



RECORDS MANAGEMENT

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Chapter 10

Geographic Records Management

Geographic Records Storage

- A system for storing and retrieving records by location
- Examples of use
 - Organizations that operate in several locations
 - Scientific studies or collections
 - Property records
 - Tracking construction or maintenance activities

Geographic Records Storage

- Advantages
 - Records for operations relating to a specific location are filed together
 - Groups of related records are easily moved
- Disadvantages
 - The user must know the geographic location or consult an index to find records
 - Guide and folder arrangements can be complex

Geographic Records Arrangements

- Arrangements depend on several factors
 - The type of business
 - The way reference is made to records (city, state)
 - The geographic areas related to records
- Divisions move from major to minor units
 - Country name
 - State name
 - City name
 - Correspondent's name

Compass Terms

- Some records and file guides in geographic filing use compass point terms

Examples of Names with Compass Terms

	FILING SEGMENT	INDEXING ORDER OF UNITS			
	Name	Key Unit	Unit 2	Unit 3	Unit 4
1.	North West Plumbing Inc.	North	West	Plumbing	Inc
2.	North Western Imaging	North	Western	Imaging	
3.	North-West Computer Co.	Northwest	Computer	Co	
4.	Northwest Kitchens	Northwest	Kitchens		
5.	Northwestern Refrigeration Co.	Northwestern	Refrigeration	Co	

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Compass Terms

- In scientific records, compass points are treated as adjectives and placed after the names

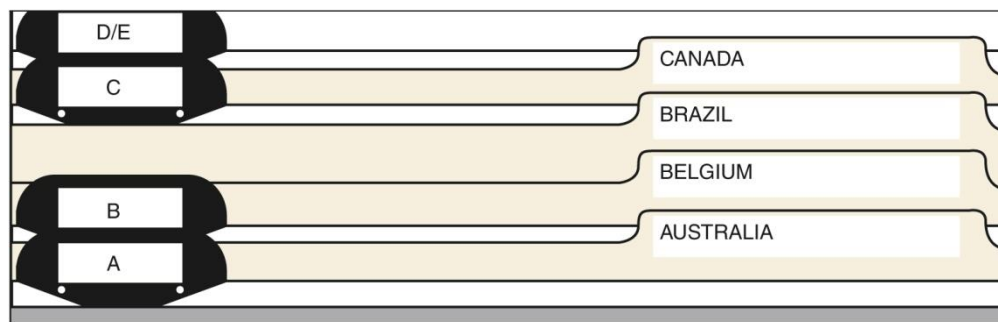
Examples of Names with Compass Terms
(Scientific Document Filing)

	FILING SEGMENT	INDEXING ORDER OF UNITS FOR SCIENTIFIC DOCUMENT FILING		
		Name	Key Unit	Unit 2
1.	North Andreas Fault	Andreas	Fault	North
2.	Northwest Mackinaw Island	Mackinaw	Island	Northwest
3.	Ohio	Ohio		
4.	Eastern Pacific Rim	Pacific	Rim	Eastern
5.	Southern Point Island	Point	Island	Southern
6.	Tennessee	Tennessee		

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Dictionary Arrangement

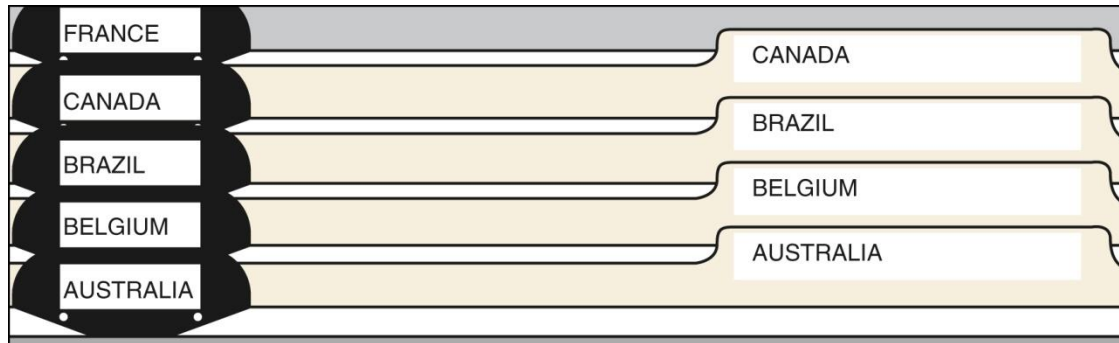
- Records are arranged in alphabetic order
- All types of entries (names, subjects, and titles) are interfiled
- A lettered guide plan uses primary guides labeled with alphabetic letters



