CONCEPT

Electronic Document Management and Digital Archiving: EDRMS, Digitisation and Preservation

15 – 19 February 2027
London - Central London four-star



Electronic Document Management and Digital Archiving: EDRMS, Digitisation and Preservation

Ref: 1232_7182 **Date:** 15 – 19 February 2027 **Location:** London - Central London four-star **Fees:** 23000 SAR

Technical depth: Practitioner · **Practical mode:** Lab

Introduction

Many organisations have bought document management systems and scanned years of paper, yet staff still save files to personal drives, versions multiply and scanned images cannot be searched or relied on as evidence. Digital records also decay silently when formats age and systems are replaced. This Core Concept course equips document and archive practitioners to configure an electronic document and records management system, run reliable digitisation and preserve digital records to international standards. Participants work hands-on in lab exercises and leave with an EDRMS Configuration and Digital Preservation Plan.

Course Objectives

- Distinguish document and records management functions and evaluate systems against ISO 16175-1 requirements
- Design metadata schemas, content types and file formats that keep digital records usable and trustworthy
- Configure document libraries, retention labels, versioning and approval workflows in an EDRMS
- Plan and quality-control digitisation projects that produce reliable digital copies of paper records
- Apply OAIS packaging, fixity checks and PDF/A formats to preserve digital records over time
- Produce an EDRMS Configuration and Digital Preservation Plan for one's own department

Target Audience

- Records and document control officers who capture, classify and retrieve documents daily
- EDRMS and SharePoint administrators configuring libraries, metadata and retention
- Archive and digitisation staff running scanning and conversion projects
- Information management officers supporting migration from shared drives to managed systems
- Administrative coordinators responsible for departmental filing and approvals

Course Outline

Day 1: Electronic Document Management Foundations

- Document Management versus Records Management: EDMS and EDRMS Functions
- Content Inventory of Shared Drives, Email and Paper Holdings
- ISO 16175-1:2020 Functional Requirements for Records Software
- Digital Preservation Maturity Baseline Using the DPC Rapid Assessment Model
- Business Case Elements: Retrieval Time, Storage Cost and Compliance Exposure

Day 2: Architecture, Metadata and Preservation Standards

- ISO 14721:2025 OAIS Reference Model: SIP, AIP and DIP Packages
- Metadata Schema Design with Dublin Core ISO 15836-1:2017
- PREMIS Preservation Metadata and Checksum Fixity
- ISO 19005 PDF/A Conformance Levels and File Format Selection
- ISO/TR 15801:2017 Trustworthiness of Electronically Stored Information

Day 3: Configuring and Operating the EDRMS

- SharePoint Document Library Configuration: Content Types, Metadata Columns and Versioning
- Microsoft Purview Retention Labels, File Plan and Record Declaration
- Check-In, Check-Out and Approval Workflow Set-Up
- Enterprise Search Configuration and Saved Query Design
- Capture Rules for Email and Scanned Inbound Documents

Day 4: Digitisation, Migration and Problem Cases

- Digitisation Project Workflow Based on ISO/TR 13028:2010
- Scanning Quality Control: Resolution, OCR Accuracy and Image Validation
- Electronic Signatures and PAdES Long-Term Validation Profiles
- System Migration Plan: Metadata Mapping, Integrity Checks and Chain of Custody
- Disposition Review Workflow and Deletion Audit Trail

Day 5: Lab Builds and the Digital Preservation Plan

- Lab Build: Configuring a Departmental Records Library End to End
- Lab Build: Packaging and Validating a Digital Archive Transfer
- ISO 16363:2025 Trustworthy Repository Self-Audit Checklist
- EDRMS Configuration and Digital Preservation Plan Drafting
- Plan Presentation and Peer Review

Skills You Will Gain

- EDRMS Configuration
- Metadata Schema Design
- Retention Label Management
- Document Workflow Set-Up
- Digitisation Quality Control
- Digital Preservation Packaging
- File Format Validation
- Content Migration

Why Attend This Course

- Return to work with an EDRMS Configuration and Digital Preservation Plan that can be implemented in one department
- Gain hands-on practice configuring a records library rather than only hearing about one
- Avoid the digitisation and migration mistakes that leave scanned or moved records unusable as evidence
- Exchange approaches with document and archive practitioners from other sectors and countries

Conclusion

A document management system delivers value only when it is configured around the records it holds and the evidence they must provide years later. The course moves from inventorying content and assessing preservation maturity, through the OAIS model and metadata and format standards, to hands-on configuration of libraries, retention labels and workflows, and then to digitisation, signature and migration risks. The final day's lab builds turn this into an EDRMS Configuration and Digital Preservation Plan for each participant's department.