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Eesti tuleviku heaks



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ESF programm „Kutsete süsteemi arendamine“

OCCUPATIONAL STANDARD

Records manager, level 6

The occupational standard is a document that describes the job and competence requirements, i.e. a set of skills, knowledge and attitudes required for successful job performance in a particular occupation.

Application areas of the occupational standard

- 1) Drafting of curricula and training programmes meeting the requirements of labour market.
- 2) Evaluation of competence of the people, incl self-evaluation and conformity evaluation upon awarding an occupational qualification.
- 3) Description and introduction of occupational qualifications.
- 4) Career planning and creation of a basis for lifelong learning.
- 5) Identification of personnel training needs and planning of training.
- 6) Drafting of job descriptions and recruitment of employees.
- 7) Comparison of occupational and educational qualifications.

Occupational qualification title	Estonian qualifications framework (EstQF) level
<i>Records manager, level 6</i>	6

Part A JOB DESCRIPTION

A.1 Job description

A records manager, level 6, is a specialist whose task is to create and keep functioning an organisation's information and records management. A records manager's work supports the performance of an organisation's other core and supporting functions. A records manager's job includes managing work and executing tasks related to information and records. A records manager may work in a private or a public sector organisation.

A records manager prepares, transfers, receives and sends out documents, manages a records system, monitors functioning of the information and records management, arranges access to records and ensures storing and preservation of documents. A records manager works oneself and arranges the organisation's work with different information systems and software applications, the centre of which is an electronic records management application.

A records manager's job is integrated into the organisation's general information management and one's tasks may partially overlap with the duties of specialists from other professional fields dealing with information. A records manager executes these tasks oneself or cooperates with specialists from close professional fields. While participating in organisation's records management, a records manager works closely with the management and cooperates with a communication specialist. As an information and records management system is both substantive and technological, a records manager cooperates with an IT specialist to guarantee functioning of the infotechnological systems. A records manager participates in managing and adjusting organisation's processes in cooperation with a quality management and other specialists. Records management and archival management are closely connected. A records manager participates in the archival management in cooperation with an archivist.

In one's job a records manager encounters confidential information, often while arranging access to such information. The work with personal data, business secrets or other confidential information poses to a records manager high ethical requirements.

A.2 Units

The occupation of a records manager, level 6, consists of nine units.

A.2.1 Managing information

- 1) Establishing the need for information and analysing the duty to inform
- 2) Establishing information resources
- 3) Assessing the value of information
- 4) Identifying the means and devices of storing information

A.2.2 Arranging and developing records management

- 1) Planning resources necessary for the functioning of the field of activity
- 2) Participating in the preparation of normative documents related to the field of activity inside an organisation
- 3) Planning the development of the field of activity or participating in it
- 4) Participating in the development of the information systems used for information and records management
- 5) Preparing reports on records management

6) Project management in developing the field of activity

A.2.3 Analysing organisation's activities, arranging documentation and records management

- 1) Analysing organisation's activities and preparing a classification scheme
- 2) Classification of records, preparing document templates and arranging their use
- 3) Participating in assessing the value of documents
- 4) Managing documentation
- 5) Identifying metadata, ensuring their application and managing registers

A.2.4 Arranging access to information and documents

- 1) Identifying users, user roles and user groups, assigning authorities and arranging the management
- 2) Arranging information and document retrieval management
- 3) Applying Information security measures

A.2.5 Managing information and records management systems

- 1) Participating in the launch of an information and records management system and its developments
- 2) Adjusting the information and records management system
- 3) Establishing a paper-based records management system, its launch and keeping it in function

A.2.6 Ensuring drawing up, capture and usability of documents

- 1) Ensuring properly drawing up of documents
- 2) Checking documents for integrity and the conformity with requirements
- 3) Managing the process of receiving and sending out documents, arranging the capture and registration of documents
- 4) Ensuring the usability of documents
- 5) Monitoring the validity and related dates of validity of documents, checking duly document execution

A.2.7 Information management in work processes

- 1) Applying process-based records management principles
- 2) Administrating and monitoring work processes and tasks

A.2.8 Arranging archival management

- 1) Creating and arranging the organisation's archive
- 2) Arranging archiving of information and records
- 3) Arranging and describing documents to be archived
- 4) Dispositioning documents to be destroyed or transferred to an archiving institution
- 5) Arranging the use of archived documents

A.2.9 Training and counselling

- 1) Identifying training needs
- 2) Drafting a training plan and a training budget. Arranging trainings.
- 3) Preparing training materials and user guidelines
- 4) Counselling on records management

A.3 Working environment and specific aspects of work

A records manager works inside, usually at a desk and his/her working hours are generally fixed. The managing units of the records manager's profession are diverse, executive parts are rather routine. The profession does not require any physical effort. The risk factors of the profession are mental stress and a forced position.

