PARTNERS IN KNOWLEDGE UK LTD
Suite No. 129
295 Chiswick High Road
LONDON W4 4HH



EDMS (Electronic Document Management System)

PIK717-0627 UK-LDN-1

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Place	: London	**Venue**	: INDUSTRIOUS (1 and 2, 245 Hammersmith Road Floors, London W6 8PW) - TBC		
Start Date	: 21-06-2027	**End Date**	: 25-06-2027	**PPP**	: £4950

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If you can't train them, you can't blame them!

Short Description:

COURSE OVERVIEW This training program aims to equip participants with the skills necessary to effectively use digital platforms for the storage, organisation, and retrieval of documents. By mastering the fundamentals of Electronic Document Management Systems (EDMS), participants will learn to streamline document processes, thereby improving efficiency in their workflows. The program emphasises the significance of digital document management in today's fast-paced environment, enabling individuals to manage information in a structured manner that enhances accessibility. Moreover, the training fosters collaboration among team members by promoting best practices in information management. As participants delve into the intricacies of EDMS, they will discover how to optimise organisational workflows, ensuring that all team members can access the information they need promptly. This alignment with modern digital standards not only supports enhanced productivity but also encourages a culture of collaboration and innovation within organisations as they adapt to evolving technological landscapes.

Course Overview:

COURSE OBJECTIVES

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

- Identify how EDMS supports business processes.
- Understand the ways EDMS improves operational efficiency.
- Enhance customer satisfaction through optimized document access.
- Manage documents effectively using EDMS.
- Develop strategies for effective knowledge management.
- Leverage EDMS functionalities for better management control.
- Acquire tools and skills for efficient document handling and collaboration.

TARGET AUDIENCE

- Professionals seeking to enhance their archiving expertise.
- Professionals looking to improve their indexing skills.
- Document and records supervisors aiming to modernise document management practices.
- Supervisors focused on implementing efficient document strategies.
- Controllers responsible for ensuring compliance with regulations.
- Administrators tasked with maintaining data security.
- Personnel striving for excellence and innovation in document-centric roles.

Program Outline:

DAY 1: Overview of Electronic Document Management System (EDMS)

1. Comprehending the basics of EDMS and its significance within organisations.

2. Advantages of moving from traditional paper systems to EDMS.
3. Essential characteristics of EDMS platforms.
4. Functions and capabilities of EDMS platforms.
5. Methods for organizing, indexing, and retrieving documents.

DAY 2: EDMS Deployment and Integration

1. Strategic approaches for the implementation of EDMS in organisations.
2. Incorporating EDMS with current software and workflows.
3. Setting up user permissions and access controls to ensure data security.
4. The importance of training employees on how to use and navigate EDMS.
5. Conducting tests and troubleshooting during the implementation process.

DAY 3: Document Acquisition and Transformation

1. Methods for capturing and converting paper documents into EDMS.
2. Utilizing scanning devices and OCR technology for document conversion.
3. Recommended practices for extracting metadata and automating capture workflows.
4. Maintaining document accuracy and quality throughout the digitisation process.
5. Techniques for batch processing and effective document capture.

DAY 4: Document Structuring and Administration

1. Developing hierarchical folder systems for effective EDMS organisation.
2. Applying metadata tagging and classification to facilitate easy retrieval.
3. Managing version control and tracking document revisions to uphold integrity.
4. Utilising collaboration tools for joint authorship and document review.
5. Establishing retention policies and archival processes for lifecycle management.

DAY 5: Enhanced Features and Customisation Options

1. Investigating advanced search capabilities and filtering mechanisms.
2. Tailoring user interfaces and dashboards to meet organisational requirements.
3. Integrating workflow automation tools to enhance document processes.
4. Implementing templates and standardised workflows for uniformity.
5. Utilising reporting and analytics to evaluate and enhance document performance.