

# INFORMAA

## QUARTERLY

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# INFORMAA

## QUARTERLY

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# Federal President's Message



Some of our key achievements have resulted in the:

- Publication of a National Standard for Records Management
- Formulation and adoption and implementation of a national Marketing Plan
- Development of revised Membership Status Guidelines
- Revision of the Association's Business Plan
- Initiation of a project to develop National Records Competency Standards


records and document management, legislative initiatives, and standards and guidelines for the proper management of records. The Association has not ignored the way in which workplace changes are impacting on the profession. In looking forward to the next twelve months, it is important to realise that the Association can only ever be as good as commitment of our members and of your elected representatives, whether it be at the State or at the Federal level. Moreover, the personal contributions of all members is strongly encouraged for it is with your support that the Association can continue to strive to meet its goals and objectives. The challenge is for us to seek to identify issues of relevance to the profession and to ensure that all members make a commitment to the pursuit of excellence.

I look forward to seeing as many of you as possible at our National Convention in September 1996 and on behalf of all Federal Directors, I would like to thank you for your support and contributions since September 1995.

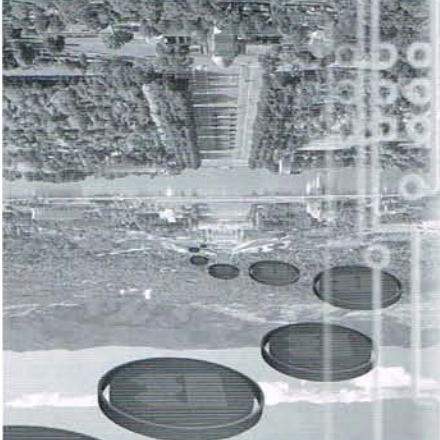
**Denis Comber, ARMA  
Federal President**

Since this time last year, the Association has continued to see major changes within the Industry and in keeping with our proactive outlook we have maintained our direct involvement with Industry groups, Federal and State agencies and with other key agents involved in the management of records and related information resources. As ever, it is our intention to ensure that members are fully aware of the issues impacting on our profession especially in areas which relate to the use of new technology and systems on

The Association has now entered its last phase for the year 1995/96. These past months have proven to be an exceptionally busy time for Federal Council and our record of achievement has been very high. The time must come to set the agenda for the coming year and to look forward to discussing the business affairs of the Association at our meeting this coming September. Uppermost in the minds of the current Federal Directors is to formally close those events which many of us have worked on throughout the year and to look forward to opening new chapters which will enable the Association to maintain its high professional standing within the private and public sector.



**Records Management Association of Australia**  
**1996 National Convention - "Re-Engineering the Electronic Records Future"**  
**8-11 September 1996**  
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# Editorial



**T**here is no doubt that records impact on almost every facet of our lives. The Australian Financial Review recently published an article on the ubiquitous capital gains tax, introduced in 1985 to tax the profits from asset sales. Many Australians, it seems, fail to keep even the most rudimentary records of their own financial transactions

and the Australian Taxation Office has re-printed a booklet entitled "Capital Gains Tax - What You Need to Know". The onus falls on the individual taxpayer to maintain detailed records of transactions (real estate, share trading, stamps and antiques etc) and records may need to be kept indefinitely, or at least until 5 years after the sale of the asset. Obviously, a person who maintains meticulous records will have few problems, but on the other hand, it could prove to be expensive to have a detailed report of retrospective transactions prepared by an expert. The Australian Taxation Office can, of course, also fine you up to \$3000 for inaccurate records!

I am sure that the Internet will continue to impact on records managers for the foreseeable future and in this issue we are pleased to reprint a timely internet article from the UK Records Management Journal. Peter McDonald (one of

our few long term contributors) has written a thought provoking article on less paper and faster service - something to which we all aspire.

As you read this edition, most branch council elections will have been completed and a new group of practitioners will have met to plan for the challenging year ahead. The commitment of these people to holding seminars, conventions and identifying new issues as well as the administrative and financial operations of the RMAA often go unnoticed. I encourage all members of the Association to consider an upgrade to their professional status and volunteer to help this small but dedicated group of councillors. The Associations is only as good as the commitment of its professional members and there is no shortage of issues for us to address.

**Ken Ridley**  
National Coordinator  
Informaa Quarterly

## Letters To The Editor

### Dear Editor

**I** am deeply concerned about the trend amongst various levels of government towards adopting one records management package for the whole of government. I am even more concerned that this trend has received no discussion in the records management journals and newsletters.

The adoption of one package for a total government solution, whether it be state or federal government, poses many dilemmas. Are governments now saying that it doesn't matter what the problems are in the management of records? Are the powers that be

deciding that software X is the solution to all your problems? What happened to the investigation and analysis of the existing systems, and the determination of the best fit solution? Surely as professionals, records managers and records management consultants should be opting for the software that best suits a particular environment? By forcing agencies to adopt one software central agencies are ignoring the diversity of government agencies.

And of course what happens when the biggest client in the records management sphere adopts one software package? What affect will this have on competition? What

impact will this have on future systems development? Will the suppliers need to advertise or sponsor records management conferences and seminars if they have the marketplace tied up?

And my second issue, why aren't records managers discussing this in the forums available? Too scared of the software suppliers? Or just not really sure what to make of it all? I find it hard to believe that I am the only one concerned about this trend.

**Mary Ann Rosenthal**  
Eltham, Victoria



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# The Internet & You

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## Abstract

*The Internet features more and more frequently in the media as the impact of the information society grows and the traffic on the information highway expands. In this article the authors explore the ways in which the Internet is affecting the field of records management. They describe the Internet, the three methods of connecting to the Net and discuss the growth of e-mail with particular reference to its status and retention. The Internet also provides, via list servers, a forum for exchange of information amongst records managers and the most active lists are identified with their addresses given in an Appendix. The authors conclude by arguing that, although, at the present time, the idea of managing or*

*controlling the Net runs counter to the freedom of expression which is its principal characteristic, in time the records manager will take on a greater role in preparing users to use the NET by good record-keeping practices within business as well as encouraging fellow professionals to tap into a valuable resource for their own professional development.*

## Introduction

"We are truly in an information society," begins the first edition of Brendan Kehoe's *Zen and the Art of the Internet*. The Internet allows access "to a 'virtual' library of millions of volumes and thousands of papers (which) affords them the ability to incorporate a body of knowledge heretofore unthinkable... The possibilities are endless."<sup>1</sup>

For records managers, wherever they may be placed within an organisation, the Internet presents an inviting opportunity to promote the good management of electronic records, particularly electronic mail (e-mail), through awareness of the legal and ethical issues surrounding open communication across many networks. The Internet (or Net as it is commonly known) provides an invaluable medium for the exchange of professional information (including jobs) and can add significant value to an organisations business goals (and of records management within the organisation) through the exchange and public dissemination of information.

There are many publications available including *Zen* (now in its 3rd edition) that will help any records manager or archivist who is unfamiliar with the technical and operational aspects of using the Internet.<sup>2</sup> The Net itself is perhaps the best source of information for the latest technical

and resource developments available to users. We have drawn extensively on publications that have been freely available on the Net, including *Roadmap*<sup>3</sup>, *What is the Internet?*<sup>4</sup>, Intel's *Internet Guidelines*<sup>5</sup>, and *Listserv User Guide* from the EARN Organisation<sup>6</sup>, to highlight issues of concern to records managers.

## What is the Internet?

What has now become commonly known as the Internet began more than 20 years ago as a US Defence Department initiative to link its various radio and satellite networks. The research initiative was prompted by the desire to build networks that could withstand significant disruption such as bomb attacks. The philosophy behind the development assumed that any portion of the network could disappear at any time but that every computer on the network could talk to every other computer using Internet Protocols (IP). The same basic premises apply today. Internet sites appear and disappear with great rapidity and TCP/IP has become an established protocol for information exchange. The Internet can today be thought of as network of networks, a set of common protocols, a physical collection of routes and circuits, or a set of shared resources. The Internet is best understood through use.

The Internet is now a global resource connecting millions of users. Universities have joined government agencies in its research and development. In Britain, the Joint Academic NETwork (JANET) now provides Internet connections to over 200 academic sites. The Internet has developed through the financial investment of those organisations who participate in the network.



in documents by using hypertext. Access to the Web can be through graphical browsers such as MOSAIC or NETSCAPE, which allow access to text, pictures and sound; or LYNX which provides text only access to WWW pages. Multimedia viewing can produce attractive results but is demanding of system resources. Many users prefer a faster speed of data transfer and turn off the graphical capability of their Web browser. An early example of a multimedia service to end users was provided in 1993 by the British Columbia Archives and Records Management Service. It instituted an Electronic Access Project, which provided both Gopher and WWW access to selected still and video images from the Painting, Drawing, Print and Moving Image collections. In addition, access to a database developed by the Faculty of Fine Arts, University of Victoria provides rapid full-text retrieval of information from a database containing over 100,000 textual descriptions of historical artifacts.

