Introduction to Records Management

Trainers Manual
Issued: July 2012

Authority

This guideline is issued under the provisions of Section 10A of the Archives Act 1983. Guidelines issued by the State Archivist under this Section set standards, policy, and procedures relating to the making and keeping of State records. This section also requires all relevant authorities to take all reasonable steps to comply with these guidelines, and put them into effect.

Ross Latham
State Archivist

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Document Development History

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<th>Build Status</th>
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<th>Author</th>
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<td></td>
<td>1</td>
<td>27-03-2013</td>
<td>Allegra Huxtable</td>
<td>Initial Release</td>
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Amendments in this Release

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Contact for Enquiries

All enquiries regarding this document should be directed to:

Manager Government Recordkeeping

Tasmanian Archive and Heritage Office

GRK@education.tas.gov.au
How to use this manual

This manual is designed to provide consistency for anyone delivering this training workshop. It includes the following:

- Copies of the PowerPoint slides the participants see – so you know where you are in the program.
- Trainer’s notes (in purple text), including questions to ask the participants to generate discussion. The participants cannot see this text.
- Activities (in orange text) to run with the participants to ensure transfer of knowledge. This text is instructional for the trainer, and is not to be read out to participants.
- Resources to use/handouts (in green text)
- Possible answers/responses to activities or questions from participants (in blue text). If participants don’t give these answers during the activity/discussion then they provide guidelines for the trainer to ensure the correct information is disclosed and discussed.
- Timing (in pink text) to ensure the sessions stay within the allocated timeframe.
- A timing run sheet for the trainer – designed to give an overview of the sessions and timeframes for delivery, including breaks where required.
- An overview of the session including resources required at the front of the manual.

When utilised correctly, this manual should reduce preparation time for delivering this workshop and ensure that the desired learning outcomes are achieved in every session.

As you become more familiar with the content of this workshop, please add in your own examples where relevant to further contextualise the content – space has been included for you to do this throughout the manual.
If you have any questions regarding the content of this workshop, please contact the Government Recordkeeping, Tasmanian Archives and Heritage Office GRK@education.tas.gov.au

<table>
<thead>
<tr>
<th>Workshop name</th>
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| Learning outcomes | By the end of the workshop, participants will be able to:  
  • Understand the importance of recordkeeping, and your key recordkeeping responsibilities  
  • Distinguish between what is and what is not a state record  
  • Understand when a record should be created, kept and managed and when it can be lawfully deleted or destroyed  
  • Identify the key recordkeeping legislation and standards for Tasmanian Agencies. |
| Duration | |
| Resources | |
| Room setup | • Tables and chairs arranged in small groups  
  • PowerPoint slides – data-projector and laptop/pc required |
| Acknowledgements | Queensland State Archives |

Welcome
Trainer introduction – introduce yourself, where you’re from, etc.
Administration – mention the following:
  • Workshop/break/finish times  
  • Facilities – toilets, etc  
  • Emergency exits  
  • Mobile phones – please switch to vibrate, take calls outside the room if necessary  
  • PowerPoint slide handouts (3 per page).
## Course Schedule

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<td>Introduction and Learning Outcomes</td>
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<td>Activity – Personal Reflection</td>
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<td>Presentation overview</td>
<td>5 mins</td>
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<tr>
<td>9.20</td>
<td>What is a State Record?</td>
<td>40</td>
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<tr>
<td>10.00</td>
<td>Types of Records</td>
<td>15 mins</td>
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<td>Break</td>
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<td>10.35</td>
<td>Legislative and Regulatory Context</td>
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<td>Why undertake Recordkeeping</td>
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<tr>
<td>2.30</td>
<td>Break</td>
<td>20 mins</td>
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<tr>
<td>2.50</td>
<td>What Are Archives</td>
<td>15 mins</td>
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<tr>
<td></td>
<td>Key things to remember</td>
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<tr>
<td>3.30 – 4pm</td>
<td>Questions &amp; finish</td>
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Welcome

Tasmanian Archives and Heritage Office assists over 250 government agencies throughout the state to create, manage, store and preserve their state records for the benefit of all Tasmanians.

We are responsible under the Archive Act 1983 for the consistent approach by agencies for the management of state records.

This training presentation focuses on providing an introduction to general employees of Tasmanian government agencies of their recordkeeping responsibilities.

It assumes the agency has implemented processes and systems for managing records and that there is an officer responsible for managing this. It does not cover the activities associated with designing and managing these processes and systems, but focuses on communicating to general staff their basic recordkeeping responsibilities.

Trainers may wish to take this presentation and amend or add additional slides to incorporate local practices and processes.
Welcome

Trainer introduction – introduce yourself, where you’re from, etc.

Administration – mention the following:

· Workshop/break/finish times

· Facilities – toilets, etc

· Emergency exits

· Mobile phones – please switch to vibrate, take calls outside the room if necessary

· PowerPoint slide handouts (3 per page).
Training Outcomes

10 minutes

Training Outcomes

- Have an understanding of the importance of recordkeeping and your key recordkeeping responsibilities
- Be able to distinguish between what is and what is not a State record
- Have an understanding of when a record should be created, kept and managed and when it can be lawfully deleted or destroyed
- Be able to identify the key recordkeeping legislation and standards for Tasmanian Agencies

This presentation is designed to provide you with some basic information about your recordkeeping responsibilities. At the end of this presentation you should be able to:

- Understand the importance of recordkeeping and your key recordkeeping responsibilities.
- Distinguish between what is and what is not a State record.
- Understand when a record should be created, kept and managed and when it can be lawfully deleted or destroyed.
- Identify the key recordkeeping legislation and standards for Tasmanian Agencies

Personal reflection

What personal outcomes would you like to gain from this workshop?

Ask participants to think about what they want from this workshop and write them in their handouts. Give them approximately two minutes to do this. To debrief go around the room, ask participants to introduce themselves and want they would like to take away from this session/why they are there.
This presentation covers seven key aspects:

1. What are State Records?
2. Types of Records
3. Legislative and Regulatory Context
4. Why undertake Recordkeeping?
5. Roles and Responsibilities
6. Recordkeeping process and records management tools
7. What are Archives?

