

CERTIFIED RECORDS MANAGER EXAM

DE91 000969

ICRM Development Group

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INTRODUCTION

The Institute of Certified Records Managers (ICRM) is a non-profit, certifying organization of professional records managers and administrators. ICRM members are experienced in information requirements, records and information systems, and the related office systems and technologies. All members have met certification requirements and have received the Certified Records Manager (CRM) designation.

As the field of information and records management moves toward standardization, and as the application of new technologies and technicalities complicate the measurement and demonstration of professional competence, the need for a means of identifying persons who have basic competency increases. The ICRM is providing such a means by testing and certifying basic knowledge.

More and more job announcements are requiring this evidence of competency. Unfortunately, as an organization, NIRMA has a relatively small number of CRMs. The goal of the ICRM Development Group is two-fold; 1) to encourage NIRMA members to obtain their certification by providing basic information and support and; 2) to develop the Nuclear Specialist test module which will demonstrate that bearers have demonstrated expertise in nuclear records management as well as basic competencies..

GETTING STARTED

Applicants for the CRM pay an application processing fee (non-refundable) for processing and application of their credentials. Each part of the examination (six parts) requires payment of an examination fee. In some cases, the applicant's company will pay for the fees if reimbursement is sought.

Interested NIRMA members should complete the Application for Examination, Attachment A, and submit it with the required documentation and fees to the ICRM.

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The basic requirements, test examples and study aids are listed in Preparing for the CRM Examination: A Handbook which is available from the ICRM and may be ordered by calling ARMA headquarters or writing to the ICRM at PO Box 8188, Prairie Village, Kansas, 66208.

WHAT THE EXAM COVERS

The exam is intended to cover the full scope of records management and is very comprehensive. Because it is used by many varied industries, it may differ from the normal practices seen and used in the utility or research environments. For that reason, it is wise to review the exam scope and may be prudent to go over the sample questions and support materials to be sure that your answers will be given from the broad-base perspective expected. An outline of the covered areas is provided in Attachment B.

If significant interest is shown by NIRMA members in taking the exam, we will try to schedule general study sessions for the various sections of the exam at upcoming symposia. There are tracks available for this purpose at ARMA's conference which will take place in San Francisco in November.

THE NUCLEAR SPECIALIST DESIGNATOR

The Development Group is actively working on creation of a seventh module which will contain questions specifically geared toward testing competency in the area of nuclear records management. A reciprocal agreement between the ICRM and NIRMA will allow NIRMA to develop the test bank and the ICRM to administer the test. Qualified CRMs will be able to add the designator "NS" to their certification if they pass the exam.

Development of this type of test addition is a new concept for both the ICRM and NIRMA. In the past, certifying bodies whose requirements for records management were different from those tested by the ICRM developed and administered their own examinations. The Medical Records Association is one such body. Because our needs are generally considered to be an expansion of the basic records management process, and because NIRMA is a much smaller organization than the medical records group, it was felt that we needed to develop some other way to show competency.

By piggy-backing our unique requirements on to the existing CRM exam we are able to;

1. Take advantage of the existing structure and test bank administered by the ICRM
2. Focus on those areas which are truly unique to nuclear records management
3. Better utilize our volunteer membership in creation of a test bank instead of administration of an exam

The benefits to the ICRM may also be substantial. If this pilot program works well, there are a number of other industries which also have a need for expanded testing but do not have the resources to administer their own exam process. Some day there may be CRMs who are nuclear specialists, or banking specialists, or airline.....

HOW YOU CAN PARTICIPATE

As a NIRMA member there are two basic things you can do to support this activity. The first is to obtain your CRM. Even if you are a seasoned "nuclear veteran" with numerous years of experience the CRM is a way of demonstrating that competency and also of upgrading the professionalism of the function.

Secondly, each NIRMA member can assist the Development Group in creation of the test module. We are actively seeking test questions which will be thought provoking, challenging, and professionally telling. The greater the variety the better! In every case, the emphasis should be on what we need to know to successfully function as nuclear records managers and why we are unique.

Any of the members of the Development Group may be contacted to submit questions.

