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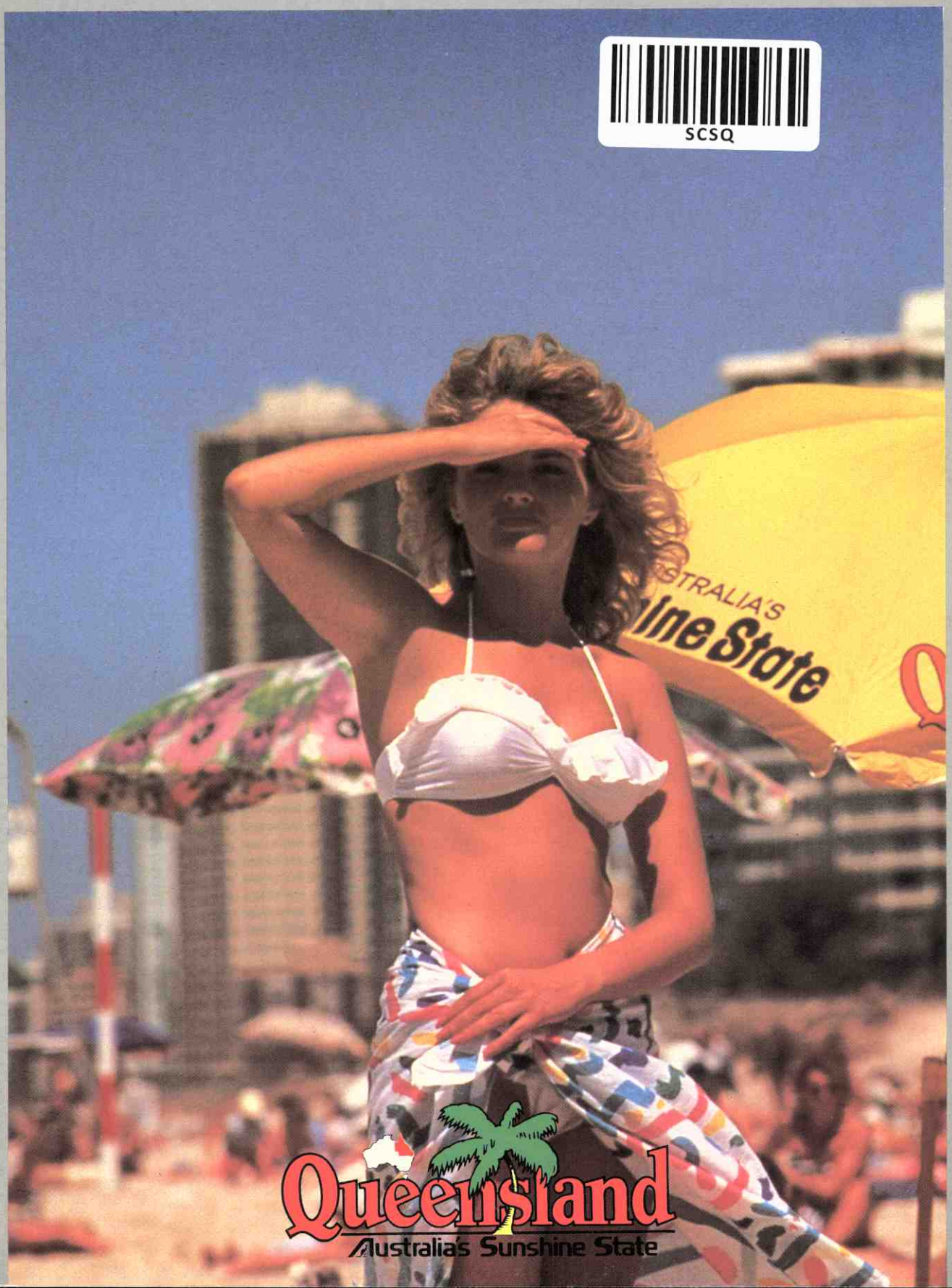

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EDITORIAL NOTES

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.

The opinions of the authors are not necessarily the views of the Records Management Association of Australia.

The May 1986 editon of **INFORMAA QUARTERLY** has been produced by the Queensland Branch. The publication co-ordinator is Murray Stewart.

Future issues: August 1986 - NSW Branch
November 1986 - VIC Branch
February 1987 - WA Branch

From the Federal President

By Peter Smith M.R.M.A.

"Where are you going to my pretty maid?"

A line from the nursery rhyme that is perhaps apt for records and information management at this time.

Are we really confident that the direction we are taking is the correct one?

Some time ago (two years to be precise) I was talking of future trends in records and information management, and where the records manager of the future would fit into the organisation hierarchy. I said it would not be the traditional role as we see it today.

The key to our future is an integrated office.

This means the extension of automated equipment to encompass an ever increasing number of office functions; computers, word processors, electronic mail, communication equipment with voice, text and picture being part of office intergration that is here to stay. Continuation of cost reduction will certainly support this trend.

I do not accept that the function of automation is an extension of electronic data processing and that it should necessarily come under the control and authority of the E.D.P. Manager.

Technology management and information managemnt as I see it are distinct and different disciplines.

Producing information is totally different in its application to the management of information.

It is my opinion that all the resources, Human, Information, Technology, Financial and Material, are all complementary and should function on an integrated basis of management.

There is a problem, however, that in specialising records and other media managers have a very narrow base for their skills. They will have to cross those organisational and technological boundaries if they are to become competitive in the widening information arena.

It is important for us to develop our skills, standards and performance as technology improves and expands.

Technology will force change whether we like it or not, therefore, if we do not wish to be left behind we must improve our technique and its application to the task ahead.

In identifying the resourcs within an organisation you will find each of the disciplines has an identified leader - except the information resource.

Most senior management assumes that by producing information the Systems/Technology managers are also managing it - this could not be further from the truth.

Records and information managers have the criteria, after all it is what we do best, no matter what the media it still remains as information to be classified, indexed, distributed, maintained and scheduled for disposal.

It would be foolish to think there will not be fierce competition from other areas for the position of Information Resource Manager, so the person within the organisation who best prepares oneself for the task of integrating all the specialisd disciplines will win the day.

It will be essential that all the disciplines have dialogue if the primary need of information management is to be supported.

The role of the information manager is an evolving one and as technology becomes more dominant within the organisation the task of the Information manager will become far greater than just protecting the corporate resource.

The evolution of office automation invites information resource managers to be actively involved in supporting the decentralised management of information . This requires an understanding of both the nature of office automation tools and the unique information requirements of individuals and groups as well as the organisation as a whole.

The fact remains that it is the user of the information who will dictate where, how and when change to the information resource function will take place.

Do you know where you are going to my pretty (information resource) maid?

Happy Anniversary Queensland

10 YEARS 1976 - 1986

By Murray Stewart A.R.M.A.

1986 marks the tenth anniversary of the Queensland Branch.

The following dates and events are highlights of 10 years of achievement through the efforts of many people.

To those people who have participated in so many ways to promote and foster Records Management in the Sunshine State, the present State Council say "Well Done" for establishing an invaluable vehicle by which to educate and inform organisations, management and individuals.

15th January, 1975

First meeting to discuss formation of a Queensland Branch

Mr Tom Lovett travelled from New South Wales as guest speaker and addressed the meeting, giving a history of Records Management in Australia.

This meeting took place at M.I.M. Holdings Ltd (Mount Isa Mines) with twenty-three people in attendance.

The joint convenors were Miss Burn Ford, M.I.M. Holdings Ltd and Jim Shepherd, Brsbane City Council.

Subjects for discussion were;

- The need for a seminar on Records Management
- Advantages of a Records Management Association in Queensland
- Formation of a Pilot Committee

20th January, 1975

First Meeting of Pilot Committee

The first meeting of the Pilot Committee was held at the Southern Electricty Authority Building. (now S.E.Q.E.B)

Membership of the committee was;

Jim Shepherd	Brisbane City Council
Harry Haxton	Commercial Archives of Australia
Frank Sparks	M.I.M. Holdings Ltd.
Neville Harsford	S.E.A.Q.
Allan Campbell	Sperry Remington

11th February, 1975

First Workshop Meeting

This event was held at the S.E.A.Q. Building, the workshop topic was titled "Retention Scheduling" and topic master was Harry Haxton.

Following the presentation, a problem clinic was held, which was to become a valuable platform for discussion on proposals and problems at subsequent workshops.

1st March, 1975

First Newsletter

Allan Campbell (Sperry Remington) was editor of the pilot publication.

The newsletter contained information on the decisions of the Pilot Committee and outlines of future events.

June, 1975

Donation of Funds

The Pilot Committee received a donation of $50.00 each from the New South Wales and Victorian Branches. These donations were of great assistance in the continuing struggle to form a State Branch.

9th March, 1976

Inaugral Meeting of the Queensland Branch

The following membership formed the first State Branch Council:

President	Jim Shepherd	Brisbane City Council
Vice President	Harry Haxton	Commercial Archives of Australia
Secretary	Bob Harris	S.E.A.Q.
Treasurer	Owen Cook	Chandlers Pty. Ltd
Registrar	Frank Sparks	M.I.M. Holdings Ltd.
Councillors	Allan Campbell	Sperry Remington
	Bob Brown	Redlands Shire Council
	John Brown	S.E.A.Q.
	John Gallagher	Channel 9 Qld
	Des Millican	S.E.A.Q.
	Paul Wilson	Qld State Archives.

20th March, 1976

Inaugral Dinner - Queensland Branch

Neptunes Restaurant Fortitude Valley, was the setting for this important function.

Guest speaker was Professor F.J. Willett, Vice Chancellor, Griffith University.

Professor Willett delivered a paper on "Information -The Life Blood of Management" and also presented the first Associate Certificates, on behalfr of the Federal Council, to Queensland recipiants.

21st September, 1979

Federal Annual General Meeting

Queensland became the first state to conduct a Federal A.G.M. in conjunction with a major seminar.

The Ridge Motel, Brisbane, was the perfect setting for this event and was officially opened by Sir Llewelyn (Lew) Edwards, then State Treasurer and now Chairman, Expo '88.

The topic of the seminar was "Productivity in Records Management".

September, 1984

First National Convention

Following many months of late hours and short tempers, the staging of the 1st National Convention took place at Greenmount Resort, Coolangatta.

The following people are to be congratulated and should look back with pride on a very successful convention. A bold step indeed, but one which saw our Association go on to greater heights:

Harry Haxton
Jim Shepherd
Barry Joyce
Greg Keane
Ted Clarke
Roger Radburn
Gary Whitehead

and not to be forgotten,

Tony Hobson, Hobson Convention Enterprises, and his staff for the excellent management of the Convention.

