

Office Administration

Chapter 2-File Management

- I File Management
 - A. Procedures for Records Storage
 - (1) Accessing Files
 - a. Direct-access procedures
 - b. Indirect-access procedures
 - (1) Manual Procedures
 - (i) relative index
 - (2) Electronic procedures
 - (2) Inspecting, Indexing, and Coding Records
 - inspecting
 - indexing
 - coding
 - (3) Color Coding
 - (4) Cross-referencing Records
 - (5) Charging Out Records
- B. Files Integrity and Confidentiality
 - (1) Files Integrity
 - a. Verifying record authenticity
 - b. Use of online processes
 - c. Controlled access to records
 - (2) Confidentiality of Records
 - a. Need for controlled access
 - b. Maintaining confidentiality
- C. Maintaining Records Centers and Archives
 - (1) Maintaining Records Centers
 - a. On-site storage
 - b. Off-site storage
 - (2) Maintaining Archives
 - a. Business archive
 - b. Accession register
- D. Security of Records (physical and logical security)
 - (1) User Identification Systems
 - a. User identification and passwords
 - b. Digital signatures and seals
 - c. Encryption and decryption of messages
 - (1) Encryption of messages
 - (i) Public Key
 - (ii) Private Key
 - (2) Decryption of message

- d. Biometric identification system
- e. Magnetic-card based systems
- (2) Need for Trusted Custodian
 - a. Physical records security
 - b. Preservation of organizational memory
 - c. Protection of documents
 - d. Protection of storage media
- (3) User Procedures to Secure Records
- (4) Document Security Features
 - a. Security papers
 - b. Security pantograph
 - c. Microprinting
 - d. Use of thermochromic ink
 - e. Bleed-through numbering
- E. Forms Management (constant and variable information)
 - 1. Key Factors in Forms Management
 - a. Top-management support
 - b. Forms control
 - c. Training for employees
 - 2. Organizing a Forms Management System
 - a. Establishing forms management policy
 - b. Forms analysis
 - c. Forms specifications
 - d. Forms design
 - 3. Controlling a Forms Management System
 - a. Forms production
 - (1) Stock forms
 - (2) Nonstock forms
 - b. Forms recording and filing
 - c. Forms storage and distribution
 - d. Forms control
 - (1) Primary purposes
 - (2) Procedures and policies for forms control
 - (a) Approval of forms changes
 - (b) Reproducing copyrighted forms
 - (c) Justification for forms design
 - 4. Integration with Other Systems
 - a. Inventory Control
 - b. Warehousing
 - c. Purchasing
 - d. Reproduction services
 - e. Office systems