A.4 Tools

The main tools are office supplies and equipment and a computer.

A.5 Personal characteristics necessary for this job: abilities and personality traits

A records manager's job assumes willingness to communicate, ability to establish itself and



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cooperate, readiness for decision-making and sense of responsibility. One must be conscientious and trustworthy. A records manager's profession requires correctness, punctuality, speed and persistence.

A.6 Occupational training

The 6-th level records manager has a higher education. In case a person has no professional higher education, professional additional training is recommended.

A.7 Possible job titles

Records manager, senior specialist, specialist

Part B

COMPETENCE REQUIREMENTS

B.1. The structure of the occupational qualification

Verification of competencies B.2.1–B.2.18 is required upon applying for Records manager, level 6 profession.

B.2. Competences

B.2.1 Managing information

EstQF level
6

Performance indicators :

- 1) by analysing identifies information needs of the organisation, its structural units or employee groups and, if needed, according to the roles of employees, deciding which task is meant for execution, which is for decision-making or which information concerning the organisation is for notification; with regard to the company owners and other interested groups determines duties to inform and measures for informing required by the acts of law (public information, transfer of documents, etc);
- 2) by the means of observation, questioning or in any other manner that enables to give an overview, determines the organisation's types of information resources (library, database, information system, archive etc) and tools of management (Intranet, Extranet, other information systems);
- 3) assesses the value of information according to the criteria of storage, disclosure, topicality, etc and drafts a descriptive normative document;
- 4) participates in , usually together with an organisation's IT specialist, determining the devices for storing information (paper, digital) as a result of which a normative document describing the assets of information is prepared.

Supporting knowledge :

- 1) the principles of determining information needs and directing information search behaviour;
- 2) the types of information resources and management tools;
- 3) the principles of disclosing information, duties to inform and accountability;
- 4) the criteria and methods of assessing the value of information;
- 5) the means and devices of storing information.

Assessment method(s) :

Test and a practical task or an interview.

B.2.2 Arranging and developing records management

EstQF level
6

Performance indicators:

- 1) plans necessary resources for the organisation's record management, including office supplies, equipment and devices; plans the employees' requirements taking into account the amount of activity and the nature of duties;
- 2) drafts or participates in drafting normative documents of the field of activity, for example: operations procedure, records management procedure, list of documents, classification scheme, approved process schemes, quality manual, etc), taking into account the rules and regulations of national acts of law, prevailing standards and instructions and the organisation's objectives;

<ol style="list-style-type: none"> 3) participates in planning the strategy of the field of activity taking into account the organisation’s general development strategy and international, national or other strategies (for example the information society strategy and its implementing legislation) influencing the organisation’s activity; 4) participates in planning the developments of the field of activity taking into account the organisation’s objectives, preparing development projects, resource plans, budgets, etc; 5) participates in identifying functional and non-functional requirements of the information and records management system taking into account requirement recommendations (for example: MoReq, EVS-ISO 16175), the best practice of the functional requirements of the software, the purposes of the system functioning and usability; 6) participates in developing a records management system by preparing procurement and analysis documents, monitoring the goods and services on the market and testing the results; 7) prepares reports on records management on the basis of the assessment criteria of efficiency, clarity and performance of the field of activity; 8) in developing the field of activity, applies project management principles by choosing an appropriate project management methodology, management system (infotechnological system) and ensuring necessary resources for the efficient project implementation.
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) the development and tendencies of information and records management; 2) the functioning principles of the state information system and its administration system (RIHA) and the use of semantics software in information and records management; 3) the requirements and guidelines of Estonian and international records management standards; 4) the principles of records management development (for example: modularity, integration) and the principles of the development process of information systems (for example: agility); 5) the principles of arranging operations procedures and records management; 6) the judicial regulations of information, records and archiving management; 7) the analytical methods, means and outcomes in the field of records management.
<p><u>Assessment method(s):</u> Test, practical task and interview</p>