## E-mail

E-mail has now become an accepted part of information exchange and business practices in many organisations. For records managers who have assumed or share responsibility for e-mail policies within an organisation, the use of e-mail on the Internet presents new challenges and ways of looking at their own role as information professionals. Records managers must learn to work with fellow information professionals in the technical sphere and develop a broad perspective on how the technology as well as the information can be managed. If it falls upon records managers to encourage good records-keeping practices, the security, legal and ethical issues surrounding the Internet should be incorporated into training programs as part of standard records management procedures.

to the host and not your computer. Direct Internet Access allows direct connection to the Internet through high-speed telephone lines, 24 hours a day. With high speed modems and Point to Point (PPP) or Serial Line Internet Protocol (SLIP) connections On-Demand Direct Connectivity can limit costs for individual users using commercial providers who pay for every message. A recent article in *Internet* magazine listed almost 40 UK based commercial Internet providers, and offered advice on how to choose the most suitable service at the most economic rate.<sup>8</sup>

Once users have connected to the Net there are various ways to access and download the vast amount of

information available. Most commonly e-mail is used to exchange information and messages through Listservs and Bulletin Boards. With Telnet commands remote computers can be accessed through a local host. File Transfer Protocol (FTP) commands will allow access to remote computers and the ability to download files from that computer. FTP commands can also be sent through e-mail to download files. A quicker way to search connected menus across many networks is through a package called Gopher. Gopher also searches information and downloads files to your computer screen. Access to Gopher can also be achieved through Telnet connections and e-mail. A search tool called Veronica can search across over 5,500 Gopher servers for keywords and retrieve files, making vast searches for information both quick and effective. Archie is another, simpler, search tool which can search FTP sites linked through a collection of servers. Much of the information likely to be of interest to records managers can be accessed through these text only retrieval tools.

It is the World Wide Web (WWW), however, that has attracted the greatest excitement amongst Internet users through the ability to link keywords

According to *Big Dummies Guide to the Internet* "the Net in its present form would have never been evolved without the (efforts of) hundreds of un-paid volunteers" who spent hours threading the webs of the Net together with software, hardware and documentation.<sup>7</sup> Until now the cost of development and use of the Internet has been largely borne by participating organisations. The Net now seems poised to enter another era, one of commercial use. Thirty-five per cent of network domains are now commercial. It is known that some businesses are considering the use of Open Standards graphical browsers for internal document delivery and Bulletin Boards.

Internet providers using new and cheaper technology have made access to the Internet easily available in one's own home. As the volume, range and quality of information on the Net grows exponentially, the future opportunities for education and advertising appear indeed endless. Increasingly, it is corporate strategy to be linked to the Internet, not the preserve of a few isolated enthusiasts in the computer department. This is as true in the public as the private sector. Many are using the Net to communicate their business objectives actively (for example, many companies including Microsoft, Pizza Hut, and Eli Lilly have World Wide Web home pages), as well as to exchange information.

## Access

There are three methods of connecting to the Net which each determine how the Net can be accessed and used. At the simplest level, access can be achieved from a network that is not really on the Internet through a gateway which allows two networks to talk to one another. This is commonly done through e-mail. Remote modem access is through a dial-up terminal connection. Your computer will act as a terminal on a mainframe and will run the programs available on the host. Downloading files from the Net will download them



The advantages and disadvantages of using e-mail for business purposes can be readily summarised. The Internet can be used to send e-mail to colleagues in another company or institution. It is of particular value where fellow professionals are working in different time zones and the telephone is not always a convenient method of communication. An entire message can be composed before transmission, and only the time of transmission incurring an external cost.

E-mail's strength lies in transmitting factual information where a phone call may disrupt a meeting or colleague's thought processes, or where you cannot see if an office door is open or closed. In some companies reading internal and external e-mail has become the first task of the morning. When an employee comes into the workplace, he or she no longer opens the paper mail first but will turn on the computer and read what messages have been left overnight or since the last viewing.

E-mail has technical limitations. Many mailers are limited to a maximum file size of 300k for transmitting images or large volumes of data. The links used to send e-mail can also be used to mail word processor documents, though as they are likely to be the products of proprietary software and more complex in structure, this may prove difficult in practice. Several standard protocols are often used, such as Postscript or SGML, for the exchange of more complex documents. Many of the technical aspects of managing an e-mail system will be incorporated into technical procedures such as Computer Security Policies, Disaster Recovery Policies, or Data Integrity Policies. These will be developed by technical colleagues without whom the physical management of electronic systems would be impossible. It is now imperative that records managers co-operate with fellow information professionals to fully manage e-mail systems.

E-mail can also be too user friendly! Some companies that used e-mail have made a definite decision to discontinue its use. This is because messages degenerated into social trivia. A formal report or even a meeting may sometimes be more appropriate than an e-mail message. Without facial expression and body language, it is less easy to impart nuances or subtleties in a message. There have been some problems with international users of e-mail in that what is clearly and obviously a joke when read in one culture, does not always translate so happily when read in another. This has led to the growth of an informal international etiquette for e-mail, described appropriately as 'netiquette'. (see *Zen and the Art of the Internet*).<sup>2</sup> Netiquette may be viewed as a guide to grammar and layout where no physical templates are present to guide users.

In 1993, Intel made its Acceptable Use Policy (AUP) available on the Net.<sup>5</sup> This policy includes acceptable behaviours recommended for sending Internet mail, participating in Internet mailing lists, FTP and Telnet. The consequences of poor netiquette are controversial comment which evolve into 'flame wars' or heated emotional arguments conducted over the Net. A large discussion ensued (>10,000 lines long - 400Kbytes) on how organisations should use the Net. This debate is still evolving as the Net develops.

The risks of misuse, intentional or otherwise are great. Recent press cases have highlighted how the Net can be used for illegal pornographic and fraudulent activities. Although many mail messages conclude with disclaimers, these are insufficient to protect an individual or company from criticism or even legal action. For records managers the issue is not how to control access or use of the Internet but how to encourage responsible use and good record-keeping practice.

E-mail offers distinct business advantages but also new responsibilities to all employees who participate in public discussion on the Internet and who may be seen to be representing official policy decisions.

## Status and retention of E-mail

It is important to recognise the status of e-mail messages. It may be regarded as more important than a telephone call or a hand-written note but lower than a formal memo or report. This gives e-mail a major advantage, informality. However, many companies treat e-mail as paper mail, i.e. any statement made on it has the same force as the written or spoken word. It may have the same qualities of privacy as paper mail, or it can be treated as company property like any other document. It may be necessary for users, particularly in the commercial sector, to obtain management clearance for e-mail to the Net before becoming active participants in discussions, as other participants will be able to clearly identify the source of a statement.

We suggest that records managers/archivists must identify how e-mail is used and regarded in their organisation. In an academic environment where e-mail could well constitute an important source of scholarly correspondence, blanket destruction would not be good retention scheduling, and transfer of selected files to a word processor system may be advisable.

A problem for ownership identification and copyright can occur when messages are forwarded or circulated to others. If the original heading (showing source, date etc.) is removed from the message or if the body of the text is edited (both of which are easily done on most systems) then the original temper or content of the message can be radically or subtly altered. So what may appear as the forwarded message of X is, in fact, the forwarded message of X





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with additions and changes by Y. Likewise, a message from X may be forwarded, without the original heading, by Y to Z. To Z the message will appear as Y's own thoughts and message.

It is crucial that users are aware of the responsibility they carry in sharing information or opinion on the Net. The legal and ethical issues surrounding use of the Net can too easily embroil users and their employers in copyright, libel or confidentiality legal actions. E-mail records are now accepted as records and subject to subpoena in many US States. At the onset of the Iran-Contra investigation US National Security Council employees deleted massive quantities of Federal e-mail records. This destruction was justified on the grounds that e-mail were not records per se. When this claim failed, it was then suggested that they were exempt from Federal jurisdiction as they were presidential records. The PROFS Notes legal case (Armstrong v Executive Office of President) established the Federal Record status of e-mail. The recent Court ruling illustrates how electronic record-keeping issues have entered the legal arena at the highest level. This case, details of which were first posted to the ARCHIVES Listserv in 1992, has its own Listserv.<sup>10</sup>

Many users will not be aware of all the legal implications of downloading and storing files from the Internet. A work stored electronically will attract copyright to the same extent as a work stored in hard-copy. Copying electronically can infringe copyright. If a hard-copy copyright work is stored by OCR or other electronic means, the act of storage will comprise copying. Many archives and records management units are now developing detailed policies for managing e-mail and electronic records. The National Archives and Records Administration in Washington DC, USA has made its policy "Electronic Mail Systems" available on the Internet and advertised its availability through the ARCHIVES List.<sup>10</sup>



## Bulletin Boards

E-mail is commonly regarded as a one to one communication medium.

Bulletin boards provide the opportunity for users to communicate with a wider group. Messages are passed to a central system where anyone with an account on that host can read messages and post messages of their own for others to read.

For many people, these bulletin boards are the most striking development of the Net, with new groups covering almost every conceivable topic. News groups are also known as conferences or forums and by their very nature, these special interest groups can often contain provocative and trivial postings. This can serve to devalue the quality of the information and discussion on the boards. It would certainly be unwise to place important business on open access boards as unwelcome publicity or e-mail replies may result.

