

EDMS Backup, Restoration, and Recovery Training Course

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Course Overview

EDMS backup, restoration, and recovery is a two-week advanced course for EDMS administrators, records managers, IT operations staff, information governance professionals, and continuity teams who leave with an EDMS Backup and Restoration Runbook. Participants design recovery objectives, backup architecture, replication, protected storage, integrity tests, restoration procedures, incident coordination, validation, and reconstitution through one continuing system case. The course connects document availability, evidence, access, and recovery decisions. EDMS backup and restoration are delivered by Agile Leaders Training Center.

Who Should Attend

- EDMS administration functions responsible for repositories, configurations, integrations, and system availability
- IT operations functions responsible for backup infrastructure, monitoring, restoration, and technical recovery
- Records management functions responsible for document integrity, retention, access, and evidence
- Information governance functions responsible for control requirements, accountability, and recovery assurance
- Security and incident functions responsible for containment, protected copies, and recovery coordination
- Continuity functions responsible for impact analysis, recovery objectives, exercises, and reconstitution

The course assumes participants already support an EDMS, records repository, backup service, or continuity process, and it leaves out introductory document classification and product-specific installation.

Departments and Industries

The course supports EDMS recovery across regulated, information-intensive, and operational environments.

- Information technology, cybersecurity, and infrastructure operations
- Records management, information governance, and internal control
- Banking, insurance, and professional services
- Healthcare, education, and public-service organizations
- Manufacturing, energy, and logistics operations
- Legal, engineering, and document-intensive project environments

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Learning Objectives

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

- Analyze EDMS dependencies, information criticality, and disruption impacts
- Build recovery time and recovery point objectives
- Evaluate backup, replication, storage, and protection architectures
- Use integrity, restoration, functionality, and evidence tests
- Prioritize incident recovery, access, communication, and reconstitution actions
- Build and exercise an EDMS Backup and Restoration Runbook

Course Agenda

Day 1: EDMS Recovery Context

- EDMS Service and Dependency Map
- Document Repository Component Inventory
- Information Criticality Classification Matrix
- Disruption Scenario and Impact Register
- Recovery Governance and Decision Rights Map

Day 2: Recovery Requirements and Objectives

- Business Impact Analysis Method
- Recovery Time Objective Worksheet
- Recovery Point Objective Worksheet
- Maximum Tolerable Disruption Assessment
- Recovery Priority and Dependency Sequence

Day 3: Backup Architecture and Coverage

- Full, Incremental, and Differential Backup Design
- EDMS Database and Content Store Coverage Map
- Configuration and Integration Backup Checklist
- Backup Schedule and Retention Matrix
- Backup Capacity and Growth Forecast

Day 4: Replication, Storage, and Protection

- Replication Topology and Consistency Model
- Offsite and Isolated Copy Architecture
- Backup Access Control and Privilege Matrix
- Encryption Key and Recovery Dependency Register
- Backup Immutability and Change Protection Controls

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Day 5: Monitoring and Integrity Assurance

- Backup Job Monitoring Dashboard
- Failure Alert and Escalation Workflow
- Media and Data Integrity Test Plan
- Backup Catalogue Reconciliation Method
- Recovery Evidence and Exception Log

Day 6: Restoration Procedure Engineering

- Restoration Request and Authorization Workflow
- Granular Document Restoration Procedure
- Repository and Database Restoration Sequence
- Metadata, Version, and Permission Recovery Checklist
- Restoration Rollback and Abort Criteria

Day 7: Incident Recovery Coordination

- Incident-to-Recovery Activation Matrix
- Recovery Team Roles and Contact Tree
- Containment and Clean-Restore Decision Method
- Recovery Communication and Status Template
- Third-Party Service Recovery Coordination Plan

Day 8: Validation and Reconstitution

- Recovered Data Validity Test Script
- EDMS Functionality Validation Checklist
- Access and Permission Verification Matrix
- Audit Trail and Transaction Reconciliation Method
- Reconstitution and Return-to-Service Criteria

Day 9: Runbook and Exercise Design

- NIST SP 800-34 Rev. 1 Contingency Planning Structure
- EDMS Backup and Restoration Runbook Template
- Tabletop Exercise Scenario Design
- Technical Restoration Test Plan
- Lessons-Learned and Corrective Action Register

Day 10: Recovery Simulation and Capstone

- Recovery Objective Prioritization Exercise
- Backup Failure Diagnosis Exercise
- Repository Restoration and Validation Exercise
- Incident Communication and Reconstitution Exercise
- Capstone EDMS Recovery Simulation

Practical Exercises

The course uses suggested activities that connect architecture, operations, governance, and recovery evidence.

- Suggested activity: map EDMS dependencies and set recovery objectives for banking and healthcare scenarios
- Suggested activity: evaluate backup coverage, protected storage, monitoring, and integrity evidence against defined requirements
- Suggested activity: execute a restoration sequence and validate documents, metadata, permissions, functionality, and audit records
- Suggested activity: run an EDMS recovery simulation and record corrective actions in the runbook

FAQs

Who is the EDMS Backup, Restoration, and Recovery Training Course suited to?

The course suits experienced professionals who already support document systems, backup operations, records controls, information governance, incidents, or continuity and need an advanced recovery engineering method.

How does EDMS backup and restoration differ from general document management training?

EDMS backup and restoration focuses on technical recoverability, protected copies, restoration sequences, validation, and reconstitution, while general document management training focuses on classification, workflows, retention, access, and everyday repository use.

How are recovery time and recovery point objectives used for an EDMS?

Recovery time and recovery point objectives define how quickly EDMS service must return and how much document change can be lost, guiding architecture, scheduling, replication, storage, priorities, and testing.

What should an EDMS restoration test validate?

An EDMS restoration test should validate document content, metadata, versions, permissions, search, integrations, audit trails, transactions, user functions, timing, evidence, and return-to-service decisions.

Why does EDMS recovery require reconstitution?

Reconstitution confirms that restored components operate together in a trusted state, temporary arrangements are removed, normal controls resume, users are informed, and unresolved issues enter corrective action.

Conclusion

Participants take back an EDMS Backup and Restoration Runbook containing objectives, architecture decisions, schedules, controls, monitoring, restoration procedures, validation scripts, communication routes, and exercise records. The runbook creates a shared recovery method across technical and governance teams. It helps organizations test recoverability, preserve document evidence, coordinate incidents, and return the EDMS to controlled service.

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