

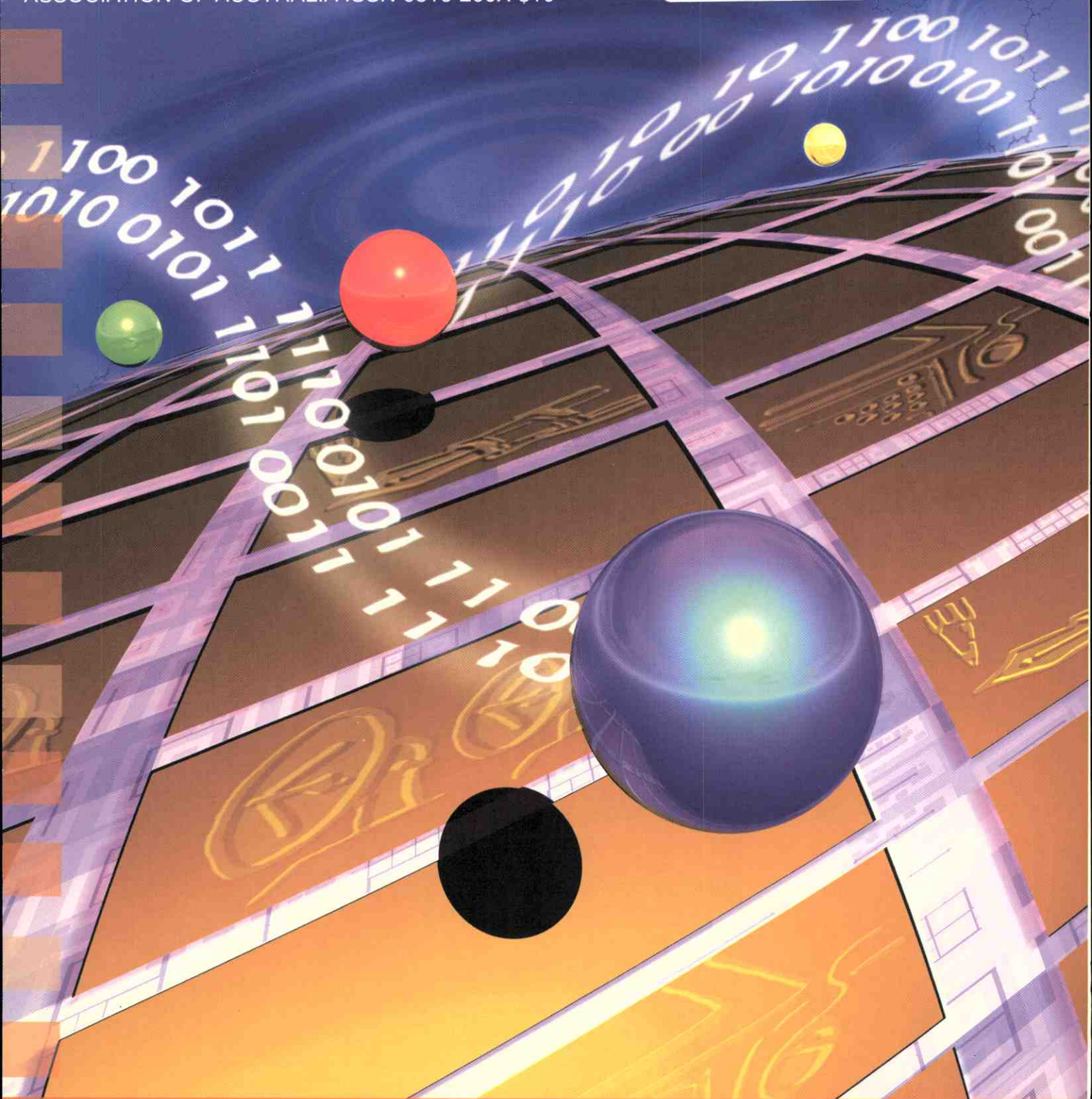
INFORMAA

QUARTERLY

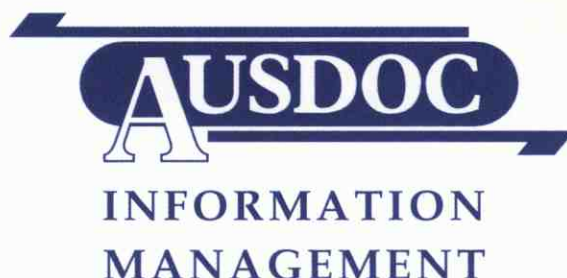
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ASSOCIATION OF AUSTRALIA ISSN 0816-200X \$10



RMAA Convention Report Perth 1997



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President's Message



At the recent meeting of the Federal Board held in Perth in conjunction with the 14th National Convention, the Board sought to embark on a course of action that will build on previous efforts to:

- remain accountable to the membership of the Association;
- strive towards greater administrative responsibility both at the Federal and State/Territory levels; and most importantly
- provide a better level of service to the membership.

In the Annual Report of the Association some of the key achievements during 1996/97 were mentioned and I have every confidence that we can do better during 1997/98.

During the Annual General Meeting a question was asked by a concerned member from New South Wales regarding the marked increase in expenditure related to travelling and meeting expenses for 1996/97, being a +\$48,826.

These figures shown in the financial report are national consolidated figures and should not be misconstrued as being "Federal" only. For example, the Association undertook to financially support the competency standards project, and during the last twelve months that support has weighed heavily on the Association and all for the good of our membership in the long term. The support is also considered as being part of our industries contribution towards the project.

To those members and non members who attended the 14th National Convention held recently in Perth, I would like to take this opportunity in thanking you for your wonderful participation and hope that you all found the program stimulating from all perspectives.

On your behalf a very special congratulations and thanks must be offered to the small but effective organising committee of the 14th National Convention. Once again a small dedicated and professional group proved their worth and I would like to publicly acknowledge the contribution of the following members:

Neil Granland (Co-ordinator)
Vicky Wilson
Gail Murphy
Norma Easthorpe
The management and staff of Congress West.

Well done!!

Lets now push on in 1997/98. I look forward to communicating with you during the next twelve months through the pages of the INFORMAA Quarterly.

Ray Holswich
ARMA
Federal President

CALL FOR PAPERS

Readers are invited to submit articles for publication. They may be in the form of case studies, conference papers, book reviews, surveys or any report which may be of national interest.

Contributions should be typed & double spaced. Please include a short biography together with a black and white photograph.

Submissions may also be made in electronic format on a 3 1/2 inch diskette with Wordperfect 5.1 preferred or alternatively as a standard ASCII text file from other word processing software.

Send articles to
Ken Ridley, National Coordinator
Quarterly Editorial Committee,
PO Box 8213
Perth Business Centre
PERTH WA 6849

Deadline for the
February 1998 issue:
19th December 1997

Editorial



Historically, RMAA conventions have not been controversial. Not so in Perth 1997!

Luciana Duranti, the keynote speaker from the University of British Columbia, Canada, challenged the records continuum theory and the concept of "records keeping" including records management and archives management. She argued that records keeping is primarily concerned with the activity of "keeping a record of action as carried out by a creator on its own records, rather than with the control of semiactive and inactive records".

It was most enlightening to hear a clear distinction being made between the creator and the preserver with different parties to be accountable for different functions.

Maggie Exon from Curtin University presented a comprehensive paper on the records management thesaurus and commented on the importance of classifying for retrieval by subject rather than by function. She spoke of "an alarming tendency to see functional analysis as somehow

replacing subject analysis". Her paper has been published in this edition as we believe that classification and retrieval are critical records management activities and no doubt further debate will ensue.

With so much theory being expounded about how to manage electronic records, it is refreshing to note a case study about a practitioner actually implementing electronic records management in an organisation and we are pleased to publish Chris Fripp's paper about his remarkable work in Sutherland Shire Council in New South Wales.

National conventions should stimulate debate and I am sure Perth did that; after all, in such a young profession, it is essential that we hear balanced arguments from differing points of view that will, ultimately, contribute to the theory that has often been said to be so lacking in records management.

Ken Ridley ARMA
National Coordinator
Informaa Quarterly

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through Branch Meetings,
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Conventions & Networking
with people who speak
"your language".

Join the RMAA

Letters to the Editor

Dear Ken

At the Association's National Convention in Perth in September, Dr Maggie Exon presented a paper which contained extensive criticism of our general records management thesaurus product, Keyword AAA.

The fact that we had no prior warning nor the opportunity to respond in any considered way is a matter of great concern to us. You have kindly agreed to publish our response in the Informaa Quarterly. Unfortunately, the deadline for the November issue makes it impossible to prepare a considered response in the time available, especially since we plan to place Keyword AAA in the context

of modern records management theory and practice, in addition to discussing the issues raised in Dr Exon's paper. We will submit our paper for the following issue.

Meanwhile, I wish readers to know that we stand by Keyword AAA and the theory and practice on which it is founded and that we believe the confidence of its many users in the product is well placed.

We welcome the opportunity for healthy and vigorous debate of the issues raised in Dr Exon's paper, despite the manner in which the opportunity has arisen. We propose to pursue the matter in that spirit.

I would appreciate it if you could publish this letter in the November issue.

Regards
David Roberts
Manager
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OFFICE
30 September 1997

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Informaa needs your help to report on new faces that are emerging in the Records Management Industry.

In the next edition of Informaa there will be a section that reports on new people with new ideas. If you or anyone you know has recently changed positions or developed a new idea for records management, Informaa would like to know about it.

All you need to do is send us a photograph and fifty words and we will consider it for printing in Informaa.

Deadline for copy and photos for February 1998 issue:
19th December 1997

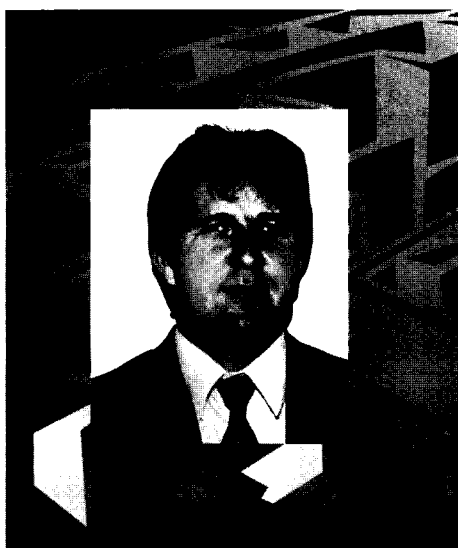
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The Recordkeeping

Future

Sutherland Shire Council and the electronic challenge



Author Chris Fripp

Chris Fripp is the Corporate Records and Archives Co-ordinator at Sutherland Shire Council. Sutherland Shire Council is the 2nd largest council in NSW. Previous to that Chris was the manager of Records and Archives at the NSW Department of Transport. Chris specialises in the implementation of computerised records and document management systems. Chris implemented the first Document Management System in Australia that fully integrated electronic and physical records at the Department of Transport.

Chris has had experience in Commonwealth, State and now Local government organisations and has been running records management training courses for all levels of staff since 1987.

Introduction

I was employed by Sutherland Shire Council (second largest council in NSW) in 1995 to co-ordinate and develop Council's corporate records into the next century. The three main roles I took on were:

- 1 To advise Council on a strategy for substantial reform of its records management services and to manage the introduction of modern records management systems;
- 2 To establish corporate policies and guidelines for registration, storage and retrieval of Council's records regardless of format;
- 3 To review and define functional and process requirements for an integrated records management / document management system to support:
 - on-line access to corporate wide index of Council's records;
 - exchange of data to/from Council applications, including registration of items to file as a by-product or other tasks in the workflow;
 - requests/tracking and distribution for any remaining hard copy files.

In parallel with the above, implement staff initiatives for improvements to current procedures for maintenance and handling of paper files and organisation of storage space in all locations.

The Council keeps its Building & Development application records on a mainframe application called 'Citipac';

Subject files were also on the mainframe, but using an application called 'Netmaster', incoming letters were placed in a module of 'Netmaster'. Letters relating to either Building and/or Development applications, were also registered onto 'Netmaster' because 'Citipac' did not have a correspondence tracking system. The problem – 'Citipac' does not communicate with 'Netmaster' or vice versa.

Confused? Wait there's more. To search for a letter on 'Netmaster' you must know the letter number. This six digit number allocated by the records staff (by use of a numbering machine) at time of registration is typed into 'Netmaster'. This is the only way of retrieving that letter. But if you get desperate, you could look in the alphabetical computer print-out of all the letters in author order.

