

Workshop on Document Management and Electronic Archiving

5 – 9 July 2027
Toronto (Canada)

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Ref: 321522_154309 **Date:** 5 - 9 July 2027 **Location:** Toronto (Canada) **Fees:** 6600 GBP

Introduction

In today's fast-paced business world, managing documents efficiently is essential for maintaining productivity and reducing costs. A Document Management System DMS is a computer-based tool used to track, store, and manage electronic documents. It can keep track of various versions modified by different users. The term overlaps with Content Management Systems CMS and is often viewed as part of Enterprise Content Management ECM systems. These systems are crucial for digital asset management, document imaging, workflow systems, and records management. This course demonstrates how to manage documents electronically, reducing the reliance on paper documents that consume valuable space and time.

Course Objectives

By the end of this course, participants will be able to:

- Manage and control documents including folders and forms, reducing document distribution costs by eliminating paper.
- Scan, index, and archive paper documents, transitioning to electronic document management.
- Automate office functions that involve workflows and electronic mail, making document handling more efficient.
- Understand and apply ISO 9000 and other regulatory requirements in document management.
- Explore the various technologies involved in Electronic Document Management Systems EDMS.
- Manage EDMS projects and justify the Return on Investment ROI.
- Gain hands-on experience with EDMS products.
- Evaluate merging standards in document management.

Course Outlines

Day 1: Understanding the Challenges of Digital Information Management and Risks

- The changing information landscape.
- The digital challenge in document management.
- The need for EDMS and Electronic Document and Records Management Systems EDRMS.
- Differences between document and records management.
- ISO 9000 and other regulatory requirements.
- Understanding information risks and how to mitigate them.

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Day 2: Exploring EDMS and EDRMS: Technology Options, Implementation, and Change Management

- Functional differences between EDMS and EDRMS.
- Technology options available for document management.
- Authoring systems, card/folio-based systems, and scanning functionalities.
- Types of document and records management systems.
- Which system suits your organization?
- Implementing EDMS/EDRMS and managing change effectively during implementation.

Day 3: Selecting and Successfully Implementing Document Management Systems

- Off-the-shelf vs. customized systems.
- Allocating resources: who should be involved in a successful rollout?
- Reviewing a live EDRMS system.
- Data updates and migration between systems.
- Data handling and digital continuity within the context of EDMS/EDRMS.

Day 4: Advanced Models for Document Management and Integrating Artificial Intelligence in Business Processes

- Documents on demand: A new model for document management.
- Managing multimedia documents.
- Extracting information from documents using computer vision techniques.
- Workflow and document management.
- Business process management: an overview.
- Integrating Intelligent Business Process Management with document handling.

Day 5: Document Security, Management, and Retrieval

- Document security: authentication, authorization, and audit.
- Digital rights management for document security.
- Managing compound documents.
- Implementing digital signatures.
- Efficient document retrieval techniques.

Why Attend this Course: Wins & Losses!

- Learn how to improve document management electronically, leading to significant savings in space and time.
- Gain insight into how to effectively archive documents electronically using modern EDMS technologies.
- Understand the document management lifecycle and how to manage it more efficiently using EDMS/EDRMS.
- Eliminate paper-based workflows, reducing distribution costs and enhancing overall efficiency.
- Gain a solid understanding of how to meet ISO 9000 requirements and other regulatory standards.
- Learn how to implement an EDMS system and evaluate the return on investment for digital document management solutions.
- Hands-on practice with industry-leading EDMS products.

Conclusion

By the end of this course, participants will be equipped with the skills and knowledge necessary to successfully implement and manage a Document Management System DMS within their organization. You will understand how to leverage electronic document management to enhance operational efficiency, reduce costs, and comply with regulations. You'll also be able to evaluate and select the best EDMS products and create a streamlined document workflow that supports your organization's goals.

This training will prepare you to navigate the complexities of the document management lifecycle, integrate advanced technologies such as artificial intelligence in document handling, and ensure your organization's documents are secure, accessible, and efficiently managed.

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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 black pawn nearby. The board is checkered, and there are concentric circles in the background.