Advanced Electronic Document and Records Management Training Course

14 - 18 Dec 2026

Lisbon

4500 € (Per Person)

Ref: #DM5355_90825

Course Introduction / Overview:

In today's data-driven world, the ability to effectively manage electronic documents and records is no longer a competitive advantage but a fundamental necessity for organizational survival and success. This course provides a comprehensive A-to-Z guide to the principles, strategies, and technologies behind modern Electronic Document and Records Management Systems (EDRMS). Moving beyond basic software training, this program delves into the strategic implementation of information governance frameworks that ensure compliance, mitigate risk, and enhance operational efficiency. As highlighted by the renowned academic Patricia C. Franks in her seminal work, "Records and Information Management," a systematic approach is crucial for controlling the creation, maintenance, use, and disposition of records. This training, offered by BIG BEN Training Center, is designed to equip professionals with the skills to manage the entire records lifecycle, from digital capture and classification to long-term preservation and secure disposal. Participants will explore how to leverage EDRMS to streamline business processes, protect sensitive information, and meet stringent regulatory requirements in an increasingly complex digital landscape.

Target Audience / This training course is suitable for:

- Records Managers and Information Officers.
- IT Professionals and System Administrators.
- Compliance Officers and Risk Managers.
- Archivists and Librarians.
- Legal Professionals and Paralegals.
- Administrative and Executive Support Staff.
- Project Managers involved in digital transformation.
- Operations Managers and Department Heads.
- Quality Assurance Specialists.

Target Sectors and Industries:

- Government and Public Sector Agencies.
- Financial Services and Banking.
- Healthcare and Pharmaceutical Industries.
- Legal and Professional Services Firms.
- Energy, Oil, and Gas Sector.
- Engineering and Construction.
- Educational Institutions.
- Telecommunications and Technology.
- Non-Profit Organizations.

Target Organizations Departments:

- Information Technology (IT) Department.
- Legal and Compliance Departments.
- Administration and Operations.
- Human Resources (HR).
- Finance and Accounting.
- Archives and Records Management.
- Quality Assurance and Control.
- Procurement and Contracts Management.
- Research and Development (R&D).

Course Offerings:

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

- Develop a strategic framework for implementing an EDRMS.
- Master the principles of the electronic records lifecycle from creation to disposition.
- Design and apply effective classification schemes and metadata models.
- Establish robust information governance policies and procedures.
- Ensure compliance with legal, regulatory, and industry standards like ISO 15489.
- Implement security protocols and access controls to protect sensitive information.
- Manage digital preservation and long-term archiving strategies.
- Automate business processes and workflows using EDRMS capabilities.
- Conduct risk assessments and develop mitigation plans for electronic records.
- Evaluate and select appropriate EDRMS technologies for their organization's needs.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, engaging, and practical, ensuring that participants not only learn the theory but can also apply it directly to their professional roles. This course utilizes a blended learning approach that combines expert-led presentations with hands-on exercises and collaborative activities. We believe in learning by doing, so a significant portion of the course is dedicated to real-world case studies, allowing participants to analyze complex scenarios and develop effective solutions. Group discussions and brainstorming sessions encourage the sharing of diverse perspectives and experiences, fostering a rich, collaborative learning environment. Participants will work in teams on practical simulations, such as designing a file plan or a retention schedule, receiving constructive feedback from both the instructor and their peers. The program emphasizes a participant-centered approach, where active involvement is key to mastering the concepts of electronic document and records management. Our goal is to create an immersive and supportive atmosphere that builds both competence and confidence in managing critical organizational information assets.

Course Agenda (Course Units):

Unit One: Foundations of Electronic Records Management

- Introduction to Electronic Document and Records Management Systems (EDRMS).
- The distinction between document management and records management.
- Key concepts: authenticity, reliability, integrity, and usability of records.
- The complete electronic records lifecycle model.
- The legal and regulatory landscape for electronic records.
- Introduction to international standards, including ISO 15489.
- The business case for implementing an EDRMS.

Unit Two: Planning and Implementing an EDRMS

- Conducting a needs analysis and records inventory.
- Developing business requirements and functional specifications.
- Evaluating and selecting EDRMS software and vendors.
- Project management for EDRMS implementation.
- Change management strategies for user adoption.
- Developing a comprehensive training program for staff.
- Data migration strategies from legacy systems.

Unit Three: Core EDRMS Functions and Operations

- Principles of document capture and digital imaging.
- Developing business classification schemes and file plans.
- The critical role of metadata in search and retrieval.
- Implementing version control and document history.
- Automating business processes with workflows.
- Advanced search and retrieval techniques.
- Integration of EDRMS with other business systems.

Unit Four: Information Governance, Risk, and Compliance

- Developing a corporate information governance framework.
- Creating and implementing records retention and disposition schedules.
- Managing information security and access control policies.
- Conducting risk assessments for electronic records.
- Understanding audit trails and system monitoring.
- E-discovery, legal holds, and litigation readiness.
- Ensuring data privacy and protection within the EDRMS.

Unit Five: Advanced Topics and Future Trends in EDRMS

- Strategies for long-term digital preservation and archiving.
- Managing records in the cloud and hybrid environments.
- The impact of Artificial Intelligence (AI) and Machine Learning on records management.
- Leveraging analytics for insights from managed content.
- The role of blockchain for ensuring record integrity and authenticity.
- Managing records from emerging technologies (social media, IoT).
- Preparing for the future of information management.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

As AI becomes more integrated into records management, how might the traditional roles of records managers and archivists evolve to focus more on strategic information governance rather than manual classification and retrieval?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by moving beyond a purely technical or software-focused approach to EDRMS. Instead, it embeds the principles of electronic records management within a broader strategic framework of information governance, risk, and compliance. While other courses may focus on the features of a specific platform, our curriculum emphasizes the development of a vendor-neutral, best-practice methodology that participants can apply to any system or organizational context. We focus on the "why" behind the "how," ensuring that professionals understand the legal, ethical, and business drivers for effective records management. The program is uniquely structured to address both current challenges and future trends, equipping participants with the foresight to manage emerging technologies like AI and blockchain in an information context. Through a rich blend of case studies drawn from diverse industries and interactive workshops, this course provides a holistic and practical learning experience. It is designed not just to train users, but to cultivate strategic thinkers who can lead digital transformation initiatives and build resilient, compliant, and efficient information ecosystems within their organizations.