## List Servers (Listservs)

Listservs act as a means of distributing electronic mail to users appearing on a mailing list. A message is addressed to a central server, the Listserv, which then copies and distributes the message to everyone subscribed to the mailing list. The server also acts as a central library of files which can also be retrieved using e-mail commands. The mailing lists address specific areas of common interest to network users. Users subscribe to the lists by sending their e-mail address to the Listserv. While the Listserv maintains the mailing list, users can communicate with the other members of the list by addressing their messages to the subject group and not the Listserv address. The lists of interest to records managers are moderated to ensure that netiquette is observed, that the discussion remains relevant to the list and to offer advice on detailed Listserv commands (see Appendix 1).

For those users paying commercial providers for each message sent and

received it is obviously important that the discussion on lists is kept relevant to the subscribed topic. Anyone subscribed to the RECMGMT List might expect up to 12 or more messages each day which can soon prove expensive and time consuming to read. Listserv commands allow users to receive Digests of daily messages which arrive at the users computer as one package, instead of the steady stream of messages that might otherwise arrive. Users might also request an Index of daily messages from the Listserv which simply provides the user with a list of message headings. Users can then request any message that interests them. It must be said, however, that message headings do not always bear great relevance to their subject. As discussions progress headings often lag behind the topic being discussed.

Of particular interest to the records managers are the ARCHIVES List, RECMGMT List and ERECS List which are the main forums for the exchange of information amongst records managers. These Lists are international in character, with contributors participating from Europe, Australia and North America. There is however, a strong US bias with the list being based at US university sites. Often messages are cross-posted across all three Lists but the discussions on all three carry their own character and diversity.

In late 1994 the RECMGMT List claimed almost 500 members. In the course of a year the discussion on this List included practical advice as well as theoretical debate. Discussions ranged on the necessity of confirmation for implementing records disposal, the retention of electronic records, legislative requirements for electronic records, records management software products and records box specifications. Discussions are generated by members of the list posing a question, asking for advice or bravely offering an opinion on some point of dispute. Discussions are often lively and information is shared willingly and openly amongst

List members. The List provides immediate access to the latest developments in records management practice. E-mail policies developed by organisations are often posted or advertised as being available to List members as are the latest legislative developments.

During the course of a three year debate on the Internet, a wide variety of technical and theoretical positions have been voiced by many individuals in the profession on the PROFS case. This debate has been the catalyst for the formulation of many institutions electronic record-keeping policies. The landmark Supreme Court ruling in the PROFS case of the 27th February 1995 was cross-posted to ERECS, RECMGMT and ARCHIVES Listservs the following day.

## Managing the Internet

The management of e-mail generated through the Net is part of a wider responsibility of records managers to share in the management of electronic records from both internal and external sources. Records managers can use the Net for the education and advancement of the profession. Can records managers hope to manage the records available to users on the Net?

To seek to manage or control the Net runs counter to the prevalent philosophy behind the Net. At this stage in its development there remains a spirit of untrammelled expression amongst some of its users who remain opposed to control or censorship of any kind. Listservs and WWW sites can appear and disappear from the Net with great rapidity. Archivists and records managers have merely begun to consider these issues. A small survey of ARCHIVES List subscribers into Gopher management conducted by Arizona State University revealed that most respondents had not established any criteria for what kinds of information should be placed on their Gopher.



# Appendix 1:

## Useful Listserv addresses for records managers

*The authors cannot guarantee the continued existence of the Internet addresses given below.*

- ARCAN-L Archival issues in Canada (arcan-l@vm.ucs.uaberta.ca)
- ARCHIVES Archival theory and practice (archives@miamu.muohio.edu)
- ASIS American Society for Information Science (asis@uvmvm.edu)
- CNI-DIRECTORIES Coalition for Networked Information's (cni-directories@cni.org)
- CNI-COPYRIGHT Coalition for Networked Information's Copyright and Intellectual Property Forum (cni-copyright@cni.org)
- ERES-L Management and preservation of electronic records (eres-l@uacsc2.albany.edu)
- LCSH-AMC Discussion of archival description (lcsch-amc@asuvm.inre.asu.edu)
- NISO-L US National Information Standards Organisation (niso-l@nervm.nerdc.ufl.edu)
- RECMGMT Records Management (recgmt@suvn.syr.edu)
- USMARC Discussion of USMARC formats (usmarc@sun7.loc.gov)
- Source: David Wallace, Listservs: *Archives and Museum Informatics Quarterly*, vol. 8 no. 2, Summer 1994; pp. 116-123. Printed in *Archival Outlook*, January 1995 (Society of American Archivists).

veracity of research works claims before public dissemination. They may even cease to exist in their current form. It also carries document security implications for records managers. If the practice of peer group review breaks down, individuals may feel less inhibited in communicating sensitive and novel information across the Net.<sup>11</sup>

Many organisations are already doing this with great success. Edinburgh District Council has been amongst the first local authorities to advertise its services on the World Wide Web (<http://www.eft.hw.ac.uk/edc/edinburgh.htm>). The US National Archives in Washington DC has made available an Internet Gopher server that provided key information relating to the National Archives including descriptions of facilities, information on holdings, publications and general information leaflets and Federal records regulations (Gopher.nara.gov or <http://www.nara.gov>). Many archives and university projects are also using images of original source documents and making them available on the Internet. Project Gutenberg at the University of Groningen, Netherlands, has placed more than 60 documents on open access on the Net including the Magna Carta, the USA Constitution and the Gertysburg Address (<http://www.let.rug.nl/welling/welcom.htm>).

## Conclusion

The issues surrounding the Internet for records managers are more than just the technical aspects of electronic records management. The nature of the Net suggests that equal thought must be given to how records managers can influence and train users in good record-keeping practices while giving them the freedom to feast on the endless possibilities of the Net. Records managers must also learn how to use the Net for their own professional advancement and use the Net to advance their own and their organisations' business goals.

Typically for the group surveyed, specific information types had been placed on the Gopher, finding aids, archives and records management policies. Interestingly, all respondents replied that an archivist with technical expertise or responsibilities was permitted to load files. All responses indicated that there was a form of local control over their own section of the Gopher for managing and updating information. No responding institution was actively considering loading files with restricted access to certain users. The survey concluded that the responding institutions managed their Gophers through technical staff at a high organisational level with local control over different sections of the Gopher, usually exercised by an individual with the advice of peers. Several research initiatives have been launched to examine how the management of electronic records can be achieved in the world of virtual documents. The University of Pittsburgh has set out to examine this issue in the broad context of electronic records management: how records should be saved, maintained and used. The project aims to provide technical specifications that programmers can use to create metadata - data that surrounds and describes the original data with information on the context of the document and the business transaction to which it relates - as well as maintain its integrity and authenticity. As records managers assume greater technical proficiency it is not unreasonable to suppose that they will assume a greater management role in using the Internet as a medium to disseminate information about their own role in the organisation or the business objectives of the organisation itself. The Internet may also be seen as a method of online high-quality document publishing. Publishing of this nature without peer group review has serious implications for academic journals, as they may lose their traditional roles of checking the



Also of interest may be:

DATAECD- data storage technology  
(dataecd@nml.org)

IEEE-METADATA metadata and  
data management  
(ieee-metadata@illnl.gov)

H-ALBION British and Irish History  
(h-albion@bitnet.uicvm)

## Acknowledgements

The authors wish to thank Dr Tony Parsons (IT Consultant), Mrs Janet Ash & Ms Jean Samuel (INformation Resources), Pfizer Central research for their comments and useful information.

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3. Patrick Crispin. *Roadmap*, University of Alabama, LISTERV@UA1VM.UA.EDU (GET MAP PACKAGE F=MAIL).
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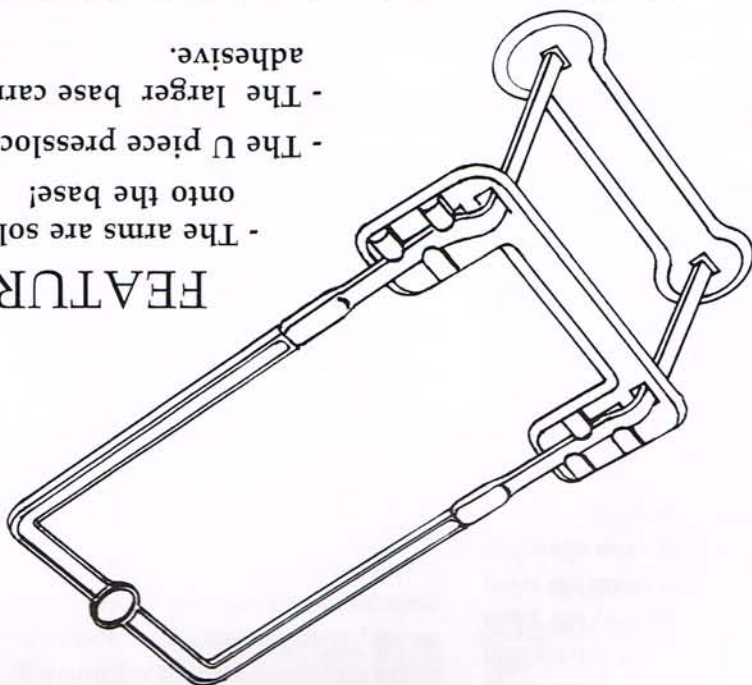
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# Records Management Tomorrow Less Paper - Faster Service