B.2.3 Analysing organisation’s activities, arranging documentation and records management	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) analyses an organisation’s functions, processes and procedures according to the organisation’s tasks and by using normative documents and suitable methods (for example the analysis of functions, the sequence of procedures, the analysis of records); prepares a classification scheme (list of documents) identifying the levels of classification and identifying series; 2) prepares a list of document types according to the requirements established in normative documents and the documentation traditions and needs; prepares document templates according to the design and format of relevant document types taking into account the functionality of the information system in use; 3) participates in assessing the value of documents identifying the retention period of records/series according to the requirements established in normative documents, the organisation’s needs and archiving assessments; prepares a normative document for managing the records life cycle and archiving of documents (retention schedule, life cycle model or other) according to the retention period, needs for locating documents, etc; 4) identifies which information is to be captured and registered as a document and what kind of 	

<p>media is used for storing (paper, digital; text, image, audio, etc); identifies which activities concerning which record types shall be documented according to the requirements of normative documents, work arrangements and the purposes of using the document;</p> <p>5) determines the principles of record registration, record registers and the composition of data according to the requirements established in acts of law and the organisation’s needs; prepares a list of document types which shall not be registered; identifies metadata of document types (in addition to registration metadata) by creating a relevant list and taking it in use in the system, taking into account the verification need of the activity and record tracking by key words; creates or takes in use a glossary of terms; monitors the quality of using metadata in the system.</p>
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) analytical methods of an organisation’s activity; 2) the components of a records system and the principles of composing and using them; 3) the role of registers, classification schemes and other administrative tools in arranging records management; 4) document types, the principles of use and requirements for drawing up; 5) the principles of assessing the value of information and documents, the requirements established in acts of law for assigning retention periods; 6) the nature of the documentation tradition and its changes in an electronic environment; 7) the role of metadata in record management, their types and principles of use.
<p><u>Assessment method(s):</u> Test and a practical task</p>

B.2.4 Arranging access to information and documents	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) participates in identifying user roles and user groups in the information and records management system and in drafting the description of authorities or in applying the existing system of users, user roles or user groups in the information and records management system, changing it if required; 2) participates in assigning access controls to information and records by adding access restrictions to the information system and markings to records or assigning records to be public with the help of metadata; monitors the need for changes in access controls by changing or arranging access controls or the terms of disclosure; 3) arranges the physical protection of paper documents and applies suitable information security measures (locked or fireproof file cabinets, safes, etc); 4) makes copies or extracts of records with access restrictions following the terms of document access restrictions when forwarding; 5) monitors the implementation of document access restriction terms. 	
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) the principles of identifying users, roles and user groups and methods of arranging information and records management; 2) the principles of administrating and arranging the terms of access restriction to information and records; 3) the measures of information security and the principles of applying them. 	
<p><u>Assessment method(s):</u> Test and a practical task</p>	

B.2.5 Managing information and records management systems	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) participates in the launch of an information and records management system by adjusting it and testing the suitability of the system (conformity with functional and nonfunctional requirements) and instructs users; 2) adjusts the information and records management system by making use of the system’s opportunities taking into account the approved solutions set in the normative documents of the organisation’s information and records management system (classification scheme, etc) and rules (operational procedure, etc); 3) manages the paper-based records system as a part of the general records system by choosing the most suitable tools (folders, catalogues, etc) and identifying the terms of use (opening and closing files, etc) and participates in developing the paper-based system. 	
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) the principles and methods of launching an information and records management system; 2) the basics of adjusting the information and records management system (functionality and content); 3) the principles of arranging a paper-based records system. 	
<p><u>Assessment method(s):</u> Test and a practical task</p>	

