KOENIG SOLUTIONS · COURSE OUTLINE

Records Management: ISO 15489 & ECM Strategy

ISO 15489

5 Days	5	35
DURATION	MODULES	TOPICS

COURSE OVERVIEW

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 core components of ISO 15489 so that organisations become compliant with best practices.

WHO THIS COURSE IS FOR

- Records Managers
- Information Governance Officers
- Compliance Officers
- ECM Project Managers
- IT Infrastructure Planners
- Business Analysts

LEARNING OBJECTIVES

What You Will Learn

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
- 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
- Lean about legislation, standards and regulation
- Set up search and retrieval
- Setting up access controls and security
- Develop storage models, audit trail and storage technologies

COURSE SYLLABUS

5 Modules, 35 Topics

DAY 1

01

Strategy and Understanding Key Elements of Documents & Records Management Compliance

TOPICS

- Introduce document and records management
- ISO 15489 Part 1 and Part 2 overview
- Business case and drivers
- Business requirements for managing document and records
- Managing information as an asset
- Understanding the terminology
- Document and records management strategies
- Information governance

DAY 2

02

Concepts and Set Up Components

TOPICS

- Document and records lifecycle
- Capture and storage management
- Storage and handling
- Preservation and archiving
- Metadata and indexing
- Classification schemes
- Searching and retrieving
- Controls and security
- Legislation, standards and regulation

DAY 3

03

Process and Delivery

TOPICS

Information gathering: audit and survey · Building a 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

04

Implementation Planning

TOPICS

- Implementation planning

ISO 15489 PART 2

- Designing, implementing and administering specialized systems for managing records
- Integrating records management into business systems and processes
- **Information audit:** monitoring compliance
- Project and programme planning

DAY 5

05

Case Studies

TOPICS

- Introduction to case studies
- **Group 1 - Strategy:** Developing a business case
- **Group 2 - Concepts:** Training and awareness programme
- **Group 3 - Process:** Developing policy and standards

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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