**Peter W. McDonald ED FRMA**

*Peter has been in the records management profession for some 34 years. He is now the only 'Fellow' of the Association working full time.*

*He has written this article to give his views on where the profession is going and to stimulate discussion among members. In the hope that some members of our great profession will avoid being left out as the century changes over.*

## Abstract:

*The records management profession must develop and successfully implement tools that will create less paper and provide faster service. Less Paper - Faster Service should become our banner for the coming years.*



## Is the centralisation records management approach dying?

Commercial competitive organisations and those controlled or owned by government that are establishing their operation on commercial principles are changing to improve the service they provide. Is there a need for records management to change also? If this change is already taking place, is there a move away from the traditional 'life cycle' file management concepts, and in particular, the use of the wholly centralised managed and arduously regulated registry approach? Some say yes and that this change is taking place now. Are records managers failing to provide their organisations with a service level consistent with the high expectations of modern managers and customers? Is this because the method of service is no longer meeting a significant aggregate of the requirements of organisations in today's world of 'best practice'? I believe, changes in records management are not a matter of 'will they occur', but 'when'. Be warned, the change has started and those who do not recognise the movement and join the flow of this transformation will be left behind.

Records managers who do not go with the flow or support the spirit of change, will lose their roles to other line managers, staff improvement committees of the consultation process, or information resource coordinators from the computer science profession.

The traditional, old guard records management practitioners need to start now to change their thinking from 'the centralised records management operations concept' to the new concepts of recordkeeping\*

and document management systems operated by and for the Information Users, the Information Owners and the Information Providers. That is, the records management information system should provide a service to those members of the organisations that service the customers, those who make the product and those who make the decisions. The system should definitely not simply serve the record manager and the central registry staff.

\* I do not use the term 'recordkeeping' as a substitute for the term 'records management'. There is a substantial difference. Australian Standards AS4390 Records Management has some good definitions that you should consider. A colleagues' view of the term 'recordkeeping' and mine is the same, that is:

*Recordkeeping is a much more powerful concept and brings together administrative and business practices with systems to achieve outcomes in the forms of records which are comprehensive, identifiable, complete, accurate, meaningful and authentic. Records Management is about custody and control of the record.*

Recordkeeping is also about combining the source or form documentation and the information contained with other functions including accounting, to provide a total service. An example of a total service is the changes brought about with bank voucher processing. This change involved the introduction of recordkeeping methods to a traditional bulk item processing, which resulted in the reduction of retrieval of vouchers from ten days to less than ten minutes.



Some time ago the expression 'recordkeeping' was considered to be an activity lower than records management, somewhat like bookkeeping was to accounting. As stated above it is starting to be used to cover the full spectrum of activities to cover records management and office procedures and requirement for information.

When I use 'document management' in partnership with 'recordkeeping', I mean the control systems that can capture electronic documents on PCs and organisational networks at an early stage of the record's life, and are able to:

- distinguish between versions;
- store and access information in individual documents;
- store and access information in subject groups without being classified to a vertical file.

The document management side of the system should handle imaging and character stored text as in COOL<sup>3</sup> and COLD<sup>4</sup> software and hardware.

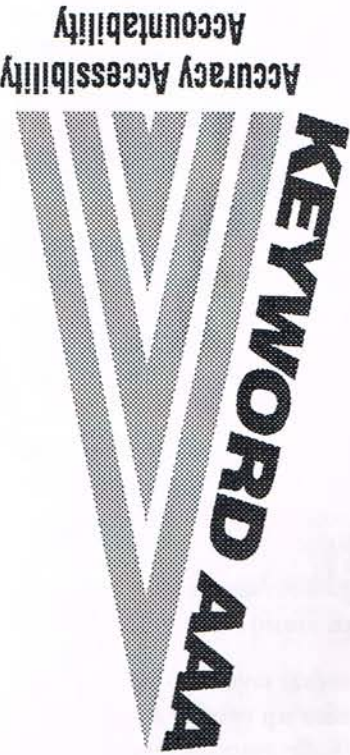
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- The continuation of the total centralisation approach has resulted in many customer service areas, management teams and operational sections creating their own non sanctioned filing systems. These unofficial systems rely heavily on personal memory of the staff that created them for information retrieval. The centralised system has, in their mind, failed them. The result is an unreliable procedural situation for any organisation which can lead to damaging litigation, loss of business and added costs.
- Factors affecting the system failure I have found have been many and varied, but include:
  - failure to allow the records management system to mesh in with other office procedures to form a total information system;
  - failure to update, change with new requirements of the organisations and simplify the classification systems;
- placing too much emphasis rather than on ensuring the users have the required information they need and the right file or correspondence;
- ignoring the statutory requirements of record keeping;
- failing to anticipate the requirements for accurate and complete records to defend the organisation in litigation cases;
- concentrating on 'records management' rather than on the users' requirement for the information contained in the records and also the users' requirements for the management of records;
- continuing to work without the assistance of packaged and simple records management systems for small to medium sized businesses; and, finally,
- the failure of our profession to market our vital / valuable services and skills.





Why has this situation occurred? Perhaps the inadequate records management service with the centrally managed and the strenuously regulated registry approach has contributed to, or was even instrumental in the accountability problems through<sup>5</sup>:

- failure of employees or systems to make records in the first place;
- maintaining records that were inadequate to meet accountability and other organisational requirements, (i.e., records that were not full and accurate);
- failure to capture all records into the central records management system, so that they were not subject to arbitrary destruction or could not be found when required;
- failure to identify and retrieve the authoritative version of a record or document when multiple versions exist;
- failure to maintain records within the time necessary to meet specific accountability requirements; and
- failure to assign responsibility for different aspects of records management coordination at all appropriate levels in the organisation, so that no-one takes responsibility.

A major issue in the future will be managing information more effectively, comprehensively using all tools available and across all levels of the organisation. Organisations have a priority to improve decision-making and to provide decision-makers with the tools to assist them to make the correct business decisions. This can be achieved by moving the decision-making down the line to get this action as close as possible to the customers on the front counter where the money is made!

So-called information management has been mainly the prerogative of those from the computer sciences and accounting professions. Although there has not been cooperation and understanding between records management and these professions, it can be said that the information

technology managers have won the respect of management. This is not to say they have always done a good job; I could list many very expensive flops to their credit. One of our shining strengths, as records managers is our ability to discuss issues in common language at the ground level more effectively than IT<sup>6</sup> people. I believe it is also factorial that those in the computer sciences and accounting profession have higher educational qualifications. This creates an imperative for those in the records management profession to change their traditional methods and improve their level of education so that they will not become irrelevant tomorrow.

We do not, in great numbers, get out there and sell the results and achievement to be made by having improved records management. We concentrate excessively on our centralised safe havens.

All too often the records manager at the central registry is only involved in the last stage in the process rather than an active participant in providing more certainty in the timeliness, completeness and reliability of the information used.

## Less Paper - Faster service

The records management profession must develop and successfully implement tools that will create less paper and provide faster service. Less Paper - Faster Service should become our banner for the coming years.

Although this statement sounds a bit trite and this could be so, I believe that there are too many 'so called records managers' out there who are not keeping pace with developments and trends in our profession.

It cannot be said that record management systems have created the papers, although, in my view these systems have not helped control the growth of paper. Organisations create the paper and pay very little attention to the methods of control or retrieval.

Records managers have not in the main worked on ways to reduce the endless growth.

I recommend that you obtain and read 'The Executive Magazine' from Unisys - Solutions (winter 1996). In this magazine, there are several excellent articles on how some top practitioners have made incredible paper reductions and improvement to service. For example: USA Los Angeles Department of Welfare reduced the number of forms to initiate a case transaction from 110 to 3. The Zurich Canton Police 100 to 10. The Kentucky Department of Child Welfare 40 to 1.

Over the last 10 or more years we have all heard and read of the coming of the Paperless Office. Is it a myth? because it just does not seem to have arrived. With the great advances made in hardware and software and the greater acceptance of electronic transmitted and stored records the paperless office may be nearer.

There are opposing views<sup>7</sup> on this subject; the first predominant view is:

*Many business people claim that they are already reducing paper use by 50 percent or more, as they mandate the delivery of their documents in electronic, viewable form. Soon, they claim, all documents will be electronic.*

the second prevailing view is:

*Others maintain that the paper document is here to stay, with paper consumption continuing to grow as data centre and network printing volumes increase. Indeed, industry analysts predict that over the next decade print volumes will grow annually by 5 percent or more.*

I do not know with any certainty which course records systems will take. However I do believe that we should not count on the role currently undertaken by records managers as custodian of all records and of all paper records being exclusively the responsibility of records managers.