B.2.6 Ensuring drawing-up, capture and usability of documents	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) arranges properly drawing-up of documents by creating and making accessible document templates and controlling or arranging the control over properly drawing-up of the documents to be forwarded; 2) arranges or carries out checking of documents for their integrity and compliance with requirements inspecting them during the capture and registration process; inspects documents for necessary appendices, versions and statuses; 3) manages the capture and registration of documents in the process of receiving and sending out documents; at the receipt of documents via different means (e-mail, information system, incl document exchange centre, mail) arranges processing of documents before forwarding them; when sending out documents arranges addressing and forwarding via the most appropriate means; 4) ensures document usability (tracking and accessing documents in the document system according to the set access rights); tracking paper documents according to the registered data, ensuring physical access to documents in their place of storage and usability of digital documents in the information system; 5) arranges monitoring of validity and deadlines of documents by ensuring determining valid documents and their deadlines via metadata or other means; arranges timely execution by monitoring records status and deadlines via metadata or other means. 	
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) recommendations and regulations for drawing up documents; 2) requirements for document properties; 3) the principles of arranging the process of receiving and sending out documents, capturing 	

<p>techniques and the principles of registration;</p> <p>4) the principles, means and methods of ensuring the usability of different types of records;</p> <p>5) the principles and methods of arranging document version management, document status and related tasks management.</p>
<p><u>Assessment method(s):</u> Test and a practical task</p>

B.2.7 Information management in work processes	EstQF level 6
<p><u>Performance indicators:</u></p> <p>1) participates in making records management a work process, analysing work processes and activities, drafting relevant work process schemes and introducing changes into the information and records management system;</p> <p>2) monitors and manages (finishes, restarts, marks as completed or incompletd) work processes and tasks.</p>	
<p><u>Supporting knowledge:</u></p> <p>1) the principles of managing and changing work processes and the document flow;</p> <p>2) the principles and methods of preparing work process schemes;</p> <p>3) the principles of everyday management of work processes (workflows).</p>	
<p><u>Assessment method(s):</u> Test and a practical task</p>	

B.2.8 Arranging archival management	EstQF level 6
<p><u>Performance indicators:</u></p> <p>1) in order to establish and manage an organisation’s archive, analyses the content of the organisation’s comprehensive archive (incl digital archive) and archive funds; plans changes according to the principles of archival management and the requirements laid down in the normative document for managing the records life cycle (retention schedule, life cycle model or other); participates in the development and launch of the technological solution for digital archiving of records;</p> <p>2) for the purpose of arranging and describing the archive participates in determining the situation of the archive and in preparing the arrangement and description system according to the changes in the records and archival management; participates in physical arranging of the archive and preparing an archive overview (archive scheme, directory, list of archive items), participates in giving an overview of the quality of archive arrangements (item control, quality of descriptions);</p> <p>3) when destroying documents or transferring to an archiving institution, participates in carrying out an archiving assessment by using the normative documents prepared for assessing the value of documents; prepares documents which certify the destruction and transfer;</p> <p>4) for the purpose of arranging the use of archived records, prepares normative documents regulating the terms of preservation and access and monitors implementation.</p>	
<p><u>Supporting knowledge:</u></p> <p>1) the principles and the main processes of archival management;</p> <p>2) the principles of managing a traditional (i.e. paper-based) archive and peculiarities of an archive (fund, collection) consisting of film, photo or audio records;</p> <p>3) the infotechnological and organisational principles of a digital archive;</p>	

- 4) the principles of archival arrangement and description;
- 5) the principles and the process of destroying documents and transferring to an archiving institution;
- 6) the principles of using an archive;
- 7) the principles of digitisation arrangements.

Assessment method(s):

Test, a practical task, interview, portfolio

B.2.9 Training and counselling

**EstQF level
6**

Performance indicators:

- 1) determines the training needs of employees in the field of information and records managements by using observations and interviews; determines training needs resulting from changes in the records management setup (for example: takeup of a new records management system);
- 2) based on the training needs draws up a training plan and a budget for information and records management; organises trainings by inviting trainers or provides trainings to employees by himself/herself;
- 3) participates in drafting training materials and user guidelines taking into account training needs and descriptions of the records management system and processes;
- 4) gives employees practical advice on the records management issues by answering their questions and enquiries and organising information days according to the agreed purposes.

Supporting knowledge:

- 1) the principles of adult training;
- 2) the principles of organising professional specialty trainings;
- 3) the principles and didactics of drafting training materials.

