

## Improved Managing Electronic Records System

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**Abstract:** A business develops in course of time with complexities. With increasing complexities managing the business has become a difficult task. The need of existence of management has increased tremendously. Management is essential not only for business concerns but also for banks, schools, colleges, hospitals, hotels, religious bodies, charitable trusts etc. Every business unit has some objectives of its own. These objectives can be achieved with electronic management. Electronic systems become obsolete so rapidly that it is unrealistic for these systems to remain usable for the length of time that the organization will need the records that are created by them. This fact is a characteristic that distinguishes electronic records from paper records. Electronic records have to be migrated on to new systems in such a way that they can still read and understood while maintaining their integrity and authenticity. Although the technical challenges in managing electronic records are formidable, the management issues are arguably even more important. Electronic records cannot survive without active strategic intervention to migrate the records onto new systems. This process is expensive and requires the implementation of policies and procedures that affect the working practices of the entire organization. Changes requiring this level of resources and support cannot be achieved without senior management approval. In short, the systems do not address record-keeping needs comprehensively, and this can result in serious problems, including the following: poor system performance because of accumulation of unneeded data which should have been subject to disposal requirements, use of outdated information in decision-making, compromised systems security and data integrity because of uncontrolled or improper deletion of records or data, inability to perform necessary audits or management reviews.

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### I. Introduction

Although management is no common agreement among its experts and practitioners about its precise definition. As a result of unprecedented and breath-taking technological developments, business organizations have grown in size and complexity, causing consequential changes in the practice of management. Changes in management styles and practices have led to changes in management thought. Moreover, management being interdisciplinary in nature has undergone changes because of the developments in behavioural sciences, quantitative techniques, electronic and technology, etc. Since it deals with the production and distribution of goods and services, dynamism of its environments such as social, cultural and religious values, consumers' tastes and preferences, education and information explosion, democratization of governments, etc., have also led to changes in its theory and practice. Yet, a definition of management is necessary for its teaching and research, and also for improvement in its practice. Many management experts have tried to define management. But, no definition of management has been universally accepted. Let us discuss some of the leading definitions of management:

**Peter F. Drucker** defines, "management is an organ; organs can be described and defined only through their functions".

According to **Terry**, "Management is not people; it is an activity like walking, reading, swimming or running. People who perform Management can be designated as members, members of Management or executive leaders."

**Ralph C. Davis** has defined Management as, "Management is the function of executive leadership anywhere."

According to **Mc Farland**, "Management is defined for conceptual, theoretical and analytical purposes as that process by which managers create, direct, maintain and operate purposive organization through systematic, co-ordinated co-operative human effort." Henry Fayol, "To manage is to forecast and plan, to organize, to compound, to co-ordinate and to control."

**Harold Koontz** says, "Management is the art of getting things done through and within formally organized group."

Management is a vital aspect of the economic life of man, which is an organised group activity. It is considered as the indispensable institution in the modern social organization marked by scientific thought and technological

innovations. One or the other form of management is essential wherever human efforts are to be undertaken collectively to satisfy wants through some productive activity, occupation or profession. Management has achieved an enviable importance in recent times. We are all intimately associated with many kinds of organizations, the most omnipresent being the government, the school and the hospital. In fact, more and more of major social tasks are being organized on an institution basis. Medical care, education, recreation, irrigation, lighting, sanitation, etc., which typically used to be the concern of the individual or the family, are now the domain of large organizations. Although, organizations other than business do not speak of management, they all need management. It is the specific organ of all kinds of organizations since they all need to utilize their electronic resources most efficiently and effectively for the achievement of their goals. It is the most vital forces in the successful performance of all kinds of organized social activities.



Importance of management for the development of underdeveloped economies has been recognized during the last one and a half decade. There is a significant gap between the management effectiveness in developed and underdeveloped countries. It is rightly held that development is the function not only of capital, physical and material resources, but also of their optimum utilization. Effective management can produce not only more outputs of goods and services with given resources, but also expand them through better use of science and technology. A higher rate of economic growth can be attained in any country through more efficient and effective management of our business and other social organizations, even with existing physical and financial resources. That is why it is now being increasingly recognized that underdeveloped countries are indeed somewhat inadequately managed countries.

