



DEPARTMENT OF BUSINESS AND OFFICE ADMINISTRATION

COURSE OUTLINE – OPEN ENROLMENT ON LINE DELIVERY

OA2081 COMPREHENSIVE RECORDS MANAGEMENT – 3 CREDITS (3 -0-0) 45 HOURS

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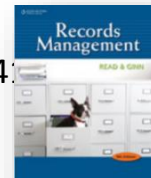
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OFFICE HOURS: Please contact me
anytime by email or
phone or text my cell [Click here to enter text.](#)

PREREQUISITE(S)/COREQUISITE:

REQUIRED TEXT/RESOURCE MATERIALS:

Records Management (Read & Ginn) 9th Edition ISBN: 97805387314



Exploring Getting Started with Microsoft OneNote for Office 2013 (Poatsy and Grauer) Prentice Hall. 2015. ISBN: 9780133434323



CALENDAR DESCRIPTION:

This course focuses on the fundamentals of Records Management in a paper-based system, including a review of basic filing techniques. Coverage is also provided for

filing and maintenance of automated, micro-image and electronic imaging records. OneNote, Outlook (electronic message records management) and Access. Students will gain an understanding of the Freedom of Information and Protection of Privacy Act.

CREDIT/CONTACT HOURS:

3 credits 45 contact hours

DELIVERY MODE(S):

On Line Delivery

CALENDAR OBJECTIVE:

This course will cover the fundamentals of Records Management in a paper-based system, including a review of basic filing techniques. Coverage is also provided for filing and maintenance of automated, micro-image and electronic imaging records including exploration and investigation of current digital records management software, OneNote, Outlook, and Access. The course will introduce current information and records management hardware such as digital and optical scanners and cameras. The course will have students complete FOIP and COPYRIGHT online training (<http://www.foip.gov.ab.ca/training/onlinetraining.cfm>), prepare a disaster recovery plan for vital records, and prepare a Records and Information Management Manual suitable for office use.

LEARNING OBJECTIVES:

Chapter 1 Records Management

You will:

1. Discuss the challenges of the information explosion to records managers.
2. Describe the importance of records Management to an organization.
3. Describe how records are classified and used in businesses.
4. Discuss relevant legislation that affect records management.
5. Describe the management functions necessary to operate a records management program effectively.
6. Identify possible careers in records management.
7. Access the website that provides related information for the textbook.

Chapter 2 and 3 Alphabetic Indexing

You will:

1. Explain the need for indexing rules in alphabetic storage of records and the importance of following these rules consistently.
2. Index, code, and arrange personal and business names in indexing order of units.
3. Index, code and arrange minor words and symbols in business names.
4. Index, code, and arrange names with punctuation and possessives.
5. Index, code, and arrange names with single letters and abbreviations.
6. Apply alphabetic filing procedures.
7. Prepare and arrange cross-reference for personal and business names.
8. Sort personal and business names.
9. Find information in database records.
10. Index, code, and arrange personal and business names with titles and suffixes.
11. Index, code, and arrange personal and business names with articles and particles.
12. Index, code, and arrange business names with numbers.
13. Apply alphabetic filing procedures
14. Prepare and arrange cross-references for business names.

Chapter 5 Electronic File Management

You will:

1. Describe elements found in an electronic database.
2. Find and sort data in an electronic database.
3. Describe how databases can be used in records management and e-commerce.
4. Describe the differences in how records are sorted manually and by computers.
5. Describe the life cycle for electronic records.
6. Describe and apply electronic file management.

Chapter 6 Alphabetic Records Management, Equipment, and Procedures

You will:

1. Explain terms used in correspondence records management systems.
2. Identify the basic types of equipment and supplies for correspondence records storage.
3. Explain considerations for selecting storage equipment and supplies and simulate purchase of same.
4. Describe types of information that should be determined before selection and design of an alphabetic records system and design sample of same.

5. Explain how color can be used in correspondence records storage.
6. Apply procedures for storing correspondence.

Chapter 7 Storing, Retrieving, and Transferring Records

You will:

1. Explain the importance of develop and implementing a records retention program.
2. List the four values of records, describe each value, and provide an example of each value.
3. Discuss the records inventory, including what it is, why it is done, and what it includes.
4. Describe a records retention schedule and explain its purpose.
5. Discuss manual and automated retrieval procedures.
6. List reasons for transferring records
7. Discuss types of records center control files.
8. List capabilities of typical records center software.

