



Top Tips for Government Agencies Working with Electronic Records

In recognition of Electronic Records Day 2014, here is a list of reasons why everyone should be thinking more about electronic records.

- **Consult your records retention schedule:** Know what retention periods have been approved (both minimum and maximum) and take appropriate actions (e.g. transfer to Records Management.) when the retention period for your records has been met.
- **Plan ahead in ERM system design:** Talk to an archivist, records manager, and other stakeholders; determine the possibilities for system adherence to retention and disposition guidelines.
- **You've got to have standards:** Ensure you have a trusted system and that your records are authentic (see ISO 15489, ISO 16363, DoD5015.02, metadata standards, etc).
- **Organization is key:** Who's in charge of the shared file? Are people using email as a filing cabinet rather than a communication tool? Which copy is the record copy?
- **Make the rules:** Naming conventions, file organization, and disposition strategies all help now and in the long term. Make the rules known and follow them.
- **Do you have backup?** Does your backup system work? How well will it actually restore your e-records? Can you retrieve individual items? Consider off-site storage.
- **Understand metadata:** It's data about your data (and helps your records live long and prosper).
- **Keep the content, context, and structure:** How can you keep all three of these characteristics viable for your records? Hint: metadata helps!
- **Do you have built-in strategies?** Can you migrate your e-records? Transfer them to Records Management or archives?
- **Does delete mean delete?** E-records proliferate easily. Do you have a plan to manage deletion of all copies that *should* be deleted? E-discovery will include all files.
- **Think before you scan:** Standards, worthiness, naming conventions, storage, and retrieval (among other things) should be considered before you turn that scanner on for the most efficient and useful results.