Assessment method(s):

Interview and practical tasks

Transfersal competencies

B.2.10 Computer skills

EstQF level 6

Performance indicators:

- 1) uses the main functions of a computer's operational system (system software), customising one's computer for work, installing application software and utilities;
- 2) organises file and folder (catalogue) management in one's computer, computer network and web by creating effective folder (catalogue) hierarchies and dividing user rights for the resource;
- 3) when using network resources for one's and joint work, understands the main functions of these technologies in order to manage work;
- 4) uses basic and specific functions of text processing applications by preparing and modifying text documents;
- 5) uses basic and specific functions of spreadsheet processing applications by preparing and modifying documents;
- 6) uses database applications and databases by entering data, creating forms, making enquiries and producing outcomes;
- 7) uses presentation software by creating and modifying presentations;
- 8) uses basic and specific functions (calendar, tasks) of e-mail applications by connecting mail or

<p>message management with records management;</p> <p>9) applies information security principles in one's everyday and professional computer use behaviour. Detailed computer skills are laid down in Annex 2.</p>
<p><u>Supporting knowledge:</u></p> <ol style="list-style-type: none"> 1) the basic terms related to using a computer, software and network; 2) the basic functions of the computer's operational system, application software and utilities, differences in their use and their functioning principles; 3) file types, the principles of file management and the file management system in use; 4) the basics of managing one's and joint work by using network resources; 5) the principles of using text processing applications in records management; 6) database applications and the principles of their use; principles of database structure and use; 7) the data management principles in spreadsheet and database applications; 8) spreadsheet processing and database processing applications and the principles of their use in processing data; 9) the basics of using a presentation software; 10) the functioning principles of e-mail applications and mostly used social media channels; 11) the principles of information security in using a computer.
<p><u>Assessment method(s):</u></p> <p>Transfersal competences are assessed integrated with other competences described in the occupational standard.</p>

B.2.11 Communication	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) listens actively and understands arguments presented and emotions expressed by other people in an oral conversation; 2) passes information clearly and in an argued manner and gives an objective feedback; 3) notices assumptions denying facts and manipulating manners in an everyday communication and is able to react to manipulating manners knowingly; 4) establishes oneself supported by facts and verifications; 5) uses appropriate means of influence, e.g. convincing, argumentation, praising etc; 6) reacts to unexpected situations adequately; 7) works in a team and creates a team spirit; 8) manages conflict situations and solves conflicts. 	
<p><u>Assessment method(s):</u></p> <p>Transfersal competences are assessed integrated with other competences described in the occupational standard.</p>	

B.2.12 Following values and principles	EstQF level 6
<p><u>Performance indicators:</u></p> <ol style="list-style-type: none"> 1) acts based to ethical principles, also in a conflict situation and in the presence of people of various positions; 2) follows common rules and agreed principles; 3) is responsible for one's actions and the results of the actions. 	
<p><u>Assessment method(s):</u></p>	

Transfersal competences are assessed integrated with other competences described in the occupational standard.	
B.2.13 Decision-making and initiating activities	EstQF level 6
<u>Performance indicators:</u> 1) makes decisions, for decision-making gathers varied information; 2) shows initiative and self-confidence, is able to work independently.	
<u>Assessment method(s):</u> Transfersal competences are assessed integrated with other competences described in the occupational standard.	
B.2.14 Writing and preparing reports	EstQF level 6
<u>Performance indicators:</u> 1) writes clearly, cohesively, correctly, logically and in a well-structured manner; 2) presents information in a versatile manner, e.g. uses drawings, formulas, models, graphs, lists, stories, examples.	
<u>Assessment method(s):</u> Transfersal competences are assessed integrated with other competences described in the occupational standard.	
B.2.15 Analysing and interpreting	EstQF level 6
<u>Performance indicators:</u> 1) relies on facts, distinguishes opinions and suggestions from the evidence-based information; 2) makes rational conclusions based on the information and analysis available.	
<u>Assessment method(s):</u> Transfersal competences are assessed integrated with other competences described in the occupational standard.	
B.2.16 Learning and self-development	EstQF level 6
<u>Performance indicators:</u> 1) sets goals to one's self-development and develops oneself in a targeted manner; 2) gathers, systemises and uses information necessary for work and self-development; 3) learns from experience and made mistakes, evaluates, analyses and corrects; 4) is open to innovation, is able to find alternative solutions to problems and offers new original ideas; 5) sets personal short-term and long-term career targets, makes use of further development and training opportunities.	
<u>Assessment method(s):</u> Transfersal competences are assessed integrated with other competences described in the occupational standard.	