Chapter 8 Subject Records Management

You will:

1. Define subject records management.
2. List advantages and disadvantage of storing and retrieving records by subject.
3. Compare and dictionary and encyclopedic subject file arrangements.
4. Describe the guides, folders, and labels used for subject records storage and complete a practical assignment using electronic record for same.
5. Describe four indexes and their use for subject records management.
6. List the steps used when storing and retrieving records stored by their subjects.
7. Use computer software to prepare an index for subject records.
8. Store and retrieve records following subject records procedures.

Chapter 9 Numeric Records Management

You will:

1. Define numeric records management and list three reasons for its use.
2. Describe the components of a consecutive numbering storage method and procedures for this method.
3. Describe how to convert an alphabetic records arrangement to a consecutive numeric records storage.
4. List advantages and disadvantages of consecutive numeric records storage.

5. Compare and contrast consecutive, terminal-digit, and middle-digit numeric records storage.
6. Define chronologic records storage and explain its use.
7. Compare and contrast block-numeric, duplex-numeric, decimal-numeric, and alpha-numeric coding.
8. Explain how computer indexes and database software can be used with numeric records management.

Chapter 10 Geographic Records Management:

You will:

1. Read lecture notes describing geographic records management.

Chapter 11 Electronic and Image Records

You will:

1. Define electronic record and image records and describe the relationship between the two records media.
2. Define magnetic media and optical media and list three types of each media.
3. Discuss retention for active and inactive electronic records.
4. Discuss records safety and security.
5. List and describe four types of microform and four factors related to microfilm quality.
6. Describe microform storage, retrieval, and storage environments.
7. Discuss image records retention.
8. Discuss RIM software for electronic and image records.

Chapter 12 The Records and Information Management Program

You will:

1. List components of a records and information management (RIM) program.
2. List responsibilities of a RIM program.
3. Define and describe the purpose of a records audit.
4. Explain the purpose of a records and information management manual.
5. List guidelines for constructing a well-designed form.
6. Explain the phases of a disaster recovery plan.
7. Define and describe knowledge management.
8. Discuss the use of RIM software.
9. List actions taken to implement a retention schedule.

Microsoft OneNote:

You will:

1. Learn to use a computer to create, manage, integrate, and synchronize OneNote Notebooks.
2. Integrate Office files and learn how to add content to OneNote 2013.
3. Use tools and templates.
4. Learn how to work online and collaborate with OneNote.
5. Learn to use OneNote Notebooks and install and use the Windows 8.1 OneNote App.

Disaster Recovery Plan

You will prepare a Disaster Recovery Plan.

FOIP

You will complete the Government of Alberta FOIP on-line training course.

COPYRIGHT

You will complete the GPRC Copyright course.

RIM Manual

You will create a OneNote and Traditional Records and Information Management Manual suitable for office use.

TRANSFERABILITY:

**** Grade of D or D+ may not be acceptable for transfer to other post-secondary institutions. Students are cautioned that it is their responsibility to contact the receiving institutions to ensure transferability**

GRADING CRITERIA:

GRANDE PRAIRIE REGIONAL COLLEGE			
GRADING CONVERSION CHART			
Alpha Grade	4-point Equivalent	Percentage Guidelines	Designation
A ⁺	4.0	90 – 100	EXCELLENT
A	4.0	85 – 89	
A ⁻	3.7	80 – 84	FIRST CLASS STANDING
B ⁺	3.3	77 – 79	
B	3.0	73 – 76	GOOD
B ⁻	2.7	70 – 72	
C ⁺	2.3	67 – 69	SATISFACTORY
C	2.0	63 – 66	
C ⁻	1.7	60 – 62	
D ⁺	1.3	55 – 59	MINIMAL PASS
D	1.0	50 – 54	
F	0.0	0 – 49	FAIL
WF	0.0	0	FAIL, withdrawal after the deadline

EVALUATIONS:

All work must be completed in order to get credit for this course.

Item	WEIGHTING
Chapter Assigned and Test Activities Work Points are assigned to each chapter and then totaled to establish a final percentage on the assigned and test activities.	40%
Disaster Recovery Plan	10%
FOIP Certification Course	5%
COPYRIGHT Mini-course Complete	5%
ONE NOTE Assignments and Test	20%
Records and Information Management Manual	20%
Total	100.00%

STUDENT RESPONSIBILITIES:

All assigned work must be completed by the deadline in order to get a grade in the course.

