

Overview

This standard is about using and maintaining documentation and information management systems for records and data. Systems can be computerised or manual or a mixture of both.

This standard can apply to any organisation that uses documentation and information management systems but in a cultural heritage organisation they may be in relation to:

- customer relationship management such as marketing, sales, ticketing or bookings for events or exhibitions
- archives, catalogues and collection management for small or large collections (including art and special collections)
- conservation-related activities including inspection, monitoring, treatments and preventive measures, and safety-related assessments and incidents
- exhibition and events documentation that ensure the archival permanence and future access of these events through adequate and representative records

This standard includes recording, storing, amending, managing, maintaining, accessing, presenting reports of records and data. It also includes evaluating and suggesting improvements to documentation and information management systems.

This standard is for those who use and maintain documentation and information management systems within different departments in an organisation. It is not for information technology experts.

Performance criteria

You must be able to:

1. use documentation and information management systems to meet the requirements of your job in accordance with organisation and legal standards
2. maintain the level of records or data required for activities
3. create new records or data and make changes to existing ones that are accurate, and which meet organisational requirements
4. maintain the structure of records or data so they meet the requirements of users and comply with organisation and legal standards
5. delete or archive unnecessary or obsolete records or data in line with organisational processes and procedures
6. manage files and make backups of computer-based records to meet requirements
7. identify confidential information and maintain information security in line with legal requirements
8. access confidential, sensitive, or restricted records or data in accordance with organisation and legal standards
9. search and present reports, records, or data in appropriate formats for user requirements
10. evaluate whether documentation and information management systems and procedures are suitable for the records and data being documented, identifying where improvements could be made
11. seek approval from appropriate people for changes to documentation and information management systems and procedures
12. implement and review developments to documentation and information systems when required in line with effectiveness and legal requirements
13. produce clear instructions, guidelines, or training for others to use documentation and information management systems when required
14. obtain specialist advice on technology and computerised systems from appropriate people when required

Knowledge and understanding

You need to know and understand:

1. the categories and format of records and data and the recording procedures required in your work, including that relating to original records and data
2. the type of information that is required to suit the purpose and structure of the documentation and information management systems with which you are working
3. the significance, potential sensitivity and future use of the records and data you make or care for
4. relevant legal requirements relating to data protection, copyright and intellectual property and the organisation's policies for data storage, handling and security
5. organisational processes, formats, procedures and standards for the access, use and management of documentation and information management systems and where to obtain information about them
6. the different procedures for creating, amending, deleting and archiving records and data including those relating to maintaining integrity
7. suitable environments for keeping different types of records and data and what constitutes a safe location
8. how documentation and information management systems interact with and work with other computerised or manual systems in the organisation
9. the effects of image size on system capacity and storage
10. necessary security measures, why they are important and the implications of a breakdown of security procedures
11. different categories of user, their requirements, restrictions to records and data and who should be given general or special access
12. how to use records and data to produce clear and concise reports, instructions and guidance
13. how to evaluate the success and suitability of a documentation and information system
14. how to research new systems or developments to existing systems and what to take into account when suggesting changes including improved effectiveness and budget
15. potential problems that may occur with documentation and management systems and how to combat them
16. how to train others in guidelines and procedures for the documentation and information systems

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17. where to get specialist advice on technology and computerised systems

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