

Successfully Managing an Electronic Document and Records Management Project

One-day course

- 2012 dates to be confirmed
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- at the Innovation Centre, University of Hertfordshire

£25
Early Booking
Discount

Choice
of two
dates



- Successful project planning
- Information gathering
- Making the business case for EDRM
- Implementing EDRM in your organisation



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Overview

This course is aimed at those tasked with planning for and managing the implementation of Electronic Document and Records Management (EDRM), or Enterprise Content Management (ECM) into their organisation.

This course looks at what is involved in planning and managing an EDRM or ECM project and provides practical guidance on techniques for information gathering and analysis, on how to conduct a feasibility study and make the business case, and on how to define your requirements for EDRM/ECM and develop the information and records management policies, procedures and tools for your organisation.

Programme

The morning session starts with a review of the stages you need to go through to successfully implement an EDRM solution and how to set up and manage an EDRM project.

The course then reviews the information gathering and analysis tasks. Guidance is provided on how to review your business activities and



current information and records management policies, procedures and systems, and how to develop a classification scheme.

The afternoon starts with a session on how to analyse your findings and conduct a feasibility study, select the preferred option and make the business case for that option.

The next session looks in more detail at how you define your functional and service requirements for EDRM and plan and procure the software and services you need.

The final session looks at how you prepare for and implement your EDRM solution, agreeing the information architecture, setting up a proof of concept, roll out and benefits measurement.

The sessions are designed to be interactive with time set aside for discussion.

Cimtech

Cimtech is a centre of expertise on all aspects of enterprise content management (document management; records management; business process management and Web Content Management) based at the University of Hertfordshire. Cimtech provides independent consultancy services, courses and publications in this field.



Programme

(Cimtech reserves the right to alter the timing and content of the sessions.)

09.00 *Registration and coffee*

09.30 **Introduction to the course**

09.45 **Setting up an EDRM project**

Project governance, change management, resource management and planning the stages.

10.45 *Coffee break*

11.00 **Information gathering and preparation**

Review and analysis of business activity. Review of information and records management policy, procedures and systems. Information audit and development of business classification scheme.

Discussion

12.30 *Lunch break*

13.15 **Feasibility study and business case**

Reviewing the strategy options. Reviewing the EDRM solution options. Assessing the tactical and strategic benefits. Estimating costs and savings.

14.15 **Defining your requirements and procuring the solution/services**

Defining a statement of requirements (SOR). Procurement routes and timescales.

15.15 *Tea break*

15.30 **Implementation**

Preparing for EDRM—information architecture. Proof of concept/pilots. Rollout methods. Benefits measurement.

Discussion

16.45 *Close*

● All course sessions will be delivered by Cimtech senior consultants including Tony Hendley, John Walsh and Alison Gibney.

Booking

Please complete the booking form overleaf and return to Cimtech as soon as possible. If you book a place and your plans change, an alternative delegate is welcome. If that is not possible, you may cancel your booking with a refund—less 10 per cent administrative charge—provided we receive notification in writing at least 10 working days before the event. Cancellations received after that will be liable for the full amount. Special diets can be accommodated and a list of local hotels

will be sent on request—please tick the appropriate boxes on the booking form.

● Online booking

If you would like to make an online reservation for one or more places on this course, or any other Cimtech course, you can do so via our website at www.cimtech.co.uk. The online booking form can be found by following the links 'EVENTS—ONLINE BOOKING'.

