

# Electronic Archiving Control for Office Managers Training Course

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# Electronic Archiving Control for Office Managers Training Course

## Course Overview

Electronic Archiving Control for Office Managers Training Course is a one-week course for office managers, administration supervisors, records coordinators, and document controllers who leave with an Electronic Archiving Control Plan. Participants connect archive scope, classification, indexing, metadata, naming, access, retention, retrieval, version control, audit trails, disposal, and quality checks through office-based cases. The course turns shared-drive collections into controlled and searchable electronic archives. Electronic archiving control for office managers is taught by Agile Leaders Training Center.

## Who Should Attend

- Office management functions responsible for electronic filing standards and archive oversight
- Administration supervision functions responsible for document quality, access, and retrieval
- Records coordination functions responsible for classification, indexing, and retention actions
- Document control functions responsible for versions, audit trails, and controlled disposal
- Business support functions responsible for shared-drive and departmental archive controls

The course assumes participants already handle electronic documents and leaves out system backup, disaster recovery, cybersecurity engineering, and enterprise records-program design.

## Departments and Industries

The course supports electronic archiving in administrative and operational functions across multiple sectors.

- Administration, records, and document control
- Healthcare, education, and public-service organizations
- Banking, insurance, and professional services
- Manufacturing, engineering, and construction support
- Legal, procurement, human resources, and finance functions

## Learning Objectives

By the end of this course, participants will be able to:

- Analyze archive scope, document types, and control risks
- Build classification, indexing, and metadata structures
- Apply naming, version, access, and retention controls
- Use retrieval, audit-trail, and disposal procedures
- Evaluate archive quality and control evidence

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- Build an Electronic Archiving Control Plan

## Course Agenda

## Day 1: Electronic Archive Scope and Structure

- Electronic Archive Scope Map
- Document Type and Value Inventory
- Archive Risk and Control Assessment
- Electronic Folder Architecture
- Archive Ownership and Responsibility Matrix

## Day 2: Classification, Indexing, and Metadata

- Document Classification Scheme
- Electronic Indexing Structure
- Metadata Field and Value Dictionary
- File Naming Convention
- Search and Retrieval Test Script

## Day 3: Access, Versions, and Retention

- Archive Access Rights Matrix
- Version Status and Approval Protocol
- Retention and Disposition Schedule
- Legal Hold and Disposal Stop Register
- Archive Change and Migration Log

## Day 4: Retrieval, Audit Trails, and Quality

- Document Retrieval Request Workflow
- Archive Activity and Audit-Trail Review
- Duplicate and Obsolete File Control
- Archive Quality Sampling Checklist
- Archive Exception and Corrective Action Log

## Day 5: Electronic Archiving Control Practice

- Scope and Folder Structure Exercise
- Classification and Metadata Design Exercise
- Access, Version, and Retention Simulation
- Retrieval and Quality Review Exercise
- Capstone Electronic Archiving Control Plan

## Practical Exercises

The course uses suggested activities based on departmental electronic archives and document retrieval needs.

- Suggested activity: restructure an unorganized shared drive into a controlled folder architecture
- Suggested activity: create metadata and indexing rules for procurement and finance documents
- Suggested activity: resolve conflicting versions and access rights in a project archive
- Suggested activity: sample an archive for missing metadata, duplicates, and disposal exceptions

## FAQs

### Who does the Electronic Archiving Control for Office Managers Training Course suit?

The course suits office and records professionals who already handle electronic documents and need practical controls for classification, retrieval, access, retention, versions, and quality.

### How does electronic archiving control differ from records lifecycle management?

Electronic archiving control concentrates on organizing, protecting, finding, reviewing, and disposing of files within a departmental archive, while records lifecycle management governs records from creation through final disposition across the enterprise.

### What is an Electronic Archiving Control Plan?

An Electronic Archiving Control Plan defines archive scope, folders, classification, metadata, naming, access, versions, retention, retrieval, audit trails, disposal, quality checks, ownership, and corrective actions.

### What metadata should an electronic archive capture?

An electronic archive should capture the document type, reference, title, owner, business function, status, version, creation or receipt date, access class, retention rule, and disposal status required by organizational policy.

### How should electronic archive quality be checked?

Electronic archive quality should be checked through sampling for correct classification, required metadata, readable files, authorized access, current versions, retrievability, retention status, duplicates, and documented exceptions.

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## Conclusion

Participants take back an Electronic Archiving Control Plan linking archive structure, metadata, access, versions, retention, retrieval, audit trails, disposal, and quality. The plan creates a controlled method for maintaining departmental electronic files. It helps office teams find reliable documents, prevent uncontrolled copies, protect access, and demonstrate archive-control evidence.

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