

ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT (EDRM)



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Introduction

In today's digital age, organizations generate vast amounts of electronic documents and records. Effective management of these digital assets is essential for ensuring compliance, facilitating information retrieval, and safeguarding sensitive data. This intensive five-day program, offered by Gentex Training Center, equips participants with the knowledge and skills necessary to implement and manage robust Electronic Document and Records Management (EDRM) systems. Through a comprehensive exploration of EDRM principles, best practices, and industry standards, participants gain the ability to streamline document workflows, ensure data integrity, and contribute significantly to organizational information governance.

Electronic Document and Records Management (EDRM) Course Objectives:

- Master core principles and concepts of Electronic Document and Records Management (EDRM).
- Understand the lifecycle of electronic documents and records within an EDRM framework.
- Develop a comprehensive understanding of key EDRM functionalities (capture, classification, storage, retrieval, disposition).
- Employ best practices for document capture, indexing, and metadata creation for efficient retrieval.
- Utilize classification schemes and taxonomies to organize electronic documents and records effectively.
- Explore various electronic recordkeeping strategies (active, inactive, archival) and retention requirements.
- Implement access controls and permission settings for secure information management within the EDRM system.

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- Analyze the role of EDRM in ensuring compliance with relevant regulations and legal requirements.
- Evaluate and select appropriate EDRM software solutions based on organizational needs.
- Develop strategies for system implementation, user adoption, and change management within the organization.
- Analyze real-world case studies of successful EDRM implementations.
- Formulate a personalized action plan to implement effective EDRM practices in your organization.

Course Methodology

This interactive program utilizes a participant-centric approach. It blends lectures from EDRM experts, real-world case studies, group discussions, and hands-on workshops. Participants actively engage in EDRM system demonstrations, document classification exercises, scenario-based activities for applying EDRM principles, and peer review sessions. Through experiential learning, participants gain the practical skills and theoretical knowledge needed to navigate the complexities of electronic document and records management, fostering improved information governance and organizational efficiency.

Who Should Take This Course

- Information and records management professionals seeking to enhance their EDRM knowledge and skills.
- Business analysts and IT professionals involved in EDRM system implementation and management.
- Administrative staff and department managers seeking to improve electronic document organization and retrieval practices.
- Anyone aspiring to contribute to a more efficient and compliant information management environment within their organization.





Electronic Document and Records Management (EDRM) Course Outline:

Day 1: The Digital Landscape: Understanding EDRM Principles

- Exploring Core Principles and Concepts of Electronic Document and Records Management (EDRM)
- Understanding the Lifecycle of Electronic Documents and Records Within the EDRM Framework
- Examining the Role of EDRM in Information Governance and Compliance

Day 2: Capturing, Classifying, and Organizing: Building the Foundation

- Mastering Best Practices for Document Capture, Indexing, and Metadata Creation
- Utilizing Classification Schemes and Taxonomies for Effective Document Organization
- Implementing Strategies for Version Control and Record Retention Management

Day 3: Security and Access Control: Safeguarding Information Assets

- Understanding Access Controls and Permission Settings for Secure Information Management
- Employing EDRM Features to Ensure Data Integrity, Auditability, and Long-Term Preservation
- Exploring Security Best Practices for Protecting Electronic Documents and Records



Day 4: Technology and Implementation: Selecting and Deploying Solutions

- Evaluating and Selecting Appropriate EDRM Software Solutions Based on Organizational Needs
- Developing Strategies for System Implementation, User Adoption, and Change Management
- Exploring Integration Opportunities with Existing Business Systems

Day 5: Learning from the Best: Case Studies and Action Planning

- Analyzing Real-World Case Studies of Successful EDRM Implementations
- Exploring Emerging Trends and Technologies in Electronic Document and Records Management
- Formulating a Personalized Action Plan to Implement Effective EDRM Practices in Your Organization

Conclusion

By successfully completing this comprehensive program offered by Gentex Training Center, participants gain the knowledge and practical skills needed to become valuable contributors to an efficient and compliant Electronic Document and Records Management (EDRM) system. They will be equipped to streamline document workflows, ensure information security, and empower their organizations to leverage the full potential of their digital assets. This enhanced knowledge fosters better information governance practices, contributing to improved decision-making, risk mitigation, and organizational efficiency.