



Administration and Office Efficiency

Intelligent Archiving and Effective Electronic Organization of Information and Documents

Course Introduction

Record keeping is essential for every business and organization. All purchases, sales, client and employee communications as well as legal and taxation 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. As records reach the end of their active lives, they are disposed in various manner: 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.

Intelligent Archiving

This training course is designed to provide delegates with a thorough insight about 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

This BOOST training course is designed and beneficial professionals handling functions related to document control and records management.

This includes records and information managers, in-house counsel, privacy officers, information security and protection managers, litigation and discovery staff, compliance officers, internal auditors, IT and enterprise content management professionals, and administrative managers

Learning Objectives

- Gain a comprehensive understanding of records and archiving management principles, processes, and terminology.
- Know the fundamental concepts of Electronic Document Management Systems (EDMS)
- Familiarize oneself with recordkeeping practices and traditions.
- Understand 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

- **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

- 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
- 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

• 03 Day Three

Record Management: Principles, Practice & Archive Backup Methods

- Organisations 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

• 04 Day Four

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
- Electronic Document Management System (EDMS)
- Information Management: Digitalization
- EDMS: Definition
- Purpose and Importance of EDMS
- Concept and General Principles of EDMS
- Benefits and Advantages of using EDMS
- Differences between RMS (Records management system) and EDMS
- Challenges of EDMS systems

• 05 Day Five

Electronic Document Management Standards and Regulations

- Information and Data Risk
- Quality management systems – Requirements
- ISO Documentation Requirements
- ISO 9000 and other regulatory Requirements
- Control of documents and management
- Internal and External Audits
- Non-compliant documents
- Corrective and Preventive Action plan
- Tools of EDMS
- Automated Information Capture
- Federated Search & Retrieval
- Collaboration Tools
- Hierarchical File Indexing & Classification
- Connected Archival Methods
- Automated Workflows
- Security & Audit Trails
- Document Metadata
- Version Control
- System-Wide Integration

Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
July 28, 2025	Aug. 1, 2025	5 days	4950.00 \$	Singapore - Singapore
April 28, 2025	May 2, 2025	5 days	2150.00 \$	Virtual - Online
Oct. 26, 2025	Oct. 30, 2025	5 days	4250.00 \$	KSA - Riyadh