

OPENKM CERTIFIED CONSULTANT

MODULE 1. DOCUMENTARY MANAGEMENT IN THE COMPANY'S PROCESSES

Objectives

- Identifying the importance of documents in the context of the company
- Acquire the basics and vocabulary of document management.
- Approach the primary international standards related to document management.
- Understanding the benefits of normalization

M01.01. DOCUMENTS, COMPANY AND KNOWLEDGE SOCIETY

Benefits of document management in companies

Physical file and electronic file. The same need, the same solution

Challenges of document management

The profile of the document management professional

M01.02. BASICS OF DOCUMENT MANAGEMENT. BASICS

Document management and innovative organizations

Documentary management in the context of Management Systems

From data to knowledge

Document. Support, registration, format, and documentary types

Document values (lifecycle)

M01.03. GOOD PRACTICES FOR DOCUMENT MANAGEMENT

International standards for document management

Document management terminology

The importance of normalization

MODULE 2. DESIGNING A DOCUMENTAL 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 DOCUMENTARY NEEDS IN THE COMPANY

Internal and external context analysis

Identification of document requirements

Business requirements

Legal and regulatory requirements

Requirements. Reliable documents

Processes and document production

File techniques: analysis and standardization of processes

M02.02. PARAMETERS FOR DMS DEFINITION

Identifying strategies to meet the requirements

Documentary Management Policy

M02.03. CONSTRUCTION OF THE DOCUMENT MANAGEMENT SYSTEM

Components of the system

DMS processes and instruments

Operational requirements for processes, instruments, and document management applications

Metadata in the context of DMS

Document creation, capture, and registration

Classification and description of the documentation

Leader board

Provision and preservation of documentation

Documentary series map

Security and access tables

Conservation calendar

MODULE 3. SETUP AND PARAMETERIZATION OF OPENKM PRACTICAL APPLICATION

Objectives

- Perform basic demos of OpenKM with autonomy.
- Support the administrator and developers in setting up OpenKM.
- Answer questions about the functional and technical characteristics of OpenKM.

M03.01. INTRODUCTION TO OPENKM

What is a document management tool?

What is OpenKM? UI functional and technical characteristics

Admin settings

M03.02. SETTING UP OPENKM

Metadata outline

Default Metadata

Creation of new metadata groups

Document types and records

Security: Roles and users

User management

Role management

Profile management

M03.03. PRACTICAL APPLICATION IN OPENKM

Practical application: The system instruments

Classification

Folder tree

Automatic cataloging

Documentary series

M03.04. OPENKM INFORMATION RETRIEVAL

Exploitation of information

Search settings

Search syntax

LUCENE interrogation language