

Document Management and Electronic Archiving

Rome (Italy)

15 - 19 September 2025

UK Training

PARTNER



Document Management and Electronic Archiving

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Introduction

In an increasingly digital world, effective document management is vital for organizations seeking to streamline operations and improve efficiency. A document management system DMS is a sophisticated computer system used to track and store electronic documents, allowing organizations to manage various versions modified by different users seamlessly. The concept of document management overlaps with content management systems and is a crucial component of enterprise content management systems. This course will delve into the significance of document management and archiving, equipping participants with the tools needed to transition from traditional paper-based methods to more efficient electronic alternatives. By doing so, organizations can eliminate the space and time constraints associated with hard copies.

Course Objectives

- Gain a comprehensive understanding of document management meaning and its role in modern organizations.
- Learn how to control and manage documents, including folders and forms, to reduce distribution costs and no more reliance on paper.
- Discover the advantages of electronic archiving and how it enhances business document management.
- Master scanning, optical character recognition OCR, indexing, and archiving of physical documents.
- Automate office functions involving workflows and electronic mail to improve efficiency.
- Address the requirements of ISO 9000 and other regulatory agencies, ensuring compliance within your organization.
- Understand the different technologies involved in various types of document management systems.
- Develop a robust document management strategy that justifies return on investment ROI for your projects.
- Receive hands-on training with leading document management programs.
- Evaluate emerging standards in document control systems.

Course Outlines

Day 1: The Changing Information Landscape

- Explore the evolution of document management and its significance in today's business environment.
- Discuss the digital challenges organizations face and the necessity of adopting document management and electronic archiving solutions.
- Understand the differences between document management and records management.
- Review ISO 9000 and other regulatory requirements related to document control.
- Identify information risks associated with inadequate document management practices.

Day 2: Understanding EDMS and EDRMS

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- Examine the functional differences between Electronic Document Management Systems EDMS and Electronic Records Management Systems EDRMS.
- Explore various technology options available for document management.
- Analyze authoring systems and the functionalities of card/folio-based systems, including scanning capabilities.
- Identify different types of document management systems to determine the best fit for your organization.
- Learn about implementing EDMS/EDRMS and the role of change management in ensuring successful adoption.

Day 3: Implementation Strategies

- Compare off-the-shelf versus custom systems to find the right solution for your organization's needs.
- Allocate resources effectively: identify key stakeholders involved in a successful rollout of your document management system.
- Review a live EDRMS system to understand its features and benefits.
- Discuss updating processes and data migration between systems to ensure smooth transitions.
- Explore data handling and digital continuity within the context of document management.

Day 4: Innovative Document Management Models

- Learn about "Documents on Demand," a new model for efficient document management.
- Explore the integration of multimedia documents into your document management framework.
- Understand how to extract information from documents using a computer vision approach.
- Discuss the interplay between workflow and document management to streamline business processes.
- Gain an overview of business process management and intelligent business process management for improved document interaction.

Day 5: Ensuring Document Security

- Delve into document security best practices, focusing on authentication, authorization, and auditing processes.
- Understand document security from a digital rights management perspective and its impact on compliance.
- Learn how to manage compound documents effectively, ensuring their integrity and accessibility.
- Explore the importance of digital signatures in securing document transactions.
- Master effective document retrieval techniques to enhance workflow efficiency.

Conclusion

This comprehensive course on document management and electronic archiving will empower participants to implement effective systems that optimize storage, enhance compliance, and improve workflows. By mastering the advantages and strategies of business document management, attendees will be equipped to drive organizational success in the digital age. Whether you're exploring the best cloud document management solutions or developing a corporate document management system, this course provides the knowledge and skills necessary to thrive in a document-centric environment.

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