COURSE OVERVIEW IE0198
Professional Certificate in Electronic Document & Records Management (EDRM)

Course Title
Professional Certificate in Electronic Document & Records Management (EDRM)

Course Reference
IE0198

**Course Duration/Credits**
Five days/3.0 CEUs/30 PDHs

Course Date/Venue

Session(s)	Date	Venue
1	August 04-08, 2024	Al Aziziya Hall, The Proud Hotel Al Khobar, Al Khobar, KSA
2	September 22-26, 2024	Boardroom, Warwick Hotel Doha, Doha, Qatar

Course Description

This practical and highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using one of our state-of-the-art simulators.
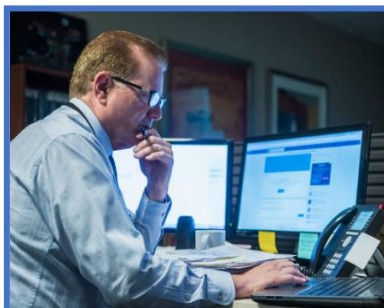
This course is designed to provide participants with a detailed and up-to-date overview of Professional Certificate in Electronic Document & Records Management (EDRM). It covers the importance of EDRM and the difference between documents and records; the legal, regulatory and compliance issues affecting electronic records management; the principles of effective EDRM, EDRM systems and steps for developing and implementing an effective EDRM strategy; the lifecycle of documents from creation to disposal; and the techniques for controlling and managing versions of electronic documents.

Further, the course will also discuss the sharing and collaboration of documents while ensuring security and control; the importance of metadata and indexing in the organization; searching and retrieval of electronic documents; the common document formats and considerations for their use in EDRM; the security measures for electronic documents, records inventory, classification and retention and disposal schedules; and the features and functionalities of ERMS and the strategies for long-term preservation of electronic records.

During this interactive course, participants will learn auditing electronic records and generate compliance and management reports; integrating EDRM into broader information governance frameworks and manage emails as records; the benefits and challenges of cloud-based EDRM solutions and the emerging technologies in EDRM; the risk management in EDRM, develop an EDRM policy, manage organizational change and train users on EDRM systems; the best practices and guidelines for effective management of electronic documents and records; and develop an action plan for implementing or improving EDRM in the organization.

Course Objectives

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain good working knowledge on electronic documents and records management (EDRM)

- Discuss the importance of EDRM and the difference between documents and records

- Explain the legal, regulatory and compliance issues affecting electronic records management

- Recognize the principles of effective EDRM, EDRM systems and steps for developing and implementing an effective EDRM strategy

- Illustrate the lifecycle of documents from creation to disposal including the techniques for controlling and managing versions of electronic documents

- Share and collaborate documents while ensuring security and control

- Discuss the importance of metadata and indexing in the organization, search and retrieval of electronic documents

- Identify the common document formats and considerations for their use in EDRM

- Employ security measures for electronic documents, records inventory, classification and retention and disposal schedules

- Discuss the features and functionalities of ERMS and the strategies for long-term preservation of electronic records

- Audit electronic records and generate compliance and management reports

- Integrate EDRM into broader information governance frameworks and manage emails and records

- Recognize the benefits and challenges of cloud-based EDRM solutions and the emerging technologies in EDRM

- Apply risk management in EDRM, develop an EDRM policy, manage organizational change and train users on EDRM systems

- Carryout best practices and guidelines for effective management of electronic documents and records

- Develop an action plan for implementing or improving EDRM in the organization

Exclusive Smart Training Kit - H-STK®

*Participants of this course will receive the exclusive "Haward Smart Training Kit" (**H-STK®**). The **H-STK®** consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.*

Who Should Attend

The course is intended for those who are required to store data for long term storage and is applicable to all business organizations that are interested for a paperless system.

Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

30% Lectures
20% Practical Workshops & Work Presentations
30% Hands-on Practical Exercises & Case Studies
20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

Course Fee

Al Khobar	**US$ 5,500** per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.
Doha	**US$ 6,000** per Delegate. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking

Course Certificate(s)

(1) Internationally recognized Competency Certificates and Plastic Wallet Cards will be issued to participants who completed a minimum of 80% of the total tuition hours and successfully passed the exam at the end of the course. Certificates are valid for 5 years.

