



File Management : Training

What are your top tips for managing electronic files?

- 1 Retain and dispose of electronic records according to established records retention schedules. Particularly identify files that are no longer needed or scheduled for destruction and delete them as appropriate for legal and storage considerations.
- 2 Use file names and folder names that are descriptive and indicative of the content of the files in order to facilitate retrieval by you or others in the future.
- 3 Consider creating a file folder structure, which will allow quick retrieval and a contextual view of all the files that are related to a particular topic and subtopics.
- 4 Make sure that your files on your network and/or hard drives are being backed up. Learn what your office policies are and if you are responsible for your own back up.
- 5 Remember that the security of your files cannot be ensured. Use caution when storing and handling confidential or sensitive documents.
- 6 Be aware of when you are the keeper of the record copy of a document and the responsibilities which that entails.
- 7 Generally, only keep drafts or multiple versions of a file when they are needed to document the creative process. When working with drafts, it is a good idea to add the date of change and/or your initials to the file name in order to make it easier to identify which version is the most recent.
- 8 Think carefully about the best place to maintain and backup your files. This decision may be based upon the frequency which you need to access the files or if access is needed from multiple locations or by multiple people.
- 9 University sponsored computers and software are intended for university business. Use them only sparingly for personal reasons.
- 10 If you don't have a records retention schedule, your schedule is out of date, or you don't know how to manage your files, contact the University Archives and Records Service for more information. At Duke contact the University Records Manager at 919-684-6181 or visit the records management website. At UNC contact the Records Services Coordinator at 919-962-6402 or visit the University Archives and Records Management website.

Where can I learn more about records management?

Your University Records Officer can help you with:

- Records Retention Guidelines - The University Records officer will work with your office to establish records retention guidelines that help staff manage paper and electronic files at the end of their life cycle.

- Educational seminars and workshops
- On-site consultation and advice - On-site visits to your office by the University Records officer can address these questions:
 - _ What is the best way to organize or manage the information for which you are responsible?
 - _ What can I do about my overflowing email inbox?
 - _ Are records at the end of their life cycle taking up valuable office space?
 - _ Are you new to your job and trying to organize paper and electronic files into a logical structure?
 - _ Are you worried about the potential liability created when unneeded information is retained too long?
 - _ Do you retain records and information "just in case"?

At Duke: Visit the Records Management Program's website or call 919-684-6181.

At UNC: Visit the University Archives and Records Service website or call 919-962-6402.