

Enterprise EDMS & Microsoft 365 Document Management Training Program

Hours: 40

Course Overview

This program is designed to provide participants with a practical and strategic understanding of Enterprise Document Management Systems (EDMS) using the Microsoft 365 ecosystem.

Target Audience

- Document Controllers
- Project Coordinators
- IT Administrators
- Digital Transformation Teams
- Operations & Compliance Teams
- SharePoint Administrators
- Records Management Professionals
- Business Process Owners
- Department Heads managing enterprise documents
- Users involved in EDMS implementation or migration projects

Pre-Requisites

- Basic understanding of business documents and workflows
 - Familiarity with Microsoft Office applications
 - Basic computer and internet usage knowledge
 - Prior exposure to Microsoft 365 is beneficial but not mandatory
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Day 1: Introduction to EDMS & Microsoft 365 Environment

Module 1: Digital Transformation & EDMS Fundamentals

- What is Digital Transformation?
- Evolution from physical to digital documentation

- Role of EDMS in modern organizations
- Benefits of Document Management Systems
- Challenges in traditional document handling
- Real-life business examples and case studies
- Introduction to enterprise content lifecycle

Module 2: Introduction to Microsoft 365 for Document Management

- Overview of Microsoft 365 ecosystem
- Understanding collaboration-driven document management
- Introduction to:
 - Microsoft SharePoint
 - Microsoft OneDrive
 - Microsoft Teams
 - Power Automate
 - Power Apps
- How Microsoft 365 tools work together
- Understanding centralized vs decentralized document storage

Module 3: Gartner-Based EDMS Capabilities & Industry Standards

- Understanding Gartner EDMS capability framework
- Mandatory EDMS capabilities
- Common EDMS capabilities
- Emerging trends and modern EDMS features
- Intelligent document management concepts
- Governance, compliance, and retention overview
- Mapping Microsoft 365 capabilities with Gartner features

Lab Activities

- Login to Microsoft 365
- Upload documents to OneDrive
- Create folder structures
- Share files with permissions
- Explore SharePoint document libraries
- Identify EDMS capability areas within Microsoft 365

Day 2: Document Storage, Organization & Collaboration

Module 4: Document Storage & Structuring

- Folder hierarchy planning
- Department-wise and project-wise structures
- Naming conventions and standards
- Version control concepts
- Metadata basics (tags, categories, classifications)
- Document indexing approaches
- Avoiding duplicate document repositories

Module 5: SharePoint for Enterprise Document Management

- Creating SharePoint sites
- Site architecture basics
- Document libraries and lists
- Version history and recovery
- Check-in/check-out functionality
- Permissions and access control
- Retention and document lifecycle concepts

Module 6: Collaboration Using Microsoft Teams

- File sharing in Teams channels
- Co-authoring documents
- Conversations and threaded discussions
- Managing approvals and reviews
- Integrating Teams with SharePoint
- Best practices for collaborative environments

Module 7: OneDrive, Sync & Mobility

- Personal storage vs enterprise storage
- OneDrive synchronization
- Offline access and synchronization management
- Mobile accessibility
- Managing shared files securely

Lab Activities

- Create SharePoint sites and document libraries
 - Upload and manage document versions
 - Configure permissions and access controls
 - Collaborate on files through Teams
 - Sync SharePoint and OneDrive with local systems
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Day 3: Change Management & User Adoption

Module 8: Change Management Fundamentals

- What is Change Management?
- Organizational resistance to change
- User behaviour and adoption challenges
- Communication and awareness strategies
- Building digital adoption culture

Module 9: User Adoption Strategies for EDMS

- Training users effectively
- Creating SOPs and user guides
- User onboarding strategies
- Monitoring adoption and usage metrics
- Managing departmental transitions

Module 10: Governance & Compliance in EDMS

- Document governance basics
- Data ownership and accountability
- Access governance principles
- Retention policies and compliance basics
- Audit trails and tracking

Module 11: Microsoft 365 Adoption Best Practices

- Proper usage of Teams, OneDrive, and SharePoint
- File sharing standards
- Governance for collaboration platforms
- Avoiding uncontrolled document sprawl
- Security awareness and compliance practices

Lab Activities

- Create a simple SOP document
- Simulate document approval workflows
- Configure role-based access
- Create governance checklist templates
- Design departmental adoption plans

Day 4: EDMS Technologies, Implementation & Business Use Cases

Module 12: EDMS Implementation Methodology

- Steps to implement an EDMS
- Assessing business requirements
- Gap analysis techniques
- Migration planning basics
- Common implementation challenges
- Risk identification and mitigation

Module 13: Cloud vs On-Premise EDMS Environments

- Understanding cloud-based EDMS
- Understanding on-premise EDMS
- Hybrid deployment models
- Advantages and limitations of each approach
- Infrastructure considerations
- Security and compliance considerations
- Cost and scalability comparison

Module 14: Other EDMS Technologies Beyond Microsoft 365

- Overview of alternative EDMS platforms
- Comparing Microsoft 365 with enterprise EDMS tools
- Introduction to:
 - OpenText
 - Documentum
 - Laserfiche
 - M-Files
 - Alfresco
 - Box
 - Dropbox Business
- Selecting the right EDMS solution
- Mapping Gartner capabilities to EDMS technologies

Module 15: Business Use Cases & Industry Applications

- EDMS for corporate offices
- EDMS for construction projects
- EDMS for healthcare environments
- EDMS for engineering documentation
- Vendor and contract document management
- Project document lifecycle management

Lab Activities

- Create department-wise document structures
 - Simulate project document workflows
 - Compare cloud vs on-premise scenarios
 - Evaluate sample EDMS capability matrices
 - Create implementation planning checklist
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Day 5: Automation, Governance & Final Project

Module 16: Power Automate for EDMS

- Introduction to workflow automation
- Automating document approvals
- Notifications and reminders
- Workflow examples using Power Automate
- Basic integration concepts

Module 17: Power Apps for EDMS Solutions

- Introduction to Power Apps
- Creating simple document request forms
- Connecting Power Apps with SharePoint
- Basic low-code application concepts

Module 18: Data Security, Governance & Best Practices

- Data security fundamentals
- Access control policies
- Backup and recovery basics
- File naming standards
- Managing duplicate files
- Governance best practices
- Do's and Don'ts in enterprise EDMS

Module 19: EDMS Evaluation & Solution Design

- Evaluating organizational requirements
- Selecting suitable EDMS architecture
- Defining governance models
- Designing scalable document management frameworks
- Building roadmap for enterprise implementation

Module 20: Final Project & Practical Assessment

- Build a complete mini EDMS environment using:
 - SharePoint
 - Teams
 - OneDrive
 - Power Automate
- Implement permissions and governance
- Configure collaborative workflows
- Present document lifecycle flow

Final Lab Activities

- Upload and classify documents
- Configure permissions and access roles
- Create approval workflow
- Build collaboration channels in Teams
- Demonstrate document lifecycle process
- Present final EDMS solution design