

**British Columbia Ministry of Management Services**  
**Security & Privacy Conference 2005**  
*Synergies in an e-Society*

# **Managing Electronic Records**

## **WORKSHOP**

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**IM Systems and Standards**

**Corporate Records Management Branch**

**Strategic Planning and Policy**

Office of the Chief Information Officer

British Columbia Ministry of Management Services

# Workshop Overview

➔ E-Records Management Primer

➔ Q&A

*1:45-2pm Coffee Break*

➔ The BC E-Records Situation

➔ BC EDRM System Demonstration

➔ Q&A

*2:45-3pm Coffee Break*

➔ Digital Preservation Primer

➔ Participant Survey Results

➔ Q&A

# E-Records Management Primer

- ➔ E-Records Management Concepts
- ➔ Benefits of Records Management
- ➔ Enterprise Content Management
- ➔ E-Records Management Challenges
- ➔ Online Resources

# What is a record?

- ❖ “information created, received and maintained as evidence and information by an organization, person in pursuance of legal obligations or in the transaction of business.”
  - ❖ *ISO 15489-1:2001(E) Records Management*

# What is a record?

- ❖ Provides the required information to initiate, execute and complete business functions
- ❖ Serves as evidence that a business function or transaction was carried out for legal or accountability purposes
- ❖ Provides historical information about a business function and organizational activities for future reference and research

# What is an electronic record?

- ❖ Electronic records are records in digital form
- ❖ E-records include email, word processing and presentation documents, data in corporate information systems, intranet and public website content, etc..
- ❖ Content, context and structure

# E-Records Management and IT

- ❖ IT is used to create e-records
- ❖ IT enables e-records management
  - ❖ Enterprise Content Management
  - ❖ Storage management
  - ❖ Security management
- ❖ Electronic Records management is a sub-domain of Records Management, not a sub-domain of IT management

# What is Records Management?

“the field of management responsible for the efficient and systematic control of the creation, capture, preservation, use and disposition of records, including processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records.”

*ISO 15489-1:2001(E) Records Management*



# The Records Lifecycle

- ❖ 'current' or 'active' phase
  - ❖ a record is actively involved in the initiation, execution and completion of a business function
- ❖ 'semi-current' or semi-active phase,
  - ❖ the record is set aside in the event that information related to the business function is required for follow-up, monitoring or auditing.
  - ❖ Those records that are not deemed to have permanent value are destroyed at the end of this phase
- ❖ 'non-current' or 'inactive' or 'archival' phase
  - ❖ preserved as an archival record so that is available for future reference and research

# Records Management Processes

1. Capture records
2. Classify records
3. Store records
4. Access records
5. Track records
6. Destroy records
7. Preserve records

# Records Management Tools

- ❖ records capture guidelines
- ❖ record registers
- ❖ record metadata schema
- ❖ record profiles
- ❖ records classification scheme
- ❖ business activity taxonomy
- ❖ authorized terms and codes
- ❖ security and access classification schemes
- ❖ finding aids
- ❖ tracking mechanisms (versioning, check-in/out)
- ❖ records disposition authorities
- ❖ disposition action documentation
- ❖ storage plan
- ❖ disaster recovery plan
- ❖ digital preservation plan

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# Benefits of Records Management

1. Maintain complete and accurate documentation of organizational activities to protect the interests of the organization and the rights of employees, clients and stakeholders
2. Prevent information overload and the retention of irrelevant, outdated or duplicate information
3. Comply with applicable laws and regulations including privacy and financial reporting requirements
4. Support efficient, enterprise-wide information discovery and retrieval

# Benefits of Records Management

5. Manage the risks associated with the existence of or lack of evidence of organizational activity during litigation, audit or investigation
6. Support the administration, integration and development of the organization's I.T. infrastructure by establishing sound information practices, procedures and tools that are technology and system independent
7. Provide business continuity in the event of a disaster
8. Maintain and promote organizational memory and identity

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- ➔ Online Resources

# E-Records management hits the mainstream...

1. 'Compliance'
2. Growth and amalgamation of the Enterprise Content Management (ECM) Industry



# ECM 101

Enterprise Content Management: the technologies, tools, and methods used to capture, manage, store, preserve, and deliver content across an enterprise. At the most basic level, ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists.

## CAPTURE

How do you move content, paper or electronic, into your content repository for reuse, distribution, and storage?

Creation/Authoring	Technologies	
Office Documents	OCR	HCR
Forms	ICR	OMR
Rich Media	IDR	
Microfilm	Document Imaging	
ERP	Forms Processing	
E-Billing	E-Forms/Web Forms	
Financial Applications	Aggregation	
XML	COLD/ERM	

## MANAGE

What are the tools and techniques for moving content around an organization and monitoring those tools' performance?