B.2.17 Achieving objectives	EstQF level 6
<u>Performance indicators:</u> 1) sets clear objectives and is able to establish work priorities; 2) plans activities and projects carefully by using time efficiently and keeping deadlines; 3) works steadily and systematically to achieve objectives.	
<u>Assessment method(s):</u> Transfersal competences are assessed integrated with other competences described in the occupational standard.	
B.2.18 Language skills	EstQF level 6
<u>Performance indicators:</u> In one's work a records manager uses Estonian at level C1 and at least one foreign language at level B2. Language skills are described in more detail in Annex 3.	
<u>Assessment method(s):</u> Transfersal competences are assessed integrated with other competences described in the occupational standard.	

Part C

GENERAL INFORMATION AND ANNEXES

C.1 Information on the preparation and approval of the occupational standard, on the body awarding occupational qualifications, and reference to the location of the occupational standard in classifications	
1. Designation of the occupational standard in the register of occupational qualifications	14-05122014-1.5/6k
2. The occupational standard is compiled by:	Veiko Berendsen, <i>University of Tartu</i> Küllli Kool, <i>AS Helmes</i> Katriin Leemet, <i>Association of Records Managers</i> Kaidi Paju, <i>Republic of Estonia Government Office</i> Katriin Roosileht, <i>University of Tartu</i> Kristi Saarsalu, <i>Association of Records Managers</i> Kersti Treulich, <i>OÜ Webware</i> Pille Vestung, <i>Bank of Estonia</i>
3. The occupational standard is approved by	Sectoral Council for Commercial Service and Other Commercial Activity
4. No. of the decision of the Sectoral Council	22
5. Date of the decision of the Sectoral Council	05.12.2014
6. The occupational standard is valid until (date)	04.12.2019
7. Occupational standard version No.	6
8. Reference to the Classification of Occupations (ISCO 08)	2422 Professionals
9. Reference to the level in the European Qualifications Framework (EQF)	6
C.2 Title of occupational qualification in foreign languages	
In English: Records Manager	
In Finnish: Asiakirjahallinnon asiantuntija	
In Russian: Документовед	
C.3 Annexes	
Annex 1 Terms connected to the professional field	
Annex 2 Computer skills	
Annex 3 Scale of language level assessment	

Terms related to the occupational standard of a records manager

Term	Description
archival management	<p>deals with assessing the value of documents and archival records, receiving records to the archive and preserving them there, archival arrangement and description of documents and archival records, keeping account of their status and amount (accounting), arranging the use of documents and archival records preserved in an archive, the destruction or transfer of documents to an archiving institution</p> <p>EN: <i>archival management</i></p> <p>source: worded for the standard</p>
arrangement and description	<p>deals with dividing documents and archival records between the archival funds, systematising and establishing folders and archival records (physical arrangement), document registers and positioning in a storage room</p> <p>EN: <i>arrangement and description</i></p> <p>source: worded for the standard</p>
accountability	<p>the principle according to which an individual, organisation or society is accountable for its action and has to explain it to others upon request</p> <p>EN: <i>accountability</i></p> <p>source: EVS-ISO 15489-1:2004</p>
public information (disclosure of information)	<p>Public information is information which is recorded and documented in any manner and on any medium and which is obtained or created upon performance of public duties provided by law or legislation issued on the basis thereof.</p> <p>EN: <i>public information</i></p> <p>source: Public Information Act § 3 (1)</p>
records management	<p>activities for establishing and managing a records system; creating and capturing documents, managing records life cycle.</p> <p>EN: <i>records management</i></p> <p>source: Webpage of the Association of Records Managers; terms</p>
records management system	<p>a technological part of a records management system for creating, capturing and managing the records life cycle.</p>

