Introduction

In today’s rapidly evolving digital landscape, information has become a critical asset for organizations. Effectively managing this information, particularly through electronic systems, is essential for improving efficiency, ensuring compliance, and reducing costs. The **Electronic Document Management Systems (EDMS) Course** addresses the complexities of archiving information across its entire lifecycle—from creation to disposal—using digital tools.

This course is designed to equip professionals with the skills to transition from paper-based to electronic document management. Participants will learn how to manage information securely and efficiently, leverage EDMS capabilities, and align these practices with organizational objectives for optimal performance.

Understanding an Electronic Document Management System (EDMS)

An **Electronic Document Management System (EDMS)** is a software solution that facilitates the creation, capture, indexing, storage, retrieval, and disposal of an organization’s records and information assets. By implementing EDMS, organizations can benefit from:

- **Enhanced Security**: Protect sensitive information with robust access controls.
- **Improved Accessibility**: Ensure quick and easy retrieval of records.
- **Regulatory Compliance**: Align with standards such as ISO 15489 for records management.
- **Streamlined Knowledge Sharing**: Foster collaboration and information exchange across teams.

Targeted Groups

This course is ideal for:

- **Records Managers**
- **Document Control Professionals**
- **Information Security Specialists**
- **Enterprise Content Management Professionals**
- **Administrative Staff**

Course Objectives

By the end of the EDMS training, participants will be able to:

1. Develop a strategic plan for records improvement processes.
2. Align records management programs with corporate goals.
3. Contribute to enterprise content management initiatives.
4. Prepare their organization for Information Governance beyond IT Governance.
5. Balance privacy and accessibility requirements for records management.

Targeted Competencies

Participants will gain expertise in:

- Records Management
- Document Control
- Information Management
- Data Security
- Electronic Archiving

Course Content

Unit 1: Introduction to EDMS

- Benefits of an EDMS.
- Key concepts and drivers of Engineering EDMS.
- Addressing the paper flood and envisioning a paperless office.
- Developing document management policies and procedures.

Unit 2: EDMS Components and Document Capture, Distribution, and Browsing

- Document scanning techniques.
- Exploring OCR and image processing.
- Practical demonstrations.
- Indexing, archiving, and retrieval processes.
- Strategic planning for records and archive services.

Unit 3: Strategy and Key Elements

- Crafting a document and records management strategy.
- Foundations of information governance.
- Familiarity with key terminology.
- Management of information assets.
- Overview of ISO 15489 Parts 1 and 2.

Unit 4: Paper Records Processing System

- The role of paper organization in records management.
- Alternatives to paper and email routing.
- Assessing storage and filing system efficiency.
- Classification and indexing for paper-based storage.

Unit 5: Concepts and Setup Components

- Developing classification schemes.
- Effective search and retrieval methodologies.
- Enforcing controls and ensuring security.
- Managing the lifecycle of documents and records.
- Preservation, archiving, and content management.
- Understanding legislation, standards, and regulations.

Unit 6: Document Management

- Implementing document control measures.
- Tracking revisions, versions, and audit trails.
- Producing impactful reports.
- Live demonstrations of EDMS systems.

Unit 7: Document Distribution

- Workflow management frameworks.
- Applications in EDMS.
- Document creation and tracking processes.
- Fundamentals of electronic mail systems.

Unit 8: Document Browsing

- Navigation techniques within EDMS.
- Utilizing application-independent viewers.
- Annotation processes: sticky notes and redlining.

Conclusion

Participants completing this course will receive an **EDMS Certification**, signifying their proficiency in managing electronic documents and records. With a focus on reducing reliance on physical documentation, this training prepares professionals to leverage technology for improved efficiency, compliance, and organizational success.

Embark on this transformative journey to master EDMS and become a key contributor to your organization’s digital evolution.