

# THE 150<sup>TH</sup> –YEAR WATERSHED – A SECURE DIGITAL REPOSITORY CREATED FOR STANDARD BANK HERITAGE CENTRE

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## **Abstract**

This concept paper provides a historical narrative of Standard Bank through the company's heritage centre. The study also provides background to the establishment of a secure digital repository at Standard Bank Heritage Centre. The narrative is based on the author's experience and involvement in the management of Standard Bank Heritage Centre over a period of years. It is concluded that while the journey from paper to digital environment proved successful so far at Standard Bank, the digital world remains problematic especially with regard to skills for preservation. To control the environment, the heritage centre relies on the IT technical experts to handle updates and general maintenance of digital systems while archivists only monitor from the operational side. It is recommended that archivists need to be IT literate in order to take control of digital records.

**Keywords:** digital repository, Standard Bank, archives, heritage

While the main focus of this article is the creation of the Standard Bank Heritage Centre's secure electronic repository and the watershed moment that necessitated the move from paper to digital archiving, it is necessary to also highlight the creation of its paper-based archives and the origin of its very distinctive paper-based collection.

Standard Bank is a well-established 155-year old organisation with a unique history amongst banks in South Africa. The idea for the establishment of a bank called Standard Bank germinated in Port Elizabeth amongst a group of Port Elizabeth businessmen in the late 1850s. They could not raise the necessary capital locally but the dream persisted and Standard Bank was eventually established in London on 13 October 1862. However, branch operations commenced in Port Elizabeth where the bank's first branch opened early in January 1863. The bank also immediately embarked on establishing a branch network.

The fact that the bank's operational sphere was so far away from the decision-making head office and communication at the time was restricted mainly to letter writing, created a fascinating group of records. The general managers in South Africa had to report in detail, on not only the performance, growth and expansion of the bank's business, but also on the economic, political and social conditions ruling in its operating environment. Created to assist the London head office in understanding conditions in the bank's operating environment to assist them to make informed decisions, this group today has wonderful secondary value from a research point of view.

In 1962 Standard Bank was due to celebrate its centenary and an author had been commissioned a few years earlier to write a book on the history of the Standard Bank. The bank's original records, which had remained well preserved over the years in the basements of its local head office buildings, at this stage in Cape Town, were made available to him, records of which the general manager's correspondence series with London office formed the nucleus.

Having brought all these fascinating, original records together, the question of their future preservation arose. The decision was taken in 1975 to establish an archives. The records were transferred to Johannesburg, where Standard Bank's head office was now situated, and space for the archives was allocated in the bank's high-rise head office building in Fox Street in the Johannesburg CBD. Being ordinary office space that was adapted for archival storage, the storage conditions were not ideal judging by archival standards, but

at least the bank now had an archives where its important records could be preserved in a single, centralised area. The archives was initially also not staffed by professional archivists.

The realisation that professional archivists had to be appointed to control the bank's archives, led to the appointment of two professional, trained archivists during the early 1980s. The archivists set about placing the archives on a professional footing and proper archival description and arrangement of the fonds were undertaken.

When the Standard Bank decided to relocate its entire head office from its high-rise building at 78 Fox Street to a proposed new head office site situated in Simmonds Street, also in the Johannesburg CBD, the creation of proper archival storage conditions formed part of the plan. The archivists were consulted regarding the requirements for optimum archival storage conditions and were included in the project team for the archives' proposed new premises.

The new premises were occupied early in 1990 and the archives now boasted state-of-the-art document stores with 24/7 temperature and humidity control and gas fire-fighting systems for its paper records. Constant monitoring of these conditions commenced to ensure that standards were maintained.

Being a corporate archives, now with optimum storage conditions, the archivists realised that the archives needed to be transformed from a purely historical archives into a value-add section for the bank to ensure that it remained up-to-date and increase its relevance to the bank. With the historical records, it could always assist with promotional, marketing and public relations projects, by providing information for presentations, assist with material for publications, etc. But, if it could secure the younger decision making records, the section would add so much more value. In the absence of a formal records management programme, the archivists set about to ensure that the decision making and other important records of the bank get earmarked for permanent preservation in the archives. Arrangements for regular/annual transfers were made with the divisions/departments in question which would ensure that the

archives remains relevant and up-to-date. More current records now made their way to the archives and help with legal, regulatory and other value-add services could now also be provided.