There is enough disagreement among management writers on the classification of managerial functions. Newman and Summer recognize only four functions, namely, organizing, planning, leading and controlling. Henri Fayol identifies five functions of management, viz. planning, organizing, commanding, coordinating and controlling. Luther Gulick states seven such functions under the catch word "POSDCORB" which stands for planning, organizing, staffing, directing, coordinating, reporting and budgeting. Warren Haynes and Joseph Massie classify management functions into decision-making, organizing, staffing, planning, controlling, communicating and directing. Koontz and O'Donnell divide these functions into planning organizing, staffing, directing and controlling. For our purpose, we shall designate the following six as the functions of a manager: planning, organizing, staffing, directing, coordinating and controlling.

**Planning** : Planning is the most fundamental and the most pervasive of all management functions. If people working in groups have to perform effectively, they should know in advance what is to be done, what activities they have to perform in order to do what is to be done, and when it is to be done. Planning is concerned with 'what', 'how', and 'when' of performance. It is deciding in the present about the future objectives and the courses of action for their achievement. It thus involves:

- determination of long and short-range objectives;
- development of strategies and courses of actions to be followed for the achievement of these objectives; and
- formulation of policies, procedures, and rules, etc., for the implementation of strategies, and plans.

The organizational objectives are set by top management in the context of its basic purpose and mission, environmental factors, business forecasts, and available and potential resources. These objectives are both long-range as well as short-range. They are divided into divisional, departmental, sectional and individual objectives or goals. This is followed by the development of strategies and courses of action to be followed at various levels of management and in various segments of the organization. Policies, procedures and rules provide the framework of decision making, and the method and order for the making and implementation of these decisions. Every manager performs all these planning functions, or contributes to their performance. In some organizations, particularly those which are traditionally managed and the small ones, planning are often not done deliberately and systematically but it is still done. The plans may be in the minds of their managers rather than explicitly and precisely spelt out: they may be fuzzy rather than clear but they are always there. Planning is thus the most basic function of management. It is performed in all kinds of organizations by all managers at all levels of hierarchy.

**Organizing:** Organizing involves identification of activities required for the achievement of enterprise objectives and implementation of plans; grouping of activities into jobs; assignment of these jobs and activities to departments and individuals; delegation of responsibility and authority for performance, and provision for vertical and horizontal coordination of activities. Every manager has to decide what activities have to be undertaken in his department or section for the achievement of the goals entrusted to him. Having identified the activities, he has to group identical or similar activities in order to make jobs, assign these jobs or groups of activities to his subordinates, delegate authority to them so as to enable them to make decisions and initiate action for undertaking these activities, and provide for coordination between himself and his subordinates, and among his subordinates. Organizing thus involves the following sub-functions :

- Identification of activities required for the achievement of objectives and implementation of plans.
- Grouping the activities so as to create self-contained jobs.
- Assignment of jobs to employees.
- Delegation of authority so as to enable them to perform their jobs and to command the resources needed for their performance.
- Establishment of a network of coordinating relationships. Organizing process results in a structure of the organization.

It comprises organizational positions, accompanying tasks and responsibilities, and a network of roles and authority-responsibility relationships. Organizing is thus the basic process of combining and integrating human, physical and financial resources in productive interrelationships for the achievement of enterprise objectives. It aims at combining employees and interrelated tasks in an orderly manner so that organizational work is performed in a coordinated manner, and all efforts and activities pull together in the direction of organizational goals.



**Staffing:** Staffing is a continuous and vital function of management. After the objectives have been determined, strategies, policies, programmes, procedures and rules formulated for their achievement, activities for the

implementation of strategies, policies, programmes, etc. identified and grouped into jobs, the next logical step in the management process is to procure suitable personnel for manning the jobs. Since the efficiency and effectiveness of an organization significantly depends on the quality of its personnel and since it is one of the primary functions of management to achieve qualified and trained people to fill various positions, staffing has been recognized as a distinct function of management. It comprises several subfunctions :

- Manpower planning involving determination of the number and the kind of personnel required.
- Recruitment for attracting adequate number of potential employees to seek jobs in the enterprise.
- Selection of the most suitable persons for the jobs under consideration.
- Placement, induction and orientation.
- Transfers, promotions, termination and layoff.
- Training and development of employees.

