



## Technical Business Analyst / Implementation Specialist

**Department / Team:** Document Management

**Work Format:** Hybrid – in-office or on-site as required (Tuesday, Wednesday, Thursday) with optional work-from-home days (Monday, Friday).

**Primary Office Location:** Markham, ON

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## Role Summary

The **Technical Business Analyst / Implementation Specialist** is responsible for the end-to-end delivery of document management and digital transformation projects for clients. This role combines **technical configuration expertise**, **business analysis**, and **project management** to design, implement, and support platforms such as **Canon Therefore™** and **NetDocuments**.

The ideal candidate will possess a deep understanding of document management principles, metadata design, automation workflows, and system integration — with strong consultative skills to collaborate effectively with clients, vendors, and internal teams.

## Key Responsibilities

### Solution Design & Implementation

- Design and implement document management solutions tailored to client requirements and compliance needs.
- Configure, administer, and maintain **NetDocuments** and **Canon Therefore™** environments.
- Develop, test, and deploy automated workflows to streamline document handling and reduce manual processes.
- Conduct business process assessments and develop documentation, configuration blueprints, and digital transformation strategies.
- Ensure secure, compliant, and user-friendly document storage and retrieval aligned with frameworks such as **GDPR**, **HIPAA**, and **ISO 27001**.

### System Integration & Configuration

- Integrate document management systems with client applications (e.g., **Microsoft 365**, **CRM**, **ERP**).
- Customize and configure workspace structures, metadata fields, document templates, and access controls.
- Support **data migration** activities, including planning, validation, and execution.
- Utilize **API/Web Services** for integration and automation between platforms.

## Training, Testing & Client Support

- Conduct client and internal training sessions to promote system adoption and best practices.
- Coordinate and support **User Acceptance Testing (UAT)** and validation processes.
- Provide post-implementation support and performance optimization.
- Maintain detailed system documentation and configuration guides.

## Project Management

- Plan, coordinate, and execute project phases from discovery to go-live and post-launch support.
- Collaborate with clients, vendors (Canon, NetDocuments), and internal stakeholders to ensure deliverables are met.
- Track progress, identify risks, and communicate status updates to leadership.
- Manage project documentation, schedules, and budgets as required.

## Additional Duties & Team Contributions

- Serve as a point of contact between “**The Company**”, **Canon**, **NetDocuments**, and client stakeholders.
- Participate in team meetings, internal knowledge-sharing sessions, and certification programs.
- Support recruitment, onboarding, and mentoring of future document management team members.
- Maintain up-to-date technical and vendor certifications relevant to DMS platforms.

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## Required Skills & Competencies

### Education & Experience

- Bachelor’s degree in **Computer Science**, **Information Management**, or a related discipline (or equivalent experience).
- Minimum **3–5 years** of experience implementing or supporting document management systems (NetDocuments, Canon Therefore™, or similar).
- Demonstrated success in delivering technical projects that combine configuration, integration, and user training.

## Technical Skills

- **NetDocuments** – configuration, workspace design, metadata, user permissions, and integration.
- **Canon Therefore™** – installation, configuration, workflow automation, and administration.
- **Microsoft 365** – Outlook, Teams, Word, Excel; integration with DMS platforms.
- **Microsoft SharePoint (DMS)** – document libraries, permissions, and integration.
- **API/Web Services** – basic working knowledge for automation and data synchronization.
- **SQL** – basic query skills for validation, troubleshooting, and data mapping.
- **CRM/ERP awareness** – Dynamics, Salesforce, SAP integration points.
- **ConnectWise** – daily operational use for project tracking and service delivery.
- **Remote Desktop/VPN tools** – for client environment access.

## Core Competencies

- Strong analytical and problem-solving skills.
  - Excellent communication and interpersonal skills for technical and non-technical audiences.
  - Proven ability to manage multiple priorities and meet deadlines.
  - High attention to detail, organization, and documentation accuracy.
  - Client-focused mindset with a consultative approach.
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## Certifications (Required or to be Obtained within First 90–180 Days)

- **Canon Therefore™ Certified Professional** (*priority – vendor requirement*)
  - **NetDocuments Administrator or Implementation Certification**
  - **Microsoft 365 Fundamentals (MS-900)**
  - **The Ultimate SQL Bootcamp: Zero to Hero in 9 Hours (Coursera)**
  - **Information Governance / Compliance Training (ISO, GDPR, HIPAA)**
  - **ITIL Foundation Certification** (*recommended*)
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## Tools & Platforms

- Canon Therefore™
- NetDocuments
- Microsoft 365 Suite (Outlook, Word, Excel, Teams)
- Dynamics, Salesforce, SAP
- ConnectWise PSA
- API / Web Services

## Preferred Qualifications

- Experience with **legal, financial, or compliance-heavy** environments.
- Exposure to **enterprise content management (ECM)** systems.
- **Business Analysis (CBAP/CCBA)** or **Project Management (PMP/Prince2)** certifications.
- Familiarity with **workflow automation and reporting tools** (Power Automate, PowerBI).
- DocuWare, Laserfiche, OpenText (exposure preferred)
- Microsoft SharePoint (DMS)

## Additional Information

This job description does not constitute a written or implied contract of employment.

BoloNet Inc and our Client for this position are equal opportunity employers and value diversity in its workforce, encouraging applications from all qualified individuals.

BoloNet Inc and our Client for this position are committed to providing an inclusive and accessible candidate experience. We will work with you on an individual basis to meet any reasonable accommodation needs. Please let us know if you require any accommodation to participate in the recruitment and selection process.

By applying to this position, you are confirming you possess either a Canadian citizenship, permanent resident status or valid work permit.

**Please note:** Reference Checks, and/or Criminal Background Checks may be administered on suitably qualified candidates.