

€ TRAINING

Electronic Document Management System
EDMS



14 - 18 April 2025
Dusseldorf (Germany)



Electronic Document Management System EDMS

REF: K822 DATE: 14 - 18 April 2025 Venue: Dusseldorf (Germany) - Fee: 5940 Euro

Introduction:

This training program is designed to empower participants with the expertise to effectively utilize digital platforms for document storage, organization, and retrieval. By mastering the fundamentals of Electronic Document Management Systems EDMS, participants will streamline document processes, enhance collaboration, and optimize information management practices, aligning organizational workflows with modern digital standards.

Program Objectives:

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

- Identify how EDMS supports business processes and improves operational efficiency.
- Enhance customer satisfaction through optimized document access and management.
- Develop strategies for effective knowledge management using EDMS.
- Increase management control by leveraging EDMS functionalities for better oversight.
- Gain the tools and skills for efficient document handling and collaboration.

Targeted Audience:

- Professionals seeking to enhance their archiving and indexing expertise.
- Document and records supervisors aiming to modernize document management practices.
- Controllers and administrators responsible for ensuring compliance and data security.
- Personnel striving for excellence and innovation in document-centric roles.

Program Outlines:

Unit 1:

Introduction to Electronic Document Management System EDMS:

- Understanding EDMS fundamentals and its organizational importance.
- Benefits of transitioning from paper-based systems to EDMS.
- Key features and functionalities of EDMS platforms.

- Techniques for categorizing, indexing, and retrieving documents.

Unit 2:

Implementation and Integration of EDMS:

- Strategic planning for EDMS implementation in organizations.
- Integrating EDMS with existing software and workflows.
- Configuring user permissions and access controls for data security.
- The role and need of training employees on EDMS usage and navigation.
- Testing and troubleshooting during the implementation phase.

Unit 3:

Document Capture and Conversion:

- Techniques for capturing and digitizing paper documents into EDMS.
- Utilizing scanning hardware and OCR software for document conversion.
- Best practices for metadata extraction and automation of capture workflows.
- Ensuring document accuracy and quality during digitization.
- Strategies for batch processing and efficient document capture.

Unit 4:

Document Organization and Management:

- Creating hierarchical folder structures for EDMS organization.
- Implementing metadata tagging and classification for easy retrieval.
- Version control and tracking document revisions to maintain integrity.
- Using collaboration tools for co-authoring and reviewing documents.
- Setting retention policies and archival procedures for lifecycle management.

Unit 5:

Advanced Features and Customization Options:



- Exploring advanced search functionalities and filtering tools.
- Customizing user interfaces and dashboards to organizational needs.
- Integrating workflow automation tools to streamline document processes.
- Implementing templates and standardized workflows for consistency.
- Leveraging reporting and analytics to monitor and optimize document performance.