

ARCHIVING & DOCUMENTATION MANAGEMENT



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Introduction

Documents accumulate whether or not an organization is ready for them, and the archive becomes either a dependable resource or a daily obstacle. Managing that flow well means knowing how to file, retain, protect, and retrieve every record the business depends on. This Archiving & Documentation Management Training Course gives participants a practical system for that work. Furthermore, it covers classification and filing, retention and disposal, digitization, archive storage, access control, and legal compliance. Participants also learn to build a documentation standard their colleagues can follow. As a result, they leave able to keep an archive that is findable, secure, and legally sound.

Archiving & Documentation Management Course Objectives

- Apply records lifecycle principles from creation to disposal or preservation.
- Build file plans, classification schemes, and naming conventions.
- Design retention and disposal schedules with legal justification.
- Implement metadata and indexing for reliable retrieval.
- Plan scanning and digitization projects with quality controls.
- Organize archive storage with environmental and shelving standards.
- Apply document control for versioning, approvals, and audit trails.
- Protect records with access permissions, encryption, and backup practices.
- Meet legal admissibility and privacy obligations for records.
- Align practice with ISO 15489 guidance and evaluate archive systems.

Course Methodology

- Interactive workshops built around real document collections.

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- Guided design of classification schemes and retention schedules.
- Metadata, indexing, and storage layout exercises.
- Scanning, digitization, and quality-check simulations.
- Case studies from government, healthcare, legal, and corporate archives.
- Action planning that links each practice to the participant's own records.

Who Should Take This Course

- Records, documentation, and archive officers.
- Archivists and information management assistants.
- Administrative and office staff handling filing duties.
- Compliance, legal, and audit support staff.
- IT staff supporting document and archive systems.
- Employees responsible for scanning, filing, or archiving.

Archiving & Documentation Management Course Outlines

Day 1: Foundations of Documentation and Archives

- Defining documents, records, and archives.
- Explaining the records lifecycle from creation to disposal.
- Applying ISO 15489 records management principles.
- Understanding legal, fiscal, and operational retention needs.
- Identifying risks of poor documentation practice.
- Assessing current documentation maturity.
- Completing a personal documentation audit.





Day 2: Classification, Filing, and Indexing

- Building file plans and hierarchical classification schemes.
- Designing naming conventions and folder structures.
- Applying metadata standards for searchability.
- Indexing documents with consistent keywords and attributes.
- Applying document control for versions and approvals.
- Managing confidentiality levels and access permissions.
- Drafting a classification and filing standard.

Day 3: Retention, Disposal, and Compliance

- Designing retention schedules by record type.
- Applying legal hold and litigation preservation requirements.
- Planning secure disposal and destruction methods.
- Meeting audit, regulatory, and evidence obligations.
- Managing personal data and confidentiality duties.
- Documenting retention decisions and approvals.
- Building a retention schedule.

Day 4: Digitization and Archive Storage

- Planning scanning projects with quality benchmarks.
- Applying OCR, resolution, and image quality standards.
- Designing electronic archive structures and repositories.
- Ensuring legal admissibility of digitized records.
- Applying shelving, environmental, and storage controls for physical archives.

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- Managing hybrid paper and digital environments.
- Reviewing a digitization and storage plan.

Day 5: Systems, Security, and Continuous Improvement

- Evaluating document and archive management systems.
- Applying access control, encryption, and audit trails.
- Meeting information security and data protection requirements.
- Training staff and building documentation discipline.
- Measuring performance with retrieval, accuracy, and compliance metrics.
- Reviewing the system and planning improvements.
- Preparing a 90-day archiving and documentation action plan.

Conclusion

By successfully completing Archiving & Documentation Management, participants will gain the knowledge to classify documents, design retention schedules, and build secure archives that serve legal, operational, and historical needs. They will acquire skills in documentation classification, retention and compliance, digitization and archive storage, and archive security and system management that strengthen control and audit readiness. Gentex Training Center builds this course around real document collections, so learners return ready to manage documentation and archives with order, security, and confidence.

FAQs





Q1 What is the "Archiving & Documentation Management" course about?

It covers how to manage documents and archives through their full lifecycle. The course addresses classification and filing, metadata and indexing, retention and disposal, digitization and scanning, archive storage, access control, legal admissibility, and document management systems.

Q2 What are the key benefits of the "Archiving & Documentation Management" course?

Participants reduce time lost searching for documents, keep records legally defensible, and pass audits with less effort. They also protect confidential information properly, plan storage and disposal deliberately, and maintain an archive that stays usable as volumes grow.

Q3 What skills will I gain from the "Archiving & Documentation Management" course?

You will gain documentation classification and filing design, retention and compliance management, digitization and archive storage, and archive security and system management. These four skills work together to give an organization reliable control over its documentation and archives.



Q4 What tools, methods, or standards are covered in the "Archiving & Documentation Management" course?

The course covers ISO 15489 records management principles, file plans and hierarchical classification schemes, naming conventions and folder structures, metadata standards, document control for versioning and approvals, retention and disposal schedules, legal hold procedures, OCR and scanning quality benchmarks, storage and environmental controls, access permissions and encryption, audit trails, and document management system evaluation criteria.

Q5 How is the "Archiving & Documentation Management" course applied in real-world practice?

Participants build a classification scheme and retention schedule for their own record types, design and test a digitization workflow, and plan archive storage. They also apply access and audit trail controls and complete a 90-day plan for improving documentation practice in their role.