MERCURY

Electronic Document Management System (EDMS) Course

30 August – 3 September 2027
Munich (Germany)

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Ref: 9031_1079776 **Date:** 30 August – 3 September 2027 **Location:** Munich (Germany) **Fees:** 5600 Euro

Introduction:

Information, no matter how it is initially produced or collected, is becoming an increasingly valuable asset for organizations today. Simultaneously, the requirements to archive information are becoming more complex. The EDMS electronic document management systems course is challenging in finding an efficient approach to archiving information across all material aspects of its lifecycle, from its creation to its defined destruction.

At the same time, establishing such an efficient approach is essential, with benefits in cost-cutting and organizational performance being paramount. This EDMS electronic document management systems training is designed to show participants how to deal with papers electronically to eliminate hard copies, which take a lot of space and time.

Understanding an Electronic Document Management System EDMS:

Before diving deeply into the course outline, it is crucial to comprehend what an electronic document management system EDMS is and its foundational role in modern businesses. An EDMS is a software system that provides tools for managing the creation, capture, indexing, storage, retrieval, and disposal of records and information assets of the organization.

By understanding the definition of an electronic document management system, professionals can better grasp its numerous benefits, such as enhanced security, improved accessibility, better compliance with regulations, and the facilitation of knowledge sharing within an organization.

Targeted Groups:

- Records Managers.
- Documents Controlling Professionals.
- Information Security.
- Enterprise Content Management Professionals.
- Administration Staff.

Course Objectives:

At the end of this EDMS electronic document management systems course, the participants will be able to:

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- Create a strategic plan for a records improvement process.
- Align the records management program with corporate goals and objectives.
- Provide input into the enterprise content management initiatives of their company.
- Prepare their company for Information Governance beyond IT Governance.
- Assist their company in balancing the needs for Privacy versus Accessibility of records.

Targeted Competencies:

At the end of this EDMS electronic document management systems course, the target audience will:

- Records Management.
- Document control.
- Information management.
- Data security.
- Electronic archive.

Course Content:

Unit 1: Introduction to EDMS:

- Understanding the benefits of an electronic document management system.
- Introducing Engineering EDMS key concepts and drivers.
- Addressing the paper flood.
- Envisioning the paperless office.
- Developing document management policies and procedures.

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

- Techniques for scanning documents.
- Exploring OCR and image processing.
- Demonstration of practical applications.
- Indexing, archiving, and retrieval processes.
- Document capture.
- Strategic planning and management for records and archive services.

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Unit 3: Strategy and Understanding Key Elements:

- Crafting a document and records management strategy.
- Foundations of information governance.
- Familiarity with terminology.
- Management of information assets.
- ISO 15489.
- ISO 5489 part 1 and part 2 overviews.
- Introduction to document and records management.

Unit 4: Paper Records Processing System:

- The role of paper desk organization in records management.
- Alternatives to paper and email routing.
- Assessing the efficiency of information storage and filing systems.
- Classification, cross-references, and indexing systems for paper-based storage.

Unit 5: Concepts and Setup Components:

- Developing classification schemes.
- Searching and retrieving methodologies.
- Enforcing controls and ensuring security.
- Utilizing metadata and indexing techniques.
- Managing the documents and records lifecycle.
- Capturing, storing, and managing contents.
- Phase of preservation and archiving.
- Presenting and delivering documents.
- Comprehending legislation, standards, and regulation.
- Understanding other sources of documents.
- Word processors/spreadsheets.
- Forms.

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Unit 6: Document Management:

- Implementing document control measures.
- Tracking revisions, versions, and histories.
- Generating audit trails.
- Producing impactful reports.
- Live demonstration of systems.
- Forms Management.
- Creating forms.
- Filling and saving forms/data management.

Unit 7: Document Distribution:

- Executing workflow management frameworks.
- Overview of applications involved with EDMS.
- Processes for the creation of documents.
- Tracking/closure.
- Interactive demonstration of EDMS functionality.
- Fundamentals of electronic mail systems in EDMS.
- Concepts.
- Demonstration.

Unit 8: Document Browsing:

- Navigation techniques within EDMS.
- Using application/independent viewers.
- Annotation processes, including sticky notes and redlining.

Conclusion:

Throughout the course, participants will gain a comprehensive understanding of the electronic document management system EDMS and undergo training that culminates in an EDMS certificate, symbolizing their new expertise in reducing dependence on physical documentation and leveraging technology for enhanced business efficiency.