



Management systems for records — Why use one?

All organizations, large or small, whether in business or government, create documentation as part of their normal activities.

It is important for organizations to keep records of their decision making processes and maintain a documented trail of actions taken. This is good practice which can aid efficiency, help to manage risk and nurture repeat business. Also, when faced with litigation or investigations, it allows organizations to retrieve information so they can ascertain which decisions and actions were taken and why.

As the transition from paper to digital format becomes inevitable for most organizations, it is more important than ever for them to implement a management system for records (MSR).

The ISO 30300 series constitutes a reference point for information management and for the creation and control of documents, establishing requirements for:

- policy and procedures;
- definitions of roles and responsibilities;
- design and implementation of the MSR;
- evaluation of performance and how to improve.

ISO 30300, *Fundamentals and vocabulary*, and **ISO 30301, *Requirements***, have been widely adopted since their publication. It is envisaged that the forthcoming **ISO 30302, *Guidelines for implementation***, will be equally well received.

How does the ISO 30300 series relate to other management system standards?

This series has been developed to be compatible with, and to complement, other management system standards. It helps organizations meet the documentation requirements specified in such standards as ISO 9001, ISO 14001 and ISO 27001.

ISO 30300:2011

Fundamentals and vocabulary

- Establishes the fundamentals of a MSR and includes all the necessary terminology to facilitate the application of the management system requirements
- Key features:
 - Sets out the relationship between MSR and management systems
 - Identifies the need for and principles of a MSR
 - Gives approach to MSR processes
 - Defines the role of senior management
 - Terms and definitions

ISO 30301:2011

Requirements

- Specifies requirements for establishing, implementing, maintaining and improving a MSR, offering methodologies which help decision making and assigning resources to reach those objectives for the organization
- Key features:
 - Management system for documents
 - Leadership and planning
 - Support and operation
 - Evaluation of performance of the MSR
 - Improvement

ISO 30302

Guidelines for implementation

- Gives guidance for the implementation of a MSR in accordance with ISO 30301
- To be used in conjunction with ISO 30300 and ISO 30301
- Describes the activities to be undertaken when designing and implementing a MSR
- Intended to be used by any organization implementing a MSR
- Applicable to all types of organization that wishes to:
 - establish, implement, maintain and improve a MSR to support its business
 - assure itself of conformity with its stated records policy
 - demonstrate conformity with ISO 30301

Who might use the ISO 30300 series?

Any public or private organization, independent of its size or sector, would benefit from implementing the ISO 30300 series. The standards are particularly useful for people responsible for implementing management systems within their organization, as well as other professionals involved in management, documentation, auditing, technology and information security.