The title of the convention was "Intergrating Technology" and was officially opened by the Hon. M.J. Ahearn, M.L.A. Minister for Industry, Small Business and Technology.

This event saw the beginning of a new awareness of Records Management throughout Australia.

Folowing the convention, Queensland produced the first publication of the "Informaa Quarterly" under the editorship of Barry Joyce (then State Vice President).

Education

T.A.F.E. Course

Commencement of the course followed negotiation by Bob Harris and Jim Shepherd with the Department of Education.

Harry Haxton and Allan Campbell were joint lecturers until Allan was transferred interstate.

Harry has continued with assistance from Jim Shepherd, Barry Joyce, Clive and myself.

The first graduates in Queensland in 1978 were:

Gunta Bajars	M.I.M. Holdings Ltd.
Lisa Blahuta	M.I.M. Holdings Ltd.
Russell Fraser	Logan City Council
Gary Whitehead	Brisbane City Council
Jim Shepherd	Brisbane City Council

the natural progression of the course into the Correspondence School in 1984 has seen a cross selection of students not only from Queensland but across the country. Present enrolements total thirty-six students, half of which reside outside the state.

Undertaking the course has not only provided the opportunity for education but has given the association a market for membership recruitment.

The present Branch Council is comprised of either course graduates or students currently undertaking the course, with the exception of Harry Haxton, our lecturer.

Federal Council
During the last ten years, Queenslanders have held the following positions;
Federal President - Jim Shepherd, Harry Haxton
Federal Secretary - Harry Haxton
Federal Treasurer - Jim Shepherd

Time has now come full circle and it is with pleasure that the queensland Branch Council present the May, 1986, editon VOL2 No1 of our national Journal "Informa Quarterly".

The International Records Management Council and R.M.A.A.

By Peter Smith M.R.M.A.

Until recently our Association and the International Records Management Council (I.R.M.C.) had to all intent and purpose gone their separate ways.
The First International Records Management Congress has helped to change the position.
We now have a much clearer view of the aims and objectives of I.R.M.C.
The International Records Management Council, a non-profit educational Council, was founded in 1970 -
To promote and advance the profession of records management and related fields through education, research and study.
To disseminate professional knowledge, techniques and information through international sharing of experience related to records management and related fields.
To develop, improve and advance standards appropriate to the entire field of records and information management.
to convene, sponsor or promote conferences and meetings for the furtherance of Records Management knowledge.
To assist countries that do not have a Records Management Association in organising same, and give advice, information and training.
To contribute to the programs and projects of U.N.E.S.C.O. and other International and Regional Organisations.
These objectives are closely aligned to that of R.M.A.A.
With these objectives in mind I, with a great deal of support from Helen Francis and Graham Dudley, am attempting to structure a network with other countries, particularly the Phillippines and our nearer neighbours to foster a closer relationship in records and information management.
I envisage that we, with Government assistance, will be able to offer developing countries assistance by providing workshops, seminars, lectures and on-the-job training.
Our Association has experienced Records Managers who are willing to assist in the education of those in the field of records and information management from developing countries.
I am of the opinion after reflection on the Manila Congress that the area of greatest need is that of basic, down to earth, every day records management. If we can offer tangible help both in Australia or their own country the benefits are not so much for our Association but for records and information management as a whole.
Our prime objective is to promote records and information through education by sharing our experiences not only within our National Association but wherever there is a need.
It gives me, personally, a great deal of satisfaction that our Association has been drawn closer to the International Association with whom we should strengthen our ties. To my mind I.R.M.C. is the International Governing body with which we affiliate as should all national records and information Associations in the hope that concepts and standards will then become universal.

3RD RMAA NATIONAL CONVENTION 1986

Dates: 13 - 15 September, 1986

Venue: Sheraton Alice Springs
Phone: (089) 52 8000
Telex: 81091
The Northern Territory Government Tourist Bureau will be handling ALL accomodation bookings. Please refer to the NTGTB in your city.

Transport: Official carriers for the convention are Ansett. Please quote this reference when making bookings Ref. No. S3lqaf File No. ADL 0056

Trade Display: 27 vendor booths are available. For further information please contact:
Maurice Andrews
Trade Coordinator
Ph.: (08) 371 0222

Dinner: Official Dinner will be held at Chateau Hornsby, the only winery in Central Australia.

Papers: Speakers have been attracted from all member states and also overseas (Canada, UK and USA).
Some of the topics being presented are:
Computer Fraud
Changing role of the Records manager
Filenet - A Case Study
Correspondence Control Systems
System Analysis in Today's Office
Plan for Your Storage System

Costs: Registration fees are:

Non-member (paid before 7 Aug)	$295.00
Non-member (paid after 7 Aug)	$320.00
Member	$295.00
Day Registrant (per day)	$140.00
Accompanying Partner	$90.00

Full registration includes all official convention activities, am/pm teas, lunch/cocktail/official dinners, Cancellation of registration fee after 30 Aug will be $100 Per person.
For further information please contact:

Bridgette Kleining or Spiros Sarris (08) 269 3977, Helen Francis (After Hours) (08) 298 6627
or RMAA 3RD NATIONAL CONVENTION
GPO BOX 969
ADELAIDE SA 5001

News from the Territory

By Don Brech A.R.M.A.

A New Branch?

The formation of a Northern Territory Branch of the RMAA is now under active consideration by Northern Territory members.

This is seen as a positive and necessary step towards furthering the objectives of the Association and advancing the interests of members in the Territory.

What better time to establish the Branch than the year the National Convention is held in Alice Springs!

Existing and prospective members in the Northern Territory are invited to contact one of the following for further information:

Don Brech
c/- NT Archives Section
PO Box 1197
Darwin NT 5794

Ph. (089) 82 1261

John Hayes
c/- Department of Primary Production
PO Box 2134
Alice Springs NT 5750

Ph. (089) 52 2344

We also hope for the support of colleagues around Australia. Your comments would be welcome.

Federal Visitors

Federal President, Peter Smith, and National Convention Co-ordinator, Helen Francis will be visiting the Northern Territory in June 1986.

They will be presenting seminars on 'What is RMAA' in Alice Springs on Friday, 20 June and in Darwin on Monday, 23 June.

The visit should provide a valuable stimulus to awareness of records management in the Territory and encouragement to local moves to establish a NT Branch.

Is all the Red Tape Necessary?

By Clive Finter A.R.M.A.

The Trials and Tribulations of a Records Clerk in the Pursuit of Excellence.

When asked, two (2) years ago, to analyse and make some suggestions on how the fifty-seven (57) year old System could be updated and made serviceable to meet the pending demands of the 21st Century, and knowing that I would be responsible for running the Section for at least the next few years, what else could I say but "I'll have a go".

Little did I know then what I had just undertaken.

Mind you it probably served me right because I can remember making a recommendation that the System should be updated in the light of impending new demands.

As part of a large Government Department which has undergone vast organisational and technological change, the task of providing an efficient Records System lies partly in the present but mostly in the future. In the main the present methods of classification and indexing date back to 1929 and up until only recently have adequately met the demands placed upon them.

Such axioms as "a stitch in time saves nine", and "a bird in the hand is worth two in the bush" all seem to rear their ugly heads when we look closely at our Records Systems and find out just how much of what should be routine workflow is by-passing the System as a matter of expediency.

"To adhere to the procedures or go through all the red tape takes too long" has been a common complaint, so the new approach of "beat the System whenever possible" becomes the new standard.

Anyone with the rare combination of knowledge on Records Management and how Government Departments work will appreciate more fully my dilema. After nineteen years I had a prettty good idea of how the place ticked, but really, what was Records Management all about and how could I improve the System.

A few questions in the right place and a phone call to a Management Consultant who happened to be a member of the R.M.A.A. soon started the ball rolling in the right direction. Along with a fuller appreciation of the problems I now faced there were also new horizons in this field of employment, and with them a vision that one day there may just be a chance of creating a career in Records Management in the Public Service.

I once read, "If you can't give them anything else at least give them hope", so armed with hope, the full time assistance of another Administrative Officer and part time assistance of Officers from the Organisational Methods Branch we set about the task. But who knew anything about Records Management? The Queensland Branch of R.M.A.A. provided the answer and I soon found myself back at Evening Classes under the tutoring of Mr. H. Haxton doing the Records Management Course at Kangaroo Point T.A.F.E.

The Project progressed and so did the ideas of the Working Group as to what could be done in the short term and the long term to improve the lot of not only the System but also of the Operators and the Users.

Between the Working Group and top Management there was set up a body called the Steering Committee. If we could convince these people that what we were proposing was the best way to go, then that Committee would make such a recommendation to Top Management.

No doubt you have heard the saying, "If you want it done properly do it yourself; if you want it done later any old way, delegate; and the third option is form a Committee", well I can't say that this is what has happened in our case but this is where more red tape has a part to play.

As with any Government incentive that will cost money, there is a public expendable, then if for no other reason than self preservation, every effort will be made to make sure that the right decision is made the first time.

Tying the Knot

In sparing you the trauma of the period of Detailed System Design, our now commonly accepted proposal is to implement a Computer assisted Records Management System based on a hierarchical Classification Index supported by a Thesaurus for controlling Indexing Language. (If you don't understand this, please drop a line to the Editor).

Let me emphasise one very positive point to come out of this proposal taking so long to get approved. We have been speaking to so many people thoughout the Deparmtnet for so long about what we envisage for the new System, that they are now waiting just as eagerly as we in the Working Group are. To have the potential Users and Operators looking forward to the implementation of the system is going to be a big plus during the implementation phase.