We look at what state records are, why we need to create, keep and manage them – from both a legal and practical perspective – and what your particular responsibilities are.
I. What are State Records?

What are records?

Throughout our lives we create numerous records and have numerous records created about us: they are an essential part of our lives.

Records are also critical to our work and we create and receive business records every day. But what exactly are records and how do they differ from other types of information?
There are many formal definitions of records but the most relevant ones include the following:

**Archives Act 1983 (Tasmania)**
A record means a document or an object that is, or has been, made or kept by reason of any information or matter that it contains or can be obtained from it or by reason of its connection with any event, person, circumstance, or thing.

**International Standard AS ISO 15489.1, s.3.15**
Any document or other source of information compiled, recorded or stored in written form or on film, or by electronic process, or in any other manner or by any other means.

There are some important aspects to this definition – crucially, a record is not defined by the form it takes. We call the definition ‘format neutral’ – a record can be paper, or electronic, or even carved in stone. What is important is that a record is evidence of a business activity.

Evidence is not in the strict ‘courtroom’ evidence sense. It just means that a record is something that shows what was done and why.

Records are both created by public authorities (such as writing a report, or processing a transaction in a database) and received by them – such as emails, letters and applications.

**Before moving to the next slide ask:**

¿ What format or medium do you think state records may come in?

- Documents
- files
- audio – cds, etc, video or optical media – dvds, videos, etc
- maps,
- plans
What can we learn from these definitions?

Records are recorded information that are a vital information or knowledge resource for your organisation

Are created or received in the course of a business activity and provide evidence of that business

Records document the transactions of business, whether it is personal or corporate business

Records are often created and kept because they are needed in order to conduct business, as evidence of past business, because they are required to meet legal obligations or because the community expects that they will be kept.

This evidence can sometimes be a safeguard against fraudulent and corrupt behaviour. They are a defence against concealment and deception.

Can be in any form

Records may be paper, any digital formats, or in other forms such as photographs, video footage, audio recording or microfilm.

In the case of databases, the record may not necessarily be the database itself. Data may be combined in various ways and used in a business transaction. The ‘record’ may then be what provides the evidence of that transaction e.g. a report from the system showing what has occurred.
In What Forms are State Records?

State records may be in any form, including:

- Paper, microfilm, electronic
- Documents, files, maps, plans, drawings, photographs
- Data from business systems, word-processed documents, spreadsheets, email, web pages
- Computer files on a floppy or hard disk
- Audio, video or optical media such as cassettes, video tapes, CDs and DVDs.

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- Computer files on a floppy or hard disk
- Audio, video or optical media such as cassettes, video tapes, CDs and DVDs.

Just to emphasise what was said earlier, records take many forms – and as technology changes, this list will continue to grow.
What types of Information are State Records

What Types of Information are State Records?

- Any data within a database or information system that documents business process or actions (business system)
- Agendas, papers and minutes
- Draft versions of documents that contain significant annotations or were submitted for approval or comment by others
- Records generated from a project or policy initiative
- A work related email that documents an action or decision
- Correspondence
- Information related to the business activity of the agency that has been published on an agency’s website

Examples of what are state records include:

- Any data within a database or information system that documents business process or actions
- Agendas, papers and minutes
- Draft versions of documents that contain significant annotations or were submitted for approval or comment by others
- Records generated from a project or policy initiative
- A work related email that documents an action or decision
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Many people are often surprised that drafts can be state records. Versions which were circulated for comment or approval show the process of arriving at a decision – so they are a record, as they provide evidence of an agency’s activities. It is important to note that non-circulated drafts (e.g. drafts containing minor grammatical corrections) are also state records, but can be destroyed according to DA2158 when reference to them ceases.

You may think that some things in this list are not very important, and it’s true that some meetings are more important than others, and some projects are more important than others. However, while how important something is may affect how long a record needs
to be kept for, it DOES NOT affect whether or not it is a state record. We will briefly look at the retention and disposal of records later in this session.

Some records are generated automatically if a system has been designed to do so, for example processing an online transaction. In other cases, we need to deliberately create a record, for example taking minutes of a meeting or a file note of a phone conversation.

Before moving to the next slide ask:

❓ Taking these things into consideration, how could this impact on your work, or what you do?

👩‍💻 Change the way we record information
👩‍💻 More care taken when creating and saving documents

⏰ 5 minutes

General discussion about what participants think about the impacts on them.

❓ What sort of information do you think would **not** be considered state records?

⏰ 5 minutes

General discussion
What types of information are not State Records

Examples of what is **not** considered to be a state record include:

- Advertising brochures from an external provider
- Informational material that includes lists of suppliers, catalogues, directories and addresses
- Unsolicited emails or letters advertising products or services
- An email about an afternoon tea for a work colleague who is leaving
- Press cuttings and other external media reports relating to the agency and its activities
- Project template

Activity – What is a state record?

10 minutes

Provide some examples of documents and ask participants to decide what is a State record and what isn’t.
Where you have your own examples, please add them in here, e.g. types of emails sent, documents received, etc.
2. Types of Records

Records created or received by an agency can be generally divided into three different types:

- **Business records**
- **Short-term value records**
- **Personal records**

All documents that you generate in the course of your work are records, they just have different values! These can be divided into three general types.

Note - you need to move away from calling records ‘documents’ as that is format specific.

**Business** that you generate in the course of your work, which related to the business of the department, your division or business unit. They are about the work you do and how you do it, the services and projects you deliver. They have to be saved and managed properly – you do not have the authority to discard/delete these. They are the you create and ones that are received from external sources (correspondence, from other agencies).

**Short term value** is used to facilitate departmental business which are trivial by nature and as such have short term value. These are ones that you may want to keep for a short time for business reasons, but they have no intrinsic value to the agency or the Tasmanian public (historical). Duplicates of documents sent to you by other business units fall into this category. It is the creator that is responsible for ensuring the original is saved for records, the copies are for you to use for business reasons, but not to keep on file.

