



## Advanced EDMS (Electronic Document Management Systems)

03 - 07 Jun 2024  
Madrid (Spain)



# Advanced EDMS (Electronic Document Management Systems)

**Ref.:** 15059\_274098 **Date:** 03 - 07 Jun 2024 **Location:** Madrid (Spain) **Fees:** 4900 **Euro**

## Introduction:

A document management system is a computer system used to track and store electronic documents. It is usually also capable of keeping track of the different versions modified by different users. The term has some overlap with the concepts of content management systems. It is often viewed as a component of enterprise content management systems and related to digital asset management, document imaging, workflow systems and records management systems. This course shows you how to deal with papers in an electronic way to get rid of the papers hard copy which takes a lot of space and time

## Targeted Groups:

- Compliance Officers/Managers
- Information Security Managers
- Records Managers
- Information Managers
- Operations Managers
- Knowledge Managers
- Administrators
- Librarians, Secretaries

## Course Objective:

At the end of this course the participants will be able to:

- Manage/ control documents, including folders and forms, reduce document distribution costs - no more paper.
- Distribute and view documents costs - no more paper
- Scan, OC, index, and archive paper documents.
- Automate other office functions that involve workflows and electronic mail
- Address requirements of ISO 9000 and other regulatory agencies.
- Understand different technologies involved in EDMS
- Get hands-on training on some EDMS products
- Evaluate merging standards

## Targeted Competencies:

- Document control
- OCR Optical Characters Recognition
- Data management
- Data control
- Data security

## **Course Content:**

### **Unit 1: Introduction:**

- EDMS - what is it and Benefits
- The paper flood
- The paperless office
- Document capture
- Scanning of documents
- OCR and image processing
- Indexing, archiving and retrieval
- Demonstration
- Word processors/spreadsheets
- Forms
- Document Management

### **Unit 2: Document Control:**

- Revisions/versions/histories
- Audit trails
- Reports
- Demonstration
- Forms Management
- Creating forms
- Filling and saving forms/data
- Document Distribution: Workflow Management
- Applications
- Creations
- Tracking/closure
- Demonstration
- Filling and saving forms/data

### **Unit 3: Document Distribution: Workflow Management:**

- Applications
- Creations
- Tracking/closure
- Document Distribution: Electronic Mail: Concepts and Demonstration
- Document Browsing
- Navigation
- Application/independent viewers
- Annotation/sticky/notes/red/lining
- ISO 9000 & others Regulatory Requirements
- System Architectures & Platforms: LAN`s & WANs and Client-Server Architectures

## **Unit 4: Technology Options:**

- Encryption
- Authoring Systems
- Card/folio based systems
- Types of Documentation Systems
- Implementing EDMS
- Off - the- shelf VS Customs systems
- Allocating resources
- EDMS management
- Updating system
- Future topics
- Documents on demand
- Multimedia documents
- Process Context Diagram- Document Management
- Process flow- Document management
- Role and responsibilities- Document management
- Potential process measurements KPIs
- RACI MATRIX

## **Unit 5: Creating Backups and Restoring:**

- Top Document Management Software Products
- Best- practice in document management procedures, based on ISO standards Document Creation Templates
- Multiple Security Levels: a case of TREENO ADVANCED SECURITY AND AUDIT



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