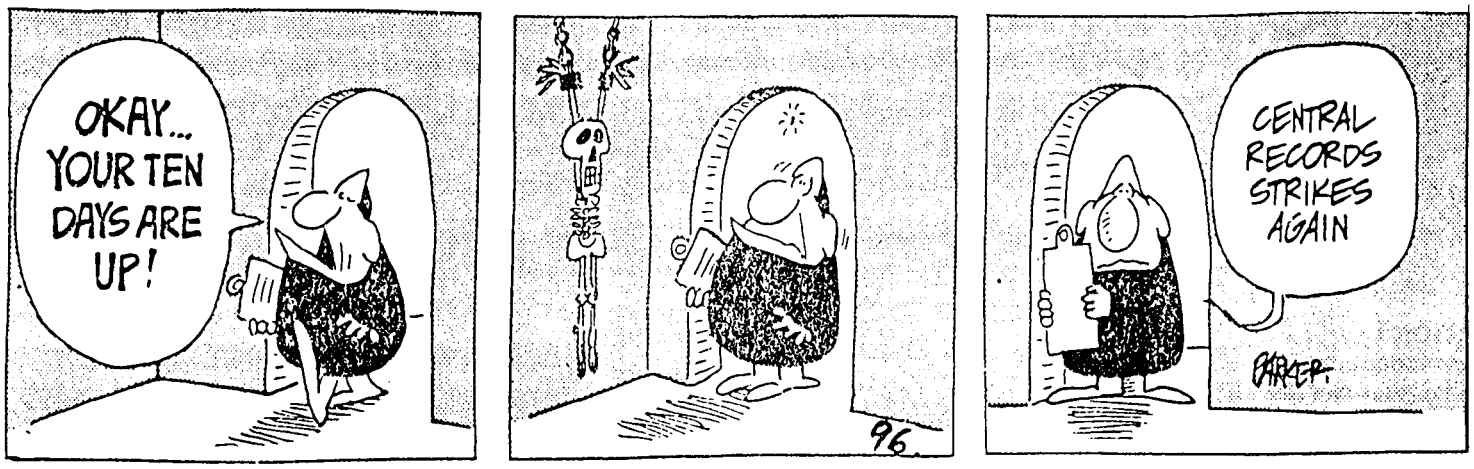
Of course there is always more red tape. In the Queensland Public Service there exists a body called the Computer Policy Committee which controls the introduction of any new Computing incentives, especially at a main frame level. So in the process of developing the desired System the Working Group became pro-active in influencing those concerned to re-prioritise the projects listed for strategic planning. The result of this has been the preparation of Specifications for the calling of Tenders for hardware and software to be let hopefully by the end of June 1986. With this phase of the project being in the Tender Call Stage you will appreciate why I cannot expand further on this aspect.

Just when and where a point approaching Excellence will be achieved cannot really be determined, but I am sufficiently optimistic that by December 1986 we will have an operational main frame computer solution for Records Management, not only for this Department, but any other State Department seeking a solution to their Records problems via Computer Assistance.

Red Tape! To be or not to be. Will we allow it to dominate us or will we use it responsibly in making informed decisions? I am convinced that the answer lies in the principles of competent Records management.

To Have • The right Information

- In the hands of the right people
- At the right time
- At the lowest reasonable cost.



Disposal of Records, What To and Why

By Denis Godfrey J.P., A.R.M.A.

Why dispose of them at all? Why not keep them, we may need them. That is the cry is it not?
One good answer is SPACE. We are running out of it; there is nowhere to put our new files. Another is TIME. The time we waste looking through a multitude of files (old and new) to find the one we want. TIME is MONEY, wasted time is wasted money.
What we need then is SPACE and SEPARATION. Space to put new (current) files. Separation, to separate the current (active) files from the older (Inactive) files. That is what Disposal (Retention) schedules are all about, are they not?

A Disposition or Retention Schedule is:-
A Document, governing on a continuing basis, the Retention and Disposition of a Recurring Records Series, in an organisation or Agency.

It should Indicate to the Reader:-
(a) How long it (the record) should be kept, prior to destruction.
(b) Where it should be kept, during its various Activity Stages.

A Record Series is:-
A group of Documents filed together, in a unified arrangement, which results from or relates to, the same function. e.g. Requisitions, paid cheques, building Regns. 'modus operandi' records in the Police Department. (i.e. Similar Records Uniformly Filed).

Activity Stages are:-
(1) Active Records: Those with high admin value, and those which are required to run your day to day activities.
(2) Semi-Active Records: Those which are not in current use, (one to three months since last actioned). The actual time slot depends on the function or departmental requirements. These should be transferred to a less expensive area and less expensive equipment, where they are still easily accessible but not taking up space needed for active records.
(3) Inactive Records: Closed off files, job completed, Vehicle sold, Claim paid, Road Demained etc. these can be stored in Repositories, either Inhouse or Offsite.

A Repository is:-
A place where records are kept (semi or inactive) until needed or transferred for destruction, or to Archives as an Archive.

An Archive is:-
A record of any organisation, Consciously Chosen for Permanent Preservation, and Held, Arranged and Described, by that Organisation, or its Legitimate Successors.

An Archives is:-
A building in which the Archive is kept.

Disposal
What do we actually mean by Disposal? (We do not neccessarily mean destroying it), what we do mean is Transferring it, from expensive Front Office space to Lower Cost Storage, with less expensive equipment. Transferring through the three Activity stages (previously mentioned) or to destruction. Depending upon the Retention schedule Instructions.
To do this we need to determine the "Date for Dispoal". This can be anyone of the following:

End of File Action	E.F.A.
Last Entry	L.E.
End of Calendar Year	E.C.Y
End of Fiscal Year	E.F.Y.
Semi-Annnually	S.A.
Bi-Annually	B.A.

Who and How?
Appraisal
The Appraisal of Records for establishing proper Retention Schedules, is the Responsibility of the Records Manager. Techniques include Establishing Values.

Values

(a) Administrative: need to the Organisation or Department.
(b) Fiscal: Required for Audit or required to be kept by law.
(c) Legal: Transactions, Deeds, Mortgages, Leases, Agreements etc.
(d) Historical: Research, Interest etc.

Appraisal has four Logical and Basic steps:-

(1) Define the Record Series (What is it and what is it not?)
(2) Describe the Series (Function, Content and Arrangement)
(3) Research and Analysis (Admin, Legal, Fiscal and Historical)
(4) Prescribe Disposition Instructions (Archival, Semiactive, Inactive, Destruction)

To do this it will be necessary to first carry out an Inventory of all the Records in the Department.
This Inventory will cover the four steps of Appraisal. One Records Inventory Form should be completed for each Records Series.
In the Public Service there are already some disposal authorities in force, check them out and take advantage of them.

The Records Inventory Form is:-

A listing of all Records in a Department, including a description of the important characteristics of each series. This listing is essential to the proper compilation of a Records Disposal Schedule.

The Inventory Form will:-

Provide a comprehensive listing of all records in the Department. Assist in the determination of the Value (appraisal) of the records. Define the function and Purpose of the records.
Reveal any duplication.
Highlight Inadequacies.
Help future planning.

The Form should include:-

1. Description of the Records
   Title, Dates covered, arrangement (Numerical/alphabetical), physical form (file microfiche, maps etc.),
2. Function of the Records
   Admin, Audit, Legal, Policy, Disposal authority, Archives Decision.
3. Suggested Retention Periods
   Department, repositories. How long in each.
4. Recommended Disposal Action
   Final disposal, Archives, Destruction, retain in office, or repository until etc etc.
   Using the information on your Records Inventory Form, you can now Determine the Disposal Periods, i.e. how long you are going to keep the record as an active record before you transfer it to Inactive or Semiactive whichever.

There are (generally speaking) two totally unacceptable Terms:-
(1) Indefinitely, all that means is that you cannot make up your mind.
(2) Permanently, if it needs to be kept permanently, then dispose of it by transfer to the Archives.

DETERMINATION OF VALUES

Administration Value

That is the value to the Department in carrying out it day to day activities, they are required whilst the job is still current; i.e. a Shire Road Building or Bridge file.
Whilst the road or bridge is still being built, the file is still required as active, when th job is completed and the final form 3 submitted, the file becomes inactive and should be disposed of by transfer to the Repository, later it may be transferred to the Archives.

Fiscal Value

Such as accounting files, needed for audit etc. Treasury Instructions give accounting disposal periods.

Legal Value

This value can be varied to a large degree, and depends upon the type of Legal Point, Right or Action, as well as the Branch or Department involved.
Laws, Regulations, Interpretations and Stated Cases, would be of Enduring Value to Legal Branches, Solicitors and Counsel.
Title to Real Estate and defining Rights, set out in Land Titles, also have Enduring value.
On the other hand, the Legal Values to the Government of Contracts Claims, Tenders etc. diminish rapidly after

final settlement, and cease totally after the Statute of Limitations pertinancy.

Historical or Research Value

The main value here is the fact that people often want (or need) to know how something started or was originally formed. What is the History or Background to the matter in question? The Record can Relate a Story, Reconstruct, or paint a picture. It can also assist in determining how to go about a particular Job, Action or Activity, by looking at the Pro's and Con's of a previous instance, or method of Operation (Modus Operandi).

Here we are talking about Unique Records for example, Vital Records.

Articles of Association, Patents and Trade Marks,

Those needed to continue or resume a company, or organisation,

Those necessary to the recreation of the Legal or Financial position

Those necessary to preserve the Rights or Obligations of an Organisation or Customers, Employees and Shareholders.

Generaly speaking if a Business or Department has been running for a few years and has a fair number of Employees, then unless it has a Retention Programme, it has an Inactive Records Problem. These Records will be taking up space that can be used more profitably.

A Disposal (Retention) Schedule:-

Saves TIME SPACE and MONEY

Promotes TIMELY and EFFICIENT CONTROL

Indentifies UNIQUE and VALUABLE RECORDS

As a guideline to assist in determining retention periods, bear in mind the three basic types of file.

(1) ACTION FILES Sales, claims, etc Keep approx 3 years

(2) EVIDENTIAL FILES Lease, Contracts, Mortgages Keep approx 10 years

(3) INFORMATIONAL FILES Weather, Census, Statistics Keep approx 5 years

These are rough guide lines obviously and must of necessity depend very largely on Departmental and User requirements. It is of Paramount Importance that you consult with the user. There may be some difference of opinion as to relative importance of a particular record Series.

If the Disposal Schedule is to be successfully implemented, then it is essential that you have the Endorsement of the Officer in Charge , the Head of the Department, The Managing Director, the Chief Clerk. A memo from such a person carries a lot of weight.

Once a schedule is in force, implement it and keep it working, constantly Review and Update it, Nothing is more constant than change, Policies and People change. The most effective method of implementation is to ensure that files are Identified as to their Disposal Schedules when created. A place on the file cover would be a good method of ensuring that missed schedules were identified.

Remember, the person most likely to know the Archival Value of a record is the State Archivist, do not destroy records without first classifying it with that person.

Once the Inventory Form is completed:-

Your next step is to Transpose the Information to the RETENTION SCHEDULE: This schedule is similar in content but different in format.

The object is to simplify the decision making and make it clearer to understand the references.

The Disposal Schedue should be made out in columnar form, using headings such as:-

Department	Branch	Section
Prepared By		Date

No.	Title (include dates covered)	Description	Retention Office, Repository	Archival Decision	Action (Disposal)

Number Sequentially

The number Identifies the Record Series, coincides with the Inventory Form, and can be used for location of Records.