Once a letter was attached to a file, it was deleted off the system. In other words letters could only be tracked whilst they were loose. So, Sutherland Council pretended to be computerised, but in reality was manually driven with dozens of computer print-outs (min. 10 cm thick); 'Where is it books'; and memories of the staff who have remained loyal to the cause for the last 20 years.

The Challenge

The challenge was to implement a strategy for substantial reform of Sutherland Shire Council's records management services and to manage the introduction of modern records management systems.

This challenge was to cover all corporate documents, not just the central registry. Council staff should be able to retrieve information from various applications such as; word processing, spreadsheets, images, physical files, loose papers, facsimile, E-mail and Lotus Notes, **from one single search screen.**

"An office that can share information simultaneously, regardless of the format, without leaving your desk!"
... "I'd like to see that?"

"Electronic documents being attached to virtual files!"
... "I'd like to see that?"

"Council Archives stored and retrieved from CD-ROM!"
... "I'd like to see that?"

The usual changes were made; introduction of new 355 gsm standard lateral file covers, combined with colour coding and barcoding; modern file housing; the introduction of RecFind – a PC windows based records management software product; and the introduction of a thesaurus.

But this conversion was to cover all corporate documents, not just the central registry. Council staff needed to retrieve information from various applications such as; word processing, spreadsheets, images, physical files, loose papers, facsimile, E-mail and LotusNotes, **from one single search screen.**

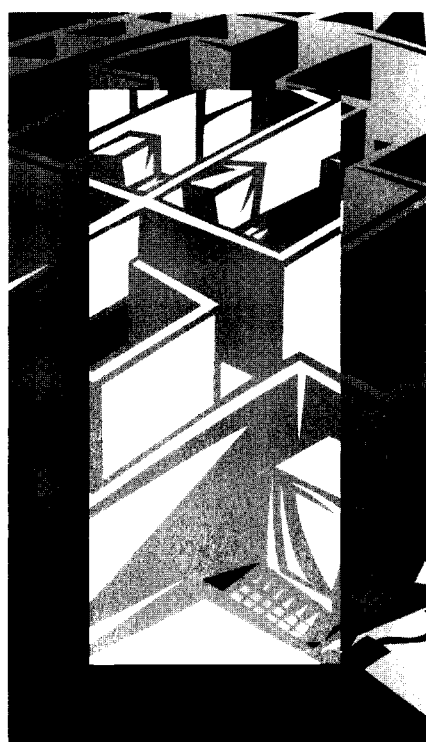
The standard reaction was to fix up 'Central Registry' and put the rest in the too hard basket. The real challenge was to be pro-active, and take control of all information regardless of the format, and set standards and policies for how information will be entered and retrieved.

Standards

To a large extent the 'corporate memory' of the Council's information holdings was resident with the individual, with no comprehensive view of the data

holdings in existence, so standards were introduced in the following areas:

- File Titles – using a Thesaurus
- Software – using RecFind Corporate
- Housing – using open bay shelving and/or receding door cabinets
- File Covers – white 355 gsm with colour coding on end tabs
- Imaging – using 2 x Canon Fridays and a A3 scanner
- Workflow – using Lotus Notes for E-mail, Complaints system,
- Electronic Business Papers, and



Halls & Bookings

- Microsoft Office – using Word, Excel, Powerpoint and Access

Imaging and workflow must go hand in hand with a records management system and an electronic document management system. Application software is needed. Thus all these applications could not be viewed separately but as an integral part of the records management strategy.

Policy

Major benefits can flow from improving the time taken to retrieve files meaning that staff spend less time

filing, sorting, routing and matching documents, giving better customer service through reducing the time to respond to queries and generally reducing the cost of maintaining a significant information repository.

The Key areas that needed to be considered in developing a records management strategy for the Council were:

- **Document Retrieval** facilities for indexing and retrieval of documents in either paper or electronic form. This also includes standardised file titling using a thesaurus; standardised records management software programs; improved file housing and storage of current documents. RecFind Corporate is installed and conversions are continuing, thesaurus is in place and storage has been improved.

- **Archival Program** to comply with Government directives concerning the preservation of records. This includes culling, boxing and listing of files stored in off site storage and improvement in the retrieval of inactive records. RecFind Corporate has a very good Archiving module.

- **Information Repository** to provide a Council wide data repository that contains references to the information holdings and supports keyword and phrase searching capabilities, document abstracts and in some cases, full texts. Various Document management systems will support this.

- **Imaging facilities** to facilitate the transfer and retrieval of information within the Council and reduce storage space. This includes the imaging of short and long term retention documents, such documents have been listed below.

Areas identified as suitable for imaging included:

- 1 Aerial Photographs (high quality)
- 2 Building Certificates 317a;

- 3 Building Registers 1949 – 1992;
- 4 Colour and Black & White Photographs
- 5 Completed Building and Development application forms 1949 – 1992;
- 6 Detour newsletters;
- 7 Development Consents;
- 8 General Fund receipts;
- 9 Government Gazettes 1915 – present;
- 10 Legal Documents;
- 11 Letter Registers 1940 – 1992;
- 12 Newspaper Clippings;
- 13 Plans;
- 14 Rate Notices
- 15 S11 Files – ex-employees;
- 16 Shop Licences;
- 17 Time sheets, flex and leave forms
- 18 Training applications;

95% of the above items identified, have long retention requirements and low retrieval, thus storage is not required on line. In a lot of cases retrieval is only required by individual

sections, thus the need to send images across the network is eliminated. An appropriate long term objective for the Council's Records Archives and Information Management Strategy (RAIMS) is to enable information retrieval from the desk top for intra-council generated documents and for speedy retrieval in 'hard copy' form of external documents that are tracked across the Council efficiently.

This objective would move the Council towards the idea of electronic document management. It will need to strike a balance with traditional 'paper based' records systems in favour of electronic text and image based information storage and retrieval systems over the long term.

Current Situation – Imaging

Individual sections each have a CD-ROM to access their information. Retrieval time is reduced from many hours to less than 10 minutes.

Colour photographs, kept in the Local Studies area, will be scanned on the existing HP Scanjets using RecFind as the index. The Council's art collection will also be on RecFind, thus RecFind is being used as the standard index for information and associated images.

Large plans and drawings needed an A0 scanner. These plans can be scanned and indexed using a Scanning Service Bureau, an approximate cost to scan plans is \$90 per hour or \$7.50 per plan. On a conservative guess of 30,000 plans the cost of the bureau would be \$225,000. Plus to supply onto CDs, the initial copy is \$150 and \$60 for each additional copy. An approximate cost for CDs is \$1,680. Council decided to purchase an A0 scanner. A company called Intergraph can supply an A0 black & white scanner (model SLI 3840) using a Tiff format for only \$20,220 (as at December 1996).

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Building and development applications which are also kept on RecFind, will be scanned using a combination of the HP Scanjet and the A0 scanner. When disk space on the image server becomes low, images will then be down loaded onto CD-ROM.

At present the Records Management Unit is using imaging for reduction of storage space in the office as well as the archives area. This is primarily done using the Canon CF 510 high speed scanner (50 pages per minute double sided). Images are stored on magneto optical disks which can store up to 12,000 A4 sheets of paper per disk. Images at present can be retrieved either from the CF 510, from a PC located at the inquiry counter of records, or over the network using the image server using a disk stacker. Later on this year a 100 disk juke box will be purchased.

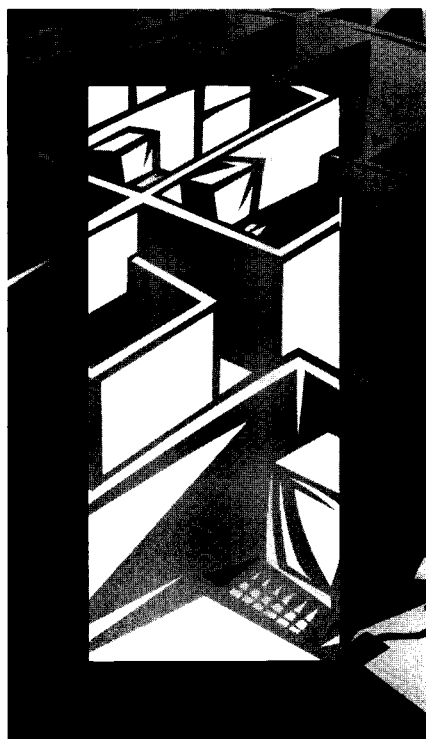
The storage of images onto CD- ROM is becoming a more viable proposition. Good quality CD's are cheaper \$20 – \$30 each, compared with \$200 for magneto optical disks. Magneto optical disks can be written to many times, thus the Council can re-use the magneto optical disks and down load the information onto CD- ROM. Individual groups can be allocated CD drives or if required access to the Jukebox. CD's are written to an international standard and as such can be read by any PC with a CD-ROM drive.

Time sheets, flex and leave forms for 1993 – 1997 have been placed onto CD-ROM and the originals destroyed. This alone has meant a saving in floor space of 6 sq metres per annum. Commercial rental rates for Sutherland are approximately \$250 per sq metre, this has meant a saving of \$1,500 PA or \$22,500 over 5 years.

Recently hard copies of these forms were required. Comments were made to the ease of retrieval and that the

copies were better than the original. The other area that the Records Management Unit is using imaging is in scanning the corporate incoming correspondence. This is done using Hewlett Packard Scanjet 3c scanners directly into RecFind. RecFind manages the image directory using TIFF files.

Correspondence received is entered onto RecFind completing fields such as letter received; workflow actions; file number; etc. and the original document is scanned, using a HP Scanjet. As



this document has been captured on RecFind the original letter is kept for 1 month then destroyed .

Using the Workflow functions within RecFind, this document is allocated to an action officer, which can be monitored by his/her supervisor. The action officer views his/her 'To Do List' on a daily basis to find all the work allocated.

While the action officer is preparing a response, the records staff have sent off an acknowledgment letter (automatically generated). When the action officer has completed the response he/she has to

make a conscious decision to whether the document is a workgroup document and will be kept with the workgroup directory or it is a corporate document and must be placed on file.

To place on file, the action officer clicks the RecFind icon and attaches the document electronically. In other words **no hard copy** is sent to records.

Users no longer come to records looking for a file and attempt to find a piece of correspondence within it. From their desk, they can do a search for a file or a document. A search for a file on 'councillors remuneration' would give you, say 15 hits. The user selects the required file. This gives the user the name of the file, the file number and physical location of the hard copy file, plus a list of all correspondence attached to that file (scanned, electronic or abstract).

The user can scroll through the list (which is in chronological date received order) and look at an abstract of the document and pick up a few more details such as author, workflow actions, date written. If the user still needs to see the original document then they click on the 'Attach Document' button and the image is displayed.

Current Situation –

Customer Request Management System

Lotus Notes is a tool which allows the Council to compose, co-ordinate and collate requests from the public, councillors, and staff. It allows users to view requests in a number of different ways, print reports, search through requests and much more.

Database applications or Notes databases are built using Lotus Notes. Sutherland Shire Council is using a Customer Request Management System (CRMS), Electronic Business Papers (EBP), and very soon Halls & Parks Bookings (HPB). Basically these databases are a collection of related documents stored in a single file.

The Sutherland CRMS has been designed to make the processing of customer requests (complaints) as easy as possible. It is also an effective management tool, recording the number and type of request handled. Requests can be easily responded to and checked. The system will then automatically escalate unactioned items of business. The features of the system are accessed via pull-down menus and smart icons, allowing users to familiarise themselves with the system quickly. All information held is based on a request type (or Keyword structure), with the relevant officer being notified automatically via E-mail.

The databases can be searched by a single word or multiple criteria. Requests can also be viewed based on a number of criteria including historical period, actions, council facilities, area and urgency.

Sutherland Shire Council can now track all requests (an average of 3000 per month) based on request type and service standard. Prior to the system, it was unknown how long a job took, whether the request had been attended to or not, etc.

All requests prior to the CRMS were received by phone, then hand written onto a pink form. This form was then passed onto someone to decide who should do the work. If for example a park was to be mowed, the request would go to the depot for processing. The gangs at the depot would group them together and actioned them as they remembered. Obviously some were lost or misplaced and the customer would ring again, lodging yet another request, so duplicate requests were not uncommon.

On an average each request would generate 5 pieces of paper which would then be filed onto a Health & Building file. 5 times 3000 per month = 15,000 pages per month or 180,000 pages per annum.

With the introduction of the CRMS in May 1996, all requests are now processed electronically. Thus the filing of 180,000 pieces of paper each year was eliminated. Health & Building files no longer exist as hard copy files, but as 'Virtual Files'.

