



## Key Terms & Acronyms

### PURPOSE

The following is a list of key terms and acronyms used in Oregon State Archives (OSA) records management training and guidance. These are not formal definitions, but rather explanations of the terms as they are generally used by the OSA.

### KEY TERMS

#### *Administrative value*

The usefulness or significance of records for the day-to-day operations and management of the organization. Per statute, one of the criteria that OSA uses to determine the retention for a record series.

#### *Appraisal*

The process of evaluating records to decide their value and determine their retention period.

#### *Archive*

A physical or digital collection of permanent records.

#### *Archivist*

A person who selects, organizes, preserves, and provides access to permanently valuable public records and information in the custody of the Oregon State Archives.

#### *Classification*

The process of organizing records into categories based on their content and function to make them easier to manage and find.

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***Conditional retention***

A retention period that begins only after a specific condition or event occurs.

***Cubic Feet (c.f.)***

A standard measure for paper records on the basis of the volume of space they occupy.

***Destruction***

Permanently getting rid of records, usually by shredding, deleting, or other secure methods.

***Disposition***

The final action taken on records, either destruction or transfer to an archive, as determined during appraisal and approved by the State Archivist.

***Electronic Records***

Record information which exists within a computerized system and requires such a system to make them readable to a person. Electronic records are distinguished from system data by their specific function and use within an organization and are identified through records retention schedules.

***Electronic Recordkeeping System***

Any software system that might be used to create, store, manage, retain, etc., records. This is not a specific class of software. These could include ERMS's, but could also include other systems.

***Electronic Records Management System (ERMS)***

A specialized class of software designed to manage records across their full lifecycle.





### *File structure*

The way files are organized in a system for easy access and management.

### *Fiscal value*

The need for records to document the fulfillment of financial obligations. Per statute, one of the criteria that OSA uses to determine the retention for a record series.

### *General Records Retention Schedule*

Schedules published as Oregon Administrative Rules that provide state and local agencies with the lawful authority to destroy or otherwise dispose of commonly occurring public records.

### *Historical value*

The long-term value of records which surpasses initial business, fiscal, and legal needs. Records with historical value may document significant events, landmarks in an agency's history, or crucial decisions. Per statute, one of the criteria that OSA uses to determine the retention for a record series.

### *Inventory*

A detailed list of the types, locations, dates, volumes, equipment, classification systems, and usage data of an organization's records. Made to evaluate, appraise, and organize the information created and maintained by an organization.

### *Legal value*

The utility of records to document legal rights or obligations of the government and its citizens. They demonstrate compliance with laws, regulations, or agreements. Per statute, one of the criteria that OSA uses to determine the retention for a record series.





### ***Metadata***

The data which provides administrative, descriptive, and technical information that describes electronic records and makes them usable.

### ***Migration***

Periodic transfer of digital materials from one hardware/software configuration to another, or from one generation of computer technology to a subsequent generation.

### ***Naming Convention***

Guidelines for assigning names to files. Especially when groups of people need access to common files, naming conventions are essential for efficient retrieval.

### ***Non-records***

Non-records are all other government data that an entity collects, creates, receives, or maintains that are not public records per ORS 192.005(5)(a). Examples include reference materials, extra copies of documents, documents that are personal in nature, stocks of publications, temporary logs, etc.

### ***Oregon Administrative Rule (OAR)***

Rules developed and maintained by state agencies in order to implement statutes.

### ***Oregon Records Management Solution (ORMS)***

A statewide program associated with the Oregon State Archives that provides information management tools, training, and support for public entities in Oregon.

### ***Permanent record***

Record appraised by the Oregon State Archives as having sufficient historical or other value to warrant continued preservation by state or local government. Per statute, one of the criteria that OSA uses to determine the retention for a record series.





### *Private Records*

Records of a personal nature, belonging to an individual and have no content relevant to the organization or were not produced using resources of the organization.

### *Public record*

Any information that:

(A) Is prepared, owned, used or retained by a state agency or political subdivision;

(B) Relates to an activity, transaction or function of a state agency or political subdivision; **and**

(C) Is necessary to satisfy the legal, administrative, fiscal, tribal cultural or historical policies, requirements or needs of the state agency or political subdivision. (ORS 192.005(5)(a))

### *Record Copy*

The single copy of a document, often the original, that is designated as the official copy for retention, reference and preservation in compliance with legal, regulatory, or organizational requirements.

### *Record Series*

A group of related records that are filed and used together as a unit and therefore are evaluated as a unit for retention purposes.

### *Records Center*

The State Records Center is a warehouse managed by the Oregon State Archives that accepts non-permanent records from Oregon state agencies after they are no longer needed for day-to-day business but must still be retained to meet their assigned retention requirements.

### *Records Lifecycle*

The four basic phases that all records progress through: creation, active use, inactive storage, and disposition.



### ***Records Management***

The planning, controlling, organizing, training, promoting, and other managerial activities related to the creation, maintenance, use, and disposition of records.

### ***Records Management Analyst***

A representative of the Secretary of State Archives Division, who works with all state and local government entities on a wide range of information and records management issues relating to public records.

### ***Records Officer***

The Records Officer is a designated individual responsible for overseeing the proper management of records within an agency and serves as the key liaison between the agency and the Archives Division. All state agencies are required to designate a records officer per ORS 192.105(2)(a), but all public entities, regardless of size, should designate someone to perform the function.

### ***Records Retention Schedule***

An approved list of all records which a given type of government entity regularly manages. Records Retention Schedules outline how long records must be kept and whether they must be destroyed or preserved. It is designed to meet legal, fiscal, administrative, tribal cultural, and historical requirements.

### ***Retention***

The length of time records must be kept for administrative, legal, fiscal, historical, tribal cultural, or other purposes.

### ***Secure destruction***

The process of permanently disposing of records in a manner that ensures information is completely unreadable and unrecoverable. Methods vary depending upon the format of the records.





### ***Special Records Retention Schedule***

Covers the records which are unique to a particular state agency.

### ***Standard retention***

A fixed period during which a record must be retained, typically measured from the date the record is created.

### ***State Archivist***

The chief official responsible for overseeing the Oregon State Archives, ensuring the proper administration, preservation, and accessibility of the state's public records. The State Archivist approves all records retention schedules and state agency records management policies.

### ***System of Record***

The designated electronic storage location for the official record copies of any given series of records

### ***Tribal cultural value***

The ongoing value of records to the tribal governments in Oregon. Records with tribal cultural value preserve aspects of the heritage, identity, and traditions of tribes in Oregon. Determination of tribal cultural value is made by tribal representatives and agency tribal liaisons. Per statute, one of the criteria that OSA uses to determine the retention for a record series.

### ***Vital records***

Records an agency must have to perform to continue operating during or after an emergency; sometimes referred to as "essential records".





## **ACRONYMS**

CM – Content Manager

ERMS – Electronic Records Management System

OAR – Oregon Administrative Rule

ORMS – Oregon Records Management Solution

ORS – Oregon Revised Statutes

OSA – Oregon State Archives

RM – Records Management

RMA – Records Management Analyst

RO – Records Officer

SOR – System of Record

SOS – Secretary of State

SRC – State Records Center

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