

# Records Management For Dummies

By Richardson



## Records Management For Dummies By Richardson


### Here's what you should know to manage data records efficiently

With proper electronic data management, your business can lower costs, improve efficiency, eliminate duplication, and be protected in the event of a lawsuit. This book provides an overview of records management solutions and implementation strategies in plain, non-technical English. Step-by-step instructions show you how to begin managing records and information and how to maintain the program once you have it established. Sample forms for inventory, scheduling, and necessary documentation are also available on the companion website.

- Electronic records management offers cost savings, greater efficiency, and protection in case of legal action; this book gets you started on an effective data management system
- This plain-English guide helps you determine what constitutes a record, shows you how to inventory records and create an efficient way to file both electronic and paper copies, and explains how to create a retention schedule
- Walks you through switching to electronic record-keeping, what to look for in a records management system, implementing best practices, ensuring that your system will stay current, and using the system effectively
- Helps you assure that the destruction of any sensitive information is conducted and documented correctly

*Records Management For Dummies* helps your business save money and improve efficiency with effective electronic records management.

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### Editorial Review

From the Back Cover

Know what to keep, how to set up a system, and what your plan should contain

If you're involved with a business — any business — you're acquainted with records and record-keeping. If you have your own business, you may be wondering what you need to keep and where on earth you're going to keep it. Well, help is here! Blake Richardson answers all those questions and helps you implement a tried-and-true records management system.

- Order out of chaos — see how an information management program can benefit your organization and find options for inventorying records
- Rank and file — explore different filing systems and methods, find one that meets your needs, and develop a plan
- What and why — learn what you need to keep and how proper records management can protect your business in case of a lawsuit
- When it's time to let go — ensure that files are properly destroyed when they should be
- Super software — compare software options for managing records, documents, and enterprise content, and discover e-Discovery

Open the book and find:

- Tips on managing the information life cycle
- The scoop on retention scheduling
- Suggestions for naming folders and files
- Reasons to set quotas on e-mail inboxes
- What a hold notice is and when to consider one
- Guidelines for evaluating software vendors
- How to enchant senior management with your plan
- Options for educating employees and training your staff

Learn to:

- Take inventory of current records and determine what needs to be kept
- Develop efficient filing systems for both paper and electronic records
- Create a records retention schedule
- Document the destruction of sensitive materials

About the Author

Blake Richardson, CRM, is a Certified Records Manager with more than 15 years of experience managing records and information for several Fortune 500 companies. He has been a records manager for CNA Insurance and the Dollar General Corporation, and is active in ARMA International.

## **Users Review**

### **From reader reviews:**

#### **Sandra McNulty:**

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#### **Michael Clark:**

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