EXCELSIOR COLLEGE

7 Columbia Circle, Albany, NY 12203-5159
Phone: **518.608.8211** | Toll Free: **888.647.2388** | Fax: 518.464.8777
WWW.EXCELSIOR.EDU/CPD

CENTER FOR PROFESSIONAL DEVELOPMENT

RECORDS MANAGEMENT

180 Hours/12 Months/Instructor-Facilitated
Course Code: **CPD113** || Course Cost: **$1395**

OVERVIEW

Excelsior College has partnered with ed2go to bring you the Records Management program. Every organization and every individual has records! Business offices, government agencies, nonprofit groups, educational institutions, and medical facilities—just to name a few—must deal with enormous amounts of records on a daily basis. Executives and support staff are inundated with data and information in various formats.

The Records Management Online Training Program will give you a basic overview of records management terminology, concepts, and procedures to successfully manage records in today's offices. Regardless of the media on which the record is stored, it must be properly managed to be an asset to the organization. Another important component of a professional records management program is legality issues. A comprehensive, legally-sound records retention schedule must be developed and strictly followed so that the company is not held liable for problems that could have been avoided in the first place.

Should records be stored on paper, in an electronic format, in a microform? How is a records inventory conducted? What are the steps in the development of a company-wide records retention schedule? How are records archived? This program will assist you in making those decisions based upon certain characteristics of the records. Also, you'll learn to code and file according to the rules established by the Association of Records Managers and Administrators (ARMA).

OBJECTIVES

Upon successful completion of this program, you'll be able to:

- Understand the business and legal benefits of establishing a records retention program
- Explain how to conduct and document legal research on federal, state, and local records retention requirements
- Establish guidelines for developing vital records operating procedures
- Identify the various types of coding systems
- Recommend solutions for common filing problems and for safeguarding the security and confidentiality of records
- Identify the reasons for careful selection of records housing equipment and describe the criteria and considerations in selecting equipment
- Explain how to establish an effective forms analysis program
- Identify the scope and functions of mail management programs
- Outline policies and procedures for establishing a records disposal system for a records center
- Describe the principles of conservation of archival materials to ensure their permanent preservation

MATERIALS INCLUDED

Excelsior College / ed2go will provide the required textbooks (*Records Management*, 9th Edition, Study Guide, and Simulation) for this program.

OUTLINE

I. What is Records Management?
- A. The Role of Records Management
- B. Classifications
- C. Value
- D. Memory of a Business
- E. Life Cycle of Paper Records
- F. Common Problems

II. Alphabetic Indexing Rules
- A. Consistency in Filing
- B. Key Unit of Names
- C. Rules of Filing

III. Electronic File Management
- A. The Database
- B. E-commerce
- C. Life Cycle of Electronic Records

IV. Alphabetic Records Management, Equipment, and Procedures
- A. Filing and Storage
- B. Storage Method
- C. Storage Equipment and Supplies
- D. Straight Line Tabs
- E. Choosing the Right Equipment
- F. Six Steps in the Records Management Procedure

V. Storing, Retrieving, and Transferring Records
- A. Retention Schedule
- B. The Four Values of Records
- C. Record Cycle
- D. Common Methods of Records Transfer
- E. Software Capabilities

VI. Subject, Numeric, and Geographic Records Management
- A. Advantages and Disadvantages
- B. Arrangement
- C. Index Types
- D. Coding
- E. Number Types
- F. Databases

VII. Electronic and Image Records
- A. Magnetic and Optical Records
- B. Data Input Devices

C. Copies
D. Retention
E. Records Safety and Security
F. Microform
G. RIM Software

VIII. Records and Information Management

A. Elements of a RIM Program
B. Ratios
C. Responsibilities
D. RIM Manual
E. Goals
F. Disaster Recovery
G. Knowledge Management
H. Records Retention Schedule

COMPUTER REQUIREMENTS

This program is compatible with the Windows XP and later operating systems and IE 7 and later browsers.

This program can be taken on either a Mac or a PC. Your computer will need to have an Internet connection and e-mail capabilities.

Adobe Flash Player and Adobe Acrobat Reader are required for this program.

Click here to download the Acrobat Reader.
Click here to download the Flash Player.

PREREQUISITES

There are no specific prerequisites for this program. The Records Management Online Training Program is for you if you want to enhance your records management knowledge or jump-start your career in the records management profession.

INSTRUCTOR BIO

Dr. Gail Brostrom has been both an educator and practitioner of records and information management. After teaching records management and business-related classes at post-secondary and university levels for 15 years, she turned to the corporate environment. Gail was in the corporate world for 20 years as a practicing records manager and supervisor of records analysts, a records center, micrographics, a mail center, and a print center. She received her Ph.D. in business and vocational education in 1982 and her certified records management (CRM) designation in 1997. She was an officer in the local ARMA chapter for six years. She retired in 2004 from a large, mid-west utility.