## STORE

Where do you put your content and how do you find it again?



## DELIVER

How do you get the right content to the right audience on the right device?

Transformation Technologies	Security Technologies	Distribution
COLD/ERM	PKI	Paper
Personalization		Internet
XML	Digital Rights Management/Watermark	Extranet
PDF		Intranet
Compression	Digital Signatures	Portal
Syndication		Email
		Fax
		Mobile Devices
		E-Statements

## PRESERVE

What are your options for long-term archival and storage of your company's essential content?

ARCHIVE TYPES		
Paper	Film	Optical
NAS/SAN		CAS

# Enterprise Content Management (ECM): Technologies & Applications

- ❖ scanning and imaging
- ❖ forms management
- ❖ document management
- ❖ web-content management
- ❖ email archiving
- ❖ workflow and business process management
- ❖ records management
- ❖ collaboration tools
- ❖ compression and encryption
- ❖ digital signature systems
- ❖ data warehousing
- ❖ backup and archiving systems
- ❖ storage platform systems
- ❖ storage media solutions

# Records Management and ECM

- ❖ Is there a difference between ECM definition of records management and ISO 15489 definition?
- ❖ Is a 'record' the same as 'content' ?
- ❖ Is the ECM definition of 'preserve' the same as an archivist's definition of 'preserve'?

# E-Records Infrastructure

- ❖ Legal and policy framework
- ❖ Records Management resources and training
- ❖ Records Management tools and procedures
  - ❖ Classification schemes and retention schedules
  - ❖ Access and security policies
- ❖ Information and Communications Technology (ICT) standards
- ❖ *ECM/E-Record products and technologies*
- ❖ Records Management awareness and ownership

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# AIIM/ARMA E-Records Survey 2004

2200	respondents from business and government
93%	believe the process by which their electronic records are managed will be important in future litigation
47%	of the organizations have not scheduled their electronic records
59%	of the organizations do not have any formal e-mail retention policy
62%	are either “not at all confident” or only “slightly confident” that their organization could demonstrate that its electronic records were accurate, reliable and trustworthy over the long term

# AIIM/ARMA E-Records Survey 2004

- ❖ The expertise required to successfully manage electronic records exists in three professional areas – legal, IS/IT and records management
- ❖ These often operate as “silos” and do not communicate effectively with each other or with the records creators/users in the business areas
- ❖ The result is that most organizations have significant problems in how they manage their electronic records.

# E-Record Trends & Issues

- ❖ User buy-in: declare & classify
- ❖ Email capture & archiving
- ❖ Is auto-classification the silver bullet?
- ❖ Bringing RM to the user: desktop, file system, email client
- ❖ Bringing RM to structured-data, enterprise information systems



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- ➔ Online Resources


# www.arma.org/erecords

ARMA International: The Association for Information Management Professionals - Electronic Recor - Microsoft Internet Explorer

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Address <http://www.arma.org/erecords/index.cfm> Go Links



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## ARMA International's RIM e-Assessment

Find out if your records and information management program is putting your organization at risk.



### Electronic Records

It's estimated that more than 90% of the records being created today are electronic. Coupled with the overwhelming growth of electronic messages - most notably e-mail and instant messaging - the management of electronic records has become a critical business issue. How that information is managed has significant business, legal, and technology ramifications. Ultimately, it doesn't matter what medium is used to create, deliver, or store information when determining if content is a record and should be managed accordingly.

#### Electronic Discovery

Access resources related to electronic discovery, including Sedona Conference Working Group Series publications.

#### Publications

Browse the many publications (books, manuals, etc.) ARMA offers on the subject of electronic records.

#### Information Management Journal Articles

Download past articles on electronic records from *The Information Management Journal*.

#### Online Courses

Take an ARMA International online course on electronic records.

#### Audio / Video / Software

View offerings in audio, video, and software formats on electronic records.

#### Other Resources

See other resources (white papers, articles, downloads, etc.) on electronic records.

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### Mismanaged Records Can Have Disastrous Consequences.



### Upcoming Events

- February 3-7, 2005** /Online Web Seminar: E-mail Archiving, Retention, and Active Policy Management
- February 11, 2005** /Boston, MA Networking and Telecommunications for Archivists
- February 12, 2005** /Boston, MA Understanding Web Technologies
- February 28-2, 2005** /Tempe, AZ Preservation and Access for Digital College and University Resources (ECURE 2005)
- March 11, 2005** /St. Louis, MO Describing Archives: A Descriptive Standard (DACS)

Done Internet

The screenshot shows the AIIM E-DOC Magazine website in a Mozilla browser window. The browser title is "AIIM E-DOC Magazine - Enterprise Content Management at Work! - Mozilla". The address bar shows "http://www.edocmagazine.com/". The website features a blue and white color scheme with a navigation menu and a main content area.