**Personal**

Which do not relate to business.
Business Records are:

• prepared on behalf of the Agency
• Record the substantive activities and policies of the Agency
• required for use by others or affect the work of others
• Explain or justify what has been done
• Illustrate the extent of individuals /groups responsibility for decisions taken
• Illustrate the order of events and the Agency’s role
• Include business systems
Short Term Value Records:

- records that are used to facilitate activity but are of short-term value or of a trivial nature and do not support or contribute to the functions of the Agency
- Include records that are duplicated or held elsewhere in the Agency or have little administrative, fiscal, evidential, cultural or known historical value

Personal documents:

- for an individual employee which have no relevance to the business of the agency.
Source Records

The Disposal Schedule for Source Records
DA No. 2159

Provides a mechanism for the disposal of converted ‘source records’, that has been digitised or converted into another medium or format or migrated from one system to another.

source records –
documents or other records that have been copied converted or migrated, or will be the input for such a process.
A source record may be an original record or it may be a reproduction that was generated by an earlier copying, conversion or migration process.

The Disposal Schedule for Source Records (DA No. 2159) authorises the disposal of source records that have permanent status in a current disposal schedule and all source records that have temporary status in a current disposal schedule, and have been either copied, converted into another medium or format, or migrated from one system to another.

(Note - for any non-government attendees, DA2157, DA2158 and DA2159 are useful but not mandated.)

Schedule DA2159 has been recently reviewed and in particular the cut-off date of 1 January 2000 has been removed.

Please contact us if you are digitising pre 1960s records.
3 Legislative and Regulatory Context

In this section we are going to discuss **Key components of the broader Information Management legislative framework**

This includes:

- Legislation
- TAHO Guidelines
- Agencies policies

**Key components of the broader Information Management legislative framework**

**Legislation:**
• Archives Act 1983
• Personal Information Protection Act 2004
• Right to Information Act 2009
• Electronic Transactions Act 2000
• Evidence Act 2001

There are a number of legislative instruments that guide information management across public authorities in Tasmania:

**The Archives Act 1983**
A record means a document or an object that is, or has been, made or kept by reason of any information or matter that it contains or can be obtained from it or by reason of its connection with any event, person, circumstance, or thing

**The Right to Information Act 2009.**
The Right to Information Act 2009 (RTI Act) replaced the Freedom of Information Act on 1 July 2010. It created a new framework for the disclosure of information to the Tasmanian Community. The basis of the change is reflected in the title of the new Act. The Act mandates the PROACTIVE release of information. It is now seen that people have a RIGHT to information about the agencies they are dealing with.

The underlying principles is that the information held by Tasmanian Agencies of all kinds belongs to the people of the State, and has been collected for them and on their behalf.

It is interesting to note that information provided by ‘outsourcing providers’ is included in the scope of the Act.

**With an added emphasis on the Right of people to access government Information, good recordkeeping is essential.**

**Personal Information Protection Act 2004**
Legislation that provides appropriate safeguards for government agencies in collecting and handling individual’s personal information, creating statutory obligations and a right to make a privacy complaint. Applications for access to personal information under the legislative process are in most cases dealt with under the IP Act, with a similar process and decision making framework as the RTI Act. The IP Act also provides a process for people to seek an amendment of their personal information held by an agency.

The RTI Act repeals the Freedom of Information Act 1992. An application for access under the FOI Act is replaced by the legislative processes set out in the RTI and IP Acts.

Information about the RTI Act and the PIP Act is available on the Office of the egovernemnt website http://www.egovernment.tas.gov.au/
What does the Archives Act Require

In Tasmania, the making and keeping of state records is governed by The Archives Act 1983. The Act's purpose is to ensure that state records of Tasmania are made, managed, kept, and, if appropriate, preserved in a useable form for the benefit of current and future generations.

The Act contains a number of obligations for agencies which include those listed in the slide. Agencies are also required to have due regard to the Guidelines and Advice issued by the State Archivist.
Attributes of Records

Making Proper Records

Records must:

• Accurate
• Authentic
• Integrity – complete and unaltered
• Accessible
• Usable

A key attributes for employees of agencies are outlined in State Records Guideline No 1 Making Proper Records

Accurate, Authentic and Complete (Integrity)

Staff must create records of their activities, and ensure that systems which support business transactions create appropriate records – this recognises that some records are created automatically, and that some need to be deliberately created.

? Can anyone think of some examples of either created automatically or deliberately created.

Records capture is a deliberate action that results in the registration of a record into a system with recordkeeping functionality. These systems can be paper, electronic or mixed. It is not enough for a record just to be created – to get the benefit of a record, it must be captured in an appropriate system so that it can be managed over time and the right people can have access to it.

Adequate records meet the purposes for which they were created and/or kept. Records that document more important or higher risk transactions or processes need to be more detailed than records which document low risk activities. This characteristic of a record recognises that, as we mentioned earlier, some work and therefore some records, are more important than others. For more important activities, records need to be more detailed.

Complete records comprise contextual and structural data as well as content. Contextual data is information about the creation and use of the record, including the business
processes that give rise to it. Structural data includes formal internal structures of the information object and the structural relations between records. Content is the information contained within the information object.

**Other qualities of records**

Meaningful records may be understood in the context of the processes and business for which they are created and in which they are used.

An accurate record reflects what was communicated, decided or done (or not done). That is, the record’s content, context and structure can be trusted as a true and accurate representation of the transactions, activities or facts that they document and can be depended upon in the course of subsequent use.

An authentic record is a record that can be proven and trusted to be what it purports to be and to have been created, used, transmitted or held by the person to whom these actions have been attributed.

Inviolate records are time-bound (that is they are fixed at a point in time) and complete. To be inviolate, a record must be securely maintained to prevent alteration and unauthorised removal.

**Accessible and Usable**

Accessible records are records that can be identified, located and viewed as required.

Useable records are those that may be viewed and are fully functional and re-useable. If the user cannot view and/or use the record (for example, if the hyperlinks did not work), then the record is not ‘useable’.

