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Course Name

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Code No.**I. COURSE DESCRIPTION:**

This course will give the student an understanding of the scope and complexities of the administrative management of records. Emphasis will be placed on managing and controlling records from the time of their creation until their disposition. Current ARMA filing rules will be covered.

**II. LEARNING OUTCOMES AND ELEMENTS OF THE PERFORMANCE:**

Upon successful completion of this course, the student will demonstrate the ability to:

1. Describe the role and importance of the records and information management (RIM) profession.

Potential Elements of the Performance:

- Discuss the challenge of the information explosion to records managers.
- Describe the importance of records management to an organization.
- Reflect on trends in records and information management.
- Describe how records are classified and used in business.
- Discuss relevant legislation that affects records management.
- Explain the record and information life cycle.
- Describe the management function necessary to operate a records management program effectively.
- Identify possible careers in records management.

2. Discuss the key elements of a records and information management program.

Potential Elements of the Performance:

- List components and responsibilities of a records information management program.
- Define and describe the purpose of a records audit.
- Explain the purpose of a records and information manual.
- List guidelines for constructing a well-designed form.
- Explain the phases of a disaster recovery plan.
- Define and describe knowledge management.
- Discuss the use of RIM software.
- List actions required to implement a retention schedule.

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3. Demonstrate proficiency using the alphabetic filing system for filing business correspondence, reports, and records.

Potential Elements of the Performance:

- Explain the need for indexing rules in alphabetic storage of names and the importance of following these rules consistently.
  - Index, code, and arrange personal and business names in indexing order of units.
  - Index, code, and arrange minor words and symbols in business names.
  - Index, code, and arrange names with punctuation and possessives.
  - Index, code, and arrange names with single letters and abbreviations.
  - Prepare and arrange cross-references for personal and business names.
  - Sort personal and business names.
  - Index, code, and arrange personal and business names with titles, suffixes, and articles.
  - Index, code, and arrange business names with numbers.
  - Index, code, and arrange the names of organizations and institutions.
  - Prepare and arrange cross-references for business names and foreign business and government names.
  - Sort personal, business, organization, and government/institution names.
  - Index, code, and arrange personal and business names that are identical.
  - Apply alphabetic filing procedures.
  - Select appropriate subject categories to be used with an alphabetic arrangement.
4. Demonstrate proficiency using the subject filing system for filing business correspondence, reports, and records.

Potential Elements of the Performance:

- Define subject records management.
- List advantages and disadvantages of storing and retrieving records by subject.
- Index, code, and arrange minor words and symbols in business names.
- Compare the dictionary and encyclopedic subject file arrangement.
- Describe the guides, folders, and labels used for subject records storage.
- Describe the various types of indexes and their use for subject records management.

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- List the steps used when storing and retrieving records stored by their subjects.
  - Use computer software to prepare an index for subject records.
  - Store and retrieve records following subject records procedures.
5. Demonstrate proficiency using the numeric filing system for filing business correspondence, reports, and records.

Potential Elements of Performance:

- Define numeric records management and list reasons for its use.
  - Describe the components of a consecutive numbering storage method and procedures for this method.
  - Describe how to convert an alphabetic records arrangement to a consecutive numeric records arrangement.
  - List advantages and disadvantages of using consecutive numeric records storage.
  - Compare and contrast consecutive, terminal-digit, and middle-digit numeric records storage.
  - Define chronologic records storage and explain its use.
  - Compare and contrast block-numeric, duplex-numeric, decimal-numeric, and alphanumeric coding.
  - Explain how computer indexes and database software can be used with numeric records management.
6. Demonstrate proficiency using the geographic filing system for filing business correspondence, reports, and records.

Potential Elements of Performance:

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

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7. Develop procedures and systems for managing electronic and image records.

Potential Elements of Performance:

- Define electronic record and image record and describe the relationship between the two records media.
- Define magnetic media and optical media and list the various types of each media.
- Discuss retention for active and inactive electronic records.
- Discuss records safety and security.
- List and describe the types of microforms and the factors related to microfilm quality.
- Discuss microfilming procedures and equipment.
- Describe microform storage, retrieval, and storage environments.
- Discuss retention for image records.
- Discuss RIM software for electronic and image records.

8. Develop systems and procedures for managing non-electronic records (correspondence).

Potential Elements of the Performance:

- Explain terms used in correspondence records management systems.
- Identify the basic types of equipment and supplies for correspondence records storage.
- Explain considerations for selecting storage equipment and supplies.
- Discuss the advantages and disadvantages of the alphabetic method of records storage.
- Describe types of information that should be determined before selection and design of an alphabetic records system.
- Explain how colour can be used in correspondence records storage.
- Apply procedures for storing correspondence.

9. Discuss procedures and requirements of an effective records storage, retrieval, and transfer program.

Potential Elements of the Performance:

- Explain the importance of developing and implementing a records retention program.
- List the categories of records values, describe each category, and provide an example of each category.
- Discuss the records inventory, including what it is, why it is done, and what it includes.

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- Describe a records retention schedule and explain its purpose.
- Discuss manual and automated retrieval procedures.
- List reasons for transferring records.
- Discuss types of records centre control files.
- List capabilities of typical records centre software.