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o Guidelines  
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**November/December 2004**  
**FEATURES**  
**Organizing Your SOX Drawer**  
**James R. Dukart**  
Records managers face new challenges and opportunities as a result of the Sarbanes-Oxley Act (SOX) - technology can help.  
**AIIM 2005 Buyers' Guide**  
**AIIM E-DOC Magazine**  
Your entry into the Enterprise Content Management Solution Provider Community.  
**Potato, Potahto**  
**J. Timothy Sprehe**  
The differences between electronic document management systems and electronic records management systems are not merely semantic.  
**Memo to CIOs: Don't Forget the Business Case for Compliance**  
**Harald Collet**  
**Do Not Pass Go**  
**Bud Porter-Roth**  
Is RM your get out of jail free card or is there more value to RM than that?  
**Foresight 2035**  
**Thornton A. May**  
**Leading Thoughts From AIIM's Leading Lights**  
**EmTAG**  
Recently, the members of EmTAG collaborated to identify the ...

**AIIM Webinars**  
**I'm from ECM. You're from BPM.**  
Produced By: AIIM & The Process Factory  
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Date: 02/23/2005 2:00-3:00 P.M. EST  
**How Dynamic Data Capture Improves Your Business Processes**  
Produced By: AIIM & IMERGE Consulting  
Date: 03/16/2005 2:00-3:00 P.M. EST  
**Past Webinars**  
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**Document Imaging ROI**  
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In today's, or any, economic climate, the ability to show a solid return on investment for any technology investment is a giant step in moving the project forward. Read on to understand ROI for one piece of the enterprise content management puzzle, Document Imaging.  
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**Don Scott**  
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Is it just me or has our industry gone mad on compliance?  
**Winning with Electronic Records Management**  
**Lori Ashley, Bryant Duhon, and Robert F. Williams**  
How to Stay Ahead of the Records Race -- Download the PDF of AIIM's new wall poster.  
**DAM Interesting**  
**Bryant Duhon**  
Digital Asset Management (DAM) is making inroads into new applications -- particularly marketing departments -- from its historical roots in media and entertainment. A brief conversation with Kieron Osmotherly, director of a UK-based DAM event company.  
**ECM Design: Don't throw the baby out with the bath water...**  
**George Parapadakis**  
Imagine it's November 2008. The super-efficient ECM solution that you built four years ago looks positively antiquated and is held together with rubber bands. Yet, the data it contains is critical to your business and will continue to be so for the foreseeable future. How can you upgrade your system without compromising your information? And, more importantly, what can you do today to prepare for the inevitable?

The screenshot shows a Microsoft Internet Explorer browser window displaying the Corporate Records Management Branch website. The address bar shows the URL <http://www.msers.gov.bc.ca/crmb/>. The page features a purple header with the text "Corporate Records Management Branch" and "Ministry of Management Services". The main content is organized into several sections:

- Key Initiatives:** Includes links for [ARCS Online](#), [Electronic Information Management](#), [Policy & Standards](#), [RIM Manual](#), [Policy and Procedures](#), [Standard ORCS Kit - 2001](#), and [General IM/IT Management Policies](#).
- What's New:** Includes a link for [ARCS Update](#).
- Other Links:** Includes links for [CRO/MRO list](#), [CIO](#), [BC Archives](#), and [Information Policy and Privacy Branch](#).
- Feedback:** A section with the text "We welcome your [comments and suggestions](#) about this web site."

The **Overview** section contains the following text:

The Corporate Records Management Branch provides central [information management](#) services and support to ministries, Crown corporations and agencies within the government of British Columbia. The effective management of information enables government to support decision-making, reduce costs, meet business, legal and accountability requirements and preserve British Columbia's documentary heritage.

Corporate Records Management Branch provides a government-wide framework for the management of all recorded information (i.e., all [records](#) as defined in section 29 of the Interpretation Act). The Branch administers the provisions of the [Document Disposal Act](#), and establishes corporate standards for the creation, security, accessibility, retention, disposition and preservation of records (see [Core Policy Manual Chapter 12](#) and [Recorded Information Management Manual](#)).

