

Records Management

Course Outcome Summary

Course Information

Organization	Madison Area Technical College
Developers	Sharon Storms
Development Date	4/13/2001
Revised Date	1/3/2007
Course Number	10-106-103
Instructional Level	Diploma/Associate Degree
Potential Hours of Instruction	36
Total Credits	2

Description

Fundamentals of managing the record life cycle; alphabetic, numeric, subject and geographic filing; supplies and equipment; charge-out procedures; retention schedules; transfer methods; control measurements; imaging systems. Follows recommendations of the Association of Records Managers and Administrators.

Target Population

Records Management is a course for people interested in a business career. Practical information emphasizing the principles and practices of effective records management will be useful to students, as well as to professionals, at managerial, supervisory and operating levels. This course is required for students in the Administrative Assistant program.

Types of Instruction

Instruction Type	Contact Hours	Credits
Classroom Presentation	36	2

Textbooks

Read-Smith, Ginn, Kallaus. *Records Management Study Guide*. South-Western. 2002. **Edition:** Seventh. **ISBN:** 0-538-72467-6.

Read-Smith, Ginn, Kallaus. *Records Management*. South-Western. 2002. **Edition:** Seventh. **ISBN:** 0-538-72466-8.

Learner Supplies

3.5" high density disk. **Manufacturer:** ---.

Exit Learning Outcomes

Core Abilities

- A. Communication
- B. Critical thinking

Competencies

A. Explain the field of Records Management

Linked Core Abilities

Communication

Competence will be demonstrated:

A.1. by answering written questions relating to the field of records management

Criteria - Performance will be satisfactory when:

A.1. you examine how records are classified and used in an office

A.2. you compare early and modern records management operations

A.3. you summarize relevant legislation that affects records management

A.4. you examine the management functions necessary to operate a records management program effectively

A.5. you explore possible careers in records management

B. Apply indexing rules for alphabetic filing.

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

B.1. by indexing documents using alphabetic filing procedures

B.2. by coding documents using alphabetic filing procedures

B.3. by arranging documents using alphabetic filing procedures

Criteria - Performance will be satisfactory when:

B.1. you index personal and business names following the alphabetic filing rules

B.2. you code personal and business names following the alphabetic filing rules

B.3. you arrange personal and business names following the alphabetic filing rules

B.4. you apply alphabetic filing procedures

B.5. you prepare cross-references for personal and business names

B.6. you arrange cross-references for personal and business names

C. Analyze correspondence records storage

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

C.1. by selecting equipment and supplies to set up an alphabetic filing system

C.2. by justifying the selection of equipment and supplies

Criteria - Performance will be satisfactory when:

C.1. you explain terms used in correspondence records management systems

C.2. you identify the basic types of equipment and supplies for correspondence records storage

C.3. you explain considerations for selecting storage equipment and supplies

C.4. you summarize the advantages and disadvantages of the alphabetic method of records storage

C.5. you examine six types of information that should be determined before selection and design of an alphabetic records system

C.6. you explain how color can be used in correspondence records storage

D. Apply procedures for storing correspondence

Linked Core Abilities

Critical thinking

You will demonstrate your competence:

D.1. by completing correspondence tasks

Your performance will be successful when:

D.1. you inspect correspondence

D.2. you index correspondence

D.3. you code correspondence

D.4. you sort correspondence

D.5. you sort correspondence

D.6. you cross-reference correspondence

E. Demonstrate records retention, retrieval, requisition, charge-out, and transfer

Linked Core Abilities

Communication

Competence will be demonstrated:

E.1. by answering questions relating to records, retention, retrieval, and transfer

Criteria - Performance will be satisfactory when:

D.1. you explain the use of a records retention schedule

D.2. you explain retrieval, requisition, charge-out and follow-up procedures

D.3. you explain records activity, two transfer methods, and transfer procedures

D.4. you examine records center control procedures

D.5. you summarize records center software

F. Apply indexing rules for subject filing

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

F.1. by indexing documents using subject filing

F.2. by coding documents using subject filing

F.3. by arranging documents using subject filing

Criteria - Performance will be satisfactory when:

F.1. you summarize subject records management

F.2. you give examples of situations and records appropriate for subject records management

F.3. you summarize advantages and disadvantages of storing and retrieving records by subject