Recertification is FOC for a Lifetime.

Sample Certificates

The following are samples of the certificates that will be awarded to course participants:-

(2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.

Haward Technology Middle East

Continuing Professional Development (HTME-CPD)

CEU Official Transcript of Records

TOR Issuance Date:	16-Nov-21
HTME No.	8667-2014-9020-2559
Participant Name:	Waleed Al Habeeb

Program Ref.	Program Title	Program Date	No. of Contact Hours	CEU's
IE0198-4D	Professional Certificate in Electronic Document & Records Management (EDRM)	November 13-16, 2021	24	2.4

Total No. of CEU's Earned as of TOR Issuance Date   **2.4**

TRUE COPY

Jaryl Castillo
Academic Director

Haward Technology has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this approval, Haward Technology has demonstrated that it complies with the ANSI/IACET 1-2013 Standard which is widely recognized as the standard of good practice internationally. As a result of their Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for programs that qualify under the ANSI/IACET 1-2013 Standard.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking Continuing Education Units (CEUs) in accordance with the rules & regulations of the International Association for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology is accredited by

BAC | ilm Recognised Provider | nebosh LEARNING PARTNER BRONZE | AWS American Welding Society INTERNATIONAL AGENT | ACCREDITED IACET PROVIDER | UKAS MANAGEMENT SYSTEMS ISO 9001:2015 Certified | City& Guilds Approved Centre | API Proud Provider Upward Knowability

P.O. Box 26070, Abu Dhabi, United Arab Emirates | Tel.: +971 2 3091 714 | Fax: +971 2 3091 716 | E-mail: info@haward.org | Website: www.haward.org

Certificate Accreditations

Certificates are accreditation by the following international accreditation organizations:

- **The International Accreditors for Continuing Education and Training (IACET - USA)**

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

- **British Accreditation Council (BAC)**

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:

Dr. Mike Tay, PhD, MSc, BSc, is a **Senior IT**, **Telecommunications**, **Control & Electronics Engineer** with over **35 years** of extensive experience. His expertise widely covers in the areas of **Cloud Infrastructure**, **Digital Transformation**, **Cloud Security Mechanism**, **E-Communication & Collaboration** Skills, **Virtual Communication**, **Social Networking**, **Business Intelligence** Tools, **IT Disaster Recovery & Planning**, **IT Risk Management** Concepts, **IT Risk Management** Standard Approaches, I**T Risk Management** Planning, **IT Risk** Identification, **IT Risk Monitoring** & **Control**, **Information Technology** Architectures, **Application** Architecture, **Portfolio** Management, **Application Security**, **Application Integration** Technologies & Strategies, **Solution Architecture** Patterns, **Web Applications** & Services, **Mobile** & **Cloud Applications**, **Blended Learning** Programs, **Web Programming**, Advanced **Database Management** Systems, **Web Design**, **HCI**, 3D Animation, Multimedia Design, Gamification Techniques, Internal & External Auditing, **OS Architectures** and **Network Security**. Further, he is also well-versed in Mobile Protocols, 4G LTE, GSM/UMTS, CMDA2000, WIMAX Technology, HSPA+, Alarm Management System, Computer Architecture, Logic & Microprocessor Design, Embedded Systems Design plus Computer Networking with CISCO, Network Communication, Industrial Digital Communication, Designing Telecommunications Distribution System, Electrical Engineering, WiMAX Broadband Wireless System, TT Intranet & ADSL Network, TT Web & Voicemail, Off-site ATM Network, IT Maintenance, Say2000i, IP Phone, National Address & ID Automation, Electricity Distribution Network, Customs Network & Maintenance, LAN & WAN Network, UYAP Network, Network Routing Protocols, Multicast Protocols, Network Management Protocols, Mobile & Wireless Networks and Digital Signal Processing. Currently, he is the **Technical Advisor** of **Izmir Altek**.

During his career life, Dr. Tay worked with various companies such as the **KOC Sistem**, **Meteksan Sistem**, **Altek BT**, **Yasar University**, **Dokuz Eylul University**, **METU** and occupied significant positions like the **Aegean Region Manager**, **Group Leader**, **Technical Services Manager**, **Field Engineer**, **Research Assistant**, **Instructor**, **Technical Advisor** and the **Dr. Instructor**.

