

# Document Control and Records Management Mastery Course

22 – 26 August 2027  
Riyadh (KSA)

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## Document Control and Records Management Mastery Course

**Ref:** 322633\_236592 **Date:** 22 – 26 August 2027 **Location:** Riyadh (KSA) **Fees:** 4200 GBP

### Why This Course

Modern organizations depend on accurate, accessible, secure, and well-controlled information. When documents and records are poorly managed, teams can face version confusion, compliance risks, slow retrieval, duplicated work, data loss, and inefficient decision-making.

Effective document control and records management ensure that the right information is created, reviewed, approved, stored, protected, retrieved, retained, and disposed of in a structured way. They also support regulatory compliance, accountability, operational efficiency, business continuity, and digital transformation.

This comprehensive 5-day course equips participants with the knowledge and practical tools needed to manage documents and records effectively in modern organizations. Through real-world examples, process design activities, compliance discussions, digital system reviews, and implementation planning, participants will learn how to build reliable information management practices that improve control, security, and organizational performance.

### What You'll Learn and Practice

By joining this program, you will:

- Understand the principles of document control and records management.
- Manage document and record lifecycles from creation to disposal.
- Develop effective document control and records management systems.
- Understand regulatory requirements and industry standards for information management.
- Define roles, responsibilities, workflows, and approval authorities.
- Apply document creation, review, approval, distribution, and access control processes.
- Implement version control and change management practices.
- Use metadata, indexing, classification, and retention schedules effectively.
- Manage physical and electronic records storage, retrieval, and disposition.
- Apply best practices for digital record-keeping, data protection, and information security.
- Explore electronic document management systems and cloud-based collaboration tools.
- Build an implementation and continuous improvement plan for information management.

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A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver, set against a background of concentric circles.

## The Program Flow

### Day 1: Foundations of Document Control and Records Management

- Introduction to document control and records management concepts.
- Understanding the difference between documents and records.
- Document and record lifecycles.
- The importance of accuracy, traceability, accessibility, and accountability.
- Regulatory landscape and compliance requirements.
- Roles and responsibilities in information management.
- Practical exercise: Assessing current document and records management challenges.

### Day 2: Document Control Processes and Best Practices

- Document creation, review, approval, and release workflows.
- Version control, revision history, and change management.
- Document distribution and access control.
- Managing controlled and uncontrolled copies.
- Metadata management and indexing.
- Document numbering, naming conventions, and classification structures.
- Workshop: Designing a document control workflow and version control process.

### Day 3: Records Management Strategies

- Records classification and retention schedules.
- Identifying record types, ownership, and retention requirements.
- Physical and electronic records storage solutions.
- Records retrieval, tracking, disposition, and disposal processes.
- Legal holds, audit trails, and evidence preservation.
- Disaster recovery and business continuity planning for records.
- Practical exercise: Developing a compliant records retention and disposition schedule.

### Day 4: Digital Solutions and Information Security

- Electronic Document Management Systems and their core features.
- Cloud-based storage and collaboration tools.
- Selecting digital solutions based on organizational needs.
- Data protection and information security best practices.
- Access permissions, confidentiality, backup, and recovery controls.
- Digital signatures and authentication methods.
- Workshop: Designing a strategy for transitioning to a digital document management system.

## Day 5: Implementation and Continuous Improvement

- Developing a document control and records management strategy.
- Building policies, procedures, responsibilities, and governance structures.
- Change management and staff training.
- Auditing and compliance monitoring.
- Measuring system effectiveness and user adoption.
- Continuous improvement methodologies for information management.
- Final activity: Creating a customized document control and records management plan.

## Individual Impact

- Strengthen your understanding of document control and records management practices.
- Improve your ability to design workflows, controls, and retention processes.
- Build confidence in managing compliance, version control, and information security.
- Gain practical tools for organizing, protecting, and retrieving documents and records.
- Improve your ability to support digital transformation in information management.
- Develop a structured plan that can be applied directly in your organization.

## Work Impact

- Improve information accuracy, accessibility, and traceability.
- Reduce compliance risks and strengthen audit readiness.
- Minimize version confusion, duplication, and document misuse.
- Improve efficiency through better storage, retrieval, and document workflows.
- Strengthen data protection, confidentiality, and business continuity.
- Support a more disciplined, secure, and digitally enabled information management culture.

## Training Methodology

This program uses a practical and process-focused approach to help participants improve document and records management in real organizational settings. Learning methods include:

- Interactive discussions and guided facilitation.
- Case studies on document control and records management challenges.
- Document lifecycle and workflow mapping exercises.
- Version control and change management workshops.
- Records classification and retention schedule activities.
- Digital document management system review exercises.
- Information security and compliance scenarios.
- Group work, peer feedback, and practical implementation planning.

A graphic of a chessboard with several chess pieces, including a king, queen, and pawns, arranged on the board. The text 'UK Training PARTNER' is overlaid on the image.

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## Beyond the Course

Upon completion, participants will be prepared to manage documents and records with greater structure, compliance, and efficiency. They will return ready to:

- Create a customized document control and records management plan.
- Implement effective version control and change management processes.
- Develop compliant retention and disposition schedules.
- Improve document access, storage, retrieval, and security.
- Support transition to digital document management systems.
- Strengthen organizational efficiency through better information governance.

A graphic of a chessboard with several chess pieces (a king, a queen, and a pawn) on it, set against a background of concentric circles.

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