Specifically, the Corporate Records Management Branch is responsible for:

- providing central direction and control for government information and records management programs/activities;
- maintaining the government standard records classification and scheduling tools: [Administrative Records Classification System \(ARCS\)](#) and ministry-specific Operational Records Classification Systems (ORCS);
- appraising government information holdings to identify and preserve records with ongoing value for the government archives;
- providing cost-effective storage, retrieval and disposal services for ministries' semi-active and inactive records;
- advising and assisting ministries to apply effective information management to records in all media and formats, including electronic;
- making recommendations to the Procurement Governance Office on the feasibility and economy of micrographic and other imaging systems;
- providing imaging and micrographic technology services;
- leading implementation of [Enterprise Document and Records Management System \(EDRMS\)](#) for government; and
- participating in government-wide [information management committees](#) (i.e., MROC, IMFC, PDC).

The footer of the page includes links for [Top](#), [Copyright](#), [Disclaimer](#), [Privacy](#), and [Feedback](#).

# Workshop Overview

➔ E-Records Management Primer

➔ Q&A

*1:45-2pm Coffee Break*

➔ The BC E-Records Situation

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*2:45-3pm Coffee Break*

➔ Digital Preservation Primer

➔ Participant Survey Results

➔ Q&A

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➔ Digital Preservation Primer

➔ Participant Survey Results

➔ Q&A

# Digital Preservation Primer

1. The Digital Preservation Problem

2. Digital Preservation Solutions

3. Digital Preservation Initiatives

4. Online Resources

# Digital information will never survive by accident

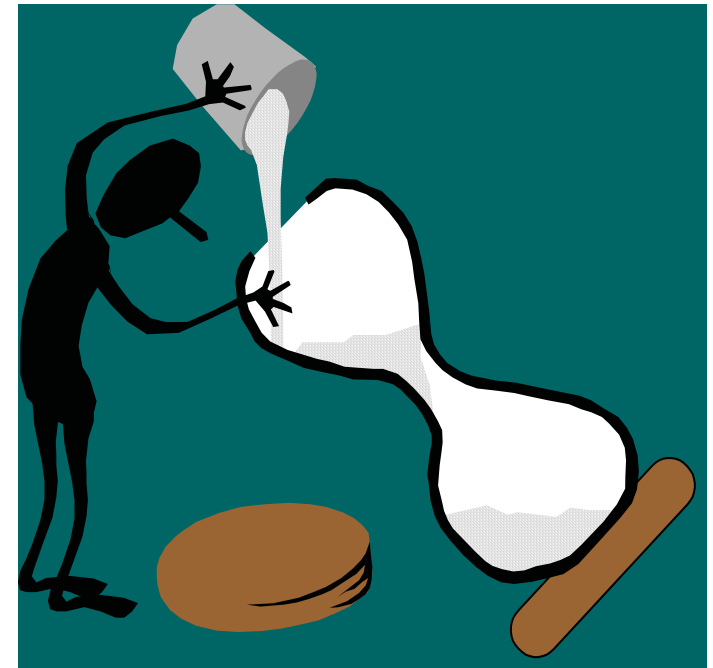
A serious gap exists between:

1. the volume and variety of digital information that is being created, and
2. the mistaken assumption that these electronic records and digital assets will automatically be managed and preserved over time



# Many e-records are needed long-term

- ❖ Beyond the lifespan of the current system
- ❖ Information/records are needed long-term for a variety of reasons, including:
  - ❖ Operational value
  - ❖ Auditing
  - ❖ Legal and regulatory compliance
  - ❖ Historical value



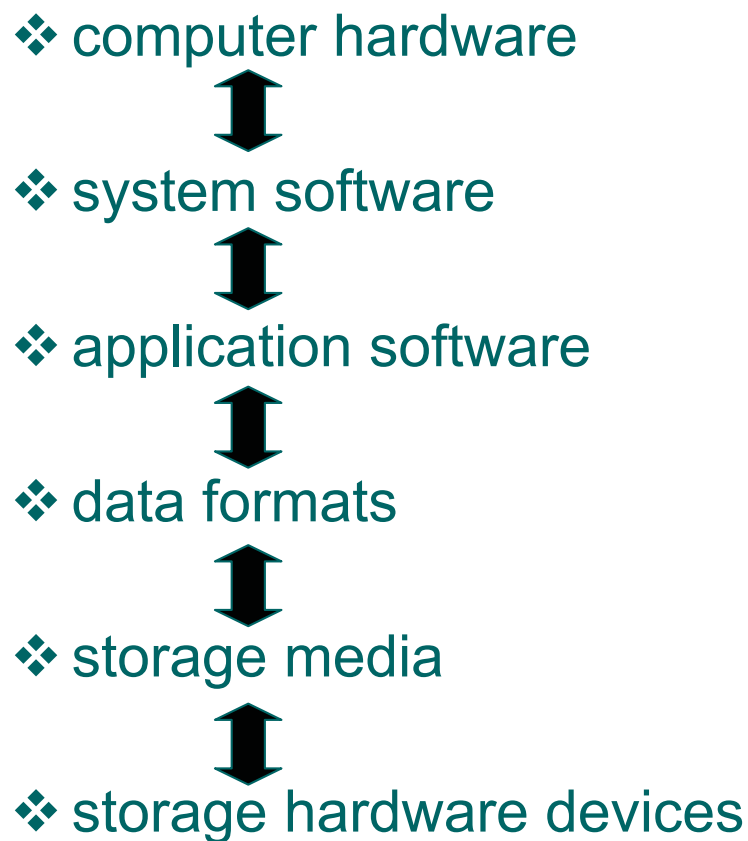
# When dealing with digital information, how long is 'long-term'?