The Title is the Records Series.

The Description is as on the Inventory under Physical Form.

Retention i.e. the number of years the record is to be kept in the office or repository.

Archival decision shows Archival retention.

Action recommended, disposal action as shown on the Inventory Form.

Show when retention dates commence i.e. E.F.A. L.E. whatever.

Six or seven years ago I read a case study on Retention, the Records Manager involved decided to use the Inventory approach of A.B.C. analysis.

A Items are 'Very Important' and need to be kept 'Indefinitely'.

B Items are of 'Some Importance' which must be kept for 'a certain period of time'.

C Items were those of only 'Temporary Importance' and could be destroyed relatively soon.

However Importance as previously stated is Conditional; for example he discovered that an Action in Tort or contract must be brought in a six year period of the last 'Cause of Action': Whereas an Action on a Deed has twelve years.

Once a debt has been Satisfied or a contract Discharged, in theory the documents could be destroyed , but there are problems; The Companies Act requires seven years for certain requirements, the Income Tax Act requires at least seven years for Assessable Income requirements. Then there is the Commonwealth Sales Tax Assessment Act. It goes on. Here you need to speak with your Legal Department, do not just rely on your own knowledge, Different States have differing retention requirements.

In most states it is illegal to destroy records of State Government Departments and agencies, state courts and local government authorities, without the written approval of the State Archivist.

The preparation of a disposal schedule should be discussed with the state archivist and the final version submitted for written approval before any destruction is carried out.

Similarly, records of Commonwealth departments and courts must be referred to the Director General of the Australian Archives, or the Regional Director of the state branch of the Australian Archives.

SUMMARY

Identify Record Series, Prepare Inventories, Determine Values, Consult Users and Management, Obtain Approval, Determine Realistic Retention Periods, Check it out with the State Archivists and your Librarian.

Implement it, Revise it.

Speak to your State Archivist about Selection, Preservation and Exploitation. If you are going to keep them look after them. Do not let them Deteriorate. What is the use in keeping a Record if it is illegible and unuseable? Make sure that you know your own State Laws, they may well be different from the other States.

REPOSITORY PRACTICE

Use Standard Containers,

Locate by Destruction Period, (Do not mix destruction dates),

Number containers sequentially,

Catalogue the contents of the containers,(two copies one for container, one for Binder),

Register of destruction dates. Keep one.

Files in Repositories should be kept in a controlled atmosphere; Temperature and Humidity. Otherwise they will deteriorate.

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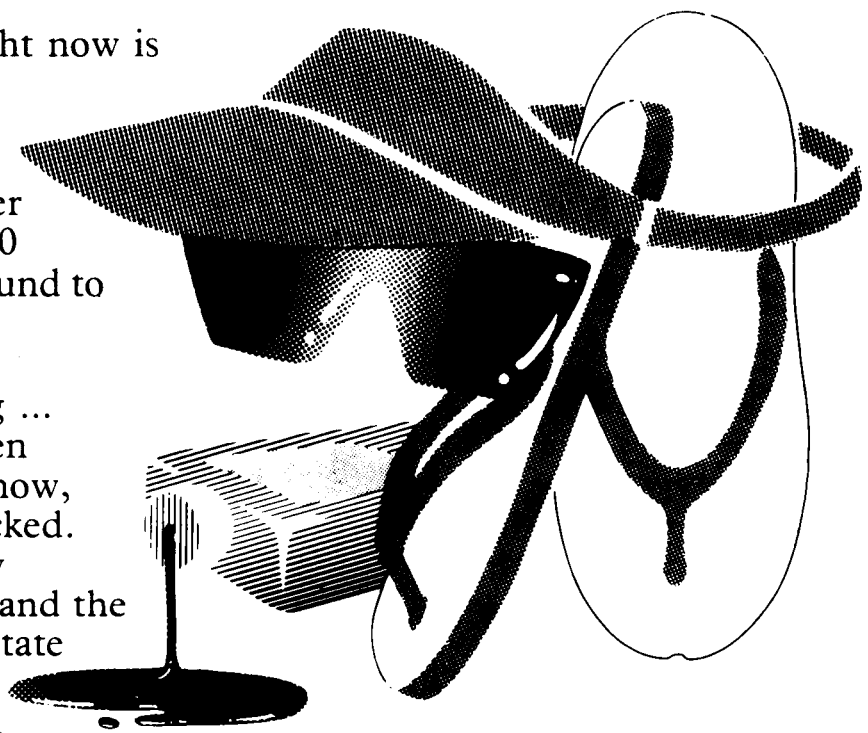

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Visits to British Archivists and Records Managers

By: Annthea Love, Records Officer Unversity of Western Australia

During my annual leave in July 1985, I was able to contact members of the British Records Management Society who were able to provide introductions to British Archivists and Records Managers. As a result of these introductions I visited two academic institutions, the Universities of Glasgow and Liverpool , two resource companies, British Petroleum and Phillips Petroleum, the Times newspapers and the British Broadcasting Corporation. The following report contains a summary of these visits.

1. The University of Glasgow

The University of Glasgow holds one of the largest collections of business archives in Britain - the Adam Smith collection. This collection contains all Scottish shipbuilding archives, including Scott Lithgow's who were responsible for building the Queen Elizabeth I. It also holds the House of Fraser archives, a locomotive collection, Scottish Textile Mills' records, including all Robert Owen material, and Scottish engineering companies such as the Greenock Ropeworks. In addition it houses various family collections and the University's own archives which date back to the 15th century. The archives act as a repository for companies who lack both the expertise of a professional archivist and sufficient storage space. As a result of providing this service the archives are fully self-supporting.

In order to simplify indexing and acces to these records a computerised system has been introduced. A data base of holdings is being established, but this should take some time to complete. Micro computers linked to a mainframe have been utilised for this purpose.

The Archivist is responsible to the University Court and he operates independently from the administrative area. It is the responsibility of the administrative staff to send documents to the archivist for culling or storage. The Archivist, Michael Moss, expressed concern at these procedures as he could not be certain that he was receiving all documents, eg. the Principal is reluctant to part with what he considers 'confidential' documents. Mr Moss regretted that the University had not implemented an integrated records management and archive programme. This is something which the University of Western Australia is to be congratulated upon as current records management is seen as the first step in the processing of archives.

2. The University of Liverpool

As with the University of Glasgow, the archives of the University of Liverpool operate independently from the administrative area, although they were once under the control of the Registrar. Liverpool University awards a postgraduate Diploma in Archival Administration and the Archivist is responsible for teaching Archival Administration.

The Archivist collects and stores records as the administrators and departments discard them. In keeping with his colleague at Glasgow, the Archivist, Michael Cook, expressed concern that he may not be receiving all relevant material. Mr Cook attempted to implement a records management programme to control the University's administrative records, but he met with too much opposition from senior administrative staff for the programme to be successful.

To assist indexing, and for eae of acess to material, Mr Cook has introducd a self-programming SQL software package. To run the program Osiris microcomputers were selected. These are linked to the mainframe computer, but they can be operated independently from the main system. The program contains information on consignment number (ie a consignment of documents received from a department), class number (meaningful to three digits), accession number, date received, cull date and title of item up to 50 characters. Any of these entry points can be accessed by typing in a few commands. An index is produced from this information by title in alpha sequence or in numerical order by class. It is a sophisticated Records Management System and capable of being set up without employing a programmer.

3. British Petroleum

British Petroleum has an extensive Information Services Division. This area has three separate functions.

(1) Current records management, including management of departmental libraries.

(2) Records analyst function.

(3) Archival function.

Each department in Bristish Petroleum attempts to be cost effective and the Information Services section is no exception. Information Services sell their skills to the other departments and charge for archival and retrieval services. The analysts are requested to set up Records management systems where a departmental head feels it is appropriate and the analysts organise the RMS according to the needs of the department. As a result there is no standardisation in indexing.Obviously, the analysts attempt to install compatible systems within each area, but

Carl Newton, the Chief analyst, admitted that due to internal politics this was not always possible.

Departments send 'redundant' records to the central area for recording, storage or archiving. Each record is given an identification number on receipt to enable it to be entered into the computerised index of holdings. If indexing was standardised throughout the company an identification number would be its unique number.
The archival area contains the company's administrative archives and this includes the artwork for advertising compaigns throughout the company's history. Thus, there are valuable works by Rex Whistler, Vanessa Bel, etc. The archives are not open to the general public, but on the completion of a company history, by the company historian, they will be open for general use. British petroleum is an exceptional example of an organisation which operates a fully decentralised records system and it does this effectively and efficiently.

4. Phillips Petroleum

In contrast to British Petroleum, Phillips Petroleum, until very recently, operated a fully centralised keyword indexing system which was controlled from Texas, USA. The Records Manager could not open a file until he had telexed for permission from the US. No cross-referencing of correspondence was allowed. This tight control of the index was a result of litigation cases against the company under the USA's Freedom of Information Act. Essential information could not be found because of unprofessional records management techniques and the company lost millions of dollars as a result of these law suits. Unfortunately, such tight control of language did not work on an internal scale as American terminology was not standard for England or Holland or the Persian Gulf. As a result centralised control has been released and the company's international branches have been allowed to follow their own local systems. My contact at Phillips was Bill Young, President of the British Records Management Society. Mr Youny is responsible for the Exploration Department's records. These contain thousands of seismic charts which are printed from magnetic tape. It is essential that these are stored in suitable conditions and easily accessible. If any are lost it can cost thousands of dollars to replace them as the initial exploration of the area would have to be repeated. These discussions with Bill Young were extremely profitable as it clarified the dangers of inflexible centralisation, just as those with British Petroleum records managers illustrated the drawbacks of a decentralised system.

