
Digital Document Management Training

Course: Workflow, Access Rights and Records Control

31 May – 4 June 2027
Barcelona





Digital Document Management Training Course: Workflow, Access Rights and Records Control

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Programme Summary

Digital document management is the subject of this one-week training course for heads of administration, records, corporate services and digital transformation, ending in a document control framework for one business unit. Documents pass through drafting, approval, storage and disposal under many hands, yet ownership, access and retention are often left to the software default. The programme links classification, workflow, access rights and retention to the records each decision creates, applying every tool to a unit of the participant's own. Mars Training Centre UK delivers this programme on digital document management to mixed-organisation cohorts.

The Business Case

A document system holds the evidence on which contracts, audits and decisions rest, so weak control shows up as lost versions, delayed approvals and records kept far longer or shorter than needed. Where a system is judged only by whether files can be found, leaders miss gaps in ownership, permissions and disposal. Leaders who govern metadata, workflow and retention together can choose and audit a platform with evidence rather than supplier claims.

- Approval Cycle Time: Falls as workflow routes, deadlines and escalation rules are designed around real approvals.
- Information Exposure: Falls as access rights follow roles and are reviewed on a set cycle.
- Storage and Retrieval Effort: Improves as classification and retention rules remove duplicate and expired content.

Principles and Evidence Base

- ISO 15489: The international standard for records management concepts and principles frames the capture and classification work in Sessions 1 and 2.
- ISO 16175: The principles and functional requirements for records in electronic office environments structure the requirements checklist in Session 4.
- ISO 30301: The management system standard for records guides the roles, policy and audit design in Session 5.
- Information lifecycle thinking: Tracing a document from creation to disposal guides the retention work in Session 3.



Intended Participants

- Heads of administration who own document processes across several departments.
- Records and archive leaders who set classification and retention rules.
- Corporate services managers who sponsor platform selection or replacement.
- Digital transformation leads who plan migration from shared drives and paper.
- Internal audit and compliance leads who test document and records controls.

Typical functions include corporate services, government administration, banking, healthcare and engineering and construction.

Learning Outcomes

1. Participants will be able to construct a classification scheme and metadata set for a business unit.
2. Participants will be able to design approval workflows with owners, deadlines and escalation.
3. Participants will be able to evaluate access rights against roles and information sensitivity.
4. Participants will be able to justify retention periods and disposal rules for each record class.
5. Participants will be able to assess a platform against a functional requirements checklist.
6. Participants will be able to prioritise migration and audit actions in a document control plan.

Programme Structure

Day 1: Digital Document Management and the Records Lifecycle

What does a governed document system need to capture and prove?

- Document and Record Distinction Table
- Lifecycle Map from Creation to Disposal
- Current State Inventory of Repositories
- Ownership and Responsibility Matrix
- Business Risk Register for Documents

Day 2: Classification, Metadata and Version Control

How are documents named, described and versioned so that they can be trusted?

- Business Classification Scheme
- Metadata Profile by Record Class
- Naming Convention Standard
- Version and Revision Rules
- Duplicate and Orphan Content Review



Day 3: Workflow Design and Retention Control

How do approvals, holds and disposal run without relying on individuals?

- Approval Workflow Diagram
- Escalation and Deadline Rules
- Retention and Disposal Schedule
- Legal Hold Procedure
- Workflow Exception Log

Day 4: Access Rights, Security and Platform Requirements

Who may see, change and share each class of record, and what must the platform do?

- Role-Based Access Matrix
- Sensitivity Marking Guide
- Audit Trail Review Sheet
- Backup and Restoration Requirements List
- Functional Requirements Checklist

Day 5: Applying the Tools to One Business Unit

Do the classification, workflow, access and retention tools hold together for one unit?

- Applying the Session 2 Business Classification Scheme
- Testing the Session 3 Approval Workflow Diagram
- Checking the Session 4 Role-Based Access Matrix
- Sequencing Migration and Clean-Up Steps
- Completing the Document Control Framework

Methodology

The programme uses a structured exercise method built on anonymised folder structures, approval logs, access lists and retention schedules from administrative, engineering and financial settings. Participants work in peer groups on a shared business unit, test each other's rules against realistic requests and receive written facilitator feedback on each exercise set.

- Suggested activity: Classifying a mixed folder of contracts, correspondence and drafts into record classes.
- Suggested activity: Redrawing a stalled approval route with owners and escalation points.
- Suggested activity: Reviewing an access list to find permissions that no longer match roles.



Capstone Output

Each participant completes a document control framework for one business unit. It holds a classification scheme, a metadata profile, an approval workflow, a role-based access matrix, a retention schedule and a ranked migration plan. The framework is used at work to brief sponsors, write platform requirements and support internal audit of document controls.

Frequently Asked Questions

Is digital document management suitable for leaders who are not records specialists?

Yes. Digital document management assumes experience of running administrative or corporate processes and builds classification, workflow and retention reasoning step by step.

Which standards does digital document management rest on?

Digital document management rests on ISO 15489 for records principles, ISO 16175 for electronic requirements and ISO 30301 for the records management system.

How is the framework from digital document management used at work?

You use the document control framework to brief sponsors, write platform requirements, plan migration and support internal audit of document controls.

How does digital document management differ from general information technology administration?

Digital document management centres on records, approvals, access and retention for business content, while general information technology administration centres on infrastructure, devices and support.