Published research<sup>®</sup> by the Gartner Group (July 1995) tells us that by the year 2000, a great majority of organisations will have suffered some form of 'info-famine' or 'info-gorge'. Info-gorge will occur when the floodgates to information are opened, without evolving the document in a way that reduces the number of document containers. Users and processors will have access to too many containers without good content access - they will 'drown' in information. Info-famine will occur when information access is too restricted by an inadequate document (record) management system, or when the organisation stops trying to access the overwhelming amounts of information and containers available. Users and processors are starved of information.

There is no doubt, in my view, that members of our profession have the skills required to do the job in tomorrow's world! However, the tools required to be developed and



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record. We may still consider this to be an overkill in service provision or an over ambiguous situation. But, more and more of our customers will require an infinite number of ways to access detailed information in seconds using this type of technology.

Greater use will also be made of workflow management tools, including those now coming onto the market in records management software. In reality, current records management software only makes a queued list of records presented via the PC.

The traditional and inherently inefficient internal document and file courier services, correspondence routing and classification decision making, centrally based will, in my view, disappear. What is needed is recordkeeping and document management systems covering all levels of each organisation, rather than just a centralised regulated registry.

implemented must be owned by our customers and be very easy to operate. Tools must be simple, user friendly and follow the KISS<sup>®</sup> principles. That applies not just to the old guard records management section staff. You don't want your customers spending their time trying to figure out how to do something with technology instead of obtaining the information they require. Discussions with my colleagues lead me to conclude that in some organisations, staff in areas that should be serviced from a centralised registry were inclined to deal with a combination of official files and working papers kept in a variety of personal filing systems.

We have been taught that the only way to ensure future retrieval of records was to have tight controls on the terminology used to title and index the documents. However, the introduction of effective OCR<sup>®</sup> and large, inexpensive data storage techniques now allow the indexing of all words used in a



## Recordkeeping and document management

Making and maintaining complete, accurate and reliable evidence of business transactions and decisions is as important as the organisations efforts concerning financial and human resources, and as important as product and service delivery. But records systems are a background function compared with these other business functions. This will not change, in fact it will be even more so tomorrow.

In the office of tomorrow, it is essential that internally created records, external correspondence and other documentation are readily available when required without any time delay. That is, easily accessible in the areas responsible or through a system that gives access to all information on the required subject.

A key to the success of tomorrow's records manager will be providing a coordinated service to establish and maintain core organisational standards. The requirement for a systematic approach to records management within all organisations will still be vital, to protect and preserve the information contained in each area of operation. The regulation of records management practices and procedures will, if managed appropriately, continue to ensure that uniform protection is given to all records. It can ensure that information can be efficiently and effectively retrieved, using standard forms of identification and retrieval procedures.

All this activity needs to be carried out in full partnership with the users, who must become the owners of the records. I have found that what is required is a system that provides simple to use functions for the following:

- file registration, titling and indexing under a controlled thesaurus;
- document receipting, indexing and tracking procedures; and

- electronic / imaging enabling capability for file and document storage and document routing.

I have also found that customers require advice from records managers on:

- language control coordination;
- file and document titling methodology and monitoring; and
- complete subject / topic information compiling.

The introduction of recordkeeping and document management systems that are 'image enabled', can both simplify the procedural steps involved and eliminate entire paper documents. Imaged enabled systems that can also eliminate all file and correspondence movement through an internal courier service are required. Internal courier service is an area of operation that has always dogged even the better of records management systems and service providers because of the time delays for information movement within the office.

What I mean by 'image enable' is for the software chosen to manage the key records management functions of indexing and file or document movement. It must be able to handle the electronic capture, movement and storage of documents. Document storage to be as a picture bitmap or as stored text in COOL or COLD format. An imaging system with add on functions that attempts to, look like a records management system will not perform adequately in tomorrow's office.

The systems and core consistencies of organisational recordkeeping procedural steps must offer improved operating efficiencies, by providing more certainty in the timeliness, completeness and reliability of the information used. The core consistencies are the minimal levels of uniformity and flexibility allowed that are agreed to by users and management with only the advice coming from

records management. Cost savings must and can be made in the reduction of clerical effort required to process documentation and correspondence in all operational areas.

### Recordkeeping Systems for:

- the Information Users
- the Information Owners
- the Information Providers

Recordkeeping in all organisations is a management function, but the day-to-day operation should be with the information users. The introduction of recordkeeping and document management systems that gives the prime responsibility and accountability for information on subjects of relevance to each area of operation to the users in those areas will become the standard.

## Conclusion

Records management is changing. Recordkeeping and Document Management as part of the general information needs and obligations within an organisation's strategic plan is required and will need to be widely implemented. This will be attained in full partnership with customer service and achievement of 'Best Practice'.

Recordkeeping and document management systems will be operated and owned by operational staff other than records management. Records managers will have a role to play tomorrow in the field of development, implementation and monitoring standards. However, records managers must start changing today in order to prepare for tomorrow. For those who do not change, in my view, there will be no tomorrow.

Surviving records managers of tomorrow will no longer just be in the filing business - they will be in the information business. They will be fulfilling the requirement to offer innovative new products and value-added services all to meet the rising



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- References**
- 1 Phillip Taylor MRMA Records Management- The University of Queensland
  - 2 Personal Computer
  - 3 COOL= Computer Output On-line
  - 4 GOLD= Computer Output to Laser Disk
  - 5 Australian Standards #AS 4390 Records Management (with some rewording)
  - 6 Information Technology
  - 7 An article by Mr Phill Chambers General Manager Fuji Xerox Australia, Source/date unknown
  - 8 An article on 'Info-Famine or Info-Gorge', Source/date unknown
  - 9 KISS= Keep It Simple Stupid
  - 10 Optical Character Recognition
- (c) 1996 Peter W. McDonald ED  
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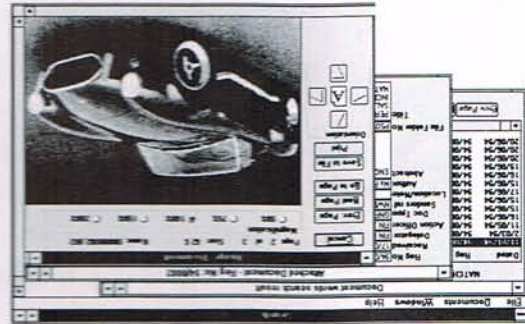
expectations of their customers. Customers will demand a full information service, end-to-end solutions. It will no longer be acceptable to deliver a partial product and expect the customer to go out and find the rest of the data / information / documentation. The service will be a no-assembly-required environment. There is much deliberation in our industry on what lies ahead. We are seeing every day a steady movement away from the traditional 'life cycle' file management concepts with the takeover of our services by the IT area. Or do you believe I have it wrong? I would therefore hope to see in the INFORMAA Quarterly other views of the future. Please put pen to paper.

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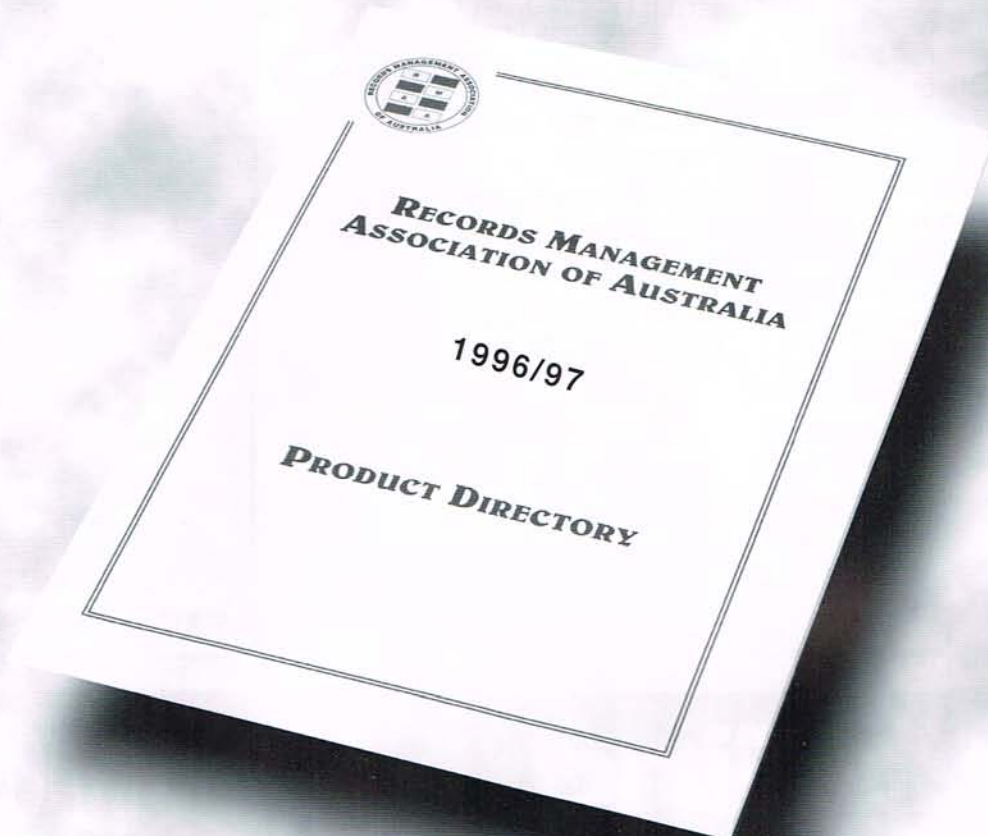
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# National Records Competency Standards

I guess the saying "seeing is believing" would be the proper way to start this particular column off.

