## Introduction

The oil and gas industry demands robust and efficient communication systems due to its highly dispersed workforce and diverse geographical operations. Seamless collaboration between contractors, suppliers, and stakeholders is vital, which can be significantly enhanced by implementing an **Electronic Document Management System (EDMS)**.

An EDMS provides a centralized platform for managing essential records such as contracts, procedures, compliance reports, and policy documents. This centralized approach ensures easy access, frequent updates, and efficient dissemination of critical information. By streamlining document workflows, EDMS facilitates improved collaboration, regulatory compliance, and adherence to industry standards.

This course is tailored to equip professional document controllers in the petroleum sector with the skills and knowledge necessary to manage oil and gas records proficiently.

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## Targeted Groups

This course is designed for:

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

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## Course Objectives

Upon completing this course, participants will be able to:

1. Manage and control documents, folders, and forms while reducing distribution costs and paper dependency.
2. Implement scanning, OCR, indexing, and archiving for paper documents.
3. Automate office workflows and integrate electronic mail systems.
4. Meet ISO 9000 standards and other regulatory requirements.
5. Understand and leverage the technologies encompassed in EDMS.
6. Gain practical experience with select EDMS products.
7. Evaluate emerging EDMS standards and trends.

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## Targeted Competencies

By the end of this training, participants will have developed expertise in:

- Document control
- OCR (Optical Character Recognition)
- Data management
- Data control
- Data security

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## Course Content

**Unit 1: Introduction to EDMS in the Petroleum Industry**

- **Understanding EDMS:** Benefits and essence of electronic document management systems.
- **Transition to Paperless Operations:** Addressing the inundation of paperwork.
- **Document Capture:** Scanning, OCR, and image processing techniques.
- **Indexing and Archiving:** Practical demonstrations on retrieval processes.
- **Document Management Fundamentals:** Organizing and maintaining digital records.

**Unit 2: Document Control in Petroleum Industry EDMS**

- Managing revisions, versions, and document histories.
- Importance of audit trails and reports in oil and gas projects.
- Creating, filling, and preserving data forms.
- Workflow management through document distribution and tracking.
- Best practices for ensuring document closure and compliance with industry requirements.

**Unit 3: Workflow Management and Distribution in the Petroleum Industry**

- Applications of workflow management in document creation and distribution.
- Tracking and closure methods in workflows.
- Leveraging electronic mail for document distribution.
- Navigating and annotating documents to meet ISO 9000 requirements.
- Understanding system architectures (LANs, WANs, and Client-Server Models) for EDMS in the petroleum sector.

**Unit 4: Technology and Implementation Options for EDMS**

- Encryption techniques for document protection.
- Overview of authoring systems and card/folio-based systems.
- Implementation strategies for EDMS in the oil and gas sector.
- Comparing off-the-shelf vs. custom EDMS solutions.
- Understanding management flows, role responsibilities, and process diagrams.
- Evaluating process measurements with KPIs and the RACI Matrix.

**Unit 5: Data Security in EDMS**

- Creating backups and restoration methods for critical data.
- Exploring top document management software for the oil and gas industry.
- Aligning document protocols with ISO standards.
- Addressing security through multi-level protection, illustrated with case studies like TREENO Advanced Security and Audit.

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## Conclusion

The electronic document management system (EDMS) diploma course is designed to transform the way records are managed in the petroleum industry. By aligning document management with international standards and leveraging the latest technologies, participants will be equipped to streamline workflows, enhance collaboration, and maintain regulatory compliance.

With practical training, hands-on demonstrations, and insights into emerging trends, this course ensures participants are ready to implement and manage advanced EDMS solutions that drive efficiency and innovation in the oil and gas sector.