Records retention describes the act of keeping of records for as long as they have administrative, business, legislative and cultural value. Records must be retained in accordance with Retention and Disposal Schedules approved by TAHO

Preservation involves storing, protecting and maintaining records over time.
Other legislation that may relate to your agency:

- Electronic Transactions Act 2000
- Evidence Act 2001
- Limitations Act 1974
- Financial Management & Audit Act 1990
- Crimes Act 1924
- State Service Act 2000
- Local Government 1993

**Limitations Act**

Sets out time periods in which legal action can be taken. The Act imposes a number of limitations on specific types of actions. Generally actions shall not be brought after the expiration of 6 years from the date on which the cause of action accrued. (Explain the concept of legal competence which can affect the limitation, especially for minors.)

Records that may be the subject of legal action need to be retained for an additional year to allow for court processes – which is why you frequently see 7 year retention periods. (Supreme Court Civil Procedure Act 1932.)

**Financial Management and Audit Act** – Accounting and Auditing requirements.

**Crimes Act** - Criminal activity including fraud

**State Service Act** – Human Resources Management for government agencies (not for Councils)

**Local Government Act** – Council records
 Agencies are required to have due regard to the Guidelines and Advice issued by the State Archivist. Formal Guidelines are issued by the State Archivist. It is legislated that all agencies must take reasonable steps to comply with these Guidelines. In addition to these formal guidelines, Recordkeeping Advices are issued by the State Archivist and these provide advice on the management of records and support or explain recordkeeping requirements set out in formal Guidelines or the Act. These are available on the LINC Tasmania website.


Select a few, mainly the recent ones (including recently revised) to highlight.
Whole of Government Information Management Policy

Information Security Policy

- Provide Agencies with a consistent approach to managing information security risks across Government
- Applies to Tasmanian Government agencies as custodians of information on behalf of the Crown.

Information Security Policy Manual

- Outlines procedures to assist agencies to implement appropriate information security governance and management procedures in accordance with the Tasmanian Government Information Security Policy.
- Contains mandatory and recommended statements that apply to Tasmanian Government agencies.

The Tasmanian Government Information Security Framework sets out the Tasmanian Government’s approach to managing information security. The Framework is based on a risk management approach and requires agencies to implement policies and procedures that are proportionate to the level of risk.

Agencies have a responsibility to maintain appropriate record security arrangements and enable secure access to records. Agencies as custodians of information owned by other entities have an obligation to identify and respect the information security procedures required by those entities.

Does this relate to your agency? Discuss

These procedures have been developed to be consistent with the Archives Act 1983 and guidelines and advices issued under the Act. The State Archivist has endorsed AS ISO 15489 as a model for best practice record-keeping in Tasmanian state and local government organisations.

Record security guidelines apply to all records, whether paper-based or electronic, and include information held in databases.


Your agency should have a project to implement information security policy see your records manager or director of corporate services for more information.
Security Classification of Records


It also provides a standard process to allow agencies to evaluate their information assets and determine the appropriate level of security classification that must be applied, addressing the need for a consistent approach to dealing with the sensitivity and confidentiality of information assets across the Tasmanian Government.

By providing a standard approach to information asset security classification, the procedure facilitates improved interoperability and consistency across and within Tasmanian Government agencies.

The implementation of electronic service delivery has accelerated the need for a consistent approach to security classification, particularly as agencies seek to integrate services and information.

These procedures include a standard set of classification definitions, markings and procedures for providing appropriate access to information assets. Security classification is useful to reduce the risk associated with transfer of information between Tasmanian Government agencies or to external organisations.

Five information security classification levels are defined in the procedures:

PUBLIC, UNCLASSIFIED, X-IN-CONFIDENCE, PROTECTED and HIGHLY PROTECTED.

This classification does not displace other business or security classifications and can operate in parallel with other classifications, for example the National Security
Classification. It is independent and separate from assessments that may be required under legislation, for example the Right to Information Act 2009.

Each Agency is to also consider legislation and policy relevant to its business or activities that could impact on information security classification.

Your agency will be working towards implementing information security see your records manager or director of corporate services for more information.
Agencies Policies on Information Management

Your Agency must have its own suite of Information Management policies including a Records Management Policy.

Your agency must have its own suite of Information management polices including a Records Management policy

You need to read and familiarise yourself with the obligations set out in these policies
## Recordkeeping Policy Framework

**What is the Recordkeeping Policy Framework**

<table>
<thead>
<tr>
<th>Legislation</th>
<th>Archives Act 1983</th>
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<tbody>
<tr>
<td>Agencies Policies</td>
<td>Agency Information Management Policy, Agency Information Security Policy, Agency Risk Management Policy</td>
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**How it all fits together legislation, WOG policy, standards agency policy**

The Archives Act 1983 establishes TAHO as the standard setter for recordkeeping across Tasmanian Government Agencies. As a result, TAHO has developed a range of Guidelines, and advice to help ensure state records are created and managed. This slide provides a snapshot of some of this advice.

Most of the advice is developed for the records and information professionals in Agencies, who implement recordkeeping systems and processes in accordance with the Guidelines.

So while you don’t need to know the details of these, it is good to know that how we do recordkeeping is in accordance with a Government-wide policy framework, and that minimum recordkeeping requirements are prescribed by law.

If you are interested in seeing more on this, all these and other guidelines and advice are available on LINC Tasmania website.

4. Why Undertake Recordkeeping?

We need to create, manage and keep records to comply with the Archives Act 1983 but of course there is a reason behind every piece of legislation.

**Before going to slides ‘Why Manage Information?’…**

**Why do you think that recordkeeping is important enough to have laws around it?**

The reason recordkeeping is important enough to have laws around it is that:

- State records provide evidence of actions, decisions and communications – so we know what was done, why and how (records also sometimes help us avoid ‘re-inventing the wheel’).
- State records are the foundation of government accountability. They show how government funds were spent, how decisions were made – for example, why one application was approved and another denied.
- Good recordkeeping supports effective and efficient management of government business and service delivery.
- State records are the corporate memory of government.

Perhaps most importantly, and most fundamentally, records protect the rights and entitlements of citizens – think of medical records, adoption records, land title records, drivers licence records, criminal records. Our civil society is built on and based on evidence provided by records.

