

PROFESSIONAL ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (EDMS), E-ARCHIVING



GENTEX[®]

TRAINING CENTER



Introduction

Documents drive every decision an organisation makes, yet most offices still store them across scattered folders, shared drives, and paper cabinets. The Professional Electronic Document Management Systems (EDMS), E-Archiving Training Course prepares administrators, records officers, and IT staff to replace that disorder with a controlled digital environment. Participants learn to configure EDMS platforms, design metadata and indexing schemes, and build electronic archives that stay searchable and secure. Furthermore, the course covers digitisation, retention rules, access control, and audit trails. In addition, it addresses integration with existing business applications and compliance with records standards. As a result, teams gain faster retrieval, stronger governance, and documents that remain reliable over time.

Professional Electronic Document Management Systems (EDMS), E-Archiving Course Objectives

- Configure electronic document management systems (EDMS) for organisational needs.
- Design document types, metadata fields, and indexing structures.
- Apply ISO 15489 records management principles to electronic archives.
- Use Dublin Core and ISAD(G) metadata standards for description and retrieval.
- Build digitisation workflows covering scanning, OCR, and quality control.
- Automate retention, disposal, and legal hold rules inside the EDMS.
- Apply access control, version control, and document workflow approvals.
- Integrate EDMS with email, ERP, and line-of-business applications.
- Apply digital preservation and integrity verification using the OAIS model.
- Audit the EDMS and report compliance performance to management.

Course Methodology



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- Instructor-led sessions combining records theory with hands-on platform work.
- Guided configuration labs in a live EDMS environment.
- Practical exercises in metadata design, indexing, and workflow setup.
- Case studies on document loss, compliance failure, and system migration.
- Group workshops to build a file plan, retention schedule, and archive model.
- Continuous knowledge checks and a final applied EDMS project.

Who Should Take This Course

- Document control and records management officers.
- Administrative supervisors managing corporate documents.
- IT staff implementing and supporting EDMS platforms.
- Archivists and information governance specialists.
- Compliance officers responsible for record retention.
- Office managers modernising paper-based filing systems.

Professional Electronic Document Management Systems (EDMS), E-Archiving Course Outlines

Day 1: EDMS Fundamentals and Architecture

- Electronic document management concepts and business benefits.
- Core EDMS components: repository, index, workflow, and security.
- On-premise versus cloud and hybrid deployment models.
- ISO 15489 records management principles and governance.
- Comparison of EDMS, ECM, and EDRMS platform categories.
- Roles, permissions, and administrative structure design.



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- Workshop: assessing readiness for an EDMS implementation.

Day 2: Document Types, Metadata, and Indexing

- Designing document types, templates, and classification schemes.
- Metadata field design using Dublin Core and ISAD(G).
- Controlled vocabularies, taxonomies, and naming conventions.
- Indexing strategies for fast and accurate retrieval.
- Version control, check-in and check-out, and revision history.
- Full-text search configuration and search result tuning.
- Workshop: building a metadata and indexing scheme.

Day 3: Digitisation and Electronic Archiving

- Scanning standards, resolution, and file format selection.
- Optical character recognition (OCR) and accuracy validation.
- Digitisation workflow design and quality assurance.
- Storage architecture, backup, and replication for archives.
- Digital preservation and the OAIS reference model.
- Integrity verification using checksums and fixity checks.
- Workshop: designing an end-to-end digitisation workflow.

Day 4: Workflow, Security, and Integration

- Document workflow design and approval routing.
- Retention, disposal, and legal hold automation rules.
- Access control models, encryption, and audit trails.
- Personal data protection and confidentiality controls.



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- Integration with email, ERP, CRM, and office applications.
- Migration planning from shared drives and legacy systems.
- Workshop: configuring a workflow with retention rules.

Day 5: Audit, Monitoring, and Continuous Improvement

- Conducting EDMS audits and compliance assessments.
- Log monitoring, alerts, and reporting dashboards.
- Handling e-discovery, legal holds, and information requests.
- Staff training and user adoption programmes.
- Measuring retrieval speed and records quality KPIs.
- Planning an EDMS and e-archiving improvement roadmap.
- Workshop: presenting an EDMS improvement plan.

Conclusion

By successfully completing the Professional Electronic Document Management Systems (EDMS), E-Archiving Training Course, participants will have acquired the knowledge to configure EDMS platforms, design metadata and indexing schemes, digitise records to quality standards, automate retention, and secure electronic archives with proper access controls. They will also gain the ability to audit the system and support legal and regulatory compliance. Furthermore, the course prepares teams to move from scattered filing to governed digital records management. Gentex Training Center delivers this programme with a strong emphasis on practical, workplace-ready implementation.





FAQs for the Professional Electronic Document Management Systems (EDMS), E-Archiving course

Q1 What is the "Professional Electronic Document Management Systems (EDMS), E-Archiving" course about?

It is a practical programme on implementing and operating electronic document management and digital archiving systems. It covers EDMS architecture, metadata and indexing design, digitisation, workflow automation, retention and security controls, integration with business applications, and compliance auditing.

Q2 What are the key benefits of the "Professional Electronic Document Management Systems (EDMS), E-Archiving" course?

Participants gain a controlled document environment that makes retrieval fast and predictable, which cuts the time staff waste searching for files. The course reduces paper and storage costs, strengthens compliance with retention requirements, improves security of confidential documents, and gives management clear audit trails and reporting.



Q3 What skills will I gain from the "Professional Electronic Document Management Systems (EDMS), E-Archiving" course?

EDMS configuration and administration; metadata, indexing and classification design; digitisation and electronic archiving workflows; and workflow automation, retention control, security and audit management.

Q4 What tools, methods, or standards are covered in the "Professional Electronic Document Management Systems (EDMS), E-Archiving" course?

The course covers EDMS, ECM and EDRMS platform categories, ISO 15489 records management, Dublin Core and ISAD(G) metadata standards, the OAIS reference model, optical character recognition (OCR) tools, checksum-based integrity verification, workflow and retention rule configuration, access control models, and document audit methodology.

Q5 How is the "Professional Electronic Document Management Systems (EDMS), E-Archiving" course applied in real-world practice?

Graduates apply it by configuring document types, metadata, and workflows in their organisation's EDMS, migrating files from shared drives into a governed repository, and digitising paper archives with quality checks. They also set retention and access rules, integrate the system with email and business applications, and report audit findings to management.