

WORKSHOP IN DOCUMENT MANAGEMENT AND FILING SYSTEMS



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TRAINING CENTER



Introduction

Effective document management is critical to organizational success. Without proper control, organizations can suffer from lost information, inefficiencies, and security risks. A robust document and filing system allows teams to access the right documents when needed, ensures compliance with regulations, and protects sensitive data. This workshop empowers participants to create and maintain professional document management frameworks that improve productivity, ensure proper recordkeeping, and enable seamless collaboration.

Participants will explore modern methods and technologies in document control, digital and manual filing systems, classification standards, retrieval systems, and archival procedures. With a balance of theory, discussion, and practical application, the course ensures a comprehensive understanding of both paper-based and electronic document environments.

Workshop in Document Management and Filing Systems Course Objectives

- Understand the key principles and importance of document management in business environments.
- Design and maintain efficient manual and electronic filing systems.
- Apply best practices for document classification, indexing, and retrieval.
- Implement systems that support legal compliance and audit requirements.
- Manage document lifecycle from creation to final disposal or archiving.
- Transition from paper-based to digital filing systems effectively.
- Improve internal communication through consistent documentation control.
- Ensure document security, confidentiality, and controlled access.
- Identify and eliminate inefficiencies in current filing practices.



Course Methodology

The course combines instructor-led presentations, interactive discussions, real-world examples, hands-on activities, and case studies to ensure practical understanding and engagement.

Who Should Take This Course

- Administrative professionals
- Records management officers
- Document controllers
- Office managers
- IT and archive support staff
- Anyone involved in documentation processes within an organization

Workshop in Document Management and Filing Systems Course Outlines

Day 1: Fundamentals of Document and Records Management

- Definition and scope of document management
- Difference between documents and records
- Legal and organizational importance
- Characteristics of effective document management
- Introduction to classification, indexing, and metadata



Day 2: Manual Filing Systems and Practices

- Types of filing systems (alphabetical, numerical, geographical, etc.)
- Planning and organizing physical files
- Filing equipment and storage solutions
- Access controls for paper files
- Document retrieval and tracking methods

Day 3: Digital Document Management Systems (DMS)

- Components and benefits of a DMS
- Key features: scanning, OCR, tagging, version control
- Selecting and implementing the right DMS
- Integration with business processes
- Backup, recovery, and disaster recovery planning

Day 4: Security, Compliance, and Retention

- Document security policies and access control
- Ensuring confidentiality and compliance with regulations
- Retention schedules and lifecycle policies
- Preparing for internal and external audits
- Case study: managing sensitive data

Day 5: Practical Implementation and Best Practices

- Evaluating current document management practices
- Mapping the document flow in an organization

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Info@gentextraining.com



- Setting up document control procedures
- Monitoring and continuous improvement
- Workshop: Develop a document management plan for your office

Conclusion

By successfully completing the Workshop in Document Management and Filing Systems with Gentex Training Center, participants will gain in-depth knowledge and practical skills to optimize and maintain both physical and electronic document management systems. This knowledge will help ensure smooth information flow, increased productivity, and enhanced organizational compliance.