Yes! it has finally happened, the National Records Competency Standards project is up and running.

Much to the delight of the Selection

Panel and indeed the National Steering Committee we have been able to appoint a Project Officer who will be responsible for the writing of competency standards for the records and archives industry.

Susan Henry of Susan H Staff Development and Training was appointed on 21 June 1996.

Susan comes to our profession after having recently completed competency standards for gardeners and horticulturalists in Victoria and nationally for the telecommunications industry. One might well ask how do we assimilate that to the records and archives industry?

The National Steering Committee thought long and hard about who would be the best and more appropriately the right person to do the job for us, it was generally agreed that someone from outside our profession would be the better person, as the

influences from within the industry would come at a later date.

The task of the Project Officer will not be an easy one, with the three arms of government as well as the private sector having to be mapped in the very early stages of the project.

Speaking for our own Association nationally, branches have already submitted the names of contact officers to assist Susan with the daunting task she has ahead. The other major stakeholders Australian Council of Archives, Australian Society of Archivists, Health Information Management Association of Australia and Association of Image and Information Management will all nominate representatives in each State and Territory.

Their role will be to assist the project officer in finding out where all the people working in records and archives management are "hiding" as well as those who have a daily records keeping function.

When you think about that for a while it becomes rather daunting, simply because each and everyone of us have a records keeping function of some

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## Consider the Possibilities



sort without being stamped as Records Managers or Archivists. I believe the outcome of the project will be one we can all be very proud of and like the RM Standards, will perhaps be adopted internationally. There is still a great deal of work to do, but I must extend my thanks publicly to the members of the Steering Committee for their patience and dedication to date. Three years has been a long time, but we made it.

Ray Holswich ARMA

Chair National Competency Standards Steering Committee



# RMAA 1996 National Convention

## Re-Engineering - The Electronic Records Future

### Welcome to Canberra

**M**ost organisations have experienced restructuring in many forms in recent years as they have adapted to difficult and changing economic conditions.

Today, managers are being confronted with the need to raise productivity - this can mean changes to job design, organisational structure and culture, and management systems. When this is coupled with the explosive growth in technology options and usage, it presents a genuine challenge to management.

This challenge is reflected in the theme of the 1996 National Convention of the Records Management Association of Australia, "*Re-engineering - The Electronic Records Future*". The three day program will lead Convention delegates through social and economic aspects of re-engineering and the impact that re-engineering and change will have on information management and finally, how technology will influence the workplace of today and tomorrow.

It is intended that the 1996 Records Management Association of Australia Convention will provide an

environment in which managers and decision makers at all levels will have the opportunity to meet, discover and discuss the many aspects of information management.

### An Overview of the Convention Proceedings

The Convention theme is a progressive one. From initiatives in 'streamlining' corporate work processes to the management of information resources, the Convention provides opportunities for managers and knowledge workers at all levels to reflect, review and update their information base in a concentrated environment.

The identification of technological responses to improved records and document management strategies will provide delegates with the most up-to-date views on new developments in managing information and records. How these technologies help achieve accountability in an ever-changing work environment will be an important aspect to be considered.

The first day will concentrate on investigating contemporary development in corporate and administrative practices in the private and public domains, using such tools as Business Process

Re-engineering. The effects of these processes of review and restructuring of organisations on the provision and management of the information resource will be explored.

Management of information itself, and the workflow processes inherent in that management, are the subject of the second day's activities. The concepts addressed will include the identification of the intrinsic intellectual content of records; the medium on which the record is maintained; and the demands placed on communication of the message both internally and externally.

The third day is given, generically, to technology and how the dynamics of the information carriers, the hardware and the software, the storage media, transcribers and translators of information, influence the decision and product of today's and tomorrow's workplace.

We look forward to meeting you in Canberra.



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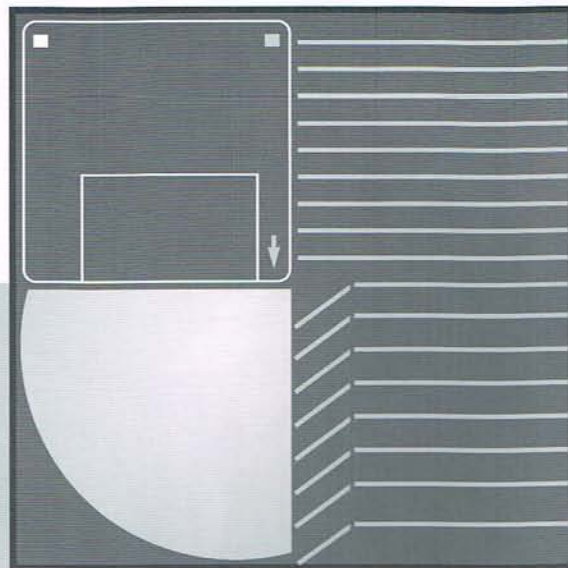
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## John Kerry FileNET Corporation



**F**ileNet Corporation has announced that John Kerry has been appointed to the position of the company's Managing Director for Australia and New Zealand. Mr Kerry joins FileNet at a very dynamic time for the company following its recent acquisitions of three market leaders in imaging and document management, Saros Corp., Greenbar Software and International Financial Systems, the manufacturer of Watermark Software.



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# Branch Reports

## NSW Branch Report

The Branch has now entered its final phase of the operating year and our election of office bearers will take place after the presentation of the Annual Report at our Annual General Meeting which is scheduled for 9th July 1996. The past twelve months has been a busy time for the Branch and it's perhaps time to reflect on past achievements and to look forward to what the coming year brings.

A number of significant changes also occurred at the Federal level and our many Committees were collectively responsible for strengthening the Association's position in records management particularly in the area of standards, marketing, strategic planning, education. A comprehensive revision of the Memorandum and Articles of Association was also initiated. In looking forward to the next twelve months, it is important to realise that the Branch is only as good as the commitment of its members and the members of the Branch Council. Accordingly if you feel that you can

## Tasmania Branch Report

The Branch has maintained its high level of activity with monthly courses or information sessions attracting good attendance. Unfortunately some of the more expensive training courses which involved the employment of interstate consultants have not been well patronised and one actually had to be cancelled. However, we will continue to explore all avenues in order to provide our members with quality presenters at the lowest possible cost. The Model Policy for Records Management in Tasmanian Government

Agencies was presented at two sessions - one for management and one for records management practitioners - organised by the Branch. We are most supportive of this initiative of the Department of Premier & Cabinet and hope that all agencies will adopt the recommendations contained in the policy. It is a giant step forward in the fight for adequate recognition of the importance of good records management in organisations. The Branch is proud to announce that as an ongoing commitment to further education we have established a scholarship fund to assist members who wish to

## Branch President Denis Comber, ARMA

contribute in any way and want to become a member of Branch Council, then please contact our Secretary, David Lilley. The challenge for the coming year is to identify issues of interest for discussion and examination and to ensure that these issues are brought to the attention of Branch Council and if need be, Federal Council. As our work environment is continually changing it is equally important that members of the Association make a commitment to the pursuit of excellence in our profession. I look forward to seeing as many of you as possible at our 1996 Annual General Meeting and on behalf of Branch Council, I would like to thank you for your support over the last twelve months.

## Branch President Trish Wichmann ARMA

undertake a degree course in records management at a recognised Australian university. The inaugural scholarship will be awarded shortly. Keyword AAA was the subject of two consecutive workshops held in late July and development of disposal schedules will be tackled at two workshops, one in the north of the State and one in the South, later this month. That will finalise the current Education Committee's program and we look forward to some new blood with new ideas on the incoming committee.



# Branch Reports

## QLD Branch Report

**T**he Branch has continued with a busy program of education and professional continuing education over the past few months. The afternoon seminar series has covered a diverse range of issues relevant to contemporary records management. Recent seminars have covered topics ranging from *Steps to Purchasing a Computerised Records*

*Management System, Issues in Outsourcing and Getting People to do What You Want.* Planning for the 1996/97 series is underway. Each seminar is videotaped and is available for purchase from the Branch Secretary for \$20.

The Advanced Certificate in Records Management students successfully completed Term 1 subjects of Evaluating Records Management Software and the Law and Records

Management. Term 2 has commenced with the modules Records Management Client Services, Multi-Media and Classification Systems being offered. Feedback from students indicates that there is a high degree of enthusiasm for moving to the competency based learning system.