5. The Times

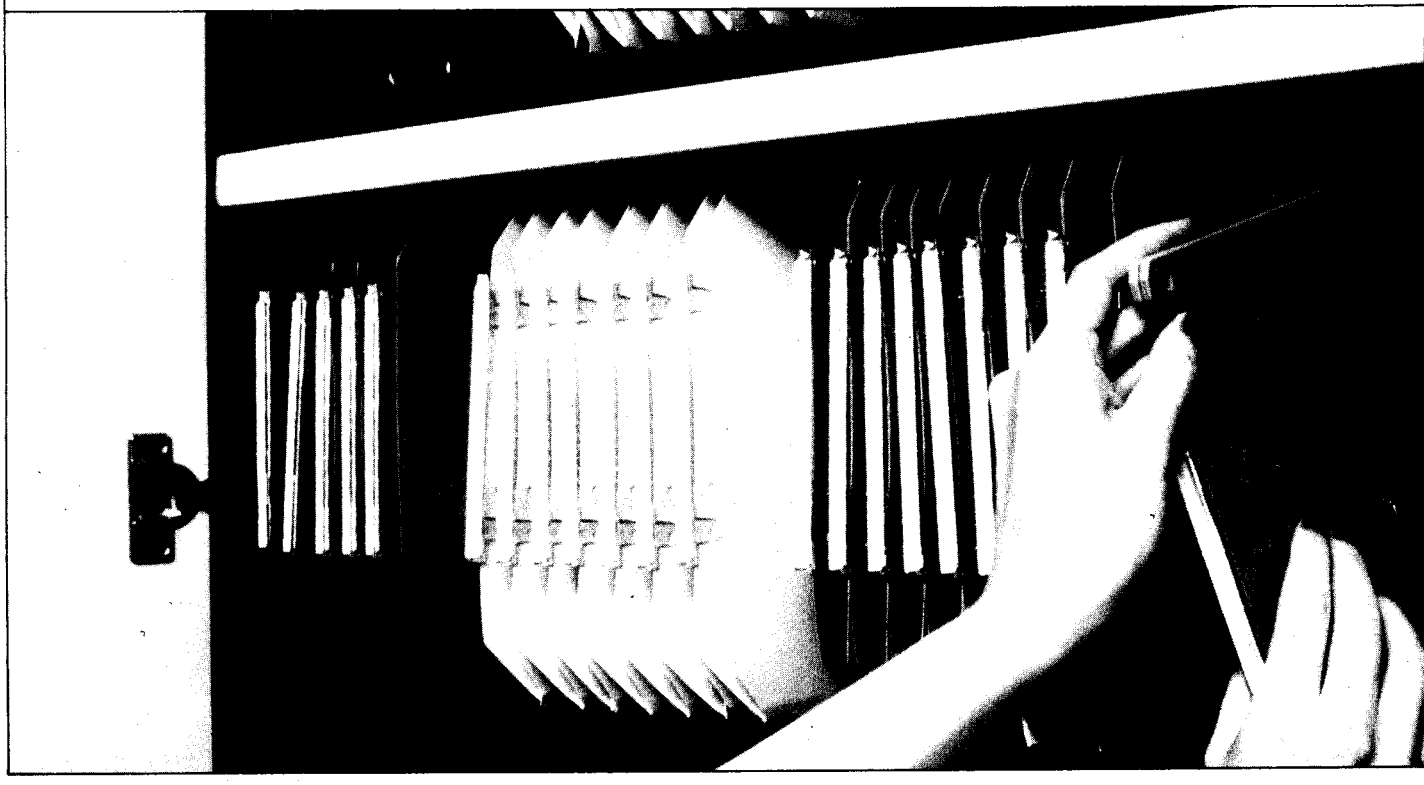
The Times' records area is controlled by Anne Piggott the Archivist. It has a staff of three and holds the administrative records, copies of old newspapers, paintings and artifacts. The index to holdings is not computerised, but a new computerised system is being implemented in the near future. The archives are open to the public and changes are made for a retrieval service provided by the records staff. These are nominal charges to discourage frivolous users, ie. $6.00 for a half day and $10.00 for one fully days use. Photocopying services are an additional charge.

6. The British Broadcasting Corporation

Shelley Hardcastle, Records Manager at the British Broadcasting Corporation, is responsible for records repositories which are known as Records Management Centres. In 1979 the first Records Centre was esablished by Ms Hardcastle in order to ease storage problems in the main London office. Ms Hardcastle's expertise in organising the Centres has been used by British Broadcasting Corporation office managers in other parts of England and it is likely that these Centres shall become more popular in local offices to store material.
By storing non-current records in an area outside of Central London there is a saving of expensive prime office space and it leaves the registries in the main offices free to deal with current records. The records Centre receives records from all departments and details of the consignments are stored on microcomputers. This computerised RMS includes a tracking system as these 'redundant' records have relatively high usage by producers, etc. Thus the Records Centre is not merely a store,but an intensely used area with a very sophisticated retrieval service. New premises are planned for 1986 and this will eliminate the need for commercial storage services which, at present, hold a percentage of the British Broadcasting Corporation's records. The Records Centre sends material to the archives and the archivist makes the decision whether to dispose of or retain the material.
Ms Hardcastle, who is the Secretary of the British Records Management Society, is examining the possibility of establishing a postgraduate course in Records Management which will be the first in Britain. Traditionally, like Australia, British Records Managers are recruited from the ranks of Librarianship and Archives Administration.

In conclusion, my visits to the above colleagues in Britain were extremely profitiable as they provided the opportunity to view some unique records systems which would not have been possible in Western Australia. The main advantage in viewing unfamiliar records systems is that it prevents a Records Manager from becoming 'locked in' to one system, i.e. the one which he or she operates and is most familiar with. Interaction with professional colleagues can lead to innovations and improvements in the RMS for which the Records Manager is responsible and I feel that this was the most important aspect of my United Kingdom visit.

Our files just hang around



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Organisation of Information in Libraries

By John Goodell, Ph.D., ARMA, AIMM

Libraries engage in a number of functions to achieve their mission of providing information; however, this paper will concentrate on organisation of and access to information.

In the last 100 years or so, a few general trends have emerged which have had a significant impact on the practice of librarianship. The first trend has been a steady increase in collection size. A hundred years ago a library of 20 000 volumes would have been considered a good sized library. Today such a library would be considered samll. Obviously an increase in size creates the need for more sophisiticated organisation and access.

The second general trend has been the diversification of formats or types of materials. Specifically, the newer media, such as motion picture films, slides, audio recordings, video recordings, computer data bases, etc. make the task of providing a satisfactory system much more difficult. Naturally, there is also the problem of physically housing these items.

A third, and perhaps the most important, trend has been a change in user demands. What has happened is that knowledge has been increasing at an ever increasing rate. today's users are demanding more sophisticated information due to the complexity of knowledge. Further, they require information much faster than they did in the past. This may be a matter of rising expectations -- since we are able to provide information more quickly, people begin to expect it more quickly. Whether this is the case or not, most people are no longer willing to wait great lenghts of time for the information they require. Another aspect can be summarized by the principle of least effort. This principle says that people will go to the information source which is closest or required the least effort for them to access, and they will do this with little regard to the potential that information source has for providing what they need. Individuals are looking for a fast, convenient, one-step information source.

Some of the differences between Librarianship and Records Management stem from the kinds of materials acquired.

Most library materials are published, i.e., they are readily available in the market place. This implies they may be easily replaced. Even those which are no longer in print may be replaced by photocopying those held by other libraries. The general scene, then, is one of large number of libraries acquiring much the same sort of information. This, in turn, means it is economically possible to have centralized indexing and cataloguing services.

These centralized services can take a number of forms. For example, libraries may purchase the records which appear in their catalogues from central operations such as the National Library of Australia or a number of private firms. It is estimated that the U.S. Library of Congress and the British Library between them produce cataloguing data for approximately 90% of the materials published in English.

A second kind of centralized services are the printed and online indexing and abstracting services. Although they may cover a variety of formats, their major usefullness is in getting at the contents of periodicals, books, and what might be described as renegade information, e.g., technical reports, plans, submissions, etc. Since libraries acquire periodicals and other materials in great numbers it is economically feasible to produce indexes to their contents. Originally, of course, the indexes were in printed format. However, in the mid 1960's publishers decided to improve the efficiency of their operations by utlizing the computer to produce the printed indexes. Therefore, they put their indexing data in machine readable form. Once this was done, it was possible to search the machine versions which would be more up to date than the printed ones. Further, they could be accessed in new and different ways.

Most Records Management operations, on the other hand, tend to deal with materials which are either unique or exist in very limited numbers of copies. For example, it is necessary to keep track of reports, plans, submissions, personnel data, correspondence, etc. This, of course, tends to create a situation which is opposite from that of most library materials. It also is not feasible to have centralized indexing and cataloguing to any great extent.

Although this is the general situation, there are exceptions. For example, libraries do acquire material which may be described as unique or close to being unique. They often collect archial type material which is relevant to local or institutional history. Special libraries which concentrate on a limited field of knowledge often have technical reports which are not widely distributed, and, in fact, may be confidential. Libraries also acquire ephemeral material, such as pamphlets, brochures, newspaper clippings, etc. These ephemeral materials are usually stored in a vertical file and not given the same in-depth treatment as other materials. Then there is the matter of what might be described as the "New Media", the films, audio tapes, video tapes, and other information sources mentioned earlier. In addition, Libraries are becoming concerned with eletronic publishing and other developments such as informational databases. An informational database is one that provides information on a par-

ticular topic; for example, there are databases which provide information concerning the sharemarket. Bibliographic databases provide citations to information contained in books, periodical articles, etc. The point is that libraries acquire a wide range of materials, even though most libraries today consist primarily of books.

In summary, standardization in libraries has been possible. Further, technology and economic forces have made it highly desirable and even necessary in some cases. Now for a brief overview of how libraries have sought to provide access to the information in their collections.

Classification

Generally, classification can be defined as putting like things together and keeping unlike things apart in some sort of logical or systematic manner. Library classification serves two general purposes: (1) a shelving device which provides the user with a means of locating a specific work or of finding other works on the same or related topics and (2) a method of organizing bibliographies, indexes, printed catalogues, etc. Most libraries in Australia use classification only for the first purpose. Very few have what could be described as classified catalogues or indexes which are designed for public use. When librarians think of classification, they generally think of subject classification; however, they recognise there are other types which can be quite useful in certain circumstances. For example, classification by size of book is useful and feasible when the books are not available to the public, because there will be considerable savings on space and other storage costs.

Probably the classification most familiar to you is the Dewey Decimal Classification which was first devised by Melville Dewey in 1876 and has been revised numerous times. This scheme is what has been called philosophical or theoretical in that Mr. Dewey looked at knowledge and divided it into ten major categories. These ten were then further subdivided as required into ten and the second ten further subdivided into yet a third ten. This pattern was followed throughout the classification until the required level of specificity was reached.

Another approach is the practical or pragmatic approach. This approach takes a look at the materials to be classified and then designs a classification which is appropriate to that particular collection of materials. The Library of Congress classification follows this approach. For example, it would seem reasonable that the Library of Congress would have more materials on the history of the United States than any other country. Therefore, its classification scheme allows considerably more space for U.S. history than it does for any other country.

