ADVANCED CERTIFICATE

IN DOCUMENT CONTROL AND RECORDS MANAGEMENT

ACDCRM

DESIGNED TO MEET INTERNATIONAL STANDARDS

Records Governance • Information Lifecycle Management • Compliance • Document Control

PROFESSIONAL QUALIFICATION FOR CONTROLLED, SECURE AND COMPLIANT INFORMATION MANAGEMENT

COURSE BROCHURE

Course Overview

The Advanced Certificate in Document Control and Records Management (ACDCRM) is a professional qualification designed to equip participants with advanced knowledge, practical skills, and competencies required to manage documents, records, information, and organizational knowledge throughout their lifecycle.

The program focuses on document control, records management, information governance, document classification, version control, metadata, retention and disposal, access control, information security, compliance, electronic document management, records preservation, audit readiness, and information lifecycle management.

INTERNATIONAL REFERENCE FRAMEWORK

The curriculum is designed with reference to internationally recognized information and records

management principles associated with ISO 15489, ISO 30301, ISO 9001, GDPR, ARMA, and AIIM.

Course Objectives

- Understand advanced principles of document control, records management, and information governance.
- Establish effective document and records management policies, procedures, and controls.
- Design document classification, indexing, naming, coding, and filing systems.
- Apply effective document identification, version control, revision, approval, and distribution processes.
- Manage the complete information lifecycle from creation and capture through retention and final disposition.
- Develop and implement records retention and disposition schedules.
- Apply metadata, indexing, tagging, and information retrieval principles.
- Manage electronic documents and records within digital and electronic document management environments.
- Apply appropriate access, confidentiality, privacy, and information security controls.

Course Objectives Continued

- Support compliance with legal, regulatory, contractual, and organizational information requirements.
- Apply records preservation and protection principles to ensure authenticity, integrity, reliability, and usability.
- Manage controlled documents within quality management systems and regulated environments.
- Conduct document and records audits and identify gaps, nonconformities, and improvement opportunities.
- Establish effective workflows for document review, approval, distribution, and change management.
- Apply appropriate controls for obsolete, superseded, archived, and confidential information.
- Support business continuity and organizational resilience through effective information management.
- Promote efficient information retrieval, accountability, transparency, and continuous improvement.

Target Group

- Document Controllers
- Document Control Managers
- Records Managers
- Records Officers
- Information Governance Professionals
- Information Management Officers
- Document Management Specialists
- Quality Assurance Professionals
- Quality Management Representatives
- Compliance Officers
- Project Document Controllers
- Engineering Document Controllers
- Construction Document Controllers
- Legal and Corporate Records Personnel
- Administrative and Information Officers
- Knowledge Management Professionals
- Project Managers and Coordinators
- Auditors and Quality Professionals
- Professionals responsible for organizational information governance

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CERTIFICATE AWARD

Certificate Awarded

Participants who successfully complete the program requirements will be awarded the Advanced Certificate in Document Control and Records Management (ACDCRM).

ADVANCED PROFESSIONAL COMPETENCE

The award recognizes advanced competence in document control, records governance, information lifecycle management, classification, version control, metadata, retention and disposition, electronic records management, information security, compliance, auditing, preservation, and controlled information distribution in accordance with recognized international practices.

Programme at a Glance

- 10 comprehensive professional modules
- International standards and governance focus
- Document control and records lifecycle coverage
- Electronic records and digital transformation

MODULE 1: FOUNDATIONS OF DOCUMENT CONTROL & RECORDS MANAGEMENT

MODULE CONTENT

- 1.1 Definitions: Documents, Records, Metadata, Information Assets
- 1.2 Principles of Records Governance
- 1.3 Document Controller Roles & Responsibilities
- 1.4 Information Lifecycle Management
- 1.5 International Standards (ISO 15489, ISO 30301)
- 1.6 Organizational Requirements for Document Control

REFERENCE

Records and Information Management – Patricia C. Franks

MODULE 2: DOCUMENT CONTROL SYSTEMS, PROCESSES & PROCEDURES

MODULE CONTENT

- 2.1 Document Numbering & Coding Systems
- 2.2 Version Control & Revision Management
- 2.3 Document Distribution & Retrieval
- 2.4 Controlled Documents vs. Uncontrolled Documents
- 2.5 Document Control Procedures & Manuals
- 2.6 Document Archiving & Retention

