

# Glossary of Records Management Terms

Active record:	A record referenced often in the conduct of current departmental business.
Administration record:	Records documenting the day to day operation and administration of an office (e.g. legal, financial, budget, personnel and other common operations).
Archives:	An area used for the permanent storage of valuable records and documents.
Back-file conversion:	The process of scanning in, indexing and storing large backlog of documents on an imaging system.
Case file:	Record groupings that pertain to a specific action, event, person, place, thing, organisation, location, programme or project. Include personnel, project and transaction files.
Chronological Files:	Files arranged in date order.
Chronological Filing:	Filing in date sequence.
Classification:	The process of assigning a file series to a document.
Closed File:	A file folder in which documents should not be added.
Current Files Area:	The area in which frequently used records are maintained.
Cut-Off:	The time at which all new (Active) material is placed in a new set of folders and the previous folders (Inactive) are removed from the current files area and transferred to a storage area, records centre or archives. The cut-off date varies with the record type and departmental procedures.
Disposal:	The final removal, whether for destruction or transfer to another records centre or archives, of records that have reached the end of their retention period.
Disposition:	The action taken, regarding records no longer needed for current business, which may include changing the location or physical format of the records. Action may include shredding or recycling, digitalising, microfilming, duplication, or transferring to records centre or archives.
Duplicate File:	A photocopy of official record created for easy reference that is not located in the Office of Record.
Eye-readable:	A record that can be read by the naked eye, without the aid of hardware or software (e.g. paper or microfilm/fiche is considered eye-readable although it must be magnified to be read).
File Series:	A set of documents all having the same subject e.g. invoices, purchase orders, resumes, job descriptions, and meeting minutes are all different series of documents.
Format:	The physical form, in which material appears – books, slides, photographs, film recordings.

Inactive record:	A record no longer needed in the conduct of current business.
Input:	In electronic records, data to be entered into a computer for processing.
Input records:	Non electronic documents are used to create, update or modify records in an electronic medium or electronic records containing data used to update a separate computer file, sometimes called source records or source documents.
Journal:	In accounting, a (book) register of daily transactions that are posted to general ledger (e.g. payroll, sales etc.).
Life Cycle of Records:	Records managements three stages of a record: creation, maintenance and use, and disposition.
Machine-readable:	Records that must be read by using hardware and/or software.
Medium (Media):	The physical makeup of recorded information (e.g. paper, film, discs etc.).
Microform:	An arrangement of images reduced in size, as on microfilm or microfiche.
Non-current record:	A record no longer required for the day-to-day conduct of an active business.
Non-record:	Materials excluded from the legal definition of (public) record (e.g. copies of documents kept only for convenience of reference, extra copies of printed records or publications and materials intended solely for reference or exhibition.
Off-site Storage:	A facility other than the normal place of business where records are stored for protection.
Office of Record:	The office that maintains an 'official record' copy of a document, in support of government business, as opposed to a duplicate.
Out Card:	Card inserted in place of a file that has been removed from its place of storage/file cabinet for access. The out card should identify the records, the date taken and the person taking them.
Output:	Information transmitted from internal to external units of a computer or to an outside medium.
Output Records:	Information generated by a computer and placed on an outside medium such as paper, microform or an electronic storage medium.
Pending File:	Correspondence, reference and similar materials, filed in chronological order and generally used for reference and convenience.
Permanent Record:	A record which has a permanent or lasting administrative, legal, fiscal, research or historical value and therefore must be retained and preserved indefinitely.
Records Inventory:	A survey to determine the size, scope and intricacy of the department's records. It should include the record series, inclusive dates, types of records, quality, arrangement and description.

Records Manager:	The person assigned primary responsibility for the records management program.
Records Retention Schedule:	Instructions for what to do with public records (based on administrative need and legal requirements) from their creation, through active and inactive use, to their destruction or retirement. The schedule provides a minimum period of time that a specific type of record must be preserved.
Retention period:	The period of time during which records must be kept before they are either destroyed or stored in an archival area.
Retrieval:	Locating and pulling records for use.
Scanner:	A device that optically scans a human readable image and converts the image to machine readable code, with applicable software.
Scheduled Records:	Records for which there is an official records retention schedule.
Subject Files:	Records arranged and filed according to their general informational, or subject, content. Mainly letters and memorandums but also forms, reports and other material, all relating to programme and administrative functions, not to specific cases (also known as correspondence files).
Transfer:	The process of moving records from one location to another e.g. from office space to storage facility, records centre or archives.
Vital (Essential) Records:	Records containing essential information, necessary for the recommencement of operations after a disaster, the reinstatement of the legal and financial status of the organisation and to fulfil obligations to the organisation, its employees and to outside parties.
Working Copies/ Files(Reference Only Copies):	Documents with short –term or transitory use and used as reference only. May include rough notes, calculations or drafts used to prepare or analyse other documents. Working copies are documents that have no administrative, operational, financial, legal or historic value.