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COURSE BROCHURE

Intelligent Document Capture and Workflow Automation Training Course

23 – 27 August 2027
Paris

Intelligent Document Capture and Workflow Automation Training Course

Ref: 718_26897 **Date:** 23 – 27 August 2027 **Location:** Paris **Fees:** 5900 GBP

Intelligent Document Capture and Workflow Automation is a 1-week training course for document controllers, records managers and digital transformation staff, in which each participant drafts an automation use case plan for their organisation. Invoices, drawings, contracts and correspondence still arrive faster than people can index them, and machine learning now reads, sorts and routes much of that intake. Jupiter Prime Training runs this course for teams deciding what to automate.

Why Intelligent Document Capture and Workflow Automation Matters Now

Three forces shape this subject. Capture engines combining optical character recognition with machine learning now extract fields from unstructured pages at volume. Low-code workflow bots let business units build routing rules without central oversight. Auditors and legal teams ask how an automated decision about a record can be explained and reversed. Organisations that choose use cases carefully cut indexing backlogs and keep trustworthy evidence; those that automate blindly misfile records at machine speed. The course draws on ISO 15489-1 for records principles and ISO 16175 for the functions records software must keep when automation is added.

Who Gains Most from Intelligent Document Capture and Workflow Automation

- Controllers who register incoming drawings, transmittals and correspondence
- Records leads who set classification rules, retention triggers and metadata schemes
- Transformation analysts who shortlist processes for bots and capture engines
- Systems administrators who configure capture servers, connectors and queues
- Quality reviewers who sample automated output and correct misreads

A mixed group of controllers, records leads and transformation analysts from one organisation gains most, since each automation choice touches all three.

Intelligent Document Capture and Workflow Automation Capabilities

Participants learn to judge where machine reading and routing help, where they harm evidence quality, and how to keep a human check in place.

- Assess intake processes for capture and bot suitability — transformation sponsors
- Specify extraction fields and confidence thresholds — systems administrators
- Design auto-classification rules mapped to the file plan — records leads
- Test recognition accuracy on sample batches — quality reviewers
- Weigh explainability and reversal needs for automated decisions — auditors and legal teams
- Build a prioritised list of automation candidates — investment committees

Key Intelligent Document Capture and Workflow Automation Terms

- Optical character recognition OCR — software that converts printed or typed text in an image into machine-readable characters.
- Intelligent capture — recognition combined with machine learning that finds and extracts named fields from varied document layouts.
- Confidence score — the engine's estimate of how likely an extracted value is correct, used to route doubtful items to people.
- Auto-classification — assigning a record class or file plan node to a document by rules or trained models.
- Workflow bot — a scripted agent that moves, renames, notifies or approves items according to set rules.
- Human-in-the-loop — a design in which people confirm or correct automated outputs before they become official records.

Intelligent Document Capture and Workflow Automation Day by Day

Day 1: Automation Pressures on Document Intake

- Intake Volume and Backlog Mapping — Where Manual Indexing Breaks Down
- Machine Learning Capture Market Overview — Realistic Capability Limits
- Records Principles From ISO 15489-1 — Evidence Qualities Automation Must Keep
- Process Candidate Scoring Grid — Volume, Variety and Error Cost
- Stakeholder Map for Automation Choices — Sponsors, Owners and Reviewers

Day 2: Recognition and Field Extraction

- OCR Engines and Image Pre-Processing — Accuracy on Scans and Photos
- Template and Template-Free Extraction — Fixed Forms Versus Varied Layouts
- Confidence Thresholds and Exception Queues — Routing Doubtful Fields to People
- Handwriting and Arabic Script Recognition — Known Weak Points
- Training Sample Sets — Labelling Pages for Model Learning

Day 3: Classification and Metadata Automation

- Rule-Based Versus Trained Auto-Classification — File Plan Mapping Choices
- Metadata Extraction Into Registers — Titles, Parties, Dates and Revisions
- Duplicate and Near-Duplicate Detection — Version Hygiene in Repositories
- Retention Trigger Automation — Linking Classes to Disposal Events
- ISO 16175 Functional Checks — What Records Software Must Still Enforce

Day 4: Workflow Bots and AI Oversight

- Bot Design for Routing, Renaming and Approvals — Exception Handling
- Transmittal and Invoice Flow Case Studies — Construction and Finance Examples
- Explainability and Audit Logging for Automated Decisions — Reversal Rights
- Model Drift Monitoring — When Accuracy Falls Over Time
- AI Tool Approval Rules — Who Signs Off a New Automation

Day 5: Practising the Automation Use Case Plan

- Scoring Own Intake Processes on the Candidate Grid — Shortlist
- Setting Thresholds and Review Sampling for a Chosen Flow — Quality Gate
- Drafting Classification and Metadata Rules for That Flow — File Plan Fit
- Estimating Effort, Benefit and Risk per Use Case — Funding Order
- Completing the Automation Use Case Plan — Sponsor Sign-Off

Applying Intelligent Document Capture and Workflow Automation After the Course

- Run a recognition accuracy test on one hundred pages from a high-volume intake stream and record field-level error rates.
- Score three candidate processes on the candidate grid and present the top one with its exception queue design to the sponsor.

Intelligent Document Capture and Workflow Automation Questions FAQ

What is Intelligent Document Capture and Workflow Automation and why does it matter now?

It is the use of recognition, machine learning and bots to read, classify and route documents. It matters now because intake volumes outpace manual indexing while auditors expect automated decisions to be explainable.

Which roles gain most from Intelligent Document Capture and Workflow Automation?

Document controllers, records managers and digital transformation staff gain most, since each shapes what gets automated.

How does Intelligent Document Capture and Workflow Automation differ from a general records management course?

It focuses on automating intake rather than designing the whole records system. It covers extraction, thresholds, bots and AI oversight rather than file plans and archives.

What do you bring back from Intelligent Document Capture and Workflow Automation?

You bring back a scored shortlist of automation candidates with thresholds, review sampling, classification rules and estimated effort for each, ready for sponsor approval.

Intelligent Document Capture and Workflow Automation: The Way Forward

The automation use case plan ranks intake processes by benefit and risk and sets thresholds, review sampling and classification rules for each. Its first use is choosing which flow to automate before any licence is bought. Controllers, records leads and transformation analysts maintain it. Revisit thresholds after the first month of live output, since real exception rates show whether human review is placed correctly.