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	<p>EN: <i>records management system</i> source: Webpage of the Association of Records Managers; terms</p>
adjustment	<p>setting the system for work including substantive and technical parts like users and rights, metadata and classification scheme, screen forms, templates, work flows, etc EN: <i>adjustment</i> source: worded for the standard</p>
document type	<p>standing for documents with similar features (purpose, meaning, format) EN: <i>document type</i> source: worded for the standard</p>
document template	<p>a customised file or printed form that enables to create and draw up a document in a uniform manner EN: <i>document template</i> source: worded for the standard</p>
document register	<p>a part of a records management system which verifies the existence and capture of a document in a records system EN: <i>document register</i> source: Webpage of the Association of Records Managers; terms</p>
document flow	<p>transfer of documents in a work process EN: <i>document flow</i> source: Webpage of the Association of Records Managers; terms</p>
records system	<p>a combination of individuals, records, records management activities, technologies and relations between them. The purpose of a records system is to establish and apply procedures required for records management. EN: <i>records system</i> source: Webpage of the Association of Records Managers; terms</p>
document	<p>(1), a wider term – a representation of comprehensive information. EN: <i>document</i> (2), a narrower term - a representation of comprehensive information sufficient to serve as evidence of facts or transactions. EN: <i>record</i></p>

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	source: Webpage of the Association of Records Managers; terms
document validity	a status and time (period of validity) during which or in the status of which a document verifies or regulates something EN: <i>document validity</i> source: worded for the standard
records classification scheme	a tool for planning and managing records life cycle according to a classification scheme EN: <i>records classification scheme</i> source: Webpage of the Association of Records Managers; terms
document execution	implementing a task deriving from the content of a document or a regulation including responding to a document EN: <i>document execution</i> source: worded for the standard
drawing up documents	placing a text and other document elements on a document according to document rules (formatting rules) or custom, following the uniform format, clarity and comprehensiveness of single type documents EN: <i>drawing up documents</i> source: worded for the standard
[records] life cycle	a process which starts upon creating a document and finishes with its disposal or continues with its permanent preservation in an archive. Remark: three stages of life cycle are distinguished: I-active, II-semi-active, III-passive. EN: <i>records life cycle</i> source: Webpage of the Association of Records Managers; terms
disposition	transactions of records management during the document validity and an activity related to records disposal or transfer resolutions. EN: <i>disposition</i> separating for a transfer – <i>final disposition</i> source: Webpage of the Association of Records Managers; terms
function	a combination of activities that an organisation fulfills to achieve its goals. Remark: In a function-based classification scheme a function is the highest level of classification.

	<p>EN: <i>function</i> source: Webpage of the Association of Records Managers; terms</p>
storing / maintaining documents	<p>securing the existence and accessibility of documents. EN: <i>storing, maintaining</i> source: Webpage of the Association of Records Managers; terms</p>
capture	<p>a logical linking of a document or a record to a classification scheme or other system (taking into account the rules of procedure). EN: <i>capture</i> source: Webpage of the Association of Records Managers; terms</p>
destruction	<p>transactions during which documents are physically destroyed or deleted from the electronic system so that they are unrecoverable. EN: <i>destruction</i> source: Webpage of the Association of Records Managers; terms</p>
information management	<p>The field which deals with the analysis of information and organisational resources. It includes definitions, manners of use, value and transfer of different data and information in an organisation irrespective of the use of computers. The purpose of information management is distinguishing important data and information and the efficient use of them for securing a successful performance of an organisation. EN: <i>information management</i> source: www.vallaste.ee Remark: In English also the term <i>information governance</i> is used; the meaning of the terms is different</p>
information	<p>data put in a meaningful form or context which has a real or assumed value for the receiver EN: <i>information</i> source: Glossary of librarianship terms; National Library</p>
information resource	<p>information represented in documents created for a purposeful use in a society; in a wider sense also includes knowledge, experience and professional skills of individuals.</p>

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	<p>EN: <i>information resource</i> source: Glossary of librarianship terms; National Library</p>
information security	<p>defending information from unauthorized access, modification, inspection, recording or destruction. EN: <i>information security</i> source: <i>Wikipedia article in English</i></p>
information need	<p>need for receiving information in the course of a human activity EN: <i>information need</i> source: Glossary of librarianship terms; National Library</p>
personal data	<p>any uniquely identified data about a physical person, who is uniquely identified either directly or indirectly, representing the person's physical, mental, economic, cultural or social qualities, relationships and ethnicity. EN: <i>personal data</i> source: Personal Data Protection Act § 4 (1)</p>
access [to information, document, archival record]	<p>Access is physical and informative. Physical access is the right and opportunity to use a document or an archival record by getting it in one's hands. Informative access is the right and opportunity to get acquainted with the content of a document or an archival record. EN: <i>access</i> source: worded for the standard</p>
access control / rights	<p>an established and applied control regime EN: <i>access control / rights</i> source: worded for the standard</p>
access restriction	<p>a firm condition, normally limited in time, during which the access to information or documents is limited EN: <i>access restriction</i> source: worded for the standard</p>
user group	<p>the term of information system which defines persons, roles or other information resources, the rights and behaviour of which are handled together EN: <i>user group</i> source: worded for the standard</p>
role, user role	<p>in an information system a title given for a person or another resource, generally accompanied by</p>

