COURSE OUTLINE

Records Management

Course Description
BE 108. Records Management. 3 hours credit. Prerequisite: BE 180 or BA 104 with a C or better. 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 of records. The student will study filling systems and procedures, records storage and control, and equipment usage. The student will also learn how to manage records on the microcomputer.

Required Materials
Records management (w/MindLink for MindTap).

Microsoft Office 2007 Access program or higher or current database management program

*For complete textbook material(s) information, refer to https://bookstore.butlercc.edu

Butler-assessed Outcomes
The intention is for the student to be able to
1. Apply the filing functions to a records management program.
2. Demonstrate application of alphabetic, numeric, subject, and geographic filing rules to indexing, coding, sorting, cross-referencing, and storing representative examples of business documents.

Learning PACT Skills that will be developed and documented in this course
Through involvement in this course, the student will develop ability in the following PACT skill area(s):

Analytical Thinking Skills
- Problem solving - By using skills learned in the various lessons, the student will apply rules learned to the various records systems, use techniques to file cards and correspondence in the correct arrangement, and query and filter data.

Major Summative Assessment Task(s)
These Butler-assessed Learning Outcome(s) and the Learning PACT skill(s) will be demonstrated by
1. Completing a simulation activity that measures the ability to apply filing rules to organize and manage paper and computer records accurately so that anyone using the system can retrieve the records.

Skills or Competencies
These actions are essential to achieve the course outcomes:
1. Understand the profession of records and information management.
2. Learn the process of employment as a records manager.
3. Discover the legal and ethical matters in records and information management.
4. Handle paperwork that enters and leaves organizations on a daily basis.
5. File using indexing and alphabetizing procedures established by the Association of Records Managers and Administrators.
6. Use alternative systems for organizing paper records.
7. Understand retrieval, retention, and recycling records.
8. Manage electronic files, use electronic databases, and understand how network-based records management systems work.
9. Review various image technology and automated systems.
10. Identify safety methods, security methods, and disaster recovery methods for records.

Learning Units
I. Records management
   A. Discuss the challenges of the information explosion to records management
   B. Describe the importance of records management to an organization
   C. Describe how records are classified and used in businesses
   D. Discuss relevant legislation that affects records management
   E. Describe the management functions necessary to operate a records management program effectively
   F. Identify possible careers in records management
   G. Access the website that provides related information for this textbook

II. Alphabetic indexing 1-4
   A. Explain the need for indexing rules in alphabetic storage of records and the importance of following these rules consistently
   B. Index, code, and arrange personal and business names in indexing order of units
   C. Index, code, and arrange minor words and symbols in business names
   D. Index, code, and arrange names with punctuation and possessives
   E. Index, code, and arrange names with single letters and abbreviations
   F. Use alphabetic filing procedures
   G. Prepare and arrange cross-references for personal and business names
   H. Sort personal and business names
   I. Find information in database records

III. Alphabetic indexing 5-8
   A. Index, code, and arrange personal and business names with titles and suffixes
   B. Index, code, and arrange personal and business names with articles and particles
   C. Index, code, and arrange business names with numbers
   D. Index, code, and arrange the names of organizations and institutions
   E. Use alphabetic filing procedures
F. Prepare and arrange cross-references for business names
G. Sort personal, business, organization, and institution names
H. Create and find information in a database table

IV. Alphabetic indexing 9-10
   A. Index, code, and arrange personal and business names that are identical
   B. Index, code, and arrange government names
   C. Use alphabetic filing procedures
   D. Prepare and arrange cross-references for foreign business and government names
   E. Sort personal, business, and government names
   F. Select appropriate subject categories to be used within an alphabetic arrangement
   G. Create, sort, and query a database

V. Electronic file management
   A. Describe elements found in an electronic database
   B. Find and sort data in an electronic database
   C. Describe how databases can be used in records management and e-commerce
   D. Describe the differences in how records are sorted manually and by computers
   E. Describe the life cycle for electronic records
   F. Describe and apply electronic file management

VI. Alphabetic records management, equipment, and procedures
   A. Explain terms used in correspondence records management systems
   B. Identify the basic types of equipment and supplies for correspondence records storage
   C. Explain considerations for selecting storage equipment and supplies
   D. Discuss the advantages and disadvantages of the alphabetic method of records storage
   E. Describe types of information that should be determined before selection and design of an alphabetic records system
   F. Explain how color can be used in correspondence records storage
   G. Use procedures for storing correspondence

VII. Records storing, retrieving, and transferring
   A. Explain the importance of developing and implementing a records retention program
   B. List the four values of records, describe each value, and provide an example of each value
   C. Discuss the records inventory, including what it is, why it is done, and what it includes
   D. Describe records retention schedule and explain its purpose
   E. Discuss manual and automated retrieval procedures
   F. List reasons for transferring records
   G. Discuss types of records center control files
H. List capabilities of typical records center software

VIII. Subject records management
   A. Define subject records management
   B. List advantages and disadvantages of storing and retrieving records by subject
   C. Compare the dictionary and encyclopedic subject file arrangements
   D. Describe the guides, folders, and labels used for subject records storage
   E. Describe four indexes and their use for subject records management
   F. List the steps used when storing and retrieving records stored by their subjects
   G. Use computer software to prepare an index for subject records
   H. Store and retrieve records following subject records procedures

IX. Numeric records management
   A. Define numeric records management and list three reasons for its use
   B. Describe the components of a consecutive numbering storage method and procedures for this method
   C. Describe how to convert an alphabetic records arrangement to a consecutive numeric records management
   D. List advantages and disadvantages of consecutive numeric records storage
   E. Compare and contrast consecutives, terminal-digit and middle-digit numeric records storage
   F. Define chronologic records storage and explain its use
   G. Compare and contrast block-numeric, duplex-numeric, decimal-numeric, and alpha-numeric coding
   H. Explain how computer indexes and database software can be used with numeric records management

X. Geographic records management
   A. Explain the need for geographic records management and the kinds of organizations that might use this method
   B. Describe the geographic records storage method and procedures for this method
   C. Explain the use of an alphabetic index in the geographic storage method
   D. Describe the types of cross-references used in the geographic storage method and how they are stored
   E. Describe how files are arranged using compass terms and how this method differs from general alphabetic filing

XI. Electronic and image records
   A. Define electronic record and image record and describe the relationship between the two records media
   B. Define magnetic media and optical media and list three types of each media
   C. Discuss retention for active and inactive electronic records
   D. Discuss records safety and security
   E. List and describe four types of microforms and four factors related to microfilm quality
F. Discuss microfilming procedures and equipment
G. Describe microform storage, retrieval, and storage environments
H. Discuss image records retention
I. Discuss records and information management (RIM) software for electronic and image records

XII. Records and information management program
A. List components of a (RIM) program
B. List responsibilities of a RIM program
C. Define and describe the purpose of a records audit
D. Explain the purpose of a records and information manual
E. List guidelines for constructing a well-designed form
F. Explain the phases of a disaster recovery plan
G. Define and describe knowledge management
H. Discuss the use of RIM software
I. List actions taken to implement a retention schedule.

Learning Activities
Learning activities will be assigned to assist the student to achieve the intended learning outcomes through reading textbook information and applying the knowledge to answering questions, completing drills/skill applications, completing hands-on simulated projects, converting paper records to electronic records using database management program software, and other activities at the discretion of the instructor.

Grade Determination
The student will be graded on learning activities and assessment tasks. Grade determinants may include the following: daily work, quizzes, chapter or unit tests, comprehensive examinations, projects, presentations, class participation, and other methods of evaluation at the discretion of the instructor.