



# Documents and Records Management: (ISO: 15489 Standard)



27 - 31 December 2009, Dubai  
28 March - 01 April 2010, Dubai  
25 - 29 July 2010, Dubai  
12 - 16 December 2010, Dubai

*Participants attending the programme will able to:*

- Understand document and records management lifecycle
- Help create business case and requirements for the selection and procurement of document and records management
- Create a document and records management plan of action
- Learn about legislation, standards and regulation
- Set up search and retrieval



# Documents & Records Management Compliance (ISO: 15489 Standard)

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## INTRODUCTION

Managing documents, records and content can be difficult. How do you best capture, manage and store the documents and records in your organisation? Does your approach meet compliance requirements, regulations and standards? What is the best way to manage emails, web pages and electronic documents and records? How do you find the right documents and records when you need them? How does workflow and business process management work with documents and records management to help increase efficiency within your company? ISO 15489 is the international standard for records management. It is about attaining a records management benchmark of best practice, setting up methodology, processes and the resulting data storage and using an electronic records management system.

This programme covers the strategies, tools, and technologies used to capture, categorise, manage, store, preserve (archive), and deliver documents and records in support of business processes. This programme also covers the the core components of ISO 15489 so that organisations become compliant with best practices.

### *In this programme you will learn how to:*

- ♦ Understand the key concepts and overall architectural scope
- ♦ Develop business cases and business requirements
- ♦ Use the concepts of document and records management to deliver business drivers
- ♦ Link how document and records management can be implemented across your organisation
- ♦ Explore the implications of an Enterprise Content Management (ECM) strategy in conjunction with document and records management
- ♦ Understand the key concepts and overall scope of ISO 15489 and how to apply ISO 15489 in your organisation

## WHO SHOULD ATTEND

This programme will prove to be a useful and productive for all those who are interested in understanding document and records management and how it can be implemented successfully.

### *It will be of benefit to:*

- ♦ Document and Records Management personnel
- ♦ Document Management Supervisors
- ♦ Suppliers, Solution Providers and Vendors
- ♦ Executives
- ♦ Users of Document and Records Management
- ♦ Personnel seeking to enhance their skills
- ♦ IT Management
- ♦ Technical staff

## PROGRAMME OBJECTIVES

- ♦ To understand document and records management lifecycle
- ♦ To understand ISO 15489 records management standard
- ♦ Review how to implement a records management system based on ISO 15489
- ♦ Help create business case and requirements for the selection and procurement of document and records management
- ♦ Create a document and records management plan of action to implement in their organization and learn from best practice implementations and case studies
- ♦ Concepts for managing information and content, such workflow, business process and collaboration
- ♦ Review industry leading solutions and vendors in this marketplace
- ♦ Using metadata, business classification scheme, taxonomy and setting retention plans
- ♦ Learn about legislation, standards and regulation
- ♦ Set up search and retrieval
- ♦ Setting up access controls and security
- ♦ Develop storage models, audit trail and storage technologies

## TRAINING METHODOLOGY

Participants will learn by active participation during the programme through the use of a wide variety of instructional techniques. There will be group exercises to allow for a "hands on" approach to learning. Case studies will be utilized to present "best practices" approaches. In addition there will be in depth discussion of critical success factors

## PROGRAMME SUMMARY

This programme covers all the essential skills needed to understand, use and apply document and records management and all the essential skills needed to understand, use and apply ISO 15489 records management standard. There will be discussions on the use of software, best practice implementation as well as applying all the key concepts. The programme will concentrate on the skills required to effectively deploy and maximise the benefit of document and records management as well as manage the outcomes and deliver business benefits. All participants will return to their organizations with a detailed understanding and have developed action plans to implement document and records management successfully in their organisations.