As the importance of human factor in organizational effectiveness is being increasingly recognized, staffing is gaining acceptance as a distinct function of management. It need hardly any emphasize that no organization can ever be better than its people, and managers must perform the staffing function with as much concern as any other function.

**Directing:** Directing is the function of leading the employees to perform efficiently, and contribute their optimum to the achievement of organizational objectives. Jobs assigned to subordinates have to be explained and clarified, they have to be provided guidance in job performance and they are to be motivated to contribute their 16 optimum performance with zeal and enthusiasm. The function of directing thus involves the following sub-functions:

- Communication
- Motivation
- Leadership

**Coordination:** Coordinating is the function of establishing such relationships among various parts of the organization that they all together pull in the direction of organizational objectives. It is thus the process of tying together all the organizational decisions, operations, activities and efforts so as to achieve unity of action for the accomplishment of organizational objectives. The significance of the coordinating process has been aptly highlighted by Mary Parker Follet. The manager, in her view, should ensure that he has an organization "with all its parts coordinated, so moving together in their closely knit and adjusting activities, so linking, interlocking and interrelation, that they make a working unit, which is not a congeries of separate pieces, but what I have called a functional whole or integrative unity". Coordination, as a management function, involves the following sub-functions:

- Clear definition of authority-responsibility relationships
- Unity of direction
- Unity of command
- Effective communication
- Effective leadership

**Controlling:** Controlling is the function of ensuring that the divisional, departmental, sectional and individual performances are consistent with the predetermined objectives and goals. Deviations from objectives and plans have to be identified and investigated, and correction action taken. Deviations from plans and objectives provide feedback to managers, and all other management processes including planning, organizing, staffing, directing and coordinating are continuously reviewed and modified, where necessary. Controlling implies that objectives, goals and standards of performance exist and are known to employees and their superiors. It also implies a flexible and dynamic organization which will permit changes in objectives, plans, programmes, strategies, policies, organizational design, staffing policies and practices, leadership style, communication system, etc., for it is not uncommon that employees failure to achieve predetermined standards is due to defects or shortcomings in any one or more of the above dimensions of management. Thus, controlling involves the following process :

- Measurement of performance against predetermined goals.
- Identification of deviations from these goals.
- Corrective action to rectify deviations.

It may be pointed out that although management functions have been discussed in a particular sequence-planning, organizing, staffing, directing, coordinating and controlling – they are not performed in a sequential order. Management is an integral process and it is difficult to put its functions neatly in separate boxes. Management functions tend to coalesce, and it sometimes becomes difficult to separate one from the other. For example, when a production manager is discussing work problems with one of his subordinates, it is difficult to say whether he is guiding, developing or communicating, or doing all these things simultaneously. Moreover, managers often perform more than one function simultaneously.



**Electronics Records:** the life cycle of electronic records should be planned and reflected in the design of systems that support the work of the organisation. Planning should include

- determining at what point a transaction creates a record
- defining the structural and contextual attributes of the record that the system should capture
- determining the rules for how records should be captured when performing a transaction
- identifying relevant laws, regulations, policies and standards
- incorporating the record-keeping requirements identified in laws, regulations, policies and standards, including records disposal requirements
- identifying security features that need to be included, such as the ability to restrict access to systems functions and records to appropriate staff
- ensuring that appropriate audit trails are created that will reflect accurately the history of the record's creation and use
- controlling hard copies of system inputs and outputs for entering, updating and deleting data and producing reports and so on
- determining whether any of the records may have value for purposes not directly related to their current business function
- assigning responsibility for ensuring that records are generated and captured.

**The Importance of Electronics Record:**

Standards play a key role in the management of electronic records. Until recently, most computerised systems did not contain records of long-term archival value. While there was data in these systems, the material did not need to preserve any of its structure or context. However, increasingly, computerised systems are replacing paper as the record-keeping systems of choice by many organisations. As a result, it is critical that the information technology standards being applied today are adequate to ensure the long-term preservation and use of the information contained in the systems.