**Before showing the next slide, ask**

**How does good recordkeeping help me?**
How Does Recordkeeping Help Me?

Recordkeeping:
• provides evidence of your business activity
• helps you to do your job more efficiently
• helps you to make more informed business decisions
• enables you to meet legislative obligations
• enables access to corporate information
• protects the interests of the Government and your agency

In addition to the broader benefits, there are individual benefits. Quite simply, records show that you have done what you are supposed to do, in the way that you are supposed to do it.
Benefits of using an EDRMS

An Electronic Document and Records Management System:

- Increases the capture of information
- Improved access to information
- Allows sharing of information
- Improves compliance with Records Management requirements
5. Roles and Responsibilities

30 Minutes

Before moving to the next slide ask:

 عشر Does anyone here think they don’t have recordkeeping responsibilities?

Why?

Do I have recordkeeping responsibilities?

All Tasmanian Government Employees have Recordkeeping responsibilities to make and keep records of their activities. This includes contract staff and consultants working for government.

Responsibilities outlined in:

- Tasmanian State Service Code of Conduct (S9)
- Archives Act Tasmania 1983 (S10)
- Other legislation that applies to your agencies (Forensic Procedures Act 2000)

Recordkeeping is not just the responsibility of records managers and other information professionals. While they have an important role to play, every employee has some recordkeeping responsibilities.

Primarily, YOU are responsible for ensuring that records of your work are created. Let’s look at this in a bit more detail.
What Are My Recordkeeping Responsibilities?

Your recordkeeping responsibilities include:

• Creating records of your business activities and decisions. Sometimes this might just be using the correct system, or it might mean deliberately creating a record, such as minutes of a meeting.

• Making sure the records you create are adequate – that is meet the purposes for which they were created and/or kept. Records that document more important or higher risk transactions or processes need to be more detailed than records which document low risk activities. Remember also that other people may need to refer to them in the future, so they should be clear and understandable for others.

• Making sure the records you create are accurate and reflect what was communicated, decided or done.

• Manage public records by placing them into the corporate recordkeeping system or business system.

• Putting records into the corporate recordkeeping system, including records you receive from external people in the course of your work.

• Maintaining records in line with your agency’s information management policies.
What are my recordkeeping responsibilities?

You must not:

• Destroy, delete or alter records without authority.
• Remove records without permission.
• Lose records that are in your care.
• Provide inappropriate access to restricted records.

You also have a responsibility to not:

• Destroy, delete or alter records without authority.
• Remove records without permission.
• Lose records that are in your care.
• Provide inappropriate access to restricted records.
You should make a record of your business activity.

For example, create records of:

- Meetings where business decisions are made including an agenda, minutes and meeting papers.
- Internal or external correspondence you send or receive that involve the provision of advice, instructions, decisions, approvals or recommendations.
- Work related verbal communications that involves the provision of advice, instructions, decisions, approvals or recommendations. This includes phone calls, voice mail messages and conversations with your supervisor/manager.
What sort of information do I need to record?

Information that provides evidence of the business activity, for example:

- Date of the discussion or business activity
- Details of your name and other involved stakeholders
- Key discussion points
- Details of instructions or advice provided
- Approvals, decisions and recommendations made

Read through the slide or ask participants to read through the slide.

Where should I keep records?

Records should be captured into recordkeeping systems

Recordkeeping systems are not:

- Your private store
- Disks
- Email systems
- Personal or shared drives

Recordkeeping systems:

- Make records easily accessible
- Ensure records are appropriately managed
- Ensure records are disposed of in accordance with an authorised Retention and Disposal Schedule

Your agency should have a recordkeeping system and records should be captured into this system.

The following are NOT considered to be recordkeeping systems:

- Your private store
- Disks
- Email systems
- Personal or shared drives

This makes it easier for everyone, including you, to find and locate records in the future.

It also helps to ensure records are lawfully disposed of in line with an authorised Retention and Disposal Schedule.
How long do records need to be kept?

Minimum retention periods for records are authorised by the State Archivist through:

- General Retention & Disposal Schedule for Administrative Records
- Agency or sector specific Retention & Disposal Schedules.

Permission to dispose of public records is given through Retention and Disposal Schedules that have been authorised by the State Archivist.

These include the General Retention and Disposal Schedule for Administrative Records which applies to all agencies, and agency or sector-specific schedules.

Your Agency should have a schedule which will outline the authorised retention periods for your agency’s records.

These retention periods list the minimum requirements. Records will still need to be assessed for any on-going business or legal use beyond this minimum retention period, before they are disposed of.

There are also requirements to ensure the disposal of records is appropriately documented. In most agencies, disposal is coordinated through records management specialists in accordance with set procedures to ensure appropriate authorisation.

Just because a record’s retention period is up, does not mean you can just throw it in the bin or hit delete.

We will look at this in the next section of the training recordkeeping tools.
Can I delete or dispose of records?

Once a public record has been placed into your recordkeeping system, the management of this system will enable disposal to be undertaken in line with a Retention and Disposal Schedule that has been approved by the State Archivist.

Once you have placed the record into your corporate recordkeeping system, you may delete or dispose of any copies of the record you may have*.

*Note: there are specific requirements regarding the disposal of original paper records after digitisation – see your Records Manager for further information.

Activity - Case studies

10 minutes

Use either the following recordkeeping scenario or case study to start a discussion about the importance of recordkeeping.

Read out the chosen scenario or hand out copies to each group for discussion.

RECORDKEEPING SCENARIO
Natural disaster struck a major city and thousands of inhabitants were forced to flee at short notice, many without the opportunity to gather personal documents.
For example, evacuees who used medication daily, unable to return to their homes for several days, needed to obtain supplies of their regular medication. However, some evacuees were unable to recall the names of medications they had been taking and many were uncertain of the dosages they had been prescribed. There were other time critical records they could not access.

What documents does your agency hold which affect peoples’ lives?

If you couldn’t readily find these documents for the public, what would the effects be?

