Consultant Certification

Training for Information Professionals

openkm
KnowledgeManagement

Master Document Management with OpenKM Academy: Training for Information Professionals

Looking to boost your career in document management? [OpenKM Academy](#) offers a range of courses designed to meet the needs of professionals, businesses, and institutions. Our training combines theory and practice with the most advanced tools from OpenKM, the leading document management software.

Why choose OpenKM Academy?

- **Personalized Learning:** Discover courses adapted to your level and objectives.
- **Practical Experience:** Access practical exercises and real cases that reinforce your learning.
- **Recognized Certifications:** Earn credentials that validate your document management competencies.
- **Comprehensive Training:** From basic users to expert consultants, we have the ideal course for you.

Consultant Certification

Transform your clients' document management with proven strategies. This course teaches the design, implementation, and maintenance of OpenKM systems tailored to the needs of each organization.

- **Highlights:** Learn how to analyze business processes and apply international standards.
- **Who it's for:** Consultants, analysts, and project managers.

MODULE 1. DOCUMENT MANAGEMENT IN COMPANY PROCESSES
OBJECTIVES
- Identify the importance of documents in the context of the company
- Acquire the fundamentals and vocabulary of document management.
- To approach the main international standards related to document management.
- Understanding the benefits of standardization

M01.01. DOCUMENTS, BUSINESS AND KNOWLEDGE SOCIETY

- Benefits of document management in companies
- Physical archive and electronic archive. The same need, the same solution Challenges of document management
- The profile of the document management professional

M01.02. FUNDAMENTALS OF DOCUMENT MANAGEMENT. BASICS

- Document management and intelligent organizations
- Document management in the context of Data Management Systems
- Document. Support, registration, format and document types Document values (life cycle)

M01.03. GOOD PRACTICES FOR DOCUMENT MANAGEMENT
- International standards for document management
- Terminology for document management The importance of standardization

MODULE 2. DESIGN OF A DOCUMENT MANAGEMENT SYSTEM
OBJECTIVES
- Identify document requirements
- Analyze an organization's work processes.
- Know the phases of the implementation of a document management project
- Design the instruments that make up the document management model

M02.01. CONTEXTUAL ANALYSIS AND DOCUMENT NEEDS IN THE COMPANY
- Analysis of the internal and external context
- Identifying document requirements Business requirements
- Legal and regulatory requirements
- Requirements. Reliable documents Processes and document production
- Archiving techniques: analysis and standardization of processes

M02.02. PARAMETERS FOR THE DEFINITION OF THE DMS
- Identification of strategies to meet the requirements The Document Management policy

M02.03. THE CONSTRUCTION OF THE DOCUMENT MANAGEMENT SYSTEM
- The components of the system
- The processes and instruments of the DMS
- Operational requirements for Document Management processes, instruments and applications
- Metadata in the context of DMS Document creation, capture and registration
- Classification and description of documentation
- Leaderboard
- Arrangement and conservation of documentation Map of documentary series
- Security and access tables Retention calendar

MODULE 3. CONFIGURATION AND PARAMETERIZATION OF OPENKM PRACTICAL APPLICATION
OBJECTIVES
- Carry out basic OpenKM demos with autonomy.

- Support the administrator and developers in the parameterization of OpenKM.
- Answer questions about the functional and technical features of OpenKM.

M03.01. INTRODUCTION TO OPENKM
- What is a document management tool?
- What is Openkm? Functional and technical features of the User Interface
- Admin panel items

M03.02. OPENKM CONFIGURATION
- Metadata schema
- Default metadata
- Creating New Metadata Groups
- Types of documents and files
- Security: Roles and Users
- User Management
- Role Management
- Profile Management

M03.03. PRACTICAL APPLICATION IN OPENKM
- Practical application: The instruments of the Classification system
- Folder tree
- Automatic cataloguing
- Documentary series

M03.04. OPENKM INFORMATION RETRIEVAL
- Exploitation of information
- Configuring searches
- Syntax for Performing Searches
- LUCENE Interrogation Language