MERCURY

Diploma in Projects Final Closeout Documentation & Advanced EDMS

15 – 19 August 2027
Cairo (Egypt)



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Ref: 4118_1082931 **Date:** 15 – 19 August 2027 **Location:** Cairo (Egypt) **Fees:** 3500 Euro

Introduction:

The closeout document aims to assess the project performance, identify the lessons learned, and confirm that essential contractual and other project closure activities have been completed. The document also formalizes the transfer of assets, deliverables, and all ongoing administrative functions to an in-service business organization. This organization must commit to measuring the benefits and outcomes of the project's product, result, or service.

Participants in the diploma in projects final closeout documentation and advanced EDMS learn that the closure document is intended to summarize the project record. This EDMS document management course will teach you to determine the number of sections and the amount of content in each section, which should reflect the outcomes of the project and the purpose for which it was undertaken.

This EDMS electronic document management system training program will teach about documenting Projects' Final Closeout Documents. In the second part of this program, there will be very advanced details, techniques, and information about Electronic Documents Management Systems EDMS and documents management, which will help you to manage the whole process efficiently.

Understanding Enhancing Project Closeout and EDMS Expertise:

Understanding the intricacies of project closeout documentation is crucial for accurately capturing the outcomes and lessons learned from projects. Equally important, an electronic document management system EDMS streamlines document handling, storage, and retrieval, leading to heightened efficiency and security within an organization.

This EDMS electronic document management system program provides advanced education on both facets, blending practical demonstrations with expert-led discussions to arm professionals with the necessary skills to manage project closeouts and implement effective EDMS solutions.

With the knowledge gained from this diploma, personnel from various fields, such as document control, information security, and IT management, can execute their responsibilities with greater competency and precision, showcasing the profound advantages of an integrated approach to document management and project execution.

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Targeted Groups:

- Personnel moving into leadership roles to embrace better controls for managing paper and electronic documents.
- Information security professionals.
- Document controllers and administrators.
- Document and records management personnel.
- Document management supervisors.
- Suppliers, solution providers, and vendors.
- Executives.
- Users of document and records management.
- Personnel seeking to enhance their skills.
- IT management.
- Technical staff.

Diploma Objectives:

By the end of this diploma in project closeout and advanced EDMS, participants will be able to:

- Develop a project closeout plan.
- Prepare a project closure report.
- Identify and address common project closeout problems.
- Manage the risk of lost information and paperwork.
- Understand the development of a comprehensive project closeout checklist.
- Master project document control procedures.

Targeted Competencies:

At the end of this diploma in project closeout and advanced EDMS, the target competencies will be able to improve:

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- Document control procedures and specifications.
- Utilization of project closeout checklist samples.
- Conduct effective project review meeting samples.
- Create detailed project closeout report samples.
- Executing project experiment closeout samples.
- Application of project closeout form samples.
- Review of samples project closeout.

Diploma Content:

Unit 1: Electronic Document Management Systems EDMS:

- Understanding the challenge of the paper flood.
- The concept of the paperless office.
- Techniques for document capture, including scanning of documents.
- Implementation of OCR and image processing for efficient retrieval.
- Strategies for indexing, archiving, and retrieval systems.
- Interactive demonstration of these processes.
- Use of word processors/spreadsheets in electronic document management.
- Forms management and optimization for EDMS.

Unit 2: What Is an Electronic Document Management System:

- Comprehensive definition and understanding of document management.
- Streamlined document control processes.
- Robust management of revisions/versions/histories within EDMS.
- Ensuring transparency and security with audit trails.
- Creating insightful reports through EDMS.
- Practical demonstration showcasing EDMS utility.
- Manage forms and ensure information accuracy in EDMS.

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Unit 3: EDMS Electronic Document Management System:

- Best practices in creating forms within EDMS.
- Practical strategies for filling and saving forms/data.
- Optimizing document distribution via workflow management.
- Understand the diverse applications of EDMS in business processes.
- Advanced creation of documents for specialized needs.
- Tracking/closure of documents and document-based projects.
- Demonstration of real-world usage of an EDMS.

Unit 4: Project Closeout Documents:

- Overviews of applications of project closeout documents.
- Steps involved in the creation of a robust project closeout document inventory.
- Efficient tracking/closure techniques.
- Utilizing document distribution through electronic mail: concepts and demonstration.
- Exploration of document browsing for easy navigation and information retrieval.

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Unit 5: As-Built and Final Documentation:

- Use of application/independent viewers for as-built document examination.
- Leveraging annotation/sticky/notes/red/lining for document markups.
- Adherence to ISO 9000 and other regulatory requirements.
- Review of system architectures and platforms: LANs and WANs and client-server architectures.
- Assessment of various technology options needed for managing electronic documents.
- Ensuring document security with encryption.
- Understanding different authoring systems, including card/folio-based systems.
- Categories of documentation systems and their utilization.
- Steps for implementing a robust EDMS for your organization.
- Understanding the difference between off-the-shelf vs. custom systems.
- Planning for allocating resources required for an EDMS.
- Best practices for EDMS management.
- Strategies for updating the system and staying current.
- Review of future topics, anticipating technology changes.
- Advantages of using documents on demand for accessibility.
- Integration of multimedia documents within document management systems.

Unit 6: Process Context and Flow Electronic Document Management System EDMS:

- Designing a process context diagram for sound document management.
- Streamlining process flow for optimized document handling.
- Defining roles and responsibilities of personnel involved in document management.
- Establishing potential process measurements KPIs to track performance.
- Implementing a RACI matrix for clear accountability.
- Protocols for creating backups and restoring data as part of risk management.
- Evaluation of the top document management software products available in the market.
- Follow best practices in document management procedures based on ISO standards and create document creation templates.
- Implementing multiple security levels: case of TREENO ADVANCED SECURITY AND AUDIT.