A third approach used to classify some library materials, particular government documents, is based on what is known as provenance. This approach looks at the originating body and assigns notation to that body. Materials may be further subdivided by other characteristics. For example, a subdivision by format might mean annual reports are listed first, serials next and so on. Provenance results in a very rough subject breakdown -- rough because materials coming from a particular governmental body usually are on the same topic. Usually, but not always. Today all kinds of government departments and private agencies make environmental impact studies which cover topics outside their main area of interest. There is a second problem related to using provenance and that seems to be reorganizing itself with not only new names for old, but new organisations which either appear full blown out of nothing or result from splitting or combination of exisitng organizations.

Just two concluding points about classification schemes. First, they must be up to date. A scheme which is not up to date does not allow the easy integration of new materials. The second point is that the scheme needs to be hospitable. That is to say, new classes can be easily fitted into the scheme. The Dewey Decimal Classification has overcome this problem by use of Arabic numerals and decimals. The result is that any number can be expanded infinitely past the point decimal. There are drawbacks to this, of course, but the point remains that the notation is virtually unlimited. The Library of Congress utilizes capital letters and numbers as the bases of its classification notation. Its base is quite large because it has the initial 26 letters of the alphabet which are combined with second or third letters as required. In addition, it uses the numbers from 1 to 9 999. The combination of letters and numbers, then, creates a very large base. The Library of Congress also uses some decimal expansions. It also has other devices for expanding the scheme but they are too involved to discuss here. The conclusion is that both the Dewey Decimal and Library of Congress schemes have either infinite or very large potential notational bases which can accomodate new classes.

Subject Headings

The next topic is assignment of subject headings in a catalogue or index. These are used because the resulting shelf arrangement from the classification of books and other materials is linear. That is, each item has one and only one place in the classification. For example, a work which treats both law and economics has to be placed physically with one or the other -- it cannot be in two places at the same time. But, in a subject index it can be placed under both headings, thus leading to a multi-dimensional approach. When the actual headings are

created they ideally should be based on an organised plan or classification scheme. Sometimes, though, such lists are drawn up in a rather haphazard manner resulting in inconsistencies which are confusing to users.

The language used in subject headings may be of one or two varieties. First, it can be natural language. Natural language is normal usage. Artificial language is language that has been designed to achieve some sort of classified arrangement within the subject heading list. Consider the term "utility trucks". Natural language will result in the heading "utility trucks". Artificial language might result in something like "trucks, utility". By inverting the order all materials on trucks will be brought together in the catalogue or index and then organised by type of truck.

Up to this point, it has been assumed the index uses a "controlled vocabulary". A strictly controlled vocabulary means that only the authorised or approved headings may be used. The other extreme is an uncontrolled vocabulary where any term which is deemed to be appropriate to a given document may be used. There is no limitation, and, usually, no subject list or thesaurus applied. Derived indexes frequently use uncontrolled vocabularies. The familar KWIC and KWOC indexes reflect this. Using key words from titles of documents is a particularly useful approach from a number of points of view. First the process is mechanical. Normally, there is a list of what are called "stopwords", words which are not indexed. Commonly, these are articles, prepositions, conjunctions, etc. So, therefore, we would not expect to find entries under A, An, The, Of, In, And, Or, etc. But, once that has been done the information can be put in machine readible form and a computer programmed to produce the index. These indexes are quick and easy to produce. They are up to date because they do not have to wait for a human being to manually assign subject headings to the documents. The terms used in the documents titles are likely to be more current than those in a subject heading list or thesaurus. Before they are included in a list or thesaurus, terms must become accepted by people in the field. Thus, there is usually a gap between the terminology in a thesaurus and that being used in a field. As you have no doubt guessed, these indexes have their disadvantages, too. Inconsistency in terminology will be rife. It is not possible to force authors to use the same terms for the same concepts in their assignment of titles. For one reason or another, authors may prefer to use a title which is catchy or in some other way not reprsentative of the subject matter of the document. These points aside, these indexes have their place. They are quite useful where the collection of materials is relatively small and where speed of access is paramount, and, further, where it is not essential to retrieve every document relevant to a particular search. In other words if we want just a few documents relevant to our search these indexes may be quite useful. They are frequently referred to as "quick and dirty" indexes.

These are the two extremes -- but it is possible to have indexes in between. We might take a key word index and decide to enhance or enrich the titles by applying terminology to overcome some of the drawbacks inherent using key words from titles alone. The rule of thumb is that the more effort you put in at the indexing stage, the less effort will be required at the searching stage. The converse is also true: the less effort you put in at the indexing stage, the more will be required at the searching stage. If the indexer applies the first terms that pop into mind to a particular document, users must be prepared to accept inconsistency at the searching stage. The searcher must consider all of the possible terms that have been used and how they have been used, if all of the information in the collection on the particular subject is to be retrieved.

For the most part, libraries would tend to use controlled vocabularies from well established and supported lists. The most widely used list is the Library of Congress Subject Headings List. The reason for its wide acceptance is that it is cheaper and easier to use a list which is established than to create and maintain your own. Libraries are willing toaccept certain drawbacks as necessary trade offs. For example, the Library of Congress Subject headings were initially drawn up about the turn of the century and have been added to, revised, and corrected over the intervening years. The result is that certain sections of the list are less good than others. It is also obvious that there are some differences in the use of English in the United States and Australia. In most instances these differences are minor. However, there are some which could create problems. In addition, because the list has been created over a period of years, some of the terminolodgy is not even in accord with current usage in the United States. Libraries which use this list accept drawbacks with the benefits.

Names

Names may be used for subjects of items as well as for producers and can be divided into three major groupings: personal names, names of corporate bodies, and geographical names.

Personal names generally do not create too many problems. What problems they do create centre around variant forms of the name, different patterns used in foreign names, and when two people have precisely the same name. The major difficulty with goegraphic names arises from the fact that some of them also are names of corporate entities.

That leads to corporate names. Corporate bodies are groupings of people which act as one. These do not necessarily have to be legally constituated bodies. They could be a neighbourhood committee formed to achieve something, a conference or a symposium, or any other grouping which will act as one and which is likely to produce written material. Some of the problems associated with corporate names are subordinate bodies, direct or indirect entry, variant names, corporate names which include a personal name, and those of govenrment bodies.

First there are problems associated with variant names for the same group. These come about from differences in language, variation between the popular and official name, etc. The general approach is to decide upon one name and then to make references from the variations to it.

Some corporate names include the name of an individual; for example, a company called John Smith Pty. Ltd. Current library practice would be to locate the name under the first word or initial with cross references from the surname.

Another problem area is names of government bodies. For example, the general approach is to use the geographic name for the name of the particular political entity if there is a difference. This will result in "Australia" and not "Australia Commonwealth of Australia", which also fits with common usuage. Naturally, there would be a cross reference from "Commonwealth of Australia" to "Australia".

Subordinate bodies are those which are part of a larger organisation. The first problem is whether they should be entered under their own names or as part of a larger body. Generally, if a name is distinctive, it will be entered under its own name. Thus, the ABC Symphony Orchestra would be entered under that name rather than under: "Australian Broadcasting Corporation. Symphony Orchestra", although there would be a cross refernce from the unused to the used form. The Australian Bureau of Statistics also would be entered under its own name. But, the Bureau of Agricultural Economics would be entered subordinately, i.e., under "Australia. Bureau of Agricultural Economics," because it is not distinctive. It is possible that a state or some other country could have such a bureau.

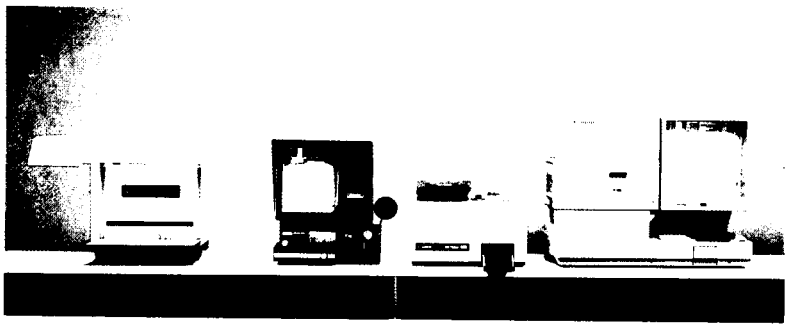
Taking this one step further there is the problems of whether a body which is to be entered subordinately should be entered directly or indirectly. For example, I work for the Department of Library and Information Studies which is one of four departments in the school of Business Studies at the Queensland Institute of Technology. It is obvious that "Department of Library and Information Studies" is not distinctive and so must be entered subordinately. The next decision is whether it should be entered directly under the Institute's name or whether the School's name must be inserted. In this instance, the School's name may be omitted because there is no other department by the same name at QIT nor is it likely there will be. Thus, the entry would be: Queensland Institute of Technology. Department of Library and Information Studies.

There are numerous other problems associated with corporate names; however, space does not allow discussions of them.

Conclusion

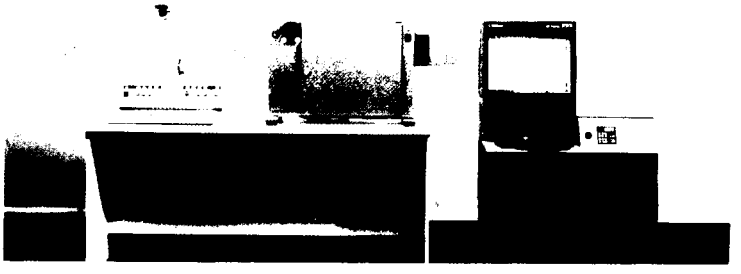
In conclusion, I would like to stress that many library operations have been standardized. There are very detailed and precise rules for setting up names and other entries which have been codified into the Anglo-American Cataloguing Rules. The same is true in the area of library classification. The more common problems libraries face and to indicate in a very general way some of the solutions to them. There are many area which have been omitted or not fully explored. For example, the impact of computers on library-operations has been mentioned only in passing; but, their impact has been significant and promises to be even more so in the future as the need for information continues to expand at and ever increasing rate.