**Philip Taylor MRMA**  
**Vice President**  
**Education and Professional Development**

## ACT Branch Report

**T**he ACT Branch has been busy organising the *1996 National Convention*. Registrations have been flowing in steadily and there has been a good response to sponsorship and industry exhibition with many of the booths sold already. The Branch is looking forward to a successful Convention and we encourage all members to register for what we consider to be a very topical and though provoking Conference.

In June the Branch held a seminar featuring Chris Fripp from the Sutherland Shire Council. Chris specialises in the implementation of computerised records management systems and has completed the implementation of a Document Management System that fully integrated electronic and physical records at the Department of Transport. He is now implementing a Document Record Management System at the Sutherland Shire Council. The topic of the seminar was Document Management - Technology Implementation Options

"What you really need to know" and question time prompted some lively discussion.

In July following our AGM we will be holding a seminar featuring Chris Taylor from the Department of Foreign Affairs and Trade. His topic is "Cyberdrol and cyberbole:

- records management in the world of text-sex, noe-paganism and virtual worlds" this seminar promises to be colourful and stimulating.

**Julie Lenson ARMA**  
**President**

## SA Branch Report

**T**his past quarter has seen considerable effort put into preparations for a seminar/workshop, arranged jointly with the SA Branch of the Australian Society of Archivists (ASA), to take advantage of David Bearman's (Archives and Museum Informatics, Pittsburgh, USA) visit to Australia. The two day event is on the theme "Why is Records Management Changing?" and is to be held on 8 & 9 July 1996.

Some of our members attended an ASA professional development seminar addressed by Associate

Professor Sue MacKemmish (Monash University) on 1 May on the Records Continuum concept. The suggestion that the RMAA and ASA combine was raised during discussion and was not rejected out of hand, although the need for extensive discussions between the two organisations before anything formal might happen was acknowledged.

A second successful open discussion general meeting was held on 30 April with Spiros Sarras (Water SA) providing much interesting and useful information on Water SA's experience in applying South Australia's Whole Government approach to records management.

Vice President Brigitte Stephen continued to represent the Branch on the COMTEC Committee (sponsor of the national annual exhibition for providers of information industry products and services) as it works towards liberalising its membership criteria with the aim of making COMTEC a more effective information industries umbrella group.

**Peter Crush**  
**President, SA Branch**



# Branch Reports

## VIC Branch Report

### Training News

A steady response to the branch's training survey from members continues. The survey is aimed at the needs of all members and the results will be used as a basis for designing a programme. We look forward to presenting the findings later this year.

### State Seminar report - towards 2000

The stated objective of the seminar was to "provide an opportunity for professionals within the field to identify and develop strategies..to effectively address...the demands of ever changing technology, legal requirements, quality and accountability."

Sixty three delegates attended the seminar and judging from comments made during informal conversations and questions asked of the speakers, many left inspired with new ideas of how to "step out of the box" and take on new opportunities.

### Publications for sale

State seminar papers are available for \$25.00 per copy. The papers are jam-packed with references on hot topics such as electronic document management and the quality accreditation process.

Papers from the 1995 national convention "Re-defining records management" are selling for \$50.00.

Do you need a reference tool for training new staff, or developing the skills of

existing staff? The Local Government Training manual provides a basis for training in records management principles which are also applicable throughout the wider private and public sectors. Pick up your copy for \$150.00.

To order a copy of any of these publications, please make your cheque payable to "RMAA Victorian Branch" and forward it with your order to:

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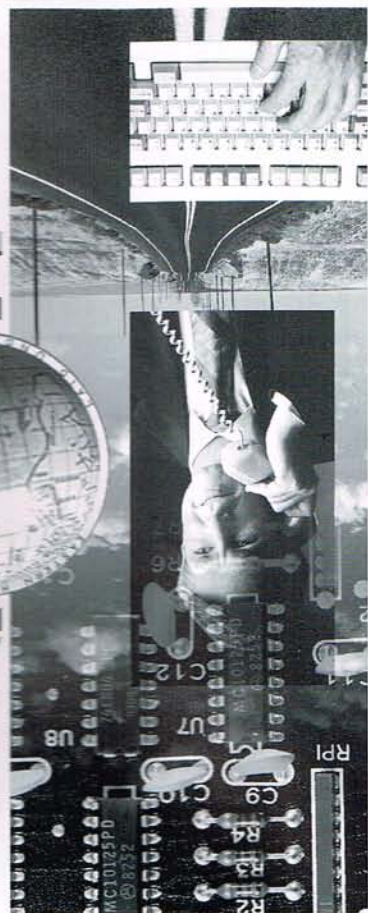
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# NEW PRODUCTS AND SERVICES

## UCollect Items Management Package

### Further Enhancements

**U**Collect continues to add features of interest to records managers and other users.

As many are aware, UCollect was the first product specifically designed to cater for management of information contained in a wide variety of physical and electronic forms. Any information type can be registered and managed throughout its life cycle. Users define their own field labels and attributes as well as business rules for each collection of information ("Item Types"). Any or all fields may be set up with links to electronic documents, established as date fields, given look-up facilities, made mandatory and indexed for search purposes.

Given the ability to index or not index different fields for each Item Type, searching for relevant information becomes easier and quicker than with conventional records management packages. Users NEVER have to nominate a particular field to search. They can also search across all or any combination of Item Types for the information they need.

### Full Text Retrieval and other improved Integrated Electronic Document Functionality

Now, UCollect users have the further option of using Full Text Retrieval to search the content of electronic documents for relevant information. The results of full text search are integrated with the results of UCollect's registered information. Electronic documents may be included in this integrated search even if they have not been registered on UCollect. Even documents newly uploaded from InterNet or IntraNet can be included!

A prime objective for UCollect has been that users will be able to manage and search all information sources using the one package. Users will not have to learn to use a separate package or to operate with a different look-and-feel.

Other electronic document capabilities have also been improved. UCollect now has a greater ability to integrate with more applications, including imaging and Mail packages. View registered images and send Mail messages incorporating details from the UCollect screens. Again, the methodology chosen is based on simplicity and ease of use.

The electronic document functionality is flexible so that you can apply your business rules to their management. UCollect offers instant access to all your electronic document information without sacrificing records management controls.

### Other Helpful Enhancements

Users will appreciate other recent enhancements:

- *Improved Navigation.* Users can access any screen and perform any task without leaving their normal module.

For example, users can search, register, move or action from any screen they are given access to. They can even run reports from the registration screen. System Administrators can also test different set-ups for an item type, viewing proposed changes to registration screens immediately and without changing modules.

- *Spell Check facilities.* These help ensure that all registrations are completed using consistently and correctly spelled words, and improve



For further information contact:  
Jenny Robins or Kim Newey  
Logical Technologies Pty. Ltd.  
Ph: (03) 9629 5200  
Fax: (03) 9629 8383  
E-mail: info@lt.com.au.



UCollect "Items Management" has offered a whole new approach to the task of managing information, whilst incorporating and automating traditional records management functionality and control. UCollect's developer, Logical Technologies, is a quality accredited, Australian owned company with wide experience in developing and supporting information systems. It works with external and in-house professionals to implement complete solutions for information management. The enhancements now released are a welcome sign of a continuing research and development which takes into account the changing needs both of users and of technology. They will be first released by Logical Technologies at the 1996 RMAA Convention at Canberra in September.

- information retrieval. Information will not 'disappear' because of a spelling mistake.
- Customisable Calendar facilities. Users may use standard or personally modified calendar to schedule their actioning/workflow, taking into account different holidays and work practices.
- Even wider range of *Alternative Platforms*. UCollect now incorporates updates in the open systems development tool, Uniface. UCollect maintains its flexibility to run under different computing platforms, including Windows, Macintosh and character-based terminals, most major databases, operating systems and network protocols without change in programming. Windows 95, AS400 and MVS environments will now also be supported, and OLE functionality added.

## UCollect Items Management System



For Further information contact Jenny Robins or Kim Newey at  
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**NEW PRODUCTS AND SERVICES**

# World first for Pickfords Records Management

**I**n a major coup for Australian ingenuity, Pickfords Records Management has introduced a new industrial-strength computer system that can dramatically reduce its clients' corporate paperwork.

The records management software, a world-first, is set to revolutionise the way Australian and international organisations deal with paperwork and time-critical customer enquiries.

Designed and built in-house, by a specialist team in Melbourne led by Pickfords Records Management General Manager, Ian Hollow, the Windows-based package has been named Pickfords\*SRMS.

Its introduction, ironically, coincides with the release of new figures revealing Australian office workers now handle 4 times as much paper as 10 yrs ago.

Pickfords\*SRMS, an acronym for Secure Records Management System, incorporates a wide range of world's-best practices, and runs in Windows on a Microsoft NT network environment.

It has the capacity to save Pickfords Records Management clients millions of dollars annually, while dramatically increasing the speed of accessing active records.

The new Pickfords software further underlines the fact that Australian service companies lead the world's records management industry by at least three to four years. It operates along familiar lines to other windows software packages, such as Word and Excel.

For the more technically minded, the Pickfords\*SRMS database is produced in SQL Server V6.0, and the front-end in Visual Basic V3.0.



