

'THE Informaa'

Quarterly

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EDITORIAL NOTES

INFORMAA QUARTERLY is a publication of the Records Management Association of Australia. Members of the Association receive the Quarterly as part of their membership entitlement.

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MESSAGE FROM THE FEDERAL PRESIDENT

New Year resolutions are fascinating; we either find something nondescript and of no consequence to list or we go to the other extreme and have no real intention of attempting to meet the challenge necessary to carry out our resolve.

We often become disenchanted, disappointed and annoyed because of our foolishness in being so unrealistic in the goals we set for ourselves. Most times it doesn't really matter, but there are occasions when we should be more realistic, be clearer in our definition, and work with a greater purpose to achieve the goals we set.

Records and information management is an area where we must always strive for credibility. If we are going to be professional in attitude and performance we must "come up with the goods" by achieving our goals - no broken resolutions!

The respect and recognition we seek will only come by producing results.

The year 1987 augurs well as one in which we can accomplish some of the promises made previously:-

1. Let's continue to increase membership of the Association and upgrade those members who have the requirements necessary for professional status.
2. Let's take every opportunity to promote the Association, let's be seen in the community and business world - let's be "visible".
3. Let's communicate with each other, with the Chapters, the Branches and our Federal Council and Directors. If we know about it, then and only then, we can do something about it. Let's get involved.

This month we bring on "board" Tasmania as a Branch of the Association. This has accomplished one of my most cherished dreams. With the Northern Territory Branch being formed at the end of 1986, Tasmania now completes the chain with Branches flying the Association flag in the Territory and every State of Australia. Congratulations to all those people who have worked so very hard to achieve this goal.

Change and its inevitability is part of the future of records and information management and we, as individuals and members of the Association, must be prepared for those technological changes that affect our profession.

The future will be exciting and challenging: let's make a resolution to be prepared and be part of it!

Peter Smith

MESSAGE FROM THE WESTERN AUSTRALIAN BRANCH PRESIDENT

ARE WE READY FOR THE FUTURE?

I pose to you a problem. Who has a 78 RPM record and where can you buy a record player to play that record on?

Technology in our industry changes almost daily and the Association has the responsibility to its membership to provide the forum to disseminate the latest information to enable practitioners to apply this technology to their work environment.

The Records Management Association has as one of its charters the objective to provide professional leadership in records and information management.

Education and providing information about the latest technology should be the Association's major goal.

The Association, through its Annual Conference, has begun to address this challenge. However Federal Council, Branch Councils and the membership-at-large must work towards the uniform introduction of education courses which are accredited and maintained at a standard which reflects the state of the profession.

Within the Association there are two levels of administration which can promote these goals. At branch level the education sub-committee, and at the federal level two committees exist - the Federal Education Committee, which comprises the chair persons of each State branch and the Federal President, and the New Technology Committee of the Federal Council. All branch members should encourage these committees by submitting ideas and questioning committee members at branch monthly meetings to ensure activity and feed-back.

The Western Australian Branch Education Sub-Committee has been working for two years to assemble the framework for a Certificate in Records Management. (See report on page 26) I would urge all W.A. R.M.A.A. members to enrol in the two subjects being offered, to show the Government that there is a need for the complete course.

Graham Dudley

LETTERS TO THE EDITOR

Dear Sir


Several salient points concern me about the issues of membership progression requirements and voting rights of individuals who belong to the Association

- all categories of membership should have basic voting entitlements, at least to the point stressed by Margaret Medcalf in a proposal submitted to the 1986 Federal Council meeting. Namely, people should have a say in who represents them.
- step by step progression in membership rank is both a useful and essential distinction to retain in recognition of effort and excellence.
- the requirements for progression beyond the first level of membership need greater clarification and have clear guidelines set down. Currently such guidelines are not rigorous enough and allow too much subjective assessment.
- professional status should not mean undue emphasis on formal over practical qualifications but clearly depth and breadth of professional competence require the two components to augment each other.
- the requirement for continuous experience for Associate, Member and Fellow should be altered to aggregate experience. This would reflect the realities of work patterns in the past few years and likely to be encountered in the workplace from now on. It is then up to the individual to satisfy Branch or Federal Council that their aggregate experience covers the necessary scope and depth of records management expertise.

The preceding points are only some of the concerns surrounding membership status. It is paramount to keep sight of, in these membership/rights issues, the purpose for which the Association exists. Essentially it should come down to providing a means to encourage and stimulate association, excellence and interaction within and also into related/complementary fields of endeavour.

The rapid changes occurring in the field of information management make it essential for people to possess the requisite skills and to have an Association which keeps abreast of current developments to provide, amongst other things, guidance and standards. In this process it is important to avoid an endless round of self scrutiny. It is apparent from recent comments within the Association by concerned members, including myself, that membership issues need resolution in both the membership progression and voting areas.

Graeme Mertin



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Dear Colleague

In issue no. 10 of the NSW Branch Informaa Dale Kreibig raises some important matters relating to membership status and voting rights within the Association. The points she makes relate to all members and not only those in NSW and from that angle I would like to have seen her letter submitted to and published in an issue of Informaa Quarterly.

At the Alice Springs 1986 meeting of Federal Directors, Western Australian councillors tabled a motion for the amendment of existing regulations covering voting rights to enable ALL members, regardless of status, to vote for their Branch Councillors. We reasoned that it was important and democratic for members to be able to vote for those who represented them. The motion was soundly defeated. There is a fear held by some councillors that by extending voting rights representatives from "the Trade" (i.e. manufacturers, retailers, etc) would rise to positions of power and influence within the Association and use these to their own commercial ends.

Already, though, we have a number of records management consultants holding, or having held, executive positions in the Association (eg. Harry Haxton, Tom Lovett, Dale Kreibig, myself, etc.). Surely the same accusation of vested interest could be levelled against us too if people chose to further that approach! I believe that all those people cited above have in fact worked long and hard for the Association itself.

In the motion put forward by W.A. we endeavoured to propose a compromise between those wanting universal suffrage and those concerned about vested interests. We proposed that candidates for election for branch councils should come from amongst our professional members BUT that all members could vote for them. As branch councillors elect their own executive and federal directors there would be little danger of a person with no background in practical records management or qualifications reaching an executive position.

I am leaving here as a separate issue the admission to Associate status of people who have worked for many years on the sales/trade side of records management and amassed a wealth of experience and knowledge.

IF our members want wider voting rights then they must raise their voices at branch meetings, lobby their councillors and write to this column.

I was instrumental in calling for the publication of a journal such as Informaa Quarterly, at the 1984 Queensland federal directors meeting. I believed that the Association had come of age and needed a national publication to weld it together, give an avenue for records management professional literature and to provide an organ for our membership to express its views and desires.