S.O.M. I



S.O.M. II

S.O.M. III



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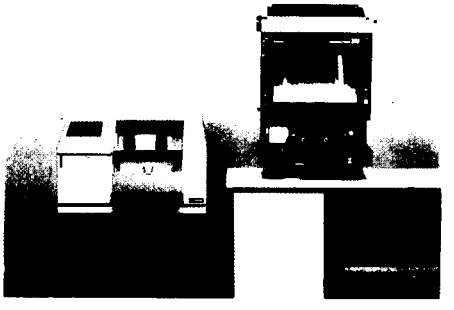

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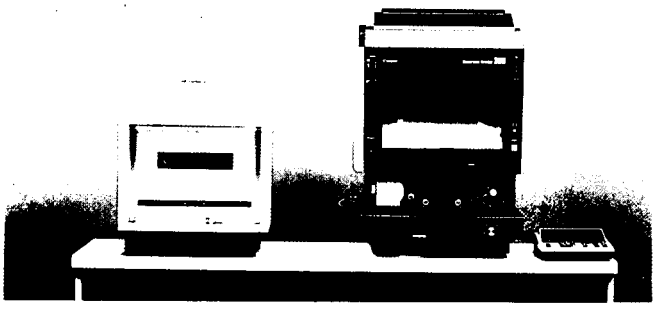
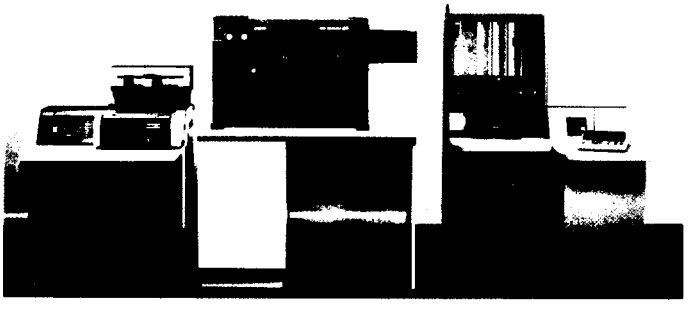


SYSTEM VI



The ideal microfilm system for small to medium size applications, where the need is to hold all the documents in a single file and update as required. The documents are filmed and processed in a one step operation and then stored in a dedicated microjacket, which can be filed, duplicated or converted to a plain paper copy.

This system has solved the problems associated with the long term storage and retrieval of accounting, medical, personnel, loan and insurance files.

The highly automated Canon Filmer 100 forms the basis for this microjacketing system. Total security of the system is maintained with the addition of the 165 Desk Top Processor.

The system is used in similar applications to the microjacket system as outlined in S.O.M. 1. However, the utilization of a separate camera and processor allows it to handle higher volumes.

A microfilming system with the emphasis on high quality filming and reproduction of general purpose documents up to A3 in size.

The system meets the requirement for a permanent record, for active or archival applications such as invoices, debtors, creditors, statements, journals and delivery dockets.

Ease of handling and retrieval is facilitated by utilizing the 16mm cartridge and the auto-loading NP580 Plain Paper Reader Printer, with all the benefits of high quality filming and in-house processing guaranteed by the CF100 and AP165.

The 700P with built-in automatic feeder is especially designed for cheque or voucher size documents raised by credit unions, building societies, banks and smaller transport companies.

Information can be filmed, processed and ready for use in a matter of minutes.

The CP380 Reader Printer completes the system, offering simple and reliable access with its auto-load carrier, and high quality prints.

The combination of 161G Processor Camera and the CP380 File Search Reader Printer is our most economical entry into computer assisted retrieval, offering ease of use and total in-house security.

The fast and efficient keyboard retrieval, coupled with your computer or ours, forms the ideal introduction to computer indexed micrographics for improved records management.

Designed for the medium to high volume user for all general documentation, this system incorporates all the benefits of quality, high speed filming and convenient desk top processing.

Fast retrieval is obtained on the 580FS Plain Paper Reader Printer which can be computer interfaced giving you precise document retrieval.

A Canon Micrographic System is an installation of between two and five machines.

At Canon we can tailor make a system to suit your specific business requirements. Whether you have ten thousand or ten million documents to store and retrieve.

Canon Micrographic Systems are in use today making business more efficient. Our Small Office Microfilm (S.O.M.) Systems can be found in hospitals, insurance companies, finance companies, the accountancy and legal professions. In fact, anywhere where the need to assemble a single updateable file is necessary.

Where the need to access information is much greater, such as banks, transport companies, building societies, Canon has a range of high-speed, heavy duty systems which can be computer interfaced to suit your needs.

And Canon Micrographic Systems are designed to grow with your needs because they are flexible. Any individual component can be upgraded to suit your expanding requirements without the need to replace the whole System.

As an example of a Canon Micrographic System let's look at a Small Office Microfilm (S.O.M.1.) System as shown on the left.

The 161G is an auto-exposure Camera and Film Processor in one convenient desk top unit. All you do is place the document you wish to put on microfilm on the copy-board, the camera above the document takes the picture and the film is then automatically processed and available for use in about five minutes.

System VI in operation at the Ansett Air Freight National Customer Service Centre. This "Cano-Freight InstaFind" freight finder system serves Ansett Air Freight nationally from this one location at Mascot, NSW.

With the aid of the jacket loader the roll of film is then converted to a convenient postcard size file called a microjacket. This microjacket imitates your manila folder. This means you can fill it, or add just one document, whichever you wish. It can then be titled, indexed and filed.

When you desire a full size copy, or just wish to see a specific page of files that have been put on microfilm, all you do is insert the entire microjacket into the Canon PC 70 Reader Printer. The image of the page is then projected on the bright, easy-to-read screen. If you wish, you can then make a plain paper copy with a simple push of a button.

As you can see, a Canon Micrographic System offers fast, easy storage and access to your information on a day-to-day basis. You can hold your entire file in one easily supervised area without the need for outside storage and its associated problems.

And because your information always remains stored in the sequence in which it was filmed, it is less likely to be misfiled.

Canon Micrographic Systems, a modern, easy-to-use fact of today's business life.

Planning a Course in Information Management

By Mary Sandow-Quirk

The Department of Library and Information Studies at the Queensland Institute of Technology has proposed the introduction of an undergraduate degree in Information Management during the next triennium (1988 -1990). The proposed course has the support of the School of Business Studies and of the Institute as a whole; currently it is under consideration by the Queensland Board of Advanced Education, but given the importance of, and the need for, such a course, the Department is cautiously optimistic.

Why has this course been developed and what is its relevance to Records Management?

Those familar with Decision Support Systems research will have encountered the concept of "the provocative environment". In our context, this means that a person, or an organisation, is made aware by various stimuli that something important in the working environment has changed, and that current methods or ways of doing things are no longer adequate or appropriate. Some people see the need for change, but sooner or later these 'provocative' elements in the environment become too insistant to be ignored by even the least perceptive. Our Department has grown increasingly aware over the last five years of the maturing of the various information professions, of a new acceptance of the importance of information as a resource both in the corporate and bureaucratic spheres, and of the need for a different kind of information professional - the Information Manager - for whom there is as yet no adequate professional education.

A number of 'provocative elements' have led us to try to meet this need.

As professional educators in the area of information work, we are in daily contact with our own graduates and with those organisations which will employ them. For some time, graduates (i.e. persons holding an undergraduate degree and a Graduate Diploma in Library Science) have been reporting a need for further training in areas related to librarianship but distinct from that discipline as it has been traditionally understood. Librarians whose expertise lies in the acquisition, organisation and retrieval of information from print and non-print resources held in a library or resource centre find themselves suddenly asked to manage records or archival collections. They are used to accessing bibliographic or full-text databases but now realise that they need some familiarity with numeric databases or with Management Information Systems and latterly, with Decision Support Systems. They are often required to make purchase decisions about computer hardware and software, decisions which have ramifications for the organisation as a whole. In many cases they have been given these responsibilities in recognition of their managerial competence, but often, it is because they are the only information workers in the organisation formally designated as such or the only ones holding tertiary qualifications in the information field.

The awareness of employers that they need an Information Manager is manifested in the growing number of advertisements for such positions, and for us, these advertisements were the second 'provocative element'.

These positions carry a variety or titles - 'Information Systems Manager'; 'Information Administrator'; 'Information Systems Co-ordinator'; 'Manager-Information Services'; 'Information Officer'; 'Information Manager'; 'Information Systems Officer' and 'Manager-Corporate Information' are just some of them - and demand different aggregates of information - related skills and formal qualifications. Whatever the combination of skills required, they generally fall into five catergories:

1. Information handling skills e.g. indexing and retrieving information; thesaurus development; records and archives management.
2. Information technology skills e.g. database design and maintenance; information systems analysis and evaluation.
3. Management skills e.g. strategic planning; policy making; human resource management.
4. Communication skills e.g. interpersonal skills; public relations; report writing.
5. Research skills e.g. statistical analysis; survey research.

The confusion of employers as to what kind of person they need is reflected in the qualifications they specify. Although some request quite specific qualifications, such as an economics, computing or accounting degree, or librarianship or records management training, many advertisements stress the need for 'considerable experience' with records or information systems or in management or data processing. The want of formal training specifically for information management is shown by the vagueness of advertisements which ask for an appropriate tertiary qualification or a degree in law/arts/economics, computing or some other appropriate discipline.

Over two years ago we began what has become an on going market survey to determine whether there is a need for information managers in Queensland and whether graduates of an information management courses would

find employment. We consulted a number of senior managers in private enterprise and in federal, state and local government, adopting the definition of information management of Donald A Marchand:

> "The aim of information management is to promote organisational effectiveness by enhancing the capabilities of the organisation to cope with the demands of its internal and external environments in dynamic as well as stable conditions. Information management therefore . . . . includes two dimensions:
>
> (a) Managing the information process, and
>
> (b) Managing the data resources of the organisation".[1]

As a result of our first, informal survey, we have concluded that there is strong support, particularly in the public sector, for the concept of a degree in information management; one senior public official told us that he could employ half a dozen such people immediately. The programme was accepted as meeting a genuine need for the training of managers whose expertise is in dealing with a vital organisational resource - information. It was represented to us that a sound foundation of theory married to its application in the workplace was indispensible. There was particular concern that any such course equip managers to assess the benefits of information technology and to employ it cost-effectively and with discrimination.

Our perceptions of the need for such people has been further strengthened by the decision of the Victorian Public Service Board to create a career path for information managers in government departments. It is interesting to note that administrative officers, computer systems operators and librarians are all free to move into this stream for which 'no one specific professional qualification is needed, but which can be used to manage any particular aggregation of specialist information activities'.[2] The present lack of an integrated professional education for such people is demonstrated by the comment of a member of the Board that "we will not be drawn on which professional group is the natural inheritor of the mantle of expertise in information technology. Our view is that there are a variety of skills available and needed, and all should be available depending on the task. Our view also is that it would be desirable if all "information professionals" had the perspective that they were equipped to move among the various occupational groupings that I have described'.[3]

Duties statements for information managers at various levels of the Victorian Public Service illustrate both the importance of the information management function and the difficulty of describing exactly how it is carried out.