With the introduction of EBP in 1997, all Councillors were issued with laptop computers, modems, and printers. 40% of the paper work involved with the processing of business papers has also been eliminated.

Minutes of meetings, agendas, attachments, maps, etc. are now issued on-line. Any hard copy attachments are scanned and attached electronically. The combination of these two applications have reduced paper work within the Council by 60%.

Current Situation - Document Management System

There is a strong need to have the ability to index and retrieve information on a global basis across different types of documentation stored in the system. This not only refers to images but also E-Mail, Facsimile, Word Processing, Desk Top Publishing, Spreadsheets, Databases and Work Flow Systems.

The only way that the Council will be able to retrieve and index all information in various formats is through the introduction of a Document Management System, (DMS). The DMS sits over the top of all the application, and the user has the ability to retrieve information without knowing its source (who wrote it), format (image, WP, Spreadsheet) and where it is stored (which drive or disk).

Until a DMS is put in place, the integration of the RecFind and Canon index is being investigated as a viable solution. In the short term, users will need to look in three indexes to access a document, that is (RecFind, Lotus Notes, Canon Imaging).

Full marks for Perth

What more to say about the 14th RMAA Convention last month than 'Congratulations all round'.

The RMAA goes from strength to strength as the annual event for Australia's RM professionals. Papers and presentations were top-notch. This year no less than 439 delegates came from all over, Perth proving a stunning success, and we're proud to have been part of it.

So much to show

Our Stand 23 out west was limited by the tyranny of distance. Demo's focused on the Canon MS500 Microfilm Scanner - the new digital gateway that means you 'film first, then scan on demand'.

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There are three options available for those who are prepared to take on the challenge;

Implement some naming conventions and give users a set of guidelines on what constitutes a corporate, workgroup or personal document.

If you can not afford a DMS or have limited resources this option is a good start. The reliance is still on the users, there is no control where the user stores the document or what the document is called. Commence a DMS User Group and get people discussing some standards. Why wait for the IT section to initiate it, be PRO-ACTIVE.

Disabling the 'A' drive, can control viruses and assists in capturing incoming and outgoing documents. Set up specific directory structures and do not back up 'C' drive, as this forces people to save documents in correct directories.

examples would be

- g:\worddata\records\staff\...
(for Word documents)
- or g:\excedata\records\staff\...
(for Excel documents)
- or g:\ppdata\records\staff\...
(for Power Point documents)

This structure shows the drive letter, the application, the workgroup, staff or manager, then user.

Implement a Records Management System that integrates with electronic applications.

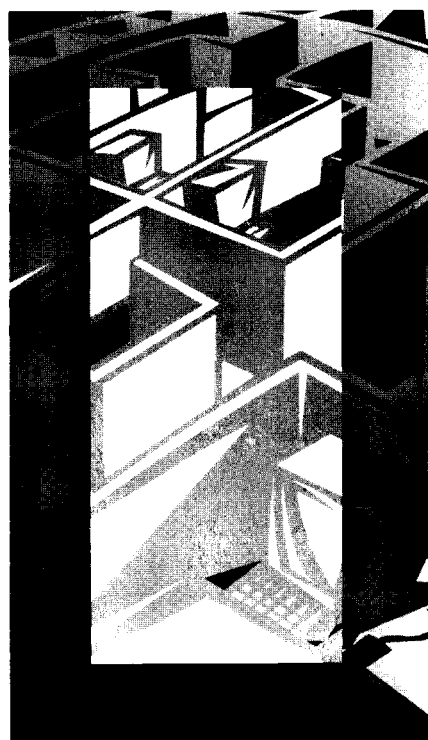
A number of good records management software programs are saying they can do this or will be able to do it shortly. Sutherland Shire Council is using RecFind Corporate.

A recent addition called 'Desktop Integration' provides users the ability to save a word processing document (WordPerfect, Word, Ami-Pro) or a spreadsheet (Excel, Lotus) directly

into RecFind from within the native application.

Once again the user has to make a choice, is this an important document or not, and as such, should a copy be put on file? The attachment of the document is done electronically, so the traditional method of taking a hard copy and sending to 'Records' is eliminated.

An icon appears within the word processing application, the user clicks



on this and a modified index screen appears, the user types in a file number, author & abstract. Click on OK and the electronic document is now linked to the physical file.

Implement a Document Management System (DMS) over the top of all your applications.

Document Management Systems for managing electronic documents have been around for a long time, mainly used by the legal profession. More recently they have been merging into the world of records management. Just as records management Software is

merging into the world of Document Management.

Document Management is the means of organising and controlling the information created in wordprocessing, spreadsheet, and graphic applications, as well as external documents, images, and multimedia objects. By eliminating the time wasted recreating or searching for 'lost' documents scattered throughout countless directories and subdirectories. The increased capability of individuals and workgroups to share collective knowledge dramatically improves the quality of products and services.

The cost effective investment in Document Management Systems results in shared information, increased corporate knowledge, and improved work quality.

One cost justification for a DMS is to work out how much is spent on looking for lost documents, either hard copy or electronic. If you work it out, 10 minutes per day per person is spent looking for lost documents, you will find that an organisation with 400 employees wastes around \$180,000 per annum.

The main players at the moment are Soft Solutions, Canon Exchange, Documentum, Objective, Data Works, Lotus Notes Domino, Saros and Docs Open. Other products are appearing every day with various good and bad points.

Legislation

Every State Government has its own legislation in regard to the Evidence Act. Since September 1995, at least NSW and the Commonwealth Government now agree on the Acts and have introduced common legislation.

The new legislation covers the admissibility of evidence in court. It is independent of media so optical disk, magnetic tape, microfilm, paper,

computer hard disk, diskettes, CD-ROM etc. are now all legally admissible but are not equal under challenge.

Conclusion

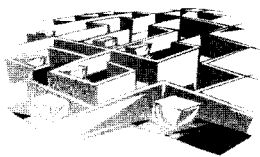
At Sutherland Shire Council a number of office systems initiatives have been introduced. The Council has moved to the Microsoft suite of products (Word, Excel, Powerpoint, Access); RecFind, Imaging using the Canon Friday 510's, and Lotus Notes has being introduced, as well as a conversion to lateral colour coded files; and the introduction of a 'one stop shop' (front counter) and the building was totally refurbished. This was all accomplished within the 18 months.

While paper work has been eliminated completely in some areas and reduced by 60% in other areas, I feel that the Council will never be totally paper-less. My personal preference is to keep Building and Development application files in the paper format. It is still easier and more user friendly to take the file to an inspection and read a plan with a client rather than on a lap top.

The next stage is to implement a DMS system, as there is still a strong need to have a product that sits over the top of all our applications that is not concerned with format or where it is stored.

Sutherland Shire Council has taken a forward looking approach to the problem of integrating all information applications with the ability to search via one search screen from the desktop.

There are lots of good products on the market now, so as diligent records managers, be pro-active and take the challenge – see how many paper processes you can eliminate.



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CONTEMPORARY RECORDKEEPING

The Records Management Thesaurus



Author
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Maggie teaches in the fields of information retrieval, records management and the relationship between information and society and has practical experience of thesaurus construction.

Abstract

Thesauruses designed for use by records systems have taken a very different course from other controlled indexing languages, leading to a number of potential problems for developers of records management systems. The opportunities for using existing database thesauruses as a source of indexing terms is reduced. Understanding of the structure of different indexing languages may suffer because of a lack of agreement about the meaning of technical indexing terminology. The emphasis on functional analysis as a basis for thesaurus creation can lead to long file titles containing terms which are redundant for retrieval purposes. In addition, records managers may be asking too much of a thesaurus that it acts both as a retrieval tool and as a basis for managing decisions such as scheduling and disposal. This paper examines these issues from the point of view of established retrieval theory.

Paper

There are hundreds of published indexing languages which call themselves

thesauruses: some are famous and have been continually updated, such as the Thesaurus of ERIC descriptors (covering educational terms) and the INSPEC thesaurus (covering electrical engineering). Others are produced in one edition and are never updated. These thesauruses are almost without exception used for the indexing of published materials, in particular individual articles in journals and periodicals and individual papers in published conference proceedings. These thesauruses are located in the realm of information dominated by librarians and documentation specialists, and are often referred to as database thesauruses.

There are also hundreds of indexing languages called thesauruses used in records management, especially in Australia. These are rarely published because each records management situation is unique and most of the information indexed using the thesaurus can only be accessed by staff of the organisation. However, a number of these thesauruses are based on a 'published' or at least widely distributed and licensed thesaurus of management terms; the first version of this was called the General administrative thesaurus (GADM) (Thesaurus, 1991) and the current version Keyword AAA (Keyword, 1995). These thesauruses and those based on them may be used to create structured file titles in the keyword file titling method.

A casual glance at examples of the first class of thesaurus in comparison with Keyword AAA will give the impression that they are very similar in structure and that they are

therefore the same kind of indexing language. The similarities are quite clear: both list terms to be used in indexing in alphabetical order. Under each term is a system of references which links terms together. An example of an entry in Keyword AAA (omitting the scope note and non-preferred term relationship) is:

CAPITAL WORKS

Broader Term:

Asset management

Narrower term:

Contracts
Economic appraisal
Environmental Impact
Statement/Studies (EIS)
Expenditure
Investments

Related term:

Construction

This may be compared with an example from ERIC (much abbreviated and slightly re-arranged to show the comparison):

TEACHERS

BT Professional Personnel
NT Art teachers
Science Teachers
Special Education Teachers
RT Parent Teacher Cooperation
Teacher Aides
Teacher salaries

Apart from the fact that ERIC uses abbreviations (BT, NT, RT) whereas Keyword AAA uses the full phrase, Broader Term, Narrower Term and Related Term, there is little discernible difference between these entries.

In fact, these two thesauruses are totally and completely different. They are based on completely different approaches to indexing and they are not in any way compatible. It would be impossible to merge terms from the two thesauruses and achieve a result which makes any sense. The similarities are only skin deep.

To appreciate, this needs an understanding of aspects of the theory of subject indexing which may seem irrelevant, obscure and frequently incomprehensible. However, I believe that without such an understanding, records managers may find themselves on such a different track from other information professionals in the tools which they use for indexing that their ability to respond to increasingly integrated information handling will be reduced.

To put it baldly, the typical published thesaurus is a tool for use with systems which use post-coordinate indexing. The typical records management thesaurus is a tool for use with systems which use pre-coordinate indexing. At this point, anybody who has taken a formal course in subject analysis and retrieval theory will immediately groan. At Curtin University, examinations in the unit which covers basic retrieval theory always contain the question "Explain as briefly as possible the essential differences between post-coordinate and pre-coordinate indexing languages". Despite the fact that all students are told that this question will be asked, a significant proportion always fails to answer the question satisfactorily. The difference is that difficult to explain. However, I will try to do so now because it is fundamental to my argument.

Post-coordinate and pre-coordinate indexing

Suppose that a document is about the maintenance of photocopiers. This document is to be described and indexed in a database which has a field (called *Subject Descriptor*) set aside for terms from a controlled indexing language.

As many terms as may be desired can be entered in this field and in this case the two terms **Maintenance** and **Photocopiers** are entered. Supposing a user of the system wishes to locate a document about the maintenance of photocopiers. A search is conducted in which the software is asked to locate records which contain the term **Maintenance** AND the term **Photocopiers** in the *Subject Descriptor* field. The 'AND' link is a Boolean operator. The Boolean operators AND, OR and NOT allow you to link terms at the search stage in a post-coordinate indexing system.

The actual algorithms used to undertake such a search vary, but they are all ultimately based on set theory. The computer derives a set of documents which are indexed by the first term and a set of documents which are indexed by the second term. Any document which appears in both sets will satisfy the search. The important point is that the results

of the search will be the same whichever set is evaluated first. It does not matter if the indexer lists the terms in the order **Maintenance Photocopiers** or in the order **Photocopiers Maintenance**. Each indexing term 'floats free' of the other and is independent for searching purposes. This is a post-coordinate indexing system.

It is very different if you wish to make up a file which will contain documents about the maintenance of photocopiers and you want to give this file a definitive title which describes its contents. The file title is a single unit. If it contains the two relevant terms a decision will need to be made as to whether the title of the file will first cite the concept Maintenance or first cite the concept Photocopiers. In the first case the final file title will be:

Maintenance – Photocopiers and in the second case the file title will be **Photocopiers – Maintenance**.



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This choice of order, called the *citation order*, is clearly important in file titling. Inconsistent choices in citation order lead to file titling systems which are difficult to understand and which produce odd effects especially when a list of files is output in alphabetical order. In keyword file titling systems, the rule that one of a designated list of keywords must always be used first in a file title is a citation order rule.

