



Document Digitization and Electronic File Management Training Course

9 – 13 May 2027
Toronto

Document Digitization and Electronic File Management Training Course

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Overview

Document Digitization and Electronic File Management Training Course is a one-week foundation-to-intermediate course for records, administration, document control, information management, operations, and digital transformation functions who leave with a Digitization Operations and File Control Pack. Participants plan a digitization project, prepare source files, manage scanning and OCR, build metadata and file naming controls, verify quality, govern access, and coordinate retention, migration, backup, audit trails, and handover. Agile Leaders Training Center develops document digitization and electronic file management capability.

Who Should Attend

- Records functions responsible for inventory, classification, retention, disposition, and evidence
- Administration functions responsible for files, correspondence, retrieval, and office information
- Document control functions responsible for naming, versions, access, distribution, and audit trails
- Information management functions responsible for metadata, repositories, permissions, and lifecycle controls
- Operations functions responsible for digitization workflows, quality checks, exceptions, and handover
- Transformation functions responsible for conversion projects, adoption, migration, and service continuity

The course assumes participants handle organizational files and routine office systems, and leaves out scanner repair, software development, forensic recovery, and jurisdiction-specific legal advice.

Departments and Industries

The course supports departments and industries that convert paper or legacy files while preserving retrieval, control, and operational continuity.

- Records, administration, document control, archives, information management, and shared services
- Healthcare, education, financial services, insurance, and professional services
- Manufacturing, construction, engineering, utilities, transport, and logistics
- Technology, telecommunications, retail, hospitality, and property management
- Public-service, nonprofit, cultural, and infrastructure organizations

Learning Objectives

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

- Build a digitization scope, inventory, priority model, and workflow
- Apply document preparation, scanning, OCR, and file-format controls
- Build metadata, file naming, classification, and indexing rules
- Evaluate image, text, metadata, and completeness quality
- Apply access, retention, disposition, migration, backup, and audit controls
- Build a Digitization Operations and File Control Pack

Course Agenda

Day 1: Scope Records and Plan Conversion

- Digitization Purpose and User Needs Canvas
- Records Inventory and Source Condition Register
- Selection, Priority, and Exclusion Matrix
- Volume, Capacity, and Risk Estimate
- Digitization Project Charter and Responsibility Map

Day 2: Prepare, Scan, and Capture Text

- Document Preparation and Chain-of-Custody Checklist
- Scanning Profile and File Format Specification
- Batch, Separator, and Sequence Control Sheet
- Optical Character Recognition Configuration Method
- Exception, Rescan, and Source Return Log

Day 3: Structure Metadata and Retrieval

- Administrative, Descriptive, and Technical Metadata Schema
- File Naming and Identifier Convention
- Folder, Classification, and Index Design
- Search, Retrieval, and Version Control Test
- Metadata Ownership and Change Control Matrix

Day 4: Assure Quality and Govern Files

- Image Quality and Legibility Inspection Checklist
- OCR Accuracy and Metadata Validation Sample
- Completeness, Reconciliation, and Corrective Action Log
- Access Permission and Segregation Matrix
- Retention, Disposition, Migration, Backup, and Audit Control Map



Day 5: Practice Digitization Operations

- Exercise: Triage a Mixed Records Inventory
- Exercise: Configure a Scanning and OCR Batch
- Exercise: Inspect Images, Text, and Metadata
- Exercise: Resolve Access, Retention, and Migration Cases
- Capstone: Digitization Operations and File Control Pack

Practical Exercises

The course uses suggested activities based on personnel files, service records, engineering drawings, invoices, correspondence, and case documentation.

- Suggested activity: inventory source files, assess condition and risk, set priorities, and assign responsibilities.
- Suggested activity: prepare a batch, specify scanning and OCR controls, and document exceptions and source return.
- Suggested activity: design metadata and naming rules, then test retrieval, versions, and permissions.
- Suggested activity: inspect a sample, reconcile completeness, record corrective actions, and prepare operational handover.

FAQs

Who suits document digitization and electronic file management training, and what does it assume?

Records, administration, document control, information management, operations, and transformation functions suit the training; it assumes routine responsibility for organizational files and office systems.

How does document digitization differ from general records management training?

Document digitization concentrates on converting source files into controlled, searchable digital objects and validating the result. General records management training addresses the broader lifecycle of records regardless of format.

What should a document digitization quality plan check?

A document digitization quality plan should check image legibility, orientation, cropping, sequence, OCR accuracy, metadata accuracy, file naming, expected counts, missing content, duplicate files, corrective action, and reinspection.



How should electronic file metadata and naming rules be designed?

Electronic file metadata and naming rules should support identity, context, ownership, dates, classification, retrieval, versions, access, retention, technical properties, and auditability without relying on unexplained personal abbreviations.

When can source files move to disposition after digitization?

Source files can move to disposition only after the organization validates completeness, quality, metadata, usability, required approvals, retention authority, holds, and the continuing need for the original medium.

Conclusion

Participants take back a Digitization Operations and File Control Pack containing inventories, priorities, workflow maps, capture specifications, metadata rules, quality checks, exception logs, permission matrices, lifecycle controls, and handover records. It changes digitization from isolated scanning into a controlled operating process. The pack supports reliable retrieval, accountability, continuity, and lifecycle decisions.