Highlights the importance of records being captured
Highlights the importance of having accurate records
Highlights the importance of records being complete
Highlights the importance of records being accessible
In Summary - Recordkeeping Responsibilities

All employees are responsible for:
- Keeping good records of the information produced, received or acquired
- Making records to support what they do
- Keeping the records in their Agencies EDRMS

Employees must not:
- Destroy, delete or alter records without permission
- Remove business information from the agency without permission

All Directors and Managers are responsible for:
- Maintaining records relating to the activity of their business unit
- Ensuring all new subject matters have a file created in the agencies’ recordkeeping system

Agency Responsibilities:
- Records Management Policies
- Recordkeeping Systems
- Recordkeeping Review

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Agency Responsibilities:
- Records Management Policies
- Recordkeeping Systems
- Recordkeeping Review
Disclosure of Information

Employees must only access information that they require for legitimate work purposes.

Employees who inappropriately read, access or discuss information may not only be breaching the privacy and personal integrity of their colleagues, but also their obligations according to their Instrument of Appointment and any other Code of Conduct that is applicable.
6 Recordkeeping process and records management tools

In essence, records management is about ensuring that business activity is appropriately documented and managed. This includes involvement in the design and implementation of all the associated systems, procedures and services.

Tools include:

• Business Classification Scheme (BCS)
• Retention and Disposal Schedule
• Thesaurus

(Optional) CLASSIFICATION EXERCISE - Get group to come up with a file title for an actual piece of correspondence (suggestion - choose one from your own agency) – note, there will probably be various answers. At this stage that is fine and will help illustrate the points to follow. This works best if you have access to a Thesaurus for the follow up exercise (see p.52)
A **thesaurus** is a controlled list of terms linked together by hierarchical relationships. The thesaurus acts as a guide to allocating classification terms to individual records. In a thesaurus the meaning of the term is specified and hierarchical relationships to other terms are shown.

A thesaurus provides sufficient entry points to allow users to navigate from terms that are not to be used to the preferred terminology.

A thesaurus is used as the basis for the development of the Agencies BCS and then disposal schedule to enable automation of other records management processes.

(sentencing records at creation etc.)

The State Archivist has endorsed *Keyword AAA* as the standard general administrative thesaurus for use in Tasmanian government agencies. The *Keyword AAA* Thesaurus is a thesaurus of general terms designed for use in classifying, titling and indexing most types of records in most technological environments.

*Keyword AAA* cover terminology common to business functions and activities in most organisations and should be used in conjunction with a thesaurus of functional terms, relating to the organisation’s specific or core business functions, to provide comprehensive controlled vocabulary coverage. *Keyword AAA* is based on the business classification scheme advocated in The Australian Standard ISO15489.
State Records NSW also have a keyword thesaurus for Councils called ‘Keywords for Councils’ which is starting to be used by Tasmanian councils. The Council Retention & Disposal Schedule, DA2200, is based on ‘Keyword for Councils’.

Finally, I just want to mention to you briefly, the types of keyword thesauri available for records.

**Administrative.** In an administrative thesaurus terms are applicable across a wide scope of administrative areas. For example, *Keyword AAA* is a general administrative thesaurus that has been developed for the NSW government and contains terms that are common to all government agencies like Personnel and Accounting.

**Functional.** These contain terms that are applicable to only a few organisations. For example, in the Archives Authority’s *Functional Thesaurus*, a term is Government Recordkeeping Regulation, which is the function of developing, implementing and regulating recordkeeping in NSW government agencies. It is not likely that there would be many organisations with that sort of function!

**Merged.** The third type of thesaurus is a merged thesaurus which is the administrative thesaurus merged with the functional. Basically, you cannot just have an administrative or a functional thesaurus in place. You actually need a merged one to cover all of your records.
Recordkeeping tools – Thesaurus

File titling using Keyword AAA Thesaurus

FUNCTIONAL KEYWORD - ACTIVITY DESCRIPTOR - Subject Descriptor

Example -
FLEET MANAGEMENT - ACCIDENTS - Accident Report Forms

Thesaurus is structured similar to a BCS Function= keywords/Activity/subject/Records
Title

In a thesaurus the function is represented by a Keyword which is a group of activities that together support one aspect of furthering the mission of the agency.

In the thesaurus the activities are called Activity Descriptors which reflect the activities performed within the function that is represented by the keyword.

In the thesaurus the transactions are represented by subject descriptors that further define the transaction or the subject content of the activity.

With functional classification the basic approach is to have a three tiered title:

1. Keyword
2. followed by an Activity descriptor
3. followed by a subject descriptor.

My personal preference is to use FAT Function/Activity/Transaction, as people will remember FAT

There are a couple of variations to this structure, which we will explain a little later.

The title on this slide is also showing that hierarchy - from the broad to the specific. FLEET MANAGEMENT is broader than ACCIDENTS, isn’t it?
Each of these levels - keyword, activity descriptor and subject descriptor - can be used as indexing terms and are therefore access points for retrieval.

This is a good point where you can refer participants to a Thesaurus (if you have copies available)

When you are using the thesaurus you will see that it allows you entry points at a variety of these levels and indicates where they appear in the hierarchy so you can navigate easily. You can move either up the hierarchy to the broader terms or down the hierarchy to the narrower terms.

We use the standard terms Broader Term (BT) and Narrower Term (NT).

[show these points on the board using the last example]

With a broader term you need to go up one level in the hierarchy to the broader concept. So with this example, the broader term of Accident Report Forms is what? Accidents. The broader term of ACCIDENTS is what? FLEET MANAGEMENT.

With a narrower term it is just the opposite. So what would be the narrower term of ACCIDENTS? Accident Report Forms. And the narrower term of FLEET MANAGEMENT? ACCIDENTS.

It is because you can see the hierarchy in the record title, you know the linkages between individual records. For example, when looking at Accident Report Forms you can tell from the record title that the reason these forms are collected is because they document ACCIDENTS. Managing accidents is realistically a part of the function of FLEET MANAGEMENT whether we like it or not!.

Accidents may also form part of other functions. Can you think of an example? OCCUPATIONAL HEALTH and SAFETY. Often one activity may relate to several functions and you will see that as we do the exercises later.