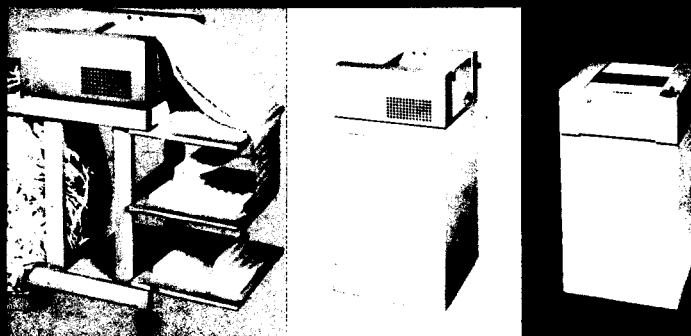
I have been rather disappointed in the lack of "Letters to the Editor" but in part I attribute this to the fact that responsibility for publication of the Quarterly is a moveable feast passing from State to State. As we are all volunteers we did this initially to avoid a heavy workload on any one group or person. However I strongly believe that the Quarterly does now require a national editor or co-ordinator to centralise advertising sales, handle subscriptions, distribution, contributions, printing, format, etc.

I urge members to put pen to paper and submit their thoughts to this section. The next issue in May will be published by the South Australian Branch.

Marita D. Hoo

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INFORMATION MANAGEMENT - A WIDER PERSPECTIVE?

by

Rosemary Longhurst

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The terms "Information Management" and the often associated "Information Resources Management" have been around for some time now in academic and professional journals. Many writers have used them in noting the need to break down old divisions between the established information professions to embrace a new, more powerful, role. In a recent stimulating article, Mary Sandow-Quirk quotes authorities¹ calling for such a widened perspective as far back as 1975.

A newer dimension to this debate is identified by Chris Smith of Computer Power in a stimulating paper² given at the recent Alice Springs Conference (Third Convention of the Records Management Association of Australia, September, 1986). She cites the growing demand from organisations for people qualified to fill a role designated "Information Manager" or "Information Services Co-ordinator". She showed a variety of titles and descriptions in recruitment advertisements, all with the common themes of information as a corporate resource and integration of information provision. Thus, although such integration has long been part of the rhetoric of training in the different information professions, office automation and the increased awareness of management are only now making it a reality in the workplace.

Ms Smith asks "Who will be the Information Manager of the future?" and concludes that records managers are best placed to fill the need, when compared with librarians or candidates with a DP background. Ms Sandow-Quirk however, argues that the need can only be met by a partnership or convergence of records management and librarianship skills (with a clear bias towards Schools of Librarianship for fostering such a partnership). Both these recent writers appear to discount the contribution of information professionals trained in the computer field, although both acknowledge that some technological understanding is required to cope with current complexities.

While I strongly agree that records managers and librarians have a major contribution to make - which records managers in particular, need to recognise and sell with more confidence - I am convinced that none of the existing information disciplines can, alone, supply adequate candidates for tomorrow's information management responsibilities. In the new organisational environment, individuals trained solely in records management, librarianship or data processing will require substantial reorientation and acquisition of skills to move successfully into information management.

In any jostling for position which may occur, I feel that the emerging computer-based discipline of information systems has a major part to play, which is ignored by librarians and records managers at their peril. Although it is grounded in data processing, this field has a strong body of literature calling for a more information-oriented, less technical, development of information professionals. The concept of information as a major organisational resource is fundamental to this thinking.

A 1983 paper³ included in a "State of the Art Report" on business information systems describes research conducted with a sample of Corporate Information Officers (CIOs) who hold responsibility for large information systems budgets:

"The results of this research suggest that our sample of CIOs, working in very successful large corporations, are rapidly developing a new role for themselves - one that is radically different from the traditional role of the IS manager."

Findings confirmed that much of the responsibility for hardware and software is being handed over to user divisions and departments, so that the organizations therefore needed "a focal point for planning and facilitating the organization's move into the information era." They found that the erstwhile information systems manager had already taken on this role, to fulfil his title as corporate information officer, with broad responsibility for developing policies and strategies for the information resources of the firm. Perhaps most significantly, the survey showed that the respondents were becoming "an integral part of the top management team."

Such findings appear to give the lie to Ms Smith's claim that the "computer experts" have lost the trust of senior management because of their failure to deliver the promises of computer-based management information systems, and hence are unlikely to be serious candidates for an information management position.

The information systems community acknowledges that many of the claims for management information systems (MIS) have never been realised. Rudi Hirschheim,⁴ for instance, has shown how the introduction of sophisticated database software has almost always supported existing DP application structures, rather than allowing the co-ordination or integration of the information resource across the organisation, as intended by database theorists. There is much to support Mary Sadow-Quirk's⁵ assertion that:

"....the designers of MIS were wrapped in a technological cocoon and neglected the human element. The current problems lie, not so much with the technology as in the familiar difficulty (of) getting the right information to the right people at the right time. It is clear then that the technologists do not have the information management empire entirely to themselves, as they themselves admit."

Nevertheless, organisational computing now has a history of its own and although we cannot shrug off the legacy of fear and distrust spread by some well publicised systems failures, they do not invalidate the claims of all "computer experts" to manage an organisation's information resource. Most of us recognised some time ago that "throwing technology at problems" is inappropriate and that we still have much to learn from more established disciplines, but an in-depth technological understanding remains a basic pre-requisite for any information management position.

IS professionals see that their task is no longer to computerise a given business function but increasingly to identify the problem or problems for solution. There is a recognition that we

are dealing with complex problem situations which are specific to the organisation with its particular conflicts and range of individual perspectives. As reputable information professionals, then, we can no longer peddle a set of context-free solutions, requiring organizations to tailor their problems to fit whatever is currently on offer. These are some of the major shifts of thinking occurring over the last few years in the computer arena. I consider that further major re-orientation is necessary to fully come to terms with the idea of information as valuable in itself, rather than its form of presentation or the process by which it is produced.

I believe that similar significant shifts are also necessary for the records management and librarianship professionals to meet the challenge of information management in a technological age. These shifts will involve -

- (a) incorporating some of the skills and concepts of associated information disciplines.
- (b) evoking a wider perspective and responsibility which seeks to identify and satisfy organisational or social needs.
- (c) understanding the nature of the material - how is the term "information" to be understood, over and above the particular formats we are used to handling (documents/data/publications)?

Such considerations can, and probably will, run counter to the demands and precepts of the individual professions. Nor is it just a question of bolting together the pieces - some records management skills plus some DP skills plus some librarianship skills - but of welding these together within a clear theoretical framework which helps a professional to decide which skills and concepts are relevant, and how they should be balanced in any given context. It is the ideas about information: what it is, how it is represented, manipulated and used, which allow practitioners to apply appropriate evolving skills and techniques in the real world. In short, a common theoretical base is needed. Some points which seem to be critical to the meaning of the term "Information Management" would, I suggest, form part of or be central to such a framework. These are as follows:

1. A view of information as a resource for an organisation.
2. A focus on the information content, to allow choice about how it will be represented (information format).
3. A primary concern with the quality of information rather than its quantity or speed of provision.
4. A recognition that information is not a product but a means of exchange.
5. A concern with the impact of information provision in context.

