

People and Tools

The Secret to Making Records Management Sexy

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The logo for Records Solutions features a stylized, abstract graphic on the left side. It consists of several overlapping, teardrop-shaped elements in shades of orange and grey, with black outlines, suggesting a flame or a dynamic, flowing shape. The text 'Records Solutions' is positioned to the right of this graphic, with 'Records' and 'Solutions' stacked vertically in a bold, black, sans-serif font.

Records Solutions

Helping Manage Information Effectively

What thoughts are going through your head right now with that title??

People, tools, sexy.....



We are going to look at the importance of effective records management tools and how they are better implemented when using a personal customer service approach to make them more appealing and usable.



What common tools do we use??

- Commonly used records management tools
- Records Management Policy
- Business Classification Scheme
- Metadata Standard
- Retention and Disposal Schedules
- eDRMS
- Training Program
- Quality Management Program

Records Management Policy – The Tool Shed



The overarching shelter for all our tools:

- How do our users know and understand this?
- How do we implement a RM Policy?

Records Management Policy – Current Implementation

How do we implement NOW?

We rely on technology as it is:

- Cheaper
- Easier
- Trendy
- Create once
- Consistent



Records Management Policy – Current Implementation

Once we receive Management sign off and approval we usually:

- Place it on the intranet
- Promote in internal newsletter
- CEO/DG may mention it in weekly email or
- Maybe a poster in the corridor

BUT there is NO People interaction

Records Management Policy – Improved Implementation

How can we do this better?

Use the best tool we have.....

People



- Celebrate policy approval with morning teas
- Information Sessions
- Attend team meetings and explain responsibilities
- Include mention of policy when providing help over the phone.

Remember..... PEOPLE



BCS – The most used tool in the shed

Likened to a drill:

- Some of us get it and some of us don't
- Some find it easy and some find it hard



BCS – The most used tool in the shed

- Some want it simple, whilst others want more options



BCS – Current Implementation

What do we do NOW:

Once we receive Management sign off

- BCS is placed on the intranet
- Tips and tricks
- Online manuals

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Using a Business Classification Scheme (BCS)

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Executive summary

As a result of the move to full electronic document and records management (EDRM) functionality in the NTG, the Records Policy Unit of DCIS (the Records Service under the Information Act) recommends that agencies change the method of classifying records from thesaurus based classification to the use of a business classification scheme (BCS) in their processes to create and manage records. [MPT 17/14](#)

BCS – Current Implementation

What do we do NOW:

- Email key stakeholders with changes
- Promote in internal newsletter
- Maybe a poster in the corridor
- Train key users (online or in person)

BUT there is LIMITED People interaction

BCS - Implementation

How can we improve?

- Before approval, seek input from stakeholders
- Specific Training
- Train more champions, advance users, key users to share the love of the BCS
- Quality Control program with ongoing feedback



Metadata Standard – The level

Metadata provides context and keeps everything level:

- To many metadata fields
- Not the right metadata for my job
- Drop down lists for easy verification
- Free text



Metadata – Implementation

What do we do NOW:

- Not a lot, maybe some training when implementing an eDRMS.
- Do we push the need for metadata when using network drives or outlook to store records?
- Do we assess core business system metadata to see if this meets our standards?
- Do we explain that the correct author is essential. Question - is the author the person or the organisation?



