

PRESERVING DOCUMENTS AND DATA AND ARCHIVING THEM ELECTRONICALLY



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TRAINING CENTER



Introduction

Information now outlives the systems that created it, and unprotected documents and data disappear quietly through corruption, format change, or simple neglect. The Preserving Documents and Data and Archiving them Electronically Training Course prepares records officers, administrators, and IT staff to keep organisational information intact for as long as it is needed. Participants learn to structure electronic archives, apply metadata and indexing standards, and run reliable backup and storage routines. Furthermore, the course covers digitisation, digital preservation risks, retention and disposal rules, and access control. In addition, it addresses personal data protection and audit evidence. As a result, teams gain archives that remain findable, readable, and legally defensible over time.

Preserving Documents and Data and Archiving them Electronically Course Objectives

- Apply ISO 15489 records management principles to electronic archives.
- Design folder structures, taxonomies, and naming conventions for digital filing.
- Assign metadata using Dublin Core and ISAD(G) standards for retrieval.
- Run digitisation projects covering scanning, OCR, and quality assurance.
- Implement backup, replication, and disaster recovery for archived data.
- Apply digital preservation strategies using the OAIS reference model.
- Set retention and disposal schedules aligned with legal requirements.
- Apply access control, encryption, and personal data protection practice.
- Verify archive integrity with checksums and audit trails.
- Audit electronic archives and report compliance performance to management.

Course Methodology

- Instructor-led sessions combining records theory with hands-on system work.

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- Guided exercises in metadata tagging, indexing, and file structuring.
- Configuration labs in an electronic document and records management system.
- Case studies on data loss, format obsolescence, and compliance failures.
- Group workshops to build a retention schedule and preservation plan.
- Continuous knowledge checks and a final applied archiving project.

Who Should Take This Course

- Records officers and archivists.
- Document control and information management staff.
- Administrative supervisors handling corporate records.
- IT staff responsible for storage, backup, and archiving systems.
- Compliance officers managing record retention.
- Data protection and governance coordinators.

Preserving Documents and Data and Archiving them Electronically Course Outlines

Day 1: Foundations of Electronic Archiving

- Document and data lifecycle from creation to disposal.
- ISO 15489 records management principles and governance.
- Legal, regulatory, and audit requirements for archived records.
- Physical, digital, and hybrid archive environments.
- Roles and responsibilities in an archiving function.
- Archiving policy, procedure, and standards documentation.
- Workshop: auditing a current archiving environment.





Day 2: Structuring, Indexing, and Metadata

- Folder structures, taxonomies, and naming conventions.
- Indexing techniques for fast and accurate retrieval.
- Metadata standards: Dublin Core and ISAD(G).
- Controlled vocabularies and thesauri for consistency.
- Version control and document identification codes.
- Full-text search and indexing configuration.
- Workshop: structuring and tagging a document set.

Day 3: Digitisation and Digital Preservation

- Scanning standards, resolution, and file formats.
- Optical character recognition (OCR) and accuracy checks.
- Digitisation workflow design and quality assurance.
- Storage architecture, redundancy, and backup scheduling.
- Digital preservation: format migration and the OAIS reference model.
- Integrity checks with checksums and fixity verification.
- Workshop: building a digitisation and preservation workflow.

Day 4: Security, Retention, and Data Protection

- Access control models and permission management.
- Encryption at rest and in transit for archived data.
- Personal data protection and privacy requirements.
- Retention and disposal schedules and legal holds.
- Managing e-discovery and information requests.

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- Disaster recovery and business continuity for archives.
- Workshop: configuring retention rules and access levels.

Day 5: Audit, Monitoring, and Continuous Improvement

- Archiving audits and compliance assessments.
- Log monitoring, alerts, and audit trails.
- Reporting archive performance to management.
- Staff training and information awareness programmes.
- Measuring retrieval speed and archive quality KPIs.
- Planning an electronic archiving improvement roadmap.
- Workshop: presenting an archiving improvement plan.

Conclusion

By successfully completing the Preserving Documents and Data and Archiving them Electronically Training Course, participants will have acquired the knowledge to structure electronic archives, apply metadata and indexing standards, run digitisation and preservation workflows, and protect archived information through security and retention controls. They will also gain the ability to verify archive integrity and support legal and regulatory compliance. Furthermore, the course prepares teams to keep organisational knowledge accessible over the long term. Gentex Training Center delivers this programme with a strong emphasis on practical, workplace-ready archiving practice.

FAQs





Q1 What is the "Preserving Documents and Data and Archiving them Electronically" course about?

It is a practical programme on keeping documents and data safe and usable in electronic archives. It covers archive structuring, indexing and metadata, digitisation, digital preservation, backup and recovery, access control, retention and disposal rules, and compliance auditing.

Q2 What are the key benefits of the "Preserving Documents and Data and Archiving them Electronically" course?

Participants gain archives that stay findable, readable, and legally valid over the long term, which reduces the risk of losing critical records. The course lowers storage and paper costs, improves readiness for audits and information requests, and strengthens protection of personal and confidential data.

Q3 What skills will I gain from the "Preserving Documents and Data and Archiving them Electronically" course?

Electronic archive structuring, indexing and metadata application; digitisation and digital preservation workflows; backup, recovery and archive integrity verification; and retention, access control and data protection practice.



Q4 What tools, methods, or standards are covered in the "Preserving Documents and Data and Archiving them Electronically" course?

The course covers ISO 15489 records management, Dublin Core and ISAD(G) metadata standards, the OAIS reference model for digital preservation, optical character recognition (OCR) tools, checksum-based integrity verification, backup and replication routines, electronic document and records management systems, retention and disposal schedules, and archive audit methodology.

Q5 How is the "Preserving Documents and Data and Archiving them Electronically" course applied in real-world practice?

Graduates apply it by building structured electronic archives with clear folder and naming rules, digitising paper files with quality checks, and scheduling backups and integrity tests. They also configure retention and access rules, respond to audits and information requests, and train colleagues on safe handling of electronic records.