UPCOMING ACTIVITIES

The following activities are scheduled for 1990 & 1991:

1. Development of the requirements for candidates for the Nuclear Specialist Exam
2. Completion of the initial test bank of questions
3. Development of the application for the exam
4. Development of a test guide and sample questions
5. Scheduling and presentation of study sessions for both the CRM and the NS exams
6. Presentation of the first NS exam (November of 1992?)

DISCLAIMER

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APPLICATION FOR CERTIFICATION BY EXAMINATION

INSTITUTE OF CERTIFIED RECORDS MANAGERS
P.O. BOX 8188, PRAIRIE VILLAGE, KS 66208

FOR ICRM BOARD OF REGENTS USE ONLY

Date application/
fees received

Examination Control No.

APPLICATION STATUS

- ☐ Original application - Complete entire form and submit with non-refundable \$60 application processing fee.
- ☐ Supplementary application - For additional or repeat examination sections: Complete Parts 1 and 2 - Add all new data since last application. Enclose only \$40 for each section of examination being taken.

Applicant eligible for examination?

☐ Yes

☐ No

Application and all materials submitted have been reviewed for the ICRM Board of Regents by:

Signature

Date

1. PERSONAL

Full Name (Last, First, Middle Initial)

Present Employer

Present Position Held

Send all mail to (check one only) ☐ Residence ☐ Business

Residence Address

Home Phone
()

Business Address

Business Phone Ext.
()

2. EXAMINATION SECTIONS AND DATES REQUESTED (Applicant must pass Sections I through V before applying to take Section VI)

I Management Principles
and the Records Management
Program

Dates
☐ _____

II Records Creation and Use

☐ _____

III Filing Systems Storage and
Retrieval

☐ _____

IV Records Appraisal, Retention,
Protection, and Disposition

Dates
☐ _____

V Equipment, Supplies and Technology

☐ _____

VI Case Studies

☐ _____

3. RECORDS MANAGEMENT EXPERIENCE AND EDUCATION Candidate must have as a minimum a degree from a four-year accredited college and three years full time documented professional experience in three or more of the categories listed in 3A below. At the discretion of the Board of Regents two years of appropriate professional experience may be substituted for each year of education below the baccalaureate. NOTE: Applicant must submit an official transcript showing proof of education. If a transcript is unavailable, a photocopy of the degree certificate may be acceptable. Applicant must also submit copies of job descriptions for all applicable positions or in lieu of, a letter from employer attesting to applicant's Records Management work and responsibilities. Applicants who are consultants or (vendor) sales personnel must submit letters from two or more clients verifying services performed. Applicants should indicate in 3 A below, categories in which qualified.

A. CATEGORIES IN WHICH QUALIFIED: (Check appropriate boxes)

☐ Management of Records
Management Program

☐ Records Creation and Use

☐ Active Records System

☐ Records Protection

☐ Inactive Records Systems

☐ Records Appraisal, Retention,
and Disposition

☐ Records and Information
Management Technology

B. EDUCATION

Are you a high school graduate?

No ☐ - Highest grade completed _____

Yes ☐ - Month and year graduated. _____

Name and address of high school

Name and location (City, State and ZIP Code, if known) of college or university (If you expect to graduate within nine months, give MONTH and YEAR you expect to receive your degree)

Dates Attended		Year Completed		No. of Credits Completed		Type of Degree (B.A. etc.)	Year of Degree
From	To	Day	Night	Semester Hours	Quarter Hours		

3 C. EXPERIENCE (If more space is needed or for explanatory remarks, use an additional sheet of paper.)

DATES (MONTH/YEAR)		POSITION HELD	NAME OF EMPLOYER AND CITY/STATE
FROM	TO PRESENT		

CANDIDATE'S CERTIFICATION

1. I certify that the statements made by me in this application are complete and true.
2. In applying for registration, I agree to the stipulations of eligibility for the CRM designation as stated in the Constitution and By-laws. I understand I must meet certain experience and other requirements and must possess good character and high business ethics in order to obtain the CRM designation.
3. The Board of Regents has my permission to contact a former employer or educational reference for verification and or clarification.
4. I have read and will abide by the provisions of the ICRM Constitution and By-laws.
5. I further understand and agree that the CRM designation may be terminated at any time by the Board of Regents in the event of violation of the Constitution and By-laws or other just cause, and further, that the decision of the Board of Regents is final.