These points require proper consideration in some more detailed paper, however.

When it comes to deciding which kind of system is appropriate to solve an information provision problem or to respond to an identified information need, I would argue that it is vitally necessary to have some over-arching conception of information which does not bias an information manager toward the forms of information handled with which he is familiar, depending on his/her background. A particular problem may be solved by developing an intelligent knowledge-based system (an IKBS), by referring to an on-line database, by circulating a paper form or a mixture of all three. Only the information professional can decide, according to his appreciation of the organisational context and a thorough grounding in all types of information system.

Only an individual of such wide-ranging knowledge is able to offer adequate advice to organisations at the top level of management necessary to ensure that the requisite structures and policies are in place for realistic information management and to handle the associated multi-million dollar budgets.

"...up until recently the technology did not exist that would permit the organisation to treat information in the same way that other corporate assets were handled, i.e. as an invaluable resource. Today that technology does exist, but the organisational structures and policies necessary to manage information as a resource have not been created within most business entities."⁶

Five years on, a few structures are beginning to emerge, it seems, although little research is available. Among these is the creation of a position with overall responsibility for information problems (which the above-quoted research failed to identify five years ago). My contention in this paper is that such positions will best be filled by individuals with some knowledge and understanding of all three of the established information professions, namely records management, librarianship and DP (or its more recent development, IS). Lack of experience or understanding in any of these will therefore be a serious deficiency. Beyond this, there is an urgent need to integrate the perspectives of these three disciplines at a more academic level, to provide the common theoretical base which will support the evolution of information management in an increasingly technological and complex environment. These points are echoed in the following quotation - taken from a chapter on "Information Resource Management" in an established Records Management text:

"Information resource management implies that it is time to view the multiple forms of paperwork not as documents or computer programs to be managed, but, rather, as information content to be treated as a valuable resource... The objectives are to raise the quality of information, deepen its impact, and achieve economy and job satisfaction in the exchange of information."⁶

I could, doubtless, have found a similar quotation from a DP or librarianship text. A DP text would refer to data rather than programs since such statements are usually to be found under the "Database" heading. To include the librarian's part of the picture and update the statement to refer to all forms of information technology, I could rephrase as follows -

"... it is time to view the multiple forms of information not as documents, published material or computer data to be managed, but, rather, as information content to be treated as a valuable resource..."

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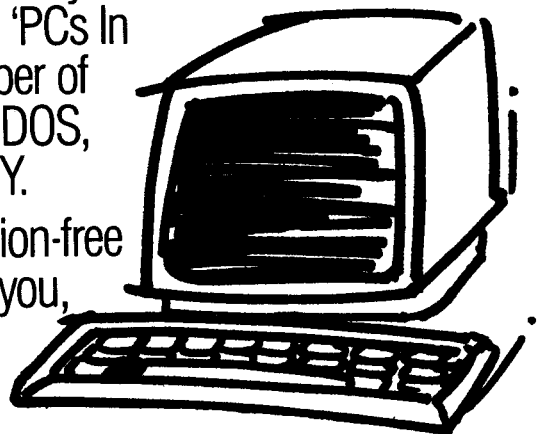
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NOTICE OF PUBLICATION
Information Technology Study
Community Perceptions

The Science, Industry and Technology Council of Western Australia announces publication of the Information Technology Study. The Study was commissioned by the Hon Mal Bryce, Deputy Premier of Western Australia and Minister for Technology.

The study is the first official investigation of information technology in Western Australia; it describes the effect of information technology on the economy, society, education, and business, and makes some comments on the law as it relates to IT. The study findings are that Western Australia is an information economy, which is an economy that is dependent on the free flow and use of information as a major part of its functioning, and also that information technology affects every member of Western Australian society.

Included in the issues addressed by the Study are the following:

- Information can be valuable or it can be useless.
- Should everyone have access to all information?
- How is privacy affected?
- What is the state of the information industry in WA?
- What help does it need?
- How much does it cost?
- How can costs be reduced?
- How is education affected?
- How can education be improved?
- What is the effect on jobs?

These are some of the questions the study tries to answer.

The study contains some of the views and ideas of members of the Western Australian community in answer to some of these questions.

Some of the opinions obtained indicate that everybody should have access to all information, except commercial and security information; that personal information should be under the control of the individual who is the subject of the information; that the information industry is healthy, but in need of greater skill in areas such as marketing and management; that some infrastructure costs are too high; that the effect on jobs is beneficial, but that employment structures, and whence educational and training needs, from now on will be fluid.

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IMPLEMENTING AUTOMATED RECORDS MANAGEMENT SYSTEMS

by
M. Rosenthal

The successful implementation of any records system is dependent on particular circumstances. However there are several points that can make implementation of any system, including manual systems, a little easier.

Confidence

Probably the most important aspect in implementing any new system is that you are confident. Confidence in your system will see you through the frustrations of system failures and staff misunderstandings. This confidence begins at the specification stage.

Ensure that the system designed and specified includes all that you need for an efficient records management system. Understand the reasons for automating. Specify exactly what you require from the system. Be confident that the system will achieve effective records management for your organization.

Modifications

Don't become overwhelmed by "optional extras" that will be displayed by the various system suppliers. Select a system that does what you need. One system available has an audible alarm that sounds when a file requires papers to be attached. It is an asset for the organization that has major problems with loose paper but is only an unnecessary extra for other organizations.

There will be modifications to your specification that suppliers will display that perhaps you had not thought about. Be careful, some modifications will be an asset others will be a waste of resources.

Manuals

User manuals are essential for implementing any new system whether it be an automated records system with 20 remote locations or a simple card index for use at a single location.

There are two manuals vital to the successful implementation of the automated system. The first manual is the guide to using the system. It should include a system overview and detailed explanations of the functions of the system.

The system guide should be available before the installation of the automated RMS or be available at the time of installation. Never contemplate a smooth implementation if the manuals do not arrive with the system. One organization that implemented a new RMS did

not have manuals available until five months after installation. Many misunderstandings and frustrations would have been avoided had the manuals been available earlier. Make sure you have enough copies so that all operators have their own copy.

The second manual is the guide to the keyboard. These will usually arrive with the equipment. No matter how experienced an operator may be, a new keyboard will certainly have some different features. Give consideration to sending staff to courses on keyboard skills, especially staff who would be using terminals constantly.