All of the files on FLEET MANAGEMENT will therefore cumulate to provide a continuous record of that business activity, and all the files in the organisation will cumulate to document all of its activities and functions.

(OPTIONAL) CLASSIFICATION EXERCISE – using the same piece of correspondence as in the earlier classification exercise, ask the group to now classify it with a file title using Keyword for Councils (for Council participants) and the Keyword AAA Thesaurus (for non-Council participants). Then discuss the benefits arising from using a Thesaurus.
Records management tools - BCS

Business Classification Scheme (BCS)

- Classification is ‘Systematic identification and arrangement of business activities and/or records into categories according to logically structured conventions, methods and procedural rules represented in a classification systems’ (AS ISO 15489)
- The BCS is based on the agency’s functions and activities
- Functions and activities are more stable that administrative structure and usually survive either an agency or government restructure

Classification is ‘Systematic identification and arrangement of business activities and/or records into categories according to logically structured conventions, methods and procedural rules represented in a classification systems’ (AS ISO 15489)

Classification is based on the ‘business activity generating the records not the subject of the records.

The business Classification scheme is based on the functions and activities

Functions and activities are more stable that administrative structure and usually survive either an agency or government restructure – this is why we avoid using a subject classification.

The use of functions and activities in file titling and in disposal schedules is accepted best practice records management that is embodied in the Australian Standard for Records management ISO 15489 (based on the international standard ISO 15489)

Most government agencies have implemented these types of business or functional classification schemes.

BCS is used for:

- terms used for records titling (sometimes called a Thesaurus of terms)
- Agency Records Naming Conventions or Policy
- Development of a Disposal Schedule
We are all used to subject classification. For example we all are familiar with the classified advertisements in newspapers and library classification systems that we have been exposed to since our first visit to the library in primary school. With business classification we have to change our thinking – records are classified according to the business activity they document.
Records Management Tools - Retention and Disposal Schedule

A Retention and Disposal Schedule identifies and describes:

- **Disposal classes** – groups of records which have the same function
- **Status** – permanent or temporary retention
- **Disposal action** – date for transfer or destruction


A Retention and Disposal Schedule identifies and describes:

- **Disposal classes** – groups of records which have the same function
- **Status** – permanent or temporary retention
- **Disposal action** – date for transfer or destruction

The Archives Act 1983 stipulates that State and local government organisations or Agencies, must not dispose of record of any type or format (a definable piece of information) without the written approval of the State Archivist.

Disposal of records involves their destruction, their removal from the custody of the creating Agency, or their transfer to TAHO.

An authorised disposal schedule is one of the formal approval instruments issued under the provisions of the Act for records disposal. ‘scheduled records’ are those records covered by such a disposal schedule authorised by the State Archivist.
Recordkeeping Processes

The operational functions of records management include:

• Capture
• Access
• Appraisal and Disposal
• Control
• Maintenance

These processes are listed as if in a sequence, but in many EDRMS, these processes may take place simultaneously or in a different order.

Many people believe records management equates to filing and processing paper records. This is not an adequate description for modern records management.

The international standard on records management ISO 15489 defines it as:

‘the discipline and organisational function of managing records to meet operational business needs, accountability requirements and community expectations’

Records management is about...

• Managing records from the time they are created, for as long as they are required
• Designing and managing systems to ensure that records are authentic and reliable
• Providing a service to meet the needs and protect the interests of the organisation, its staff and its clients
• Capturing complete, accurate, reliable and usable documentation to meet accountability requirements
• Managing records as an asset and information resource
In essence, records management is about ensuring that business activity is appropriately documented and management. This includes involvement in the design and implementation of all associates systems, procedures and services.
Recordkeeping Processes - Capture

Records Management Processes - Records Capture

Records Capture involves:
• Working with records creators to make sure that they understand the need to create records in relation to the work they do
• Determining what records, in the form, need to be captured and when

Capture

Working with records creators to make sure that they understand the need to create records in relation to the work they do

Determining what records, in what form, need to be captured and when

Includes both records made and received by the organisation.

State Records Guideline No 1

Business Records must be captured into the agency’s recording systems.

Electronic recordkeeping systems capture documents in a more deliberate process which is basically the same as registration. Often documents in electronic recordkeeping systems are aggregated into virtual files to provide similar linkages as provided in the paper-based files.

Systems that capture records also need to capture metadata (data describing context, content and structure of records and their management through time) associated with the record to:

• Describe the record (what is contains and the context of the business taking place)
• Enable the record to be a representation of an action
• Enable the record to be retrieved
Recordkeeping Processes - Control

Records Control

Definition - applying physical and intellectual control to records once they have been created to ensure that they can be found, retrieved and used.

Control activities can include:
- Registration
- Classification
- Titling using a thesaurus and
- Indexing

Control

Applying physical and intellectual control to records once they have been created to ensure that they can be found, retrieved and used.

Control activities can include registration, classification, titling using a thesaurus and indexing
Records Registration

Registration should include the following metadata as a minimum:

- A unique identifier
- The date and time of registration
- The title or abbreviated description
- The author (person or organisation), sender or recipient

Registration

The purpose of registration is to provide evidence that a record has been created or captured in a recordkeeping system and an additional benefit is that it facilitates retrieval. It involves recording brief descriptive information about the record in a register, and assigning the record a unique identifier.

In a paper-based system a register is normally a separate record and can be a hard-copy or a computerised register. (a lot of records management systems are computerised registers for the paper-based recordkeeping system)

Electronic recordkeeping systems can be designed to register records automatically. Even when registration is not automated, elements of the registration process (metadata) can be automatically derived from the business environment from which the record originates.

Registration should capture as a minimum the following metadata:

- a unique identifier
- the date and time of registration
- the title or abbreviated description
- the author (person or organisation), sender or recipient

In records business systems or EDRMS registration is called ‘profiling’

We discussed classification earlier
Records Maintenance

Ensuring records are protected, preserved and managed for as long as they are required

Activities include:
• Establishing suitable storage conditions
• Conservation
• Data and migration management
• Disaster preparedness
• Identification of and maintenance of vital records

Maintenance involves:

Ensuring records are protected, preserved and managed for as long as they are required

Activities include:
• Establishing suitable storage conditions
• Conservation
• Data and migration management
• Disaster preparedness
• Identification of and maintenance of vital records
Section 10 of the *Archives Act 1983*, requires agencies to preserve State records until they are transferred or destroyed.

