


Western Australia

Home of  The America's Cup



INFORMAA QUARTERLY

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EDITOR'S NOTES

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Q U O V A D I S ?

Richard Leggo
President WA Branch RMAA

Organisations exist to serve the needs of their members.

They will grow and develop or wither and die according to the perceptions of those members as to how well their needs are being met.

Why did you join the Records Management Association of Australia?

Is it because it is a professional association where you can associate with your fellow professionals?

Is it because of the image of a professional association which may enhance your promotional or appointment prospects?

Is it because you desire professional development - to learn better skills?

Or did you simply join to fill in your spare time?

Looking back over the two years I have been Branch President of Western Australia, I take pleasure from some things and disappointment from others.

In my first year we had considerable difficulty in maintaining, in the Branch Council, the degree of enthusiasm and dedication which is necessary to make an Association work well.

Our numbers were low in the Branch and in the Council. Much work for a few hands. The programmes for our monthly meeting were not well organised and accounted, to my mind, for relatively low attendances.

The last year has shown a marked improvement in programmes. In Christine Shervington we have had an efficient and enthusiastic Programme Director who has arranged a whole series of interesting topics and good speakers and has done so, well

in advance, so that members are well informed. Why then has our attendance been relatively worse than the previous year?

No member of the Branch Council has expressed the thought that programmes are unattractive. No one has suggested that we should engage in different activities, although there has been some suggestion that we meet too often.

In the first half of the financial year our Branch Secretary Maggie Exon gave us a great deal of drive with well prepared meeting agendas and attention to the affairs of the Association. We know how essential that kind of service is because unfortunately, with Maggie unwell during the last few months the Branch Council has lost a great deal of drive. This was further exacerbated by the absence overseas of Graham Dudley, our Vice President and Treasurer.

The Secretary and the Treasurer do an enormous amount of work for the Association. Without their voluntary support the system would not work at all.

These are particularly onerous tasks and it is becoming increasingly difficult to find volunteers to fill the job.

Editor of INFORMAA is another task which requires monthly dedication. We have not been able to recruit an Editor during the last year and it has been up to Marita Hoo and Graham Dudley to keep the show rolling.

This item might be a bit like washing our own dirty linen in the national wash tub, but I suspect that other branches might have similar difficulty. It is therefore worthwhile to say some truths about ourselves in case this might help others.

The Western Australian Branch now posts out 100 INFORMAA'S every month (86 to its own members) and yet we get less than 12 to a Branch meeting.

Membership of the Association is a two-way-street. It brings us benefits by its professionalism and by professional association. We have to contribute not only our subs but our efforts, to make it work.

It seems to me that the time has been reached when all of us should consider carefully why we have joined. If it is simply to get the benefit of professional association then I for one will be strongly in favour of greater professionalism involving increased subscriptions and employment of officers to carry

out the necessary tasks of running the Association. It is hardly fair to consider that a few enthusiasts should carry the burden when the membership is paying a remarkably low subscription and putting in a remarkably low effort.

Our monthly programmes are interesting in that they open up a vista of experiences in visiting different places and seeing different systems. While they have broadened everyone's experience it is very unlikely that they have deepened it.

Chris Coggin and his Committee investigating professional qualifications and courses have made remarkable progress during the year and we are hopeful that new courses will be available through WAIT and TAFE but we haven't run any short courses or seminars nor do our members seem to be looking for that.

What do the Members want?

Quo Vadis?

Letters to the Editor

In his article "The Records Management Feasibility Study and the Role of the Records Management Consultant" in Informaa Quarterly, v. 1, (2) 1985, Tom Lovett makes many pertinent points concerning the role that a professional records manager has to play in the introduction of a records management programme into an organization.

As he so rightly points out "senior managers tend to underestimate the scope of the implementation task, the staffing and the time required to implement an effective system." I am sure that Tom will agree that senior managers also fail to understand the need to stabilize the staff working in records areas, whether there be a new system or not. They also lack appreciation of the amount of time that is required to maintain a system and subsequently pull records staff

away from records duties to "plug-in" other holes in the organization. They tend to let training of post-implementation staff and maintenance of procedure manuals lapse.

An effective, efficient system if not professionally managed can easily fall into disarray regardless of whether the organization is large or small.

In instances where a records management system is established by a consultant and later crumbles or is corrupted by untrained staff and managers a lot of hard work goes to waste and the reputation of the consultant may come into question through no fault of his own. It is essential that consultants endeavour to get a firm commitment from their clients for an on-going maintenance by dedicated staff, on-going training programmes and professional management of the system. BEFORE commencing

implementation. Otherwise the consultant should give serious consideration to even commencing the project.

Organizations which have invested in a new professionally designed and implemented system should either employ experienced records technicians and records managers or contract companies that now offer maintenance services. A listing of information management contractors and consultants offering such services can be obtained from the Information Consultants, Freelancers and Brokers Directory published by the Information Management and Consulting Group, GPO Box 2128T, Melbourne, Vic. 3001

Marita Hoo (RMAA, WA Branch)
Abtec Information Services

Why Attend a Conference Graham Dudley Vice President WA Branch Vice President Federal Council

There's an old adage that "we're never too old to learn." And in today's high technology economy, this saying was never more true. The need to keep up with new developments and obtain answers to problems is the prime reason why successful men and women sign up in record numbers year after year for seminars, evening courses, suppliers' training sessions, workshops and conferences.

The Search for Knowledge

In the records management industry, the Annual Conference of the Records Management Association of Australia is the main forum for the dissemination of information on this subject. This year the Sydney Branch is hosting the Second National Records Management Conference to be held from the 16th September to the 18th September, 1985 in

There are record managers from legal, medical, and government and private organisations who are thirsting for applications in their specialities. There are educators collecting information on data management and information management to improve the effectiveness of their operations.

Sydney, to which records managers and exhibitors alike will come in search of education about their field of work.

There are consultants and records managers who want more advanced information about new developments in video, laser discs and microfilm system planning and office automation.

There are technical experts and technicians who are delving into hi-tech trends regarding video and optical discs as well as other sophisticated innovations.

Seminars Provide Information

All of these "students" realise that the workshops, seminars and special conferences at conventions provide a veritable treasure of useful information. And these people are generating their mental storage batteries with this knowledge so that they will return to their departments with a fresh approach to old problems and situations.

