



*Training Course:
Records Management and Electronic
Documentation*

*31 August - 11 September 2026
Cape Town (South Africa)
DoubleTree by Hilton Cape Town - Upper Eastside*

Training Course: Records Management and Electronic Documentation

Training Course code: OM236550 From: 31 August - 11 September 2026 Venue: Cape Town (South Africa) - DoubleTree by Hilton Cape Town - Upper Eastside Training Course Fees: 9700 € Euro

Introduction

Effective records management and electronic documentation are essential components of modern organizations seeking operational efficiency, regulatory compliance, and secure information governance. As organizations increasingly transition from paper-based systems to digital environments, the ability to create, organize, store, retrieve, and preserve records electronically has become a strategic necessity.

Records Management and Electronic Documentation, designed by Global Horizon Training Center, provides participants with practical knowledge and internationally recognized best practices for managing physical and digital records throughout their lifecycle. The program addresses records classification, indexing, retention schedules, electronic document management systems EDMS, digital archiving, information security, legal compliance, and emerging technologies supporting records governance. Participants will gain the skills needed to establish efficient documentation systems that improve accessibility, support decision-making, and ensure organizational continuity.

Objectives

By the end of this program, participants will be able to:

- Understand the principles and standards of records management and electronic documentation.
- Apply records lifecycle management methodologies.
- Develop records classification and filing systems.
- Establish retention and disposition schedules.
- Implement electronic document management systems EDMS.
- Ensure information security and confidentiality of records.
- Manage digital archives and long-term preservation processes.
- Improve records retrieval and information accessibility.
- Ensure compliance with legal and regulatory requirements.
- Utilize modern technologies and automation tools in document management.

Course Methodology

This highly interactive program combines:

- Expert-led presentations and discussions.
- Practical workshops and hands-on exercises.
- Case studies on records management practices.
- Group activities and problem-solving sessions.
- Demonstrations of electronic document management systems.
- Templates and best-practice frameworks.
- Real-world applications and implementation scenarios.
- Interactive assessments and feedback sessions.

Organizational Impact

Upon completion of this program, organizations will benefit from:

- Improved efficiency in records storage and retrieval.
- Reduced operational costs associated with paper-based processes.
- Enhanced information security and confidentiality.
- Better compliance with regulatory and legal requirements.
- Increased productivity through digital transformation.
- Reduced risks of information loss and duplication.
- Strengthened business continuity and knowledge preservation.
- Faster decision-making through improved information accessibility.
- Enhanced governance and accountability.
- Greater organizational readiness for digital initiatives.

Target Audience

This program is designed for:

- Records Managers and Archivists.
- Administrative and Office Managers.
- Document Controllers.

- Information Management Professionals.
- Compliance and Governance Officers.
- Quality Assurance Personnel.
- IT and Digital Transformation Specialists.
- Human Resources and Administrative Staff.
- Legal and Regulatory Affairs Personnel.
- Anyone responsible for creating, managing, or preserving organizational records.

Outlines

Day 1: Fundamentals of Records Management

- Importance of records management in organizations.
- Types and categories of records.
- Records lifecycle concepts.
- International standards and best practices.
- Roles and responsibilities in records management.
- Challenges in managing organizational information.

Day 2: Records Classification and Filing Systems

- Principles of records classification.
- Designing classification schemes.
- Indexing and metadata concepts.
- Numbering and coding systems.
- File structures and naming conventions.
- Practical exercises on records organization.

Day 3: Records Retention and Disposition Management

- Records retention schedules.
- Legal and regulatory requirements.

- Records appraisal methods.
- Archiving versus destruction.
- Secure disposal procedures.
- Developing retention policies.

Day 4: Electronic Document Management Systems EDMS

- Introduction to EDMS concepts.
- Components and architecture of EDMS.
- Document capture and digitization.
- Workflow management and automation.
- Version control and document tracking.
- Selecting appropriate EDMS solutions.

Day 5: Digital Archiving and Preservation

- Digital preservation principles.
- Archiving strategies and techniques.
- Backup and recovery procedures.
- Long-term storage solutions.
- Migration and format management.
- Disaster recovery considerations.

Day 6: Information Security and Confidentiality

- Information security principles.
- Access control and authorization.
- Data privacy and confidentiality requirements.
- Risk assessment and mitigation.
- Encryption and secure storage practices.
- Cybersecurity considerations in document management.

Day 7: Compliance, Governance, and Legal Requirements

- Information governance frameworks.
- Regulatory and industry standards.
- Records management policies and procedures.
- Audit trails and accountability.
- Managing legal and evidential records.
- Compliance monitoring techniques.

Day 8: Document Digitization and Workflow Automation

- Scanning and digitization processes.
- Optical Character Recognition OCR technologies.
- Workflow design and process automation.
- Electronic signatures and approvals.
- Integration with enterprise systems.
- Improving operational efficiency.

Day 9: Emerging Technologies in Records Management

- Artificial Intelligence applications in document management.
- Cloud-based document management solutions.
- Big data and analytics for records management.
- Blockchain applications in records authenticity.
- Automation and robotic process technologies.
- Future trends in digital information management.

Day 10: Developing an Integrated Records Management Framework

- Assessing organizational records management maturity.
- Designing records management policies.

- Building a records governance framework.
- Key performance indicators KPIs for records management.
- Change management and implementation strategies.
- Final workshop: Developing a records management and electronic documentation improvement plan.

Registration form on the Training Course: Records Management and Electronic Documentation

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