XCELERATE TRAINING INSTITUTE

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OFFICE ADMINISTRATION

Electronic Document Management System (EDMS) Training Course

DURATION	LANGUAGE	FORMAT
10 days	English	Classroom / Online

Upcoming dates

Dates	Venue	Format	Fee
4 – 15 Jan 2027	Live online	Online (live)	€1,800
8 – 19 Feb 2027	London	Classroom	€7,200
12 – 23 Jul 2027	Live online	Online (live)	€1,800

Register or ask a question

Online: staging.x8ti.com/course/electronic-document-management-system-edms-t…

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Electronic Document Management System (EDMS) Training Course

Introduction

Does your organization manage a large number of documents? Is your document control process too complex? Implementing an Electronic Document Management System (EDMS) can simplify and streamline document control.

An EDMS ensures that only the latest, correct, and approved documents are in circulation, preventing the use of outdated or incorrect documents that can cause confusion, inefficiency, and financial loss. Companies invest in EDMS to maintain compliance, manage corporate and legal documents, and support digital transformation goals.

This training by Xcelerate Training Institutes is designed to help participants from various departments manage their documentation processes more effectively.

Learning Objectives

By the end of the Electronic Document Management System (EDMS) Training, participants will be able to:

- Grasp the fundamental concepts of Document Management Systems.
- Understand the document lifecycle process.
- Learn unified archiving and indexing procedures.
- Create action plans for document and records management.
- Control the flow of documents within departments.
- Understand scanning, indexing, and archiving concepts.
- Automate office support functions involving documentation.
- Comply with ISO 9000 and other regulatory requirements.
- Explore different EDMS technologies.
- Engage in the automation of business workflow systems.
- Follow proper approval processes in document flow.
- Identify version and revision changes in document history.

Training Methodology

Xcelerate Training Institutes has crafted this training program to be practical and engaging, integrating industry best practices. The program includes lectures, presentations, and hands-on practical sessions. Participants share organizational experiences and actively engage in discussions. The course can be customized to meet specific organizational needs. Xcelerate Training Institutes follows the Do–Review–Learn–Apply Model, with pre-course and post-course assessments to ensure learning objectives are achieved.

Benefits for Your Organisation

Organizations will benefit from:

- Reduced costs for archival, retrieval, and storage of physical documents.
- Faster processing of information in business and financial operations.
- Saving valuable staff time for other tasks.
- Reduced duplication of documents through effective control.
- Minimized errors with automation.
- Centralized access and control for document management.
- Enhanced collaboration and coordination.
- Prioritized document and information security.
- More efficient customer and client services.
- Standardized document formats and filing systems.
- Easier retrieval and access to data and information.
- Adherence to standardization and compliance regulations.
- Encouragement of business process automation.

Benefits for You

Participants will gain:

- Improved organization in assigned tasks.
- Effective time management skills.
- A better understanding of innovation and automation.
- Enhanced coordination and task management abilities.
- Discipline through compliance with regulations.
- Competency management skills.
- Technical proficiency in using EDMS technologies.
- Increased job satisfaction and value in their roles.

Who Should Attend

This course is suitable for:

- Quality document controllers.
- Administrative Document Controllers.
- Security Document Controllers.
- Information and Records Management staff.
- Office clerks and document handlers.
- Digital transformation executives.
- Office Managers.
- Management Assistants and Secretaries.
- Compliance Officers and Auditors.
- Information Security professionals.

- Operations Managers.
- Librarians.

Course Outline

Foundations of EDMS

- Digitalization of information management.
- Definition and importance of EDMS.
- General principles and benefits of EDMS.
- Differences between RMS and EDMS.
- Challenges of EDMS systems.

EDMS Standards and Regulations

- Information and data risk management.
- Quality management system requirements.
- ISO documentation requirements.
- Compliance with ISO 9000 and other regulations.
- Control and management of documents.
- Internal and external audits.
- Addressing non-compliant documents.
- Corrective and preventive action plans.

EDMS Implementation and Framework

- Implementation processes and strategies.
- Quality management systems.
- Analyzing current processes.
- Reviewing and revising existing documentation.
- Managing change and process maps.
- Measuring effectiveness and analyzing outcomes.
- Exploring technology options.

Electronic Document Lifecycle

- Data extraction and capture from documents.
- Registration of documents on EDMS.
- Classification based on confidentiality.
- Storage of physical and digital documents.
- Managing access and permissions.
- Deletion of expired documents.
- Best practices for electronic document management.

EDMS Operations

- Capturing and ensuring data accuracy.
- Document scanning and OCR processing.
- Indexing, archiving, and retrieval methods.

- Handling various types of documents.
- Utilizing multimedia documents.
- Enhancing images and managing revisions.
- Maintaining historical audit trails.
- Form creation and management.
- Document distribution and tracking workflows.

Tools of EDMS

- Automated information capture.
- Federated search and retrieval.
- Collaboration tools.
- Hierarchical file indexing and classification.
- Connected archival methods.
- Automated workflows.
- Security and audit trails.
- Document metadata and version control.
- System-wide integration.

EDMS and Business Operations

- Intelligent business process management.
- Business process automation and workflow systems.
- Workflow integration and identification.
- Technical specifications and implementation procedures.
- Types of documentation systems.
- Innovation and digitalization.
- Industry standards and best practices.

Document Control and Security

- Ensuring document security.
- Implementing multiple security levels.
- Using encryption and authoring systems.
- Managing card and folio-based systems.
- Implementing authentication and authorization.
- Digital rights management and signatures.
- Backups and document restoration.

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Registration Form

Electronic Document Management System (EDMS) Training Course

Preferred dates: ..... Venue or online: .....

Duration: 10 days Language: .....

Please complete and email this form to us, or register online. We confirm your place and send the invoice within one working day.

Delegate information

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Official email: ..... Personal email: .....

Company information

Company name: .....

Address: .....

City / country: ..... VAT / tax number: .....

Person responsible for training & development

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

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☐ Please invoice me ☐ Please invoice my company

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