

DOCUMENT MANAGEMENT AND ELECTRONIC ARCHIVING: TRANSITION FROM PAPER TO ELECTRONIC RECORDS



GENTEX[®]
TRAINING CENTER



Introduction

Moving from paper to electronic records is not a scanning project; it is a change programme that touches filing rules, staff habits, legal evidence, and system design at the same time. Organizations that treat it as a technical exercise end up with unsearchable scans and two parallel filing systems. This Document Management and Electronic Archiving: Transition from Paper to Electronic Records Training Course gives participants a staged method for that transition. Furthermore, it covers migration planning, digitization quality, metadata, retention, legal admissibility, and staff adoption. As a result, they leave able to run a paper-to-digital records transition that holds up over time.

Document Management and Electronic Archiving: Transition from Paper to Electronic Records Course Objectives

- Assess current paper and digital records environments accurately.
- Build a transition roadmap with phases, owners, and milestones.
- Design classification, naming, and metadata standards for the target system.
- Plan scanning and digitization with quality and validation controls.
- Apply document control for versions, approvals, and audit trails.
- Set retention and disposal rules that work in a hybrid environment.
- Ensure legal admissibility and evidence integrity for converted records.
- Select and configure EDMS platforms to fit organizational needs.
- Manage migration, data validation, and legacy system decommissioning.
- Drive staff adoption through training and change management.

Course Methodology



LEARN BOLD. LEAD BEYOND

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com



- Interactive workshops built around real records environments.
- Guided roadmap, classification, and metadata design exercises.
- Scanning, validation, and migration simulations.
- Role-play for staff resistance and change communication.
- Case studies of successful and failed digitization programmes.
- Action planning that links each phase to the participant's own records.

Who Should Take This Course

- Records, archives, and documentation managers.
- Administrative and office managers leading digitization work.
- Project managers running records transition programmes.
- IT staff implementing EDMS and archive platforms.
- Compliance, legal, and audit support staff.
- Archivists and information governance specialists.

Document Management and Electronic Archiving: Transition from Paper to Electronic Records Course Outlines

Day 1: Assessing the Current Records Environment

- Inventorying paper collections, volumes, and locations.
- Auditing existing digital filing and storage practices.
- Identifying duplicate, missing, and non-conforming records.
- Assessing legal, fiscal, and operational retention obligations.



LEARN BOLD. LEAD BEYOND

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com



- Evaluating staff capability and system readiness.
- Identifying risks and priority areas for transition.
- Completing a records transition readiness assessment.

Day 2: Designing the Target Records System

- Building classification schemes and file plans for the target system.
- Designing naming conventions and metadata standards.
- Defining access levels, confidentiality, and permission models.
- Applying ISO 15489 and ISO 30301 principles to system design.
- Setting retention and disposal rules for hybrid environments.
- Defining document control for versions and approvals.
- Drafting a target system design outline.

Day 3: Digitization, Quality, and Legal Validity

- Planning scanning projects with volume and quality benchmarks.
- Applying OCR, resolution, and image quality standards.
- Building validation and quality-check procedures.
- Ensuring legal admissibility of digitized records.
- Managing physical records during and after digitization.
- Applying storage, shelving, and environmental controls.
- Reviewing a digitization and validation workflow.

Day 4: Migration, Systems, and Data Integrity

- Selecting and configuring EDMS and archive platforms.
- Planning migration waves and sequencing priorities.



LEARN BOLD. LEAD BEYOND

GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com



- Validating converted data and testing retrieval.
- Managing legacy systems and decommissioning.
- Applying backup, redundancy, and disaster recovery safeguards.
- Meeting information security and data protection requirements.
- Reviewing a migration and validation plan.

Day 5: Adoption, Governance, and Sustained Transition

- Building change management and communication plans.
- Training staff and embedding new filing discipline.
- Setting governance roles and accountability with RACI.
- Auditing the new system and self-checking compliance.
- Measuring performance with retrieval, accuracy, and adoption metrics.
- Reviewing progress and planning further improvements.
- Preparing a 90-day records transition action plan.

Conclusion

By successfully completing Document Management and Electronic Archiving: Transition from Paper to Electronic Records, participants will gain the knowledge to plan a staged records transition, design digital filing standards, and migrate records without losing evidence or control. They will acquire skills in transition planning, records system design, digitization and migration control, and adoption and governance that make a paper-to-digital move successful. Gentex Training Center builds this course around real records environments, so learners return ready to modernize their archives with confidence.





FAQs

Q1 What is the "Document Management and Electronic Archiving: Transition from Paper to Electronic Records" course about?

It covers how to move an organization from paper filings to reliable electronic records. The course addresses current-state assessment, target system design, classification and metadata, digitization quality, migration and validation, legal admissibility, and staff adoption.

Q2 What are the key benefits of the "Document Management and Electronic Archiving: Transition from Paper to Electronic Records" course?

Participants plan transitions that avoid duplicate filing systems, keep records legally defensible after conversion, and migrate data without loss. They also improve retrieval speed, reduce storage cost deliberately, and manage staff resistance so the new system is actually used.

Q3 What skills will I gain from the "Document Management and Electronic Archiving: Transition from Paper to Electronic Records" course?



You will gain records environment assessment and transition planning, records system and metadata design, digitization and migration control, and adoption, governance and performance measurement. These four skills work together to deliver a paper-to-digital records transition that lasts.

Q4 What tools, methods, or standards are covered in the "Document Management and Electronic Archiving: Transition from Paper to Electronic Records" course?

The course covers records inventory and readiness assessment, transition roadmaps with phase milestones, ISO 15489 and ISO 30301 principles, classification schemes and file plans, naming conventions and metadata standards, permission and confidentiality models, retention and disposal schedules, document control for versioning and approvals, OCR and scanning quality benchmarks, validation and retrieval testing, EDMS selection and configuration, backup and disaster recovery practices, RACI governance matrices, and retrieval, accuracy and adoption metrics.

Q5 How is the "Document Management and Electronic Archiving: Transition from Paper to Electronic Records" course applied in real-world practice?

Participants assess their own paper and digital records environment, design a target classification and metadata standard, and build a transition roadmap with phases and owners. They also test a digitization and validation workflow, plan a migration and adoption approach, and complete a 90-day records transition action plan.