For the next decade the holdings of the archives remained mainly paper-based, even though computers have made their way into the office environment.

At the turn of the century, the archivists learnt that one of the departments from which it received annual transfers of records decided to go completely digital and that it would no longer be sending any paper copies. Arrangement were made to receive the records electronically in the shape of six-monthly snapshots – the archives' first official electronic, digital-born records.

As in the case of the storage of the original paper-based holdings of the archives – now called the Heritage Centre – storage conditions for these records were not ideal. Like all departments in the bank, the Heritage Centre was allocated space on a normal file-and-print server, shared with other departments. As other electronic records also slowly started making their way to the Heritage Centre and the Centre's own output continued to increase, constant shortages of electronic space were experienced. The archivists consistently had to apply for additional space and found it very difficult to convince the IT department that the Centre had special needs and could not just simply delete records to stay within their allocated space limitations.

With a lot of patience and constant explanations that the Centre actually received electronic records that had to be preserved and secured permanently, the penny slowly dropped, and members of the IT department started understanding that a unique solution was necessary. Liaison with IT commenced in around 2006-7 but the negotiations were fraught with problems and a workable solution just could not be found.

The watershed moment that finally kick-started the creation of the Centre's electronic records storage system came in 2012 – ironically

the year of another milestone in the bank's history – its 150<sup>th</sup> anniversary. The archivists were informed that the bank's board packs, which encompassed all its decision making committees, were going solely electronic. These records formed the most important fonds of the modern era and, up to this stage, paper copies of the packs were transferred annually, at the end of each calendar year.

This scenario provided the archivists with a much-needed bargaining tool with the IT department. The value of the board packs, being highly confidential, essential records of the bank, was clear. The IT department now realised the gravity of the situation and the negotiations intensified.

A workable, secure electronic storage system was finally created for the Centre, which went live towards the end of 2012. A dedicated server was allocated to the Heritage Centre where ample space was created to allow for the permanent storage of the Centre's electronic records. Many security features were implemented on the server to allow for the protection of confidential, current records and a system was created on the server allowing for upgrades and updates to prevent redundancy. The majority of the records in the electronic system are stored in PDF format, although negotiations for a move to PDF-A are ongoing. The exact description and arrangement process followed for the hard copy documents were carried through into the electronic repository. Only the Heritage Centre's staff have access to the archival records through a shared drive which can only be accessed from desktop computers in the Centre's office.

With consistent monitoring of the paper document stores, the same type of monitoring had to be applied to the electronic repository. The Heritage Centre's staff monitors the system from an operational point of view but have to depend on the IT team from a server-functionality point of view.

With the advent of a fully functional electronic document repository, the transfer of board packs became more frequent – quarterly rather than annually.

With the major function of the Heritage Centre remaining the provision of information and documentary evidence to the Standard Bank Group, the Centre had to ensure that the information in the electronic records remained accessible. The older paper records were often indexed by the creators while the archivists also created word finding aids for the newer records. A solution had to be found for the electronic records. The Inmagic/DB Text database retrieval system, implemented by the Centre in 1997 for the paper records, provided the answer. Through its import filter, the contents of electronic records can be imported into the database. A word-search can then be done for easy information retrieval.

While our journey from paper to electronic records proved successful so far, the digital world remains problematic. Whereas the archivist can be in full control of the monitoring of the paper stores and can call in the experts for problem solving when required. The same cannot be said about the digital repository. To control the environment, in our case on a dedicated server, one has to rely on the IT technical experts to handle updates and general maintenance of the server. The archivist can really only monitor from the operational side. Furthermore, who knows what the digital future holds? We can do our best to secure our electronic documents earmarked for permanent preservation with our best knowledge of the digital world today and keep abreast of new developments. However, the rapidly changing digital environment presents the archivist and the support IT team with huge challenges. This calls for skilling of archivists in IT too be able to be in control of digital environment affecting records.