All these formal sessions are supplemented every day at conventions by the endless contacts which these students make during conversations with their colleagues from around

Operating Keyword Indexing
at the University of Western Australia's Records Office
Anthea Love
Records Officer, UWA

INTRODUCTION

This article gives an outline of the keyword indexing method as it is operated in the Central Records Office at the University of Western Australia. The keyword system has been operating for over a year and some assessment can now be made of its advantages. The following profile attempts to examine the advantages in relation to the practical problems faced during this first year of operation.

The keyword indexing method was introduced to replace the old classification system which was a consecutive numbering system totalling up to four digits. This old system worked efficiently when the correspondence flow was minimal. The classification clerks tended to memorise the most frequently used file numbers and with a relatively stable staff this was reasonably effective. In the seventies the number of students and staff increased and the document flow rose by one hundred per cent. Government cutbacks in the eighties brought a reduction in resources in the field of education and as a result the Records Office lost staff, although its workload was doubled. Older staff retired and the juniors who replaced them were relatively untrained. The indexing system, which relied heavily on the memory of the classifier began to show its many flaws. The numerous staff changes interrupted continuity of indexing and correspondence relating to the same subject was placed on different files resulting in large gaps in the University's corporate memory. This brought severe criticism from users who were unable to locate the correspondence which they required. Records Office staff were depreciated by users, and together with the strain of an increased workload, morale in the office sank to its lowest point. It was at this time

that senior management began a review of the records area to investigate alternative methods of classification and indexing and to consider the appointment of professional staff to manage the section.

The Records Review Working Party was established by the Registrar in 1981 to examine the existing system to investigate alternative records management methods with a view to streamlining Records Office procedures. The Working Party ascertained that the least efficient area in the Records Office was the classification and indexing system. Its deficiencies were destroying the effectiveness of the Records Office as a whole. Three main problems in the index were emphasised by the Working Party.

1. There were difficulties in locating topics because of the inconsistencies and a lack of extensive cross-referencing from one subject to another.

2. File titles were not definitive enough which caused correspondence on related topics to be placed on different files.

The University Archivist, a member of the Working Party, investigated alternative classification and indexing methods and reported that the keyword method seemed a viable alternative to the system presently in operation. As a result the Archivist was requested to construct a keyword system for the classification of the University's administrative correspondence. The first Classification Manual for General Files and its companion volume Thesaurus of General Administrative and Functional Keywords and Descriptors appeared in July, 1983 to coincide with the implementation of the KWOC (Keyword Out of Context) indexing system.

Keyword Classification and KWOC Indexing

In the keyword system documents are classified by subject, not by originator. A ten digit hierarchical system, corresponding to the subject of the correspondence, maintains the files in subject groups which would not be possible with a consecutive numbering system. The keyword classification scheme is constructed round ten general areas. These are as follows:

<u>Category no.</u>	<u>Category</u>	<u>Colour</u>
01	ACADEMIC ACTIVITIES	BLACK
02	GENERAL ADMIN.	LIGHT GREEN
03	EQUIPMENT AND RUNNING COSTS	SILVER GREY
04	FINANCIAL	BLUE
05	LEGISLATIVE	MARCON
06	ORGANISATION AND STRUCTURE	RED
07	PHYSICAL FACILITIES	BROWN
08	SERVICES	ORANGE
09	STAFFING	YELLOW
10	STUDENT	DARK GREEN

The ten categories do not appear in the file title; they are denoted by the numbers 01 and 10 and by the coloured binding on the file spine as outlined above. These ten categories are more narrowly defined by keywords and descriptors. The keywords, or primary subject areas, can be subdivided into secondary, tertiary, and quaternary or quinary areas by the addition of the descriptors.

Ex. 01/01/001/001.

01 = ACADEMIC ACTIVITIES

General area denoted by black file spine (does not appear in file title).

01 = ACADEMIC DEVELOPMENTS

Keyword
(Appears in title)

001 = CENTRES OF EXCELLENCE

1st Descriptor
(Appears in title)

001 = POLICY

2nd Descriptor
(Appears in file title)

(See Appendix 1 for a sample page from the Classification Manual for General Files.)

The companion volume to the Classification Manual, the Thesaurus, comprises three elements which act as lead in vocabulary to the system:

- (1) Keywords
- (2) Descriptors.
- (3) Forbidden terms.

(1) Keywords

The listing of keywords defines how the keyword has been used and also the forbidden terms which the keyword has replaced. These are presented by UF (used for) in the Thesaurus. Descriptors which can be used to qualify the keyword are represented by NT (narrow terms). The term RT (related terms) refers to subject related keywords/descriptors.

(2) Descriptors

The descriptors are included as "lead in" terms to ensure that all aspects of a subject are grouped together in the index. Where two or more descriptors are very closely related an RD (related descriptor) reference appears in the Thesaurus.

(3) Forbidden Terms

Forbidden terms related to categories which are not used in the University of Western Australia's classification system. These are frequently synonyms or abbreviations. One keyword only has been chosen to represent a subject and these are listed in the Thesaurus, otherwise terms are written out in full.

In this way the Thesaurus controls the vocabulary of the classification system by ensuring that only approved terminology is used in the creation of files. (See Appendix 2 for a sample page from the Thesaurus of General Administrative and Functional Keywords and Descriptors.)

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Once the new classification system had been established the enormous task of converting the old system's general administrative files into the new keyword system began. As the new files were opened details of file number, volume, title, cull and creation date were entered into the administrative on-line computer, a VAX 11/70, using a Dataretrieve software package which had been adapted inhouse to a records management function by the Western Australian Regional Computing Centre. File details were added in blocks as each area in the old system was closed off. At the end of six months c. 10,000 file titles had been added to the master index and the first computerised Keyword Out of Context, or KWOC index, was printed. When loading the file titles on to the VAX an asterisk was used to separate the keywords and descriptors. This determines the access points in the KWOC index. For example, 09/04/002/087 = DEPARTMENTAL STAFFING*ACADEMIC*BOTANY. Each keyword and descriptor has an entry in the index, that is under "Departmental Staffing", "Academic" and "Botany". Thus three access points for this file appear in the index in strict alphabetical order.

Close control is exercised in the use of descriptors. Abbreviations are standardised to ensure consistency of access. If inconsistencies creep in the whole index is faulty and entries are out of alignment with each other, making access to information difficult.

