

To: HOD, Documentation and Records Management

From: Informant Consultancy

Date:

RE: Proposal for In-House Training on the implementation of electronic document management systems (EDMS)

Introduction

We write to seek approval to train and find out if knowledge and skills in records management and subsequent set up and implementation of electronic document management systems in the Lands and Housing Ministry will bring about orderliness in the institution.

This proposal aims at investigating issues, identifying viable and cost effective solutions, and recommending the best solutions regarding EDMS.

Allowing the project to proceed as intended will help in building a bridge between the importance of safeguarding the records and information as well as maximization of document storage space.

I look forward for your considerate permission,

Yours Sincerely,

(Name):

(Title):

Background on Problem

As of now, the Ministry of Lands and Housing is experiencing disorganization in its departments as a result of huge piles of documents that are stored in hand files since there are no adequate storage capacity. The Ministry has recorded numerous cases of document forgery where various employees engage in the vice so as they get the 'extra' money as evident in the finance department. Additionally, the records and document department is greatly affected by the lack of effective systems as many employees collude with land fraudsters in giving out fake land title deeds.

The fact that the Ministry engages or deals with voluminous documents files in hand form out of the lack for technologized storage capacity, there is disorganization and untidiness. That can be avoided upon the implementation of electronic document management systems in the Ministry.

Statement of the Problem

The Ministry for Lands and Housing handles voluminous pieces of information concerning land owners and house owners both residential and business. The records range from ministry finance, all transactions, title deeds, plot numbers and the total number of land available for occupation and already occupied. All these sets of information mainly in form of paper is in

the hands of a few individuals employed to works in the records and, management department. The documents are crucial in relation to the student proof of understanding and qualification in the field of specialization. Implementing the in-house training on electronic document management systems would be a step to ensuring more security of the documents.

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Overall, the Ministry faces challenges regarding records and document storage as there is inadequate storage space, the system of storage is not technology sensitive meaning that information archiving is difficult in the Ministry. However, the problem is more as a result of the fact that the staff is untrained technologically and as such, lacks modern skills ways of records and document management. The in house training is important as it is necessary in equipping the concerned persons with knowledge on electronic document management systems.

Proposed Solution

There is the need for the Ministry staff members from various departments to undergo training electronic document management systems. The training will attract chargeable fee of \$600 per head per day exclusive of VAT and the training will be for 3 days consecutively. There will be additional charge of \$100 for breakfast and lunch.

OPTION	DESCRIPTION	UNIT COST PER PARTICIPANT (\$) FOR THREE DAYS	TOTAL COST FOR 3 DAYS PAX(\$)
A	Training conducted at THE Ministry of Lands and Housing-the university meets the cost of venue and professional fee	\$ 1,800	\$ 5400
B	Training conducted at venue secured by Informant- consultant meets cost of venue	\$ 2000	\$ 6000

Scope

How knowledge and skills in records management and the setting up and implementation of electronic document management systems in the institution would contribute to orderly archiving and safety of documents.

Methods

For the reason of discovering the requirement and significance of skills and information in electronic file organization systems to the foundation, there will be an in-house preparation for 30 staff members from various departments in the university on the accomplishment of electronic document administration systems in the University.

The teaching will have five deliverables including training day, the topic, learning objectives, training methodology, and training tools as follows in the table below;

Training Deliverables/Schedule

DAY	TOPIC	LEARNING OBJECTIVES	TRAINING METHODOLOGY	TOOLS
1	<ul style="list-style-type: none"> • EDMS- definition and importance • Concept of paperless office • Functional requirement of EDMS 	<ul style="list-style-type: none"> • Identify EDMS roles and particulars • Contextualization of electronic records using EDMS • Forms of document capture 	Focus Group Discussions, Case Studies, Demos, Practical	Globodox EDMS
2	<ul style="list-style-type: none"> • Archiving and retrieval • Data saving forms in an EDMS • Document security 	<ul style="list-style-type: none"> • Organization of document files and folders • Document security enforcement in EDMS 	Oral presentations, FGDs, Practical, Hands-on EDMS	Globodox EDMS
3	<ul style="list-style-type: none"> • Document Distribution • Processes- share, restrict, route etc • Workflow creation • Tracking 	<ul style="list-style-type: none"> • Document distribution, share, assign in EDMS • Design of workflows 	FGDs, Presentations, Hands-on EDMS	Case studies, Activity boards, Globodox EDMS

Qualification

The project will be effectively executed as the lead Consultant is a specialist in the field as he has been involved in teaching and training of information science topics and programs.

Limitations

The university's computer systems have lower amounts of storage capacity and as such, it will be challenging to fully install the system that is of high capacity as it cannot fit in the machines. Other limitations are in terms of high cost of training material, too many people yet few days for training, short deadline for confirmation of attendance, computer literate individuals are the target, and high cost of accompanying software

Conclusion

It is with no doubt that knowledge and skills in EDM is critical in bringing about orderly archiving and document safety. While the project is expensive, the successful implementation of the proposal will lead to easy management safety of the documents, records and their storage in all the in the university departments. However, it is recommendable that all the training variables topics be covered as they are crucial in bringing about an understanding of EDMS.

In addition, for the purpose of saving on the cost of the project, the Ministry of Lands and Housing should consider settling proposed solution option A or 1 that concern the training of the staff members taking place at the venue secured the Ministry meaning that the Ministry itself will cater for the training costs. That is because the total cost is cheaper in comparison with solution option B, by the training taking place in the Ministry's compound there will be no extra costs on the trainees such as transport, and the Ministry's records and data management challenges will serve as real or practical examples in demonstrating the theoretical approach to the trainees as that is what standards provide for.

Therefore, despite the limitations of the project, the Ministry stands to significantly benefit the project as a whole but more so if the training is undertaken under option A of the training due to convenience of time, venue, and lively examples for the trainees.

Referee

Name:

Company/Institution

Department: