

# Certified Courses



# Engineering Electronic Document Management Systems (EDMS)

## INTRODUCTION

- This highly engaging and hands on Engineering Electronic Document Management Systems training course covers all the essential factors to understand, procure, select, develop and implement engineering and operational Electronic Document Management Systems (EDMS) including addressing compliance, policy, security, document control procedures and best practise international standards including ISO 9001, ISO 27001 and ISO 15489.
- This training course covers business activities and good standards in document management, scanning and indexing, document control, audit, administration filing, version management, management of documentation, searching, archiving and document management principles, systems and compliance standards in accordance to ISO and other leading document management standards.

**Participants attending the Engineering Electronic Document Management Systems (EDMS) training course will develop the following competencies:**

- Develop key skills in implementing Electronic Document Management Systems that are focused on Engineering, Project and Operational Business Processes
- Learn a detailed overview of policies and procedures relating to document control, administration, filing, documentation and document management and improvement within Engineering, Operational and Services business areas
- Review of IT systems for document control and management specifically for Engineering Departments
- Creating scanning and archiving procedures, review legal issues, information compliance regulations and management approval and digital signatures
- Focus on the need to create good document policy, procedures and standards with hands-on drafting, workshops and case studies in groups

## PROGRAMME OBJECTIVES

- Create, develop and put in action document control, auditing and compliance course for Engineering and operational work
- Review the security requirements and put together controls for managing confidential and private documents
- Provide an understanding of how good filing systems are developed
- Consider who needs to be involved in the process of developing such filing systems
- Investigate issues concerning the lack of good filing and documentation standards
- Improve filing and documentation standards
- Improve manual hardcopy and softcopy filing systems
- Introduce document management practices and standards
- Review ISO standards for documentation management

## WHO SHOULD ATTEND?

- Professionals who work in
- Engineering
- Operations
- Projects and IT Management
- IT Support and Operations
- Technical Staff
- Professionals who are responsible for compliance, regulations and best practices
- Procurement Operational Management Personnel
- Process Supervisors
- Executives
- Team Leaders
- Personnel seeking to enhance their skills

## TRAINING METHODOLOGY

- Participants on the Engineering Electronic Document Management Systems (EDMS) training course will learn by active participation through the use of a wide variety of instructional techniques. The intention is that the trainer will explain issues, using real examples, but will then involve the delegates in discussion, using the information provided. Examples of procedures will be used.
- There will be group exercises to allow for a “hands on” approach to learning. Case studies will be utilised to present “best practices” approaches. In addition there will be in depth discussion of critical success factors.
- Delegates are encouraged to bring real problem examples with them, for discussion on a confidential basis, and to share their experience of particular issues in their company or industry. Time will be allowed for general discussions, and for one-to-one discussion with the trainer.

## PROGRAMME SUMMARY

- The Engineering Electronic Document Management Systems (EDMS) training course covers all the essential skills needed to understand, use and apply Electronic Document Management Systems in an Engineering environment. There will be discussions on the use of software, best practice implementation as well as applying all the key concepts.
- This training course will concentrate on the skills required to effectively deploy and maximise the benefit of electronic document management, archiving, version control and storage within Engineering departments as well as manage the outcomes and deliver business benefits. All participants will return to their organisations with a detailed understanding and have developed action plans to implement electronic archiving successfully in their organisations.

## PROGRAM OUTLINE

### Introduction to Engineering EDMS

- Introduce Engineering EDMS key concepts and drivers
- Document Management policies and procedures
- Indexing, taxonomy and classification
- Version control, audit and managing Metadata
- Implementing solutions for compliance, ISO standards and regulations

### Roles and Responsibilities

- Developing key roles for managing EDMS
- Improving business process re-engineering and business processes
- What needs to be included and workflow
- Who needs to be involved and approval processes
- Management support, review and security approvals

### Designing Document Management Procedures and Systems

- Design overview
- Creating documentation control procedures based on ISO standards
- Creating classifications, taxonomies, retention requirements and filing systems
- Setting up security controls and reviewing information security ISO 27001
- Document management approval process

### IT, Standards and Implementation

- Review of IT Document Management Systems
- Procuring an EDMS
- Developing requirements for EDMS
- Implementation Best Practices

## Case Studies and Workshops

- Reviewing and Developing an Action Plan
- The future look at EDMS
- Case Studies
- Drafting Exercises
- Final Wrap-up and Discussion



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