

LIBR 2295: Introduction to Records Management

Online Section (Brightspace) W01

Term: January – April2024 (Spring Term)

Instructor: Guy Robertson

Scope of course

This course is designed to introduce the major aspects of records management and allied fields such as archival practice and information security. Students will learn through online notes and presentations, research, and the completion of three assignments. There will also be a final examination.

General learning outcomes

Having completed this course, the student will be able to:

1. Discuss the place of records management in the context of the information professions.
2. Discuss the essential relationship between records management and archival practices
3. Identify the major components of the Life Record
4. Develop records inventories in different kinds of organizations
5. Develop and revise records retention policies and procedures
6. Identify and work with different kinds of filing systems
7. Carry out basic electronic records management (ERM) tasks
8. Develop vital records policies and procedures in different kinds of organizations
9. Explain and work with Canadian privacy legislation and its implementation in different sectors
10. Carry out basic preservation and conservation techniques
11. Explain and plan for media migration: from paper to microfilm and digital formats
12. Carry out business continuity planning for records departments and archives

Learning outcomes and critical elements

1. Discuss the place of records management in the context of the information professions

- Discuss the basic history of records management and its development as a profession
- Analyze similarities and differences between records management and other information professions; identify the major “shared tools”
- Explain the records management perspective on information control

2. Explain and work with the essential relationship between records management and archival practices

- Explain the different roles and responsibilities for records managers and archivists in various organizations
- Work with records managers’ and archivists’ perspectives on document processing, conservation and storage
- Identify potential conflicts between records managers and archivists in areas of mutual concern

3. Identify the major components of the Life Record

- Explain the structure and meaning of the Life Record
- Recognize various kinds of deterioration and loss in individual Life Records
- Identify the different kinds of documents and other materials that constitute a Life Record

4. Develop records inventories in different kinds of organizations

- Analyze the ways in which records are disseminated or scattered throughout organizations
- Carry out temporary onsite storage practices
- Work with the best ways to collect and record inventory data
- Explain the need for regular updates of records inventories

5. Develop and revise records retention policies and procedures

- Explain and justify records retention timeframes for different kinds of records
- Work with legislation governing specific retention periods
- Carry out retention schedule compilation and updating
- Explain and carry out retention schedule revision

6. Identify and work with different kinds of filing systems

- Identify the major kinds of filing systems in different organizations
- Recognize the strengths and weaknesses of different filing systems
- Explain the ways in which filing practices have changed with the implementation of IT
- Organize a basic filing system in a small office
- Work with different records classification systems

7. Carry out basic electronic records management (ERM) tasks

- Discuss the history and development of ERM
- Discuss the advantages and risks involved in ERM
- Discuss and anticipate potential problems in converting to electronic formats
- Make preparations for setting up an ERM system in different kinds of organizations
- Carry out the essential tasks involved in maintaining an ERM system
- Identify, organize and store ERM systems documentation

8. Develop vital records policies and procedures in different kinds of organizations

- Analyze the differences between vital and non-vital records
- Discuss the key points in vital records policies
- Discuss the relation between vital records and archives
- Explain and work with the role of vital records in business resumption and continuity

9. Explain and work with Canadian privacy legislation and its implementation in different sectors

- Explain the reasons for Canadian privacy legislation and its implications in public and private sectors
- Describe Federal and Provincial privacy legislation, and understand key terms and definitions
- Explain the records manager's role in privacy legislation compliance
- Explain the challenges that organizations face in complying with privacy legislation
- Be prepared to answer employers' questions regarding privacy legislation implementation in different workplaces

10. Carry out preservation and conservation techniques

- Recognize different kinds of media deterioration and their causes
- Implement emergency preservation and conservation techniques
- Plan and implement preservation and conservation programs in records centres and archives
- Plan different kinds of storage programs for active, semi-active and inactive records

11. Explain and plan for media migration: from paper to microfilm and digital formats

- Describe the characteristics of microfilm and digital formats
- Explain the reasons for migrating to different media

- Justify migration costs and facilitate budgeting and purchasing
- Assist in the management of migration projects
- Describe the role of the information manager in different organizations

12. Carry out business continuity planning for records departments and archives

- Explain the need for access to vital records and information following business disruptions
- Describe the essential components of a business continuity plan
- Describe the process of business recovery in records centres and archives
- Facilitate regular audits of business continuity plans for records centres and archives

Assignments and assessment

Students will be assessed on the basis of:

- Participation (10%)
- Life Record Inventory OR genealogy documentation assignment (30%)
- Privacy assignment (10%)
- Records management portfolio, including a proposal (30%)
- Final examination (20%)

Note: Students must submit **all** assignments and the final examination to receive credit for LIBR 2295.

Policies:

As a student at Langara, you are responsible for familiarizing yourself and complying with the following policies:

[E1003 - Student Code of Conduct](#)

[F1004 - Code of Academic Conduct](#)

[E2008 - Academic Standing - Academic Probation and Academic](#)

[Suspension](#)

[E2006 - Appeal of Final Grade](#)

[F1002 - Concerns about Instruction](#)

[E2011 - Withdrawal from Courses](#)

[B5003 - Copyright Compliance](#)