“A period of time which is long enough to be concerned about the impacts of changing technologies, including support for new media and data formats, and with a changing user community, on the information being held in a repository. This period extends into the indefinite future.”

❖ *ISO-STD 14721: Open Archival Information System*

# The Digital Preservation Problem

## 1. Technology obsolescence and incompatibility



# The Digital Preservation Problem

## 2. Physical instability and deterioration of digital storage media

- ❖ Magnetic hard disk
- ❖ Magnetic tape
- ❖ Optical (CD/DVD)
- ❖ Flash/Solid State
- ❖ Holographic
- ❖ no digital media is permanent (compare to durability of paper or clay tablets)

# The Digital Preservation Problem

## 3. Lack of adequate metadata

- ❖ failure to locate specific information due to lack of descriptive information
- ❖ inability to render and read the information due to lack of technical information
- ❖ inability to attribute meaning or value to the information due to the lack of contextual information
- ❖ inability to verify authenticity of information

# Beware the Digital Dark Ages!

- ❖ Ongoing, active management and strategic planning is required
  - ❖ Accountability, responsibility, resources
- ❖ Organizations will lose critical and valuable digital information if they fail to plan ahead

# Digital Preservation Primer

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# Technology alone will not solve the digital preservation problem

- ❖ Storage Media and Storage Management technologies
- ❖ Enterprise Content Management industry
- ❖ Application-software 'archiving' functionality



# Open-Source Solutions

- ❖ Storage Resource Broker ([www.npaci.edu/DICE/SRB/](http://www.npaci.edu/DICE/SRB/))
- ❖ Dspace ([www.dspace.org](http://www.dspace.org))
- ❖ Jhove ([hul.harvard.edu/jhove/](http://hul.harvard.edu/jhove/))
- ❖ i-TOR ([www.i-tor.org/en/](http://www.i-tor.org/en/))
- ❖ KnowledgeTree ([kt-dms.sourceforge.net/](http://kt-dms.sourceforge.net/))
- ❖ Heritrix ([crawler.archive.org/](http://crawler.archive.org/))
- ❖ Xena ([xena.sourceforge.net/](http://xena.sourceforge.net/))

# Open-Source Solutions

- ❖ Open-source solutions are relatively immature
- ❖ Open-source does not necessarily mean free:
  - ❖ Open-source has hidden implementation and maintenance costs
- ❖ Open-source solutions will increasingly be supported by private sector vendors
- ❖ Open-source does not mean open-standard compliance

# Both vendor and open-source solutions must support:

## 1. Open technology and interoperability standards

- ❖ WebDAV
- ❖ JSR170
- ❖ XML
- ❖ SOAP
- ❖ SMI-S
- ❖ Etc.

# Both vendor and open-source solutions must support:

## 2. Open file formats

- ❖ PDF/Archival (ISO 19005-1)
- ❖ PNG, TIFF, JPEG2000
- ❖ WAV or MPEG-1 layer 3 (MP3)
- ❖ MPEG2
- ❖ Etc.

# Both vendor and open-source solutions must support:

## 3. Open metadata schemas and management tools

- ❖ Dublin Core Metadata Initiative
  - ❖ Metadata Encoding and Transmission Standard (METS)
  - ❖ Preservation Metadata: Implementation Strategies (PREMIS)
  - ❖ NISO Z39.87 Technical Metadata for Still Images
  - ❖ Archival Standards for Description (ISAD(G), RAD)
  - ❖ ISO standard 23081 – Metadata for Records
- 
- ❖ Would you like that Wrapped, Linked or Embedded?
    - ❖ Adobe Extensible Metadata Platform (XMP)

# Beyond Vendors and Technology

- ❖ Vendor and/or technology specific solutions are susceptible to the cycles and volatility of the IT industry
  - ❖ digital preservation solutions must provide permanence and consistency
- ❖ Business, user and compliance requirements will evolve over time
  - ❖ These must be mapped to the evolving technology layer:
    - ❖ requirements management, enterprise architecture
  - ❖ These moving targets must be managed