Both manuals should be compulsory reading for all operators of the system.

Training

Another essential component for easier implementation is training. Training operators of the automated RMS should be before, or, at least, at the time of installation of system equipment. One organization I worked with commenced training operators six months before the implementation of the RMS. This training involved analysis of the existing procedures, the evaluation of each procedure and the changes that would take place with the automated RMS. The result of this early training was a team of records staff who were eager for the new system and who understood the principles of records management.

Another organization implemented a new system without identifying the operators and without a policy on system training. Operators were trained in conjunction with the conversion of existing records to the RMS. The result was a group of individual records staff who could use and operate the RMS but who had limited understanding of why.

Any training package should include identification of the relationships between the new automated RMS and the existing system, definitions of system jargon and familiarization with keyboards and screens.

A lack of adequately trained operators will make or break any system. Poorly trained operators are easily recognised by users and they will erode any confidence the users have in the system.

One important aspect of training operators is to play down the difficulties in the system. Not all people are at ease with computers so explaining difficulties to them will be of little assistance. One system I implemented had a complex log-on procedure, so during

the first few days of training I carried out the log-on procedures. When the trainees' confidence was up I then introduced the more difficult procedures.

Publicity

Make sure that people whom the system services know that a new automated system is being implemented.

Publicise the new system. Conduct seminars. Send out bulletins. Put up posters. The idea is to prepare the users for the new system, and, more importantly, to prepare them for the changes that will occur.

It is much easier to explain en masse new conventions rather than repeat explanations each time a user enters the records centre. Again I have found through experience that publicity before the implementation had users eager to help records officers. Another case where users were not informed of the changes, meant that records staff were constantly repeating answers to the same questions. Most staff get bored and tired with this type of questioning.

Users do not need to know all the details. A clear concise overview highlighting the goals and describing obvious changes will be enough for most users. Include items such as the numbering convention, new file covers, contact points for files and contact points for further information. Do not be afraid to invite the more inquisitive users for a tour of the system. It could be a perfect opportunity to promote records management as a professional service rather than just a file repository.

Pilot Phase

Allow for a pilot phase, that is, a time after installation when things will go wrong. And they will. Be prepared for this. The system suppliers will call this stage "ironing out the bugs" or "debugging". You will call it a number of things, probably all unprintable. Little things like user codes not being loaded, parts of the software not available, bad response times or printers not working.

Maintenance and Support

Ensure that you develop good rapport with the people who will maintain and support the system's software and hardware. You will need to be able to communicate effectively with these people. It is important to remember that these people deal with problem solving all day and are there to assist you. What may be a major problem for you may only be a flick of a switch for them. Of course it also works in reverse.

Keep a diary and record all the problems and unusual occurrences. Record the exact details of transactions leading up to the incident. What might seem trivial to you could be a solution to a major problem. I once had a rather major problem with a log-on procedure which after much analysis was found to be caused by the addition of a "blank" in the log-off procedure. Much time would have been saved if I had transcribed exactly the transaction but instead I thought the "blank" not worth a mention.

It is probably not a bad idea to actually meet the staff who are providing your system's maintenance and support. Most people feel more comfortable dealing with a person they have met rather than just a voice at the end of the line.

These are only tips that might help you implement an automated records management system. Some may not be applicable to your situation, some may be too expensive, some may be too obvious. However I believe that these ideas will make implementing an automated records management system a little easier.

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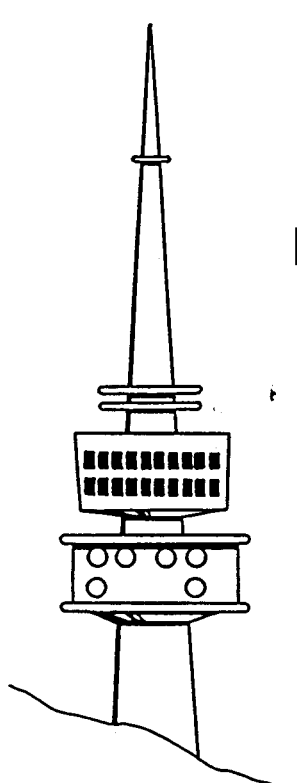
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RECORDS MANAGEMENT AND THE CITY OF SUBIACO: IN THE BEGINNING

by

Lorraine Smith

Records Manager/Co-ordinator, City of Subiaco

The City of Subiaco, covering an area of seven square km just west of Perth, has a population of 14,000 and caters to the needs of some 6,700 ratepayers. A small municipality, employing 61 administrative staff, little thought had been given until recently to the question of records management. In addition, the City's archives were poorly represented, the Western Australian State Archives in the Battye Library holding Subiaco's rate and minute books dated 1896-1948.

By 1984 records storage areas at the Council were bulging at the seams, despite efforts to control the paper explosion by occasional culling and some concern was held for the future of the City's archives. The need for some form of records management advice was recognised by the Deputy Town Clerk, Mr Shervington, and through his efforts a Community Employment Programme (CEP) designed to establish the City's archives and create a records retention schedule specific to the needs of the Council was commenced during June 1985.

THE ARCHIVES PROJECT

The Archives Project, as the CEP was known, employed both a research worker and clerical assistant for a period of 32 weeks. During the first two weeks an intensive training period was undertaken at the Battye Library. Under the supervision of Battye Library staff, experience was gained in identifying, labelling and packaging archival material. Upon completion of this crash course in archives the research worker and assistant were set loose upon the records of the City of Subiaco.

Fifty years of accumulated records provided a rather daunting picture, the stuff of which records managers' nightmares are made. However, once the panic had subsided and a closer inspection of the records made, it was obvious that the records could be divided into two distinct classes, active or current and inactive or non-current records.

In order to tidy up the backlog of disused records and establish a starting point from which to create the records retention schedule it was decided to first tackle the Council's inactive records. These records were stored in a variety of places. Every nook and cranny imaginable provided a home for those records that had been stored away "just in case". Compiling a master list of these turned into a treasure hunt. Provided with clues as to their whereabouts by various staff members, the hunt encompassed such areas as boxes under desks, disused filing cabinets, bottom drawers and a dusty back shed. With the master list complete and a further listing of probable archival material compiled, a visit to the Battye Library was made to verify with the staff that all material of archival interest had been listed. Next came the onerous task of assigning the chosen archival material accession numbers, followed by the boxing and listing of the same, ready for transfer to the Battye Library. One of the

more pleasurable aspects of dealing with this accumulation of inactive local government records was the destruction of those remaining non-archival, housekeeping type of inactive records, though a thorough listing of those records to be destroyed was made before the match was lit.

