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Info-byte:
Guidelines for Managing and Preserving Digital Records

Guidelines — what are they?

An approach, a set of recommendations, instructions, requirements or a model which gives guidance on digital records management and preservation. Guidelines for managing digital records often refer to standards for particular methods, formats and descriptions. Guidelines on management and preservation of digital records are usually issued by national archives, international organisations and interest groups.

Guidelines — what do they cover?

➢ Records creation: e.g. the PRO's "Functional Requirements for Electronic Records Management"; functional requirements for document management systems.

➢ Records preservation: e.g. N. Beagrie, M. Jones, "Preservation Management of Digital Materials Workbook", 2000

➢ Records metadata: e.g. NEDLIB's "Metadata for long term-preservation"

➢ Transfer of records: e.g. the Swedish National Archives *Regulations and Recommendations concerning Delivery of Recordings from Automatic Data Processing to the National Archives* (RA-FS 1997:7)

➢ Digitisation: e.g. NARA's *Guidelines for Digitizing Archival Materials for Electronic Access*

Some things to look out for in guidelines

➢ The legal context

➢ The aspects of the record life-cycle covered

➢ The standards they refer to and how they are incorporated into the guidelines

➢ Is there a "How to use this" instruction?

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Further information

➢ DLM Forum "Guidelines on best practices for using electronic information" and "Survey on the Relationship between Public Administration and Archives Services concerning electronic records management in the EU Member States"

➢ International Council on Archives, Committee on Electronic Records, "Guide for Managing Electronic Records from an Archival Perspective"

➢ PRO's EROS Project

➢ The NOARK standard for Norwegian Recordkeeping System

➢ Danish National Archives "Electronic Filing"