A bound KWOC index is produced annually and is distributed to users, with updates produced every month. Central Records updates the whole index every three months but not in bound form. Ideally, the user copies should be updated every three months, but the cost of printing inhibits this.

It is one thing to implement a keyword classification system with computerised retrieval and it is another to operate it. In the remainder of this article the advantages of the University of Western Australia's system will be examined in relation to some of

the practical problems faced during the first year of operation.

1. The Numbering System

The meaningful hierarchical numbering system was adopted because of its advantages to users and to Records Office staff. Subject related files are grouped together in file bays. When a user requires the files relating to his area they can be retrieved quickly and replaced efficiently. Initially there were complaints from users who were concerned about the size of the ten digit file numbers. Users were familiar with the old four digit (or less) consecutive numbering system and many had memorised the numbers of the files which they had used most frequently. Understandably, they found it impossible to memorise the new ten digit file numbers. The only solution to this problem was user familiarity with the system. When users understood that there was no need for them to memorise the file numbers, but merely a keyword, or descriptor, they began to see the advantages of the hierarchical numbering system. The old Index to General Files was full of inconsistencies, eg. the entries for Department of Geography were found under "Departments" and not "Geography". In one case the entry for the "Second Chair in Philosophy" was found under neither "Philosophy" nor "Chair", but under "Second". Once users began using the KWOC Index to General Files, in conjunction with the Classification Manual and Thesaurus, they rapidly began to appreciate the clearly defined access points which appeared in complete alphabetical order. After a period of about three months complaints about the numbering system ceased.

2. Keyword Control

The Classification Manual for General Files is capable of expansion of either adding to the ten main categories, to the keywords within these ten areas, or to the descriptors within keyword areas. Additions to the keywords and descriptors are rigidly controlled. Any assumed

additions to the Classification Manual are checked against the Thesaurus. If no areas exist to accommodate a subject then a new area is created and amendments are made to the Classification Manual and Thesaurus. It is an open-ended system which is as efficient as the staff who administer it. The decision to open files lies with the Records Officer and it is only she who can authorise any alterations to the Classification Manual and Thesaurus. Duplication of areas, and thus of files, is avoided by efficient indexing and a staff who are trained in the complexities of the system.

The keyword indexing method has operated effectively at the University of Western Australia for the past year. However, no classification system is perfect and some criticisms can be made of keyword indexing. The main problem is in determining how far the method should go in narrowing the descriptor field. In the initial stages of operation the users expressed concern at the discreteness of the new file titles. For example two files had been opened using the numbers 06/05/005/001 and 06/05/005/002.

06 = ORGANISATION AND STRUCTURE

05 = COMPANIES

005 = UNISCAN

001 = CABR

and

06/05/005/002 = CABR

FINANCIAL

Users complained that these two files overlapped to the extent that a great deal of cross-referencing was necessary. It had been intended to use one file for administrative correspondence (06/05/001/001) and the other for financial matters (06/05/005/002). It soon became apparent that the correspondence was difficult to separate into two definite groups. The classification clerks, classifying correctly according to their guidelines, were mixing financial and administrative matters as it was unclear from the correspondence which type belonged to which file. Users were further frustrated by requesting one file and finding

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that they needed both files to see the complete documentation on the subject. The problem was resolved by amalgamating both files and eliminating the 06/05/005/002 "Financial" file. This was done after discussions with senior administrative staff and the Central Records classification operators. It is an extreme case and not one which is often repeated, but it does illustrate one of the major problems of keyword classification, that is that the discreteness of areas has to be carefully controlled, not only in relation to the rules of the system, but in relation to user needs. When the keyword method was examined discreteness of indexing was seen as a definite advantage as opposed to the generalities which proliferated in the old consecutive numbering system resulting in "catch all" files. On balance discreteness in a classification system is to be preferred to generality.

3. Archival Control

The discreteness of the classification system ensures archival control at file creation. A cull number is allocated when the file is opened. This number relates to the number of years the file is to be retained in the system. Under the keyword indexing system, it is possible to determine the cull period when the file is created, to the time of file closure by ensuring that all material of policy nature, for instance, is separated from housekeeping or procedural material. Policy files are retained permanently and the procedural files are only kept for the nominated period of perhaps three years. The creation date of a file is entered into the computerised master index and as a result a hard copy disposal listing can be produced each year.

4. Staff Training and Development

Unlike some classification systems which are difficult to understand (usually because of the inconsistent additions through the years), but very simple to operate (eg. title a file "Finance, General" and place all financial correspondence, which cannot be classified in the other finance areas in the classification scheme, on that file) the

keyword system is easy to understand and to operate. To train staff on the principles would take a little more than an hour; to train an experienced classifier may take about a year, because of the specialised nature of the correspondence.

Education institutions, like many organisations, tend to receive cyclical correspondence, with certain types arriving at certain times of the year, eg. enrolment material, research grant applications, conference requests, etc. For classifiers to experience the various types of correspondence which arrive at an educational institution they should spend a year classifying documents. Once a person is trained in the system about 98% accuracy in document retrieval is assured and that means out of every hundred pieces of correspondence, Central Records staff can guarantee to find 98 of them given only the subject of the document. This eliminates the need for a "mark in" register for correspondence as the classification system is so discrete that it acts as this control.

Records Office staff require extensive experience in the classification of correspondence and for this reason staff turnover should be low to maximise the resources spent on training personnel. Staff morale must be established and maintained at a high level in order to ensure that staff will remain in the records area. Traditionally, records offices have been the dumping ground for staff which were not wanted by any other section in the organisation or for young trainees. Anyone who displayed an ability was quickly poached by other departments. Staff within the records area were not slow to realise this and it reinforced the attitude that they were the lowest in the administrative pecking order. These problems were prevalent at the University of Western Australia and they were aggravated by archaic indexing and filing procedures. Staff morale was understandably low when the new system was introduced and it was a traumatic experience for staff to cope with the new

procedures and an increase in user enquiries about the system. Training sessions were

established for Records Office staff and when these ceased weekly meetings replaced them. These meetings provide an opportunity for staff to talk informally about the advantages and disadvantages of the system and to suggest ways of improving it. The Records Office clerks and clerical assistants operate procedures at base level and they are an invaluable source of information and inspiration. The keyword system at the University of Western Australia is only effective because the staff feel responsible for the success of the system which they operate. It is a tremendous team effort and the meetings, which are unstructured and informal, encourage everyone to see not only their part in the team, but the part played by other staff members and morale has soared as a result of holding them. The more confident the Records Office staff become in operating the system the greater their job satisfaction. Users are reassured of the success of the system and have come to see the records area as a vital and interesting part of the organisation. The poaching of staff from the Records Office has not ceased, but the staff themselves now turn down offers to work in other departments and a stable team spirited staff who can operate the Keyword system with confidence and skill is the result.

