DOCUMENT CONTROL

Records & Document Management Fundamentals (DOC001)

Traditional Learning Pathway

COURSE CONTENTS

INTRODUCTION TO DOCUMENT CONTROL

What is document control?

Controlled documents vs records

Legislation and standards governing public authorities

Why document control is important

When to do it

THE BASICS OF DOCUMENT CONTROL

Document control checks

Gatekeeping

Document control procedures

Working with digital documents

File types of controlled digital content

THE DOCUMENT LIFECYCLE

Understanding the document lifecycle

How to manage documents at each step

The approval process

Obsolete documents

Common approval and authorisation workflows

The role of the document controller

DOCUMENT IDENTIFICATION

Making sure that documents are identifiable

Means of identification

DOCUMENT DISTRIBUTION

Efficient and relevant distribution of documents

The challenges of the hard copy

CLASSIFYING AND FILING

How to organise documents

What is a corporate file plan?

How to design an effective file plan

Managing information security

Using the file plan

Retrieving documents

Searching vs browsing

RECORDS MANAGEMENT

Strategically manage record keeping

Create and capture a record

Keep and manage records

Information security & confidentiality

How long are records kept?

Retention and disposal schedules

Safely disposing of records

What are archives?

Business continuity and disaster management

Right to information

Information privacy

Control of email records

ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS

ERDMS overview

What is a document store?

DOCUMENT MANAGEMENT AND SHAREPOINT

Introducing SharePoint

Viewing SP web pages

File plan and hierarchy

Sites, sub sites & document libraries & folders

Permissions and roles

Finding, opening & viewing content

Contributing to SP

Checking in a document

Version control

Working with metadata

Approval process

Workflows and alerts

Registers and lists

QUALITY CONTROL OF DOCUMENTS

Word footers

PDF vs Word

Document security and passwords

Signatures & authorisation

Digital signatures

Electronic approval and authorisation

Change management

Audit trails

DOCUMENT CONTROL FUNDAMENTALS

COURSE LENGTH

Recommended course duration is 2 days, typically 8:30am – 4:30pm each day. The delivery of this course is approximately 50 percent theory and concepts, and 50 percent practical application using Microsoft Word and SharePoint.

AIM

This course has been designed to allow participants to gain:

- an understanding of the importance of accurate document control
- an understanding of a document's lifecycle
- skills to perform their role in the document control process

TARGET AUDIENCE

This course is a beginner's course and assumes basic prior knowledge of office procedures such as saving, filing and retrieving documents. It is suitable for participants who:

- receive, create or collaborate on documents or corporate records as part of their job
- want to learn document managements skills
- need to comply with legislation and corporate policy relating to document control
- want to learn how to manage documents using SharePoint or another Electronic Records & Data Management System

OUTCOMES

By the end of this session you should be able to:

- explain the terms "controlled document" and "corporate record"
- understand the purpose and structure of your organisation's file plan or document store
- identify, classify and file a corporate record

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