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Course : From dematerialization to digital transformation, summary and implementation

Synthesis course - 2d - 14h00 - Ref. DMA
Price : 2020 CHF E.T.

This seminar analyzes the challenges and benefits of dematerialization in the various strategic areas of a company, as part of a global approach to digital transformation. You will see the conditions for success, from the definition of the master plan to its implementation. This seminar covers current market standards (archiving, EDM, security, cloud, artificial intelligence, etc.) as well as the technical solutions available for integration into your information system.

Teaching objectives

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

- Discover the advantages and disadvantages of a dematerialization approach
- Evaluate the main aspects of a dematerialization approach
- Categorize norms, standards, laws, decrees and solutions concerning a dematerialization approach
- Understanding the legal framework in France and Europe
- Establish a methodology for implementing a dematerialization project
- Establish a master plan for digital transformation using dematerialization as a lever

Intended audience

Company directors, financial directors, business managers, project managers, controllers, IT managers, consultants, auditors, IT specialists.

Prerequisites

No special knowledge required.

PARTICIPANTS

Company directors, financial directors, business managers, project managers, controllers, IT managers, consultants, auditors, IT specialists.

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.

Practical details

Teaching methods

This seminar, based on a number of practical case studies, will give you a practical understanding of dematerialization as part of a digital transformation process (setting up a master plan, presenting a dematerialization project, implementing electronic signatures, etc.).

Course schedule

1 Dematerialization challenges and approach

- Dematerialization at the service of business transformation.
- The challenges: productivity gains, process optimization, performance gains, multi-channel.
- The areas concerned. Benefits. Main obstacles.
- Classic challenges and mistakes.
- How do you move from a silo-based organization to an integrated one?
- How can we harmonize the processing of requests made in person or by telephone, mail or e-mail?
- How do you measure application performance for each channel?

2 The dematerialization master plan

- What are the challenges involved in aligning digital transformation strategy and dematerialization?
- Top-down approach: the "personas and customer journey" digitalization process.
- The ROI approach: the MAREVA method (method for analyzing the value of information system projects).
- Bottom-up approach: analysis by value (criticality, organizational maturity, risks).

3 How do you successfully implement a dematerialization project?

- Organization and governance. Change management.
- What role can the IT department play in supporting the organization in this new approach?
- The main approaches. Process re-engineering and organization.
- The process-oriented approach. Process modeling: BPMN.
- The classic V-cycle approach. The Agile approach. Advantages and limitations.
- The co-construction method with a mix of Agile and classic methods.

4 The signature pad and electronic signature

- Technical definitions (hashing, CRL, etc.).
- Digital identity (classes 1, 2 and 3).
- Certificate production (smart card, PI code, etc.).
- The chain of trust: ANSSI, RGS...
- Electronic signature formats: XAdES, CAdES, PAdES.
- Mobility: iOS, Android, Microsoft constraints.
- Interoperability: signature formats, connectors, etc.

TEACHING AIDS AND TECHNICAL RESOURCES

• The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
• At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
• A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

5 Dematerialization and data governance

- Why is data governance so central to dematerialization?
- What are the benefits of good data management and governance?
- Analysis of data maturity and quality.
- The Big Data approach and the structured Master Data Management (MDM) approach.
- What is the best way to set up such governance?
- Technical challenges and risks (MDM repository, etc.).

6 Business Intelligence, Big Data and Artificial Intelligence for dematerialization

- Business intelligence in a dematerialization context: why and for whom?
- Using processes to set up indicators.
- Real-time flow optimization indicators.
- The cross-channel optimization process.
- Technical architecture: ETL, infocenter, business software integration.
- From infocenter to data warehouse.
- A reminder of the main principles of Artificial Intelligence.
- Predictability to improve processes, decisions and performance.
- Learning processes to better support the organization.

7 The legal framework

- Electronic signatures: European directives (eIDAS, etc.), implementing laws and decrees.
- CNIL and RGPD.
- Electronic archiving: NF Z 42-013 standard.
- Document standards: ODF, OOXML, RSS...

8 Overview of dematerialization solutions

- Legal or probative value archiving. Electronic archiving. The Cloud and legal issues.
- The Cloud: Office 365, third-party archivers (CDC Arkhinéo, Docapost).
- Security: issuer authentication, electronic certificates, cryptography. General guidelines.
- Signature and EDM systems. Integration with business software.
- Tools: Business Process Manager (BPM), Business Activity Management.
- Enterprise Service Bus (ESB). Extract, Transform & Load (ETL).
- Integration protocols: Webservice (SOAP, REST), CMIS, LDAP, SIP.
- Cloud-based versus integrated solution. Integration of new media: tablet, smartphone.

Dates and locations

REMOTE CLASS
2026 : 17 Mar., 9 June, 24 Sep., 17 Nov.