Course : Electronic document management, strategy and implementation

Synthesis course - 2d - 14h00 - Ref. GDO
Price : 1720 € E.T.

This course will give you an overview of all aspects of EDM: techniques, formats and standards. It will introduce you to the different components of an EDM system and analyze current market trends and techniques. It will also cover the implementation of an EDM solution.

Teaching objectives

At the end of the training, the participant will be able to:

- Mastering the regulatory framework and EDM standards
- Understanding technologies and software architectures
- Understand the EDM market and its main trends
- Implement an operational EDM solution tailored to your needs

Intended audience

Project managers, archivists, documentalists, and anyone involved in the use of an EDM application.

Prerequisites

No special knowledge required.

Course schedule

1 General issues

- Definitions: document, EDM, DMS.
- From individual documentary production to shared documentary production.

PARTICIPANTS

Project managers, archivists, documentalists, and anyone involved in the use of an EDM application.

PREREQUISITES

No special knowledge required.

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more.
Participants also complete a placement test before and after the course to measure the skills they've developed.

2 The acquisition chain

- Digital acquisition. Metadata : Dublin Core, MARC...
- Text and image formats. OCR, ICR, IDR, RAD, LAD. Indexing.
- Storage: media (WORM, CD-ROM, DVD...), architectures (DAS, NAS, SAN), software (SRM, SNM).
- Archiving: regulatory framework, standards (Z42-013, ISO WD 18509, ISO 15489), formats (XML, PDF/A...).

3 The digital document, from acquisition to workflow

- Standards bodies (ISO, CEN, ANSI, etc.).
- Document structuring : ODA, SGML, SPDL...
- Web languages (HTML, XML, CSS, XSL, DTD...).
- Industry standards (PostScript, PDF, etc.).

4 Software offering

- Modules: Cold. Document management, content management, workflow, groupware. Portals. Records management.
- Knowledge management. Monitoring, indexing, searching. Main proposed standards.
- Types of architecture: client/server, intranet/Internet... Underlying technologies (XML, J2EE...).
- Supported operating systems and databases. Financial aspects: pricing methods.

5 EDM market trends and developments

- The major players.
- French solutions and Open Source.
- Service providers.

6 Implementation of an EDM solution

- The players in an EDM project. Project stages.
- Drawing up specifications.
- Necessary documents.

7 Designing a filing plan

- Define document use cases. Create activity classification plan.
- Identify user types. Formalize document flows. Define naming rules.
- Some useful tools: GATE, UIMA, Rapid Miner...

8 Define an indexing strategy

- Different types of organization. Authority lists.
- From thesaurus to document indexing. Example of a thesaurus (Corbis). ISO 2788-1986 and ISO 5964-1985.

Dates and locations

REMOTE CLASS
2026 : 26 Mar., 4 June, 15 Sep., 19 Nov.

PARIS LA DÉFENSE
2026 : 4 June, 15 Sep., 19 Nov.