



INFORMATION & DOCUMENTATION COMPLIANCE

Streamlining Documents in a Digital Age Training Workshop

SANDTON LODGE HOTEL
Corner 12th Avenue and River Road
RIVONIA [Edenburg on GPS]
Johannesburg,
South Africa

**26-30
MAY
2025**

FROM
8:30
TILL **4PM**

REGISTRATIONS FEES

USD2,400

IEA Members

USD2,500

Non IEA Members

FEE INCLUDES

TRAINING MATERIALS
MEALS & REFRESHMENTS DURING THE DAY
AIRPORT PICKUP AND DROP OFF
HOTEL PICKUP AND DROP OFF
DELEGATE LAPTOP
½ DAY TOUR TO TOURIST ATTRACTION SITES

FEE EXCLUDES

DINNER AND ACCOMMODATION

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INTRODUCTION

Information and Documentation Compliance course covers advanced strategies, tools, and technologies used to capture, categorize, manage, store, preserve (archive), and deliver vital information and documentation compliance in support of business processes, in accordance to key ISO standards such as ISO9001, ISO15489 (Records Management) and ISO27001 (Information Security). As the companies and institutions face the ever-growing number of documents, records and files they are dealing with, and more and more the documents are records are only considered in their electronic form, the data management, compliance and security become a vital element of the enterprise content management system (ECM).

There are growing legal, audit and compliance requirements and issues for managing vital business documentation, records and information. Business documentation like contracts, financial records, project information and signed paper hardcopy documents are growing massively each year for all businesses and organizations.

WHAT YOU WILL LEARN?

- Understand advanced information and documentation management policies
- Understand procedures and standards including ISO15489, ISO9001 and ISO27001
- Develop key strategies for meeting compliance, legal and audit requirements
- Create records management business tools like electronic file plan, retention and disposal rules, security rules, archiving, confidentiality and privacy
- Link hardcopy and electronic documentation systems and records management systems and implement across your organization
- Explore the implications of an Enterprise Content Management (ECM) strategy in conjunction with records management and information security

OBJECTIVES

- Understand information and documentation compliance
- Understand regulations, standards and best practice
- Create information and documentation policies, procedures
- Create standards including information security standards
- Create an information and documentation action plan to implement in their organization
- Learn from best practice implementations and case studies
- Learn advanced concepts for managing information and documentation
- Review industry leading solutions and vendors in this marketplace
- Use metadata, business classification scheme, taxonomy and setting retention plan
- Learn how to implement legislation, standards and regulation
- Create advanced policies and procedures
- Set up access controls and security procedures
- Develop storage models, audit trail and storage technologies
- Understand the Data Management Body of Knowledge principles

TRAINING METHODOLOGY

Participants will learn by active participation during this Office Administration training course using 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.

ORGANIZATIONAL IMPACT

By attending this course, the organization and their participants shall learn about regulations, compliance, apply international standards and help improve the organization to become more efficient:

- Expanding the expertise of personnel involved in developing international best practice standards, procedures and policies will allow teams to be more effective via good information, filing and documentation management understanding and applying this in the workplace
- Support the organization to meet ever growing information and document related risk and security regulations, compliance, audit, international and national standards
- The organization shall improve its operational processes, polices and work flows by applying international best practices such as ISO 15489 Records Management and ISO 27001 Information Security
- Learn how good information compliance and document management can help to reduce operational risks, meet compliance and regulations, reduce costs and improve overall efficiency
- Learn about procurement and systems so that the organization can procure the right technical and system solutions and learn how to implement them successfully
- Improve the strategic thinking, planning and strategy for delivering effective information and document management solutions and roadmaps

PERSONAL IMPACT

- Create document control, compliance and audit management for organization wide paper and electronic documents and implement across organization and learn about technology and systems and how to apply them successfully
- Increase recognition of the use of good filing polices, standards, procedures and lifecycle documentation management
- Develop understanding of global regulations, compliance and audit learning from implementing international and national best practices including ISO 15489 Records Management and ISO 27001 Information Security
- Increase working knowledge and gain practical hands on experience of information and document management through exercises, team based working and workshops
- Learn from real world case studies and examples to provide participants more confidence in using filing and documentation systems that are aligned to ISO standards

WHO SHOULD ATTEND?

- Secretaries and Administrators wanting to raise their efficiency levels, improve their effectiveness and develop skills that will help their career-development
- People working in an office role supporting management and/or working in project teams
- Anyone wanting to develop their practical skills and personal strengths to help them succeed in an office environment
- All individuals who wish to improve their leadership skills and develop their personal power and effectiveness:

COURSE OUTLINE

Implementation Planning

- Implementation Planning
- Setting-up Action Plan for Information and Documentation Compliance
- Creating Policies and Procedures
- Creating an Action Plan

IT Process and Delivery

- Review IT Information and Documentation Management Systems
- Review Scanning, Storage and Archiving Systems that meet Compliance
- Scanning and Legal Issues
- Archiving and Retention Requirements
- Digital Signatures and Digital Rights Management

Data Management Compliance and Security

- Data as Basic Asset of the Enterprise
- Management of Data Architecture
- Management of Master and Reference Data
- Management of Data Quality
- Management of Metadata
- Data Security and Warehousing Management

Concepts and Set-up Components

- Compliance, Controls and Security
- Legislation, Standards and Regulation
- Business Classification Scheme and Taxonomy
- Document Control
- Understanding Security and Compliance

Strategy and Understanding Key Elements

- Introduce Information and Documentation Management
- Review Standards, ISO9001, ISO27001 and ISO15489
- Creating Information and Documentation Audit
- Create File Plans, Metadata Plan, Retention Schedule, and other Information Controls

Certificates

On successful completion of this training course, PALGNET Certificate will be awarded to the delegates

Registration Fees

\$2,400

IEA Members

\$2,500

Non IEA Members

Fee Includes

- Training Materials
- Meals & refreshments during the day
- Airport pickup and drop off
- Hotel Pickup and drop off
- Delegate Laptop
- ½ day tour to tourist attraction sites

Fee Excludes

- Dinner and Accommodation



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Welcome to the Sandton Lodge Rivonia, we extend a very warm welcome and trust your upcoming stay or conference with us will be both enjoyable and comfortable.



The Simama Hotels Sandton Lodge Rivonia offers business services and facilities. Our 34 Suites are all strictly non-smoking and have; Air-conditioning and Heating, Tea and Coffee Facilities, DSTV Decoder, a Mini-Bar Fridge (Stocked on request) and complimentary Broadband WIFI Internet Access with Secure on-site Parking available. As part of our continued guest-safety measures and growing international trend, the Sandton Lodge Hotel is a cashless establishment, for your convenience all major Credit and Debit cards are accepted in addition to Snap-Scan and Apple-Pay facilities.