

€ TRAINING

Electronic Document Management Systems
(EDMS)





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Introduction:

A document management system is a computer system used to track and store electronic documents. It is usually capable of keeping track of the different versions modified by different users. The term has some overlap with the concepts of content management systems. It is often viewed as a component of enterprise content management systems and related to digital asset management, document imaging, workflow systems, and records management systems. This course shows participants how to deal with documents in an electronic way to get rid of the papers hard copy which takes a lot of space and time.

Course Objectives:

At the end of this course the participants will be able to:

- Manage/control documents, including folders and forms, reduce document distribution costs -no more paper
- Distribute and view documents costs -no more paper
- Scan, OC, indexing, and archiving paper documents
- Automate other office functions that involve workflows and electronic mail
- Address requirements of ISO 9000 and other regulatory agencies
- Understand different technologies involved in EDMS
- Manage EDMS projects and justify ROI
- Get hands-on training on some EDMS products
- Evaluate merging standards

Targeted Audience:

- Information and Records Managers/ their employees
- HR officials
- Administrative staff
- Staff involved in the day to day management of document and records management
- Supervisors of all industries who are interested in learning about tomorrow's technologies for a paperless working environment and minimizing the volume of paper

Course Outlines:

Unit 1:

- The changing information landscape
- The digital challenge
- Information management in the digital age
- The need for EDMS and EDRMS
- Differences between document and records management

Unit 2:

- EDMS or EDRMS for your organization? Bespoke Assessment based on business activities
- EDMS/EDRMS within the context of Information Risk
- ISO 9000 & others Regulatory Requirements
- The functional difference between EDMS and EDRMS
- Implementing EDMS/EDRMS Change Management as part of the implementation

Unit 3:

- Types of document and records management systems
- Implementing EDMS/EDRMS: strategies and policies
- Change management as part of the implementation
- Tangible benefits of EDRMS implementation
- Technology options

Unit 4:

- Off - the-shelf vs. custom systems
- Allocating resources: who needs to be involved for a successful rollout?
- Authoring SystemsCard/folio based systems and scanning functionalities
- Updating and data migration between systems
- Data handling and digital continuity within the context of EDMS/EDRMS

Unit 5:

- Demonstration of a live EDRMS system
- Carrying out business activities in an EDRMS system
- Practical issues in EDRMS use

Unit 6:

- Documents on demand: a new model for document management
- Comparison of on-demand / on-premise models for document management
- Multimedia documents
- Extracting information from documents: a computer vision approach
- Managing compound documents

Unit 7:

- Workflow and document management
- Business process management - an overview
- Intelligent business process management & document interaction
- An example: implementation alternatives of a vacation workflow
- Top content management software products

Unit 8:

- Document security - authentication, authorization, and audit

- Document security - digital right management perspective
- Digital signatures
- Document retrieval
- Automatic document categorization

Unit 9:

- Design guidelines for document imaging implementation
- Overview of scanner technologies
- Document capture software
- Image enhancement techniques & benefits
- Document quality metrics

Unit 10:

- Central management of distributed document-centric processes
- Document viewers & right-based annotation capabilities
- Improving document security with biometric right management