

INDEXING, ADVANCED DIGITAL ARCHIVING & DOCUMENT MANAGEMENT



GENTEX[®]
TRAINING CENTER



Introduction

Every organisation creates records faster than it can organise them, and poorly managed documents cost time, money, and legal protection. The Indexing, Advanced Digital Archiving & Document Management Training Course equips records officers and information managers to bring order to that flow. Participants learn to classify, index, and retrieve records using controlled vocabularies, metadata standards, and enterprise content management systems. Furthermore, the course covers digitisation workflows, scanning quality, retention schedules, and legal compliance for both physical and electronic archives. In addition, it addresses digital preservation risks such as format obsolescence and data loss. As a result, teams gain faster retrieval, stronger governance, and a records system that stands up to audit.

Indexing, Advanced Digital Archiving & Document Management Course Objectives

- Apply ISO 15489 records management principles to organisational document systems.
- Build classification schemes, file plans, and controlled vocabularies for indexing.
- Assign descriptive metadata using Dublin Core and ISAD(G) standards.
- Configure enterprise content management systems for indexing and search.
- Design digitisation workflows for scanning, OCR, and quality control.
- Set retention and disposal schedules aligned with legal and regulatory requirements.
- Implement digital preservation strategies against format obsolescence.
- Apply information security and access control to archived records.
- Manage electronic document and records management systems (EDRMS) day to day.
- Audit records systems and report compliance to management.

Course Methodology



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Info@gentextraining.com



- Instructor-led sessions combining records theory with system practice.
- Hands-on indexing and metadata tagging exercises on sample document sets.
- Guided configuration labs in an enterprise content management environment.
- Case studies on retention, litigation, and archival compliance failures.
- Group workshops to build a file plan and retention schedule.
- Continuous knowledge checks and a final applied indexing project.

Who Should Take This Course

- Records managers and archivists.
- Document control officers and information managers.
- Administrative and office supervisors handling corporate records.
- Compliance officers responsible for record retention.
- Librarians and knowledge management specialists.
- IT staff supporting document management platforms.

Indexing, Advanced Digital Archiving & Document Management Course Outlines

Day 1: Records Management Foundations

- Records lifecycle: creation, capture, use, retention, and disposal.
- ISO 15489 records management principles and governance.
- Legal, regulatory, and audit requirements for records.
- Roles and responsibilities in a records programme.
- Paper versus electronic records and hybrid systems.
- Records policy, procedure, and file plan structure.



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- Workshop: assessing a records system's current gaps.

Day 2: Indexing, Classification, and Metadata

- Classification schemes and hierarchical file plans.
- Controlled vocabularies, thesauri, and naming conventions.
- Indexing principles: subject, author, date, and function.
- Metadata schemas: Dublin Core, ISAD(G), and METS.
- Keyword extraction and full-text indexing techniques.
- Taxonomy design for enterprise search.
- Workshop: indexing a sample document collection.

Day 3: Digitisation and Digital Archiving

- Scanning standards, resolution, and image formats.
- Optical character recognition (OCR) and accuracy validation.
- Digitisation workflow design and quality assurance.
- File naming, folder structures, and version control.
- Storage architecture, backup, and redundancy.
- Migration planning from paper to digital archives.
- Workshop: building a digitisation workflow.

Day 4: Records Management Systems and Security

- Enterprise content management (ECM) and EDRMS platforms.
- Configuring indexing, search, and access permissions.
- Records retention and disposal schedule automation.
- Information security, encryption, and audit trails.





- Digital preservation: format migration and OAIS reference model.
- Business continuity and disaster recovery for archives.
- Workshop: configuring retention rules in a records system.

Day 5: Compliance, Audit, and Continuous Improvement

- Conducting records audits and compliance assessments.
- Reporting records performance to management.
- Handling legal holds, e-discovery, and FOI requests.
- Staff training and records awareness programmes.
- Measuring retrieval speed and records quality KPIs.
- Planning a records management improvement roadmap.
- Workshop: presenting a records improvement plan.

Conclusion

By successfully completing the Indexing, Advanced Digital Archiving & Document Management Training Course, participants will have acquired the knowledge to build classification and indexing systems, apply metadata standards, design digitisation workflows, and manage retention and preservation with confidence. They will also gain the ability to run records audits and support legal and regulatory compliance. Furthermore, the course prepares teams to improve retrieval speed and information governance across the organisation. Gentex Training Center delivers this programme with a strong emphasis on practical, workplace-ready records practice.



FAQs for the Indexing, Advanced Digital Archiving & Document Management course

Q1 What is the "Indexing, Advanced Digital Archiving & Document Management" course about?

It is a practical programme on organising, indexing, and preserving organisational records in both paper and digital form. It covers classification schemes, metadata standards, digitisation, enterprise content management systems, retention schedules, and compliance auditing for archives.

Q2 What are the key benefits of the "Indexing, Advanced Digital Archiving & Document Management" course?

Participants gain faster and more accurate retrieval of documents, stronger compliance with legal retention requirements, and lower risk of losing critical records. The course also reduces storage and paper costs, improves audit readiness, and supports better decision-making through reliable, well-indexed organisational information.

Q3 What skills will I gain from the "Indexing, Advanced Digital Archiving & Document Management" course?

Records classification and indexing design, metadata application with Dublin Core and ISAD(G), digitisation and digital preservation workflows, and records retention, compliance auditing, and information governance.



Q4 What tools, methods, or standards are covered in the "Indexing, Advanced Digital Archiving & Document Management" course?

The course covers ISO 15489 records management, Dublin Core, ISAD(G), and METS metadata standards, the OAIS reference model for digital preservation, optical character recognition (OCR) tools, enterprise content management and EDRMS platforms, retention and disposal schedules, and records audit methodology.

Q5 How is the "Indexing, Advanced Digital Archiving & Document Management" course applied in real-world practice?

Graduates build file plans and taxonomies for their organisations, digitise physical archives with quality controls, and configure retention rules inside their document systems. They also run compliance audits, respond to legal hold and information requests, and train staff on consistent record-keeping practice.