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## 2 day PDF/Archive Training Class

- Learn PDF/A and how it can help your organization to preserve its electronic documents

### Introduction

The PDF/Archive Training Program is designed to introduce the PDF/Archive (PDF/A ) standard ISO 19005-1, *Document management – Electronic document file format for long-term preservation – Part 1: Use of PDF 1.4 (PDF/A-1)* and to help organizations to better preserve their electronic knowledge. The program covers the file format used for long-term preservation of electronic documents. It provides you with guidance as to how to make the best use of this file format.

AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organizations to capture, manage, store, preserve and deliver information to support business processes. We have existed for more then 60 years, and we are a not-for-profit organization.

### Course Development

The course objectives and content is defined by AIIM and reviewed by a select group of members of the PDF/A US committee responsible for the initial development of ISO 19005-1.

### Course Description

The PDF/A training program provides you with a solid understanding of PDF/A and the standard ISO 19005-1, *Document management – File format for the long-term preservation of electronic document – Part 1: Use of PDF 1.4 (PDF/A-1)*. The course will cover the technologies and best practices that help you to implement PDF/A in your organization so that you can preserve your electronic documents. You will learn concepts such as archiving, preservation, Electronic Records Management, workflow, metadata and document structure.

1100 wayne avenue, suite 1100, silver spring, md 20910

**t** 301.587.8202    **f** 301.587.2711    **w** [www.aiim.org](http://www.aiim.org)

## **Course Objectives:**

Archiving or Long-term Preservation (What is PDF/A?)

- *Consider what PDF/Archive is*
- *Understand the preservation problem*
- *Discuss what is meant by the electronic document explosion*
- *Decide the appropriate preservation file format for your organization*
- *Identify your organization's electronic documents that should be preserved*
- *Understand the difference between backup and preservation*
- *Consider the importance of a good Electronic Records Management program*
- *Identify features in PDF/A products that are needed to fulfill requirements*
- *Decide upon relevant storage models including audit trail and storage technologies*
- *Review digital preservation techniques*
- *Review necessary metadata and indexing*
- *Explain the concepts of classification and different approaches depending on local business needs*
- *Cover search and retrieval*
- *Understand the impact of Legislation, Standards and Regulation*

## **Who should attend AIIM's PDF/A Class?**

The PDF/A Class is designed for Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, etc, as well as for solution providers, sales consultants, project managers, and technical staff who are involved in preserving their organization's electronic documents.

## **Audiences**

- Regulatory (audit, CPA, financial, governmental)
- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Users

## **Course Material**

You will receive a Workbook and access to supporting online courses and exam.

## **Course Agenda**

Day 1 – Basics

- Preservation
- Introduction to standards
- Digital Document Explosion
- Preservation Problem
  - Business Case
  - Why we preserve documents
  - Overview of file formats
- PDF/A Introduction
- Overview of ERM
- Principles of Records Management relating to preservation
- Identifying documents to preserve
- Overview of conformance levels
- Selecting the appropriate storage medium
- Metadata for preservation
- Workflow and migration for long-term preservation

## Day 2 – Documents, Objects and Implementation

- Restricted functions
- Digital Signatures in preservation
- Fonts/text
- Color in PDF/A documents
- JPEG in PDF/A documents
- Images
- Conformance levels and issues
- Creating PDF/A documents from digitally born documents
- Scanning to PDF/A (converting images to PDF/A)
- Validating PDF/A files
- Implementation best practices
- Selecting PDF/A products
- Relevance of other PDF standards to PDF/A
- Legal and compliance implications of PDF/A

### **Who is the Course Instructor?**

The PDF/A course will be lead by Betsy Fanning, Director, Standards. As director of standards, Ms. Fanning is responsible for the standards and technical reports produced by AIIM as ANSI (American National Standards), ISO, and AIIM Recommended Practices as well Best Practices and AIIM's Membership and Chapters. At the international level, she is the secretary for ISO TC 171, Document Management Applications and ISO TC 171 Subcommittee 2, Application Issues and is the administrator for the U. S. Technical Advisory Group to TC 171 that represents the United States at the international meetings. She is also responsible for building liaison relationships with other standards development organizations. She is a member of a number of ANSI committees, ARMA and the Workflow Management Coalition.

### **Summary**

Private and Public Class Training:

- PDF/A Class, 2-days, 9:00 AM – 5:00 PM with a maximum of 15 attendees.
- Includes access to PDF/A web modules for 6 months after attending the class.
- Includes 3 opportunities to take and pass the AIIM PDF/A web exam.
- Includes English language delivery and all training materials.

Private Class Price:

- Price per day is USD 3500 for one trainer with maximum 15 attendees.
- Your organization will also cover accommodation and travel from Washington DC.

Public Class Price:

- Price per student \$1050 (AIIM Member Price) or \$1160 (Non-AIIM Member Price).

Web-Based Training Price (available end of April 2008):

- Price per student AIIM Member Price for all modules \$600 or \$65/module or Non-AIIM Member Price for all modules \$750 or \$75/module.

Private Class Venue:

- Either onsite at your location, or offsite as arranged by your organization.

Public Class Venue:

- Arranged by AIIM. Details provided at time of registration.