# Beyond Vendors and Technology

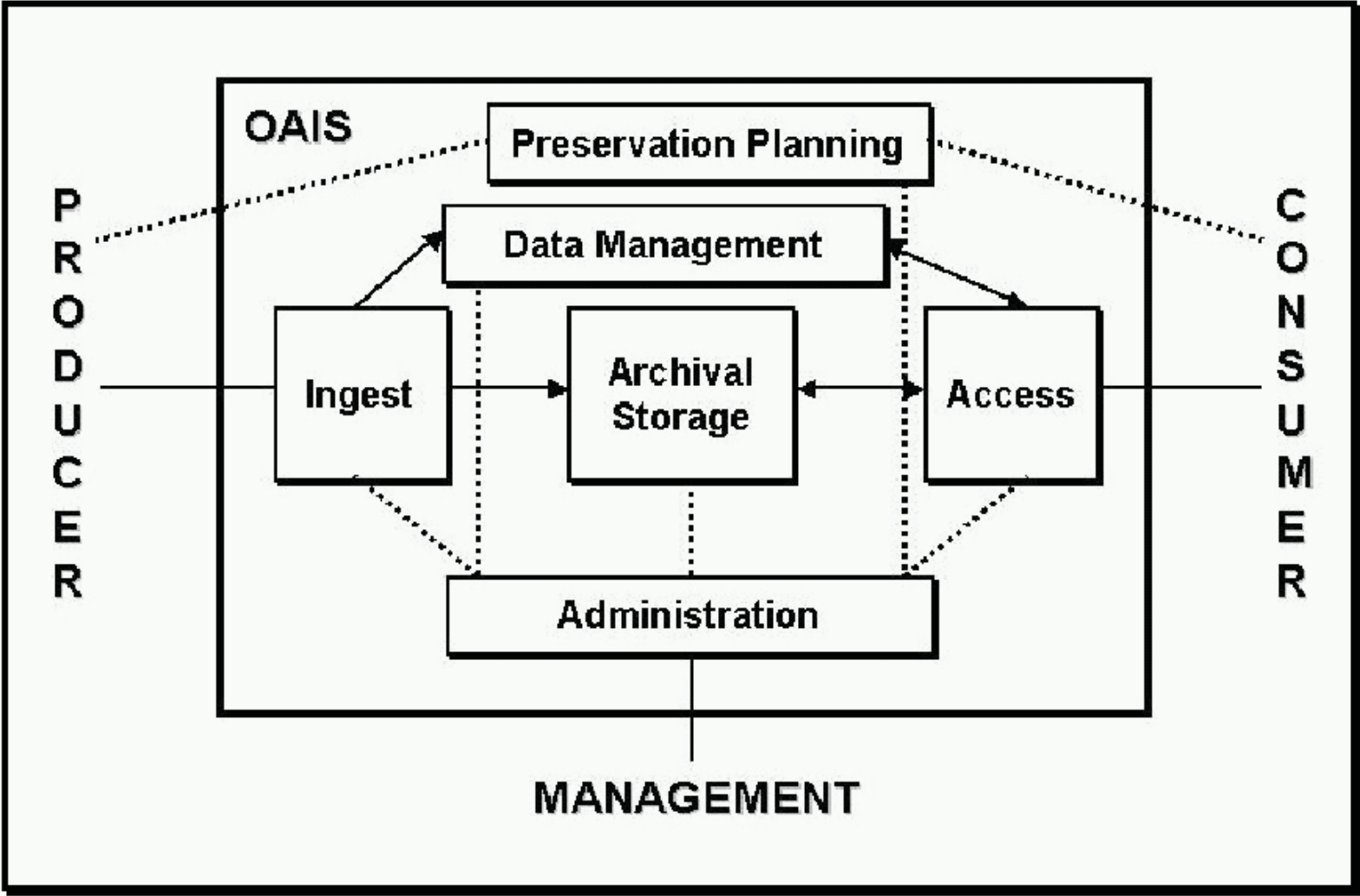
- ❖ no single vendor and/or technology currently provides comprehensive solutions which fully address all of the preservation problem areas across the technological layers
- ❖ vendors and technology cannot address critical organizational issues such as:
  - ❖ ownership, responsibilities, regulatory environment, policies, procedures, capacity, resources, funding, collaboration

