Introduction

A Document Management System (DMS) is a computerized solution designed to track and store electronic documents. It simplifies managing versions created or modified by different users while overlapping with broader systems such as content management systems (CMS) and enterprise content management (ECM).

This **Advanced EDMS Electronic Document Management Systems Course** builds on fundamental concepts of EDMS, extending into digital asset management, document imaging, workflows, and records management. The training focuses on managing documents electronically to reduce reliance on hard copies, saving space, time, and operational costs.

Targeted Groups

This course is tailored for professionals in roles such as:

- Compliance Officers/Managers
- Information Security Managers
- Records Managers
- Information Managers
- Operations Managers
- Knowledge Managers
- Administrators
- Librarians and Secretaries

Course Objectives

By the end of this course, participants will:

1. Master the management and control of documents, folders, and forms while reducing distribution costs.
2. Utilize scanning, OCR, and indexing to archive paper documents.
3. Automate office functions, including workflows and electronic mail.
4. Address ISO 9000 and regulatory requirements effectively.
5. Understand the technologies underpinning EDMS.
6. Gain practical hands-on experience with EDMS products.
7. Evaluate emerging standards in document management.

Targeted Competencies

Participants will enhance their proficiency in:

- Document Control
- Optical Character Recognition (OCR)

- Data Management and Control
- Data Security

What is Advanced EDMS?

An **Advanced Electronic Document Management System (EDMS)** is a sophisticated approach to managing an organization’s information assets. This training provides a comprehensive understanding of EDMS functionalities, enabling participants to leverage the system’s advantages to streamline workflows, improve compliance, and optimize document handling processes.

Course Content

Unit 1: Introduction to Advanced EDMS

- Definition and benefits of EDMS
- Addressing paper floods and achieving the paperless office
- Document capture, scanning, and OCR techniques
- Image processing, indexing, archiving, and retrieval
- Practical demonstrations: Word processors, spreadsheets, and forms

Unit 2: EDMS Document Control

- Managing document revisions, versions, and histories
- Implementing audit trails and generating reports
- Forms Management: Creating, filling, and saving forms/data
- Document Distribution: Workflow management techniques
- Tracking and closure processes

Unit 3: Advanced EDMS Distribution and Workflow Management

- Advanced applications for document distribution
- Electronic mail integration: Concepts and demonstrations
- Document browsing techniques
    - Navigation strategies
    - Independent viewers for applications
    - Annotation tools: Sticky notes, redlining, and comments
- ISO 9000 and regulatory compliance
- System architectures: LANs, WANs, and client-server models

Unit 4: Technology Options for EDMS

- Encryption and data security
- Authoring and card/folio-based systems
- Comparison: Off-the-shelf vs. custom systems
- Implementing and managing EDMS
- Best practices for system updates and management
- Exploring future trends: Multimedia documents and documents on demand

Unit 5: Creating Backups and Restoring Data

- Top EDMS software solutions overview
- Best practices for document management based on ISO standards
- Document creation templates and multiple security levels
- Case study: TREENO Advanced Security and Audit
- Process context diagrams, flow diagrams, and RACI matrices

Conclusion

Upon completing this course, participants will earn an **EDMS Certificate**, validating their expertise in advanced document management systems. This specialized training equips professionals to optimize document processes, improve operational efficiency, and meet regulatory compliance requirements.

By mastering advanced EDMS functionalities, participants will become valuable contributors to their organizations, fostering streamlined workflows and robust document control mechanisms.