5. User Education

User education is of prime importance in records management as any user system is only as good as its users. If they fail to operate the correct procedures a breakdown in the flow of information is the result. Breakdowns are usually caused by lack of understanding of records management procedures. At the University of Western Australia training sessions were held for administrative staff, at all levels, well in advance of the system going "live". At these sessions users were instructed on the keyword indexing method and how they could access information using their own VDU screens.

Since the system was implemented some enhancements have been made to the computerised procedures.

Updated training sessions will be held for users over the next few months. Careful monitoring, by Central Records staff, of users' use and abuse of the system soon show where the problem areas lie. The Records Officer then approaches the users to assist in solving these problems. At no time have users ever shown any resentment at being told of their misuse of the system as they realise that the information flow can be strengthened if all users follow correct procedures. It is now Records Office policy that all new members of administrative staff receive a training session from the Records Officer at the outset of their period of employment. This has prevented a great deal of misuse of the system which otherwise may have occurred.

Conclusion

In conclusion, the keyword method has many advantages, but it is not without its problems. These problems can be solved if strict controls are established at the outset. The method is not dependent on memory, but on a logical scheme which is operated by well trained personnel. The above outline of the University of Western Australia's operation may be of some value to any organisation which is considering using the keyword system and it may assist them in avoiding some of the pitfalls in the initial stages of its implementation.

Appendix 1

THE UNIVERSITY OF WESTERN AUSTRALIA

1.

1 ACADEMIC ACTIVITIES

Des. = Descriptor

1st Des. 2nd Des. 3rd Des.

Centres: 001	Policy of Excellence	Policy Submissions. Specific Environmental Fluid Dynamics Centre for
Senate 002	List Specific Projects	Water (Civil Eng/ Research Botany) Centre for Fine Arts.
Special Projects		NCRRE (Education) National Centre for Research on Rural Education University Archivist

Triennial Submission 003

UDF 004	Gifted and Talented Childrens Development Fund)	Prehistory Centre for Zoology Professor in Marine Science Botany Organic Chemistry Civil Engineering, Geology Zoology - Shark Bay Marine Science Programme
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1.2 COURSES

1st Des. 2nd Des. 3rd Des.

Assumed 001

Bachelor 002 Specific By Degree

From the Classification Manual for General Files

Appendix 2.

UNIVERSITY OF WESTERN AUSTRALIA

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PRIVATE VEHICLES, PARKING OF

PRIZES*

Rewards in the form of money, books or the like to students on the basis of results in annual examinations; also for essays, compositions, etc.

It should be noted that the nomenclature of certain prizes and scholarships is confusing. Where a "prize" is really a scholarship index it according to its official title as shown in Calendar but clarify by adding in brackets the descriptor "scholarship". (And vice versa.)

NT POLICY
VALUE
SPECIFIC PRIZE

RT AWARDS
BURSARIES
SCHOLARSHIPS
STUDENTSHIPS

PROCEDURE

UF ARRANGEMENTS

Standard method of operating laid down according to established policy.

Use as a descriptor after subject.

PROCEDURES MANUAL

Step by step guide to policies of a department or guidelines of how to apply policies established.

Use PUBLICATIONS - PROCEDURES MANUALS

PROCEEDINGS

Use as a descriptor after subject, usually organisations, foundations, etc. to classify record of events at regular meetings. The narrower descriptor AGENDAS/MINUTES or MINUTES can be added as required.

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- Security cleared staff
- Air-conditioned fully alarmed delivery vehicles
- Unique security storage coding system

DOCUMENT STORAGE

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- Fire and theft security
- Fast retrieval service
- Coded security system
- Storage boxes/containers for office use

SECURITY
DESTRUCTION

- Collection of confidential material
- Sealed bags/containers for transport
- Fully enclosed security vehicles
- Selection of destruction method
- Supervised destruction under security conditions

Records Management at the Crossroads: professional education in Western Australia

Christopher Coggin
Education Sub-Committee Convenor

Records management in Western Australia has seen some significant developments over the last three years or so. The production of this issue of Informaa Quarterly in Western Australia is testimony to one of them, namely the formation of the Branch of the RMAA in this State.

But other developments have occurred outside the direct intervention of the Branch. So far they have manifested themselves in the public sector in particular.

What are these developments, and what has caused them?

Briefly, they can be summed up as technological and attitudinal. The latter has been a response to the former. This is admittedly a simplistic analysis of the situation, and no doubt there are other important factors that could be identified and discussed. Nevertheless, it is hard to avoid the conclusion that technology, as in many other aspects of society today, has forced the pace.

Technological

About two-and-a-half years ago, the Public Service Board introduced middle and senior State civil servants to RMS, an integrated records management system designed to rationalize and automate traditional Government registry procedures.¹ More recently, at another public-funded institution, the University of Western Australia, an equally sophisticated computerised system has been implemented.² Several other Government departments have since taken up automated records management systems, and it is logical to accept the proposition that the private sector will be following hard on the heels of those initiatives.

Records managers, librarians or computer specialists?

Attitudinal factors can best be examined against the analogous background of the library profession. The proliferation of computerised library systems has led to the emergence of personnel qualified to administer them. These people are qualified either by formal education of specialized training; often both.

The advent of increasingly complex records management systems, along with appropriate computerised backup, makes it inevitable that a similar sort of expertise will be called for in the recruitment of people needed to manage registries. While this expertise may not be a pre-requisite for all levels of registry management, it will certainly be an essential element of the professional background required to administer senior managerial situations into which these computerised systems are being introduced.

