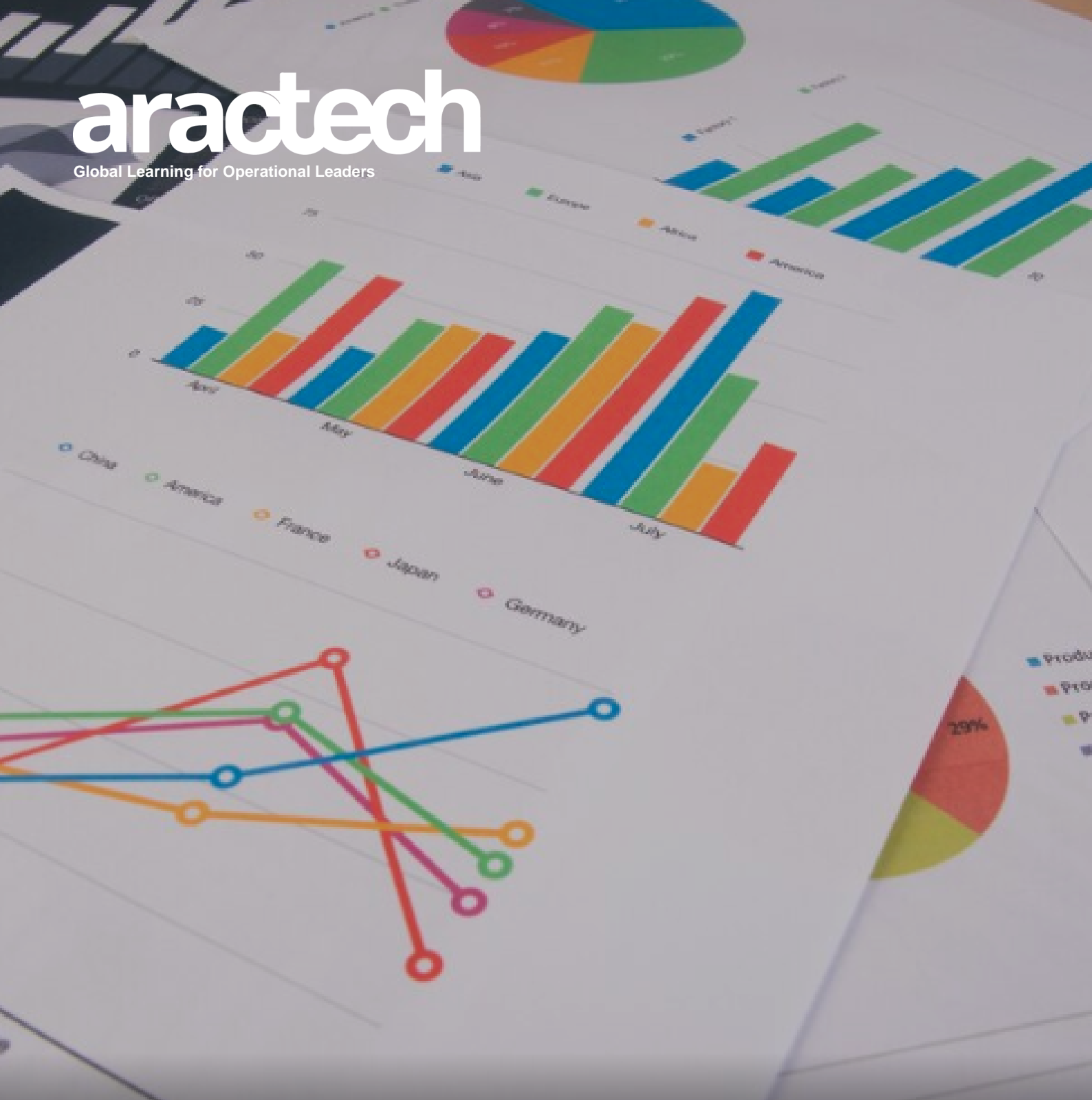


# aractech

Global Learning for Operational Leaders



DATA MANAGEMENT AND BUSINESS INTELLIGENCE

## 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.

## Course Methodology

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

## Course Objectives

- 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

## Target Audience

- 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.
- Target Competencies
- Document control

- Records management

# Course outline

## Detailed course outline

Module-by-module outline for Document Control and Records Management.

### Module 1 - 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

### Module 2 - 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

### Module 3 - 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
- Meeting contractual obligations and stakeholder requirements
- Revision control, design changes and markup
- Project safekeeping of legacy documents and archiving solutions including data loss prevention

# Course outline

## Detailed course outline

Module-by-module outline for Document Control and Records Management.

## Module 4 - 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

## Module 5 - 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

# 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
18 - 22 May 2026	Barcelona	Classroom	€2,695
22 - 26 June 2026	Paris	Classroom	€3,150
13 - 17 July 2026	Frankfurt	Classroom	€2,275
17 - 21 August 2026	Barcelona	Classroom	€2,695
21 - 25 September 2026	Frankfurt	Classroom	€2,275
19 - 23 October 2026	Rome	Classroom	€2,975
2 - 6 November 2026	Kuala Lumpur	Classroom	€1,575

**Live online option**

Online delivery is available at €1,250.