



*Training Course:
Electronic Document Management System
(EDMS)*

*9 - 13 November 2026
Madrid (Spain)*

Training Course: Electronic Document Management System (EDMS)

Training Course code: SC235506 From: 9 - 13 November 2026 Venue: Madrid (Spain) - Training Course Fees: 6300 € Euro

Introduction:

This program aims to provide participants with a comprehensive understanding of Electronic Document Management Systems (EDMS) and their role in enhancing the efficiency, security, and accessibility of documents within an organization. Participants will learn about the lifecycle of documents from creation to disposal, including best practices for implementation, compliance, and workflow automation. By the end of the program, participants will be equipped with the skills needed to manage electronic documents effectively and ensure that organizational records are safe and well-organized.

Objectives:

- Understand the concepts and benefits of an EDMS.
- Learn how to implement and configure an EDMS in a corporate environment.
- Explore document lifecycle management, including storage, retrieval, security, and compliance.
- Analyze the automation of workflows through an EDMS.
- Develop strategies for transitioning from paper-based systems to electronic formats.
- Master best practices for maintaining legal and regulatory compliance.

Target Audience:

- Document and Records Managers
- IT Managers and Administrators
- Project Managers
- Compliance Officers
- Legal and Administrative Professionals
- Anyone involved in document handling and archiving

Outline:

Day 1: Introduction to EDMS and Its Importance

- Introduction to Document Management Concepts
 - Defining Document Management
 - Traditional vs. Electronic Document Management
 - Key Features and Capabilities of an EDMS
- Importance of EDMS in Modern Organizations
 - Enhancing Document Accessibility and Security

- The Role of EDMS in Compliance and Governance
- Advantages of Moving from Paper to Digital
- Overview of Popular EDMS Tools
 - Introduction to Common EDMS Solutions
 - Key Differences and Features of Various EDMS Software

Day 2: Document Lifecycle Management and Compliance

- Document Creation and Capture
 - Digitizing Physical Documents
 - Creating Native Digital Documents
 - Tools for Document Capture and Import
- Document Storage and Retrieval
 - Best Practices for Secure Storage and Categorization
 - Efficient Document Retrieval and Search Mechanisms
 - Role-Based Access Control RBAC
- Regulatory and Legal Compliance
 - Understanding Compliance Requirements for Document Management
 - Managing Legal Holds, Audits, and Document Retention Policies
 - Industry Standards and Regulatory Frameworks e.g., GDPR, HIPAA

Day 3: Implementing and Configuring an EDMS

- Planning and Requirements Gathering
 - Defining Organizational Needs for EDMS
 - Key Considerations for Selection and Deployment
- System Configuration and Customization
 - Configuring EDMS for Different Business Units
 - Integrating EDMS with Existing IT Infrastructure

- Data Migration and System Integration
 - Migrating Documents from Legacy Systems
 - Best Practices for Seamless Integration with Other Applications e.g., CRM, ERP

Day 4: Workflow Automation and Document Security

- Workflow Automation
 - Automating Business Processes with EDMS
 - Designing Workflows for Document Approval, Revision, and Collaboration
- Document Security and Privacy
 - Implementing Security Features in EDMS
 - Encryption, Data Loss Prevention, and Access Controls
- Disaster Recovery and Backup Strategies
 - Ensuring Data Protection and Recovery in Case of System Failures
 - Backup Strategies and Policies for EDMS

Day 5: Best Practices and Future Trends

- Best Practices for Document Management
 - Establishing and Maintaining Document Policies and Standards
 - Continuous Improvement in Document Management Processes
- Future of Document Management
 - Cloud-based EDMS Solutions and Their Advantages
 - Trends in AI and Machine Learning for Document Management
- Case Studies and Real-World Applications
 - Case Studies from Different Industries
 - Group Discussion and Lessons Learned

Registration form on the Training Course: Electronic Document Management System (EDMS)

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