

€ TRAINING

EDMS with Business Process Automation



7 - 11 April 2025
Rome (Italy)



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REF: K808 DATE: 7 - 11 April 2025 Venue: Rome (Italy) - Fee: 5940 Euro

Introduction:

This training program is designed to empower participants with the skills, knowledge, and techniques needed to effectively utilize Electronic Document Management Systems EDMS alongside Business Process Automation BPA technologies. Through mastering these tools and strategies, participants will streamline document workflows, automate routine tasks, and drive organizational efficiency and success.

Program Objectives:

At the end of this program, participants will be able to:

- Explore how EDMS and BPA support and optimize business processes.
- Improve customer satisfaction through streamlined document and workflow management.
- Enhance knowledge management and organizational control through automation.
- Empower employees by simplifying routine tasks and fostering innovation.
- Develop and implement requests for proposals RFPs and bidding documents with greater efficiency.

Targeted Audience:

- Professionals aiming to enhance their archiving and indexing capabilities.
- Document and records supervisors and controllers.
- Individuals seeking excellence and creativity in managing organizational processes.
- Team leaders and managers interested in integrating automation within their departments.
- IT and process improvement specialists working on digital transformation initiatives.

Program Outlines:

Unit 1:

Introduction to EDMS and Business Process Automation:

- Fundamentals of EDMS and BPA and their organizational significance.
- Synergies between EDMS and BPA in workflow optimization.

- Benefits of integrating EDMS with BPA for enhanced productivity.
- Overview of automation tools and technologies.
- Insights from case studies on successful EDMS-BPA implementations.

Unit 2:

Planning and Implementation Strategies:

- Strategic planning for EDMS-BPA integration in organizations.
- Engaging stakeholders and defining their roles in the implementation process.
- Conducting assessments to identify automation opportunities.
- Creating actionable deployment plans with defined timelines and milestones.
- Addressing risks and challenges associated with implementation.

Unit 3:

Integration of EDMS with BPA Platforms:

- Capabilities and configuration of EDMS and BPA platforms for integration.
- Automating document-centric workflows, including approvals and routing.
- Using APIs and connectors to integrate EDMS with other applications.
- Customizing rules and triggers to meet specific organizational needs.
- Testing and ensuring the reliability of EDMS-BPA integrations.

Unit 4:

Advanced Automation Techniques:

- Exploring advanced EDMS and BPA functionalities.
- Designing complex workflows using conditional logic and decision trees.
- Leveraging AI and ML for data extraction and classification.
- Implementing RPA to handle repetitive tasks and improve efficiency.
- Monitoring workflows for continuous improvement and refinement.

Unit 5:

Maximizing Value and ROI:

- Measuring the impact of EDMS-BPA integration on organizational performance.
- Evaluating KPIs to gauge automation effectiveness.
- Identifying opportunities to expand automation capabilities.
- Developing strategies to maximize ROI and value from EDMS and BPA.
- Establishing processes for ongoing monitoring and enhancement of automated workflows.