STATEMENT ON PLAGIARISM AND CHEATING:



Refer to the College Policy on Student Misconduct: Plagiarism and Cheating at

https://www.gprc.ab.ca/files/forms_documents/Student_Misconduct.pdf

**Note: all Academic and Administrative policies are available at

<https://www.gprc.ab.ca/about/administration/policies/>



COURSE SCHEDULE/TENTATIVE TIMELINE:

Procedure: All assigned work is to be submitted through Moodle. Please call me for help with the first submission as listed in the schedule below. All assigned work must be complete and graded to qualify to do the test activity. Once the assignments are complete, please contact me to set-up a time to complete your test activity. Test activities have a 2 hours deadline for completion once available. A 24 hours grading policy will be followed. That is, I will mark all assignments and return graded work within 24 hours of submission.  Those items coded with  indicates a file that will be required for your Records and Information Management Manual. This manual will be created in ONE NOTE and traditionally (see RIM Manual in Moodle). Contact me anytime! as I understand that life happens and the schedule can be flexible.


OA2081 Comprehensive Records Management WEEKLY COURSE SCHEDULE

(This is a 15 week course. All work must be completed to get a grade in the course. Please do not hesitate contact me anytime should you need to discuss deadlines for assigned work. Of course, you are encouraged to work ahead of schedule to complete the course in a time that works best for you. I will maintain a 24 hour grading schedule and returned graded work to you within 24 hours of receipt.)



Chapter 1 An Introduction to Records Management

Assigned Work
Read Chapter 1 and complete Review and Discussion Question 
Watch PowerPoint Presentation (optional)
Recreate the "Life Cycle of a Record"  <i>HINT: use MS Word Smart Art Cycle</i>
Do Chapter 1 Test Activity – CONTACT ME TO SET UP A TIME FOR THIS ACTIVITY
Due: Week 1, Friday, 6 p.m.





Chapter 2 & 3 Alphabetic Indexing (Review)

Assigned Work
Read Chapter 2, 3 as a review of Alphabetic Indexing Rules Read Cross Reference Lecture Notes
Watch PowerPoint Presentation (optional)
 Do Placement Test NOTE: A grade of 90% or better indicates that you are ready for the test activities.
Do Chapter 2 and 3 Test Activities
Due: Week 2, Friday, 6 p.m.



Chapter 5 Electronic File Management

Assigned Work
Read Chapter 5 and Lecture Notes 
Watch PowerPoint Presentation (optional)
 Do Chapter 5 Review and Discussion Questions
Application 5 – 1 Create a Logical Folder Structure p. 156 Once complete please compress the Sheraden Investments Folder and drop in Moodle.
Application 5-2 In put and Sort Records p. 156 - 157 Once complete please drop in Moodle the 5-2 Customers Access database with the saved Customer Table and Business Query.
Do Chapter 5 Test Activity
Assignments Due: Week 3 Friday at 6 p.m.



Chapter 6 Alphabetic Records Management, Equipment, and Procedures

Assigned Work
Read Chapter 6 and Lecture Notes 
Watch PowerPoint Presentation (optional)
 Do Chapter 6 Review and Discussion Questions
Complete Getting the Right Equipment and Supplies Assignment 
Complete Traditional File Drawer and Alphabetic Correspondence Assignment 
Do Chapter 6 Test Activity
Assignments Due: Week 4 Friday at 6 p.m.

Chapter 7 Storing, Retrieving, and Transferring Records

Assigned Work
Read Chapter 7 and Lecture Notes 
Watch PowerPoint Presentation (optional)
 Do Chapter 7 Review and Discussion Questions
Complete Application 7-1 p. 238 Upon Completion Drop the Access File 7-1 Retention Schedule Access Database file with the Reports and Queries saved within the database.
Do Chapter 7 Test Activity
Assignments Due: Week 6 Friday at 6 p.m.

Chapter 8 Subject Records Management

Assigned Work
Read Chapter 8 and Lecture Notes 
Watch PowerPoint Presentation (optional)
 Do Chapter 8 Review and Discussion Questions
Complete Application 8-1 p. 271 Upon Completion Drop the Access File 8-1 Master Index Access Database file with the sorted Master Index Table, the Office Equipment Query and the Master Index Report saved within the database.
Complete Application 8-2 p. 272 Upon Completion Drop the Access File 8-2 Relative Index Access Database file with the Relative Index Report saved within the database.
Complete the Electronic Correspondence Subject Filing Assignment
Do Chapter 8 Test Activity 1 and Test Activity 2
Assignments Due: Week 7 Friday at 6 p.m.

