

ADVANCED COURSE ON DOCUMENT MANAGEMENT AND ELECTRONIC ARCHIVING



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TRAINING CENTER



Introduction

Organizations generate far more documents than most can control, and the consequences show up in audits, disputes, and wasted search time. Good document management turns a liability into an asset that supports decisions and proves compliance. This Advanced Course on Document Management and Electronic Archiving Training Course gives participants a complete system for classifying, storing, protecting, and retrieving records. Furthermore, it covers retention schedules, electronic archive design, metadata standards, scanning and digitization workflows, and legal admissibility requirements. Participants also learn to plan a transition from paper to digital archives. As a result, they leave able to build a records system their organization can rely on.

Advanced Course on Document Management and Electronic Archiving Course Objectives

- Apply records management principles across the document lifecycle.
- Build classification schemes and taxonomies for consistent filing.
- Design retention and disposal schedules with legal justification.
- Implement metadata standards for searchable electronic archives.
- Plan scanning and digitization workflows with quality controls.
- Apply document control for versioning, approval, and audit trails.
- Protect records with access controls, encryption, and backup practices.
- Meet legal admissibility and evidential requirements for records.
- Align document management with ISO 15489 and ISO 30301 guidance.
- Evaluate and select electronic document management systems (EDMS).

Course Methodology

- Interactive workshops built around real document collections.

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- Guided design of classification schemes and retention schedules.
- Metadata and indexing practice using structured templates.
- Scanning, digitization, and quality-check simulations.
- Case studies from government, healthcare, legal, and corporate settings.
- Action planning that links each practice to the participant's own records.

Who Should Take This Course

- Records and document management officers.
- Archivists and information management specialists.
- Administrative and office managers handling records.
- Compliance, legal, and audit support staff.
- IT staff implementing document management systems.
- Employees responsible for filing, scanning, or archiving duties.

Advanced Course on Document Management and Electronic Archiving Course Outlines

Day 1: Foundations of Records and Document Management

- Defining records, documents, and information assets.
- Explaining the document lifecycle from creation to disposal.
- Applying ISO 15489 and ISO 30301 principles.
- Understanding legal, fiscal, and operational retention needs.
- Identifying risks of poor records management.



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- Assessing current records maturity.
- Completing a personal records management audit.

Day 2: Classification, Indexing, and Metadata

- Building file plans and classification schemes.
- Designing taxonomies and naming conventions.
- Applying metadata standards for searchability.
- Indexing documents with consistent keywords and attributes.
- Applying document control for versions and approvals.
- Managing access permissions and confidentiality levels.
- Drafting a classification and metadata scheme.

Day 3: Retention, Disposal, and Compliance

- Designing retention schedules by record type.
- Applying legal hold and litigation preservation requirements.
- Planning secure disposal and destruction methods.
- Meeting audit and regulatory evidence requirements.
- Managing confidential and personal data obligations.
- Documenting retention decisions and approvals.
- Building a retention schedule.

Day 4: Digitization and Electronic Archiving

- Planning scanning projects with quality benchmarks.
- Applying OCR, image quality, and resolution standards.
- Designing electronic archive structures and repositories.





- Ensuring legal admissibility of digitized records.
- Applying backup, redundancy, and disaster recovery practices.
- Managing hybrid paper and digital environments.
- Reviewing a digitization workflow.

Day 5: Systems, Security, and Continuous Improvement

- Evaluating EDMS and archive software options.
- Applying access control, encryption, and audit trails.
- Meeting information security and data protection requirements.
- Training staff and building records discipline.
- Measuring records performance with retrieval and accuracy metrics.
- Reviewing the system and planning improvements.
- Preparing a 90-day document management action plan.

Conclusion

By successfully completing Advanced Course on Document Management and Electronic Archiving, participants will gain the knowledge to classify records, design retention schedules, and build secure electronic archives that meet legal and operational needs. They will acquire skills in records classification, retention and compliance, digitization, and archive system management that strengthen control and audit readiness. Gentex Training Center builds this course around real document collections, so learners return ready to manage records with order, security, and legal confidence.



FAQs

Q1 What is the "Advanced Course on Document Management and Electronic Archiving" course about?

It teaches how to manage records through their full lifecycle and build reliable electronic archives. The course covers classification and metadata, retention and disposal, digitization and scanning, document control, archive security, legal admissibility, and electronic document management systems.

Q2 What are the key benefits of the "Advanced Course on Document Management and Electronic Archiving" course?

Participants reduce time lost searching for documents, keep records legally defensible, and pass audits with less effort. They also protect confidential information properly, manage storage costs through planned disposal, and build an archive that stays usable as volumes grow.

Q3 What skills will I gain from the "Advanced Course on Document Management and Electronic Archiving" course?

You will gain records classification and metadata design, retention and compliance management, digitization and electronic archiving, and archive security and system management. These four skills work together to give an organization full control over its records.



Q4 What tools, methods, or standards are covered in the "Advanced Course on Document Management and Electronic Archiving" course?

The course covers ISO 15489 records management and ISO 30301 management system guidance, file plans and classification schemes, taxonomy and naming conventions, metadata standards, retention and disposal schedules, legal hold procedures, OCR and scanning quality benchmarks, legal admissibility requirements, access control and encryption, audit trails, disaster recovery practices, and EDMS evaluation criteria.

Q5 How is the "Advanced Course on Document Management and Electronic Archiving" course applied in real-world practice?

Participants build a classification scheme and retention schedule for their own record types, design and test a digitization workflow, and evaluate an archive repository structure. They also apply access control and audit trail practices and complete a 90-day plan for improving their records system.