REFERENCE

Document Control: Principles and Practices – David Berg

MODULE 3: RECORDS CLASSIFICATION, INDEXING & METADATA MANAGEMENT

MODULE CONTENT

- 3.1 Records Classification Systems
- 3.2 File Plan Development
- 3.3 Metadata Standards & Tagging
- 3.4 Indexing Techniques for Fast Retrieval
- 3.5 Taxonomy & Information Architecture
- 3.6 Managing Large Volumes of Records

REFERENCE

Managing Records: A Handbook of Principles and Practice

MODULE 4: ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (EDMS) & DIGITAL TRANSFORMATION

MODULE CONTENT

- 4.1 EDMS Features & Architecture
- 4.2 Workflow Automation & Approval Routing
- 4.3 Digital Signatures & Authentication
- 4.4 Cloud Storage & Information Security
- 4.5 Migration from Paper to Digital Systems
- 4.6 Selecting & Implementing EDMS Solutions

REFERENCE

Electronic Records Management – Julie McLeod

MODULE 5: COMPLIANCE, LEGAL REQUIREMENTS & INFORMATION GOVERNANCE

MODULE CONTENT

- 5.1 ISO 15489 Compliance Requirements
- 5.2 GDPR & Data Protection Regulations
- 5.3 Freedom of Information (FOI) & Access Rights
- 5.4 Audit Trails & Accountability
- 5.5 Legal Holds & Litigation Support
- 5.6 Information Governance Frameworks

REFERENCE

Information Governance: Concepts, Strategies, and Best Practices – Robert F. Smallwood

MODULE 6: RECORDS RETENTION, ARCHIVING & DISPOSITION

MODULE CONTENT

- 6.1 Retention Schedules & Legal Requirements
- 6.2 Archiving Methods (Physical & Digital)
- 6.3 Long-Term Preservation Techniques
- 6.4 Disposition & Secure Destruction
- 6.5 Managing Vital Records
- 6.6 Disaster Recovery for Records

REFERENCE

Archives: Principles and Practices – Laura Millar

MODULE 7: DOCUMENT CONTROL IN PROJECTS, ENGINEERING & CONSTRUCTION

MODULE CONTENT

- 7.1 Project Document Control Requirements
- 7.2 Engineering Drawings & Technical Documents
- 7.3 Transmittals, Submittals & RFIs
- 7.4 Revision Control for Technical Projects
- 7.5 Contractor Document Management
- 7.6 Project Close-Out Documentation

REFERENCE

Engineering Documentation Control Practices – Frank Watts

MODULE 8: QUALITY MANAGEMENT, AUDITS & ISO 9001 DOCUMENTATION

MODULE CONTENT

- 8.1 Quality Documentation Requirements
- 8.2 Documented Information in ISO 9001
- 8.3 Audit Preparation & Compliance Checks
- 8.4 Non-Conformance Documentation
- 8.5 Corrective & Preventive Actions (CAPA)
- 8.6 Continuous Improvement in Document Control

REFERENCE

ISO 9001: Quality Management Systems – Nigel Croft

MODULE 9: INFORMATION SECURITY, RISK MANAGEMENT & CONFIDENTIALITY

MODULE CONTENT

- 9.1 Information Security Principles (ISO 27001)
- 9.2 Access Control & Permission Management
- 9.3 Risk Assessment for Information Assets
- 9.4 Secure Storage & Encryption
- 9.5 Handling Confidential & Sensitive Records
- 9.6 Cybersecurity Awareness for Document Controllers

REFERENCE

Information Security Management Handbook – Harold F. Tipton

MODULE 10: LEADERSHIP, COMMUNICATION & PROFESSIONAL PRACTICE IN DOCUMENT CONTROL

MODULE CONTENT

- 10.1 Communication Skills for Document Controllers
- 10.2 Managing Stakeholders & Departments
- 10.3 Training & Competency Development
- 10.4 Team Coordination & Workload Management
- 10.5 Ethical & Professional Conduct
- 10.6 Building a High-Performance Document Control Function

REFERENCE

The Effective Records Manager – Geoffrey Yeo

Build a High-Performance Document Control Function

The ACDCRM programme brings together records governance, information lifecycle management, controlled document processes, digital transformation, legal compliance, retention, project documentation, quality management, information security, and professional leadership.

CORE LEARNING THEMES

Governance • Classification • Version Control • Metadata • EDMS • Compliance • Retention • Project Documents • ISO 9001 • Information Security • Leadership

Qualification

ADVANCED CERTIFICATE IN DOCUMENT CONTROL AND RECORDS MANAGEMENT (ACDCRM)

Awarded to participants who successfully complete the programme requirements.

PROFESSIONAL TRAINING FOR CONTROLLED INFORMATION

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