Such file titling systems are pre-coordinate systems. A pre-coordinate indexing language does two jobs.

- It tells you what terms to use for a particular concept, for example which to use of such terms as **Employees, Human Resources, Personnel**.
- It tells you what order to use when joining together more than one chosen term; that is, it indicates what citation order to use.

A post-coordinate indexing language does only the first of these jobs because the second is not necessary. A computer searching using the Boolean operators AND, OR and NOT, can search efficiently without the chosen terms being in a particular order.

GADM as a pre-coordinate indexing language

When the *General administrative thesaurus* (GADM) first appeared it was clearly a pre-coordinate system. It consisted of a list of acceptable terminology (with references from unacceptable terminology) for use in file titles, together with four basic devices for fixing a citation order, in which these terms might be joined together in order to create file titles. These four devices were:

- instruction that certain terms were keywords and all file titles should begin with a keyword;
- lists of descriptors under keywords

which could be used after that keyword;

SALARIES

DE

ACCOUNTAB DOCUMENTS

ADJUSTMENTS

etc.

- notes under certain entries in the thesaurus as to the possible combination of that term with others;

IMMIGRANTS

Persons whose life is influenced by a social and cultural background that is not exclusively Australian. This applied to persons who migrate to Australia for the purpose of permanent residence, and to their Australia-born children. Use as a descriptor *after* [my italics] the subject. E.g. UNIONS-MEMBERSHIP - IMMIGRANTS.

- a specific instruction under some complex phrases that a particular combination of simpler terms in a particular order was to be used instead.

FOUR DRAWER FILING CABINETS

Use EQUIPMENT - CABINETS - FILING

The layout and use of abbreviations in GADM was like no other thesaurus. It showed clearly that it was undertaking a different job from all previously published thesauruses and even from existing pre-coordinate indexing languages in the library field such as the *Library of Congress Subject Headings*. It was unique.

Keyword AAA as a pre-coordinate indexing language

Keyword AAA is a completely revised thesaurus which has replaced GADM and has a different basis for its subject analysis. However, it is still an embodiment of keyword file titling and it is still a pre-coordinate indexing language. The biggest outward change is that it has adopted a different and much simpler way of indicating citation order.

Faced for example, with the need to create a file for bookings of hotels for corporate travel, you might look up underhotels, where you will find the following entry:

Hotels/Motels

Top term

TRAVEL

Broader term

BOOKINGS

The meaning of this is quite clear. If you wish to use the term Hotels/Motels it must follow the term Bookings. The reference to the Top term is an indication of the keyword which should go at the beginning of the file title. This link will be confirmed if you look at the entry for Bookings, where will be found:

Bookings

Broader term

COMMUNITY RELATIONS

EQUIPMENT

FLEET MANAGEMENT

TRAVEL

The full and complete file title will be:

Travel - Bookings - Hotels/Motels

This file title could also have been built up from the keyword if the process had been started by looking up the keyword, Travel. Here will be found:

Travel

Narrower term

ALLOWANCES

ARRANGEMENTS

AUTHORISATION

BOOKINGS

COMPLIANCE

CONFERENCES

PROCEDURES

REPORTING

This list of terms is a list of those which can follow the keyword **Travel** in a file title. Clearly **Bookings** is

what is wanted here. We then look up Bookings and find:

Bookings

Narrower term
Hotels/Motels

The resulting file title is, as would be hoped, the same – **Travel – Bookings – Hotels/Motels**.

Where did this system of using the phrases *broader term* and *narrower term* come from? The editors of *Keyword AAA* are quite clear on this point. One of the strategies adopted by them to transform GADM into the new thesaurus was a process of “revising rules and bringing structures and codings into line with ISO 2788 – 1986(E) *Documentation – Guidelines for the establishment and development of monolingual thesauri*”. (Keyword AAA, 1995, Introduction, p.5). In addition, they also state that they have imposed a “hierarchical relationship between the keywords and the activity descriptors, which was not evident in the GADM thesaurus”. Hierarchies lie at the heart of the guidelines embodied in the International Standards Organisation (ISO) standard referred to in *Keyword AAA* (British Standards Institute, 1987), so these two statements are linked in meaning and import.

The ISO standard and post-coordinate indexing

There is a real mystery here. The ISO standard definitely states that it is a standard for the construction of post-coordinate indexing languages. The introduction to the standard makes it clear that it is in no way concerned with the problems of citation order in pre-coordinate languages (see full text from the introduction at the appendix to this paper). It is not applicable to the relationships between terms which are joined together to describe the whole content of documents, or, by implication, of collections of documents placed in files.

Yet it is from the ISO standard that the editors of *Keyword AAA* have obtained their authority for the use of broader term, narrower term and related term to express links between terms (although in the standard these are abbreviated to BT, NT and RT). In *Keyword AAA* these structures are used to impose citation order in a pre-coordinate system designed to explain the content of files and documents, by linking separate concepts into one unit. In the ISO standard they are clearly not to be used in this way. It is therefore necessary that the meaning of BT, NT and RT in the standard is clearly understood.

These links are used to express relationships between terms which are based on the meanings of those terms. BT and NT are used to link terms which have the same kind of meaning but are broader or narrower in scope (hierarchical relationships). An example of such a relationship might be:



Diseases

NT Influenza
Tuberculosis

Influenza

BT Diseases

Tuberculosis

BT Diseases

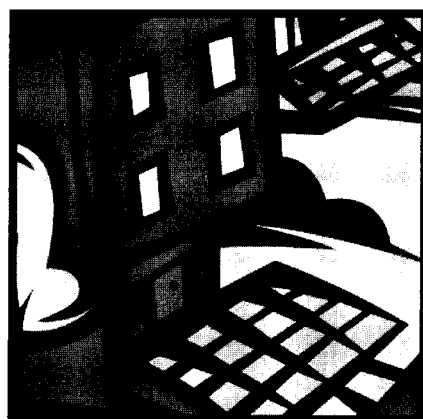
This relationship is a hierarchical relationship. It is absolutely clear which is the broader term and which are the narrower terms. Not all diseases are tuberculosis but all occurrences and types of tuberculosis are a manifestation of disease. Related term relationships (also called *associative* relationship) are also based on meaning, but the terms are not from the same category (in technical terms *facet*) of the subject, as in

Custodial sentences

RT Prisons

Prisons

RT Custodial sentences



Contrast the diseases example given above with the relationship between **Influenza**, **Treatment**, and **Antibiotics** in a document about the use of antibiotics to treat influenza. Here, there is no clear link in *meaning* between the terms. Influenza is a disease, treatment is a medical activity and antibiotics are a form of drug. It is perfectly possible to imagine a world in which antibiotics were never used to treat influenza and maybe that will happen in the future. By contrast nothing can ever stop influenza from being a disease because that is part of the structure of our language. In a standard thesaurus built on the principles laid down in the ISO standard, no link would be made between terms like influenza, treatment and antibiotics. The link would instead be made at the searching stage using Boolean operators. This is because the link between the three concepts is document-dependent. It is not inherent in the concepts themselves but arises because the document itself makes the link.

By contrast, the BT, NT and RT relationships described in the standard are pre-existing and do not depend on links being made in documents. They are designed to give a guide to the terminology of a subject area in order to aid the user in the choice of terms to index a document. Following up the web of relationships can help to home in on the most appropriate term. It can ensure that the term chosen is, as far as possible, co-extensive with the subject to be expressed. This process of choosing the best term will be undertaken for each important concept which appears in the document.

Almost all published thesauruses, however much they may differ in the details of their structure, conform to this concept of the meaning of hierarchical and associative relationships. Why don't database thesauruses make document based connections between terms which are not linked in meaning? It

is to avoid unnecessary repetition and restriction of the possibilities of linking terms which together express the content of a document. Post-coordinate indexing means that any combination of terms which you desire may be used to index a document. Therefore, there is no need to predict what those combinations might be in the future.

Hierarchies and false hierarchies

There is much confusion as to the meaning of hierarchy as used in retrieval theory. The ISO standard recognises only three types of hierarchy in thesauruses, genus-species relationships, whole-part relationships and instance relationships. Genus-species relationships recognise the link between terms for classes of things and terms for more specific kinds within that class:

Non-ferrous metals

NT Aluminium.

The other major type of hierarchy, whole-part, is less commonly found, but does occur:

Cardiovascular system

NT Heart.

The last type of hierarchy is not found at all in some thesauruses. It covers the relationship between classes of things and individual named instances of those things (such as that between **Dams** and **Aswan Dam**). Since proper names are often omitted from thesauruses, this is not an important part of the current argument.

It can be seen that hierarchical relationships are very limited. They certainly do not cover a combination of terms like **Travel** and **Procedures**, since procedures are neither a kind of travel nor a part of travel. It is clear that either order for these terms might make sense, whereas

Heart

NT Cardiovascular system

makes no sense at all. To describe the relationship between **Travel** (a *keyword* in *Keyword AAA*) and **Procedures** (an activity descriptor in *Keyword AAA*) as hierarchical is misleading. Yet this claim is made in the previously quoted description of a "hierarchical relationship between the keywords and the activity descriptors, which was not evident in the GADM thesaurus".

The practical difference between the two forms of indexing language.

Suppose you have in a thesaurus the entry

Term A

BT (or Broader term) **Term B**

If this were a records management thesaurus supporting keyword file titling, this would constitute an instruction to make the file title:

Term B – Term A

If this were a standard database thesaurus, this would be an invitation to consider these two terms with a view to choosing only one of them. Is **Term A** or **Term B** closer to the subject matter of the document? If **Term A** is chosen, **Term B** is not used at all. In order to express the complete subject of a document, you would possibly also need to use a term from some completely different part of the thesaurus, such as **Term C**. The same choosing process would be gone through for **Term C**, but, having been chosen, it would not be linked in any way to **Term A**.

Does this matter?

I believe this discrepancy between records management thesauruses and standard database thesauruses does matter for three reasons.

1. *Keyword AAA* only covers general management and administrative terms. Any organisation wishing to use this thesaurus for records management must add to it terms to cover the functional

aspects of the organisation. It might be considered that such terms could be derived from a published thesaurus in the relevant area, for example a thesaurus of education terminology for an educational organisation such as a state education department. However, thesauruses which have such different structures cannot easily be merged. Efficient file titles cannot be created by using the hierarchies of standard thesauruses as instructions to link terms together. Truly hierarchical BT and NT relationships will have to be stripped out so that citation orders between terms which are not connected in meaning can be expressed using the same BT and NT links.

2. It is not good for records management to cut itself off from the approaches used by other sectors of the information industry. We live in a converging world in which electronic storage is blurring the lines between different kinds of information. There needs to be increasing cooperation between different kinds of information professionals.

However, if the records management profession believes that it needs indexing languages which are different from those of other sectors, it should structure them in ways which are clearly distinguished. From this point of view, *GADM* was a more honest thesaurus than *Keyword AAA*, because it did not pretend that it was not a completely new form of indexing language, different from any which had gone

before. The change to a format based on *ISO 2788-1986(E)* has not served us well from this point of view, because it has artificially disguised the fact that keyword file titling has a very different purpose from post-coordinate indexing.

3. Post-coordinate methods of controlled, artificial indexing are inevitably going to become much more important in records management as direct retrieval of individual documents becomes more important. We need to be able to specify the subject of individual documents using as many free-floating indexing terms as seem desirable. We therefore need comprehensive, well-analysed bodies of terminology in which the problems of meaning are given priority. Concentrating on pre-coordinate systems diverts attention from these problems of meaning and makes it difficult to extend and maintain thesauruses as terminology changes and new subjects become important.

Functional analysis and information retrieval

In the last point made above, I suggested that we need post-coordinate indexing languages to use with document management systems in order to aid retrieval of individual documents. The major purpose of thesauruses has always been as an aid to efficient retrieval. I am increasingly coming to believe that the current emphasis on functional analysis has

been to the detriment of efficient retrieval.

I am well aware that, in saying this, I appear to be attacking a tenet that has become basic to our thinking about information retrieval. I am also aware that functional analysis has benefits in other aspects of records management including information audits, sentencing, archival accountability and the classification of documents into classes at the highest (keyword) level to reflect business functions. All of these are important. However, retrieval is a different activity and it has its own demands. In particular, it must take account of the way the mind works when retrieval is being undertaken.