Standardization plays a critical role in avoiding costs associated with changing technologies. Records professionals need to encourage awareness of the importance of relying on recognised IT standards as a preventive measure against the potentially devastating effects of hardware and software incompatibility, coupled with the rapid obsolescence of technology.



A standard is a definition or format that has been approved by a recognised standards organisation or is accepted as a *de facto* standard by the industry. One example is the Windows NT Operating System. Among other things, standards exist for programming languages, operating systems, data formats and communications protocols.

Machines that communicate in a stream of ones and zeros need conventions that arrange, classify and interpret such bits in a consistent fashion. For the most part, every digital device has the ability to do this so that images appear as intended and letters appear correctly and not as unreadable characters. However, problems often occur when one machine needs to work with another or with software meant for another. There may also be problems when information must be migrated to a new system, through a software upgrade or to another storage medium.

Records and archives managers need to collaborate with IT professionals and information officers to set standards that ensure compatibility and leave the various departments and agencies to make their own choices about hardware, software and data that will comply with these instructions. It is important to evaluate carefully and limit the number of choices of standards because too many choices means no choice at all, just chaos.

From the record-keeping perspective, one way of doing this is to list the acceptable standards for each type of file, as shown in the figure below.

Designating acceptable standards for data and document formats will enable the records programme to plan for the transfer, maintenance and migration of data and records for which they will be responsible over time. There are many more standards to consider than those included in the example above. The table shown in Figure 5 at the end of this lesson provides an initial reference to a wider variety of standards that any government should take into account. However, this list is not comprehensive, and the table provides an overview only.

The problem for the records profession is that, at present, there are a variety of standards, which in some cases are in competition with each. National archives around the world are having to make decisions about which standards to adopt based on the technical performance of the standards and an assessment of which standards are likely to be supported by the world at large. These decisions are highly technical and are usually made jointly with relevant information technology experts from the government's national computing centre. It is too early to say which standards will prove to be the most durable and widely used and this explains which at present different archival institutions have adopted different standards. Records professionals need to keep abreast with their colleagues' experiences in other institutions.

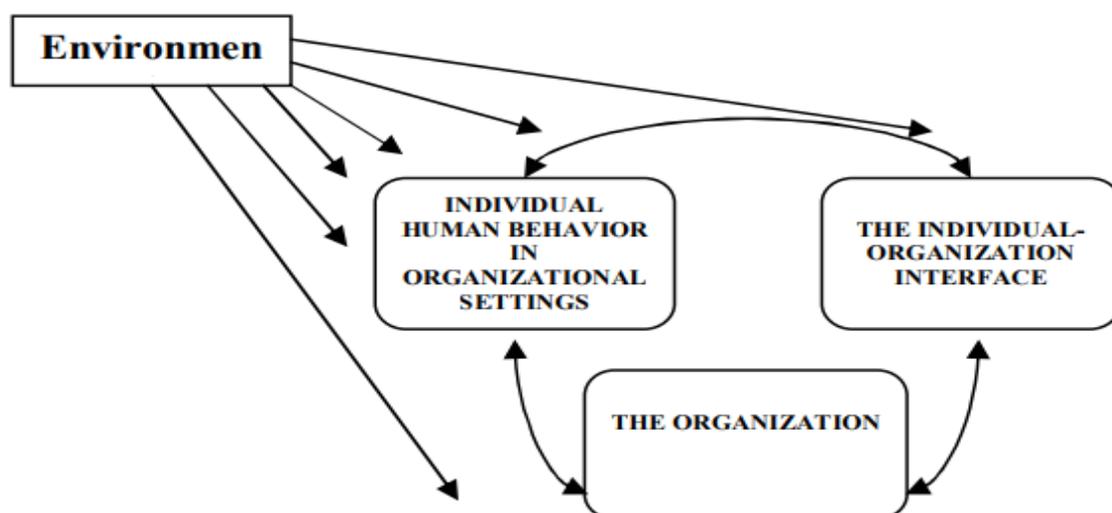


There is a danger that records professionals will be overwhelmed by the sheer number of standards that have real or potential impact on their work. Moreover, most standards were developed outside of the records profession, which means that records and archives managers are working in unknown and technically challenging territory. However, standards apply to every process during which information about records, repositories, staff or users is captured, processed or retrieved. Consequently, if records managers and archivists are to fulfill their statutory responsibilities in the future, it is essential that members of the profession should become better acquainted with the wide range of standards available.