State Records Guideline No. 11 provides information for agencies to ensure:

- records are stored in the most cost-effective manner possible
- records are protected, secure and accessible for as long as they are required
- permanent value records are stored in the best possible conditions
- State Records Guideline No. 11 Physical Storage of State Records

Records should be stored on media that ensure their useability, reliability, authenticity and preservation for as long as they are needed. Issues relating to storage and handling apply to current records not just those that have become inactive.

Storage conditions and handling process must take into account the specific physical properties of the records.

Irrespective of format, records of continuing value, require higher quality storage and handling to ensure they are preserved for as long as they are needed.

Electronic recordkeeping systems should be designed to ensure that records will remain accessible, authentic, reliable and useable through any kind of system change. This may require migration to different software or conversion to other formats.
Records Appraisal and Disposal

**Appraisal and Disposal involves:**

- Establishing and maintaining a retention and disposal program including:
  - Determining the value of the organisation's functions and activities
  - Compiling retention and disposal schedules based on this appraisal
  - Sentencing records using those schedules
  - Destroying time expired records
  - Transferring records as State Archives or to other agencies as required

We will now briefly cover the retention and disposal of records. TAHO run a full-day training course which aims to give participants the knowledge and skills to undertake disposal. This is just an overview of the process.

Most people use the term “disposal” in the context of getting rid of something (destruction). In records jargon and more particularly in the Archives Act – the term disposal means more than just destruction. In this context the term disposal means transfer of custody, transfer of ownership or destruction.

**TRANSFER** - usually means transfer of custody of the records to the TAHO.

**DESTRUCTION**  More than 90% of an agency’s records can be destroyed within 2 - 7 years of their creation (subject to formal approval by the State Archivist).

You must have the approval of the State Archivist before you can destroy any records.

There are two ways of getting authority to destroy State records, developing an agency records Disposal Schedule or applying for a One-off destruction authority. This is for records not covered by a disposal schedule therefore you have to identify the records to the TAHO and justify your recommendations.

See LINC Tasmania website for Guidelines and Advice on Retention and disposal, Particularly State Records Guideline No. 2, Recordkeeping Advice No.9 and 10.
Records Disposal Schedules are continuing authority which list records by type, identify the appropriate disposal actions for each class of records and are formally authorized by the state archivist.

Destruction Authorities are approval of one off lists authorizing disposal of otherwise unscheduled records.

2 types of disposal schedules agency specific schedules and general schedules applying to all agencies:

- Agency disposal schedules provide for the ongoing disposal of functional records created by a specific agency.
- General disposal schedules applicable to all agencies

Processes of Appraisal and Disposal involves:

Establishing and maintaining a retention and disposal program Including:

- Determining the value of the organisations functions and activities
- Compiling retention and disposal schedules based on this appraisal
- Sentencing records using those schedules
- Destroying time expired records
- Transferring records as state archives or to other agencies as required

DISPOSAL EXERCISE - Sentence a list of types of records using DA2157 and DA2158 (for non-Councils) and DA2200 and DA2158 (for Councils). The list of types of records (suggest 6-7 examples) can be selected by you from your own agency’s records, or you can contact TAHO at GRK@education.tas.gov.au for a list.
Managing Access

Managing access involves:
Making records accessible and usable to users within and outside the organisation

Activities may include:
• Providing a reference service
• Ensuring only authorised access to records is provided
• Setting appropriate access restrictions for records once they are transferred to TAHO.

Some considerations when deciding on access restrictions include:

1. Have similar records be transferred before (by your own or another agency) and what are their access restrictions?

2. Will the information in these records be available from other sources, and when?

3. Are these public records and so need to be made immediately accessible? (eg. annual reports)
7 What are Archives

15 Minutes

7. What are Archives?

- Archives are simply records that are appraised as having continuing value - i.e. they need to be kept permanently
- Like records they can be in any format
- Archives may have continuing value because they meet an ongoing legal or evidential requirement or because they meet a research need for the organisation or the community

The popular notation of archives is of dusty, mouldy, cobwebbed paper records stored in a basement and supervised by an elderly archivist who looks cobwebbed too!

These stereotypes are usually far form correct!

Archives are simply records that are appraised as having continuing value - i.e. they need to be kept permanently

- Like records they can be in any format
- Archives may have continuing value because they meet an ongoing legal or evidential requirement or because they meet a research need for the organisation or the community
- Generally only a small percentage of records are retained as archives

Why Keep Archives

- ‘long term memory’ enabling better quality planning, decision making and action, access to past experience, expertise and knowledge, and a historical perspective
- Evidence of continuing rights entitlements and obligations
- Instruments of power, legitimacy and accountability facilitating social interaction and cohesion
- A source for understanding and identifying ourselves, our organisations and our society
- A vehicle for communicating political, social and cultural values.

Demonstrate the TAHO website and the records that are available
8.Key Things to Remember

5 Minutes

You should consider:
• Was this activity undertaken in the course of conducting business?
• Has this activity resulted in a business decision being made?
• Has this activity resulted in a business action being undertaken or advice given?
• Did I write and send this information for my work?
• Is the correspondence I have received from an external source of direct relation to my business activities?

If you answer yes to any of these questions, you will need to create a record.

Don’t Forget
• Disposal of state records without authorisation from the State Archivist is unlawful.
• Make sure public records are placed into your agency’s recordkeeping system so that they can be managed and disposed of lawfully

Want to know more?
• Talk to your Records Manager (insert details)
• Visit your agency’s intranet site (insert details)
• Visit www.linc.tas.gov.au
• Contact TAHO on (03) 6233 7232 or GRK@education.tas.gov.au

Read through the slide and ask participants to pre-empt the answers
Course Complete

Course Completed!

Questions

GRK@education.tas.gov.au