One of the main distinctions between indexing terms is that between terms for concrete entities (those things which you can see and feel), terms for abstract entities (terms such as **Equal opportunity** and **Citizenship**) and terms for activities and processes. The work of the nineteenth-century classificationist Kaiser emphasised the need for citation orders which placed entities before processes/activities, because entities were more specific and were most likely to be sought. The preferred citation orders of later theorists such as Ranganathan and Coates were more complex developments of this basic order. (Foskett, 1982: p.5)

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The use of *activity descriptors* as the second level in all file titles places in an important position in the file title terms which are often not helpful for retrieval purposes and which add very little to the total effective meaning of the file title as a description of the content of the file. Among these activity descriptors are terms like **Meetings, Programs, Reporting, Operations** and **Control**, which have little value in a retrieval system because they are too unspecific and are unlikely to spring to the mind of the person wishing for information. Meanwhile, concrete terms which are likely to be sought are relegated to a lesser role at the end of the file title. This may not matter in a on-line system but certainly makes it more difficult to find what is wanted from an off-line printout of file titles in alphabetical order.

However, the down-grading of entity terms is more serious than this. The effect of a pre-coordinate system is to scatter materials to do with topics which come low down in the citation order. Since entities come low down in the citation order, they are scattered. This can be serious, particularly in smaller records operations. For example, it seems reasonable to me that smaller organisations might very well want to establish a file called:

Equipment – Photocopiers

This will gather together everything to do with photocopiers and will be quickly accessible to anyone who needs to know anything about where the photocopiers came from, how to work them and who to contact if they don't. It does not seem helpful to insist that one of the following terms must come between **Equipment** and **Photocopiers**:

- Acquisition
- Disposal
- Evaluation
- Installation
- Leasing
- Maintenance
- Usage

Smaller records systems could not justify a set of files for each of these aspects of looking after their photocopiers. If they just have general files called, for example, **Equipment – Maintenance** in which everything about maintenance goes, it will be very difficult to find the information which is specifically about the photocopiers.

There is another problem with the treatment of entities in *Keyword AAA*. The emphasis on functional and activity terms means that many terms for concrete and abstract entities are not included in the thesaurus at all. Photocopiers, for example, do not appear. Many free text additions must be made to file titles and this does not just apply to proper names. If inconsistency creeps into free text terms, this can adversely affect file titles. When generic terms (as opposed to proper names) do not appear in a thesaurus when they are needed for indexing purposes, the thesaurus loses much of its effectiveness. It is possible to establish rules and procedures for the format of proper names but it is less easy to ensure consistency in generic terms unless they actually appear in the thesaurus.

Two examples taken from the introduction to *Keyword AAA* exemplify the problems which have been discussed above. In section 2.1.3 of the Introduction (*Keyword AAA*, 1985, Introduction p.8), it is explained that the title of a file should “embody its *hierarchical classification* and place it in its *functional context* within the organisation. Thus titles should be representative of the record's *context* as well as its content”. [Original italics]

There then follow two file title examples which are presumably seen to embody these principles:

RECORDS MANAGEMENT –
PROGRAMS – Thesaurus – *survey*
summary: user feedback, April 1994

RECORDS MANAGEMENT –
REPORTING – Reports – *Thesaurus*
Post Implementation Review, June 1994

Am I naive in thinking that there is no good reason at all why these two documents should not be in the same file, or at least two files with the same lead-in terms? They are both key documents in the evaluation of the implementation of a thesaurus. I cannot see how the context of these documents is improved by the use of the words **Programs, Reporting** and **Reports** which have low meaning. It is not consistent to have *Thesaurus* as a term in one title but have to rely on it turning up in the free text segment in the other. The classification guide suggests that you may have a file title which subordinates **Thesaurus** to **Programs**, but the main alphabetical list suggests it should be subordinated to **Control**. The free text elements in both titles are specific and important parts but they are dependent on deriving terms from the documents themselves, and could easily be inconsistent.

The context of these documents is well established by the keyword **Records Management**. This is a major function and I have no problem with these top level terms being based on major functions. But it seems reasonable that the next most important term to attach to cover these documents is **Thesaurus**. Records Management provides sufficient context.

As I have already said, I am appreciative of the fact that such matters as responsibility for records and sentencing may be based on the function for which the records act as evidence. Purchasing records, maintenance reports, statistical reports and so on will be kept for varying periods of time and will be treated differently. However, the purpose of a filing system is to allow material to be retrieved and when it is

retrieved to tell a complete story. The complete story of thesaurus implementation in this organisation will be difficult and time consuming to piece together from the examples given here.

What should we do?

I believe that urgent action is needed to solve the problem of the differences between the two types of thesaurus. We need a layout which is clear and concise but which still manages to distinguish between thesaural relationships which are based on meaning and citation order instructions for the joining of terms together to express a complex subject.

In addition we need to bring back into records management a commitment to precise retrieval at the level of the document and begin to emphasise post-coordinate retrieval. This is the form of retrieval which most people are using today, for example on the Web. It will permeate all the document management systems of the future. As databases become larger, precise retrieval becomes more difficult to achieve and we need indexing languages which can deal with this problem.

We need to find a way that subject indexing and retrieval can sit with useful and efficient functional analysis. There is an alarming tendency to see functional analysis as somehow replacing subject analysis. I do not believe this is true. It is not necessary for records management thesauruses to take a path which cuts them off from the extensive body of experience and research in subject retrieval.

References

British Standards Institute. (1987) *British Standard guide to the establishment and development of monolingual thesauri: ISO title: Documentation – guidelines for the establishment and development of monolingual thesauri*. London: BSI. (BS 5723:1987 ; ISO 2788 – 1986).

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Educational Resources Information Center (ERIC). *Thesaurus of ERIC implementation* in this organisation will be difficult and time consuming to piece together from the examples given here.

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Appendix

Extract from the introduction to BS 5723:1987; ISO 2788-1986(E)

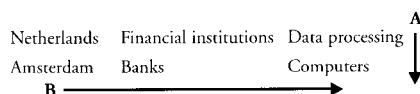
"Two kinds of inter-term relationships can be distinguished:

a) syntactical or a *posteriori* relationships between the terms which together summarise the subject of a document. For example, an indexer dealing with a work on "Computers in banking in Amsterdam" may assign the three terms, "Banks", "Computers" and "Amsterdam" to the document. In a post-coordinate system the relationship between these terms is not explicitly indicated, and the document would be retrieved if any or all of these terms were used as retrieval keys. In a pre-coordinated index the relationships between the terms may be conveyed in various ways, for example by symbols which express specific relationships, the position of terms within entries [my

italics], their typography and/or their accompanying punctuation. The terms in the example are not normally associated according to common frames of reference, and their interrelationships can therefore be regarded as document-dependent;

b) those *a priori* or thesaural relationships between terms assigned to documents and other terms which, because they form part of common and shared frames of reference, are present by implication. In the example above, "Banks" would imply a broader term such as "Financial institutions"; "Computers" is mentally associated with "Data processing"; and "Amsterdam" implies the wider location "Netherlands". Any of these mentally associated terms might serve as the user's approach to the subject index. These relationships are document independent, since they are generally recognised and could be established through reference to standard works, such as dictionaries and encyclopaedias.

The distinction between these two kinds of inter-term relationships can be displayed as follows:



A = *a posteriori* relationships between indexing terms assigned to a document.

B = *a priori* relationships handled by the thesaurus.

This international standard is especially concerned with those *a priori* relationships which can be displayed in a thesaurus; where they then, in effect, add a second dimension to an indexing language, as shown above."



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Information Management Delivers A Breath of Fresh Air to ResMed

CompuTechnics' Objective assists Resmed to speed time to market



ResMed, one of Australia's largest manufacturers and exporters of medical respiratory devices, is using the Australian owned CompuTechnics' Objective Enterprise Document Management System to cut costs, improve processes, eliminate massive loads of paperwork and reduce the time for product development.

"Objective eases the process of meeting the requirements of international pharmaceutical and medical regulatory bodies such as the US Food & Drug Administration, and Australia's ISO 9000 quality controls," said ResMed executive Matthew Lipscombe, who, with Mario Boutet, initiated and project managed the implementation of Objective.

"Tracking documents through their entire life cycle and sharing information throughout the organisation is of great assistance to us as Project Managers for the introduction of new respiratory products.

"Previously we were using a paper based quality system which consisted of around 15 thousands documents requiring the photocopying of thousands of pieces of paper to make six sets of those documents available to about 200 employees at our Sydney office," said Mr Lipscombe.

Rapid expansion

ResMed manufactures medical devices for the treatment and diagnosis of Obstructive Sleep Apnoea, a condition suffered by about 10 percent of the male population. All ResMed products are developed and manufactured in

Australia with 90 percent for export around the world.

At the moment, the company has 300 staff worldwide and exports to 40 countries. Business is expanding rapidly, from a current \$60 million annual turnover to a projected \$100 million by the turn of the century.

The Objective Enterprise Document Management System contains information covering the entire scope of ResMed's business, including work instructions, procedures, bills of materials, schematics, printed circuit boards, user instruction manuals, packaging details, label artwork, software and marketing material.

"ResMed has amassed one of the most comprehensive document sets imaginable," said Mario Boutet.

"Previously the technology has not been available to allow the integration of all the information required by regulatory bodies to remain in compliance. Objective is compatible with all the authoring platforms so that everything talks to each other."

Objective's document repository went live in March after a six-month product evaluation.

"The excellent support provided by CompuTechnics in Australia was a major factor in our choice of Objective," said Mr Lipscombe.

"The system is compatible with the wide range of software we use in our design and manufacturing process and it

works on Windows NT, which meant our hardware was ready to go. Over the next few months, we will implement workflow and electronic signatures for approval for our documents and possibly use a Web browser interface. It's simple to use and simple to implement and the price was right."

Objective also delivered a number of strategic benefits. "The scalability of the system is very important as we plan to make it available via frame relay or an Internet Web browser to our transnational subsidiaries in Germany, the UK and France as well as to head office in the US," said Mr Boutet.

The document management system combined with Objective's workflow module will ensure repeatability and highlights bottlenecks. "It will allow us to quickly see where things might be going wrong and allows us to look more closely at the flow of information," said Mr Lipscombe.

"Development of new products in a company that's highly regulated becomes a series of documentary milestones. In all quality systems implementations, the key is process control, whether you are building something on a production floor, developing a new factory, or buying a new part." Objective's workflow will allow us to define your processes and make them self-monitoring.

"In the paper-based system, training was an issue. Staff had to understand the sometimes complex rules of the quality manual to maintain the integrity of the document change process. In the workflow system, you plan it

once, everyone can agree to it, and then it takes care of itself. People don't have to remember the irritating detail."

ResMed has several processes that traverse interdepartmental boundaries. Previously, processes that worked well in one department would break down when they crossed into other departments. "Using automated workflow, these boundaries are irrelevant," said Mr Boutet.

Another strategic benefit is dynamic response to change. "When you have a paper-based system and you want to make a change, the change is documented and goes around to be approved by everyone," said Mr Lipscombe. "It is a very slow and tedious process and tends to create a culture where change is resisted."

"Objective will facilitate the processes of making changes so that the company is able to quickly benefit from people's ideas. In fact, it means action has to be taken to stop change, so that as a company we will be in constant readiness to accept change – and change is vital to survival in the manufacturing industry.

"Also, when you made a change in the paper system, it was quite a task to make sure that all the documents that might be affected were identified. For example, you can direct the system to search for all documents referring to a certain task."

As a medical manufacturer, ResMed is required to comply with the regulatory requirements in all countries to which its goods are transported. This includes the US Food and Drug Administration, Europe's Ce Mark, ISO 9001, Canadian Standard Authority and Japanese Code of GMP.

"We are constantly under scrutiny," said Mr Boutet. "Every so often we will be visited by auditors who will request a variety of documents. The auditors will

now be able to call up any document they want within seconds, instead of having managers physically tracking documents down.

"Should an auditing authority call with a request, we can come up with the answer almost immediately, which is good from every point of view, including public relations. From a regulatory perspective, it means that we can be assured of documenting the entire progress of our product development."



When ResMed has a new device for sale, for example, in the US, a regulatory submission has to be made to the FDA. One recent submission contained 2000 pages, including product description, intended use, testing protocols, copies of manuals, etc. "Generating and controlling the evolution of documents electronically is both many weeks faster and less prone to error," said Mr Boutet.

"Errors in these submissions can delay the FDA approval process which usually takes more than three months, hence delaying our new product time to market.

"Everybody within our internal network now has access to the same information which helps them make an informed decision. As the company grows, the need to add staff to maintain the system is eliminated. The cost of expansion is only the Client Software cost which is very small compared to the cost of generating and maintaining additional sets of paper documents."