The inactive records dealt with, and the City's archives put on the map, it was time to take a look at the active records. The active records, those used on a regular basis by Council's administrative staff, were stored in the Council's filing and strong rooms. Fortunately, the alpha-numeric file plan, a manual system devised in recent years by a previous records officer, was quite a comprehensive document and provided a good base around which to custom fit a records retention system. In making the retention decisions each record series was individually assessed and the series title, identification symbols, a description of content and a retention decision proposed by the research worker were noted on individual inventory sheets. Upon completing collation of the inventory sheets Council department heads and Battye Library staff were consulted regarding the proposed retention decisions and changes made where deemed appropriate. Once the final retention decisions had been set and authorised by the Deputy State Archivist they were scheduled so as to relate to the existing file plan.

As with almost anything new, without some form of instruction as to its use, it may as well not exist. For this reason a procedures manual detailing a method of retention schedule usage was prepared, attempting to dovetail records retention procedures into the existing filing and general duties performed by Council's records staff.

The conclusion of the Archives Project saw the records retention schedule and procedures manual complete and in the final stages of production. The project had achieved its aim in establishing a municipal archives and creating a records retention schedule specific to the needs of the City of Subiaco. However, the project had also revealed that further work was necessary to tidy up the City's records before the implementation of the schedule on a day to day basis could be considered a viable and workable proposition.

TIDYING UP THE LOOSE ENDS

The tidying up remaining to be done included the relocation and organisation of Council's financial records required by law to be retained for seven financial years. The back shed encountered when searching for inactive records was also the resting place for those financial records in semi-retirement.

During 1986 a new storage area for these records was constructed in conjunction with adjacent storage areas for Health Department and gardeners' equipment. The relocation of the finance records was undertaken by the research officer re-employed by the Council for a period of twelve months as a records officer to complete all preliminary work in preparation for the implementation of the records retention schedule in 1987.

The records are shelved, in standard size boxes, by year of destruction. Each box front lists the box contents in full, the destruction date, shelf location and a number specific to that box. Retrieval of the records is executed by means of a card index arranged alphabetically by record series title within subject sections, such as Payroll Records, Accounting Records and Rates Records.

In addition to the tidy up of the semi-retired financial records, closer inspection revealed that the property files were in desperate need of culling. These files, filed alpha-numerically by street name and property number in an eleven sided compactus, contained property details, miscellaneous correspondence and information relevant to the individual properties spanning the years 1930-1986. Due to property demolition or renovation, amalgamation of titles, change of ownership or simply the passing of time much of this information was obsolete. Close to eleven months were spent culling these files in accordance with the retention schedule entry specific to property file documents. Much of the obsolete information was binned during the process, but a small percentage was relevant to the City's archives and subsequently prepared for transfer to the Battye Library. The type of obsolete material retained for archival purposes included house plans and building licence applications, sign erection licence applications and diagrams, reports written for Council purposes detailing the history of property and other trivia including, in some cases, photographs hoped to convey to some future researcher the status quo of a property at a given point in time.

Through the undertakings of the previous eighteen months, the City's archives have been well and truly established and the way made for the implementation of the records retention schedule. 1987 will see, in conjunction with the setting up of the new retention system, the establishment of a Municipal Archives display. To be prepared by the records manager/co-ordinator (a promotion for the records officer) the display will consist of material collected by Council over the years along with archival material discovered during the previous eighteen months' activities.

IN CONCLUSION

Major change is not always easily made and perhaps this article may lend some hope to other records officers embarking upon a similar task, that with a little research, advice, determination, hard slog and diplomacy a lot can be achieved in this field on a relatively low budget in a reasonably short period of time. The long term benefits of such an exercise to any local authority include establishment of archives, better space utilization in the areas of records storage and more efficient records retrieval and reference unhampered by obsolete information. Additionally, the creation of a more ordered work environment for all records staff and the job satisfaction derived from a feat accomplished more than justifies the effort expended. In this instance anyway, the end more than justified the means.

FILING MEDICINE.... A CHALLENGE TO A NON PROFESSIONAL

by

Robert May

Hospital Administration Manager

The filing system was not well!

The symptoms of a system threatening disease had appeared: memory lapses, tension, frustration, overweight files, misfiling. The photocopier was overworked - although I'm sure photocopying is a disease in itself of epidemic proportions. The whole system was grossly overweight - at least 15-18 years since its last major surgery. The system's condition was stable and just holding its own. However the prognosis (outlook) was not good.

Then there was an emergency - don't think areas in a hospital that deal with patients are the only ones that have to deal with emergencies! The boss could not find a document on junior medical staffing responsibility in the wards. The medical opinion was given. The system had collapsed. The condition was critical and life threatening. Treatment was necessary.

The Administrative Assistant would be sent to a course. The result would be equal to that of a new wonder drug. Two weeks after the course nothing had changed. Something had gone wrong. Now eighteen months later the system's condition has shown some improvement. It certainly has shed some weight, but the new drug has worked slowly, there are still parts of the system on which it has had no effect.

The point that I am trying to illustrate is that managers pay little attention to filing and subsequently overall records management until valuable information is lost or they cannot find something in the first file they look at. Then when the problem is recognised they expect nothing short of a miracle.

I would like to share some of the lessons that I have learnt and some of the frustrations and challenges I have experienced in converting a filing "system" to a Keyword Filing System - a non professional doing what should have been a professional's job - in the hope that it may be of some assistance to others who may be placed in a similar position.

Medical Administration is one of the three major areas of a teaching hospital's organisational structure (the other two areas being General Administration and Nursing Administration). The Medical Director who is Head of Medical Administration is responsible for the standard of medical care delivered to all patients attending the hospital. Medical Administration performs the personnel function for all medical staff. It has under its control all medical staff and the allied health departments such as Speech Therapy, Physiotherapy, etc. It interacts with all departments of the hospital, has dealings with external associations such as parent support groups, general practitioners, other hospitals, and it is represented, or represents the hospital on some 86 committees, both internal and external to the hospital. My position within the Department is that of Administrative Assistant.

Filing prior to the conversion was loosely based on an alphabetical system with no one person within the office being responsible for the filing. The two day course to which I was sent was "Organising the Office Memory" conducted under the auspices of the Australian Institute of Management.

The Lessons

The first lesson that I have learnt is that converting a filing system is not a simple task which can be achieved in a matter of weeks. This was my first misapprehension. I returned from the course full of enthusiasm but after examining two files I knew that this was not going to be easy. The more files I opened the longer and darker the tunnel seemed to get. I am sure that at times there was no light at the end of it.

Always **PLAN**. A plan for the whole conversion process should be written down step by step. The most important part in any planning process is to write the plan down. If it can be written down it can be done. If it cannot be written down there is a good chance it cannot be done. In retrospect if I had done this I am sure there would not have been little bouts of losing confidence in what I was doing.