CANDIDATE'S 
SIGNATURE _____

DATE _____

CHECKLIST FOR ORIGINAL APPLICATION Candidate: Please check the following before submitting this application.

- ☐ Form is dated, complete and signed in ink.
- ☐ A check for \$60 (non-refundable) plus \$40 (U.S. Dollars) for each examination section payable to the Institute of Certified Records Managers is enclosed.
- ☐ Reference letter requested from employment supervisor of **each** company from whom you have submitted qualifying experience or if consultant, letters from at least two clients. Correspondence attesting to this experience should be sent **directly by the attesting person** to the Institute of Certified Records Managers.
- ☐ An official transcript or a photocopy of degree certificate is enclosed.
- ☐ Application is being mailed sufficiently in advance of cut-off date.

PART I

MANAGEMENT PRINCIPLES AND THE RECORDS MANAGEMENT PROGRAM

A. Principles of Management

1. Classic management functions
 - a. Planning
 - b. Organizing
 - c. Directing
 - d. Controlling
2. Management theories and concepts
 - a. Scientific management
 - b. Line versus staff
 - c. Management by objectives
 - d. Management by exception
 - e. Theories X and Y
 - f. Theory Z
 - g. Quality circles
 - h. Span of control
 - i. Other
3. Decision making
4. Goals and objectives

B. Development of Records Management

1. The life cycle concept
2. History of records management
 - a. Early archival and records programs
 - b. Current issues and legislation
3. The evolving information society
 - a. The technological revolution
 - b. Information resources management
 - c. Inter-related information systems
4. Roles of professional organizations

C. Planning a Records Management Program

1. Scope and policy
2. Techniques for conducting study
3. Integrated systems approach
4. Role of management analyst
5. Cost justification
6. Promotion and management support

D. Organizing a Records Management Program

1. Determining functions
2. Assigning responsibilities and authorities
3. Organizational placement
4. Estimating resources

E. Directing a Records Management Program

1. Staffing
 - a. Recruitment and selection
 - b. Training, education, and development
 - c. Appraising and rewarding performance
 - d. Job descriptions and salary administration
2. Leadership
3. Employment relations
4. Service to organization
5. Program budgeting

F. Controlling a Records Management Program

1. Work measurement
2. Self-inspection guides
3. Inspections and program reviews
4. Setting and achieving objectives
5. Reports and follow-up

G. Program Implementation Cycle

1. Program promotion
2. Standards and guidelines
3. Records management manuals
4. Training and orientation
5. Technical assistance and support
6. Policies and procedures
7. Auditing and evaluation

H. Legal and Ethical Responsibilities

1. Legal requirements
 - a. Government regulations
 - b. Contracts
 - c. Right to privacy
 - d. Copyrights and patents
 - e. Proprietary information
2. Litigation considerations for records
 - a. Admissibility of evidence
 - b. Disclosure
 - c. Privileged information
3. Ethical conduct
 - a. Concept of professionalism
 - b. ICRM Code of Ethics

I. Outside Resources

1. Consultants
 - a. Consultant function
 - b. Use of in-house staff versus consultants
 - c. Team concept
 - d. Effect on organizational development
2. Vendors and service bureaus
 - a. Equipment and supplies
 - b. Training
 - c. Records storage
 - d. Data processing
 - e. Micrographics
 - f. Word processing
 - g. Temporary staff
 - h. Other
3. Professional publications
4. Professional organizations and certifying bodies
5. Academia
 - a. Degree programs
 - b. Certificate programs
 - c. Related courses
6. Government
 - a. Standards and models
 - b. Research
 - c. Publications

PART II

RECORDS CREATION AND USE

A. Records Creation

1. Definition and objectives
2. Cost considerations
3. Systems analysis
 - a. Feasibility studies
 - b. Paperwork surveys
 - c. Documentation
4. Word processing
 - a. Word processing centers
 - b. Stand-alone systems
 - c. Networks
5. Management and control
6. Training and guidance

