

Document Management and Electronic Archiving

21 – 25 December 2026
Boston, Massachusetts (USA)

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Introduction

In today's increasingly digital world, document management is essential for organizations aiming to streamline operations, enhance efficiency, and reduce reliance on paper-based processes. A document management system DMS is a sophisticated platform designed to track, store, and manage electronic documents, allowing for seamless version control across multiple users. But what is document management beyond its technical definition? It's a cornerstone of modern business operations, overlapping with content management and forming a crucial component of enterprise content management systems.

This course delves deep into document management and archiving, providing participants with the tools needed to transition from traditional paper methods to efficient electronic alternatives. By mastering business document management strategies, organizations can overcome the space and time limitations of physical documents, leading to improved productivity and compliance.

Course Objectives

- Gain a comprehensive understanding of document management meaning and its role in modern organizations.
- Learn how to control and manage documents, folders, and forms to reduce distribution costs and eliminate paper reliance.
- Discover the benefits of electronic archiving of documents and how it enhances overall business document management.
- Master key processes such as scanning, optical character recognition OCR, indexing, and digital document storage.
- Automate office functions involving workflows and electronic mail to boost efficiency.
- Address ISO 9000 requirements and other regulatory needs for compliance in document control systems.
- Understand various types of document management systems and their applications.
- Develop a strong document management strategy that demonstrates ROI for organizational projects.
- Gain hands-on experience with leading document management programs.
- Evaluate emerging standards and identify the best document control systems 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 other pieces like a silver pawn and a gold pawn visible. The board is checkered, and there are concentric circles in the background.

Course Outlines

Day 1: The Changing Information Landscape

- Explore the evolution of document management and its significance in today's digital business environment.
- Discuss challenges and opportunities in adopting document management and electronic archiving solutions.
- Understand the differences between document management and records management.
- Review ISO 9000 and regulatory requirements for document control systems.
- Identify risks related to poor document management practices.

Day 2: Understanding EDMS and EDRMS

- Examine the differences between Electronic Document Management Systems EDMS and Electronic Records Management Systems EDRMS.
- Explore various technologies and the types of document management systems available.
- Analyze authoring systems, card/folio-based systems, and scanning technologies.
- Learn the implementation process of EDMS/EDRMS and the role of change management.

Day 3: Implementation Strategies

- Compare off-the-shelf vs. custom document management programs to find the right fit.
- Allocate resources and identify key stakeholders in a successful DMS rollout.
- Review live EDRMS systems to understand their features and benefits.
- Discuss data migration, updating processes, and ensuring digital document storage continuity.

Day 4: Innovative Document Management Models

- Learn about "Documents on Demand" and other new models for efficient document management.
- Integrate multimedia documents into your corporate document management system.
- Explore how computer vision can extract information from documents.
- Understand the interplay between workflows and document management to streamline processes.
- Gain insights into business process management and intelligent automation.

Day 5: Ensuring Document Security

- Dive into best practices for securing document control systems: authentication, authorization, and auditing.
- Explore digital rights management and its impact on document compliance.
- Learn how to manage compound documents and ensure data integrity.
- Understand the importance of digital signatures in secure transactions.
- Master document retrieval techniques to improve efficiency.

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Why Attend This Course: Wins & Losses!

- Master the document management advantages that drive organizational success.
- Learn how to implement electronic archiving for better compliance and efficiency.
- Gain practical knowledge of the best cloud document management solutions.
- Develop a tailored document management strategy aligned with your organizational goals.
- Explore cutting-edge document management programs and technologies.
- Ensure compliance with ISO and other regulations through effective document control systems.

Conclusion

This comprehensive course on document management and archiving equips participants with the knowledge and skills needed to implement robust document management systems. By understanding document management benefits and leveraging electronic archiving strategies, attendees will be empowered to drive efficiency, enhance compliance, and streamline workflows in their organizations. Whether you're exploring the best cloud document management options or developing a corporate document management system, this course will provide the expertise to excel in the digital age.

Join us to master document management and unlock new possibilities for organizational growth and success.

A graphic of a chessboard with several chess pieces. A 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.

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