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COURSE BROCHURE

Advanced Enterprise Content Management Training Course

30 August – 10 September 2027
Geneva

Advanced Enterprise Content Management Training Course

Ref: 210_6414 **Date:** 30 August – 10 September 2027 **Location:** Geneva **Fees:** 12500 GBP

Advanced Enterprise Content Management is a 2-week training course for records managers, information managers and document control leads who produce an enterprise content management roadmap with a classification scheme, metadata model and retention rules for one managed repository. Shared drives, email and collaboration sites now hold most institutional knowledge, yet little of it can be found, trusted or disposed of on time. The course is delivered by Jupiter Prime Training.

Why Enterprise Content Management Matters Now

Three forces shape the discipline today. Collaboration platforms multiply versions of contracts, drawings and policies faster than any folder structure can absorb; legal, audit and freedom-of-information requests demand that the authoritative copy be produced quickly; and storage, search and AI assistants perform poorly on unclassified, duplicated files. An organisation that controls its content lifecycle answers requests with confidence and retires obsolete material safely, while one that does not carries hidden discovery cost and reputational exposure. The course rests on ISO 15489 for records principles and ISO 16175 for records functionality in software.

Who Gains Most from Enterprise Content Management

- Specialists accountable for retention schedules, disposal authorities and legal holds
- Information architects who design file plans, taxonomies and metadata models
- Document control leads who manage revisions, transmittals and approval workflows
- Repository owners who configure libraries, permissions and content types
- Migration leads who move legacy shares and archives into managed platforms

An information governance office or a project controls function gains most when several members attend together and agree one classification scheme across departments.

Enterprise Content Management Capabilities

Participants move from tidying folders to engineering a content lifecycle in which every item carries its context, owner and disposal trigger.

- Design a functional classification scheme and file plan — department heads agreeing where content belongs
- Specify a metadata model with controlled vocabularies and auto-tagging rules — search and AI assistant owners
- Build retention schedules linked to business events and legal holds — legal and audit reviewers
- Apply workflow automation to review, approval and declaration of records — process owners reducing manual handling
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Weigh migration options for legacy shares, archives and email — sponsors approving scope and sequence
- Communicate a phased roadmap with adoption measures — executives funding the repository

Key Enterprise Content Management Terms

- File plan — the structured map of record categories, usually by business function, that determines where content is classified and how it is retained.
- Metadata schema — the defined set of descriptive, structural and administrative attributes, with allowed values, captured for each content item.
- Retention schedule — the authorised list of record classes stating how long each is kept, from which trigger, and what happens at the end.
- Disposition — the final action on content at the end of retention, such as destruction, transfer to an archive or extended review.
- Content type — a repository template defining the metadata, workflow and retention behaviour shared by one kind of document.
- Legal hold — an instruction that suspends disposal of specified content because it may be needed for litigation, audit or investigation.

Enterprise Content Management Day by Day

Day 1: Content Landscape and Information Risk

- Content Inventory and Heat Map — Locating Shares, Mailboxes and Collaboration Sites
- Redundant, Obsolete and Trivial Assessment — Sizing Clean-Up Before Migration
- Information Asset Register — Assigning Owners to High-Value Content Sets
- Discovery and Request Scenarios — Testing How Fast Authoritative Copies Are Found
- Maturity Assessment Model — Setting a Baseline for the Roadmap

Day 2: Records Principles and International Standards

- ISO 15489 Concepts — Authenticity, Reliability, Integrity and Usability of Records
- ISO 16175 Functional Requirements — Evaluating Repository Capabilities
- Record Declaration Rules — Deciding When a Document Becomes a Record
- Policy and Responsibility Matrix — Clarifying Duties of Creators and Custodians
- Vital Records Identification — Protecting Content Needed for Continuity

Day 3: Content Lifecycle Design

- Lifecycle Stage Model — Capture, Use, Review, Retention and Disposition
- Version and Revision Control — Separating Drafts From Approved Issues
- Capture Channels for Email, Scans and Forms — Routing Content Into Context
- Digitisation Standards for Paper Files — Balancing Image Quality and Cost
- Long-Term Preservation Formats — Keeping Content Readable Over Decades