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Dictionary Arrangement

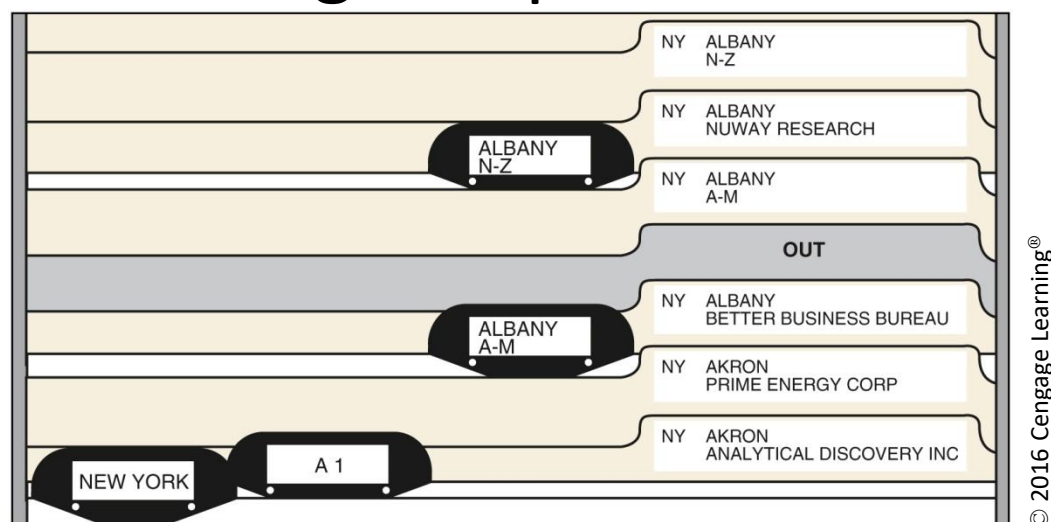
- A location name guide plan uses primary guides labeled with location names



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Encyclopedic Arrangement

- Records are arranged in alphabetic order
- Contains major divisions and subdivisions
- Uses a lettered guide plan (shown) or a location name guide plan



Geographic Records Indexes

- Numeric file list
 - Shows numbers assigned to records in a numeric storage system
 - Is also called an *accession log*
- Alphabetic index
 - Lists all correspondents or subjects in geographic storage
 - Can be a database index or a printed list
 - Should be easy to update and keep current

Geographic Records Indexes

- Master index
 - Contains a listing of all filing segments in the filing system
 - Should be kept in a readily accessible location

MASTER INDEX				
STATE	CITY	INDEXED NAME	BLDG	STREET
NC	Asheville	Better Business	389	Main St.
NC	Asheville	TLC Home Builders	20	River Dr.
NY	Akron	Analytical Discovery Inc	4873	Center St.
NY	Akron	Prime Energy Crop	2470	Miles Rd.
NY	Albany	Better Business Bureau	150	Rowan St.

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Storage and Retrieval Procedures

- Inspecting and indexing
 - Check to see that the record has been released for storage
 - Scan the letter for content to determine its proper place in storage.

May 4, 20--

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Storage and Retrieval Procedures

- Coding
 - Mark the correspondent's location (address) first
 - Mark the correspondent's name next

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May 07, 20-- 11:05 A.M.

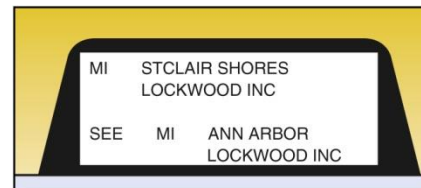
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Storage and Retrieval Procedures

- Cross-referencing
 - May be needed for some names
 - Cross-reference sheets or guides may be used
 - Photocopies of records may be used
 - SEE ALSO notations may be placed onto sheets or onto folder tabs



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Storage and Retrieval Procedures

- Sorting
 - Arrange records numerically by file code or alphabetically by location
- Storing
 - Place records into folders following a lettered guide plan or a location name guide plan
- Retrieving
 - Complete steps for requisition, charge-out, and follow-up procedures