

MODERN SYSTEMS FOR DOCUMENT AND ARCHIVE MANAGEMENT



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TRAINING CENTER



Introduction

Documents move through an organisation constantly, and every weak link in that movement costs time, money, and legal protection. The Modern Systems for Document and Archive Management Training Course prepares records officers, administrators, and information specialists to manage that flow with modern tools and clear rules. Participants learn to build registration systems, apply indexing and metadata standards, run digitisation projects, and control retention and disposal. Furthermore, the course covers electronic document and records management platforms, information security, and audit readiness. In addition, it addresses the transition from paper-heavy offices to digital archives. As a result, teams gain faster retrieval, stronger governance, and archives that remain reliable over time.

Modern Systems for Document and Archive Management Course Objectives

- Apply ISO 15489 records management principles to document systems.
- Build registration, filing, and classification structures for incoming and outgoing documents.
- Apply indexing techniques and metadata standards including Dublin Core and ISAD(G).
- Configure electronic document and records management systems (EDRMS).
- Design digitisation workflows covering scanning, OCR, and quality control.
- Set retention and disposal schedules aligned with legal requirements.
- Operate correspondence registers and document tracking controls.
- Apply access control, confidentiality, and information security practice.
- Manage physical and digital archives including storage and preservation.
- Audit document systems and report compliance performance to management.

Course Methodology



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- Instructor-led sessions combining records theory with practical system work.
- Hands-on exercises in registration, indexing, and metadata tagging.
- Guided labs in an electronic document and records management environment.
- Case studies on retention, litigation, and archival compliance.
- Group workshops to build a file plan, retention schedule, and digitisation plan.
- Continuous knowledge checks and a final applied document management project.

Who Should Take This Course

- Document control and records officers.
- Archivists and information managers.
- Administrative supervisors handling corporate correspondence.
- Compliance officers responsible for record retention.
- Office managers modernising paper-based systems.
- IT staff supporting document management platforms.

Modern Systems for Document and Archive Management Course Outlines

Day 1: Foundations of Document and Archive Management

- Document lifecycle: creation, registration, use, retention, and disposal.
- ISO 15489 records management principles and governance.
- Legal, regulatory, and audit requirements for documents.
- Centralised versus decentralised document systems.



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- Roles and responsibilities in a document control function.
- Document management policy and procedure design.
- Workshop: assessing a current document system's gaps.

Day 2: Registration, Classification, and Indexing

- Registration systems and incoming and outgoing correspondence registers.
- Classification schemes and hierarchical file plans.
- Indexing principles: subject, author, date, and reference number.
- Metadata standards: Dublin Core and ISAD(G).
- Controlled vocabularies, thesauri, and naming conventions.
- Taxonomy design for fast enterprise search.
- Workshop: indexing and registering a document batch.

Day 3: Digitisation and Digital Archiving

- Scanning standards, resolution, and image file formats.
- Optical character recognition (OCR) and accuracy validation.
- Digitisation workflow design and quality assurance.
- File naming, folder structures, and version control.
- Digital storage, backup, and redundancy planning.
- Migration planning from physical archives to digital systems.
- Workshop: building an end-to-end digitisation workflow.

Day 4: Document Management Systems and Security

- Electronic document and records management systems (EDRMS).
- Enterprise content management platforms and configuration basics.



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- Search, indexing, and access permission settings.
- Retention and disposal schedule automation.
- Information security, encryption, and audit trails.
- Digital preservation and the OAIS reference model.
- Workshop: configuring retention rules and access levels.

Day 5: Compliance, Audit, and Continuous Improvement

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

Conclusion

By successfully completing the Modern Systems for Document and Archive Management Training Course, participants will have acquired the knowledge to build registration and classification systems, apply indexing and metadata standards, run digitisation projects, and manage retention, security, and preservation with confidence. They will also gain the ability to audit document systems and support legal and regulatory compliance. Furthermore, the course prepares teams to modernise paper-based offices into reliable digital archives. Gentex Training Center delivers this programme with a strong emphasis on practical, workplace-ready document management practice.





FAQs for the Modern Systems for Document and Archive Management course

Q1 What is the "Modern Systems for Document and Archive Management" course about?

It is a practical programme on managing documents and archives using modern systems and standards. It covers registration and classification, indexing and metadata, digitisation, electronic document and records management platforms, retention schedules, security, and compliance auditing for paper and digital records.

Q2 What are the key benefits of the "Modern Systems for Document and Archive Management" course?

Participants gain faster and more accurate document retrieval, stronger compliance with legal retention rules, and much lower risk of losing critical records. The course also reduces paper and storage costs, improves audit readiness, and gives management reliable, well-organised information for decision-making.

Q3 What skills will I gain from the "Modern Systems for Document and Archive Management" course?

Document registration, classification and indexing; metadata application with Dublin Core and ISAD(G); digitisation and digital archiving workflows; and records retention, document security and compliance auditing.



Q4 What tools, methods, or standards are covered in the "Modern Systems for Document and Archive Management" course?

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

Q5 How is the "Modern Systems for Document and Archive Management" course applied in real-world practice?

Graduates build file plans, registers, 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 holds and information requests, and train staff on consistent document handling.