

DOCUMENT MANAGEMENT SYSTEM



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Introduction

A document management system only delivers value when the rules behind it are sound. Software cannot decide what to keep, who may approve a revision, or which version is authoritative people must define those choices first. This Document Management System Training Course gives participants the framework and the configuration thinking to build a system that works. Furthermore, it covers classification, metadata, version control, workflow design, permissions, digitization, retention, and audit readiness. Participants also learn to select and configure an EDMS platform to fit real organizational needs. As a result, they leave able to design and run a document management system that holds up under audit.

Document Management System Course Objectives

- Define the requirements a document management system must satisfy.
- Build classification schemes, numbering, and metadata structures.
- Design version control with status codes and approval states.
- Configure access permissions, roles, and confidentiality levels.
- Design approval workflows and routing rules in an EDMS.
- Apply ISO 9001 and ISO 15489 requirements to system design.
- Plan digitization, import, and data migration into the system.
- Set retention, disposal, and legal hold rules inside the system.
- Test, audit, and validate the system against requirements.
- Measure system performance with retrieval, accuracy, and adoption indicators.

Course Methodology

- Interactive workshops built around real document environments.
- Guided requirements definition and system design exercises.
- Metadata, workflow, and permission configuration practice.

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- Migration and validation simulations with test data sets.
- Case studies of successful and failed system implementations.
- Action planning that links each design choice to the participant's own system.

Who Should Take This Course

- Document and records managers and controllers.
- Administrative and office managers implementing document systems.
- EDMS administrators and system owners.
- Quality, compliance, and audit professionals.
- Project managers running document system implementations.
- IT staff supporting document management platforms.

Document Management System Course Outlines

Day 1: Requirements and System Foundations

- Defining document management system scope and objectives.
- Gathering user, legal, and audit requirements.
- Applying ISO 9001 documented information and ISO 15489 principles.
- Mapping the document lifecycle inside the system.
- Identifying risks of poorly specified systems.
- Assessing current document environment maturity.
- Completing a systems requirements checklist.

Day 2: Classification, Metadata, and Version Control

- Designing classification schemes and file plans in the system.



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- Building numbering rules and naming conventions.
- Defining metadata fields, mandatory attributes, and indexes.
- Designing version control with status codes and revision history.
- Managing draft, approved, superseded, and voided states.
- Preventing duplicate and orphaned records.
- Drafting a metadata and version control specification.

Day 3: Workflows, Permissions, and Security

- Designing approval and review workflows with routing rules.
- Applying delegation, escalation, and reminder settings.
- Configuring user roles, permissions, and access levels.
- Applying confidentiality classifications and need-to-know access.
- Managing audit trails, logging, and evidence capture.
- Meeting information security and data protection requirements.
- Drafting a workflow and permissions specification.

Day 4: Import, Migration, and Digitization

- Planning scanning and import into the document system.
- Applying OCR, resolution, and index validation standards.
- Designing bulk import structures and metadata mapping.
- Validating migrated data and testing retrieval accuracy.
- Managing legacy systems and decommissioning.
- Applying backup, redundancy, and disaster recovery safeguards.
- Reviewing a migration and validation plan.





Day 5: Retention, Testing, and Continuous Improvement

- Configuring retention, disposal, and legal hold rules.
- Testing workflows and controls against requirements.
- Auditing the system and documenting evidence.
- Training users and building adoption discipline.
- Measuring performance with retrieval, accuracy, and adoption indicators.
- Reviewing system performance and planning improvements.
- Preparing a 90-day document management system action plan.

Conclusion

By successfully completing Document Management System, participants will gain the knowledge to specify, design, and configure a document management system around sound classification, version control, permissions, and retention rules. They will acquire skills in requirements definition, metadata and version control design, workflow and security configuration, and migration and system auditing that turn software into working control. Gentex Training Center builds this course around real document environments, so learners return ready to implement a system their organization can rely on.

FAQs



Q1 What is the "Document Management System" course about?

It covers how to specify and configure a document management system that actually controls documents. The course addresses requirements definition, classification and metadata, version control, workflow and permission design, digitization and migration, retention rules, and system testing and auditing.

Q2 What are the key benefits of the "Document Management System" course?

Participants define requirements before purchasing or configuring, so the system fits real legal and audit needs. They also prevent duplicate and outdated records, control access properly, migrate data without loss, and prove system compliance during audits with documented evidence.

Q3 What skills will I gain from the "Document Management System" course?

You will gain requirements definition and system design, metadata and version control design, workflow and security configuration, and migration control and system auditing. These four skills work together to turn document management software into dependable governance of documents.



Q4 What tools, methods, or standards are covered in the "Document Management System" course?

The course covers ISO 9001 documented information requirements, ISO 15489 records management principles, classification schemes and file plans, numbering and naming conventions, metadata fields and index design, version control with status codes and revision history, approval and review workflow design, role and permission configuration, confidentiality classifications, audit trails and logging, OCR and scanning quality standards, bulk import and metadata mapping, retention, disposal and legal hold rules, backup and disaster recovery practices, and retrieval, accuracy and adoption indicators.

Q5 How is the "Document Management System" course applied in real-world practice?

Participants write a requirements checklist for their own system, design a metadata and version control specification, and configure a workflow and permission structure. They also plan and validate a migration, test controls against requirements, and complete a 90-day plan for implementing or improving their document management system.