### III. TOPICS:

1. Records Management
2. Alphabetic Indexing Rules 1-4
3. Alphabetic Indexing Rules 5-8
4. Alphabetic Indexing Rules 9-10
5. Alphabetic Records Management, Equipment, and Procedures
6. Storing, Retrieving, and Transferring Records
7. Subject Records Management
8. Numeric Records Management
9. Geographic Records Management
10. Electronic and Image Records
11. The Records and Information Management Program

### IV. REQUIRED RESOURCES/TEXTS/MATERIALS:

- *Records Management*, Read and Ginn, 9<sup>th</sup> Edition, South-Western Cengage Learning, 2011
- One file folder (8 ½" x11" - letter size)

### V. EVALUATION PROCESS/GRADING SYSTEM:

Three theory tests **75%**

Daily assignments and online quizzes **25%**

The following semester grades will be assigned to students in post-secondary courses:

<u>Grade</u>	<u>Definition</u>	<u>Grade Point Equivalent</u>
A+	90-100%	4.00
A	80-89%	4.00
B	70-79%	3.00
C	60-69%	2.00
D	50-59%	1.00
F (Fail)	49% or below	0.00
CR (Credit)	Credit for diploma requirements has been awarded.	

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S	Satisfactory achievement in field/clinical placement or non-graded subject areas.
U	Unsatisfactory achievement in field/clinical placement or non-graded subject areas.
X	A temporary grade limited to situations with extenuating circumstances giving a student additional time to complete the requirements for a course.
NR	Grade not reported to Registrar's office.
W	Student has withdrawn from the course without academic penalty.

## VI. SPECIAL NOTES:

### Attendance

Sault College is committed to student success. There is a direct correlation between academic performance and class attendance; therefore, for the benefit of all its constituents, all students are encouraged to attend all of their scheduled learning and evaluation sessions. This implies arriving on time and remaining for the duration of the scheduled session.

It is the student's responsibility to be familiar with the course outline and *Office Administration – Executive Student Manual*. These documents outline classroom policies that must be followed.

By considering the college environment as their workplace for the duration of the program, students will have a standard of performance to meet and will practise the day-to-day skills required to be successful in the work world.

These skills include:

- arriving and leaving class on time
- calling in/e-mailing when not in attendance
- checking college e-mail twice daily as a minimum
- following classroom rules and procedures
- demonstrating appropriate manners and etiquette
- listening attentively when the class is being addressed
- demonstrating respect for others at all times
- focusing on the work at hand
- organizing paperwork and keeping track of deadlines
- producing accurate, mailable documents
- being responsible for your own work

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Failure to follow program policies will be dealt with through an escalating procedure as follows:

- One verbal warning from professor
- One e-mail notification from professor
- Removal from the classroom and meeting with professor
- Meeting with the dean which may result in suspension or expulsion from the course/program

The Student Code of Conduct (found on the portal) provides guidelines and disciplinary procedures for the college community. Academic dishonesty as defined in the Student Code of Conduct will result in a zero grade for all involved parties.

Keyboarding proficiency is an integral component of the Office Administration – Executive program. Students who are unable to keyboard with touch type techniques should practise their skills on a daily basis.

*All the Right Type* typing tutor software is located in the E-wing computer labs and in the Learning Centre. Visit <http://www.ingenuityworks.com/> for more information on purchasing All the Right Type for home use.

Lectures will not be repeated in subsequent classes. A study partner/group is invaluable for notes in the event of an unavoidable absence but must not be depended upon for frequent absences.

It is expected that 100 percent of classroom work be completed as preparation for the tests. The college network (S:/My Documents) should be used as the primary workspace. Students are responsible for maintaining back-ups of all completed files using either a memory stick (USB) or CD.

All requested assignments must be submitted in a labeled folder complete with a plastic USB/CD pocket. All work must be labeled with the student's name and the project information on each page.

A late assignment will be accepted if submitted within **72 hours** of the due date and time. Twenty-five percent will be deducted from late/incomplete assignments automatically. Failure to follow this procedure will result in a zero grade for the assignment.

Occasionally, tours and guest speakers may be arranged outside of class time, and students are expected to arrange their schedules to accommodate attendance at these sessions. Students who miss a tour or a guest speaker will receive a zero grade on any assignment related to the tour/guest speaker activity.



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Students are expected to check college e-mail twice daily as a minimum to ensure timely communication of course information.

Producing accurate work is fundamental to this course. Marks will be deducted for inaccuracies.

Students are expected to be present to write all tests during regularly scheduled classes. Students must ensure that they have the appropriate tools on hand to do the test. Textbooks, including resource materials (*Gregg Reference Manual* and dictionary), are not to be shared during tests.

Test papers may be returned to the student after grading to permit review of the tests. However, the student must return all test papers to the professor who will keep them on file for two weeks after the semester finish date.

Any questions regarding the grading of individual tests must be brought to the professor's attention within two weeks of the date test papers are returned in class.

For those students who have

- attended 75 percent of classes
- completed all required course work
- failed the course or missed one test

a supplementary test will be administered at the end of the module. The mark achieved on the supplemental will replace the lowest test for the final grade calculation.

In exceptional circumstances, the department will review the application of this policy on an individual basis. Supporting documentation may be required.

## **VII. COURSE OUTLINE ADDENDUM:**

The provisions contained in the addendum located on the portal form part of this course outline.