



COR Concepts
Information Management
Consulting

Duration: 5 days
Course ID: ERM003

Introduction

This programme is designed to equip delegates with the hands-on skills necessary to understand, plan for implement and use an Electronic Document and Records Management System (EDRMS).

The course uses Microsoft SharePoint as the platform but is designed to teach electronic document and records management implementation issues in a manner which applies to any system. It is product-neutral and highlights the typical activities one would expect in a live environment. Users will be able to create templates, documents, workflows, records, and simulate working with real documents, including a live scanning environment.

HANDS-ON ELECTRONIC DOCUMENT & RECORDS MANAGEMENT SYSTEMS TRAINING

Facilitators:

The COR Concepts facilitators are specialists in the field of Electronic Document, Records and Information Management. Most of our Records Management facilitators have worked at one of the Provincial or National Archives and Records Services and are carefully selected to deliver the most value to assist you in applying the course content to your organisations. Our EDRMS facilitators all have extensive experience in the design and/or implementation of these systems.

Who Should Attend:

- Records Managers
- Secretaries and Personal Assistants
- IT staff involved in implementing EDRMS systems
- Business unit managers responsible for document and records management
- Document controllers
- Business and systems analysts on the EDRMS project
- Departmental managers responsible for
- Records Management

Outcomes:

At the end of this workshop, delegates will:

- Have learned how to scan authentic images .
- Create new document and record types, with appropriate index fields.
- Understand the core components that make up an EDRMS system.
- Create document templates and workflows
- Implement a classification scheme .
- Have a working knowledge of how to use different types of electronic signatures.
- Create and work with simple documentcentric workflows.
- Create approval processes, and implement proper document controls, with check-in and out, and version controls.

With the assistance of your expert facilitators, you will be equipped with practical hands-on experience in using your new electronic document and records management system. This training programme will, through the hands-on exercises, practical exercises and group discussions, empower you to apply EDRMS principals to ensure data integrity, quality and security. The course will equip you to understand and use the various tools that make up an EDRMS.

COURSE OUTLINE



Overview:

- Optical Character Recognition.
- What is electronic document and records (OCR)/Intelligent Character Recognition management (ICR).
- Scanning and imaging.
- Searchable pdfs.
- Document management.
- Image management.
- Document Control.
- Indexing.
- (Check in and check out).
- Quality control.
- Version control.
- Document Co-authoring.

Search and retrieval

- Electronic signatures.
- Understanding search.
- Templates.
- Finding and retrieving documents.
- Records management.
- Storing, saving and creation of versions.
- Metadata.
- Workflow.

Document management

- Forms design and management.
- Creating a template.
- Output management.
- Use of Microsoft Word Properties and Quick.
- Case management parts.
- Publishing: Intranets and portals.
- Using Word effectively for document control.
- Managing changes and document.

Libraries and repositories

- Comparisons.
- Content types.
- Commenting.
- Things to consider.
- Version control.
- Sites.
- Check in and out.
- Document sites.
- Document co-authoring.
- Record sites.
- Publishing.
- Meeting sites.
- Document sets.
- My sites.
- Reports.

Electronic signatures

- Navigation.
- Different types.
- Scanning and adding signatures.

Users and Permissions

- Getting and using a third party signature.
- Permissions and access control.
- Creating new users.

Forms management

- Components of a form.

Document and record types

- Creating forms.
- Document identification and types.
- Publishing forms to a library.
- Index fields and metadata.
- Using forms in a workflow.
- Tags.

COURSE OUTLINE (CONT.)



Workflow Scanning and imaging

- Types of workflows.
- Document preparation.
- Creating a workflow.
- Batches.
- Starting workflows.
- Document types.
- Using templates in a workflow.
- Index fields.
- Participating in workflows.
- Use of bar codes.
- Tasks.
- Automated indexing.
- Document approval using workflows.

Records management

- Creating and using Retention policies
- File plan and business classification schemes
- Archiving
- Declaration of records
- Manually
- Via workflow
- Migration to other locations, repository, record library or archive
- Disposals
- Physical records
- Hybrid records
- Records metadata

Output management

- Publishing output from other systems to the document repository.
- Searching and retrieving these documents.

Case management

- Managing different document types about a specific person or case
- Using search and metadata
- Search sites
- Saved searches
- Using tags
- Managing Human resource files as case files using document sets
- Managing procurement (Supply chain) documents

Publishing

- Create a publishing process
- Publishing Policies and procedures
- Approval processes for publishing
- Intranet — viewing policies



REGISTER TODAY!

Call: +27 12 003 6637 or +27 83 651 7600 or
Complete the registration form and e-mail to gerry@corconcepts.co.za

REGISTRATION INFORMATION



Company Name:				VAT No.:	
Postal Address:					
Telephone No.:				Fax No.:	
E-mail Address:				Purchase Order No.:	
No.	Title	Delegate Name	Designation	E-mail	Cell No.
1.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
2.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
3.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
4.					
☐ Yes, please update me with relevant information					
No.	Title	Delegate Name	Designation	E-mail	Cell No.
5.					
☐ Yes, please update me with relevant information					

COR Concepts Cancellation and Postponement Policy

In the event that COR Concepts cancels an event, delegate payments will be refunded. In the event that COR Concepts postpones an event, delegate payments at the postponement date will be credited towards the rescheduled date. If the delegate is unable to attend the rescheduled event, the delegate will receive a 100% credit representing payments made towards a future event. This credit will be available for up to one (1) year from the date of issuance. No refunds will be available for postponements. COR Concepts is not responsible for any loss or damage as a result of a substitution, alteration or postponement of an event. COR Concepts shall assume no liability whatsoever in the event this training course is rescheduled or postponed due to fortuitous event, Act of God, unforeseen occurrence or any other event that renders performance of this training course impracticable or impossible. For purposes of this clause, a fortuitous event shall include, but not be limited to: war, fire, labour strike, extreme weather or other emergency.

TERMS AND CONDITIONS

Delegate Cancellations

All delegate cancellations must be received in writing and are subject to the following conditions:

- For any cancellations received 20 working days before the start of the training course, COR Concepts will issue 100% credit for the value paid to be used for up to one year from the date of issue for any further COR Concepts training course;
- For any cancellation received less than 20 working days before the date of the training course, the full fee will be payable and no refunds or credit notes will be given;
- If a registered delegate does not cancel and fails to attend the training course, this will be treated as a cancellation and no refund or credit note will be issued;
- Delegate substitutions are welcome. Please notify us 5 days before the event.

Payment Method : Direct Deposit

An invoice will be generated once the registration form is received.

Confirmation

Your registration will only be confirmed once payment is received and may be subject to cancellation.

Right of Admission

COR Concepts reserves the right to refuse admission to the training course where evidence of full payment cannot be shown.

Delegate Substitutions

Application for Registration & Acceptance of Terms & Conditions

I acknowledge that I have read and understood all of the Payment Methods, Policies and Terms and Conditions (including payment terms) and hereby apply for registration on behalf of myself (if a single delegate) or on behalf of the under mentioned organization which I am duly authorised to represent.

Name: _____

Organization : _____

Job Title: _____

E-mail: _____

Signature : _____ Date : _____



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