

# Managing Your Electronic Records

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# Duke University Archives

- Official repository for records of Duke University
- Identify, acquire, manage, and preserve **university records of enduring value** and make them available for use
  - Records Management Program
- University records document the **history** and **business** of Duke University

# Records Management at Duke

- Improves business efficiency through cost and time reduction
- Protects sensitive data
- Supports compliance with federal and legal requirements
- Preserves Duke history for scholarship and research



# University Documentation

- **Historical Records**
  - Permanent
  - Eligible for transfer to the Archives
- **Temporary, Inactive Records**
  - Should be retained for appropriate retention period
  - Not eligible for transfer to the Archives
- **Non-records**
  - Drafts, reprints, non-university material
  - Can be destroyed when no longer needed

## What Are Examples of Historical Records?

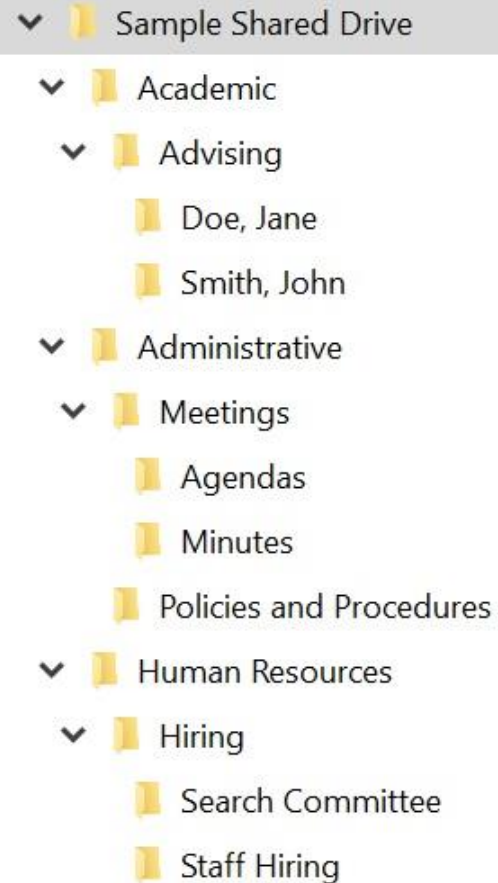
- **Correspondence** of director/dean/chair
- **Duke publications** produced by your office, including **brochures, newsletters, flyers**
- Records of **program development**
- Departmental and committee **minutes**
- Records about **special events** or projects
- **Photographs** and audio-visual material
- Websites, blogs, and **electronic records**

## Electronic Records

- Duke employees create electronic university records every day!
- University Archives recommends storing electronic records in a Shared Drive or equivalent, such as Box
  - Allows for central storage, easier use, and better business continuity

# Organizing Your Shared Drive

- Create a folder structure
  - Consider function and workflow
  - Limit folder levels



# Organizing Your Shared Drive

- Use a consistent file naming convention

TopicDateVersion

MeetingMinutes2-3-2020Final

DateTopicVersion

2020-2-3InvoiceDraft

Document your decisions!!!



# Cleaning Out Your Shared Drive

- Review your electronic records
  - Dealing with legacy records
- University records retention:  
<https://library.duke.edu/rubenstein/uarchives/recordsmanagement/retentionguidelines>



## Cleaning Out Your Shared Drive

- Transfer historical records to the Archives
  - Contact Records Manager to begin process
  - Records will be copied directly from shared drive.
  - No records are deleted during this process.

# Cleaning Out Your Shared Drive

- Purge non-records and eligible temporary records
- Concerned about deleting?
  - Create a **To Be Deleted** folder to stage records



## Other Electronic Storage

- Home Drive
  - Historical records will need to be transferred to shared drive or Box
- Email
  - Archives will appraise email for value
  - Not all email is a record
- Box
  - Archives has a transfer process in place for files in Box
- Google Drive
  - Archives can discuss options with you.

Questions?

- Contact the Records Management Program at [hillary.gatlin@duke.edu](mailto:hillary.gatlin@duke.edu).
- Visit us online: [University Archives](#) and [Records Retention Guidelines](#)