ADMINISTRATION

CREATIVE CONCEPT

BTS
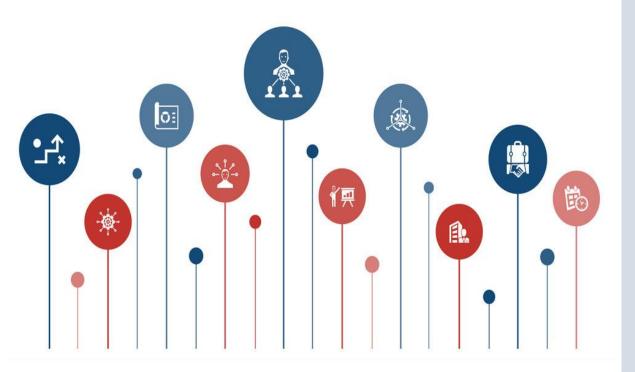Training & Consultancy

Documents & Records Management Masterclass

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Documents & Records Management Masterclass

Introduction:

This course shows you how to deal with papers in an electronic way to get rid of the papers hard copy which takes a lot of space and time. Managing documents and content can be difficult. What is the best way to store and manage the documents and records in your firm? Does your approach meet compliance requirements, regulations and standards? What is the best way to manage electronic documents and records? How do you find the right documents and records when you need them? How does workflow and business process management work with documents and records management to help increase efficiency within your firm?

Who Should Attend?

Administrative personnel, Supervisors, Administration Officers, Secretaries, Administrative Personnel, Clerks, Document Controllers, Executive Secretaries, Administrative Assistants, Assistant Controllers, Data Loaders, Camp Admins, Projects Administrators, Technical Assistants, Office Administrators & Managers, HR Officers, PA's & Secretaries, Records Officers, Events Planners & Designers, Event Managers, Project Coordinators, Customer Service Personnel, Procurement Officers, Support Staff, anyone involved in office management and administration skills and practices, Office Administrators, Office Professionals, Supervisors of clerical and administrative staff, Executive Secretaries, Personal Assistants, Admin Staffs, Document Controllers

Course Objectives:

At the end of this seminar participants will:

- Manage and control documents, including folders and forms reduce document distribution costs –no more paper

- Distribute and view documents costs –no more paper

- Scan, OC, index and archive paper documents

- Automate other office functions that involve work flows and electronic mail

- Address requirements of ISO 9000 and other regulatory agencies

- Understand different technologies involved in EDMS

- Manage EDMS projects and justify ROI

- Get hands-on training on some EDMS products

- Evaluate merging standards

Course Outline:

Introduction: Course Objectives & Outline

- EDMS –what is it and benefits
- The paper flood
- The paperless office

EDMS Components & Document Capture, Distribution & Browsing

- Document capture
- Scanning of documents
- OCR and image processing
- Indexing, archiving and retrieval
- Demonstration

Other Sources of Documents

- Word processors/spreadsheets
- Forms

Document Management

- Document control
- Revisions/versions/histories
- Audit trails
- Reports
- Demonstration

Forms Management

- Creating forms
- Filling and saving forms/data

Document Distribution: Work Flow Management

- Applications
- Creations
- Tracking/closure

- Demonstration

Document Distribution: Electronic Mail

- Concepts
- Demonstration

Document Browsing

- Navigation
- Application/independent viewers
- Annotation/sticky/notes/red/lining
- Demonstration
- ISO 9000 & others regulatory requirements

System Architectures & Platforms

- LAN`s & WANs
- Client server architectures

Technology Options

- Authoring Systems
- Card/folio based systems

Emerging Standards in EDMS

- Types of documentation systems
- On-line help system
- On –line coaches and tutorials
- On –line documentation

- Glossaries

Some Representative EDMS Products

- Implementing EDMS
- Off – the-shelf vs. customs systems
- Allocating resources
- EDMS management
- Updating system
- Future topics
- Documents on demand
- Multimedia documents