



Administration and Office Efficiency

# Principles of Document Records and Archives Management

## Course Introduction

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Record keeping is essential for every business and organization. All purchases, sales, client and employee communications as well as legal and tax documents need to be classified and managed appropriately. Document records and files have life cycles. They are created, received, referred to, revised, refiled, and occasionally reorganized. For the most part, the need to refer to files declines sharply as their age increases.

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### Basic principles of archiving

As records reach the end of their active lives, they are disposed of in various manners: destroyed, reformatted, transferred to inactive storage, or transferred to the archives section. There are, however, some fundamental concepts that most records and archives management systems utilize. This training course is designed to provide delegates with a thorough insight into theoretical principles, methodologies, and practical administration of archiving and record management, as well as the responsibilities of archivists and records managers in today's financial institutions, business organizations, government agencies, and non-profit entities.

## Target Audience

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- Office managers.
- Executive secretaries.
- Administrators and assistants.

## Learning Objectives

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**BY THE END OF THIS LEARNING EXPERIENCE, THE PARTICIPANTS WILL BE ABLE TO:**

- Understand records and archiving management principles, processes, and terminology.
- Understanding of recordkeeping practices and traditions.
- The difference between the responsibilities of archivists and records managers
- Apply knowledge of key aspects of records management practice in various contexts.
- Identify issues that impact on the ongoing management of records that document organizational activities, assess their effect, and develop relevant solutions.

## Course Outline

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- **01 Day One**

- **Archive Management: Principles, Practice, Archive Classification Methods and Database Archiving**

- Introduction to theory and practice:
  - Historical development of the record keeping profession
  - Responsibilities and functions of archivists
  - Differences and similarities between records and archives
  - Acquisition and appraisal:
  - Policy development
  - Methods of acquisition
  - The theory and practice of appraisal
  - Arrangement and description

- **02 Day Two**

- **Archive Services, Access, Indexing, Preservation & Security Users and access:**

- Providing services to users
  - Users and their needs
  - Access restrictions and regulations
  - Legislation
  - Outreach:
  - Reaching a wider audience
  - Publicity and promotion
  - Online resources
  - Outreach and in-reach strategies

- **03 Day Three**

- **Archive Services, Access, Indexing, Preservation & Security**

- Preservation:
    - Identifying risks to archives;
    - Responses to ensure the protection of archives
    - Storage requirements of different media
    - Preservation policies
  - Management:
    - Staff, resource, and time management
    - Policies and procedures
    - Measuring performance

- **04 Day Four**

- **Record Management: Principles, Practice & Archive Backup Methods**

- Organizations and records:
    - Nature of records
    - Making, maintaining and managing records
  - Records management concepts:
    - record life cycle;
    - records continuum
  - Records management programmes:
    - Records management roles & responsibilities;
    - Records management policies;
    - Records systems development methodology
  - Records creation & capture
  - Records classification
  - Records storage
  - Records destruction

- **05 Day Five**

- **Technological Advancements: Electronic & Audio/Visual Records**

- The internet and new technologies
  - Challenges of the management of electronic records in archives and records management?
  - How does the management of visual records differ from that of printed records?
  - Managing and preserving records in a variety of media including audio-visual and electronic records

# Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
April 6, 2025	April 10, 2025	5 days	4250.00 \$	KSA - Riyadh
July 7, 2025	July 11, 2025	5 days	4250.00 \$	UAE - Dubai
Oct. 6, 2025	Oct. 10, 2025	5 days	4950.00 \$	Spain - Barcelona