



Training Course On Advanced Document Management Systems And Technology (10 Days)

20 - 31 Oct 2025
San Diego





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Ref.: 36309_53648 **Date:** 20 - 31 Oct 2025 **Location:** San Diego **Fees:** 28000 **Euro**

Course Overview:

The course is designed to equip professionals with cutting-edge skills and knowledge in managing digital records, ensuring legal compliance, and enhancing information governance. Covering a broad spectrum from Electronic Records Management to Blockchain Technology and Recordkeeping, the course integrates the latest Information Governance Program strategies with hands-on training in Enterprise Content Management Systems, including SharePoint Records Management. Participants will explore Records Retention Strategies, delve into Privacy and Security in Information Management, and understand the critical role of Metadata Standards in today's digital age. By focusing on Disaster Preparedness and Business Continuity Planning, the course prepares organizations to safeguard their vital records against unforeseen events.

Target Audience:

- Records Managers
- Information Governance Officers
- Compliance Managers
- IT Professionals
- Legal Professionals
- Archivists and Librarians
- Data Privacy Officers
- Business Continuity Planners

Targeted Organizational Departments:

- Information Technology
- Legal and Compliance
- Records and Archives
- Human Resources
- Operations and Business Continuity

Targeted Industries:

- Healthcare
- Financial Services
- Government and Public Sector
- Technology and Software: Innovating in ECM systems and information governance.
- Manufacturing and Logistics

Course Offerings:

By the end of this course, participants will be able to:

- Understand the foundations of Document Management Technology.
- Implement advanced Electronic Records Management Techniques.
- Develop and manage Information Governance Programs.
- Design strategies for Records Retention and Disposal.
- Utilize Enterprise Content Management Systems effectively.
- Ensure Legal and Regulatory Compliance in records management.

Training Methodology:

The training employs a blend of interactive lectures, case studies, group work, and hands-on sessions. Interactive lectures will introduce core concepts, while case studies provide real-world applications. Group work fosters collaboration, and hands-on sessions with Document Management Systems, including SharePoint, offer practical experience.

Course Toolbox:

- Comprehensive Course Workbooks
- Access to Online Learning Platforms and EDRMS Training Modules
- Checklists and Templates for Records Management Program Implementation
- Legal Compliance and Best Practices Guides
- Case Studies on Blockchain Technology and Social Media Records Management

Course Agenda:

Day 1: Foundations of Document Management and Information Governance

- **Topic 1:** The Origins and Development of Records and Information Management
- **Topic 2:** Records and Record-keeping in Society
- **Topic 3:** Information Technology, Records, and the Information Age
- **Topic 4:** Web 2.0, Social Media, and Society
- **Topic 5:** Legal and Regulatory Frameworks
- **Topic 6:** Introduction to Information Governance Programs
- **Reflection & Review:** Reviewing the Evolution and Key Concepts in Document Management



Day 2: Building an Information Governance Program

- **Topic 1:** Records Management as a Professional Management Discipline
- **Topic 2:** Records and Information Management Lifecycle
- **Topic 3:** Developing Records Management Program Elements
- **Topic 4:** Functions and Activities in Information Governance
- **Topic 5:** Standards, Laws, Regulations, and the Legal Environment
- **Topic 6:** Policy Development and Implementation
- **Reflection & Review:** Insights into Establishing Information Governance

Day 3: Advanced Document Management Strategies

- **Topic 1:** Records and Information Creation and Capture
- **Topic 2:** Controlled Language and Records Classification
- **Topic 3:** Business Classification Schemes and Taxonomies
- **Topic 4:** Indexing, Content Analysis, and File Plan Development
- **Topic 5:** Records Management Metadata Standards
- **Topic 6:** Strategies for Document Retrieval and Access
- **Reflection & Review:** Effective Strategies for Advanced Document Management

Day 4: Technology Integration in Records Management

- **Topic 1:** Electronic Records and Electronic Records Management Systems ERMS
- **Topic 2:** Enterprise Information Systems EIS and Content Management Systems CMS
- **Topic 3:** Implementation of Enterprise Content Management Systems ECMS
- **Topic 4:** SharePoint and Its Role in Records Management
- **Topic 5:** Best Practices for ERMS Implementation
- **Topic 6:** Cloud-Based Solutions for Records Management
- **Reflection & Review:** Exploring Technological Advances in Records Management

Day 5: Risk Management, Security, and Compliance

- **Topic 1:** Identifying and Managing Vital Records
- **Topic 2:** Disaster Preparedness, Recovery, and Business Continuity Planning
- **Topic 3:** Monitoring, Auditing, and Compliance in Information Management
- **Topic 4:** Data Privacy and Security Standards
- **Topic 5:** Legal Compliance and Ethical Considerations in Records Management
- **Topic 6:** Developing a Culture of Compliance and Governance
- **Reflection & Review:** Strengthening Risk Management and Compliance Strategies



