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GLOBAL  
LEADERSHIP  
CONSULTANTS

DATA MANAGEMENT AND BUSINESS INTELLIGENCE | COURSE

# Document Control and Records Management

## UK

+44 33 000 111 90

[info@infomatech.co.uk](mailto:info@infomatech.co.uk)

<https://infomatech.uk>

63-66 Hatton Garden Hatton Garden

EC1N 8LE, London

## NL

+31 85 74 444 46

[info@infomatech.nl](mailto:info@infomatech.nl)

<https://infomatech.nl>

Waarderweg 50 - 2031PB

Haarlem - Netherlands

Tel : +44 (33) 000 111 90

Our mailing address is:  
63-66 Hatton Garden, EC1N 8LE, London

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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.

This course is an opportunity to embark on a journey that reshapes documentation approaches, enhancing both skill sets and organizational success.

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

By the end of the course, participants will be able to:

- 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

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.

- Document control



# Course content

## Why Attend

- Records management
- Designing policies
- Project management
- Quality control

## Course outline

### 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

### 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

### 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



# Course content

## Course outline

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

## 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

## 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

## Quality and compliance

- Improving data quality
- Enhancing compliance
- What is information management?



# Course content

## Course outline

- Implementing automated processes for data sharing
- Defining a process for capturing information

# 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      |
|------------------------|-------------------------|-----------|----------|
| 22 - 26 June 2026      | Paris - France          | Classroom | €4,500.- |
| 13 - 17 July 2026      | Frankfurt - Germany     | Classroom | €3,250.- |
| 17 - 21 August 2026    | Barcelona - Spain       | Classroom | €3,850.- |
| 21 - 25 September 2026 | Frankfurt - Germany     | Classroom | €3,250.- |
| 19 - 23 October 2026   | Rome - Italy            | Classroom | €4,250.- |
| 2 - 6 November 2026    | Kuala Lumpur - Malaysia | Classroom | €2,250.- |
| 21 - 25 December 2026  | Barcelona - Spain       | Classroom | €3,850.- |
| 22 - 26 June 2026      | Vienna - Austria        | Classroom | €4,250.- |
| 13 - 17 July 2026      | Barcelona - Spain       | Classroom | €3,850.- |
| 17 - 21 August 2026    | Paris - France          | Classroom | €4,500.- |
| 21 - 25 September 2026 | Frankfurt - Germany     | Classroom | €3,250.- |
| 19 - 23 October 2026   | Barcelona - Spain       | Classroom | €3,850.- |
| 2 - 6 November 2026    | Frankfurt - Germany     | Classroom | €3,250.- |
| 21 - 25 December 2026  | Rome - Italy            | Classroom | €4,250.- |

### Live online option

Online delivery is available at €1,850.-.