

COURSE OUTLINE RECORDS MANAGEMENT

Course Description:

BE108. Records Management. 3 hours credit. This course will enable the student to understand the initiation and maintenance of a cost-effective information records management program, including creation, retrieval, retention, transfer and disposition. Emphasis will be placed on filing systems and procedures, records storage and control, and use of equipment. Students will need typing or keyboard knowledge. Managing records on the microcomputer will also be covered.

Course Relevance:

The principles learned in this course will allow the students to effectively work with records and information management. The principles will provide students preparing to enter the business or government sector with a basic knowledge of the management of records and information. The principles learned in this class will also allow those who are already working in business or government to upgrade their skills in and learn more about professional organizations for Records Information Managers. Instruction in the use of an electronic database management program will prepare students to successfully update records on the computer.

Required Materials:

Text:

Stewart, J. and Melesco, N. (2002). *Professional Records and information Management*. New York, NY: Glencoe Division, McGraw-Hill.

Stewart, J. and Melesco, N. (2002). *Filing and Computer Database Projects*. New York, NY: Glencoe Division, McGraw-Hill.

Supplemental Materials

Software:

Microsoft Office XP, Access Program or current database management program

Two high-density 3 ½ inch floppy disks

Through the student involvement in this course, they will develop and document their achievement of the following PACT skills:

Primary skills developed and documented:

1. Time Management
 - By attending classes regularly, prioritizing classroom tasks, and completing assignments according to the course schedule, students demonstrate time management skills

2. Problem Solving
 - Through assignments and discussions, students will demonstrate problem solving skills using concepts and tools from the class.
3. Critical Thinking
 - Students will be able to apply critical thinking skills by gathering facts, generalizing from the facts, and creating new ideas after studying and completing assignments.
4. Reading
 - Through reading materials, following instructions, and completing tasks successfully, students will demonstrate reading ability.
5. Writing
 - Students will demonstrate writing skills in completing their assignments.
6. Computer Literacy
 - Students will utilize database management software to create, design, and update databases.
7. Internet Use
 - Students will navigate the Internet to learn about the records management field, organizations, and jobs available.
8. Field Related Technology
 - Students will use their skills in using a database management program to complete assignments electronic information management.

Secondary Skills (developed but not documented)

Effective Relationships

Teamwork

Ethical Conduct

Assessment Tasks:

These learning outcomes and primary Learning PACT skills will be demonstrated by:

1. Completing assignments and critical thinking activities dealing with concepts covered in class and handing them in on the due date.
2. Understanding the life cycle of records and using concepts learned in class to determine which paperwork is of value and should be retained and which paperwork should be discarded.
3. Writing answers to discussion questions and writing statements and essays for their critical thinking activities.
4. Learning how to convert paper records to electronic form using a database management software program.
5. Completing a simulated experience in managing paper and computer records.

6. Using the records from the simulated experience, students will be required to answer questions regarding the activity.

Course Content:

- I. Themes – Key **recurring concepts** that run throughout this course:
 - A. A record is a piece of information created by or received by an organization or business that gives evidence of a business decision or transaction and should be preserved.
 - B. The functions of records and information management.
 - C. Use rules for filing alphabetically established by the Association of Records Managers and Administrators, Inc. (ARMA).

- II. Issues – Key issues that will be addressed in this course: areas of conflict that must be understood in order to achieve the intended outcome:
 - A. Records and Information Management Professionals have the responsibility of deciding what is a record and what is a nonrecord.
 - B. Numerous local, state, and federal government laws and regulations deal with records and information management.
 - C. Matters of business ethics are relevant to the records and information management professional. Violations of good business ethics frequently bring about criminal and civil legal disputes which often require that records be produced to document activities.

- III. Concepts – Key concepts that must be understood to address the issues:
 - A. Understanding the life cycle of records
 - B. Determining whether a document is more expensive to keep than to discard and whether a document is necessary to keep as a record
 - C. Being aware of laws dealing with business records and government records
 - D. Recognizing the difference between ethical business management and unethical business management.