Dr. Tay has **PhD**, **Master** and **Bachelor** degrees in **Electrical & Electronic Engineering** from the **Dokuz Eylul University** and the **Middle East Technical University** (**METU**) respectively. Further, he is a **Certified Instructor/Trainer**, **Technical Trainer (Australia)**, **Trainer** for **Data-Communication System (England & Canada)**, a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management** (**ILM**), a **Certified CISCO** (**CCSP**, **CCDA**, **CCNP**, **CCNA**, **CCNP**) **Specialist**, a **Certified CISCO IP Telephony Design Specialist**, **CISCO Rich Media Communications Specialist**, **CISCO Security Solutions** & **Design Specialist** and **Information Systems Security** (**INFOSEC**) **Professional**. He has delivered and presented innumerable training courses and workshops worldwide.

Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

Day 1

0730 – 0800	*Registration & Coffee*
0800 – 0815	*Welcome & Introduction*
0815 – 0830	***PRE-TEST***
0830 – 0930	***Introduction to EDRM:*** *Understanding the Importance of Electronic Document & Records Management in Modern Organizations*
0930 – 0945	*Break*
0945 – 1030	***Differences Between Documents & Records****: Identifying the Distinctions and the Importance of Each in an Organizational Context*
1030 – 1130	***Legal & Compliance Requirements:*** *Overview of Legal, Regulatory & Compliance Issues Affecting Electronic Records Management*
1130 - 1230	***Principles of Effective EDRM:*** *Key Principles, Including Transparency, Integrity, Protection, Compliance & Accessibility*
1230 – 1245	*Break*
1245 – 1345	***EDRM Systems Overview:*** *Introduction to Electronic Document & Records Management Systems (EDRMS) & their Capabilities*
1345 - 1420	***Implementing an EDRM Strategy:*** *Steps for Developing & Implementing an Effective EDRM Strategy*
1420 – 1430	***Recap***
1430	*Lunch & End of Day One*

Day 2

0730 – 0830	***Document Lifecycle Management:*** *The Lifecycle of Documents from Creation to Disposal*
0830 – 0930	***Document Control & Version Management:*** *Techniques for Controlling & Managing Versions of Electronic Documents*
0930 – 0945	*Break*
0945 – 1100	***Collaboration & Sharing:*** *Best Practices for Sharing & Collaborating on Documents While Ensuring Security & Control*
1100 – 1230	***Metadata & Indexing:*** *Importance of Metadata & Indexing in the Organization, Search & Retrieval of Electronic Documents*
1230 – 1245	*Break*
1245 – 1345	***Electronic Document Formats:*** *Overview of Common Document Formats & Considerations for their Use in EDRM*
1345 - 1420	***Security Measures for Electronic Documents:*** *Ensuring the Confidentiality, Integrity & Availability of Electronic Documents*
1420 – 1430	***Recap***
1430	*Lunch & End of Day Two*

Day 3

0730 – 0830	***Records Inventory & Classification:*** *Conducting a Records Inventory & Developing a Classification Scheme*
0830 – 0930	***Retention & Disposal Schedules:*** *Creating & Implementing Retention & Disposal Schedules for Electronic Records*
0930 – 0945	*Break*
0945 – 1100	***Electronic Records Management Systems (ERMS)****: Features & Functionalities of ERMS*

1100 – 1230	**Digital Preservation:** *Strategies for the Long-Term Preservation of Electronic Records*
1230 – 1245	*Break*
1245 – 1345	**Auditing & Reporting:** *Techniques for Auditing Electronic Records & Generating Compliance & Management Reports*
1345 - 1420	**Case Study Workshop:** *Applying Records Management Principles in a Practical Scenario*
1420 – 1430	**Recap**
1430	*Lunch & End of Day Two*

Day 4

0730 – 0830	**Information Governance & EDRM:** *Integrating EDRM into Broader Information Governance Frameworks*
0830 – 0930	**Managing Emails as Records:** *Strategies & Challenges in Managing Emails as Official Records*
0930 – 0945	*Break*
0945 – 1100	**Cloud-Based EDRM Solutions:** *Exploring the Benefits & Challenges of Cloud-Based EDRM Solutions*
1100 – 1230	**Emerging Technologies in EDRM:** *The Impact of Technologies such as AI, Blockchain & Machine Learning on EDRM*
1230 – 1245	*Break*
1245 – 1345	**Risk Management in EDRM:** *Identifying & Mitigating Risks Associated with Electronic Document & Records Management*
1345 - 1420	**Interactive Session:** *Group Discussion on Emerging Trends & Technologies in EDRM*
1420 – 1430	**Recap**
1430	*Lunch & End of Day Two*