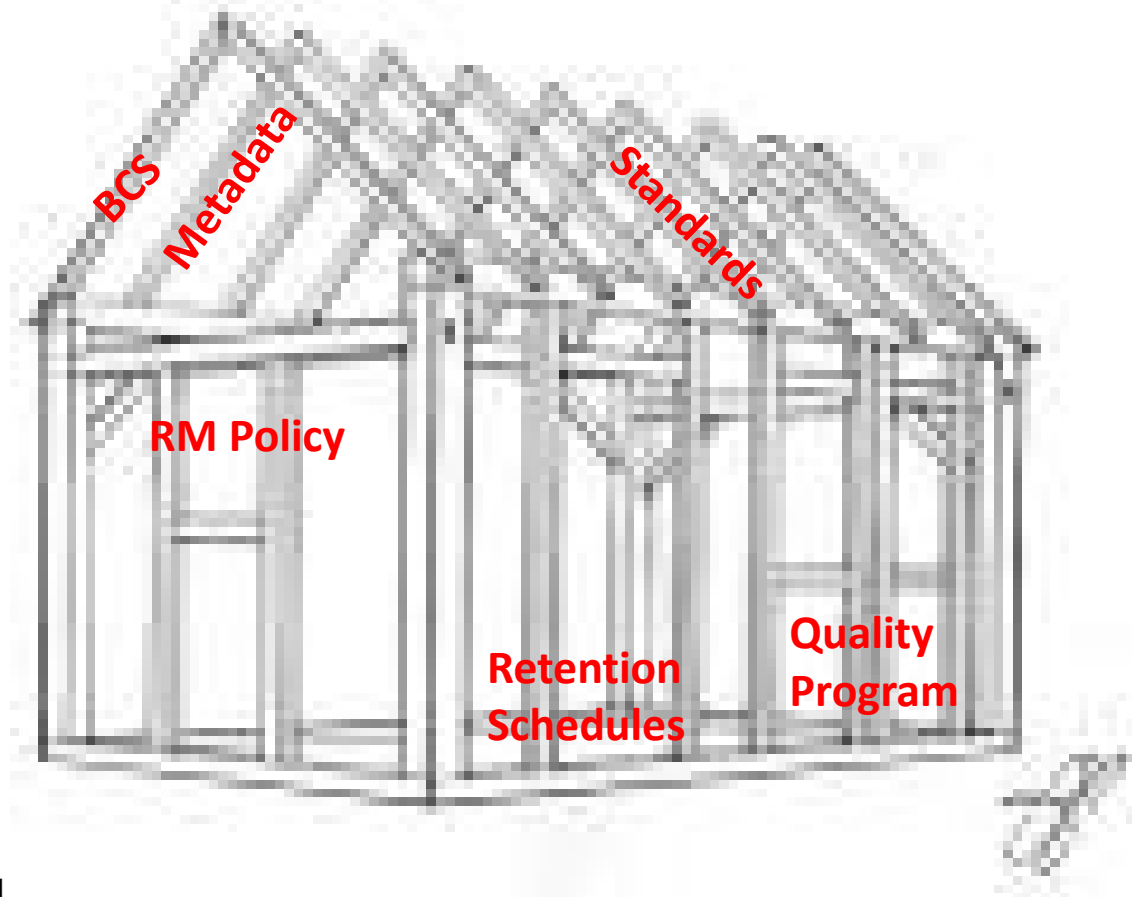
Metadata - Implementation

How can we improve?

- Seek input from stakeholders
- Specific Training for individual teams
- Same metadata to be used when saving into shared drives and Outlook
- Assess and determine core business system metadata
- Quality Control program with ongoing feedback

eDRMS – The nuts and bolts

eDRMS keeps it all together and usable:



eDRMS – Implementation

What do we do NOW:

- Change Management? Some yes and others not so much...
 - Cultural Change (lead from the top)
 - People Change (I have always done it this way)
 - Process Change (how do I incorporate this into my processes to make it easier?)
 - General Change (don't like it)
- Training.
- Posters, marketing gifts (more promotion than implementation)
- Do we explain how this can help their business processes?
- Do we make it as simple as the shared drive to use?
- Do we expect our users to be experts in records management?

eDRMS - Implementation

How can we do this better?

PEOPLE

- Staff will embrace and be more accepting if they are sold change by a person.
- Do not base your implementation strategy on technology such as the intranet, emails, newsletters and online training

YOU need PEOPLE

- To train in specifics and provide one on one support where required.
- To provide a Quality Control program with ongoing feedback
- To provide help desk support that is not a recording.

In conclusion..

People are tools



They are the best tools we have to make Records management trendy and appealing.

Remember..... PEOPLE



QUESTIONS