About 20% of ResMed's staff is directly involved in manufacturing products. The bulk of ResMed's personnel is involved in research, engineering and product development, effectively knowledge workers.

"Previously, we did not have a structured way to save and build on the intellectual capital of our knowledge workers," said Mr Lipscombe. "The new system means we don't have to keep reinventing the wheel. We can take information from the past and harness it for the future."

Objective at ResMed runs on a 200 MHZ Pentium Pro server with 4 gig RAID Disc Array for storage and HP SureStore for backup daily on-site and weekly off site.

The server runs SQL Server and clients run on a Windows NT network with Windows 95 or 3.11 operating system. Manuals are created using PageMaker 6.5. PCBs are designed using Protel for Windows. Mechanical engineering drawings use CADKey for Windows and solid models are designed using SOLIDWorks. Decals and labelling are created using CorelDraw and bills of material are created using an MRP2 integration product by Sydney company Prometheus. The Microsoft Office suite is used for general applications. "Objective provides a simple interface for documents no matter where they come from," said Mr Boutet.

The next step is to connect overseas offices – We will install Objective servers around the world as the need arises.



The Computechics Team.

"By having the right information at our fingertips," said Mr Lipscombe, "we can buy the components we need at the right time to build it right and test it right first time."

CompuTechnics

Founded in 1987, CompuTechnics is a leading software development and systems integration company specialising in information management, workflow and imaging solutions. CompuTechnics is based in Sydney, Australia with offices in Melbourne and Canberra.

CompuTechnics Objective customers include Transfield, BHP Information Technology, Royal Australian Navy, Public Transport Corporation of Victoria, Aboriginal and Torres Strait Islanders Commission, Honeywell Ltd, P&O Ports and Clyde Engineering.

With over 20% of staff focused on R&D and product improvement, CompuTechnics continuously improves its information management solutions,

maintaining its position as a world class information management solution.

CompuTechnics' flagship product is Objective. Built from the ground up in Australia, Objective provides one solution to the three challenges of information management; electronic document management, physical records and workflow.

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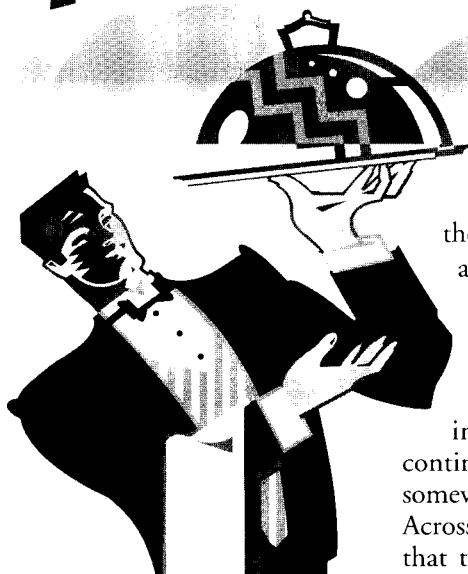
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Special Interest Breakfasts at 14th National Convention



their right and mention particular achievements or concerns of that person in relation to their work.

Questionnaires were distributed to attendees to elicit their interest in the concept of continued networking, possibly of a somewhat more formalised nature. Across all groups, over 90% indicated that they would like further contact with their industry peers. The most popular methods of networking suggested were periodic State or Regional level meetings and a dedicated column in Informaa Quarterly. These were closely followed by attendance at convention breakfasts such as the one they were participating in or contact through a listserv. Of the people who indicated an interest in more formalised SIG contact, 85% indicated that they would be prepared to assist in the formation and operation of a SIG.

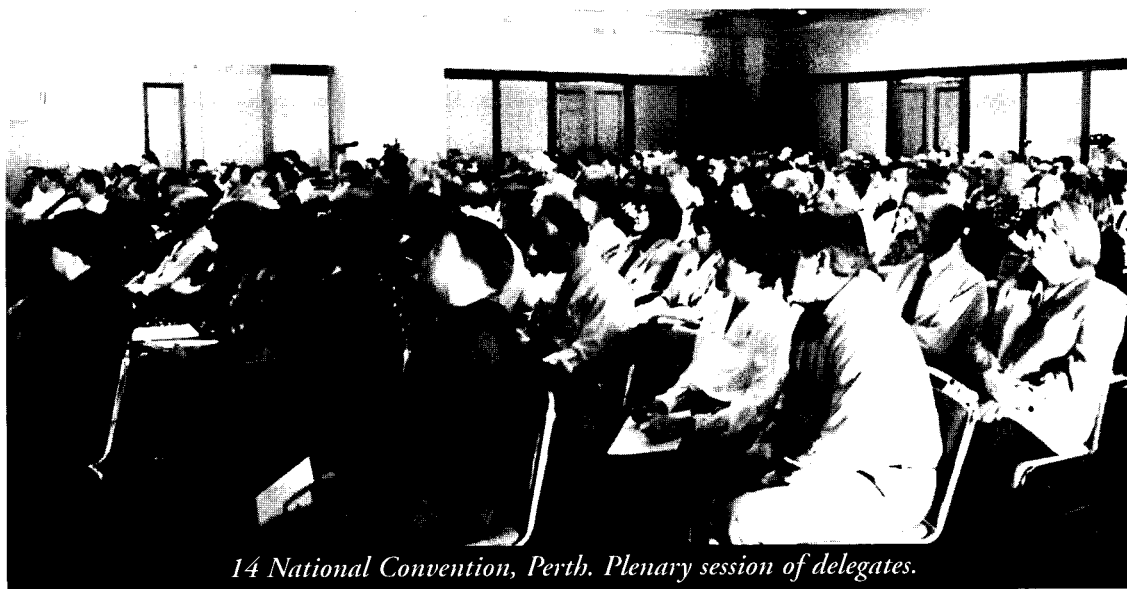
In the coming month, WA Federal Directors will be presented with a listing

of attendees at the breakfasts and attendees will also receive a listing of those people who attended the same SIG breakfast as themselves. In this way attendees can commence some informal networking, should they choose, while the Federal Directors deliberate on the matter.

To my mind, calling for an interested person for each SIG to act as a column sub-editor for a column in Informaa Quarterly may be the best way to get the ball rolling. Given the cross interest which was evidenced at the breakfasts, it may be worthwhile combining Science and Technology and Mining and Petroleum into one SIG for starters.

Marita Keenan, MRMA
(mkeen@upanaway.com)
Covenor SIG breakfasts, 14th
National RMAA Convention,
September 1997.

Over one hundred and fifty people attended the special interest group breakfasts at the recent national convention in Perth. The groups were Science and Technology, Local Government, Mining and Petroleum, Education and Health, and Finance and Law. The structure of the breakfasts varied from group to group with some being briefly addressed by records managers with a high profile in their selected industry, while other breakfast sessions encouraged networking by inviting participants to introduce to the group the person to



14 National Convention, Perth. Plenary session of delegates.

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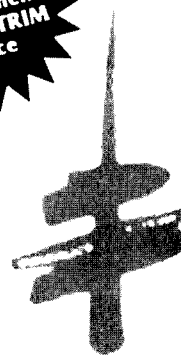
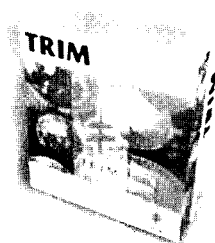
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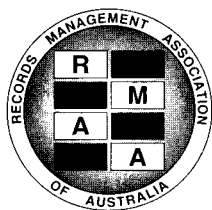
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Preserving Yesterday Managing Today Challenging Tomorrow

The RMAA 14th National Convention

The 14th National Convention of the Records Management Association of Australia was held at the Radisson Observation City Hotel on Scarborough Beach, Western Australia between 14-17 September 1997.

The theme of Preserving Yesterday, Managing Today and Challenging Tomorrow was chosen by the organising committee to reflect the widest possible spectrum of issues with respect to records in our society and to encourage as many delegates as possible to come to Perth. With a final register of just under 500 participants, the efforts of the convention committee (Neil Granland, Vicky Wilson, Norma Easthope and Gail Murphy) and the conference organisers (Congress West) were well and truly rewarded.

The Convention was opened by the Chief Justice of Western Australia, The Hon Justice David Malcom AC, who has been a long time supporter of the RMAA on the West Coast and who has a keen appreciation of the challenges posed by information and communications technology and records and the law.

The first day focussed on "yesterday" and featured the Keynote Speaker Associate Professor Luciana Duranti

from the University of British Columbia, Canada. Professor Duranti outlined the characteristics of recordkeeping since the 16th century and focused on the evolution of the social function of the records keeper, from the guardian of

the records to facilitator and mediator, warrantor and auditor and the last bastion of administrative, legal, political and historical accountability.

The second speaker was Associate Professor Sue McKemish from Monash University who spoke about the records continuum model that was developed by her colleague Frank Upward. She focused on building partnerships between records managers and archivists under

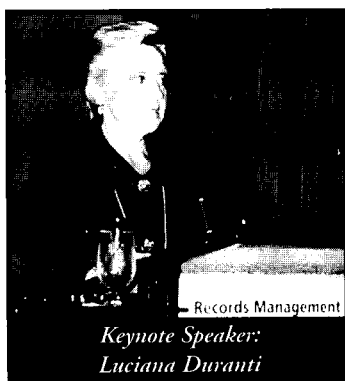
the "records keeping umbrella" and explored in some detail the life cycle concept of records and the continuum model as it has evolved in Australia. It is significant that Professor Duranti later challenged the efficacy of the continuum model.

Later in the day, David Roberts from the Records Management Office in New South Wales detailed the Government wide records keeping regime that is being developed in that state and he focused on some of the more practical aspects in the "real world" of government.

Day two of the convention focused on contemporary



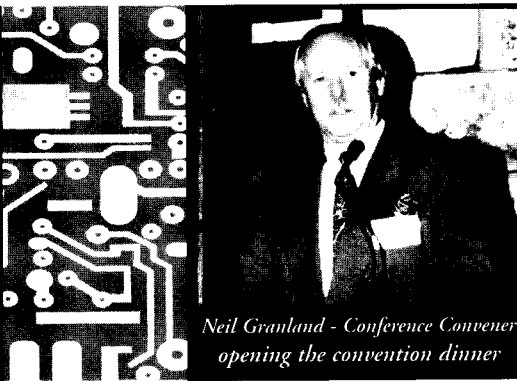
Organising "team" L to R: Shelley Clark, Vicky Wilson, Bonnie Allen, Gail Murphy, Norma Easthope, Katie Clark, Neil Granland.



Keynote Speaker:
Luciana Duranti



Federal President Ray Holswick
opening trade exhibition

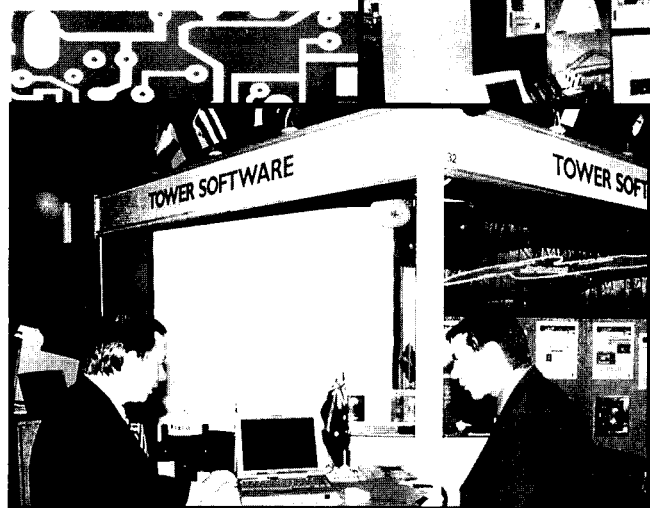


Neil Granland - Conference Convener
opening the convention dinner

issues with the keynote speaker being Jack Gregor, the Chairperson of the Commission on Government. The Commission was held in Western Australia in 1994/1995 to investigate certain key recommendations of the Royal Commission in the commercial activities of the WA Government. Commissioner Gregor noted that there was a need for completely new public records legislation in WA and the report of the commission on government was quite specific in this regard although he noted it was ultimately up to the government of the day to introduce legislation.

Tony and Elaine Eccleston from Canberra spoke about contemporary records keeping theory and its practical application in the workplace especially electronic records. They detailed some of the significant research programs around the world and then discussed the semantics of many of the terms in use by records managers and archivists. In conclusion, Tony and Elaine emphasised the need to prepare a business case for a new approach to records keeping as well as establishing an information plan and carefully managing the implementation process.

