

EDMS Configuration and Control Techniques Training Course

AGILE LEADERS
Training Center

AGILE LEADERS
Training Center

EDMS Configuration and Control Techniques Training Course

Course Overview

EDMS Configuration and Control Techniques Training Course is a one-week course for document controllers, records staff, administrators, and information professionals who leave with an EDMS Control Configuration Pack. Participants configure capture rules, metadata, version control, permissions, approval workflows, retrieval, audit trails, and retention coordination. The course turns document-management requirements into testable settings and operating evidence. EDMS configuration and control techniques are taught by Agile Leaders Training Center.

Who Should Attend

- Document-control functions responsible for controlled files and revisions
- Records functions responsible for capture, metadata, retention, and disposition coordination
- System-administration functions responsible for libraries, permissions, and monitoring
- Quality functions responsible for approvals, traceability, and audit evidence
- Information-management functions responsible for classification, search, and retrieval

The course assumes participants work with electronic documents and leaves out software development, infrastructure recovery, and long-term archival preservation strategy.

Departments and Industries

The course supports EDMS control in regulated and document-intensive operations.

- Engineering, construction, and energy operations
- Healthcare and life-science services
- Finance and professional services
- Education and research organizations
- Corporate quality, information technology, and shared services

Learning Objectives

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

- Analyze EDMS requirements, roles, document types, and control risks
- Build capture, naming, classification, and metadata configurations
- Apply version, check-in, approval, and publication controls
- Use permission, search, retrieval, and audit-trail settings
- Evaluate workflow exceptions, retention triggers, and control evidence

- Build an EDMS Control Configuration Pack

Course Agenda

Day 1: EDMS Control Foundations

- EDMS Scope and Boundary Map
- Document Type and Content Inventory
- Control Requirement Traceability Matrix
- System Role and Responsibility Model
- ISO 15489-1:2016 Records Control Reference

Day 2: Capture and Metadata Configuration

- Document Capture Rule Set
- File Naming Convention Standard
- Classification Scheme Design
- Metadata Field Configuration Sheet
- Required Metadata Validation Checklist

Day 3: Versions and Workflow Controls

- Version Numbering and Status Model
- Check-In and Check-Out Control Rules
- Approval Workflow Configuration Diagram
- Publication Permission Decision Matrix
- Workflow Exception and Escalation Log

Day 4: Access, Retrieval, and Lifecycle Evidence

- Role-Based Access Configuration Matrix
- Search and Retrieval Test Script
- Audit Trail Event Register
- Retention Trigger Mapping Sheet
- Disposition Referral Evidence Checklist

Day 5: EDMS Configuration Practice

- Capture and Metadata Configuration Exercise
- Version and Approval Control Exercise
- Permission and Retrieval Test Simulation
- Audit Trail and Retention Evidence Exercise
- Capstone EDMS Control Configuration Pack

Practical Exercises

The course uses suggested activities based on document-control cases from engineering, healthcare, education, and professional services.

- Suggested activity: configure capture rules and metadata for a mixed document set
- Suggested activity: diagnose a version conflict and repair an approval route
- Suggested activity: test role-based access, search results, and retrieval evidence
- Suggested activity: trace an audit event to a retention and disposition referral

FAQs

Who does the EDMS Configuration and Control Techniques Training Course suit?

The course suits professionals who already handle electronic documents, metadata, permissions, workflows, or control evidence and need a structured configuration method.

How does EDMS configuration training differ from general records management training?

EDMS configuration training focuses on translating document-control requirements into system settings and tests, while general records management addresses broader governance and lifecycle principles.

What belongs in an EDMS metadata configuration?

An EDMS metadata configuration defines each field, purpose, format, allowed value, requirement status, source, ownership, validation rule, and search behavior.

How should EDMS version and approval controls work together?

Version and approval controls should distinguish drafts from approved issues, restrict publication authority, record decisions, preserve history, and prevent uncontrolled copies from appearing current.

What evidence shows EDMS controls are operating?

Operating evidence includes configuration records, permission assignments, workflow histories, version logs, retrieval tests, audit-trail events, exception records, and retention referrals.

Conclusion

Participants take back an EDMS Control Configuration Pack linking requirements, capture, metadata, versions, workflows, permissions, retrieval, audit trails, and retention evidence. The pack replaces informal settings with documented rules and tests. It helps document teams configure controls consistently, diagnose exceptions, and demonstrate how electronic documents are governed.

AGILE LEADERS
Training Center

Training Course Categories

- Agile PM and Project Management Training Courses
- Agribusiness & Food Security Training Courses
- Aviation Management and Operations Training Courses
- Certified Courses By International Bodies
- Communication and Public Relations Training Courses
- Crisis Management and Business Continuity Training Courses
- Data Analytics Training and Data Science Courses
- Digital Government & Public Service Training Courses
- Education and Learning Development Training Courses
- Environment & Sustainability Training Courses
- Facilities and Real Estate Training Courses
- Finance and Accounting Training Courses
- Governance, Risk and Compliance Training Courses
- Healthcare Management Training Courses
- Heritage Conservation and Museum Management Training Courses
- Hospitality and Tourism Training Courses
- Human Resources Training and Development Courses
- IT Security Training & IT Training Courses
- Leadership and Management Training Courses
- Legal Training, Procurement and Contracting Courses
- Maintenance Training and Engineering Training Courses
- Marketing, Customer Relations, and Sales Courses
- NGO, Humanitarian and Development Management Training Courses
- Occupational Health, Safety and Security Training Courses
- Oil & Gas Training and Other Technical Courses
- Personal & Self-Development Training Courses

AGILE LEADERS
Training Center

Training Course Categories

- Quality and Operations Management Training Courses
- Secretarial and Administration Training Courses
- Shipping, Maritime and Ports Training Courses

AGILE LEADERS
Training Center

Training Cities

Abu Dhabi UAE	**Accra** Ghana	**Addis Ababa** Ethiopia
Amman Jordan	**Amsterdam** Netherlands	**Athens** Greece
Baku Azerbaijan	**Bali** Indonesia	**Bangkok** Thailand
Barcelona Spain	**Berlin** Germany	**Cairo** Egypt
Cape town South Africa	**Casablanca** Morocco	**Chicago** USA
Doha Qatar	**Dubai** UAE	**Frankfurt** Germany
Geneva Switzerland	**Istanbul** Turkey	**Jakarta** Indonesia
Johannesburg South Africa	**Kuala Lumpur** Malaysia	**Kuwait** Kuwait
Lagos Nigeria	**Langkawi** Malaysia	**Lisbon** Portugal
London UK	**Madrid** Spain	**Manama** Bahrain
Marbella Spain	**Milan** Italy	**Montreux** Switzerland
Munich Germany	**Muscat** Oman	**Nairobi** Kenya

AGILE LEADERS
Training Center

Training Cities

New York USA	**Nice** France	**Paris** France
Phuket Thailand	**Port Louis** Mauritius	**Porto** Portugal
Prague Czech Republic	**Rome** Italy	**San Diego** USA
Seoul South Korea	**Sharm El-Sheikh** Egypt	**Singapore** Singapore
Tashkent Uzbekistan	**Tbilisi** Georgia	**Tokyo** Japan
Toronto Canada	**Trabzon** Turkey	**Vienna** Austria
Zanzibar Tanzania	**Zoom** Online Training	**Zurich** Switzerland