Day 5

0730 – 0830	**Developing an EDRM Policy:** *Key Components of an Effective EDRM Policy*
0830 – 0930	**Change Management & Training:** *Strategies for Managing Organizational Change & Training Users on EDRM Systems*
0930 – 0945	*Break*
0945 – 1100	**Case Studies in EDRM Implementation:** *Reviewing Successful EDRM Implementation Projects & Lessons Learned*
1100 – 1230	**Best Practices in EDRM:** *Consolidating Key Best Practices & Guidelines for Effective Management of Electronic Documents & Records*
1230 – 1245	*Break*
1245 - 1300	**Developing an Action Plan:** *Participants Develop an Action Plan for Implementing or Improving EDRM in their Organization*
1300 - 1315	**Course Conclusion**
1315 - 1415	**COMPETENCY EXAM**
1415 – 1430	*Presentation of Course Certificates*
1430	*Lunch & End of Course*

Simulator (Hands-on Practical Sessions)

Practical session will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using the simulator "Ms Project" and "Primavera".

Primavera Software
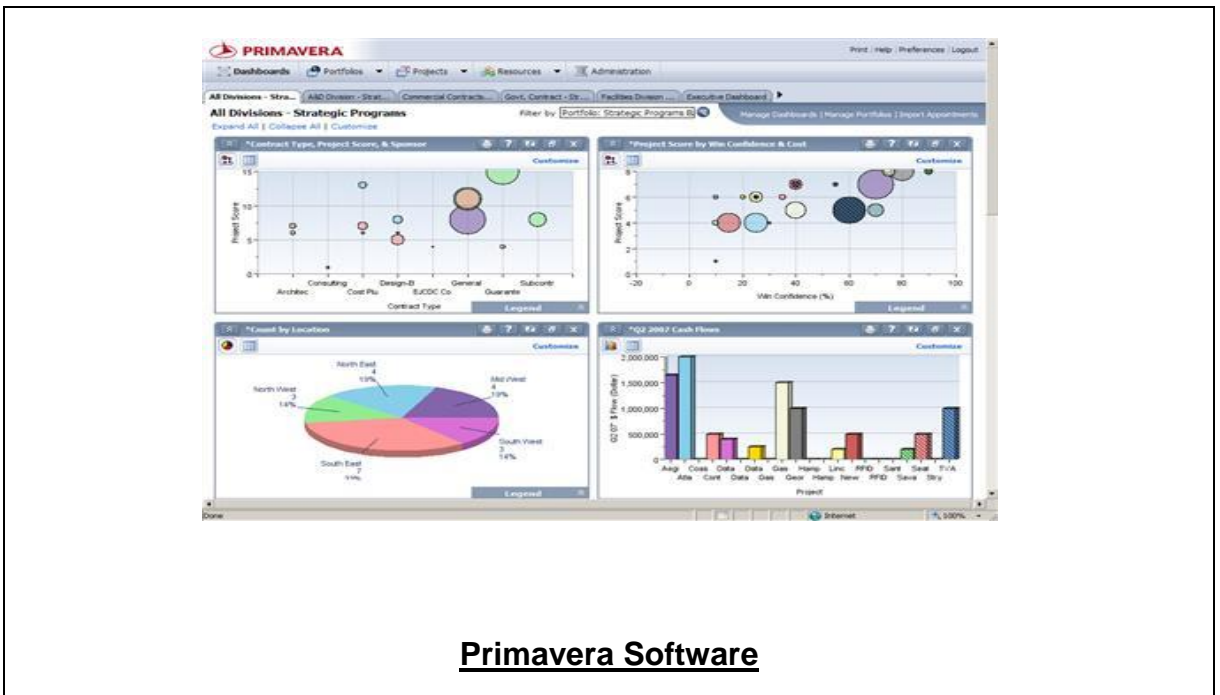
Course Coordinator

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