# PROGRAMME OUTLINE

## DAY 1

### *Strategy and understanding key elements*

- ◆ Introduce document and records management
- ◆ ISO 15489 introduction
- ◆ ISO 15489 Part 1 and Part 2 overview
- ◆ Business case and drivers
- ◆ Creating business requirements
- ◆ Managing information assets
- ◆ Understanding the terminology
- ◆ Document and records management strategies
- ◆ Information governance

## DAY 2

### *Concepts and set up components*

- ◆ Document and records lifecycle
- ◆ Capture, store and management
- ◆ Preserve and archive
- ◆ Presentation and delivery
- ◆ Metadata and indexing
- ◆ Classification schemes
- ◆ Searching and retrieving
- ◆ Controls and security
- ◆ Legislation, standards and regulation

## DAY 3

### *Process and delivery*

- ◆ Information audit and survey
- ◆ Business case
- ◆ Business requirements
- ◆ ISO 15489 Part 1
  - How to set ISO 15489 policies and standards
  - Assigning responsibilities and authorities
  - Establishing procedures and guidelines
- ◆ Business classification scheme
- ◆ IT infrastructure details
- ◆ Model office and rollout

## DAY 4

### *Implementation Planning*

- ◆ Implementation planning
- ◆ ISO 25489 Part 2
  - Designing, implementing and administering specialized systems for managing records
  - Integrating records management into business systems and processes
- ◆ Information audit and survey
- ◆ Project and programme planning

## DAY 5

### *Case Studies*

- ◆ Introduction to case studies
- ◆ Group 1 - Strategy
- ◆ Group 2 - Concepts
- ◆ Group 3 - Process
- ◆ Presentations
- ◆ Evaluation and discussion

EuroMaTech is associated with the following Accreditation Bodies:



# Seminar Registration Details

Complete and Mail or fax to EuroMaTech at the address given below.

Please register me on the

## Documents & Records Management Compliance: (ISO: 15489 Standard) Seminar

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### YOUR DETAILS

Name (Mr/Ms): .....

Position: Organisation: .....

Address: .....

.....

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City / Country: .....

Telephone / Fax: .....

### METHOD OF PAYMENT

Please find enclosed a cheque made payable to EuroMaTech

Please invoice me

Please invoice my company as follows:

Contact name: .....

Company name: .....

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### SEMINAR DETAILS

#### Documentation

High Quality material has been prepared by the Seminar Leader for distribution to delegates. In addition a special note pad to facilitate note taking will be provided.

#### Certificates

A Certificate of Attendance will be issued to those who attend and successfully complete the programme.

#### Schedule

08:30 – 09:00 Welcome  
09:00 – 10:45 First Session  
10:45 – 11:00 Coffee Break  
11:00 – 12:45 Second Session  
12:45 – 13:15 Coffee Break  
13:15 – 14:45 Third Session  
14:45 – 15:30 Lunch  
15:30 – 16:30 Open Session

#### Fees

The Fee for the seminar, including instruction materials, documentation, lunch, coffee/tea breaks and snack is: **US\$ 3,850/ = per delegate.**

#### Hotel Accommodation

EuroMaTech has negotiated special rates for a limited number of rooms in the hotel. Early registration will help to secure a room at the reduced rate.

#### Registration & Payment

Please complete the registration form on this page and return it to us together with your cheque made payable to EuroMaTech.

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### EASY WAYS TO REGISTER



Telephone: +971 4 2696886 to provisionally reserve your place.



Fax your completed registration form to: +971 4 2691308



E-mail to us : [info@euromatech.com](mailto:info@euromatech.com)



Complete and return the booking form with cheque to: **EuroMaTech** P.O.Box 28083, Dubai - U.A.E.

### DISCLAIMER

EuroMaTech reserves the right to alter the content, location of the Seminar, or the identity of the speakers in case of events beyond our control.

### CANCELLATION POLICY

Request for seminar cancellation must be made in writing & received at EuroMaTech three weeks prior to the seminar date. A U.S.\$250/- processing fee will be charged per delegate for each cancellation. Thereafter, we regret that we are unable to refund any fees due, although in such cases we would be happy to welcome a colleague who would substitute for you.