Training Course

Managing Electronic Records

The course has been designed to provide practical training and guidance to those responsible for the management of electronic records, including:

- the management of records in regulated business systems (such as electronic
- trial master files and SharePoint sites);
- the management of record life-cycles, including record creation and
- templates; and
- the management of electronic archives.

The course covers all aspects of managing electronic records and the specific regulatory requirements that apply in this area.

09:30   **Welcome and Introductions**

09:45   **Regulatory and Legal Requirements**
An examination of the current GxP regulations, guidance documents and legislation as they apply to the management and retention of electronic records. Reference will be made primarily to UK and EU regulations and legislation but other requirements will also be included.

10:30   **Coffee**

10:45   **File formats and Storage Media**
This session will look at the variety of electronic file formats typically used to create and retain information and their impact on the records life-cycle and records management practices. The presentation will also consider different storage media for these records and how this impacts the records manager or archivist.

11:15   **Electronic Record-keeping Tools**
A wide variety of electronic tools can be used to create, distribute, manage and store electronic records. This session will review the key differences and will help delegates to understand the requirements that need to be complied with for efficient and acceptable records management practice.

11:45   **Electronic Mail**
This session provides an overview of some of the challenges in managing electronic mail within organisations. It will provide a number of options that can be implemented to improve practices.

12:30   **Lunch**

13:15   **Electronic Signatures**
There is often much misunderstanding about different forms of electronic signatures and how these compare with traditional wet-ink signatures, particularly from a legal and regulatory perspective. This session will dispel some of the myths and provide clarity regarding what is and what isn't acceptable in a regulated environment.

14:00   **Digital Preservation – Introduction**
This session builds on previous sessions to explain exactly what "digital preservation" means, why it is important to mitigate the effect of obsolescence, data loss and other risks, and an overview of the OAIS reference model for long term record preservation.

14:45   **Tea**

15:00   **Digital Preservation Strategies**
This session provides an implementation approach and model for digital preservation. The presentation highlights the key components of a preservation strategy, including roles and responsibilities.

16:00   **Archive Solutions**
There are many commercial organisations that claim to offer an "archive solution" for electronic records. This session will review the different types of solution and provide an appraisal of the advantages and disadvantages of each type of solution.

16:30   **Close of course**