# Reference Model for an *Open Archival Information System (OAIS)*

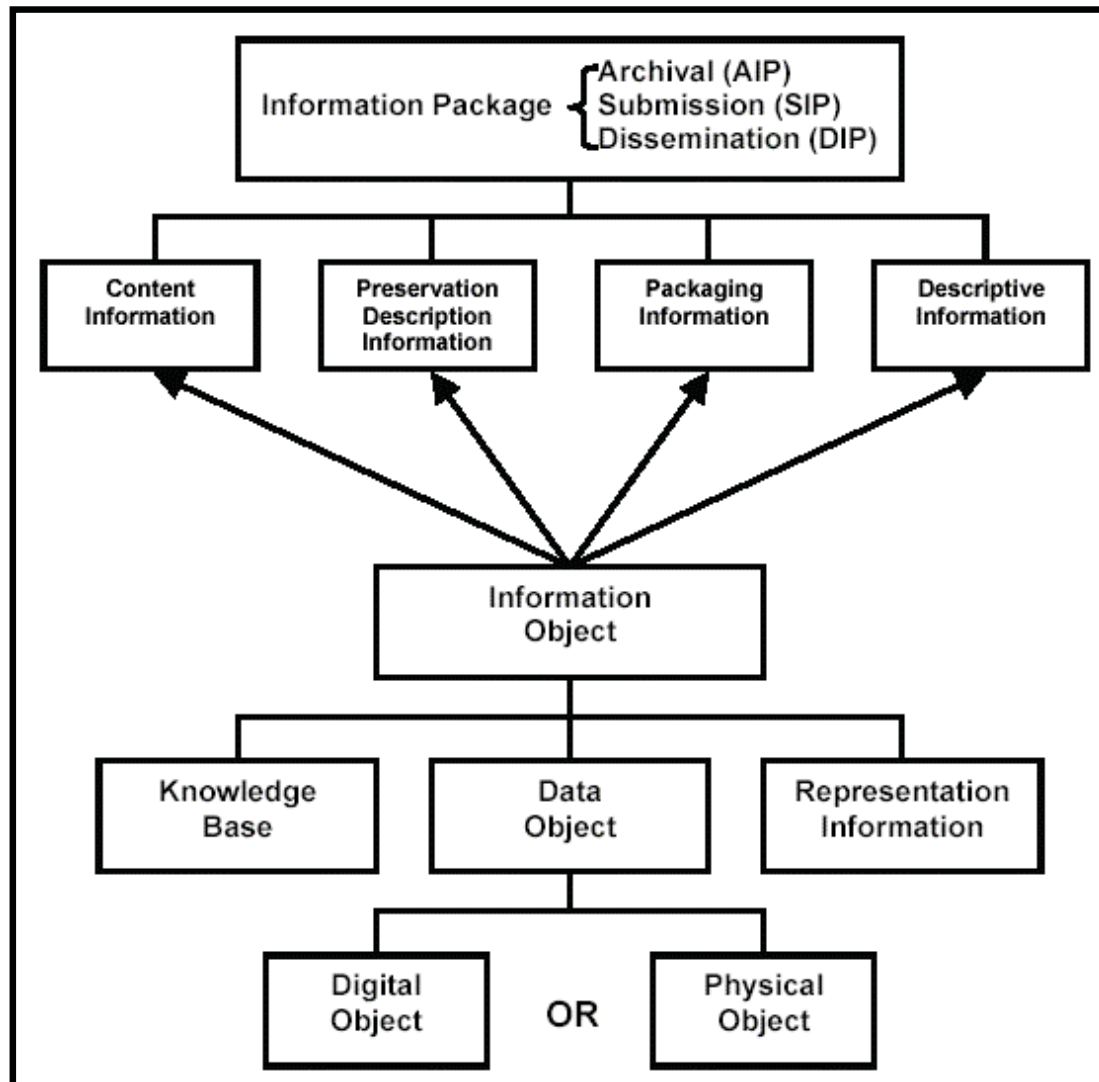
- ❖ international ISO standard 14721 (January 2002)
- ❖ comprehensive logical model describing all of the functions of a digital archives
- ❖ *archival information system*: “an organization of people and systems that has accepted the responsibility to preserve information and make it available for a Designated Community.”
- ❖ Does not specify technologies or archiving techniques



# OAIS Functional Model



# OAIS Information Model



# Digital Preservation Technical Strategies

- ❖ System life support – maintain legacy data and legacy software/hardware indefinitely
- ❖ Emulation – maintain legacy data and access with new software/hardware that emulates the original application environment
- ❖ Migration - Stage 1 - migrate all data to new operational system
  - ❖ Maintain archival information indefinitely in the ‘live system’
- ❖ Migration – Stage 2 - migrate data/information requiring long-term preservation to open archive formats and into purpose-built digital archives

