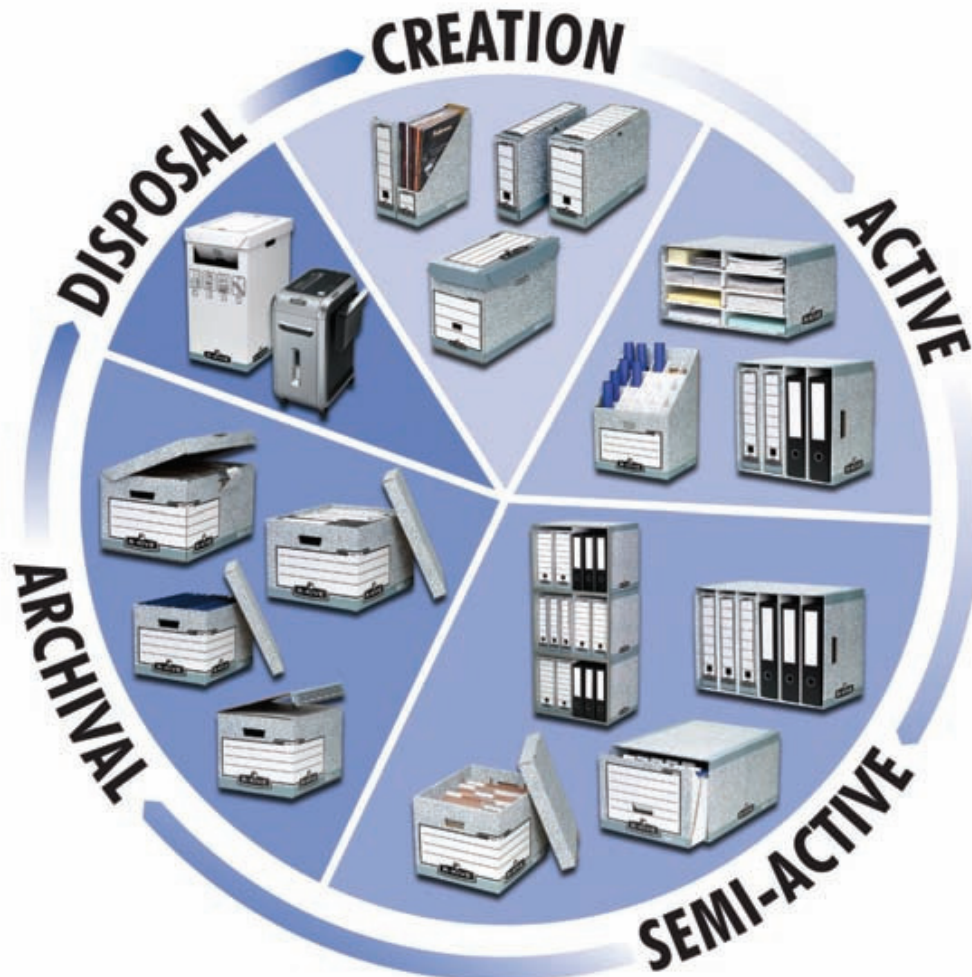


? HOW TO CHOOSE - The Records Management Life Cycle



The Five Stage Records Management Life Cycle.

Use the Records Management Life Cycle to choose the product to best suit your needs.

The lifetime of a document can be classified in the following ways:

1. **Creation** → As soon as someone decides to keep a piece of information (magazine files & transfer files).
2. **Active** → Information that is frequently referred to (storage units).
3. **Semi-Active** → Information that is not regularly used but has to be kept e.g. for legal reasons (storage units).
4. **Archival** → Information that has a long term, probably historical value (storage boxes).
5. **Disposal** → Destruction by shredding then recycling (recycling bin or shredder).

? RECORDS MANAGEMENT - Getting Started

1. Know what you have got.

The best way to find out is to conduct an audit. List the types of records and their storage medium (paper, microfiche, electronic etc), their subject matter, and anything else you need to get an overview.

2. Know how much you have got.

Make an inventory of quantities and volumes - how much space do the records in each category occupy and what type of equipment is used to store them?

3. Know where it is kept.

Check all possible storage spaces. Start with offices (check desks and cupboards), and work outwards to shared and more remote areas (including off-site stores).

4. Know how long it is being kept for.

Aim to minimise the retention period. Confirm the legal, regulatory and business requirements and check that they are being applied. Dispose of confidential material securely by shredding, burning or by recycling it.

5. Know what to do about it.

Publish a policy and guidelines so that everyone is clear about the rules to follow. Then arrange to monitor their compliance. Colleagues, supervisors, managers and auditors all have roles to play in this.