



Records Management Glossary of Terms

This glossary provides definitions for many of the archival and records management terms found on this website. Note that definitions are specific to the Smithsonian Institution. For additional terms and definitions, consult the Glossary of Records and Archival Terminology [link to <http://www.archivists.org/glossary/>] published by the Society of American Archivists.

Accession: The process of adding records to the archives by giving them unique control numbers. The records are cataloged and become a permanent part of the collections.

Active Records: Records that are regularly used for the conduct of the current business of their creator, and therefore, continue to be maintained in office spaces (also called current or working records).

Appraisal: The process of evaluating the value of records and determining which records to retain, discard, or destroy.

Archives: (1) The permanently valuable non-current (inactive) records of the museum preserved because of their continuing value. Archives assume many forms, including electronic records and audiovisual materials. (2) The repository where archival records are housed.

Archivist: An individual responsible for the appraising, acquiring, arranging, describing, preserving, and providing access to records of enduring value.

Central Files: The files of several individuals consolidated into a common filing system, generally organized according to a file plan.

Controlled Vocabulary: A limited set of terms and phrases used to define the files.

Destroy: The process of obliterating information that is no longer of value but remains too sensitive to be simply discarded as trash. Most often, records that need to be destroyed contain Social Security numbers, credit card numbers, or other personally identifiable information. For paper records and electronic records stored on removable media, the most common method of destruction is shredding.

Discard: The process of physically doing away with records that are no longer of value and *do not* contain any sensitive information and/or personally identifiable information. These records can be disposed of in the trash or recycling.



Disposition: Instructions for the maintenance or transfer of records once they become inactive, or when all administrative, fiscal, and legal obligations are met.

Disposition Schedule: Instructions governing retention and disposition of current and noncurrent recurring records series of an organization or agency.

File Management: Oversight of the administration of activities relating to the creation, use, maintenance, and disposal of files in order to ensure that the operations are efficient and economical.

File Plan: A written procedure and set of guidelines for organizing files based upon a specific system, such as alphabetic, numeric, subject, functional, etc.

Finding Aid: A published or unpublished guide, inventory, index, register, list, or other system for retrieving archival primary source materials that provides a more detailed description than is customary in a library catalog record.

Inactive Records: Records no longer required by an office or individual in the daily conduct of business. These records may be transferred to the Archives, discarded, or destroyed according to the office's records disposition schedule or in consultation with an archivist.

Life Cycle: The phases of a record's existence from creation to final disposition.

Office of Record: The office responsible for maintaining the most complete set of a particular records series.

Permanent Records: Records of enduring, historical, or research value that are retained permanently in an office or in the Archives after a period of active use (also called archival records).

Record: Recorded information, regardless of medium or characteristics, created, received, and maintained by an organization or person.

Records Center: A records storage facility established to provide storage of inactive, temporary records.

Records Management: The systematic control of records throughout their life cycle.



Records Series: File units or documents that are kept together because they relate to a particular subject or function; result from the same activity; document a specific type of transaction; take a particular physical form; or have some other relationship arising out of their creation, receipt, maintenance, or use.

Temporary Records: Records of limited administrative value that are maintained in an office and/or in the Records Center for a specified period before destruction (also called non-archival records).

Weeding: The process of identifying and removing unwanted materials from a larger body of materials (also called purging or culling).