## II. Method and Methodology

Management has been conceptualized as the social process by which managers of an enterprise integrate and coordinate its resources for the achievement of common, explicit goals. It has developed into a body of knowledge and a separate identifiable discipline during the past six decades. Practice of management as an art is, of course, as old as the organized human effort for the achievement of common goals. Management has also acquired several characteristics of profession during recent times. Large and medium-sized enterprise in India and elsewhere are managed by professional managers – managers who have little or no share in the ownership of the enterprise and look upon management as a career.

## THE NATURE OF ORGANIZATIONAL BEHAVIOR



The nature of management as a science, as art and as a profession is discussed below :

**Management as a Electronic Science:** Development of management as a electronic science is of recent origin, even though its practice is ages old. Fredrick W. Taylor was the first manager-theorist who made significant contributions to the development of management as a science. He used the scientific methods of analysis, observation and experimentation in the management of production function. A perceptive manager, as he was, he distilled certain fundamental principles and propounded the theory and principles of scientific management. His work was followed by many others including Gantt, Emerson, Fayol, Barnard, etc. During the last few decades, great strides have been made in the development of management as a systematized body of knowledge which can be learnt, taught and researched. It has also provided powerful tools of analysis, prediction and control to practicing managers. The scientific character of management has been particularly strengthened by management scientists who have developed mathematical models of decision making.

**Management as a Profession:** We often hear of professionalisation of management in our country. By a professional manager, we generally mean a manager who undertakes management as a career and is not interested in acquiring ownership share in the enterprise which he manages. But, is management a profession in the true sense of the word? or, is management a profession like the professions of law and medicine? According to McFarland a profession possess the following characteristics :

- a body of principles, techniques, skills, and specialized knowledge.
- formalized methods of acquiring training and experience.
- the establishment of a representative organization with professionalisation as its goal.

#### **Management versus Administration:**

The use of two terms management and administration has been a controversial issue in the management literature. Some writers do not see any difference between the two terms, while others maintain that administration and management are two different functions. Those who held management and administration distinct include Oliver Sheldon, Florence and Tead, Spriegel and Lansburg, etc. According to them, management is a lower-level function and is concerned primarily with the execution of policies laid down by administration. But some English authors like Brech are of the opinion that management is a wider term including administration. This controversy is discussed as under in three heads:

- Administration is concerned with the determination of policies and management with the implementation of policies. Thus, administration is a higher level function.
- Management is a generic term and includes administration.
- There is no distinction between the terms management and administration and they are used interchangeably.



**Administration is a Higher Level Function:** Oliver Shelden subscribed to the first viewpoint. According to him, "Administration is concerned with the determination of corporate policy, the coordination of finance, production and distribution, the settlement of the compass of the organization and the ultimate control of the

executive. Management proper is concerned with the execution of policy within the limits set up by administration and the employment of the organization in the particular objects before it... Administration determines the organization; management uses it. Administration defines the goals; management strives towards it". Administration refers to policy-making whereas management refers to execution of policies laid down by administration. This view is held by Tead, Spriegel and Walter. Administration is the phase of business enterprise that concerns itself with the overall determination of institutional objectives and the policies unnecessary to be followed in achieving those objectives. Administration is a determinative function; on the other hand, management is an executive function which is primarily concerned with carrying out of the broad policies laid down by the administration. Thus, administration involves broad policy-making and management involves the execution of policies laid down by the administration as shown in Table:

Basis	Administration	Management
Meaning	Administration is concerned with the formulation of objectives, plans and policies of the organization	Management means getting the work done through and with others.
Nature of work	Administration relates to the decision-making. It is a thinking function.	Management refers to execution of decisions. It is a doing function.
Decision Making	Administration determines what is to be done and when it is to be done	Management decides who shall implement the administrative decisions.
Status	Administration refers to higher levels of management	Management is relevant at lower levels in the organization.