Chapter 9 - Numeric Records Management

Assigned Work

Read Chapter 9 and Lecture Notes 

Watch PowerPoint Presentation (optional)

 Do Chapter 9 Review and Discussion Questions

Complete Application 9-1 p. 304

You can arrange these manually or key manually into a Word table and drop the file into Moodle.

Complete Application 9-2 p. 305

Upon completion drop into Moodle the Access File 9-2 Number Arrangements Access database file with the Terminal Digit, Middle Digit and Consecutive Order saved queries.

Complete Application 9-3 p. 305

Link to the web site and answer the questions.

Do Chapter 9 Test Activity

Assignments Due: Week 8 Friday at 6 p.m.



Chapter 10 Geographic Records Management

Assigned Work



Read Chapter 10 Lecture Notes 

On to Chapter 10

Chapter 11 Electronic and Image Records

Assigned Work
Read Chapter 11 and Lecture Notes 
Watch PowerPoint Presentation (optional)
 Do Chapter 11 Review and Discussion Questions
Complete Outlook Module
Complete Application 11-2 p. 378 Upon completion drop the file with the directory and file names into Moodle.
Complete Application 11-3 p. 379 Upon completion drop the Access file 11-2 Records Index with the saved report into Moodle.
Do Chapter 11 Test Activity
Assignments Due: Week 9 Friday at 6 p.m.

Chapter 12 The Records and Information Management Program

Assigned Work
Read Chapter 12 and Lecture Notes 
Watch PowerPoint Presentation (optional)
 Do Chapter 12 Review and Discussion Questions
Do Application 12 – 1 p. 405 Note: You will design the form in Word using the fill-in form features. Ensure that the form is protected to allow for fill-in only before sending it for grading.
Do Application 12 – 2 p. 406 Complete the application and drop the new database file named 1-2 Automobile Registration Database with the saved forms and saved report into Moodle. You can interview two people you know rather than two classmates.
Do Application 12 – 3 p. 408
Do Chapter 12 Test Activity
Assignments Due: Week 10 Friday at 6 p.m.


MICROSOFT ONE NOTE

Assigned Work
OneNote Chapter 1 Getting Started with OneNote 2013 Introduction to OneNote: Creating and Managing OneNote Notebooks 1. Hands – On Exercise 1 Creating and Managing OneNote Notebooks 2. Hands – On Exercise 2 Add Content to OneNote 2013 3. Practice Exercises 1 & 2
OneNote Chapter 1 Getting Started with OneNote 2013 Hands-On Exercise 1 Use Tools and Templates Hands-On Exercise 2 Working Online and Collaborating with OneNote OneNote Chapter 2 Practice Exercises 1 & 2
OneNote Chapter 1 Exam
OneNote Chapter 2 Getting 2013
Assignments Due: Week 12 Friday at 6 p.m.


DISASTER RECOVERY PLAN

ITEM
Business Report Format Title Page Double spaced throughout Headers Error free (-3 for each error)
Includes: <ul style="list-style-type: none"><input checked="" type="checkbox"/> What is a disaster recovery plan<input checked="" type="checkbox"/> Includes levels of risk and description<input checked="" type="checkbox"/> Includes the difference between an emergency and a disaster<input checked="" type="checkbox"/> Covers risk assessment<input checked="" type="checkbox"/> Covers how to develop a d
Assignments Due: Week 15 Friday at 6 p.m.

FOIP

Assigned Work
Read Chapter FOIP and Lecture Notes 
Complete Government of Alberta on-line FOIP course
Assignments Due: Week 15 Friday at 6 p.m.

COPYRIGHT

Assigned Work
 Complete GPRC Copyright Course
Assignments Due: Week 15 Friday at 6 p.m.

RIM MANUAL ONENOTE AND TRADITIONAL MANUAL FINAL PROJECT

Assigned Work

Complete ONENOTE Records and Information Management Binder and Traditional Manual

Assignments Due: Week 16 Friday at 6 p.m.

MAIL YOUR RIM MANUAL BINDER TO:

Sharron Barr, Instructor
Office Administration
Grande Prairie Regional College
10726 – 106 Avenue
Grande Prairie, AB T8V 4C4

Please include a return address and I will return the binder to you once I have graded it.