At level 6, information managers participate in the development of policy for information management with particular reference to Freedom of Information and access requirements and are responsible for liason with co-ordinating agencies in the areas of information systems and procedures, Freedom of Information and records management.

At level 7, information managers develop and advise on policy in the areas of information systems or co-ordinate the application of systems and procedures for the management of information resources.

Level 8 information managers operate within broad guidelines to manage an operating unit designed to provide a comprehensive information system, undertake the development of such systems and provide authoritative policy advice to senior mangement.

Finally, an information manager at the Senior Executive Officer level might typically manage a department's Information Systems Branch, provide high level advice to the Director of Corporate Services and the Director-General on a wide range of information systems matters. He/she ensures the provision of high quality information sytems for departmental users.[4]

The Public Service Board of Western Australia has also recognised the need for information managers, although that designation does not seem established nor is there a formally established career path for such people. In a recent advertisement for a Director, Professional and Technical Services, for the State Planning Commission, the functions of that Division were described as 'information planning, notably identifying the information needs of the Commission, preparing an information plan, maintaining an effective internal information service; development and maintenance of computer services, including maintenance of effective computer operations and managing and updating the information technology plan; systems development, primarily the design and development of information processing systems; publishing technical advice, research findings and information of general public interest or educational value; providing and co-ordinating central cartographic services.' Tertiary qualifications were required in one or more of the following disciplines; information sciences, management and information systems, communication studies, or social sciences. Applicants also needed to have had

extensive postgraduate experience in one or more of the following areas; information planning, social sciences, systems development, provision of planning services, cartography/graphics and communications, plus wide administration experience.[5]

The Port of Melbourne Authority, too, has recently advertised for a senior information manager, designating the position as Manager Corporate Information.[6] The position is obviously that of a high level information manager.

This manager was required to develop a corporate information map which would provide a comprehensive directory of corporate information and ensure the accessibility of this information to line managers within the Authority. The Corporate Information Department was to develop data administration policy and standards and to assist with the management and facilitation of end user computing.

It is interesting that although a computer background would be advantageous, the Manager was not required to have been involved in traditional information systems work. He/she did need 'a sound understanding of modern business practices and the relevance of information to the business as a whole, well-developed research and communication skills and the ability to communicate across the organisation to develop a clearer picture of experience information needs. Again, no specific formal qualifications was seen to cover all areas of expertise involved.

It is apparent that the skills required of information managers working in public administration fall into the same five categories drawn from advertisements for positions in private enterprise.

As academics, we have naturally been influenced by the growing literature of information management. Such literature appears as monographs, conference proceedings, journal articles and papers in the disciplines of management, communication, public administration, computing/information science, records and archives management and librarianship. This literature (which includes a journal actually called **The Information Manager**) demonstrates a growing awareness of the centrality of information to public and private enterprise and, at the same time, confusion that the proliferation of information made available through computer and telecommunications technology has not enhanced management effectiveness, but rather the contrary. As Gustav Bujkovsky wrote:

> The advent of the computer created a paper explosion and brought forth a flood of information. It is now possible to produce enormous quantities of information, some needed and some pure garbage.
>
> "It seems that everyone has jumped on the bandwagon, for nobody wanted to be left behind in the march of modernization and progress. New departments popped up in different columns of the organisational charts, and all started to build their empires. They justified their existence by creating mountains of paper which they distributed to all managers regardless of their 'need to know'. Many reports became status symbols and were sent to managers who had nothing to do with the subject matter. One systematic study of reports in a large industrial organisation showed that 52 copies of one report ended up in the waste paper basket because the recipients were not interested in its content.
>
> "In such an environment what happens to the managers who need specific information to make a decision? They do not get it, or they get so much that they spend a prohibitively long time looking for what is needed.
>
> "In most organisations today, there is no information manager. Where there is one, that person is usually so flooded with information that he/she rushes from fire drill to fire drill trying to prepare or assemble readily usable information packages for the decision maker.
>
> "Like all functions in a business or industrial organisation, the gathering, handling, processing, selection and presentation of information must be planned carefully in advance. This is the prime function of the information manger.[7]

Bujkovsky was not the first to identify the need for a formally designated officer - or 'office of information management' - to plan and control the flow of information in organisations. The Conference Board (of the U.S.) pointed out nine years ago that corporations might well benefit from restructuring to include a separate management operations function which would direct how - and with what information - all activities of the company are to be managed.[8]

In more recent times, it has been proposed that this function be performed by an Information Executive or 'Chief Information Officer'. Rockart, Ball and Bullen have suggested that the C.I.O. of the future will need a thorough understanding of technology as well as political, organisational and communicational skills. She or he must have

had actual and varied management experience. The C.I.O. must possess highly developed human resource management skills, and both experience and understanding of strategic planning and the management of change.[9]

A 1984 article in the EDP Analyzer applied two terms to the C.I.O. role. The first was 'steersman', (because the C.I.O. hould 'steer' the company's use of information technology). The second was 'architect', (because the C.I.O. should be the main architect of the company's information systems).[10] Given that the EDP Analyzer is a journal intended for professionals in the data processing area, it is not suprising that the article cited sees one of the major activities of the C.I.O. as fostering the development of strategic information systems. "Such systems will seek to gain compeitive advantages by making things easier, faster, more convenient, less duplicative in effort, and more accurate - for customers, for suppliers, for employees, and for managers".[11]

Another function of the Information Manager is that of enhancing the use of decision support systems by helping identify and provide the types of information needed for management decisions. These types of information, as described by F.W. Holmes, former director of information resources management for the Del Monte Corporation of San Francisco, are four in number. There is information generated internally by the organisation. This is either factural - often numeric data - or textual e.g. opinions, memos. There is also information generated externally. This second type of information is either external factual data, e.g. purchased market research data, or external textual data e.g. economic forecasting; rumor. However most research into management information needs have concentrated on internal numeric data because that is what is generated by computer-based information systems. Comparatively little attention has been given to external textual data or internal and external factual data, even though higher level managers tend to make increasing use of external data in their decision-making.[12] Obviously a more balanced approach is needed to the acquisition, organisation, retrieval and dissemination of information in the corporate environment. Holmes lists a number of characteristics of the person whom he calls 'the information executive', and for whom the authors of the EDP Analyzer article use Rockart's term 'Chief Information Officer'.

He/she should be 'a facilitator and provider, not the owner or czar, of information services'. This involves the provision of access to corporate data and external information, and provision of communications networks.

He/she should be the main source of corporate information policy and a partner in corporate planning.

He/she should encourage decentralised computing by end users and support it through a continuing education program.

He/she should have responsibility for the integration of office automation and data processing systems.

Above all, "the information executive must be seen by others within the company, including by top management, as a generalist with multi-function job experience who'knows the business' . . . . . This executive should not be viewed mainly as a technical person. In fact . . . . . this executive must be of senior vice-presidential calibre. The position should be a new function and not part of any traditional company function."[13]

Holmes's executive has a similar function to the information-manager described by Evelyn Whitlock of the American Medical Record Association.[14] Whitlock's C.I.O.

- is responsible for developing information systems strategies and long-range planning for change;
- develops standards for data, for communication, and for ensuring privacy and security;
- is a member of the top management team with particular responsibility for the cost-effective (and decentralised) deployment of information technology.

In summary, 'the C.I.O. will be more than the custodian of the data; he will be a corporate officer who truly understands the connection between information flow and business'.[15]

Like Holmes, Whitlock sees the information manager as a generalist, albeit one with special skills in librarianship, computer science or foreign languages. She or he 'must understand the theories, methodologies, tools, and applications of all disciplines concerned with information-handling. Accordingly, many different professions, approaches, techniques, and tools are involved in harnessing the information technology with no single group enjoying a monopoly.'[16]

Given the wide range of competencies required for successful practice as an information manager, what kind of undergraduate course will provide beginning professionals with an adequate preparation and offer a sound foundation for later post-graduate or continuing education for more senior information managers?

In framing our proposed degree in information management, we have decided that knowledge and skills in four areas are paramount.

- in business management or public administration,because information managers must speak the language and understand the priorities of those they serve;
- in information technology, because such technology is ever more pervasive and powerful; vastly enhances access to and control of information and data; and is increasingly responsive to end user needs;
- in communication theory, with particular reference to data flow within and between formal organisations, because communication is of the essence in identifying individual and corporate information needs and in devising appropriate and user friendly information systems; and
- in the more formal techniques of handling documentary information i.e. records management, archives management and librarianship, because, as has been pointed out earlier in this paper, such information sources are among the most neglected in organisations.

Although the final structure of the degree has not been determined, we are certain of what our course objectives will be. They are that students will acquire:

1. An understanding of how information is created, recorded, disseminated and used;
2. The knowledge and skills required for collecting, repackaging and disseminating information for clients involved in planning, decision-making, research and publication;
3. A knowledge of the function and range of records and other sources of information within a formal organisation;
4. An understanding of the design principles underlying computer-based information systems, and of the role of such systems in meeting specific information needs;
5. The ability to emplement and evaluate information and records systems to meet user and organisational needs;
6. The ability to apply sound management principles to the effective and efficient operation of information systems;
7. An understanding of the principles governing the organisation and retrieval of various types of records;
8. The ability to communicate effectively and efficiently at both intra- and inter-organisational levels, particularly in the context of the interaction between government and business;
9. An understanding of the legal and ethical constraints on the generation, collection, dissemination and use of information;
10. The ability to formulate, advise upon and implement organisational policy related to information management.

We believe that this degree will meet a real need for generalist information managers as more organisations grapple with the issue raised by John Murray in his book Managing Information Systems as a Corporate Resource; 'Will the next five years see our use of information (not data) drive the organisation forward, or will that span of time see the organisation fall behind the competition as a result of failure to fully appreciate the value of information, and to so position itself that it can consistently make the best use of the increasingly rapid change in information processing technology?'[17]

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3. Ibid. p. 14.
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5. Advertisement in the Australian, 19 - 20 April 1986.
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7. Gustav Bujkovsky, 'A look at information management', The Information Manager Spring 1980, p. 41.
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15. Ibid. p. 43.
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17. John P. Murray, Managing information systems as a corporate resource, Dow Jones-Irwin, Homewood, Illinois, 1984, p. 167.

"Why, of course we have it."

"Try to look at it this way. Return the file, and you have nothing to worry about."

Have you read these?

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BRANCH ADDRESSES

Queensland Branch,
P.O. Box 361,
North Quay,
BRISBANE. 4000

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P.O. Box R53,
Royal Exchange,
SYDNEY. 2001

A.C.T. Branch,
P.O. Box E330,
Queen Victoria Tce,
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