F.4. you compare the dictionary and encyclopedic subject file arrangements

F.5. you examine the guides, folders, and labels used for subject records storage

F.6. you describe four indexes and their use for subject records management

G. Apply indexing rules for geographic filing

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

G.1. by indexing documents using geographic filing procedures

G.2. by coding documents using geographic filing procedures

G.3. by arranging documents using geographic filing procedures

Criteria - Performance will be satisfactory when:

- G.1. you explain the need for geographic records management
- G.2. you identify the kinds of businesses that might use the geographic method of storage
- G.3. you summarize the advantages and disadvantages of geographic records management
- G.4. you compare dictionary and encyclopedic arrangements of geographic records
- G.5. you explain the differences between the lettered guide plan and the location name guide plan
- G.6. you examine an arrangement of guides and folders in the geographic storage method
- G.7. you explain the use of an alphabetic index in the geographic storage method
- G.8. you examine how indexing and coding for the geographic storage method differs from indexing and coding for the alphabetic storage method
- G.9. you summarize the types of cross-references used in the geographic storage method and how they are stored
- G.10. you examine the effect that e-commerce is likely to have on geographic records storage

H. Apply indexing rules for numeric filing

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

- H.1. by indexing documents using numeric filing procedures
- H.2. by coding documents using numeric filing procedures
- H.3. by arranging documents according to numeric filing procedures

Criteria - Performance will be satisfactory when:

- H.1. you summarize numeric records management and lists three reasons for its use
- H.2. you give examples of businesses that use numbers to locate records
- H.3. you examine the basic components of a consecutive numbering methods
- H.4. you explain the storage and retrieval procedures for a consecutive numeric method
- H.5. you examine how to convert an alphabetic records arrangement to a consecutive numeric records arrangement
- H.6. you compares and contrasts consecutive, terminal-digit, and middle-digit numeric storage
- H.7. you summarize the advantages and disadvantages of consecutive numeric records storage
- H.8. you summarize chronologic records storage and explains its use
- H.9. you compare and contrast block-numeric, duplex-numeric, decimal-numeric, and alphanumeric coding
- H.10. you explain how computer indexes and database software can be used with numeric records management

I. Select appropriate image medias for varied applications

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

- I.1. by determining the appropriate image media or media system to use in a given list of applications

Criteria - Performance will be satisfactory when:

- I.1. you identify uses for image records in organizations
- I.2. you summarize four types of microforms
- I.3. you examine four factors related to microfilm quality
- I.4. you summarize microfilming procedures
- I.5. you summarize microfilming equipment
- I.6. you summarize microfilm processing and duplicating equipment and commercial imaging services
- I.7. you examine microform storage, retrieval, and storage environments
- I.8. you examine integrated image systems
- I.9. you summarize records retention for image records
- I.10. you explain how software can be used in image records systems

J. Adapt electronic records to records management principles

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

- H.1. by preparing a list of issues that will affect access
- H.2. by preparing a list of issues that will affect retrieval of electronic records
- H.3. by preparing a list of issues that will affect long-term retention of electronic records

Criteria - Performance will be satisfactory when:

- H.1. you summarize electronic record and identifies uses of electronic records
- H.2. you summarize types of magnetic and optical media
- H.3. you analyze the systems concept as it relates to electronic records systems
- H.4. you examine indexing and retrieving electronic records
- H.5. you examine electronic records issues related to records retention--duplicate records, media compatibility and stability, access, and electronic mail
- H.6. you examine types of storage equipment for active and inactive electronic records
- H.7. you summarize electronic records retention
- H.8. you explain the need for electronic records system and network security
- H.9. you summarize the need for records and information management software for electronic records
- H.10. you examine emerging technologies

K. Investigate security issues related to records management

Linked Core Abilities

Critical thinking

Competence will be demonstrated:

- K.1. by submitting cost analysis
- K.2. by preparing a list of emerging technologies
- K.3. in classroom discussion

Criteria - Performance will be satisfactory when:

- K.1. cost analysis includes the possible costs in recovery of data
- K.2. cost analysis includes the cost of replacing lost or stolen items
- K.3. list includes emerging technologies for security of information

K.4. you explore the impact of keeping confidential records secure

K.5. you discuss cases in which companies have leaked confidential information