Attitudes

This leads to an assertion that traditional attitudes to the staffing of registries in this State have been questioned at policy level. The changing technology will force that questioning process to continue

Practising records managers at various levels have found themselves re-examining their roles and career prospects in the context of these changes. In a sense, these people are at the crossroads - in the one direction prospects are horizontal; in the other vertical. Vertical prospects in this climate look rosier for those with the peculiar qualifications and/or experience which have emerged relatively suddenly as prerequisites. As S. Hill recently put it: "Education

supports our role in the information age; without it, records management may well find itself in the back room doing the washing up."³

The Branch's approach

These factors, and others, have all been of concern to the WA Branch, who see the urgent need for educational facilities to be created which will provide

(a) basic records management qualifications (certificated) for those people not requiring advanced expertise; also for existing records management practitioners needing to gain formal qualifications.

(b) graduate qualifications for those wishing to move into middle and senior management positions either as records managers per se, or as "managers" in broader terms where knowledge of records management will enhance their efficiency.

Actions speak louder than words

This theoretical framework, however simply expressed, still leaves a vacuum in practical terms. The business of getting courses off the ground has not been easy in this State. It is still very much a live issue as opposed to an accomplished fact.

The Branch's Education Committee has formulated several draft syllabuses to meet the identified requirements. In so doing it has drawn on the experience and information offered by other RMAA branches in Australia. Acknowledgements and thanks are extended to those who have assisted in this way. The proposals are as follows:-

(b) The graduate course
It is hoped to introduce this at the bachelor level through the School of Management of the Division

of Business and Administration of the Western Australian Institute of Technology (WAIT). If the Branch's bid in this direction succeeds, people will be able to undertake a course which could result in their obtaining a Bachelor of Business degree with a significant content of records management.

Because negotiations with WAIT are still in hand, it would not be prudent at this stage to outline the syllabus being proposed. What can be revealed, however, are the objectives of the course. At the end of three years graduates will be able to

1. understand the function and range of information and records systems;
2. understand and apply the principles by which

information and records are organised and accessed;

3. design, implement, and evaluate information and records systems within an organisation context;
4. retrieve the information contained within these systems for decision-making and research;

5. understand and apply management principles and practices as they relate to information and records systems;

6. develop a conceptual and practical understanding of the application and use of appropriate technology in information and records management;
7. communicate effectively within and across organisation structures;

8. acquire an understanding of the implications of legal and financial factors impinging on information and records management systems.

(a) The certificate level.

In this case the Education Committee hopes that it can build upon the fact that there is a course in records management offered by the Division of Technical and Further Education (TAFE) of the Education Department. The Branch would like to be able to endorse the course (probably in an adapted

form so as to ensure that the syllabus at all times would reflect new developments) and thus to back it professionally as an accredited qualification.

In this way the needs of both industry and personnel are likely to be satisfied in a progressively-enhanced employment and training cycle

Fast forward for Librarians

Earlier in this article, mention was made of the records management/library profession interface. This aspect has not been overlooked, and advantage has been taken of the opportunity to hold discussions with the head of WAIT's Department of Library and Information Studies to explore points of overlapping interest. Such contact is essential, and will always be so, in the ambivalent climate of information management as it looms today.

WAIT's actions in this climate have been decisive and swift. As from 1986, would-be information professions taking the Graduate Diploma in Information and Library Studies at WAIT will have the opportunity of including an element of records management in their studies. This means that there will be a growing number of librarians trained in this State with a basic grounding in at least one phase of the records management cycle. Added to their "conventional" library expertise, this formal training will provide a most useful second string to their professional bow. The aims and syllabus of the archives management unit appear on Appendix 1 of this paper.

The cause of records management can only benefit from this. It is generally acknowledged that there have been instances in the past, in Australia and overseas, where librarians, thrown into the deep end of registry management, have had to sink or swim. With the WAIT qualification behind them, those two options will be narrowed by half. And in the right direction.

References

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2. "News Notes", Archives and manuscripts, v. 13, No. 1, May 1985, p. 86
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Acknowledgements

To various colleagues in the field of records management whose comments have been most useful. I similarly acknowledge my debt to Dr Patricia Layzell Ward for constructive exchange of ideas. My particular thanks are due to the other members of the Education Committee, viz Maggie Exon, Vivienne Lorrigan and Marita Hoo, without whose hard work the draft syllabuses would not have been compiled.

APPENDIX 1

ILS-516 ARCHIVES MANAGEMENT

Department of Library and Information Studies

3 hours per week

Pre-requisite: completion of first semester units 20 credit points

Pre-requisite: completion of first semester units.

Tuition pattern

One hour lecture, one hour tutorial and one hour in laboratory per week.

Aims

At the completion of this unit the student should:

1. understand the terminology of archives;
2. be aware of the process of acquisition of different types of records and legal considerations;
3. understand the application of the principle of provenance and the problems of physical arrangement;

4. be aware of how to produce finding aids;

5. have considered the access to, and use of archives and records;

6. appreciate the problems of conservation;

7. have reviewed the impact of information technology.

Syllabus

The terminology of archives management. The process of acquisition - legal and physical problems. The importance of appraisal and evaluation of future use of records and the selection process. The application of principles of arranging archives. Producing finding aids and user services. Conservation of materials. The impact of IT upon archives management. Archives collections in W.A. and Australia.

Textbooks

Jerkinson, H. A manual of archive administration. 2nd ed. London: Lund Humphries, 1965

Schellenberg, T.R. The management of archives. New York: Columbia University Press, 1965.

Assessment

Tutorial exercises	30%
Assignment	70%

Cont. from p. 2

Australia. These informal meetings over coffee, during breaks in workshops, at lunch and at the end of the day provide continuous opportunities to exchange ideas, to pick up successful solutions from others, to absorb the experiences from veterans in the records management field, to see and compare equipment on display, and to question suppliers and their technical people.

Discovering New Directions

It is all a process of education, of stimulating one's thinking, of discovering new directions, and of keeping abreast of the fast-moving pace in the records management field.

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Most people return from conventions with at least one good idea which they can put to immediate and practical use in their operations. They also agree that it only takes that one new piece of information to more than pay for the time and effort of attending these annual conferences.

Like other professional people in law, accounting, medicine and engineering, successful members of the records management field are aware that their futures and the futures of their own operations depend upon the information which they are able to acquire, absorb and put to good use. And that continuous search for information is what keeps them coming back to conventions year after year.