Later in the day, delegates broke into smaller groups to attend workshops on either local government, technology or education. The early part of



the final day featured special interest group breakfasts seen for the first time at an RMAA convention.

Their instant success will no doubt see them as a regular feature – (see separate report). The rest of the day focused on the challenges of tomorrow with the keynote speaker being Mike Steemson from the Caldeson Consultancy in New Zealand, and previously from the UK. Mike presented a very invigorating, challenging and even witty address about the records and information manager circa 2020. He explained that the future is here now, and the greatest

challenge for delegates was to either become “information boomers” or stand back and let other professionals pick up the challenge.

Robert Bailey from Singapore, spoke about records management in the ASEAN countries and explained how some of these countries have made a quantum leap from 1930's style drop file dividers through to document image based solutions effectively eliminating the concept of manilla file containers still so popular in the USA and Australia. There remains, however, a huge market for companies and practitioners to expand into these “tiger economies” should they so desire.



The final part of the day featured a lively panel discussion by the keynote speakers who were given the opportunity to very briefly give

some closing remarks about the convention. The audience was then invited to ask questions of the panel or raise any important issues. It was pleasing to see so many delegates taking part in the debate. The final surprise speaker was Professor Sven Rasmussen from the University of Stockholm who ensured that the proceedings concluded on a very light hearted note.

As in previous years, trade involvement in the National Convention formed a critical part in its overall success and this was particularly rewarding for the organising committee, as Perth is one of the most isolated cities in the world with the resultant logistical hurdles that had to be overcome for trade exhibitors. We would like to thank our principal supporter Recall, for being the platinum sponsor as well as supporting the convention dinner and Tower Software for sponsoring an overseas keynote speaker.

Ken Ridley
ARMA

Records Systems Australia records management thesauri

Records Systems Australia Pty Ltd (RSA), the Sydney based independent consulting group, have released the following four records management thesauri:

- Admin Link Thesaurus of *Administration Terms*
- Community Link Thesaurus of *Local Government Terms*
- Academic Link Thesaurus for *Universities*
- Gallery Link Thesaurus for *Art Galleries*

Admin Link comes in three versions. Firstly, the Federal Government version which contains most of the administrative terms used within federal government agencies. The second in the series is the State Government version which is for use by state government agencies. The third version of Admin Link consists of business terms appropriate for commercial organisations, such as Annual Returns, Board Meetings and Memorandum and Articles.

The Community Link Thesaurus of Local Government Terms is appropriate for all local government agencies. The third version of Admin Link consists of business terms appropriate for commercial organisations, such as Annual Returns, Board Meetings and Memorandum and Articles.

The Community Link Thesaurus of Local Government Terms is appropriate for all local government issues including, environmental health, town planning, property, roads, etc. In addition to local government functional terms, Community link consists of a full set of administrative terms, eliminating the need to purchase a separate administrative thesaurus.

The Academic Link Thesaurus for Universities contains most of the terms found in a University administrative system including admissions, degrees and diplomas, courses, alumni, academic planning, personnel, finance and student services.

The Gallery Link Thesaurus for Art Galleries is intended to assist naming the records created by Art Galleries. Gallery Link includes industry specific terms, such as acquisitions, artists, works of art, conservation, exhibitions, etc. Like all industry specific RSA thesauri Gallery Link includes a full set of administrative terms.

RSA will create customised thesauri for any industry. This is simply a matter of sending RSA your corporate information, including a copy of your annual report and corporate brochures and filling out a questionnaire about your industry.

RSA Thesauri will assist you in naming your paper based and electronic documents and files by outlining subject links based on the functions of an organisation. The objective of using a thesaurus is to assist the precise retrieval of specific documents.

Through the subject links, the thesaurus guides the user to the appropriate keyword or descriptor. This prevents the use of synonymous titling, such as PERSONNEL as opposed to STAFF.

Specifications:

All RSA thesauri have the following specifications:

- Format conforms to the international standard for thesaurus construction ISO 2788 Guidelines for the Establishment and Development of Monolingual Thesauri.

- In addition to the hard copy version thesauri are produced on disk ASCII format. This is suitable for loading into a records management software package, containing a thesaurus module which conforms to the international standard.

- Includes a classification manual which outlines the arrangement of keywords in a hierarchal sequence.

- Thesauri are capable of continuous expansion and can be updated by simply adding terms to the subject hierarchy.

Benefits

By using an RSA thesaurus your organisation can gain the following benefits:

- Personnel will not be required to learn new file titling procedures if they move from one part of an organisation to another. Their initial training in records management need not be repeated, as the information naming system will be standardised throughout the organisation.

- The person in control of the thesaurus can be geographically remote from the information. There is no need for information to be stored at a central point. It can be stored anywhere in the organisation as long as information is indexed using terms from the thesaurus and these details are loaded into a manual or electronic database of file or document titles.

- The key terms are entered only once at the time of data entry which reduces the time personnel perform data base entry of file or document titles. This differs from free text entries where more key strokes are

required because each entry must be entered again even if the file or document title is about the same subject.

- The thesaurus can assist with retention and disposal of documents. File titles created using the thesaurus are structured in a hierarchal sequence. This allows all policy matters to be included on the one file for permanent retention as opposed to housekeeping material which would be kept for much shorter periods.

Implementation

To assist managers in establishing and maintaining their thesaurus based system, RSA has created the Records Management Training Handbook. The Handbook includes training sessions on all aspects of records management, including sessions on classification systems, implementation and maintenance of a thesaurus. The Handbook has been constructed to lead managers, in charge of records, through the various steps to establish and maintain best practice within their systems. The Handbook can also be used to train operators and users of the system.

Pricing

RSA thesauri are priced at \$500.00 for a single user version. This allows smaller organisations to purchase a thesaurus at the entry level. Any purchaser of an RSA thesaurus can obtain the Records Management Training Handbook for the special price of \$95.00 (standard price is \$280.00).

Contact

For further information on RSA thesauri contact:

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**EDITH COWAN
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PERTH WESTERN AUSTRALIA

Branch Reports

NT Branch

At the recent Annual General Meeting of the Branch, most of the previous year's Branch Councillors were re-appointed. We also welcomed new Councillor, Merci Betts, and the return of Gloria Corliss to Council. The guest speaker at the AGM was Matthew Story, Solicitor for the NT Stolen Generations Litigation Unit. Thanks go to Matthew for his enlightening description and discussion of the impact on records management of the requirements of Aboriginal people to use records in tracing lost family members. This is a matter which will have a continuing effect on Territorian Records Managers.

At the first Branch Council meeting held following the AGM, the following Branch Executive was appointed for the current year: Greg Coleman, President; Barry Garside, Vice-President; Linda Bell, Secretary; and Pauline Hollier, Treasurer/Registrar. Ray Holswich and Greg Coleman were appointed as the two Federal Directors representing the Territory.

The Branch was very pleased to host two records management seminars in late July and early August which were conducted by Catherine Robinson of the Records

Management Office of NSW. Both seminars were a sell-out, and they were particularly well received. The thirst for training in the Territory continues, and the Branch is hoping to provide more seminars in the near future.

We congratulate Merci Betts who has recently been granted associate membership status. Merci, who recently became the first Territorian graduate from the Edith Cowan University Records Management course, continues the challenge, having recently taken on the much sought after job of minute secretary for the Branch Council!

At the time of writing, some members of the Branch have just returned from a great convention in Perth, and we're all enthused with ideas for the big event which is due to be held in Darwin in 1999.

Greg Coleman ARMA
Branch President

VIC Branch

The Victorian Public Record Office (PRO) through the Public Records Advisory Council, have implemented a Records Management Awards Program which will give formal recognition and encouragement of good records management practices within organisations that fall under the provisions of the Victorian Public Records Act 1973. The Victorian Branch is delighted to announce that we are the sole sponsors of the awards which will be an annual event.

Whilst yet to be finalised, it is hoped that the first awards will be presented by the Premier and Minister for the Arts, the Hon. Jeff Kennett, at an awards ceremony during late 1997. Should the Premier present the awards personally, it will no doubt draw media attention, provide acknowledgement of the RMAA and aid the Victorian Branch and the PRO in raising awareness of effective record keeping practices.

Our efforts on the Education front are continuing with the Local Government Chapter, announcing another round of training workshops to be held early in the new

year. The workshops will be based on a revised version of the successful Training Manual launched in 1994 and will include a workshop on Electronic Document Management.

Our Education Committee has developed a series of short seminars aimed at topics of interest and at minimal cost to our members. The first half day session on Disaster Planning attracted 35 participants. Sessions will continue to be conducted throughout the remainder of the current financial year.

Our functions Committee have been very busy and as of early September were ready to finalise arrangements for the 1998 State Seminar. Keep your eyes on our local newsletter for details and we look forward to seeing new and familiar faces at this popular and informative event.

John Sim ARMA
Branch President

SA Branch

If you thought records management in South Australia had died a few issues ago you are wrong. We had a very strong contingent of South Australians at the Perth convention who continue to wax lyric about its features. Included were two new Company Directors: Helen Onopko and Jan Fisher. They are supported at home by a very active Branch Council lead by Brigitte Stephen as the new president. I won't name all Council members but direct your attention to the work being done by Deb Ophof, chair of the Education subcommittee. Watch out for her latest seminar program in the local newsletter.

A feature of the Branch program for this year was a series of product demonstrations provided by GMB and Ortex. A special event for me was the Electric Document Management Systems and Records Management Systems half day seminar in June. A range of case studies (including Faulding's pharmaceuticals) highlighted once again the way electronic records are effecting the opportunities for records managers. Yes, those RMAA promotion products were available for sale. Is your coffee served in a nice mug? Have you brought your new badge yet? I wear mine with pride!

By the time you read this I expect that there will be a new chapter of the SA Branch of the Association. A strong contingent of state government employees implementing Recfind as part of the Whole of Government Records Management initiative have petitioned Council to form a

State Government Chapter from the old Recfind Users Group. If the number of the Chapter officer bearers is any indication, this state is set to see another great resurgence in records management.

Congratulations Bernadette Bean on being elected to lead the new group, and best wishes for a successful implementation to you all.



Andrew Wood presented George Smith with "The Order of the Golden File" at a luncheon last August to celebrate his retirement from the Australian Public Service. During 19 years with the Australian Archives in Adelaide, George had a lot of contact with the records management units at Defence Science and Technology Organisation

Salisbury. The order, whose motto is "Crappus Nappus" was made for meritorious contribution to the management of Department of Defence records. Congratulations George.

**George Smith ARMA
SA Branch**

TAS Branch

Well, another National Convention has come and gone and our congratulations to the WA Branch for a job well done. Things such as air conditioning breakdowns and infection of half of the delegates with throat, ear and chest problems, which were beyond the control of the convention organisers, in no way detracted from the convention content which was thought provoking and in some instances downright controversial.

Maggie Exon's paper about the records management thesaurus raised many hackles and I imagine there will be much debate and comment appearing in this publication for some time to come. Unfortunately, I was ill with the aforementioned bug when her paper was presented, and so missed out, but will be reading it with interest in the next few days.

The Branch will be following up last year's two day training course on the basics of records management with another two day session aimed at middle level records managers during October, as well as providing several other sessions on topics of interest during the remainder of 1997.

Marketing remains a priority with the Branch conducting a very successful promotion of RMAA and records management in the form of a booth at a recent careers week display. It certainly served to illustrate the lack of knowledge in the community about this most important occupation and made us more determined than ever to keep on plugging our message to all who will listen.

**Trish Wichmann MRMA
Branch President**

Branch Reports

QLD Branch

The Branch has maintained its effort in providing members with an expanded range of opportunities to participate in records management, providing educational and professional development opportunities.

Local Government Chapter

The inaugural Conference of the Queensland Local Government Chapter was held in June to which 30 representatives of Local Government Records Management attended. The Conference was hosted by The City of Logan and included a range of speakers delivering papers on a range of topics relevant to managing records in the local government environment. The Chapter is busy organising its next major function which is a training and skills enhancement workshop to be held in November.

Monthly Seminar Series

The Branch has continued to conduct its monthly seminar series. Recent topics have included Understanding Electronic Records Management and Writing Procedures. In October a half day workshop was organised on Electronic Records Management for Records Managers which involved a range of speakers and a case study.

New Associates

The Branch was pleased to admit the following new Associate members: Kathy Mogg, Cheryl Princehorne, Sue Thomas, Audrey Miller, Geoff Wells, Leisa Browne.