B. Correspondence Management

1. Definition and objectives
2. Economical production
 - a. Machine dictation
 - b. Word processing
 - c. Form and guide letters and paragraphs
 - d. Format standards
3. Business writing
 - a. 4-S formula
 - b. Effective communication
 - c. Better organization image
 - d. Limiting to essentials
4. Standards and procedures
 - a. Signatory authorities and reviews
 - b. Prompt preparation and short response time
 - c. Stationery, format, and style
 - d. Copies and distribution guidance
 - e. Pre-classification for filing and retention
 - f. Use of correspondence manual

C. Directives Management

1. Definition and objectives
2. Preparation guidelines
 - a. Clear writing style and format
 - b. Clearance, coordination, and approval
 - c. Permanent versus temporary
 - d. Functional classification and coding
 - e. File for documentation
 - f. Limiting to essentials
 - g. Readability formulas
3. Distribution and maintenance
 - a. Distribution lists, codes, and controls
 - b. Loose-leaf format
 - c. Inventories and indexes
 - d. Master set for historical record
4. Alternatives to paper directives
 - a. Microforms
 - b. On-line systems

D. Forms Management

1. Definition and objectives
2. Creating effective forms
 - a. Information and design analysis
 - b. Paperwork flowcharts

- c. Procedures analysis
 - d. Combine, eliminate, and revise
 - e. Ease of preparation and use
 - f. Size, format, spacing, layout
 - g. Instructions, titles, and identification
 - h. Primary and secondary users' viewpoints
3. Forms control
 - a. Inventory and catalog
 - b. Classification, coding, and control numbers
 - c. Approval authorities and procedures
 - d. Functional files and history files
 - e. Authorizing directives
4. Production and distribution
 - a. Printing specifications and materials
 - b. Usage analysis and stocking patterns
 - c. Use of current edition
 - d. Production technology
5. Specialty forms

E. Mail Management

1. Definition and objectives
2. Incoming mail
 - a. Controls
 - b. Sorting
 - c. Routing
 - d. Office codes and distribution guides
3. Outgoing mail
 - a. Services
 - b. Schedules
 - c. Costs
 - d. Security
4. Internal and external messenger/courier services
5. Electronic mail

F. Reports Management

1. Definition and objectives
2. Reports analysis
 - a. Reports inventory
 - b. Measuring reports costs
 - c. Evaluating effectiveness
 - d. Cancelling, combining, revising
 - e. Quality improvement for writing reports
 - f. Relation to management information systems (MIS)
 - g. Using COM in reports control
3. Reports control
 - a. Approval authorities and procedures
 - b. Control numbers or symbols
 - c. Authorizing directives
 - d. Functional file
4. Automated reporting systems

G. Reproduction Management

1. Definition and objectives
2. Copiers
 - a. Costs and controls
 - b. Centralized versus distributed
 - c. Quality needs analysis
3. Printing facilities
 - a. In-house versus external
 - b. Advanced systems, costs and benefits

H. Special Media Management

1. Magnetic
 - a. Computers
 - b. Word processors
 - c. Audio and video recorders
2. Microforms
3. Engineering drawings and cartographic materials
4. Scientific recordings, art works, photos, and other unique items

PART III

RECORDS SYSTEMS, STORAGE, AND RETRIEVAL

A. Basic Concepts

1. Assessing information needs
 - a. Value of information
 - b. User needs
 - c. Information value versus retrieval cost
2. Controlling volume of information
 - a. Controlled filing
 - b. Systematic disposition
3. Information retrieval
4. Classifying information
5. Basic file groups
6. Rules of alphabetic order

B. Filing Systems

1. Alphabetic
2. Numeric
3. Other

C. Information Retrieval Systems

1. Definition and objectives
2. Indexing
 - a. Search order
 - b. Cross references
 - c. Catchword indexing
3. Manual retrieval
4. Computer-assisted retrieval
 - a. Full text storage and access
 - b. Automatic index generation
 - c. Keywords
 - d. Descriptors and captions
 - e. Searching techniques
 - f. Coordinated (inverted) indexing
 - g. Software selection or development
 - h. Bar code technology