Exhibitions are Educational

The exposition with its numerous exhibits of the latest equipment is a veritable source of information for users and suppliers alike. As they walk through the aisles of records equipment, users can stop and chat with suppliers about

company policy, service, delivery, availability of parts and new applications. It is an opportunity for users to make contacts with companies with whom they do business so that they will know just who to call whenever there is a problem of any kind. The friends one makes on the floor of the exposition can be invaluable contacts throughout the year when users are some distance from suppliers and need immediate attention.

Suppliers too, profit from the face-to-face encounters with their dealers and users. It is an opportunity to learn what products are most popular and why, who uses their products, what new unusual applications have been developed by imaginative users, how the product stands up, what new features might be added to improve the product's performance, whether there is a genuine demand for new products still on the drawing board, how products stack up against the competition, what buying plans users and dealers alike have for the coming year.

Communications

One of Sir Avri Parbo's favourite stories about communication is published here by permission of the Sunday Times, Perth.

Halley's Comet is about to reappear in our skies and the general manager of a large factory has sent the following memo to the factory manager for dissemination down the line.

"On Friday evening at approximately 5 pm, Halley's Comet will be visible in this area, an event which occurs only once every 75 years. Please have the employees assemble in the area outside the factory, in safety helmets, and I will explain this rare phenomenon to them. In case of rain we will not be able to see anything, so assemble the employees in the canteen and I will show them a film of it."

Factory Manager to Assistant Manager:

"By order of the General Manager, on Friday at 5 pm. Halley's Comet will appear

above the area outside the factory. If it rains, please assemble the employees in safety helmets and proceed to the canteen where this rare phenomenon will take place, something which occurs only every 75 years."

Assistant Manager to Personnel Officer:

"By order of the General Manager in safety helmet at 5 pm on Friday the phenomenal Halley's Comet will appear in the canteen. In case of rain in the area outside the factory the General Manager will give another order, something which occurs once every 75 years."

Personnel Officer to Foreman:

"On Friday at 5 pm the General Manager will appear in the canteen with Halley's Comet, something which happens every 75 years if it rains. The General Manager will order the comet into the area outside the factory."

Foreman to Employees:

"When it rains on Friday at 5 pm the phenomenal 75 year old

Bill Halley, accompanied by the General Manager, will drive his Comet through the area outside the factory to the canteen."



No I'm sorry Mr McCartney, we don't seem to have the Beatles records.

Books and Records Management

Over recent years Fred V. Diers, CRM, has been writing comprehensive book reviews for the ARMA Records Management Quarterly. In his final article prior to taking up the position of President of the ARMA he writes of his frustration at the dearth of publications that reflect the role of the records manager as a professional manager in the corporate structure. He considers that only two books adequately project the desired image. They are Productivity and Records Automation, by Kalthoff and Lee and Information and Records Management, by Maedke, Robek and Brown.

As I have recently perused a number of publications in connection with formatting courses in records management I can only but agree with him.

One other book to rate a special mention from Diers is Handbook of Records Storage and Space Management, by P. Waegemann, which covers hard copy systems, equipment evaluation, cost management, microfilm, computerization and records management's roles in it all. It is a worthwhile little book although orientated of course to the North American scene. Its nearest Australian counterpart of which I am aware is the NSW RMO's tenth publication on records management entitled Records Storage Information Handbook.

Marita D. Hoo

Bibliography of Records Management

Anthea Love, University of Western Australia Records Manager, has compiled a bibliography of material available on records management through the W.A. State Library Service.

Copies are available from the W.A. Branch, RMAA, for a cost of \$3.50 to cover copying and postage.

Librarians and Records Managers - Birds of a Different Feather?

Maggie Exon

Hon Sec WA Branch RMAA
Library & Information School, WAIT

It is fairly common to see advertisements for records managers or records officers which mention qualifications in librarianship as either necessary, or more commonly, desirable. The possibility of being passed over for a job in favour of a newly graduated librarian is frustrating for the experienced records officer

with little or no formal training. The immediate reaction of many to such a situation is to close ranks, assert forcefully the unique skills involved in successful records management, and be fairly unsympathetic to requests from librarians for professional membership of the RMAA. A discussion of this problem brings up many fundamental issues such as the nature of professionalism, the place of professional associations in the modern world and the breaking down of barriers between traditional skilled jobs caused by the information technology revolution.

Why should employers consider librarianship qualifications worth mentioning in an advertisement for a records management post? The basic reason is simple. Such qualifications at degree and postgraduate diploma level exist, are well-established and widely accepted. There are a large number of library schools and a system of accreditation which ensures the maintenance of standards. The feeble attempts to emulate this situation in the field of records management have so far had little tangible result.

There have throughout the twentieth century been intense arguments about the validity of vocational degree courses, in which a substantial proportion of the time is spent acquiring practical skills with little intellectual content. Learning on the job seems, on the surface, a much more reasonable way of acquiring such skills. The increase in vocational degree courses which include periods of practicum would seem

to support this view. However this is to misunderstand the purpose of such degree courses and the practicum element within them. The major objective of librarianship degree courses is to teach the general principles behind individual systems of information management, how to evaluate user need and how to evaluate critically the performance of such systems. Periods of practicum not only give the student some idea of the realities of working in the profession but also provide raw material for such evaluation. The skills which are taught are above all transportable, equally useful whatever kind of library the graduate ends up in. There are, of course, all kinds of opportunities here for arguing whether the library schools actually meet these objectives, but this would be a red herring. There is plenty of evidence that in general employers are reasonably satisfied.

Another reason employers considering library school graduates for records management jobs is the inclusion of elements of records management in librarianship courses. This may take the form of a complete stream in records management, or the widespread diffusion through all units of the idea that all forms of records, not just traditional library materials, are being considered. Certainly the prevailing party line at

library schools, so heavily promoted to students that it might almost be called propaganda, is that graduates will be capable of a very wide range of jobs in the field of information, including records management. In part this can be seen as an admirable attitude. In many cases library schools have been in the forefront of recognition that modern technology has blurred for ever the clear distinction between the "record" and the "book/serial". Business courses, especially those such as the Western Australian Institute of Technology, which teach a common first year to all students, have little time to consider such problems. Courses in "information management" or "information technology" which are based in computer studies departments are too concerned with hardware to give much attention to the contents of information and the part the information plays in the functioning of a living organisation. The motives of the library school are also practical. They want their graduates to have the widest possible job opportunities, and they also want to attract a different class of students than those who have been traditionally drawn to librarianship.

