

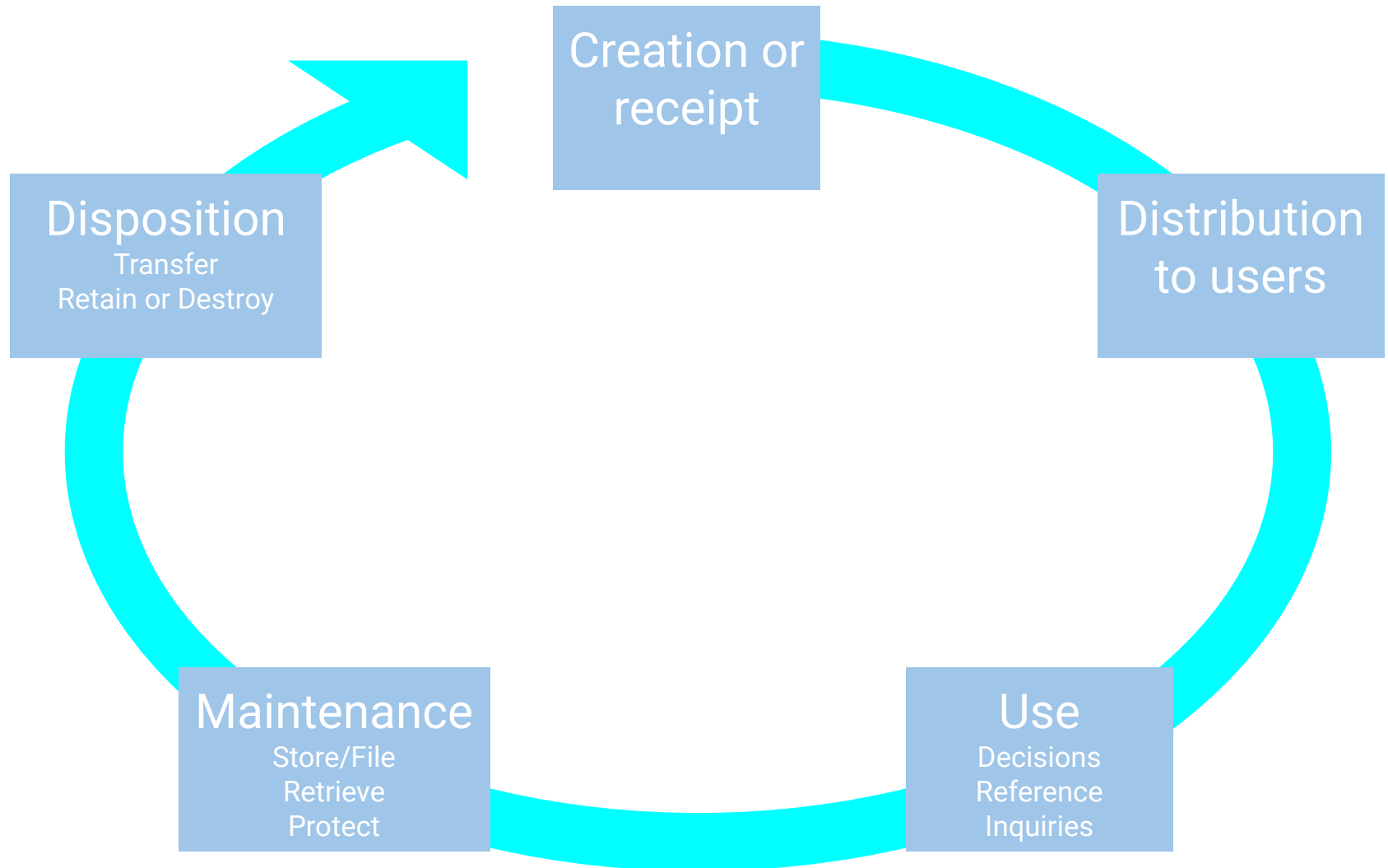
OFFICE PROCEDURES

Chapter 11: Managing Records

Records Management

- The systematic control of records (documents) from the creation to the final disposition
- Record – any type of recorded information
 - Printed documents, such as letters, reports
 - Emails
 - Spreadsheets
 - Etc

Life Cycle of a Record



Storage Systems



Vertical Filing Cabinets



Lateral Filing Cabinet

Storage Systems...



Movable Aisle Storage



Electronic Storage

Storage Supplies

- Files Guides
- File Folders
 - Different sizes
 - Different colours
 - Different styles
- Labels

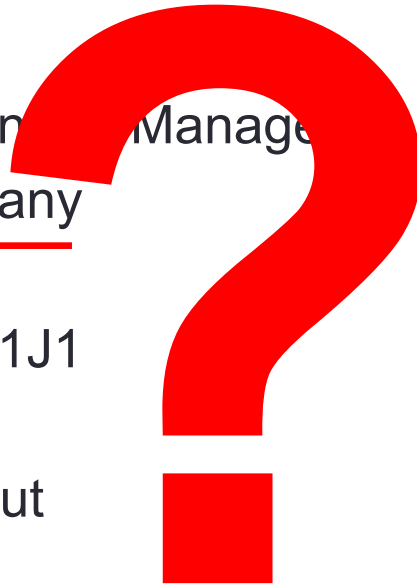
How to File a Record

- How would you file a letter received from:

Herbert Lorenz, General Manager
Capital Trust Company
500 West Street
Winnipeg MB R2J 1J1

...if the letter is about

2011 financial statements for the Winnipeg Sky Office Tower?



Methods of Filing

- Alphabetic: A, B, C, ...
- Indexed alphabetic: Doe, John Q.
- Multi-level Subject: (see Figure 11-9 on page 210)
- Numeric: 1, 2, 3, ...
- Terminal digit: #12-98-47

Methods of Filing...

- An effective filing system must have rules to deal with names that include...
 - The, and, of, &, Co., Mr./Mrs./Ms, Dr., Jr./Sr., 7 (a number)
- and for...
 - Identical names
 - Foreign names

Rules of Filing

- The principal rules for filing are published by

ARMA International

Association of Records Managers and Administrators

(see pages 202 – 208 for examples of all filing rules)

Records Retention, Transfer and Disposal

- Retention Schedules
 - Vital Records
 - Important Records
 - Useful Records
 - Nonessential Records
- Records Transfer
 - Perpetual Transfer
 - Periodic Transfer
- Record Disposal

End