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COURSE BROCHURE

# Advanced EDRM Platform Implementation and Legacy Migration Course

**jupiterprime.uk**

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

# Advanced EDRM Platform Implementation and Legacy Migration Course

EDRM Platform Implementation and Legacy Migration is a 2-week advanced training course for EDRM system owners, records managers and IT information architects, in which each participant drafts an EDRM Implementation Roadmap with requirements and a migration plan. Organisations retiring shared drives and paper stores need a platform that captures, protects and disposes of digital records automatically, not another unmanaged repository. Jupiter Prime Training delivers this course for experienced information and technology leads.

## Why EDRM Platform Implementation and Legacy Migration Matters Now

Three trends push EDRM up the investment agenda. Cloud collaboration suites have multiplied unmanaged copies, making it hard to prove which file is authoritative. Ageing network drives and legacy archives carry security and storage costs that finance and security teams want reduced. Procurement of records software is increasingly judged on evidence that it can enforce retention and disposal without manual effort. Initiatives that specify requirements, metadata and migration carefully deliver a trusted repository users adopt; those that skip this groundwork buy software that becomes an expensive file share. The course rests on ISO 16175 for functional requirements of records software and ISO 15489-1 for records principles.

## Who Gains Most from EDRM Platform Implementation and Legacy Migration

- Owners accountable for the business case, budget and benefits of an EDRM platform
- Records specialists who translate retention and classification rules into system configuration
- Architects who design integration, metadata schemas and security models
- Analysts who gather user requirements and write test scripts for records functions
- Leads who plan data migration from shared drives, email stores and legacy systems

An implementation group gains most when its records lead, solution architect and business owner attend together and leave sharing one requirements catalogue and one migration sequence.

## EDRM Platform Implementation and Legacy Migration Capabilities

The capabilities follow an EDRM platform from business case through configuration to migration and adoption.

- Specify functional and non-functional EDRM requirements against ISO 16175 — the steering board and procurement panel
- Design a metadata schema and classification model that the system can enforce — records owners and solution architects
- Build workflows for records declaration, review and automated disposal — business process owners
- Assess migration sources and calculate effort, risk and sequencing — the executive sponsor
- Test configured retention, security and audit functions before go-live — information security and internal audit
- Communicate adoption plans and user roles to drive consistent capture — department heads and end users

## Key EDRM Platform Implementation and Legacy Migration Terms

- EDRM — software that manages documents and electronic records together, enforcing capture, classification, access, retention and disposal.
- Records declaration — the act of fixing a document as a record so its content and metadata can no longer be altered.
- Metadata schema — the defined set of fields, formats and rules describing every record in the system.
- Disposal schedule automation — system rules that trigger review or destruction when a record's retention period ends.
- Data migration — moving documents and metadata from legacy stores into the new platform with integrity preserved.
- Proof of concept — a limited trial that tests whether a candidate EDRM product meets key requirements.

## EDRM Platform Implementation and Legacy Migration Day by Day

## Day 1: The EDRM Landscape and Business Case

- Shared Drive Sprawl and Duplicate Copies — Cost and Risk of Doing Nothing
- EDRM Versus Collaboration Suites and Content Platforms — Where Each Fits
- Records Principles From ISO 15489-1 — What the System Must Protect
- Business Case Components — Benefits, Costs and Payback Logic
- Stakeholder Mapping for an EDRM Initiative — Sponsors, Owners and Users

## Day 2: Requirements Specification

- ISO 16175 Functional Requirements — Capture, Control, Retention and Disposal
- Non-Functional Requirements — Performance, Availability and Scalability
- Requirements Catalogue Structure — Priorities, Acceptance Criteria and Traceability
- User Story Sessions With Departments — Capturing Real Tasks
- Market Scan and Request for Proposal — Shortlisting Products

## Day 3: Metadata Models and Classification in the System

- Metadata Schema Design — Mandatory, Inherited and Automatic Fields
- Business Classification Mapped to System Containers — Inheriting Rules
- Controlled Lists and Taxonomies — Consistent Values Across Departments
- Auto-Classification and Content Analytics — Accuracy and Oversight
- Security and Access Models — Groups, Caveats and Inheritance

