

Advanced Course on Document Management and Electronic Archiving

15 – 19 March 2027
Lisbon (Portugal)

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Introduction

Welcome to the Document Management System DMS Training Course! This comprehensive training program is designed to provide participants with an in-depth understanding of how to manage documents electronically using advanced document management systems. In today's digital age, electronic document management has become essential to improving workflow efficiency and reducing the costs associated with physical paper. This course will equip you with the skills to automate document management tasks, streamline information flow, and leverage electronic archiving for long-term document storage and retrieval.

Course Objectives

By the end of this course, participants will:

- Manage documents effectively using electronic document management systems EDMS to eliminate paper usage and reduce distribution costs.
- Digitize paper documents, including scanning, Optical Character Recognition OCR, and archiving, to create searchable, accessible digital files.
- Learn how to automate office functions, integrate workflows, and ensure compliance with ISO 9000 and other regulatory requirements.
- Gain knowledge on various technologies involved in document management and electronic archiving, and how to apply them to improve operational efficiency.
- Evaluate the advantages and benefits of electronic archiving, including how it enhances accessibility and long-term storage of digital documents.
- Understand how to create a document management plan and document management policies for your organization.

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A graphic illustration of a chessboard with several chess pieces. A large gold king piece is prominent in the foreground, with a silver pawn and a silver knight behind it. The board is checkered, and there are concentric circles in the background.

Course Outlines

Day 1: Understanding the Fundamentals

- What is document management?: Introduction to document management and its importance in the digital era.
- The shift from paper-based to electronic document management systems.
- Electronic archiving meaning: Understanding the concept of electronic archiving and its role in reducing storage costs.
- Regulatory frameworks: Familiarize with ISO 9000 and other compliance requirements related to document management.

Day 2: Exploring Functional Differences and Technologies

- Document management process: Understanding the core functions of document management systems DMS.
- Exploring various technologies used in document management and electronic archiving.
- The role of Optical Character Recognition OCR and indexing for document management.
- Card/Folio-based systems and scanning functionalities.
- Key differences between Document Management Systems DMS and Records Management Systems RMS.

Day 3: System Implementation and Resource Allocation

- Best document manager: How to select the right document management system for your organization.
- Planning and implementing electronic document management systems EDMS and EDRMS.
- Identifying key stakeholders and allocating resources for successful DMS implementation.
- Understanding data migration and ensuring digital continuity in document management.

Day 4: Innovative Approaches to Document Management

- Documents on Demand: Introducing new models for managing documents when needed.
- Multimedia documents: Managing documents that contain multimedia elements.
- Integrating document management with workflow management for increased efficiency.
- Understanding the relationship between business process management and document management.

Day 5: Ensuring Document Security and Retrieval

- Document security: Best practices for protecting documents with encryption, authentication, and digital signatures.
- Digital rights management: Securing electronic documents with advanced document management systems.
- Document retrieval techniques: Strategies for quickly accessing and retrieving documents when needed.
- Managing complex or compound documents with advanced document management features.

Why Attend This Course: Wins & Losses!

- Gain valuable skills: Master the document management process and understand the critical role electronic archiving plays in the modern digital workplace.
- Boost efficiency: Learn how to implement advanced document management solutions to automate tasks and optimize your organization's workflow.
- Reduce costs: Eliminate the inefficiencies and expenses associated with paper-based document management, while improving document retrieval and storage.
- Enhance security: Understand the document security measures needed to protect sensitive documents in a digital environment.
- Stay ahead of the curve: As document management technologies evolve, staying up to date with the latest tools and techniques will give you a competitive advantage in your industry.

Conclusion

By the end of this course, you will have gained a thorough understanding of the document management process and learned how to implement electronic archiving strategies to optimize document storage and retrieval. You'll also be equipped with the knowledge to create effective document management policies and plans that comply with international standards, such as ISO 9000.

The hands-on experience and insights gained from this course will help you improve operational efficiency, reduce costs, and increase overall document management effectiveness in your organization.

A graphic of a chessboard with several pawns. In the foreground, a large gold king piece stands prominently. Behind it, a silver pawn and a gold pawn are visible. The board is a checkered pattern of light and dark squares. In the background, there are concentric circles radiating from a point, suggesting a signal or a focus.

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