

Digital Collection and Appraisal at HSBC

James Mortlock, Digital Archives Manager, HSBC

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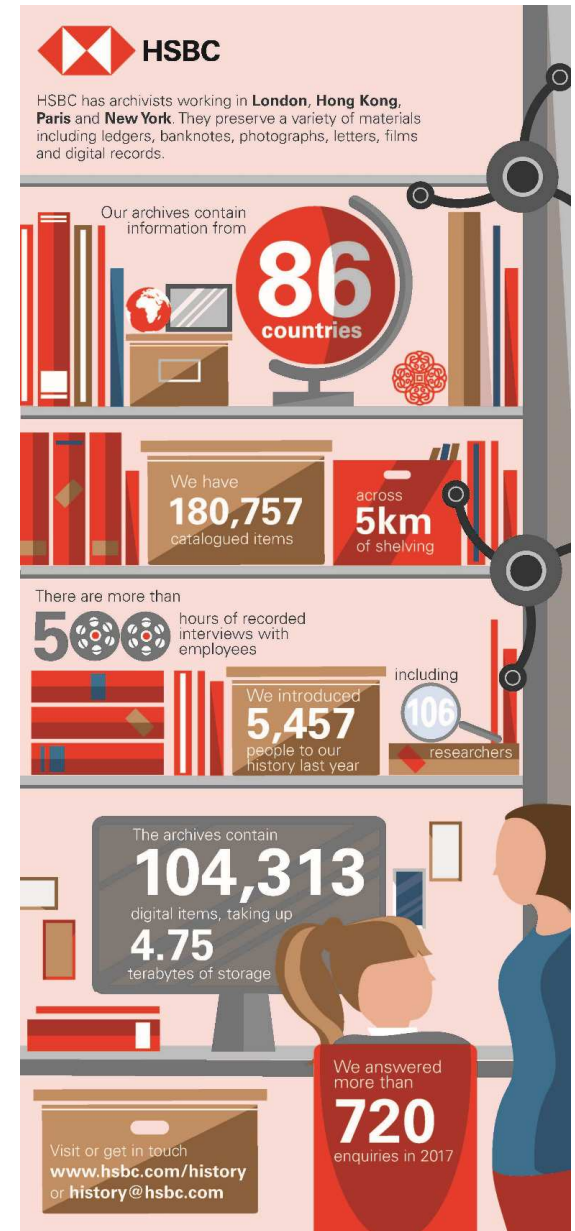


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HSBC Archives – a brief overview

- Digital Archives system in operation since 2015
- Active collecting programmes > encountering born-digital records on a day-to-day basis. Based on preserving the corporate memory of the business.
- Majority of collecting is now digital
 - No exceptional preservation challenges
 - Harvesting records from variety of sources (e.g. SharePoint sites, internal websites, NAS drives)
 - All archivists expected to process digital content, from collection to cataloguing
- Close collaboration with Records Management, IT, Information Security, Legal and Compliance
- Physical records still play a key role; strong focus on enhancement of descriptive and management metadata for both digital and physical records



Collecting unstructured data (i)

- Traditional archivist skills are still required
 - Organisational understanding
 - Personal collecting relationships
- Understanding and integrating with record creation and classification processes
 - Ensuring archival relationship exists with creating entities throughout active and semi-current use

Collecting unstructured data (ii)

- Legal and regulatory planning
 - Cross border record transfers
 - Information security and risk considerations
 - New collecting and transfer policies for specific record types need to be agreed upon
- Discovery tools in selection
- Duplicated collecting and the retention of contextual value

Processing unstructured data into a trusted digital repository (TDR)

- Moving towards post-ingest appraisal
 - Greater confidence in collecting
 - Increased processing ability
 - Top-level cataloguing and improved searching
 - Immediate and secure transfer (meeting depositor expectations)
 - Indexing and technical metadata profiling prior to appraisal
 - Maintaining trusted audit trail of digital deposits

Future challenges

- Improving TDR integration
- Automating selection
- Improved discovery tools
- Email selection
- More integration with other functions of our organisations/businesses

Thank you

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➤ history@hsbc.com

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