



# Managing Records: A Handbook of Principles and Practice

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## Description

Many organizations do not yet have a formal programme of records management, but increasingly they are recognizing the benefits of well managed records and the serious consequences of inadequate records systems. Establishing records management and maintaining an effective programme requires specialist expertise. This essential manual of practice provides a detailed guide to the concepts, skills and techniques of records management for organizational staff who have a responsibility for setting up, maintaining or restructuring a records management programme. It offers invaluable advice on the management of records in both electronic and traditional paper media, and focuses on the following areas: - understanding records management - analysing the context for records management - classifying records and documenting their context - creating and capturing records; managing appraisal, retention and disposition - maintaining records and assuring their integrity - providing access - implementing records management. The appendices provide a wealth of additional information including a list of standards for records management, an annotated bibliography and sources of further information, and details of professional and advisory bodies. Readership: This much needed manual is an indispensable purchase for organizations wishing to introduce better practices for managing their records. The book is intended to be of value to experienced records managers as well as LIS practitioners and newcomers to the field. It should be on the desk of every manager and every information professional with responsibility for records management.

## Contents

1. Understanding records management 2. Analysing the context for records management 3. Classifying records and documenting their context 4. Creating and capturing records 5. Managing appraisal, retention and disposition 6. Maintaining records and assuring their integrity 7. Providing access 8. Implementing records management: practical and managerial issues 9. Conclusion Appendix A. Bibliography and sources of further information Appendix B. Select list of national and international standards

Appendix C. Professional organizations for records managers in English-speaking countries.

#### Author

**Geoffrey Yeo** is an Archives and Records Management specialist at the Department of Information Studies, University College London.

**Dr Elizabeth Shepherd** qualified as an archivist and worked in archives and records management in local government before becoming a records management specialist at TFPL Ltd. In 1992 she was appointed in the Department of Information Studies at University College London (UCL), to update and revise the MA in Archives and Records Management of which she was programme director until 2002. In 2003 she was appointed a senior lecturer, in 2007 Reader, and Professor of Archives and Records Management in 2011. She teaches concepts and contexts and the recordkeeping professional and co-ordinates the research skills module for doctoral students in DIS.