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2 day PDF/Archive Training Class Outline

- 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 than 60 years, and we are a not-for-profit organization.

AIIM is an ANSI accredited standards development organization the originator and maintenance organization for the PDF/Archive, ISO 19005-1 standard at both the U.S. and International levels. On behalf of ANSI, AIIM is the secretariat for the ISO Technical Committee and working group responsible for the development of the standard at ISO.

Course Development

The course objectives and content were defined by AIIM and reviewed by a select group of members of the PDF/A U.S. 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.

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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. This will be accompanied by a handout that summarizes the key concepts, including references to authoritative publications and web resources:

- Bibliographic and web resource pointers
- Glossary – terminology relevant of PDF/Archive
- Product Listing – a summary of PDF/A vendor products

Course Agenda

Day 1 – Basics

- Introduction
- Digital Document Explosion
- Digital Preservation
- Electronic Records Management
- Introduction to standards
- The PDF/A Standard
- Preservation Problem
 - Business Case
 - Why we preserve documents
 - Overview of file formats
- Overview of conformance levels
- Metadata for preservation

Day 2 – 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

Summary

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.

Contact standards@aiim.org to check dates for in-house training classes.

Contact bfanning@aiim.org if you are interested in becoming an AIIM Training Partner for PDF/A Training. You will then be able to sell and deliver the PDF/Archive Training.