Management has to be convinced that a system takes many many man hours to plan, convert and maintain. I am sure that it thinks once it is converted that it will look after itself. I have had to undertake this task in addition to performing the duties of my position. As a result I have contracted a nervous reaction to the question "Is the filing system finished yet?" If managers want the information yesterday (I have yet to meet the manager who wants the information tomorrow!) they are going to have to provide the resources to do so the day before. Unfortunately this is not recognised in many organisations.

The Frustrations

The course which I attended certainly gave me the enthusiasm but I must admit that when I got back to work I found that I was lacking in knowledge of practical applications. Yet my superior's expectations were still there. I had been sent to a course and I had to perform. But I must admit I did not know where to start.

It was obvious to me I had to get the contents of the cupboards and boxes down to something more manageable. The files had not been culled for at least 15 years. When a file had become too thick it was put into a box and a new file started. Yet I knew that these old files contained information that was vital to the running of Medical Administration (and the hospital) and could not be just discarded. During this process each file was culled and broken into the following files:-

Information of historical importance
Information that was vital
Information relating to 1984/1985
Information relating to 1986

Anything else was discarded. Each of the four files for each subject title were then placed in boxes using the old system of classification (alphabetically) prior to being classified by keyword subject. During this process the subject titles of the documents were written into notebooks. In addition to assisting with the allocation of keywords the notebooks provided a valuable resource for the later compilation of a directory index of names, abbreviations, etc of all the colleges, parent support groups, and associations with which the hospital has dealings.

Whilst the process outlined may seem time consuming to professionals (the whole process took about 12 months on a part time basis) it did prove to me to be a valuable exercise. Firstly, it provided me with a simple explanation as to why we could not find information. Things were not even in the obvious file. There was a miscellaneous file for every letter of the alphabet - each bulging to its seams. The miscellaneous files even contained documents for which there were subject files. Secondly, the process gave me an invaluable insight into the contents of the filing system which later proved to be a valuable resource for the selection of keywords. Thirdly, the exercise made me conscious of just how much photocopying is done in an office, of which we must ask how much is really necessary? One 80-page report was found in 13 different files throughout the system.

Finally it gave me a laugh or two.... the contents of the following Memo To The Manager..... "The Honorary Staff is on occasions seriously inconvenienced because there is no lavatory for their use. I would be glad if it could be arranged that the Out-patient lavatory not be occupied during the day as a lunch room, or alternatively, that some other lavatory be made available for the use of the Honorary Staff."

The selection of keywords was probably the most frustrating part of the whole process, in classifying information with confidence. Will it be easily retrieved by others, both today and in the future? Would there be enough information to justify the choice of a keyword? The standard keywords suggested for keyword filing are for those organisations performing business functions. It was obvious from the onset that very few of those keywords would be suitable for the specialised function of medical administration.

The keywords that I have selected (with the possibility of modifications) for a medically oriented environment are as follows:-

ACCOMMODATION	-	office, storage or living space within the hospital
ACCREDITATION	-	the recognition of external bodies for membership of that body, such as accreditation by colleges for training of medical staff.
ACTS (of Parliament)	-	includes correspondence and "issues" raised by those Acts.
ADMINISTRATION	-	used for the day to day running of the hospital (not the overall organisation of the hospital)
APPOINTMENTS	-	all matters relating to the appointment of staff
ASSOCIATIONS	-	all outside organisations (excluding government) with which the hospital has relationships, such as parent support groups.
BOARD (of Management) COLLEGES	-	the governing body of the hospital role, functions, constitutions, etc training colleges.
COMMITTEES	-	because of the extensive representation the hospital has on external committees both internal and external committees have been included, with the first descriptor indicating the name of the "parent" body.
COMPLAINTS	-	all complaints regardless of the source, particular areas of services. Excludes those placed in the hands of solicitors.
DEATHS	-	all matters relating to the death of a patient.
DEPARTMENTS	-	based on the hospital's organisational structure, includes all matters relating to the specific functions of that Department.
DISEASES	-	based on the International Classification.
DRUGS	-	information, policy, procedures and literature.
EDUCATION EQUIPMENT FINANCE ETHICS	-	includes training requirements.
FORMS	-	ethics involved in research, experimentation supplies of forms both internal and external. First descriptor indicates issuing body.
GOVERNMENT	-	includes all government organisations, including Health Department. Based on the listings in the Government Section of the Telephone Directory.
INDUSTRIAL	-	industrial awards, agreements and variations.
LEGAL	-	where possible individual files are maintained under patient's name.

LICENCES

MANAGEMENT REPORTING

- MEDICAL RECORDS - aspects of confidentiality, access, computerisation (not individual patient records)
- NURSING - philosophy of nursing service, nursing procedures, etc
- ORGANISATION - includes all matters relating to the hospital's structure, role and objectives.
- PATIENTS - all information relating to patient's admission, discharge, etc.
- POLICY - official hospital policy, medical nursing, infection control policies. A copy of the policy is also placed under the relevant subject file.
- PUBLICATIONS
- QUALITY ASSURANCE - programs for, results of programs
- REDEVELOPMENT - temporary keyword for all information relating to the hospital's redevelopment programme.

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Modifications will have to be made. It is beginning to emerge that PATIENTS is too broad a keyword, as is the keyword DISEASES.

Challenges

Perhaps the greatest challenge is keeping abreast of the ever changing medical terminology. Perhaps no other branch of science has been affected as much by technology, or has specialised as much as medicine. Although a Thesaurus has been created it has not proved to be adequate to cope with the changes. In one day correspondence came into the office on the following subjects - Pharmacokinetics, Gentamycin Assays, a Dihydergote. I have worked in this medically orientated area for eight years but I had no idea whether they were drugs, diseases or new government departments. The contents of the letters did not enlighten me any further.

No doubt I have learnt important principles of records management the hard way! There are still many more challenges: creating an index on computer, selecting file covers, keyboarding minutes of meetings, contents of computer discs, at least six months more work. If I had only known that two days attendance at a course would have resulted in two years work!

CUP* UPDATE - THE WA EDUCATION SCENE

by

Chris Coggin

Education Committee Convenor, WA Branch

In the last issue of Informaa Quarterly published by the Western Australian Branch, an outline of the situation in RM education in this State mentioned the two fronts on which negotiations were proceeding. Briefly these concerned graduate qualifications on the one hand and certificate level on the other. Good progress can now be reported in the latter, but pursuance of a graduate qualification is still a more distant goal.

Certificate Level

At this level the Technical and Further Education Branch of the Western Australian Education Department will be running two units in 1987. Called Records Management 1A and 1B, the units represent the distillation of a great deal of input on the part of the State's Education Committee as well as TAFE personnel.

The Branch's initial aim was for a full certificate in Records Management to be up and running in 1987, and those two units were to form part of such a certificate. The position now is that introduction of a full certificate course will have to wait until next year's commitments are considered by TAFE.

