

Training Course On Advanced Document Management Systems And Technology (2 Weeks)

15 – 26 March 2027
Barcelona

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Overview

Organizations face expanding volumes of unstructured data, heightened regulatory exposure, and the operational risks of unmanaged electronic files. This intensive programme equips professionals with practical architectures for deploying and supervising advanced document management systems across enterprise infrastructures. Participants examine electronic records lifecycle controls, information governance frameworks, metadata taxonomy design, and automated retention scheduling. Through applied scenarios involving cloud repositories, content management tools, and digital preservation workflows, learners build the capability to safeguard institutional knowledge and maintain compliance. This course is delivered by Agile Leaders Training Center.

Who Should Attend

- Records managers supervising electronic repository migration, retention policies, and disposal authorization.
- Information governance officers establishing metadata structures, document access tiers, and lifecycle controls.
- Compliance managers monitoring corporate records integrity, audit readiness, and statutory retention schedules.
- IT systems administrators configuring enterprise content management platforms and cloud storage permissions.
- Legal and archival officers responsible for digital preservation, litigation holds, and vital records protection.

Departments and Industries

This course serves records, compliance, and IT personnel across data-intensive sectors requiring defensible information governance.

- Information Technology and Records Management Departments in Banking and Financial Services
- Legal, Risk, and Compliance Divisions in Healthcare Networks and Clinical Research
- Archives and Corporate Governance Units in Public Sector Agencies and Municipalities
- Document Control and Engineering Administration in Energy, Manufacturing, and Logistics
- Data Governance and Operations Groups in Technology and Enterprise Software Firms

Learning Objectives

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

- Structure defensible information governance programs aligned with international standards.
- Configure advanced document management systems to automate document indexing, capture, and classification.
- Design enterprise taxonomies, file plans, and metadata standards to facilitate document retrieval.
- Implement records retention and disposal schedules that address statutory compliance and business requirements.
- Deploy digital preservation strategies and trusted digital repositories to manage technology obsolescence.
- Formulate disaster recovery and business continuity plans that safeguard vital organizational records.

Course Agenda

Day 1: Foundations of Document Management and Information Governance

- Origins and operational evolution of records and information management
- Information technology disruption and digital recordkeeping requirements
- Social media, collaborative platforms, and web document capture
- Legal frameworks, evidentiary value, and regulatory considerations
- Establishing formal information governance programs across enterprise functions
- Reviewing fundamental document lifecycle principles and core terminology

Day 2: Building an Information Governance Program

- Structuring records management as an executive operational discipline
- Analyzing the complete records and information lifecycle from creation to disposition
- Developing program components, operating charters, and steering committees
- Defining operational functions, custodian roles, and governance activities
- Evaluating international standards, statutory rules, and compliance obligations
- Drafting and enforcing enterprise-wide document policies and procedure guides

Day 3: Advanced Document Management Strategies

- Standardizing information capture workflows and multi-channel intake protocols
- Applying controlled vocabularies and document classification systems
- Constructing business classification schemes and corporate taxonomies
- File plan formulation, indexing rules, and content analysis practices
- Records management metadata standards and automated tagging configurations
- Search optimisation techniques and controlled retrieval permission models

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Day 4: Technology Integration in Records Management

- Architectures of electronic records management systems and central repositories
- Differentiating enterprise information systems, content platforms, and document vaults
- Implementation methodologies for enterprise content management systems
- SharePoint configuration models for document control and records retention
- Technical migration planning and system integration best practices
- Cloud-based records architecture, tenant security, and hybrid deployments

Day 5: Risk Management, Security, and Compliance

- Identification, cataloguing, and protection of critical vital records
- Disaster preparedness, response procedures, and business continuity planning
- Auditing information management systems and conducting compliance reviews
- Information security baselines, access control lists, and data privacy controls
- Defensible recordkeeping practices and corporate ethical obligations
- Embedding accountability and governance routines within organizational culture

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

- Digital preservation concepts, file format degradation, and fixity checks
- Architectural models for trusted digital repositories and curation pipelines
- Formulating multi-year digital preservation strategies and migration cycles
- Managing media obsolescence, hardware dependencies, and emulation tactics
- Evaluating blockchain technology for tamper-evident audit logging and verification
- Case analysis on digital repository failures and remediation strategies

Day 7: Advanced Technologies and Innovation in Document Management

- Artificial intelligence applications for automated document indexing and classification
- Robotic process automation in document validation and routing routines
- Big data analytics methods applied to information governance visibility
- Evaluating the governance impact of emerging digital workplace technologies
- Mobile document access, synchronization protocols, and endpoint device security
- Semantic search algorithms, natural language processing, and metadata enrichment

Day 8: Strategic Planning and Leadership in Information Management

- Developing multi-year strategic roadmaps for records and information assets
- Executive stakeholder engagement and business case justification for governance
- Change management techniques for enterprise system adoption and user adherence
- Cross-departmental communication strategies and policy roll-out initiatives
- Horizon scanning for emerging document management and governance trends
- Structuring, training, and directing multidisciplinary document management teams

Day 9: Specialized Areas in Records Management

- Governance protocols for electronic messaging, chat platforms, and social media
- Document management requirements within healthcare and clinical research
- Compliance tracking and recordkeeping controls for financial services
- Public sector records administration, archiving protocols, and open records mandates
- Securing intellectual property, proprietary files, and confidential records
- Harmonizing international records practices across multi-site operating entities

Day 10: Capstone Project and Professional Development

- Capstone project: Designing an enterprise document management deployment plan
- System evaluation presentations and peer-reviewed workflow assessments
- Professional competencies and career development pathways in records governance
- Building operational credibility and governance visibility within organizations
- Ongoing professional development resources and industry network engagement
- Course reflection, action planning, and roadmap finalization

Practical Exercises

Participants engage in practical application activities to translate governance theories into working workplace procedures.

- Suggested activity: Draft an enterprise file plan and business classification scheme for a corporate department.
- Suggested activity: Configure metadata tags and retention triggers for a sample document repository.
- Suggested activity: Conduct a vital records risk assessment and construct a response recovery checklist.
- Suggested activity: Develop an information governance change management plan for rolling out a new system.

FAQs

How does this course address system selection and platform configuration?

The curriculum provides technical evaluation frameworks for enterprise content platforms, detailing cloud storage choices, access management architectures, and platform-specific records setups.

What preservation methodologies are examined for electronic records?

Participants explore digital curation workflows, checksum validation, file format conversion, emulation strategies, and repository designs that safeguard digital assets against technological obsolescence.

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Which standards form the basis of the governance modules?

The syllabus references widely recognized international recordkeeping principles, including lifecycle models, trusted digital repository criteria, and standard metadata schema.

Conclusion

This 2-week programme provides the technical knowledge and operational discipline necessary to modernize organizational recordkeeping. By mastering document architectures, retention frameworks, and automated system administration, professionals return to their workplaces prepared to eliminate data sprawl, ensure defensible compliance, and lead enterprise information governance initiatives with lasting impact.