A third reason for employing librarians in records management posts comes from the influence of certain employing organisations who have been

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seen as forerunners in the field of information management. These employers have seen that the dividing line between traditional library functions and traditional records management functions has been breaking down. In a desire to have an overall information strategy within the organisation, the two functions have been merged. Often it is the librarians who have retained the overall control in such mergers, partly because they tend to be more highly qualified and have been sustained by lively development in the last few years in the whole field of special librarianship. In practice this merging of functions has sometimes resulted in greater strains than may have been foreseen.

These developments have raised a number of interesting questions. Can those who have had some element of records management in their professional training claim in any real sense to be qualified in records management? What skills and knowledge do records managers need which are not covered, and are unlikely in the future to be covered, in a general library studies course? Are there any elements in the training of librarians which make them insensitive to the needs of good records management?

Librarians, despite all the developments in information technology, are still basically being taught about books and more modern forms of information carrier which still have the same characteristic of books. These are produced in editions of a number of identical copies. They have relatively fixed titles and once they have reached the hand of the librarian can be described in a standard format. Most of the thrust of modern development in librarianship has been to foster cooperation locally, nationally and internationally between libraries to share their standard records, and thereby share the information contained in the documents concerned. The documents are fixed, unchanging and therefore inherently controllable. The reason why serials have always produced particular problems for librarians is that they are necessarily incomplete and tend

to change over time. The provision of library networks such as the Australian Bibliographic Network (ABN) and specialised databases such as the Environment Information Center's Energyline has had a revolutionary effect on the library profession and, quite rightly, library schools place great emphasis on this area of study.

The temptation for a graduate trained in this aspect of information management is to reduce records to a format in which they can be treated as much as possible like books, and then proceed to do just that. When the records, and more importantly those who generate and use them, fail to fit in with the pattern, all kinds of problems can result.

The aspect of good records management which seems most lacking in general library school courses is an appreciation that the organisation comes first, and that its records merely reflect the functions and structure of the organisation. There is no time to teach general business management, office management and organisational structure. On a more mundane level such vital matters as record storage, scheduling, file structure and so on, present essentially different problems to the records manager than those faced by the librarian. It is not to demean the profession of librarianship to say that an organisation's library is a resource of the organisation, but its record system is inextricably bound up with the daily functions of the organisation itself. Any system imposed from outside by an insensitive librarian would be likely to ignore this essential relationship.

Later in this article I hope to show that there are things which records managers could profitably learn from librarians. But I hope at this point that I have been able to show that there are essential differences between the two professions, and that records managers may be losing out because of lack of tertiary training in their area. However tertiary education is merely part of a much wider problem, that of being recognised as a profession at all.

It is very difficult to define a profession, although it is generally accepted that the word profession implies more than merely occupation. The Macquarie dictionary uses the words "requiring knowledge of some department of learning or science." However it is not enough that a group of people should profess to have such knowledge. It is also necessary that the general public, and in particular potential employers, should recognise that the profession exists. If there is no such recognition it is also likely that the employer does not recognise the need for that task to be performed in the organisation at all. Records managers have a two-fold problem, to convince the employers that they need someone to do a particular job, and then to convince them that there is a special body of people trained to do it. This convincing is part of the job of a professional association, the forming of which has historically proved very important to the establishment of a profession. Records management already has its professional association. As a basis for deciding what policies it should adopt to establish firmly the profession in Australia it would be helpful to look at the history and achievement of the Library Association of Australia which has a much longer history.

The Library Association of Australia (LAA) has concerned itself over the years very closely with the task of establishing librarianship as a recognised profession in this country. It has established what knowledge and skills a librarian should have, and what tasks a librarian should be expected to perform at work. In the absence of tertiary examinations in librarianship, the Association ran its own. Those who completed the course successfully were registered and acquired the right to letters after their names. The individual librarian only retains this badge of recognition if he or she continues to pay increasingly heavy annual membership fees. There is logic in this, since it is assumed that members will take advantage of meetings, conferences and courses organised by the LAA and therefore continue to keep

their knowledge up to date. Of course, there is no way of ensuring this, and a number of professional associations have been considering how compulsory continuing education can become part of their recognition procedure.

Eventually tertiary courses leading to non-LAA qualifications were established. The LAA retained the right to accredit such courses and decide if they could lead to full professional membership of the Association. Such qualifications remained whether membership continued or not, and advertisements began to appear which asked only that applicants were eligible for professional membership of the LAA. This has led to a crisis of membership. There is no longer the compulsion to belong, the right to put letters ALAA after your name has lost its significance, membership figures have dropped and inflationary pressure has been put on membership fees. The suggestion has been made that full membership of the Association should be open to anyone in any of the information professions who expresses an interest, without the sheep and goats process of awarding various grades of membership. Accreditation of courses could be left to government accreditation agencies, avoiding the costly and time-consuming duplication of accreditation which happens at present.

Another strain on the LAA has been the development of courses in library studies at less than degree or post-graduate diploma level. The grade of library technician has been recognised by the LAA but there has been a continuing debate over which tasks are suitable for technicians. During the present shortage of jobs, many professional librarians have been taken on for advertised technicians jobs. This is frowned on by the Association and has caused additional strain. The question of "para-professionals" and the worth of courses at less than degree level is one which is being debated in a number of professions and will have to be faced by the RMAA if courses at TAFE level are continued and further developed.

None of the above should be taken as criticism of the part that the LAA has played in establishing the profession of librarianship in Australia. It has worked tirelessly at the maintenance of educational standards. It has monitored job advertisements to ensure that pay and conditions are appropriate. It has promoted the cause of libraries to government and the private sector. However it is possible to argue that the task of the LAA has been much easier than that which faces the RMAA. Although the users of the public library may think that the librarian is someone who stamps books, there is a long tradition in academic institutions of the librarian as an educated man and scholar. That libraries have worth and deserve support is also well established. No such tradition underlies the record keeping of most organisations. In many cases there is still no proper system and no overall direction. Records and files are seen as a province of secretaries and filing clerks. Despite these differences there is much we can learn from the experience of bodies like the LAA in planning the future work of this association.