D. Active File Systems

1. Definition and objectives
2. Design and planning
3. Uniformity
 - a. Economies in equipment, supplies, and training
 - b. Ease of reorganization or transfer
4. Location
 - a. Decentralized
 - b. Centralized
 - c. Decentralized with central control

5. Assignment of responsibilities
 - a. Informal
 - b. Formal
6. Filing manual
 - a. Combined with retention schedule
 - b. Classification outline
 - c. Index
 - d. Conversion table
 - e. Implementation
7. Equipment and supplies
 - a. Standardization
 - b. Cabinets and shelving
 - c. Folders, labels, guides
 - d. Cost versus effectiveness
8. Media selection
 - a. Paper
 - b. Film
 - c. Magnetic
 - d. Other
9. Microform-based active systems
 - a. Advantages and disadvantages
 - b. Integrating computer output microfilm (COM) and source documents

E. Active Files Operations

1. Functions and objectives
2. Files stations
 - a. Physical arrangement
 - a. Approved files sequence
 - b. Special storage (film, tape, etc.)
4. Access restriction and control
 - a. Privacy and security requirements
 - b. Protective devices
 - c. Charge-out cards and other controls
5. Filing steps
6. Review and maintenance
 - a. Daily filing
 - b. Cross references and index entries
 - c. Measuring productivity
 - d. Inspections for misfiles
 - e. Inventories
 - f. Removing inactive records
 - g. Work analyses and reports

F. Inactive Files Operations (Records Centers)

1. Functions and objectives
2. Types of records centers
3. Off-site storage
 - a. Cost of space and equipment
 - b. Storage density
 - c. Comparison with costs of filming or digitizing
4. Facility selection and preparation
 - a. Site location
 - b. Space requirements
 - c. Security and safety
 - d. Non-storage areas
5. Managing the records center
 - a. Control procedures
 - b. Retention schedules compliance
 - c. Roles of custodian and owner
 - d. User needs

6. Operating the records center
 - a. Accessions
 - b. Locating and indexing methods
 - c. Search and charge-out
 - d. Refiles and interfiles
 - e. Disposal procedures
 7. Emergency provisions
 8. Review and evaluation
 - a. Performance statistics
 - b. Work analysis and reports
- G. Special Storage Requirements**
1. Media
 - a. Film
 - b. Magnetic
 - c. Paper
 - d. Other
 2. Non-standard sizes items
 - a. Engineering drawings and maps
 - b. Continuous paper records
 - c. Cards and specialty forms
 - d. Other
- H. Converting Files to New Systems**
1. Paper to other media
 - a. Indexes and system design
 - b. Converting backlog and current records
 - c. Disposition of paper
 2. Changing storage methods
 - a. Drawer to shelf
 - b. Preparing new labels, folders, guides
 - c. Manual or automated conversion tables
- I. Automated Paper and Film Systems**
1. Software development or selection
 2. Automated management techniques

PART IV

RECORDS APPRAISAL, RETENTION, PROTECTION, AND DISPOSITION

- A. Basic Concepts**
1. Records versus nonrecords
 - a. Definitions
 - b. Company designated legal documentation
 - c. Reference materials
 - d. Personal materials
 2. Records series
 - a. Definition
 - b. Relation to files classification
 3. Records media and records content
 4. Records disposition program
- B. Records Inventory**
1. Definition and objectives
 2. Planning the inventory
 - a. Organization, staffing, and work schedule
 - b. Authority, support, publicity
 - c. Developing forms and procedures
 - d. Physical inventory versus questionnaires
 - e. Computer assistance

