

Document Control & Records Management: Best Practices Course

IT & IT Engineering
Cape Town (South Africa)
06 - 10 Oct 2025

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Document Control & Records Management: Best Practices Course

Ref: 3156_137189 **Date:** 06 - 10 Oct 2025 **Location:** Cape Town (South Africa) **Fees:** 3300 Euro

Course Description

This comprehensive 5-day course provides participants with essential knowledge and practical skills in document control and records management. Attendees will learn industry best practices, regulatory compliance, and digital tools to effectively manage organizational information assets.

Learning Objectives

- Understand fundamental principles of document control and records management
- Implement effective document lifecycle management processes
- Develop strategies for ensuring regulatory compliance and information security
- Utilize digital tools and systems for efficient document and records management
- Apply best practices for organizing, storing, and retrieving information

Course Modules

Day 1: Foundations of Document Control and Records Management

- Introduction to document control and records management concepts
- Regulatory landscape and compliance requirements
- Document lifecycle management
- Roles and responsibilities in information governance

Day 2: Document Control Processes and Best Practices

- Document creation, review, and approval workflows
- Version control and change management
- Document naming conventions and metadata
- Document distribution and access control

Day 3: Records Management Strategies

- Records classification and retention schedules
- Physical and electronic records management
- Legal holds and e-discovery processes
- Records disposal and destruction methods

Day 4: Digital Tools and Systems

A graphic featuring a chessboard with several chess pieces (a king, a queen, a rook, and a pawn) and the text 'UK Training PARTNER' in a bold, sans-serif font.

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- Document management systems DMS overview
- Electronic records management systems ERMS
- Cloud-based document control solutions
- Integration with enterprise content management ECM platforms

Day 5: Implementation and Continuous Improvement

- Developing document control and records management policies
- Training and change management strategies
- Auditing and quality control measures
- Continuous improvement and emerging trends

Practical Wins for Participants

- Create a customized document control and records management framework
- Implement effective version control and change management processes
- Develop a records retention schedule aligned with regulatory requirements
- Select and configure appropriate digital tools for document and records management

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