Preserving & Archiving Documents & Data Electronically

15 – 19 November 2027
Barcelona (Spain)



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Why This Course

Transitioning from paper-based to digital document management is essential for modern organizations seeking efficiency, accessibility, and long-term preservation of critical records. This intensive 1-week program equips participants with the knowledge and practical skills needed to digitize existing records, implement electronic document management systems EDMS, and maintain sustainable digital archives. Through a combination of hands-on exercises, best practices, and real-world case studies, attendees will learn to streamline document workflows, enhance security, and ensure long-term accessibility.

What You'll Learn and Practice

By attending this course, you will be able to:

- Understand the benefits, challenges, and compliance requirements of electronic document management.
- Implement best practices for digitizing paper records with high-quality standards.
- Create and manage metadata to ensure organized and searchable digital archives.
- Select appropriate file formats, storage solutions, and access controls.
- Develop strategies for long-term digital preservation and managing technological obsolescence.

The Program Flow

Day 1: Introduction to Electronic Document Management

- Overview of EDMS and digital archiving
- Benefits and challenges of transitioning from paper to digital
- Legal and compliance considerations
- Assessing organizational needs and planning the transition

Day 2: Digitization and Scanning

- Document preparation and handling
- Scanning equipment and software selection
- Image quality, resolution, and standards
- Optical Character Recognition OCR techniques

Day 3: Metadata and File Management



- Metadata standards and best practices
- Creating and managing metadata for digital archives
- File naming conventions and organization
- Choosing file formats for long-term preservation

Day 4: Storage and Access

- Digital storage options: local, cloud, and hybrid solutions
- Implementing access controls and security measures
- Backup and disaster recovery planning
- Ensuring searchability and efficient retrieval of records

Day 5: Long-term Digital Preservation

- Challenges and strategies for digital preservation
- File format migration and emulation techniques
- Monitoring and managing technological obsolescence
- Developing a sustainable digital preservation program

Individual Impact

Participants will leave this program with:

- The ability to develop a strategic plan for transitioning to electronic document management.
- Practical skills to implement a digitization workflow for existing paper records.
- Knowledge to select and deploy appropriate digital storage and access solutions.
- Competence to design a long-term digital preservation strategy for organizational records.

Organizational Impact

Organizations will benefit from:

- Improved efficiency and accessibility of document and data management.
- Enhanced security, compliance, and risk mitigation for digital records.
- Sustainable digital preservation practices to protect critical information over time.
- Teams capable of managing and optimizing electronic archives across the organization.

Training Methodology

- Interactive lectures and scenario-based exercises
- Hands-on workshops for digitization, metadata creation, and storage solutions
- Case studies illustrating successful electronic document management transitions
- Practical exercises in long-term digital preservation planning



Beyond the Course

By the end of this 1-week program, participants will be ready to:

- Lead the transition from paper-based to digital document systems in their organization.
- Implement efficient workflows for digitization, metadata management, and storage.
- Ensure secure, compliant, and sustainable preservation of electronic records.
- Optimize access and retrieval of digital archives for improved organizational performance.