3. Conducting physical inventory
 - a. Interviews and physical observations
 - b. Progress review and reporting
 4. Collecting data
 - a. Completing inventory form
 - b. Identifying record copy
 - c. Functional and physical descriptions
 - d. Location, quantity, and use
 - e. Active and inactive designation
 - f. List of forms, reports, and other documents
 - g. Use of filing equipment and supplies
 5. Determining file patterns
 - a. Functional groups
 - b. File types
 - c. File subheadings
 6. Organization of inventory data
 - a. Preliminary groupings
 - b. Identified duplicates
 - c. Standard terminology
 - d. Summaries and totals
 7. Records appraisal criteria
 - a. Operating
 - b. Administrative
 - c. Fiscal
 - d. Legal
 - e. Research
 - f. Archival
 8. Internal requirements
 - a. Common administrative records
 - b. Substantive records
 9. External requirements
 - a. Laws and regulations
 - b. Contractual obligations
- C. Retention Schedules**
1. Definition and objectives
 2. Preliminary schedule development
 - a. Users' input
 - b. Correlation with filing scheme
 - c. Determination of operational, legal, financial, research, and historical values
 - d. Estimating retention costs, risks, and benefits
 - e. Establishing retention periods for office and storage
 3. File breaks
 - a. Outside events
 - b. Calendar dates
 - c. Time periods
 4. Clearances and approvals
 - a. User office
 - b. Legal counsel
 - c. Administration and management
 - d. Archivist review
 - e. Documentation
 5. Final issuance
 - a. Consolidation of all records series
 - b. Publication
 - c. Procedures for changes
 6. Retention of non-paper media
- D. Implementing and Administering Schedules**
1. Promotion, support, and training

2. Applying schedules
 - a. Identify and organize records
 - b. Identify unscheduled items
 - c. Initiate required revisions
3. Relocation to storage
 - a. Economies of bulk handling
 - b. Perpetual versus periodic
 - c. Tie-in with file breaks
 - d. Benefits of screening
 - e. Microfilm and other alternatives
 - f. Formal procedures and documented action
 - g. Automated support
4. Transfer of vital records
5. Permanent retention in archives
6. Donation to universities or government
7. Disposal
 - a. Physical destruction
 - b. Sale
 - c. Security considerations
 - d. Documentation

E. Archives Program

1. Functions and objectives
2. Appraisal for archival value
 - a. Historical and research values
 - b. Evidential and informational values
3. Arrangement, access, and use
 - a. Provenance and original order
 - b. Protected environment
 - c. Service to researchers
 - d. Finding aids, lists, and indexes
4. Government (public) archives
5. Private archives
 - a. Institutional
 - b. Business
6. Relation to manuscript collections
7. Conservation and preservation of archival materials and manuscripts

F. Vital Records Program

1. Functions and objectives
2. Identification of vital records
 - a. Continuation of operations under emergency conditions
 - b. Reconstruction of information after disaster
 - c. Documentation of personal and property rights
 - d. Protection of assets/liabilities
 - e. Physical security from theft
 - f. Preparation of master list
3. Risk Analysis
 - a. Estimating disaster potential and consequences of information loss
 - b. Estimating cost of information protection
4. Protection methods
 - a. Duplication and dispersal
 - b. On-site and remote storage facilities
 - c. Equipment: safes, vaults, and insulated file cabinets
 - d. Access restrictions
5. Operating procedures
 - a. Published plan

- b. Transfers and updates
- c. Retrieval and restoration capability
6. Information security
 - a. Controlled distribution
 - b. Protection of security copies

G. Disaster Recovery Program

1. Functions and objectives
2. Relation to vital records program
3. Contingency plans
 - a. Classification of disasters
 - b. Responsibility for preparedness
4. Implementing procedures
 - a. Salvage and restoration of damaged records, film, and magnetic media
 - b. Duplication and distribution
 - c. Reading equipment (film, tape, etc.)
 - d. Available data processing equipment
 - e. Reconstruction from alternate sources
 - f. Program audits and tests

PART V

EQUIPMENT, SUPPLIES, AND TECHNOLOGY

A. Office Filing Equipment and Supplies

1. File cabinets
 - a. Vertical
 - b. Lateral
 - c. Special purpose
2. Shelf filing
 - a. Stationary shelving
 - b. Movable units
3. Power (mechanized) files
4. Safes and security units
5. Visible index records units
6. Supplies
 - a. Folders, tabs, and labels
 - b. Guides
 - c. Out cards and other controls
7. Vaults
8. Building design considerations
 - a. Space and electrical requirements
 - b. Layout design
 - c. Floor loading
 - d. Safety and security

