

Electronic Records Lifecycle and Controls Training Course

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Course Overview

Electronic Records Lifecycle and Controls Training Course is a one-week course for records officers, document controllers, information governance staff, administrative professionals, compliance coordinators, and EDMS users who leave with an Electronic Records Lifecycle Control Toolkit. Participants design capture, classification, metadata, indexing, access, workflow, version, retention, disposition, audit, and quality controls through one continuing repository case. The course separates working documents from declared records and traces each control to its lifecycle purpose. Electronic records lifecycle and controls are taught by Agile Leaders Training Center.

Who Should Attend

- Records functions responsible for capture, classification, retention, disposition, and evidence
- Document control functions responsible for identifiers, versions, approvals, and distribution
- Information governance functions responsible for policies, ownership, access, and assurance
- Administrative functions responsible for electronic filing, retrieval, and workflow records
- Compliance support functions responsible for control evidence and audit readiness
- EDMS user functions responsible for consistent metadata, indexing, and record handling

The course assumes participants already handle electronic documents, records, or EDMS workflows, and it leaves out system programming and vendor-specific installation.

Departments and Industries

The course supports controlled electronic records across regulated, operational, and information-intensive environments.

- Records management, information governance, and administration
- Information technology, cybersecurity, and digital transformation
- Banking, insurance, and professional services
- Healthcare, education, and public-service organizations
- Engineering, construction, and project document control
- Energy, manufacturing, and logistics operations

Learning Objectives

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

- Analyze electronic document and record lifecycle requirements
- Build classification, metadata, naming, and indexing controls
- Apply capture, workflow, approval, and version rules
- Use role-based access and audit-trail evidence
- Build retention, review, disposition, and hold controls
- Evaluate retrieval, completeness, integrity, and record quality

Course Agenda

Day 1: Lifecycle and Record Requirements

- Document-to-Record Lifecycle Map
- ISO 15489-1:2016 Concepts and Principles
- Record Requirement and Responsibility Matrix
- Record Declaration and Capture Criteria
- Electronic Repository Scope Register

Day 2: Classification and Metadata

- Business Classification Scheme
- Electronic File Plan Structure
- Metadata Element Definition Sheet
- Naming Convention and Identifier Rules
- Indexing and Retrieval Test Script

Day 3: Workflow, Versions, and Access

- Document Review and Approval Workflow
- Version Status and Revision History Matrix
- Declared Record Lock and Change Control
- Role-Based Access Permission Matrix
- Activity Log and Audit Trail Review

Day 4: Retention, Disposition, and Quality

- Retention Schedule Mapping Method
- Review and Disposition Authorization Workflow
- Record Hold and Suspension Register
- Record Completeness and Integrity Checklist
- EDRM Quality Exception and Correction Log

Day 5: Records Control Practice and Capstone

- Classification and Metadata Design Exercise
- Workflow and Version Control Exercise
- Access and Audit Evidence Exercise
- Retention and Disposition Control Exercise
- Capstone Electronic Records Lifecycle Control Toolkit

Practical Exercises

The course uses suggested activities that connect record requirements, system controls, lifecycle decisions, and quality evidence.

- Suggested activity: classify and define metadata for project and administrative record sets
- Suggested activity: map approval, version, declaration, and access controls for a healthcare repository
- Suggested activity: apply retention and disposition decisions to a mixed electronic file plan
- Suggested activity: test retrieval, audit trails, completeness, and correction evidence in an EDMS case

FAQs

Who is the Electronic Records Lifecycle and Controls Training Course suited to?

The course suits intermediate records, document-control, governance, administration, compliance-support, and EDMS professionals who already handle electronic information and need consistent lifecycle controls.

How do electronic records lifecycle controls differ from general document management training?

Electronic records lifecycle controls focus on evidence, record declaration, metadata, access, audit trails, retention, disposition, and integrity, while general document management training may focus mainly on everyday filing, collaboration, and retrieval.

What is the difference between an electronic document and a record?

An electronic document can remain editable working information, while a record is captured and controlled as evidence of an activity, decision, obligation, or transaction.

Why are metadata and classification important for electronic records?

Metadata and classification connect records with business context, ownership, access, retention, retrieval, relationships, status, and disposition so they remain findable and interpretable over time.

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What should an electronic records quality review test?

An electronic records quality review should test required metadata, classification, identifiers, versions, permissions, audit history, retention mapping, retrieval, completeness, integrity, and authorized corrections.

Conclusion

Participants take back an Electronic Records Lifecycle Control Toolkit containing lifecycle maps, requirements, classification, file plans, metadata, naming, workflow, versions, access, audit, retention, disposition, and quality controls. The toolkit creates traceability from capture to final disposition. It helps organizations retrieve reliable records, enforce responsibilities, preserve evidence, and correct control exceptions.

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