### **Management Issues and Electronic Records**

Many people within an organisation or government have a stake in the protection of records, whether paper based or electronic. The support of these stakeholders is critical to establishing a credible electronic records programme. Their participation can help to ensure that the requirements for managing electronic records are met throughout the organisation and that important public records are not lost. Above all, these stakeholders can help to ensure that the electronic records programme is endorsed across the organisation or government, that sufficient resources are made available to support the programme and that ongoing support is provided to ensure the sustainability of the programme through time.

The need to keep electronic records for long periods makes it necessary for record-keeping requirements to be addressed at the planning and design stage of systems development, that is, before the records are created. However, more often than not record keepers are not informed of the development of new systems. There is a need to raise the profile of records management within the organisation to ensure that the records perspective is taken into consideration when new systems are designed. Records and archives professionals need to understand the management issues involved with electronic records management so that they may alert senior managers to the importance of incorporating record keeping in electronic records systems.

Computerisation makes the nature of record keeping more complex than in a paper-based environment. Many automated records systems contain information in a variety of formats saved on different storage media. This may lead to problems in accessing information electronically over time. Certain critical issues must be understood before an organisation moves from paper-based records to records in an electronic system.

- Electronic records may be needed for longer than the expected life of the systems that created them; it is dangerous to rely solely on electronic information unless there is a fully developed electronic records management capacity.
- Managing information electronically is not just a technology issue; it is also a policy issue, a business issue and a training issue.
- Reliable information, not technology, is essential to accountability.
- Collaboration between all the stakeholders is essential for the successful implementation of an integrated system.
- There is a significant difference between using a computer to produce paper records more efficiently and relying upon the computer to keep the official record electronically.
- The storage media is fragile and changes with time.
- It is essential to capture enough contextual and structural information to ensure that the record can be understood when retrieved in future.
- Changes in technology mean that records generated on computers ten years ago may not be accessible today. Records must be migrated through time and through technological changes, but there are significant costs involved with such processes.
- It is essential to assign responsibility for managing the integrity of electronic records.

The long-term accessibility of an electronic record is dependent upon technology that has yet to be invented and is therefore unknown. There is, therefore, an element of uncertainty and risk in the creation and use of electronic records.

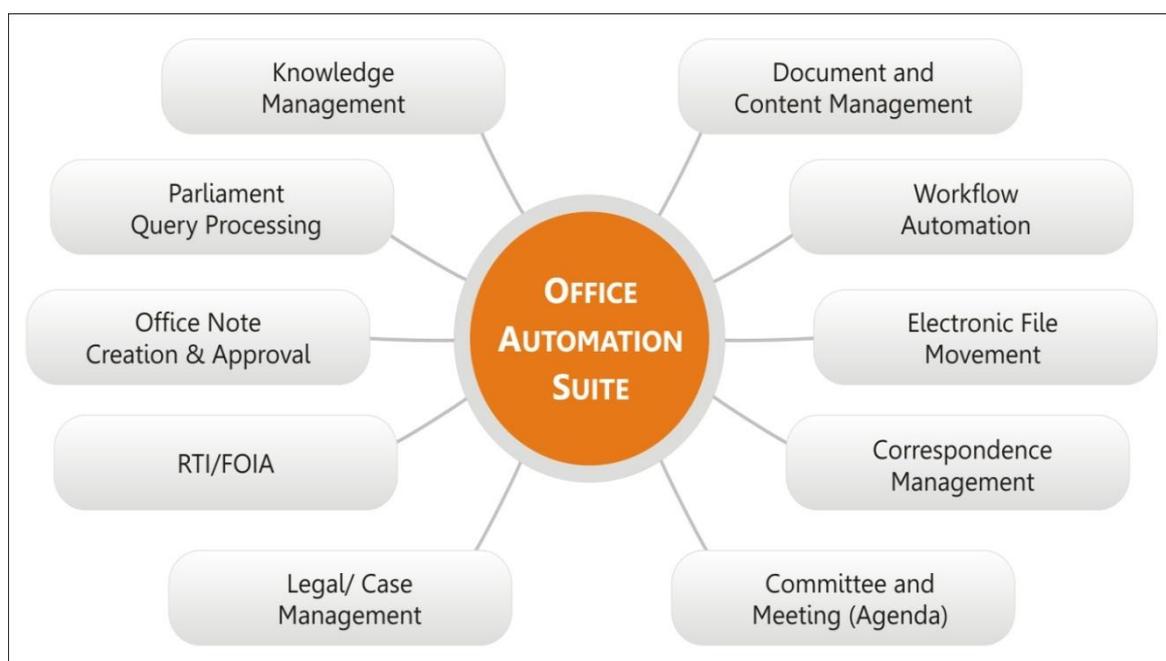
### Automating Processes versus the Electronic Office