As far as the certificate itself is concerned a full syllabus was formulated and completed in close conjunction with TAFE during 1986, and the decision not to introduce the entire course this year - made by the Education Department in a climate of cutbacks etc - was a most disappointing one.

For interested records personnel, however, an encouraging feature of the 1987 TAFE offering is that Records Management 1A and 1B have been included as electives in the Diplomas in Management and Public Administration. Candidates may register for the RM units as "stand alone" units or as part of one of those Diploma courses. If the latter option is followed, units should be taken which will later form part of the Records Management Certificate course. To assist in this selection, a schedule of the Records Management Certificate units was published in the October issue of the WA Informaa: those interested could compare the list with the TAFE handbooks and ensure they picked those Diploma units which will eventually form part of a full Certificate course.

The Branch is hoping that response to Records Management 1A and 1B in 1987 will demonstrate the demand for RM education in this State in the most convincing way. Efforts to have a full Certificate introduced next year will then have the empirical backing so important in such cases. Both the Premier and the Minister for Education have indicated their willingness to consider further approaches to get a full Certificate off the ground.

* Certification Undoubtedly for Pedagogy

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Space constraints preclude reproducing the syllabus for the two RM units in full. However, a summary of the salient features is given at the end of this article.

Graduate level

Efforts to persuade the School of Management of the Division of Business and Administration of Curtin University of Technology (CUT) to introduce a course in records management at the bachelor level were discontinued owing to various developments and other commitments at that institution. The WA Branch is, however, conscious of the need to foster graduate involvement in records management education planning, and is keeping this aspect under constant review.

It is for this reason that it welcomed the presentation of a three-day course in information management by CUT early in 1987. Although not specifically designed for graduates per se, the course comprised a high profile selection of components in the RM area, and in the absence of other short courses in RM run by the Branch itself the availability of presentations like this can only be to the benefit of local members.

In 1986 would-be information professionals attending CUT could, for the first time, take a unit with some records management content. The current course on Information and Library Studies includes a unit called Archives Management, and this embodies basic theories and other elements of records management. Response to the unit was most encouraging, some 36 students electing to do this particular option, which includes a practicum at the State Archives of Western Australia, a division of the J. S. Battye Library of West Australian History.

Reference

1. Coggin, C. Records management at the crossroads: professional education in Western Australia, Informaa Quarterly, 11, No. 4, August, 1985, p. 9-11.

APPENDIX

TAFE UNITS IN RECORDS MANAGEMENT, 1987

Records Management 1A

Synopsis: An introduction to records management, supplies, equipment, planning, working procedures, file movements, and resubmits, security and vital records.

General aims: To introduce students to the concept of modern business records management programs, to identify common procedures, to provide an overview of the planning activities and to familiarise students with types of equipment.

Duration: 2 hours per week for 18 weeks.
40% internal assessment, 60% examination

Records Management 1B

Synopsis: File creation and maintenance, filing systems, indexing methods, use of a thesaurus, information retrieval, records retention, disposal, archives

General aims: To introduce students to the particular records procedures of file creation and maintenance, file titling, indexing, file retention, disposal, keyword file titling, archival practice.

Duration: 2 hours per week for 18 weeks
40% internal assessment, 60% examination

The syllabus lists 130 "student objectives", in other words the specific areas which will be studied. They range from such headings as "Trace the development of records management from its origin to present status" through "Establish guidelines for selection of equipment for visible index systems" to "Develop guidelines for implementing a vital records protection program."

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LETTER FROM THE PRESIDENT OF THE INTERNATIONAL RECORDS MANAGEMENT COUNCIL

The Australians really know how to put on a conference! I was privileged to attend and participate in the Third Annual Conference of the Records Management Association of Australia held in Alice Springs last September. The meeting was well organised and planned to provide a meaningful learning experience for all those who attended. My congratulations.

The meeting also provided an opportunity for the Board of Directors of the International Records Management Council to hold its annual general meeting as well as the Board's business meeting. Australia is well represented in the IRMC leadership for the next two years with Graham Dudley as executive Vice President, Peter Smith as area Vice President for Australia and Oceania, and Helen Francis as the RMAA delegate to the Board. Besides giving us the added leadership strength we need, it sets the stage for our second International Congress to be held in Perth in 1989.

The IRMC was founded in the early 70s and has as its membership affiliated records associations in Australia, Great Britain, the Philippines and North America, corporate memberships comprised of corporation and educational institutions and individuals throughout the world. National associations are currently being organised in Malaysia and Ghana. It has as its main communications vehicle the International Records Management Journal, which is distributed to its members on a quarterly basis.

Efforts are continually made to raise funds through grants, increased membership, and the sale of publications to enable the Council to proceed with its planned research studies in the establishment of international records management standards, filing system guidelines, glossaries, and training aids. The support of its affiliated associations is the best example of professional dedication to this international concept. Through this relationship each association is able to achieve its own objectives and yet share in a global acceptance of the information and records management profession.

Our future plans are to pursue and accomplish the Council's objectives and programs. In 1987, the IRMC will hold its business meeting in Anaheim, California at the time of the Association of Records Managers and Administrators (ARMA) conference, in 1988 we will meet in Paris along with the International Council on Archives (ICA) Congress, and in 1989, it's PERTH and our Congress joined with the RMAA conference. Each of these is a must attend for records managers.

Thank you RMAA for letting us share your podium in 1986.

William Benedon

NEWS FROM THE BRANCHES

TASMANIA

A meeting was convened at the Hydro-Electric Commission on 8th December to discuss the formation of a Tasmanian Branch of RMAA.

Response to the invitation to attend was overwhelming with over fifty participants representing all major State Government agencies as well as Commonwealth and local government. Attendees included agency administrators as well as records managers.

The enthusiasm generated by the meeting showed that the move to establish records management in this State on a professional basis was widely supported not just by records managers but also by management of agencies.

A Steering Committee was formed consisting of Mark Bennett and John Behrens (Hydro-Electric Commission), Jackie Elliot (Tasmanian Development Authority), Robyn Eastley (State Archives), Lindy Mackey (Glenorchy City Council), Gloria Spence (Department of Public Administration), Tina Howard (Forestry Commission), Robert McManus (Corporate Affairs) and Tracey Finegan (TAFE).

Participants were given application forms to join RMAA and asked to return them to John Behrens (HEC) for forwarding to the National President. To date (14 January 1987) twenty-six replies have been received.

An inaugural meeting is planned tentatively for the 20th of February in conjunction with a half day seminar to which the National President of RMAA, other members of the National Executive and Denis Comber (NSW Records Management Office) have been invited.