*Part of the team responsible for Pickfords Records Management's world IT breakthrough.*

*Back (from left): Ian Harrop, Alan Yeung, Ian Hollow (Pickfords Records Management Director and General Manager), Glenn Howarth, Darren Haw.*

*Front (from left): Thess Reeders, Garry Stephenson (Project Manager). Not pictured is Stephen Lean, who was busy as usual.*



For More Information, Please Contact:

Ian Hollow

Garry Stephenson

Glenn Howarth

Pickfords Records Management

Ph: (03) 9586 7222

Fax: (03) 9587 2709



- Runs in Windows on Microsoft NT network environment.
- Screens developed in Visual Basic V3.0 using SQL Server V6.0 database.
- Multi-user across network functionality.
- Divided into modules for user-convenience and ease of training.
- Complete flexibility allows the system to change as user changes.
- Security control allows selected access, if required.
- Invoice flexibility for today's corporate needs.

**Pickfords\*SRMS. The architecture.**

- Dial-up and interrogation facilities.
- National indexing database meets requests from any site in Australia.
- Data redundancy by backing up data on other states' systems.
- Flexible and upgradable.

Pickfords\*SRMS evolved after Pickfords Records Management in Australia searched the world for a whole-of-service computer system that would allow their clients to effectively ignore paper records and get on with business. After analysing software in the USA, UK, Europe, Japan and the Far East, they confirmed such a program didn't exist. So, being Pickfords Records Management, and being Australian, they designed and built it themselves. Pickfords\*SRMS is now being implemented throughout Australia and New Zealand and offers 3 interfaces: View, Access and Direct. Choice of interface depends on the nature of the client's own software environment. **Pickfords\*SRMS. The software.** Industrial strength records management software.

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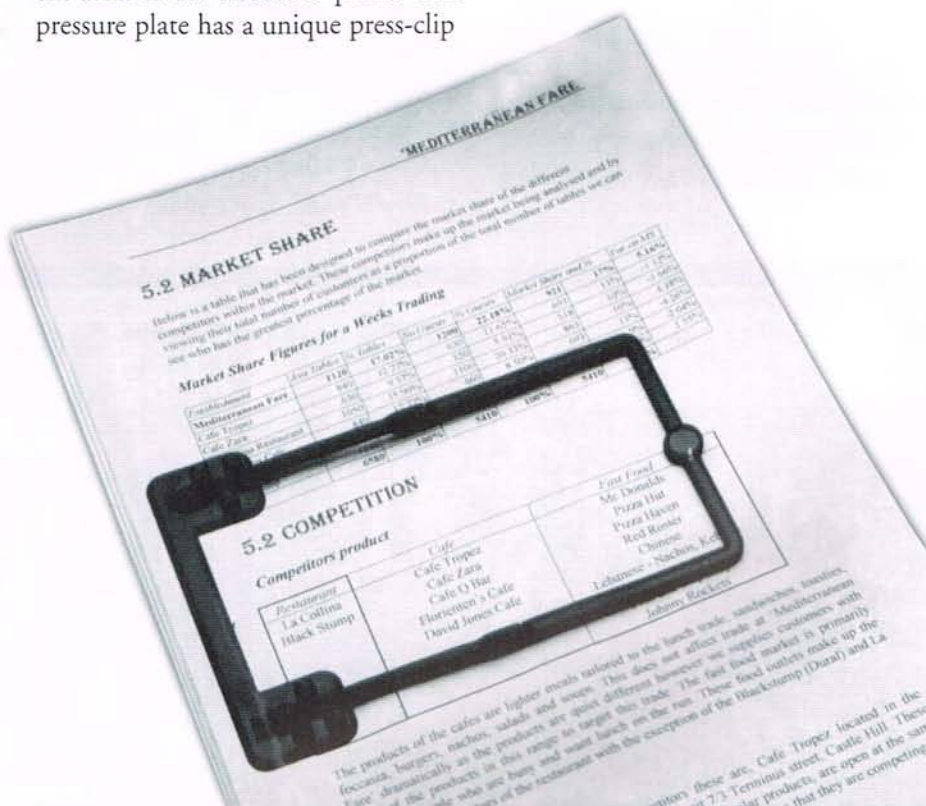
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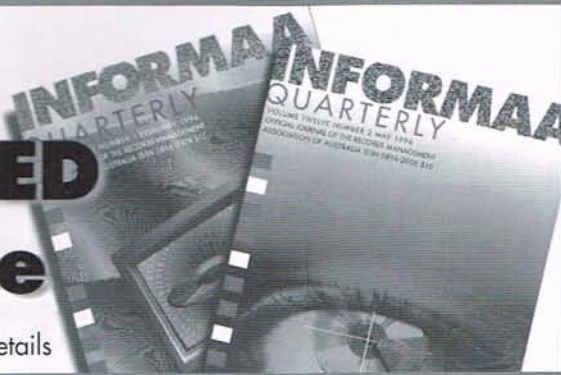
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  - "Reasons", an innovative, new Australian-designed and manufactured office panel system from Bvisco. A unique feature of the product is 'horizontal' movement, allowing work surfaces and storage components to be independent of panel width. Work surfaces, overhead storage and other "Reasons" panels slide horizontally, left or right.
  - Office support services of the future from Outsource Australia;
  - A new switchboard maintenance service offering 24 hour response, 365 days a year, from K E Brown Electrical Switchboards;
  - The new "Integra" series cupboards with five door variation and new "Accufile" lateral file pockets from CSM Office Furniture Solutions;
  - A new ergonomic accessories range, monitor arm range, executive furniture range and inflatable back supports from Direct Ergonomics;
  - New light save load reduction products from Energy Conservation Systems;
  - Modulease, a carpet leasing program from Felrex Modular Carpets;
  - Commercial and Medical filing specialists, Optiplan Australia, will release Optunit, a very durable, polyurethane edged unit;

Australia's 6th Facility Planning & Management Exhibition, more than 100 companies for facility managers, architects, interior designers, records managers, building owners and CEOs. The exhibition and seminar series will be held at the Sydney Convention and Exhibition Centre, Darling Harbour from 4-6 Sept. 1996. Staged in conjunction with the Facility Management 96 National Conference, the exhibition provides an excellent opportunity to see the latest technology and products in one place at one time.

A highlight of this year's exhibition is a new Ergonomic Showcase. The showcase will dispel ergonomic myths and show that ergonomic office environments can be good-looking as well as healthy and comfortable workplaces. "Facility Management is the management of an organisation's facilities and pulls together many job functions traditionally handled in an uncoordinated fashion by separate departments. Facility Management is the business practice of planning, providing and managing a productive and cost effective work environment," said Malcolm Hamilton, Exhibition Manager. Facility Management 96 provides a service to facility managers and other executives by bringing together the latest developments for industry in a world class exhibition of new products and services," Mr Hamilton said.



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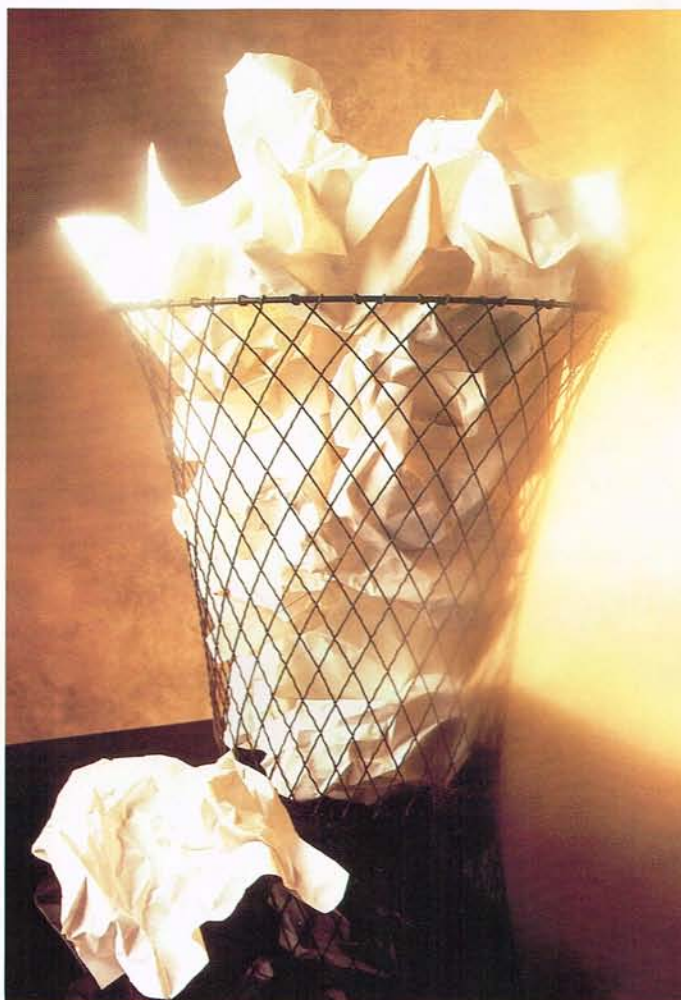
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