MERCURY

Diploma in Electronic Document Management System for the Petroleum Industry

3 – 7 May 2027
Cape Town (South Africa)



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Ref: 15243_1062695 **Date:** 3 – 7 May 2027 **Location:** Cape Town (South Africa) **Fees:** 5300 Euro

Introduction:

The oil and gas industry necessitates intricate communication channels due to the dispersion of its workforce across various geographical locations. Effective interaction with contractors, suppliers, and other stakeholders is essential to relay information seamlessly. Implementing an electronic document management system EDMS enhances collaboration by establishing a robust file and information-sharing procedure.

This curriculum caters to professional document controllers in the petroleum industry, endeavoring to manage oil and gas records proficiently. These records are crucial for project teams that frequently reference procedures, policy documents, and compliance reports.

The team must regularly amend, update, and disseminate the revised data. Centralizing documents, such as contracts and proposal files, streamlines accessibility for consultation and amendments by the involved parties. Moreover, it facilitates planning and collaboration to achieve adherence to industry standards and regulations.

Targeted Groups:

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

Course Objectives:

By the end of this electronic document management system diploma in oil and gas industry course, participants will be able to:

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- Manage/control documents, folders, and forms, and trim document distribution costs—eliminating the need for paper.
- Scan, OCR, index, and archive paper documents.
- Automate various office functions involving workflows and electronic mail.
- Fulfill the requisites of ISO 9000 and other regulatory bodies.
- Comprehend the various technologies encompassed in EDMS.
- Engage in practical training on select EDMS products.
- Appraise emerging standards.

Targeted Competencies:

Upon the end of this electronic document management system diploma in oil and gas industry training, participants will be able to:

- Document control.
- OCR Optical Character Recognition.
- Data management.
- Data control.
- Data security.

Course Content:

Unit 1: Introduction to EDMS in the Petroleum Industry:

- EDMS - understanding its essence and the advantages of electronic document management systems.
- The inundation of paperwork and the paradigm shift toward a paperless office.
- Document capture.
- Scanning of documents.
- OCR and image processing.
- Explore Indexing, archiving, and the retrieval process.
- Practical demonstrations.
- Document management.

Unit 2: Document Control in Petroleum Industry EDMS:

- Management of revisions, versions, and document histories.
- Understand the importance of audit trails and reports in the petroleum oil and gas sector.
- Create, fill, and preserve forms and data.
- Explore the role of document distribution in workflow management.
- Know the best practices for tracking and ensuring the closure of documents.
- Understand the applications of document management systems in petroleum industry projects.

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

- Implement applications and the document creation process.
- Understand methods for tracking and closure in workflow management.
- Learn about electronic mail concepts and their use in document distribution within the petroleum sector.
- Explore document browsing, navigation, and viewer applications.
- Annotate and redline documents to meet ISO 9000 and other regulatory requirements.
- System architectures encompassing LANs, WANs, and Client-Server Models within the industry.

Unit 4: Technology and Implementation Options for EDMS:

- Discuss encryption techniques for document protection.
- Examine authoring systems and card/folio-based systems.
- Know the available types of documentation systems for EDM oil and gas.
- Undertake the implementation strategies for EDMS within the petroleum industry.
- Weighing the benefits of off-the-shelf vs. custom EDMS solutions.
- EDMS management, updating systems, and anticipating future advancements.
- Understanding document processes through diagrams, management flows, and role responsibilities.
- Evaluate potential process measurements Key Performance Indicators - KPIs and the RACI MATRIX.

Unit 5: Data Security in EDMS:

- Create backups and restoration methods for high-stakes petroleum data.
- Explore top document management software products and their applications in oil and gas.
- Align document management protocols with ISO standards for document creation templates.
- Address security requirements through different security levels, as illustrated by case studies like TREENO ADVANCED SECURITY AND AUDIT.