- IV. Skills – Actions that are essential to achieve the course outcomes.
 - A. Understand the profession of Records and Information Management. Students will be introduced to the profession, learn about employment of Records Managers, and learn about the legal and ethical matters in Records and Information Management.
 - B. Handle paperwork that enters and leaves organizations on a daily basis.
 - C. File using indexing and alphabetizing procedures established by the Association of Records Managers and Administrators.
 - D. Use other systems for organizing paper records.
 - E. Understand retrieval, retention, and recycling records.
 - F. Manage electronic files and use electronic databases and understand how network-based records management systems work.
 - G. Review various image technology and automated systems.
 - H. Identify safety methods, security methods, and disaster recovery methods of records.

Learning Units:

- I. THE PROFESSION OF RECORDS AND INFORMATION MANAGEMENT
 - A. Define records and information management.
 - B. Recognize the functions of records and information management and the steps in the life cycle of records.
 - C. Identify employment opportunities in records and information management.
 - D. Classify and describe specializations in records and information management.
 - E. Identify jobs in both private and public sectors requiring records and information management expertise.
 - F. Describe the type of preparation required for employment in records and information management.
 - G. Distinguish between criminal and civil legal matters.
 - H. Categorize significant federal legislation as relating to business records or government records.
 - I. Discuss civil legal matters that are of importance to RIM employees.

- II. MANAGE PAPER RECORDS
 - A. Identify the different types and sources of incoming paperwork.
 - B. Recall the procedures for opening hard-copy mail.
 - C. Differentiate between voice mail, electronic messaging, and facsimile documents.
 - D. Recognize the costs of keeping versus discarding paperwork.
 - E. Identify the different types and sources of outgoing and internal paperwork.
 - F. Explain how the creation of paperwork can be minimized.
 - G. Detail general principles to be followed in the design of business forms.
 - H. Identify forms-designs and form-filling software.
 - I. Define unit, indexing, alphabetizing, and case.
 - J. Index and alphabetize names of individuals.
 - K. Index and alphabetize organization names.
 - L. Index and alphabetize government names.
 - M. Cross-reference names when appropriate.
 - N. Select equipment and supplies for storage and maintenance of paper records.
 - O. Follow efficient procedures for planning, establishing, and maintaining files for paper records.
 - P. Identify the steps in alphabetic system entry and storage.
 - Q. Recognize alphabetic, subject, and numeric filing systems.
 - R. Describe procedures for retrieving records.
 - S. Recall requirements and procedures for retention

- III. ELECTRONIC INFORMATION MANAGEMENT SYSTEMS
 - A. Define computer terminology related to electronic database systems.
 - B. Identify hardware and software.
 - C. Indicate strategies for planning and developing a database.

- D. Follow procedures to add individual, business, and organization names to electronic files.
- E. Assign filename extensions to electronic files using the principles of identification and abbreviation.
- F. Distinguish between a root directory and a subdirectory.
- G. Cite procedures to label and store computer disks.
- H. Define micrographic, optical disk, and bar-coding technology.
- I. Identify three major considerations in selecting an automated records management system.
- J. Complete alphabetic filing assignments using individual names.
- K. Complete alphabetic filing assignments using business and government names.
- L. Complete numeric filing assignments.
- M. Complete geographic filing assignments.
- N. Complete subject filing assignments.
- O. Complete correspondence management assignments containing decision-making exercises.
- P. Complete alphabetic and subject correspondence filing assignments.

IV. COMPUTER DATABASE PROJECTS

- A. Manage a customer database.
- B. Manage a client database.
- C. Manage an inventory database.
- D. Create and manage an employee database.

Learning Activities:

Learning activities will be assigned within the classroom to assist the student to achieve the intended learning outcomes. Class discussion, lecture, and critical thinking activities will contribute to the learning process. Using hands-on simulated projects, the computer to learn how to use a database management software program, and applying the knowledge by transferring data from paper records to electronic records will allow the student to review techniques learned in the class.

Grade Determination:

The student will be graded on satisfactory completion of assessment tasks (learning activities), attendance, and exams.