It seems obvious that education is the key. Unless there is a body of identifiably qualified people in the field of records management there is little we can do to influence employers. This is not to disparage the work for the profession being done by associates of the RMAA who were elected on experience rather than educational qualifications, but paper qualifications have, unfortunately, a disproportionate influence in the world of the eighties. Our need is to ensure that good courses in which records management is the core are established. An alternative is to establish records management as substantial elective streams in business or information management courses. The position of existing and proposed TAFE courses also needs to be considered. It is essential that all branches of the Association cooperate to ensure that courses are reasonably consistent in content, level and standard. Also there needs to be careful consideration as to which

grades of membership of the RMAA are open to those who have completed various courses. This will involve the Association in a consideration of the definition of "professional" and "para-professional" in the field of records management. In the establishment of courses branches will need to work closely with employers and state accreditation bodies. Although there is no question of the RMAA setting itself up as an examining body, it should be heavily involved in the accreditation process. This should however never involve a dual accreditation process, such as library schools still have through the LAA and government agencies.

Obviously the Association is involved in active promotion of its activities to potential members at present. Once a reasonable number of students have passed through qualifying courses this promotion may become more specific, particularly the monitoring of job advertisements. This is the most rewarding way of countering demands for inappropriate qualifications and the offering of inadequate conditions of service. Less easy to monitor are internal appointments which never get advertised.

There are bound to be some problems in a transition period from experience to paper qualification as the major route to a career as a records manager or records officer. Some members of our association may feel that they will be adversely affected. However it is surely better to see preference being given to qualified persons in one's own field rather than those qualified in a different profession. To ensure complete fairness, provision should be made for part-time or external study in all levels of courses. In the present economic situation this may be an unobtainable goal but it should at least be kept in mind. Also in this transition period it is important to continue with the associateship and higher levels of membership as recognition of expertise in records management. To establish a profession it is necessary to retain some exclusiveness in professional association membership. This does not

preclude welcoming all those interested in becoming affiliates, but we have by no means reached the stage of the LAA where it has been quite seriously suggested that all members should be equal. Experience in records management should still be one route to associateship but the conditions are in need of some revising, and this revision should be continued as new qualifications are introduced.

Much of what has been said here suggests that the profession of records management should emphasise its special skills, and remain somewhat exclusive, in order to become established. In particular the distinction between librarianship and records management has been emphasised. None of this is to suggest that the two professions should shun each other. Cooperation between all professions caught up in the so-called information revolution can only be productive.

Telecommunications, computers, micrographics are all involved in database management, and it is the general concept of database management which links records managers and librarians. Having asserted earlier that many of the techniques of librarianship are inappropriate to records management, is there anything which the members of the RMAA can learn from librarians?

I believe that it is in the field of information retrieval, particularly by subject, that records managers can learn from librarians. The latter have always appreciated that any order imposed on the physical carriers of information can only be linear. In bringing together documents because of certain common factors, you are inevitably ignoring other relationships which would place them elsewhere. Library catalogues provide a large number of access points to documents which are not brought out by the order on the shelf. The forms of names, used for persons and corporate bodies are carefully monitored, and above all a controlled vocabulary is used for subject access. There is a huge body of theory available as a basis for the construction of specialist subject heading lists and thesauri. Some of

this theory has been by-passed by the ability of computers to do keyword searching, but the basic concept of a controlled vocabulary with a clear indication of the semantic relationship between terms in the vocabulary is still central. File titles should be consistently chosen from the controlled vocabulary. Without careful control of the subject access to records it is inevitable that there will be a low rate of recall of relevant documents when the records are searched. To the somewhat jaundiced eye of a librarian it seems that records officers have always been far more concerned with the safe and tidy storage of records than with the content of documents and their possible future use.

The development of integrated library management software has enabled libraries to unify their record keeping so that information about the whereabouts and status of all documents is always available. Software packages designed specifically for records control are very similar and are often basically versions of library packages. The sophisticated retrieval methods used with such systems should enhance the usability of records collections.

Special librarians have been in the forefront of all these developments. They have developed an attitude to the service they provide which sees information provision as a positive rather than a reactive process. It is not a question merely of producing a document when it is asked for. Instead by working closely with others in the organisation they are able to anticipate need. Wasteful duplication of effort can result if the records of previous work are unavailable and ignored. Close cooperation with special librarians, particularly through the Special Libraries Section of the LAA could be very fruitful for the RMAA.

If this cooperation is to be achieved it is desirable that there is some cross-fertilisation of the membership of the LAA and the RMAA. Tightening up on the conditions of associateship of the RMAA may result in fewer librarians joining as professional members. However there is

still the grade of affiliate, and we should ensure that our membership fees remain as low as possible so as to encourage plenty of interest from those in fields closely related to records management. The LAA charges \$71 at present for non-librarians to join, which is a pity. The cross-fertilisation is likely to remain a one-way affair. This does not mean that we should fear takeover by librarians. A clear policy of the professionalism of records management will give records managers the strength to deal confidently with other information professions. In the present state of development of the "information society" there is no place for the building of barriers.

* * * * *

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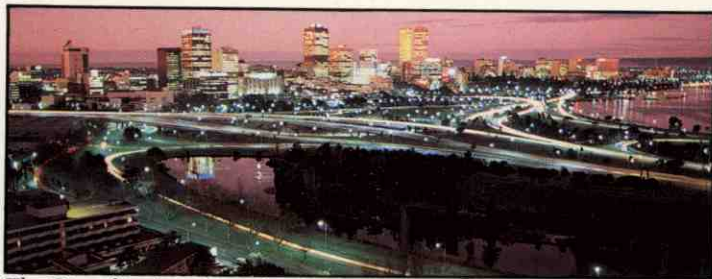
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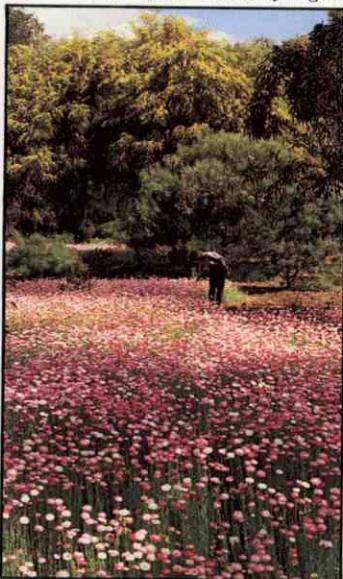
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