## Day 4: Workflows and Records Declaration

- Process Mapping for Approval Workflows — Contracts, Policies and Correspondence
- Declaration Triggers — Manual, Event-Based and Automatic Capture
- Email Capture Strategies — Rules, Plug-Ins and Mailbox Policies
- Electronic Signatures and Approvals — Evidential Value in Records
- Version Control and Locking — Protecting Declared Content

## Day 5: Retention, Disposal and Preservation in the Platform

- Retention Rules Configuration — Triggers, Periods and Events
- Disposal Review Workflows — Approvers and Evidence Capture
- Holds in the System — Suspending Automated Destruction
- Digital Preservation Formats — Long-Term Readability of Files
- Audit Trail Configuration — Events Logged and Report Formats

## Day 6: Integration and Architecture

- Integration With Line-of-Business Systems — Finance, HR and Case Management
- Application Programming Interfaces and Connectors — Capture From Other Platforms
- Cloud, On-Premises and Hybrid Hosting — Security and Sovereignty Trade-Offs
- Identity and Access Integration — Single Sign-On and Role Provisioning
- Backup and Recovery Design — Protecting the Repository

## Day 7: Planning the Migration

- Source Inventory — Shared Drives, Mailboxes and Legacy Archives
- Redundant, Obsolete and Trivial Content Clean-Up — Reducing Volume Before Moving
- Metadata Mapping and Enrichment — Filling Gaps During Transfer
- Migration Waves and Cut-Over Planning — Sequencing by Department
- Integrity Checks — Counts, Checksums and Sample Verification

## Day 8: Testing, Proof of Concept and Go-Live

- Proof of Concept Scenarios — Testing Critical Requirements Early
- User Acceptance Test Scripts — Records Functions End to End
- Performance and Security Testing — Load, Penetration and Permissions
- Go-Live Readiness Criteria — Data, Users and Support
- Hypercare and Issue Triage — Stabilising the First Weeks

## Day 9: Adoption, Training and Benefits Tracking

- User Role Design — Contributors, Records Officers and Administrators
- Change Champions Network — Peer Support in Departments
- Role-Based Training Paths — Short, Task-Focused Modules
- Adoption Metrics — Capture Rates and Shared Drive Decline
- Benefits Realisation Reviews — Comparing Outcomes With the Business Case

## Day 10: Practising the EDRM Implementation Roadmap

- Requirements Drill — Applying Day Two Catalogue to a Public Administration Case
- Metadata and Workflow Design Exercise — Applying Day Three and Day Four Methods to a Pharmaceutical Firm
- Migration Wave Plan — Applying Day Seven Sequencing to a Bank's Shared Drives
- Steering Board Presentation Rehearsal — Defending Scope, Risks and Costs
- EDRM Implementation Roadmap — Requirements, Architecture, Migration and Adoption Phases

## Applying EDRM Platform Implementation and Legacy Migration After the Course

- Build a requirements catalogue for the organisation's EDRM using ISO 16175 categories and agree priorities with records, IT and business owners.
- Inventory one department's shared drive, estimate redundant content and draft a metadata mapping for its first migration wave.

## EDRM Platform Implementation and Legacy Migration Questions FAQ

### What is EDRM platform implementation and legacy migration and why does it matter now?

EDRM platform implementation and legacy migration is the work of selecting, configuring and moving content into an electronic document and records management platform that captures, classifies, retains and disposes of records. It matters now because cloud collaboration and ageing shared drives have created unmanaged copies that raise cost and risk.

### Which roles gain most from EDRM platform implementation and legacy migration training?

EDRM system owners, records managers and IT information architects gain most. Owners shape the business case, records managers configure rules, and architects design metadata, integration and migration.

### How does an EDRM platform implementation and legacy migration course differ from a document control course?

An EDRM platform implementation and legacy migration course focuses on selecting, configuring and migrating to a records platform. A document control course concentrates on numbering, revision and distribution of documents on projects, whatever system is used.

## What do you bring back from EDRM platform implementation and legacy migration training?

You bring back a roadmap with prioritised requirements, a metadata model, an integration view and a migration plan. You also return with test scripts and adoption measures for go-live.

## EDRM Platform Implementation and Legacy Migration: The Way Forward

The EDRM Implementation Roadmap sequences requirements, architecture, migration waves and adoption activities for the platform. Its first use is the steering board decision on scope and product shortlist, taken with the system owner and IT architect. Revisit its migration and adoption sections after the first wave goes live, when real capture rates show where users need support.