Day 4: Classification Schemes and Taxonomy

- Business Classification Scheme by Function — Avoiding Department-Based Silos
- Faceted Taxonomy Design — Combining Subject, Project and Document Type
- Controlled Vocabulary and Thesaurus Building — Reducing Ambiguous Terms
- Card Sorting and Tree Testing — Validating Navigation With Real Users
- Taxonomy Change Control — Approving New Terms Without Fragmentation

Day 5: Metadata Models and Auto-Classification

- Core Metadata Set Definition — Choosing Mandatory and Optional Attributes
- Content Types and Inheritance — Applying Defaults by Library and Folder
- Machine-Assisted Tagging and Entity Extraction — Classifying at Scale
- Metadata Quality Rules — Measuring Completeness and Consistency
- Enterprise Search Tuning — Using Metadata to Rank and Filter Results

Day 6: Retention Schedules and Disposition

- Event-Based and Time-Based Triggers — Starting the Retention Clock Correctly
- Retention Class Consolidation — Simplifying Hundreds of Rules Into Big Buckets
- Legal Hold Process — Suspending Disposal for Litigation and Audit
- Disposition Review Workflow — Recording Approvals Before Destruction
- Certificates of Destruction and Audit Trails — Evidencing Defensible Disposal

Day 7: Workflow Automation and Document Control

- Process Mapping With BPMN Notation — Designing Review and Approval Routes
- Transmittal and Submittal Workflows — Controlling Engineering Document Exchange
- Electronic Signature and Approval Evidence — Proving Who Authorised Each Issue
- Low-Code Automation Rules — Triggering Declaration and Notifications
- Workflow Performance Indicators — Tracking Cycle Time and Bottlenecks

Day 8: Repository Architecture and Access

- Repository Platform Selection Criteria — Comparing Suites Against Requirements
- Site and Library Information Architecture — Structuring Hubs and Workspaces
- Permission Models and Sensitivity Labels — Balancing Sharing With Confidentiality
- Integration With Line-of-Business Systems — Linking ERP, CRM and Content
- Archive Tiering and Storage Policy — Moving Inactive Content to Lower-Cost Tiers

Day 9: Migration of Unstructured Content

- Migration Strategy Options — Lift and Shift Versus Clean and Classify
- Source-to-Target Mapping — Translating Folders Into Metadata and Content Types
- Migration Tooling and Test Batches — Validating Fidelity of Files and Properties
- Chain-of-Custody Controls — Preserving Evidential Value During Transfer
- Change and Adoption Plan — Retiring Legacy Shares Without Disruption

Day 10: Practising the Enterprise Content Management Roadmap

- Engineering Firm Case — Applying Document Control Workflows to Project Records
- Healthcare Provider Case — Applying Retention Triggers to Patient Administration Content
- Classification Scheme Review — Applying Faceted Taxonomy to a Pilot Department
- Sponsor Challenge Panel — Defending Phasing, Costs and Adoption Measures
- Enterprise Content Management Roadmap — Completing Scheme, Metadata and Retention Rules

Applying Enterprise Content Management After the Course

- Run a redundant, obsolete and trivial assessment on one shared drive and present a clean-up and migration proposal to its owner.
- Draft a functional file plan and retention class mapping for one department and test it through a card-sorting session.

Enterprise Content Management Questions FAQ

What is advanced enterprise content management, and why does it matter now?

It is the discipline of capturing, classifying, retaining and disposing of an organisation's documents and records through one controlled lifecycle. It matters now because collaboration platforms and AI search expose poorly classified content, while legal and audit requests demand fast access to authoritative copies.

Which roles gain most from enterprise content management training?

Records managers, information managers and document control leads gain most. You benefit if you are responsible for file plans, retention schedules, repository design or migrations in sectors such as engineering, healthcare, energy or public services.

How does an enterprise content management course differ from a document control course?

It works across the whole organisation rather than one project or discipline. A document control course concentrates on revisions and transmittals, while this subject also covers classification schemes, metadata, retention, repository architecture and migration of legacy content.

What do you bring back from enterprise content management training?

You bring back a phased plan that combines a classification scheme, metadata model and retention rules for one repository, with migration and adoption steps your colleagues can follow.

Enterprise Content Management: The Way Forward

The enterprise content management roadmap first informs which department or content set moves into the managed repository and in what order. Records leads, repository owners and legal reviewers use it to agree classification, metadata and disposal rules before migration starts. After the first wave, revisit the retention classes and auto-tagging rules, because real usage reveals where users still bypass the scheme.