

Electronic Records Governance Assurance Training Course

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Course Overview

Electronic Records Governance Assurance Training Course is a one-week advanced course for records managers, information-governance specialists, document-control leads, and audit staff who leave with an Electronic Records Governance Assurance Plan. Participants connect ISO 15489 and ISO 30301 principles with metadata rules, retention and disposition authorization, hold conflicts, access reviews, migration reconciliation, control sampling, measures, and corrective action. The course tests governance evidence. Electronic records governance assurance is taught by Agile Leaders Training Center.

Who Should Attend

- Records governance functions responsible for policy, objectives, and lifecycle controls
- Information management functions responsible for metadata and retention requirements
- Document-control leadership responsible for access, holds, and disposition decisions
- Technology liaison functions responsible for electronic-record migration assurance
- Audit and compliance functions responsible for testing governance evidence

The course assumes participants manage electronic-record controls and leaves out introductory filing, basic EDMS use, and formal certification-auditor qualification.

Departments and Industries

The course supports electronic-records governance assurance across regulated and operational environments.

- Corporate information governance and records management
- Financial and professional services
- Healthcare and education administration
- Energy, utilities, and industrial operations
- Government and nonprofit archives

Learning Objectives

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

- Analyze electronic-record governance scope, requirements, roles, and risks
- Build metadata, retention, disposition, and hold-control tests
- Apply access review and defensible disposal evidence methods
- Use migration mapping, reconciliation, and validation controls
- Evaluate performance measures, findings, and corrective actions
- Build an Electronic Records Governance Assurance Plan

Course Agenda

Day 1: Governance Architecture

- ISO 15489 Records Principle Map
- ISO 30301 Management System Scope
- Records Requirement Traceability Matrix
- Governance Role and Authority Chart
- Electronic Records Risk Register

Day 2: Metadata and Lifecycle Rules

- Metadata Rule Test Catalogue
- Retention Schedule Control Review
- Disposition Authorization Matrix
- Legal Hold Conflict Decision Log
- Defensible Disposal Evidence Pack

Day 3: Access and Migration Assurance

- Electronic Record Access Review
- Source-to-Target Data Mapping
- Record and Metadata Reconciliation Sheet
- Migration Exception Register
- Post-Migration Validation Protocol

Day 4: Measurement and Audit Evidence

- Records Control Sampling Plan
- Governance Evidence Index
- Records Performance Measure Dictionary
- Management Review Evidence Pack
- Corrective Action Verification Log

Day 5: Governance Assurance Practice

- Requirement Traceability Exercise
- Retention and Hold Control Exercise
- Migration Reconciliation Simulation
- Finding and Corrective Action Review
- Capstone Electronic Records Governance Assurance Plan

Practical Exercises

The course uses suggested activities based on financial services, healthcare, government archives, and industrial operations.

- Suggested activity: trace business requirements to electronic-record controls and owners
- Suggested activity: test retention, disposition, and hold-conflict evidence
- Suggested activity: reconcile migrated records and metadata against source totals
- Suggested activity: classify a finding and verify a corrective action using retained evidence

FAQs

Who does the Electronic Records Governance Assurance Training Course suit?

The course suits experienced records and assurance professionals and assumes responsibility for policy, metadata, retention, access, migration, audit evidence, or corrective action.

How does electronic-records governance assurance differ from EDMS user training?

Electronic-records governance assurance tests management-system and lifecycle controls, while EDMS user training teaches routine document capture, retrieval, versioning, and workflow tasks.

How do ISO 15489 and ISO 30301 relate to electronic records?

ISO 15489 defines records-management concepts and principles, while ISO 30301 specifies management-system requirements for records policy, objectives, operation, performance evaluation, and improvement.

What makes electronic-record disposal defensible?

Defensible disposal uses approved retention rules, verified eligibility, hold checks, authorized decisions, controlled execution, exception handling, and retained evidence of what was disposed and why.

How is an electronic-record migration assured?

Migration assurance uses defined scope, source-to-target mapping, preserved metadata links, reconciled counts, exception records, usability and integrity checks, access validation, and approval evidence.

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Conclusion

Participants take back an Electronic Records Governance Assurance Plan linking requirements, roles, metadata, retention, disposition, holds, access, migration, evidence, measures, and corrective action. The plan replaces isolated checks with a structured assurance cycle. It helps records leaders demonstrate control design, identify governance gaps, and verify that corrective action addresses the supporting evidence.

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