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## Managing Electronic Records (4th ed.)

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**Keywords:** Records management, Electronic media, Retention

With *Managing Electronic Records*, William Saffady simultaneously presents the twenty-first century recordkeeping professional with a valuable asset and a puzzle.

First, to deal with the work as an asset. There can be no doubt that anyone charged with the responsibility of managing electronic records should have this book on their shelves. It deals in comprehensive detail with a wide range of issues ranging from the history of electronic records, through formats, hardware and software, to the organizational, legal and professional requirements for the management of these records.

These aspects are visible in the headings of the book's seven chapters: 1. "Concepts and issues"; 2. "Storage media for electronic recordkeeping"; 3. "File formats for electronic records"; 4. "Inventorying electronic records"; 5. "Retention schedules for electronic records"; 6. "Managing vital electronic records"; 7. "Managing electronic files and media". (Chapter 5 is perhaps mis-titled – retention schedules as such form only a subset of the far wider-ranging issues surrounding retention that are, rather illogically, located as subordinate sections.)

Chapters 1 and 2, in particular, are often quite technical in nature, with their detailing of various current and historical hardware, software, system, and media types and products. The author stresses that the terms "electronic records" and "digital records" are not interchangeable, and all types of electronic technologies are covered. The level of detail, though at first sight potentially indigestible to the non-technically minded, is in fact one of the strengths of the book. On a general level, it gives records practitioners an understanding of the nature and scale of the topic; on a practical level, it enables them to interact intelligently and knowledgeably with IT colleagues and vendors when scoping or implementing an electronic records management programme.

While many of the recordkeeping principles and methods described – records inventories and retention schedules, for example – cover familiar territory, they are elaborated in terms specific to the requirements of electronic records. To take the case of the records inventory: along with the familiar advice to study existing resources such as organization charts, Saffady points out the value of acquiring or producing a corporate IT infrastructure map to use as a starting-point for the inventory, and the necessity of including an inventory of all relevant hardware and software that have been or might be used to write, read or store records as well as of the records themselves. The latter is necessary not only because it can be a useful pointer to the types of records likely to be found, but also because it reveals the hardware and software dependencies of the records.

This emphasis on software and hardware dependencies, along with the means of addressing them, is found throughout the book: it is of particular use in the context of activities (such as compiling an inventory or drafting a retention schedule) where the unwary may be tempted into translating the "paper world" equivalent too literally – it is not enough simply to note that the organization has x thousand Word documents, or that an electronic health record needs to be kept for the life of the patient, without also documenting the technological contexts and mechanisms required for continuing access and preservation.

The author is from the USA, and many of the examples and contexts given reflect the US environment. However, this does not limit the value of the book, both because the technological context is global rather than national in nature and because in most cases (such as that of legislation affecting electronic recordkeeping) parallels can readily be found for other jurisdictions. It is true that the view taken of records management is very specific to the USA: Saffady writes that "scholarly retention criteria are beyond the scope of this book *and of records management generally*" (p. 117, emphasis added), a perspective that is indicative of the Grand Canyon that continues to exist between records and archives management in the USA, but that is far from universal. Even so, there will still be many organizations worldwide where this remains at most a minor consideration.

And now for the puzzle. The fact that this book is in its fourth edition attests to its enduring relevance; yet, while it has clearly been brought up to date, it is in some ways still anchored in the time of its original publication in 1992. Last year, I reviewed Steve Bailey's *Managing the Crowd* (also published by Facet) for this journal, and the two books seem to inhabit different worlds. Virtually the only mention by Saffady of the Web 2.0 technologies that occupy Bailey's attention for a full book appears in a comparatively breathless four pages on "Document Management and ECM" (pp. 197-200).

There is little reference to, let alone attempt to wrestle with, the increasingly fluid and problematic nature of "the record", or of working practices and cultures where the boundaries between the workplace and the personal (and between workplace and personal technologies) are becoming ever more porous. Saffady's organizational technology and RIM environments remain largely sealed from the outside world: instead of Bailey's perhaps over-pitched universe of instability and unceasing change, we are presented with one in which any change has been a matter merely of degree, with the core fundamentally undisturbed.

In a curious way, each of these books is required to complete the other: two divided halves that can only really begin to address the full spectrum of contemporary records management when brought together as a whole. Which, I suppose, is good news for Facet but not so good for the cash- and time-strapped records manager!

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