Day 6: Digital Preservation and Long-Term Record-keeping

- **Topic 1:** Digital Preservation Principles and Practices
- **Topic 2:** Trusted Digital Repositories and Digital Curation
- **Topic 3:** Long-Term Digital Preservation Strategies
- **Topic 4:** Managing Obsolescence and Data Migration
- **Topic 5:** Leveraging Blockchain Technology for Record Integrity
- **Topic 6:** Case Studies on Digital Preservation Challenges and Solutions
- **Reflection & Review:** Ensuring Longevity and Integrity in Digital Records

Day 7: Advanced Technologies and Innovation in Document Management

- **Topic 1:** Artificial Intelligence and Machine Learning in Records Management
- **Topic 2:** Automation and Robotics Process Automation RPA in Document Management
- **Topic 3:** Utilizing Big Data Analytics in Information Governance
- **Topic 4:** The Impact of Emerging Technologies on Records Management
- **Topic 5:** Mobile and Remote Access to Records
- **Topic 6:** Innovations in Metadata and Semantic Search
- **Reflection & Review:** Exploring the Frontier of Document Management Technologies

Day 8: Strategic Planning and Leadership in Information Management

- **Topic 1:** Strategic Planning for Records and Information Management
- **Topic 2:** Leadership Skills in Information Governance
- **Topic 3:** Change Management in Records Management Programs
- **Topic 4:** Stakeholder Engagement and Communication Strategies
- **Topic 5:** Future Trends in Information Governance and Records Management
- **Topic 6:** Building and Leading Effective Information Management Teams
- **Reflection & Review:** Strategic Approaches and Leadership in Information Management

Day 9: Specialized Areas in Records Management

- **Topic 1:** Managing Social Media Records and Electronic Communications
- **Topic 2:** Records Management in Healthcare and Compliance with HIPAA
- **Topic 3:** Financial Services and Regulatory Compliance
- **Topic 4:** Government Records Management and Transparency
- **Topic 5:** Managing Intellectual Property and Confidential Information
- **Topic 6:** International Records Management Standards and Practices
- **Reflection & Review:** Understanding Specialized Challenges and Solutions



Day 10: Capstone Project, and Professional Development

- **Topic 1:** Capstone Project: Applying Knowledge to Real-World Scenarios
- **Topic 2:** Final Assessment and Feedback
- **Topic 3:** Career Paths and Professional Development Opportunities
- **Topic 4:** Building a Personal Brand in Records and Information Management
- **Topic 5:** Networking and Continuing Education Resources
- **Reflection & Review:** Celebrating Achievements and Planning for Future Success

How This Course is Different from Other Document Management Technology Courses:

The course stands apart by offering a holistic and integrated approach to records and information management. Unlike other courses that may focus solely on technical aspects or theoretical knowledge, this program delves into practical, real-world applications of Document Management Technology, including the latest developments in blockchain and cloud-based systems. It emphasizes a complete understanding of legal and regulatory requirements, coupled with hands-on training in leading Enterprise Content Management Systems. The inclusion of Disaster Preparedness and Business Continuity Planning prepares organizations not just for today's challenges but for future uncertainties. This course is uniquely positioned to foster not only skill development but also strategic thinking, ensuring participants can lead Information Governance Programs effectively within their organizations.

Training Course Categories



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Management Training
Courses**



**Certified Courses By
International Bodies**



**Communication and
Public Relations
Training Courses**



**Data Analytics Training
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Courses**



**Environment &
Sustainability Training
Courses**



**Governance, Risk and
Compliance Training
Courses**



**Human Resources
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Development Courses**



**IT Security Training & IT
Training Courses**



**Leadership and
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**Legal Training,
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Training Course Categories



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WHO WE ARE

Agile Leaders is a renowned training center with a team of experienced experts in vocational training and development. With 20 years of industry experience, we are committed to helping executives and managers replace traditional practices with more effective and agile approaches.

OUR VISION

We aspire to be the top choice training provider for organizations seeking to embrace agile business practices. As we progress towards our vision, our focus becomes increasingly customer-centric and agile.

OUR MISSION

We are dedicated to developing value-adding, customer-centric agile training courses that deliver a clear return on investment. Guided by our core agile values, we ensure our training is actionable and impactful.

WHAT DO WE OFFER

At Agile Leaders, we offer agile, bite-sized training courses that provide a real-life return on investment. Our courses focus on enhancing knowledge, improving skills, and changing attitudes. We achieve this through engaging and interactive training techniques, including Q&As, live discussions, games, and puzzles.



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