B. Records Center Facilities

1. Shelving
 - a. Steel versus wood
 - b. Spacing and layouts
 - c. Catwalks versus ladders
2. Storage containers
 - a. Standard and nonstandard
 - b. Strength and quality
3. Materials handling equipment
4. Building design considerations
 - a. Efficiency and economy
 - b. Safety devices and security techniques
 - c. Floor load capacity
 - d. Controlled environment

- e. Loading dock access
- f. Staging and processing areas

C. Micrographics

1. Film
 - a. Types
 - b. Sizes
 - c. Forms/modes
2. Cameras
 - a. Types
 - b. Reduction ratios
3. Processors
4. Quality controls
 - a. Density
 - b. Resolution
 - c. Archival
 - d. Quality index
5. Duplicators
6. Readers and reader-printers
7. Index methods
8. Updatable systems
9. Computer output microfilm (COM)
10. Computer-assisted retrieval (CAR)
11. Computer input microfilm (CIM)
12. Storage considerations

D. Telecommunications

1. Transmission science
2. Types of transmissions
 - a. Text
 - b. Data
 - c. Voice
 - d. Graphics
 - e. Video
3. Transmission methods and media
 - a. Protocols
 - b. Parameters
 - c. Modems
 - d. Wire cables
 - e. Coaxial cable
 - f. Microwave systems
 - g. Satellites
 - h. Fiber optics
4. Networks
 - a. Local area network (LAN)
 - b. Microcomputer

E. Word Processing

1. Hardware
 - a. Dedicated systems
 - b. Multifunctional systems
 - c. Input systems
 - d. Communications capabilities
 - e. Peripherals
 - f. Dictation equipment
2. Software
3. Storage media

F. Computers

1. Computer sizes
 - a. Performance characteristics
 - b. Configurations

2. Hardware components
 - a. Input (data entry) methods and devices
 - b. Central processing unit
 - c. Storage devices
 - d. Output devices
 - e. Peripherals
3. Software and firmware
 - a. Operating system
 - b. Programming languages
 - c. Applications systems
 - d. Assemblers, compilers, interpreters
 - e. General purpose software
 - f. Applications software
 - g. Data administration
4. Computer operations
 - a. Real time/interactive/batch
 - b. Backup
 - c. Security
5. Data files
 - a. Format
 - b. Access

G. Reprographics

1. Printing and duplication
2. Copier types
3. Phototypesetting

H. Optical Disks/Image Systems

1. Digitized microfilm image systems
 - a. Image scanning
 - b. Electronic image transmission
2. Computer graphics
 - a. Computer-aided design (CAD)
3. Facsimile systems
4. Optical disk systems
 - a. Disk sizes, types
 - b. Input devices
 - c. Disk drives
 - d. High resolution monitors
 - e. Disk storage devices ("jukeboxes")
 - f. Printers
 - g. Indexing techniques

I. Standardizing Equipment and Technology

1. Need for standards
2. Standards organizations
3. Voluntary versus mandatory

J. Ergonomics

1. Environmental considerations
2. Office furniture and fixtures
3. Office space and layout

K. Media Preservation

1. Paper products
2. Film
3. Electronic or magnetic
4. Other

PART VI CASE STUDIES

The case studies represent the application portion of the CRM examination. As such, they presume the candidate has demonstrated the competencies measured in all preceding parts. The case studies are fictitious "real life" problems that records managers or consultants specializing in records management would be likely to encounter in the course of their work.

The examinee must read carefully the problems posed

in the case studies, and develop a highly professional and learned written answer based on the action instruction provided in each case. It is important that candidates understand that some case problems in Part VI may be comprehensive in scope, and thus the solution may draw from several areas of records management. Therefore, the candidate's response must be based on his or her comprehension and ability to present the several aspects of the records management problems involved. Other cases may describe problems involving only one element of records management.

END

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