# Digital Preservation Primer

1. The Digital Preservation Problem
2. Digital Preservation Solutions
3. Digital Preservation Initiatives
4. Online Resources

# Noteworthy Institutional Projects

- ❖ United States National Archives and Records Service (NARA)
  - ❖ Electronic Records Archive (ERA) project
- ❖ United Kingdom National Archives
  - ❖ Digital Archives
  - ❖ Central Government Websites Archive
  - ❖ PRONOM database
- ❖ Public Records Office of Victoria (Australia)
  - ❖ VERS Digital Archive
- ❖ Washington State Archives
  - ❖ Digital Archives

# Noteworthy Collaborations

- ❖ U.S. National Digital Information and Infrastructure Preservation Program (NDIIPP)
  - ❖ [www.digitalpreservation.org](http://www.digitalpreservation.org)
- ❖ U.K. Digital Preservation Coalition (DPC)
  - ❖ [www.dpconline.org](http://www.dpconline.org)
- ❖ International Internet Preservation Consortium (NIPC)
  - ❖ [netpreserve.org](http://netpreserve.org)
- ❖ InterPARES Project
  - ❖ [www.interpares.org](http://www.interpares.org)

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Digital Preservation Tutorial: Table of Contents - Mozilla

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## Digital Preservation Management:

Implementing Short-term Strategies for Long-term Problems



Next >>

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- Table of Contents
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**WINNER!** This tutorial is the proud recipient of the 2004 SAA Preservation Publication Award.



**Introduction**

1. Setting the Stage
2. Terms & Concepts
3. Obsolescence
4. Foundations
5. Challenges
6. Program Elements

**Additional Reading**



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Support for this tutorial comes from the **National Endowment for the Humanities**. Version 1.0



Webmaster  
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# [www.nla.gov.au/padi](http://www.nla.gov.au/padi)

The screenshot shows a Mozilla browser window displaying the PADI website. The browser's address bar shows the URL <http://www.nla.gov.au/padi/>. The website header features the National Library of Australia logo and the PADI title "Preserving Access to Digital Information". A navigation sidebar on the left includes links for Home, About PADI, Search, Browse Topics, Feedback, Contributions, What's New?, Partners, and Working Groups. The main content area is titled "PADI is a subject gateway to international digital preservation resources". It features a "PADI TRAILS" button with a "NEW" tag and a promotional message: "Don't know where to start? Try the new PADI Trails." Below this are two columns of resource types and digital preservation topics, each with a list of items and a "NEW" tag next to "Web Archiving". At the bottom, there are sections for "Safekeeping" and "PADIUpdate", and logos for the Council on Library and Information Resources (CLIR), the Digital Preservation Coalition (DPC), and ERPANET.

**PADI - Preserving Access to Digital Information - Mozilla**

File Edit View Go Bookmarks Tools Window Help

Back Forward Reload Stop <http://www.nla.gov.au/padi/> Search Print

**NATIONAL LIBRARY OF AUSTRALIA**

**PADI** Preserving Access to Digital Information

PADI is a subject gateway to international digital preservation resources

**PADI TRAILS** *Don't know where to start? Try the new PADI Trails.* **NEW**

**RESOURCE TYPES**

- ▶ Events
- ▶ Policies, Strategies & Guidelines
- ▶ Projects
- ▶ Organisations & Websites
- ▶ Bibliographies
- ▶ Discussion Lists
- ▶ Glossaries
- ▶ Journals & Newsletters
- ▶ News & Discussion
  - ▶ **padiforum-l**
  - ▶ Quarterly Digest
  - ▶ Current issue

**DIGITAL PRESERVATION TOPICS**

- ▶ Data Documentation & Standards
- ▶ Digital Libraries
- ▶ Digital Records
- ▶ Digitisation
- ▶ Formats & Media
- ▶ General Resources
- ▶ Issues
- ▶ Management
- ▶ National Approaches
- ▶ Rights Management
- ▶ Strategies
- ▶ Web Archiving **NEW**

▶ **Safekeeping**  
Selected resources in PADI are safekept

▶ **PADIUpdate**  
Use PADIUpdate to add resources

PADI is managed by the National Library of Australia with the support of [CLIR](#), [DPC](#) and [ERPANET](#)

Council on Library and Information Resources   Digital Preservation Coalition 

# Workshop Overview

➔ E-Records Management Primer

➔ Q&A

*1:45-2pm Coffee Break*

➔ The BC E-Records Situation

➔ BC EDRM System Demonstration

➔ Q&A

*2:45-3pm Coffee Break*

➔ Digital Preservation Primer

➔ Participant Survey Results

➔ Q&A

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