National Convention Brisbane

1998 Planning is well underway for the next National Convention to be held in Brisbane in September 1998. The official launch took place following the last National Convention in Perth. Delegates are assured of an interesting and stimulating program in the Sunshine State in 1998. A detailed program will be published in Informaa Quarterly.

Philip Taylor

Records Manager

Central Registry Archives and

Records Management Services

The University of Queensland

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Participants at the Local Government Chapter training session

WA Branch

Convention '97

Well, after several years of concerted effort from a very dedicated group of members, the convention has successfully come and gone, and we look forward to seeing you all again in Brisbane in 1998. Special thanks are due to Neil Granland, Vicky Wilson, Gail Murphy, Norma Easthope and Congress West. For the convention report see elsewhere in the Informaa.

Sarah Tyacke

1997 has been a very rich year for practitioners in WA. As well as our own convention, a variety of other information related conferences has seen an influx in professional talent that we have been able to access for the benefit of members. At a breakfast session, Sarah Tyacke, the Keeper of the Public Record, treated ASA and RMAA members to an insight into the state of the profession in the United Kingdom. Sarah's knowledge, enthusiasm and vitality made an 8.30am breakfast last until midday! Quite an achievement for a professional event on a Sunday morning!

Luciana Duranti

Luciana stayed on after the RMAA convention and a number of members were able to attend an information and discussion session on the research just completed at the University of British Columbia. The research involved a very detailed examination of the record using diplomatics and archival science theory and an investigation into the translation of the research into the identification of functional requirements for electronic recordkeeping. This phase of the research took three

years to complete, involved over 150 researchers and cost over half a million Canadian dollars. The Canadian Department of Defence, one of the participants in the research, is now using the outcomes of the research to develop electronic recordkeeping software. See <http://www.5/915.ubc.ca/user/duranti>.

Course Recognition Pilot

Edith Cowan University and Curtin University of Technology have both recently had a site visit from the Course Recognition Panel. Although outcomes are not yet available, both universities felt that the site visit was a very positive experience and the whole process of recognition can only enhance the professional status of records management. The pilot project in WA and ACT will enable the Federal Education Committee to further refine the process before the recognition scheme is extended to other states.

Public Records Legislation

At the time of writing WA is still waiting for the new government records legislation to be tabled in Parliament. As pointed out again by Phillip Pandal at the Convention, most expect the legislation to provide a form of Claytons independence, despite the urgings of the various Commissions, etc, for truly independent public records authority.

Margaret Pember ARMA WA Committee



Ken Ridley (RMAA), Sarah Tyacke (UK PRO) and Bob Sharman (ASA) pictured at the breakfast

Education Report



Courses in Records Management

Usually at this time of year, a grid is published indicating the records and archives courses on offer at universities and TAFE colleges around Australia. Unfortunately, all the information required to produce the grid is not at hand and to avoid publishing incorrect information will not be presented until the February edition of INFORMAA. For those people considering a course in 1998, I have listed below the RMAA State Education Chairs. They will be able to give you some guidance on what is on offer in their States and Territories.

ACT – *Anthony Eccleston* – 062 547 616
 NSW – *Peter Smith* – 02 9428 3236
 South Australia – *Debbie Ophoff* – 015 606 192
 Northern Territory – *Ray Holwich* – 08 8946 6076
 Queensland – *Phillip Taylor* – 07 3365 2284
 Tasmania – *Jill Saunders* – 03 6233 2611
 Victoria – *Betty Powell* – 03 9306 7124
 Western Australia – *Gail Murphy* – 08 9335 2533

The above representatives of RMAA will also be able to provide you, in most cases, with a contact name or number at those universities and colleges in their area that currently provide courses. You may also refer to the November, 1996, edition of this journal for course information, however, please be aware that some courses have altered, new ones have been added and, in some instances, courses may no longer be on offer.

Why Study

There are a number of reasons why people in the records management profession undertake study:

- to improve their chances of promotion
- personal satisfaction
- to gain a greater knowledge of their chosen profession
- to achieve their career path

and so the list could go on.

There is certainly a move towards recognising and demanding qualifications at the work place. A scan of the job advertisements in the press and government journals will reveal that salaries are improving for records managers and that with this rise goes the call for qualifications together with membership of professional associations.

There are the more traditional means of study through

university and TAFE courses. Whilst most courses are offered internally, there are now courses that are offered externally. This means that no matter where you reside or work, you are still able to undertake study. Studying externally means that you must be prepared to discipline yourself to meet deadlines and essential commitments, however, the institutions offering such courses provide assistance and advice.

There is provision in some tertiary courses for the recognition of prior learning. If you have been employed for a number of years, then there may be some units within your planned course which you believe you already have a strong knowledge and background in. In such cases, you should approach the institution and discuss the process required for recognition of prior learning. In some instances, it can be to your advantage to undertake such units to familiarise yourself with current trends, plus to air your workplace knowledge at tutorials and through any assignment work.

When considering a course through a university or TAFE, you should bear in mind that they are offered at various levels, for example:

- Certificate
- Associate Diploma
- Diploma
- Bachelor degrees with specialisations
- Graduate Certificates
- Graduate Diplomas
- Degree with Honours
- Degree with Masters

Obviously there are specific requirements to enter any of these courses and these should be discussed with the specific university. Entry conditions do vary from university to university and course to course, however, in many instances past work experience will put you in good stead. This is particularly important for those who did not matriculate.

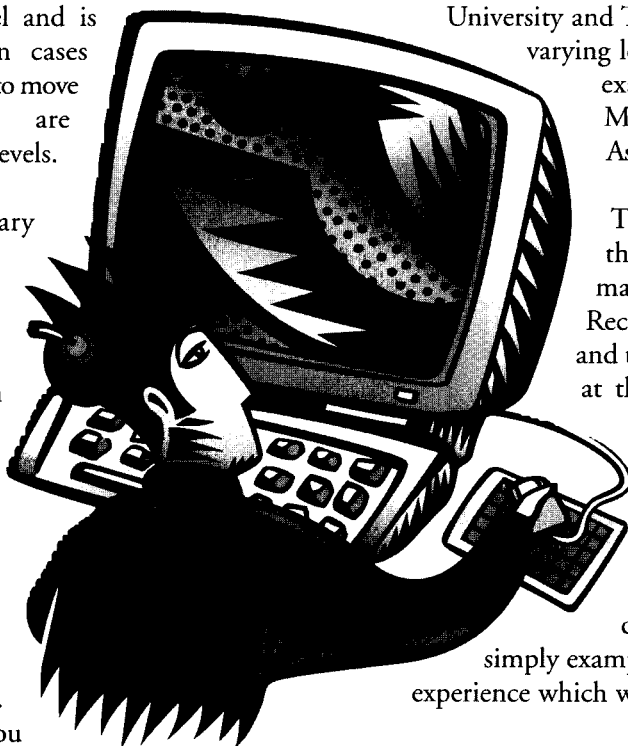
If you have undertaken a TAFE course in records management and now wish to move on to further study through a university, then you should also check to see if there are any articulation procedures in place.

The professional associations in each State and Territory offer short training programs and these are advertised through their respective journals. In some instances these short courses can provide credit towards professional qualifications. The RMAA does not undertake such accreditation at present but the issue has been raised through the Federal Education Committee at its Perth meeting in September of this year.

Central to the concept of employee development, is on-the-job experience. Most people have been through this in some shape or form. In many organisations this can be formalised through the provision of:

- Coaching – where the instructor provides one on one instruction. Question and answer examples can be set through the instructor who will usually act as a counsel as well. Provided in association with job rotation, this system can prove to be extremely useful, particularly to new recruits.
- Mentoring involves the creation of a learning relationship where a mentor (usually a more senior officer) acts as a coach and role model. This system can work at any level and is particularly advantageous in cases where people have commenced to move through the ranks and are approaching the more senior levels.
- Secondments – temporary assignments within the organisation or within an outside organisation which provide participating employees with the opportunity to gain specific skills and perhaps alternative viewpoints. Secondments are popular within government.
- Job rotation – employees gain work experience in various areas of the organisation or business unit. If you accept a job rotation you must ensure that you are gaining new knowledge and experience and not merely working to fill a gap in staffing caused through resignation or illness. You must ensure that your supervisor is interested in your training and development through this method.

I have no doubt that the release of the Competency Standards will have considerable bearing on existing courses and course content. There will be changes within the content and format of more formal courses to recognise the complexities and levels of the competencies. They will also provide a focus for those providing short courses and in house training.



Course Recognition

The pilot program for the Course Recognition process is almost complete. On completion the material used for the program will be revised and the Association will commence to market the process to institutions. We have had some very positive feedback on the process to date together with some negative comments which have been taken on board. These comments will assist in the refinement process.

One of the main reasons behind the Course Recognition process is the ability of the graduates from the various courses to be granted professional status within the Records Management Association. This has some inherent problems as there are courses at both the University and TAFE levels. In addition, there are varying levels within those institutions, for example, Honours Degrees and Masters Degrees, Certificate and Associate Diploma.

There are a number of things that the RMAA needs to consider as a matter of urgency as the Course Recognition process moves forward and these were identified and discussed at the Federal Education meeting in Perth this year. For example:

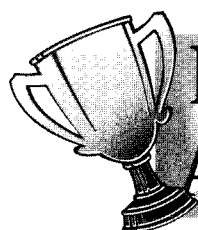
- New tiers of status may be required, for example, those with a Certificate may enter at Associate Level 1, those with a degree, Associate Level 2 (these are simply examples). All levels could be subject to experience which would be on a sliding scale.

Para professional and professional levels could be considered.

- It may well be that a study of what other professional bodies are doing in this area is required to determine what procedures they have adopted. For example, the ASA, AIIM, AIIA, CPA etc.

This is an important issue and one that will require urgent action.

Dennis Wheeler
19 October 1997



David Roberts receives ARMA Literary Award



David Roberts, Manager, of the Records Management Office, a branch of the Archives Authority of New South Wales, has been honoured by the Association of Records Managers and Administrators

(ARMA). David was presented with the Britt Literary Award at the ARMA International Conference in Chicago in October for his co-authored article "From Australia: The World's First National Standard for Records Management". The article appeared in the Records Management Quarterly, Vol. 30 No. 4, October 1996. The RMQ article was praised by the ARMA Awards Committee as "timely, concise and informative."

Catherine Robinson
Acting Manager
Records Management Office

Policy Statement - Electronic Records Management

The RMAA supports compliance with the standards and codes of best practice and guidelines for the management of records as they appear in the Australian Standard AS4390 Records Management. Furthermore it is recommended that any policies and practices for the effective management of electronic records (inclusive of guidelines issued by archival institutions such as Australian Archives and the Archives Authority of NSW) should take into consideration relevant legislation which may impact on the control and maintenance of electronic information which is generated and managed by businesses and agencies.

New Chair of New Technology and Standards Committee Appointed

Andrew Freeman has been appointed Chair of the RMAA New Technology and Standards (NTS) Committee. Andrew is a senior officer working in the Australian Public Service. His qualifications are in accounting, economics, education, and information technology. He is a Fellow of the Australian Computer Society (FACS), and Director of the Community Affairs Board of the ACS. Andrew has published extensively on issues relating to education innovation, long range planning (futures research), and technological change. More details

on him are included at his home page at: <http://www.pcug.org.au/~afreeman>

Andrew hopes to focus on new technology issues, and in particular computing issues. He hopes to strengthen linkages with related organisations such as the ACS. Andrew also hopes to promote to RMAA members developments in relation to new technology.

Andrew is interested in networking with other RMAA members in relation to the work of the NTS

Committee over the next couple of years. He can be contacted via e-mail (his preferred way of communicating) afreeman@pcug.org.au or Ph: (02) 6258 7411.

Regards

Andrew R. Freeman

E-mail: afreeman@pcug.org.au

Chair, RMAA New Technology and Standards Committee (1998/99)

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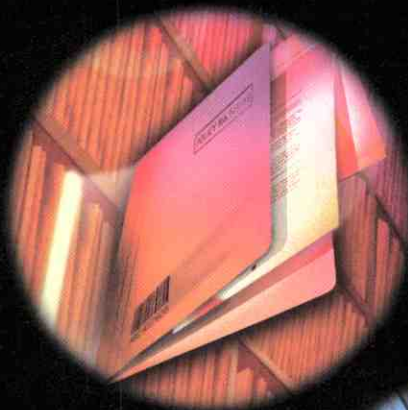


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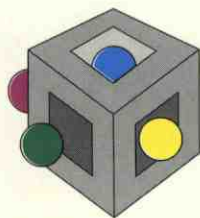
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