Many organisations will choose to computerise business functions because of the significant efficiency gains automation can bring. Senior managers need to understand that there is an important difference between:

- using computers to automate a process, keeping the resulting records of the transactions as paper printouts, and
- keeping the records only in electronic formats. The distinction may appear trivial, but the long-term risks involved in keeping electronic records are high and the costs are still uncertain.

Using electronic records to document decisions or transactions needed for long-term use is a high-risk strategy. There are significant difficulties in protecting the availability of electronically generated information. Typically, problems arise in the following areas.

- Maintaining records: Electronic records are dependent upon the computer environment in which they were created.
- Managing access to and use of records: even though many current systems have password controls and audit trails, these controls are widely circumvented.
- Version control: computer records can be easily altered or amended and the changes may not be readily apparent.



There are a wide variety of options available for organisations to help them improve how they manage their electronic records. Some organisations may need to procure a sophisticated solution to help manage their records and will look to the market for a specific software solution. There are numerous commercial records systems which, provided they are successfully implemented and maintained as part of a well-managed electronic records management project, can be used to manage electronic records to required standards. For guidance on identifying a suitable electronic records system see our section on Electronic Records Management Systems. Not every organisation will be able to afford to buy in and run such a system or consider it appropriate to their circumstances. For smaller or less complex organisations in-house systems, a re-use of existing platforms, or open source applications, or a combination of these options may prove suitable. The most practical approach will be determined by a careful and realistic needs analysis.

There are, regardless of what systems approach you may choose to adopt, simple actions you can take to improve how you manage your electronic records. These include reorganising how your records are stored and disposed of, and making use of access controls, naming conventions, and version rules. These actions can all be beneficial and will help position your organisation for a later transition to a full electronic records management system. However, you need to also understand their limitations as they may not provide the level of control your organisation requires.

### Reorganising Storage

Reorganising network workspaces to improve how you create, store, amend, archive and retrieve electronic records will enhance organisation-wide information and knowledge sharing. Establishing a

hierarchical structure of folders within a file system will provide a coherent area within which records can be created and stored. If you are storing records in folders on shared drives or workspaces you can reorganise the folder structure to replicate your organisation's file plan. While your organisation may be using an existing file plan as part of a well-maintained paper records system it does not automatically follow this will provide the most appropriate structure in which to also manage your electronic records and you should evaluate your file plan's merits before adopting it.

### **Access Controls**

It is important to be aware that if you choose to store electronic records in folders on shared drives onto which no formal controls have been put in place, then your records will remain at risk of potential alteration or deletion. Access controls can be used to mitigate this risk by regulating the number of users who can create, access, edit or delete records stored in particular folders. You can also use them to restrict access to more sensitive information. Maintaining complicated access controls is resource intensive so it may be more practical to keep the folder groups to which access permissions are assigned relatively simple.

Password controls are better avoided as much as possible. Where simple passwords are used they will only provide a low level of security and if passwords are forgotten you run the risk of losing access to your records.

While access controls can provide some measure of protection, they are not a panacea. If your records are required to demonstrate evidential value and you cannot guarantee this within their electronic environment then this approach may not be appropriate for your organisation. Printing electronic records to paper to keep on a registered file in your physical record keeping system cannot be a preferred option. There is a cost attached to both printing and paper storage and you should balance this against the cost of implementing and maintaining a system which is capable of managing electronic records in their original format. Environmental considerations should also be taken into account.