WESTERN AUSTRALIA

At the Annual General Meeting held on 10 July 1986, the President, in his report, indicated there had been an increase of 20% on the 1985 membership figure, giving a total of 109, which was most encouraging and more have joined since then. A special effort has been made to promote the Association to local government and this has proved fruitful as several local authorities have become corporate members. Monthly general meetings were held with a variety of guest speakers giving an insight into different facets of records management, with an emphasis on computerization of records. A Christmas luncheon was held in December. Branch Council has also met on a regular monthly basis.

During the year four of our members with Affiliate status were upgraded to Associate status and were duly presented with certificates. The Chairman and members of the Education Committee have been working hard with a view to getting the TAFE Course - Certificate in Records Management - off the ground.

As 1987 progresses we are looking forward to offering helpful discussions at our monthly general meetings and perhaps holding one or two half-day seminars during the year.

NEW SOUTH WALES

Membership of the NSW Branch is growing steadily, and the Branch has increased its membership every month in this quarter.

Meetings have been well attended. The October meeting was given over to members who attended the Third National Convention at Alice Springs. The members who spoke gave their views to those who were unable to attend. The November meeting was a Products Night hosted by IBM at their office in Sydney. This meeting proved to be an informative evening for those fortunate enough to be there. The December meeting was our Christmas function. A good night was had by all. It was a very pleasant evening which allowed members to mingle informally.

The Local Government Chapter ran a successful two day seminar hosted by Holroyd Municipal Council on 11-12 December 1986. The seminar was opened by the Minister for Local Government, Mrs Janice Crosio. Approximately 100 people were in attendance, with 10 exhibitors participating in the trade display. Seminar proceedings and videos of the sessions are available*.

The Hunter Region Chapter is functioning well. Their Christmas function was held at Hamilton TAFE with 18 members in attendance.

The Education Committee has been hard at work during the second half of this year on the formulation of a certificate course in records management. It is hoped that the course will commence at three TAFE colleges in 1988.

*Editor's note: see page 35 for details of how to order.

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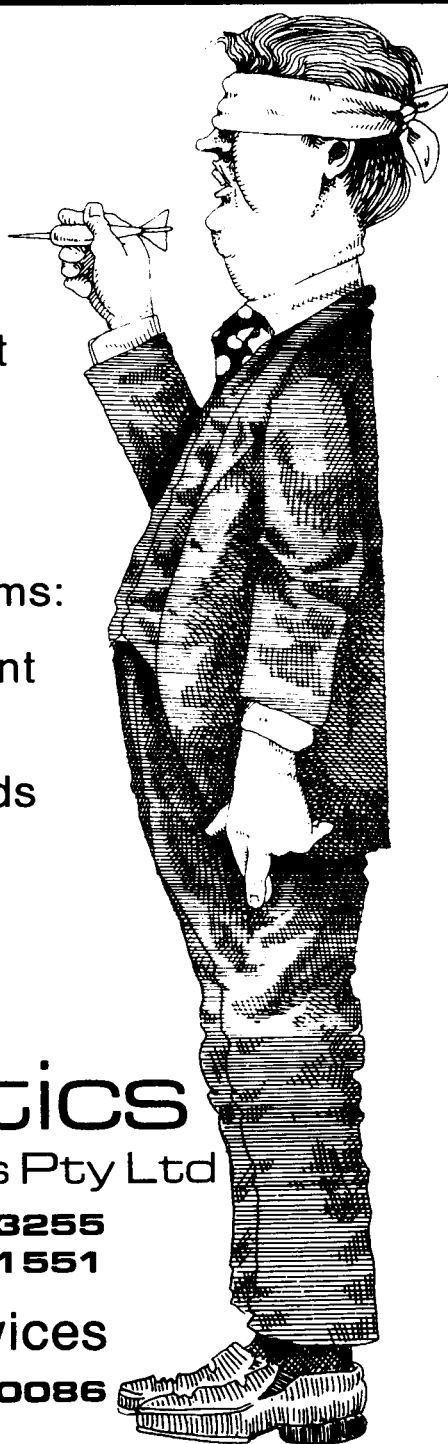
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BOOK REVIEWS

OFFICE AUTOMATION: A Social and Organisational Perspective

R.A.Hirschheim, Wiley Series in Information Systems, Wiley, 1985. (RRP \$64.65)

AUTOMATED OFFICE SYSTEMS MANAGEMENT, Smith, Baker, Sumner and Bate, Wiley, 1985 (RRP \$77.90)

Neither of these books is easy reading - at the prices quoted perhaps no-one would expect them to be!

Both books fill a much-needed role, however, which is not covered or only incidentally covered, by the recent rush of works in the office automation arena; they concentrate on the issues and impact of the technology rather than the technology itself.

"Research undertaken in the past ten years has concluded that it is the social rather than the technical aspects of a technology which are responsible for its effects...but...the literature and discussions on office systems are almost entirely technical in nature."
(Hirschheim, Preface)

"As we move further into the information age, more and more people will be needed to manage information and the information process ... We believe that the key ingredient in any successful advanced office system is people: human factors and effective management are key elements in improving office production." (Smith, Baker, Sumner, Bate: Foreward and Preface)

Both books also start with an historical review to set OA in context.

Hirschheim, writing from Oxford University, provides a thoroughly scholarly work, examining different theoretical "perspectives" which seek to understand and explain what goes on in offices. He argues that an "interpretivist" view is necessary to improve our ability to comprehend and predict the effects of technological intervention in organisations. The body of work supporting this view and opposing rationales are excellently set out and thus this is an ideal text for postgraduate study in any area impacting on information systems or their management.

This in-depth coverage of major thinkers thoroughly succeeds in meeting the aim of the Wiley Series in Info. Systems - "To provide a forum for the serious discussion of IS". It is an essential book that someone needed to write, but it is not a book which offers immediate practical help for management.

The second work (Smith et al) is addressed to managers despite its academic origins. "After studying the book you should be able to read an OA periodical and understand the basic concepts presented... As you apply the knowledge and principles that you gain, you should feel that you are making a major contribution to your organisation."

Like most American works, learning objectives are set out for each chapter and the aim is mastery in breadth rather than depth. Most office automation books provide an overview of the technology but this one goes much further than most in examining the principles behind development and management of information systems in organisations. A particular focus is in the emerging role for an "Office Systems Manager". They say "Future information technology managers will come from many different backgrounds. They will need to understand how to apply technology more than they will need to know how technology works."

I couldn't agree more! I wish their coverage of the various processes and management functions defined would recognise that there is more than one view of how things should be approached, but I suppose that would be to ask for a more scholarly analysis than this book is intended to provide.

Neither work really provides a summary of issues in the management of information and supporting technology which is both easy to read and covers alternative views of how things should be "analysed" and handled, but each meets a need. I would recommend the Smith et al for self-study by managers and will certainly order Hirschheim's as a study text for my own courses.

Perhaps I should think about writing the book that remains to be written!

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