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	<p>certain user rights EN: <i>role, user role</i> source: worded for the standard</p>
confidential information	<p>information to which access restrictions have been set due to its content, the disclosure of which would damage the interests of the person who the information refers to EN: <i>confidential information</i> source: worded for the standard</p>
classification	<p>identifying the context of documents and presenting it in a classification scheme. EN: <i>classification</i> source: Webpage of the Association of Records Managers; terms</p>
classification scheme	<p>a structured presentation of functions, series and records. EN: <i>classification scheme</i> source: Webpage of the Association of Records Managers; terms</p>
metadata	<p>data describing the content, quality, status, origin and other features of existing data EN: <i>metadata</i> source: Glossary of librarianship terms; National Library</p>
glossary of terms	<p>an arranged list of terms [a term is a word or word combination describing the specific context of the source of information or its part; used, for example, in a reference book as a keyword of an article in the glossary of terms, a dividing unit in a register, a keyword in a database] EN: <i>vocabulary</i> source: Glossary of librarianship terms; National Library</p>
normative document	<p>A document which regulates an activity and often legal relations, sets rules that are often regulated by acts of law EN: <i>normative document</i> (the use of the term is not widespread in English, the term <i>normative document</i> origins from Russian) source: worded for the standard</p>
process	<p>sequence of activities carried out to achieve a unique goal. EN: <i>process</i></p>

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	source: Webpage of the Association of Records Managers; terms
core and supporting functions	a division of organisation's tasks according to categories EN: <i>core and supporting functions</i> source: worded for the standard
register	the same as records register. A register also refers to a numerator used in an information system or a database for entering certain facts.
registration	controlling the integrity of an included document or record and including a reference EN: <i>registration</i> source: Webpage of the Association of Records Managers; terms
series	a tool for grouping records according to activities or transactions or other types of features (type, format, receipt, draw-up, use). Within a series records may be united into folders. EN: <i>series</i> source: Webpage of the Association of Records Managers; terms
preservation	keeping records and the activities securing retaining them. Remark: Preservation activities include, for example: establishing preservation strategies, creating suitable environment and control, selection and maintenance of storage equipment, conservation and restoration. EN: <i>preservation</i> source: Webpage of the Association of Records Managers; terms
retention schedule	multi-stage set of rules which describe at least the retention period of each document, transactions and reasons for disposition. EN: <i>retention schedule</i> source: Webpage of the Association of Records Managers; terms
retention period	the shortest time during which a record should be stored or retained. EN: <i>retention period</i> source: Webpage of the Association of Records Managers; terms
storing	storing data in a memory tool

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	<p>EN: <i>storing</i> source: Glossary of librarianship terms; National Library</p>
duty to inform	<p>A norm which obliges the information holder to disclose information publicly or notify certain persons EN: <i>duty to inform</i> source: worded for the standard</p>
activity, process	<p>a sequence of connected activities to achieve a certain aim. EN: <i>activity; process</i> source: Webpage of the Association of Records Managers; terms</p>
transaction	<p>a part of an activity or process which has an independent result. EN: <i>transaction</i> source: Webpage of the Association of Records Managers; terms</p>
task	<p>a transaction assigned to a person or a role. EN: <i>task</i> source: Webpage of the Association of Records Managers; terms</p>
value (of information, documents)	<p>a general and steady feature of a record, which is important or meaningful for a person EN: <i>value</i> source: Glossary of librarianship terms; National Library</p>
transfer	<p>replacing the document holder, document owner and/or a person responsible for a document. EN: <i>transfer</i> source: Webpage of the Association of Records Managers; terms</p>