## **III. Result and Discussion**

Electronics Records Management, often referred to as ERM, or the newer Records Information Management (RIM) are an essential part of a business' compliance effort. The ability to digitize records saves time, money and physical space, but it is not without its drawbacks, some of which include:

### **Stay compliant**

Many countries now require a data retention strategy as part of a large compliance effort. This is to prevent the selective destruction of important records, emails or other data that may need to be reviewed in an investigation, or the preservation of HIPAA or patient data in a medical setting. Using the right Electronic Records Management solution makes it easy to comply with local and federal laws while providing easy access to this data.

### **Electronic Records Management grew out of Physical Records Management**

A leader in physical record keeping, strengthened their understanding of offline records. As a market leader in electronic record management, Sherpa understands the entirety of the business records lifecycle, both online and off.

#### **Good for business, good for the planet**

ERM doesn't just make things easier on record keepers; Chris Wacker of ARMA asserts that a shift to ERM can also for a business and to the planet. This is a double win that saves business costs along with environmental waste.

#### **Ensure an audit trail**

ERM best practices demand unique identifiers for all records entered into your system. This allows all records to be fully traceable during data pulls, audits and investigations.

#### **Reduce time**

By ensuring records are available when needed, businesses can save valuable labor and processing time formerly spent digging through old files or searching disks.

This is a fantastic cost-saving action for any business.

#### **Version control**

Everyone in your organization accesses the most recent version of a file with the ability to see previous versions.

#### **More Security**

Your organization's ability to store secure or confidential records increases with ERM by allowing folder and file level permissions along with tracking data about who accesses what, and when.

### **Records are more shareable**

Everyone in your organization can access the same sets of records with the same unique identifiers. This prevents redundancies and saves time during cross-departmental work.

### **ERM differs from information governance**

As Denny Russell “If you take one thing away from this article, it should be this: Information governance programs are high-level, strategic initiatives which designate accountability for the management of electronic information throughout all areas of the organization. Records management programs are much more operational in scope, and are often a mechanism for achieving some of the goals defined during the IG planning.”

### **Managing your e-records is just the beginning**

Collecting and ensuring accuracy of your data is a huge step, but now it’s time for advanced search, archiving, risk assessment, and more. Sherpa Software is poised to be your partner to help you reap the full benefits from a properly configured data lifecycle.

There are numerous software solutions marketed by suppliers to help organisations improve how they manage their electronic information and carry out their business. The type of ERM solution organisation may choose to adopt should be determined by range of business activities and the types of records you want to create and share. It will also be influenced by sector and the regulatory framework within which your organisation operates. It should have a clear idea of how the solution will fit within organisation and be sure that the technical architecture meets business requirements.

## **IV. Conclusion**

The goal of a paperless office continues to get closer, due to the rising popularity of electronic document management systems. Document management systems use scanners to make digital copies of every document. These documents are coded to attach them to specific files or accounts and optical character reading systems provide insight into the contents of each page. From the time it enters the organization, the digital version of the document is stored and filed for future use.

### **Easy Access**

From the moment the document is scanned, it becomes accessible from any computer by an authorized employee. Compare this immediate access to a traditional paper file, which has to be housed in a file cabinet or room and then must be requested, retrieved and delivered to an employee. During its use that paper file cannot be accessed by another employee, nor is it easily tracked during its journey. Electronic documents can be retrieved immediately, shared and routed to any employee who needs it.

### **Searchable Text**

When a document is scanned, OCR examines the text and creates a digital version of the contents. This text is stored with the document, creating a file that can be searched by any employee. If a company needed to find every file that mentions a particular client, they could search the document database for every mention of that name. This turns ordinary files into huge databases of information that can be used for marketing, audit and management purposes.

### **Cost Savings**

The switch to electronic documents can be a tremendous cost-saving opportunity for most companies. The cost for filing cabinets, supplies and the real estate required to store them on site is substantial. If a company uses an off-site storage facility the cost to store and retrieve files is equally expensive. Add to this the cost for filing clerks and the downtime required to find specific files and the price of a manual filing system is substantial. With digital systems, there is a cost for the scanning and filing technologies, but once digitized, the cost for data storage is quite low.

### **Security**

The difficult task of securing confidential information is simplified with a digital document management system. Whereas paper files need to be stored in secure cabinets and controlled using a manual access system, electronic documents are easily encrypted with access controls using passwords and an authentication system. Electronic files never go missing, nor do they easily fall into the wrong hands.

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