JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Electronic Document Management System Techniques Training Course

8 – 12 March 2027
New York

Electronic Document Management System Techniques Training Course

Ref: 249_7873 **Date:** 8 – 12 March 2027 **Location:** New York **Fees:** 7900 GBP

Electronic Document Management System Techniques is a 1-week training course for document controllers, administrators and everyday EDMS users, in which each participant writes an EDMS User Procedure their colleagues can follow step by step. Organisations invest in electronic document platforms, yet poor metadata, parallel copies and misused check-out locks quickly undermine trust in them. Jupiter Prime Training delivers this course for practitioners who work in an EDMS every day.

Why Electronic Document Management System Techniques Matter Now

Two forces push day-to-day EDMS skills up the agenda. Teams in engineering, healthcare and public administration now share files across sites and contractors, so a single wrong upload or overwritten version spreads quickly. Managers also want to retire email attachments, which works only when staff trust search and workflows. Offices where users tag, version and route documents consistently find files in seconds and pass audits; those where habits vary rebuild the same documents and lose approvals. The course draws on ISO 16175, which sets out functional requirements for records software, to explain why each system control exists.

Who Gains Most from Electronic Document Management System Techniques

- Practitioners who register, upload and tag documents daily
- Administrators who set up folders, permissions and user groups
- Reviewers who comment on and approve documents through workflows
- Coordinators who search for, retrieve and distribute current versions
- Supervisors who check that colleagues follow agreed system habits

A department moving away from shared drives gains most when several of its regular EDMS users attend together and return applying one tagging habit and one check-in routine.

Electronic Document Management System Techniques Capabilities

Each capability targets a moment where a careless click confuses a colleague.

- Apply metadata entry rules so documents are findable by any colleague — the document control lead
- Use check-in, check-out and version controls without creating parallel copies — authors and reviewers
- Build saved searches and filters for frequent retrieval tasks — managers needing quick answers
- Route documents through review and approval workflows with clear comments — approving engineers and managers
- Specify folder permissions and sharing settings that protect sensitive files — the system administrator

- Communicate system steps to colleagues through a written user procedure — new joiners and contractors

Key Electronic Document Management System Techniques Terms

- Metadata — descriptive fields such as title, number, author and status that let a system find and sort documents.
- Check-out — locking a document for editing so others cannot change it at the same time.
- Major and minor version — numbering that separates approved releases from intermediate working drafts.
- Workflow — a configured route that sends a document to named people for review or approval in order.
- Access control list — the record of which users or groups may view, edit or delete an item.
- Audit trail — the system log showing who opened, changed, approved or moved a document and when.

Electronic Document Management System Techniques Day by Day

Day 1: Navigating the EDMS and Its Logic

- System Architecture for Users — Libraries, Folders, Containers and Views
- Document Lifecycle in the EDMS — Draft, Review, Approved and Superseded
- Functional Requirements From ISO 16175 — Why Controls Exist
- User Roles and Profiles — What Each Role Can See and Do
- Common User Errors — Duplicates, Wrong Folders and Lost Locks

Day 2: Capturing and Describing Documents

- Upload Methods — Drag and Drop, Bulk Import and Email Capture
- Mandatory and Optional Metadata Fields — Completing Profiles Correctly
- Naming and Numbering Inside the System — Avoiding Conflicts
- Scanned Paper Capture — Resolution, Text Recognition and Indexing
- Metadata Quality Checks — Spotting Missing or Inconsistent Entries

Day 3: Versions, Locks and Collaboration

- Check-In and Check-Out Routines — Preventing Overwrites
- Major and Minor Versioning — Drafts Versus Approved Releases
- Co-Authoring Versus Exclusive Editing — Choosing the Right Mode
- Restoring Earlier Versions — Recovering From Mistakes
- Linking Related Documents — Attachments, References and Renditions

Day 4: Search, Workflows and Permissions

- Basic and Advanced Search — Keywords, Filters and Metadata Queries
- Saved Searches and Alerts — Following Documents of Interest
- Review and Approval Workflows — Comments, Delegation and Deadlines
- Permission Settings — Groups, Inheritance and Exceptions
- External Sharing Controls — Links, Expiry and Watermarks

Day 5: Practising the EDMS User Procedure

- Capture and Tagging Drill — Applying Day Two Rules to a Hospital Department
- Versioning Exercise — Applying Day Three Routines to an Engineering Drawing Set
- Workflow and Search Scenario — Applying Day Four Settings to a Ministry Approval
- Audit Trail Review — Testing Who Did What on a Sample File
- EDMS User Procedure — Capture, Versioning, Search, Workflow and Access Steps

Applying Electronic Document Management System Techniques After the Course

- Clean up one active EDMS folder by completing missing metadata, removing duplicates and confirming the correct latest version of each document.
- Run a short session for colleagues on check-in, versioning and saved searches using the written user procedure, and collect their questions.

Electronic Document Management System Techniques Questions FAQ

What are electronic document management system techniques and why do they matter now?

Electronic document management system techniques are the daily user skills of capturing, tagging, versioning, finding and routing documents in an EDMS. They matter now because teams share files across sites and contractors, and inconsistent habits quickly erode trust in the system.

Which roles gain most from electronic document management system techniques training?

Document controllers, administrators and regular EDMS users gain most. Reviewers and supervisors also benefit because they rely on workflows, search and audit trails to approve and check work.

How does an electronic document management system techniques course differ from an EDMS implementation course?

An electronic document management system techniques course builds hands-on user skills in an existing system. An implementation course deals with requirements, product selection, configuration and migration for a new platform.

What do you bring back from electronic document management system techniques training?

You bring back a written user procedure covering capture, metadata, versioning, search, workflows and permissions, ready to share with your team and new joiners.

Electronic Document Management System Techniques: The Way Forward

The EDMS User Procedure turns system features into the steps a team follows every day for capture, versioning, search, workflow and access. Its first use is onboarding the next new joiner or contractor, led by the document controller. Revisit it after the first internal check of folders, when real errors show which steps need clearer wording.