Tips for Creating and Managing Your Digital Records

The following tips and strategies are based on established best practices for the creation and management of digital records and are intended to both make your job easier and to help ensure that your digital files remain accessible and readily understood by others in the future.

Creating Records:

- **File names** should provide context and meaning by identifying the type of information the file contains; what version number it is, if applicable (e.g., to identify drafts and revisions); and when it was created (preferably using *yyyymmdd* standard). File names should be sufficiently descriptive to be understood independent of the folder in which the files were originally maintained.
  - ➢ e.g., "gfpcommission_minutes_20140113.docx" rather than "minutes.docx" or "gfp.docx"

- Take advantage of **tagging** capabilities for embedding basic metadata within documents.
  - ➢ e.g., title, creator, and subject fields in PDF and MS Word document properties.

Organizing Records:

- Treat your computer like a filing cabinet for paper records by creating and organizing **directories/subdirectories** like you would traditional drawers or folders.

- Keep **record series** (groups of functionally-related records) in separate folders to facilitate compliance with retention/destruction requirements.
  - ➢ e.g., correspondence vs. minutes vs. reports vs. project files

- No matter now you choose to organize your files (by subject, chronologically, alphabetically, etc.), do so **consistently**.

Maintaining Records:

- Whenever possible, convert files to **open (non-proprietary) formats** that do not require a specific software program to access.
  - ➢ e.g., MS Word → PDF/A; MS Excel/Access → TXT
  - ➢ For guidance on specific file formats, please contact the State Archives or visit our Preservation Rules webpage: http://history.sd.gov//archives/Data/digital/preservationrules.aspx

- Store files with long-term value on a **shared network drive (N:)** rather than on your personal drive (H:) so that they are routinely backed up and remain accessible to others.

- Avoid saving files to **external storage media** like CDs, flash drives, and floppy disks for anything other than transfer or temporary use. Such media are prone to failure and are not reliable for long-term storage.

Records Retention and Destruction

- Records **retention and destruction schedules** should be applied to digital records just as they are to paper records.
  - ➢ Current record schedules are available online: http://intranet.boa.sd.gov/records.htm

- Regularly, but carefully, delete "**non-records**" such as duplicates, working notes, and drafts.

- Transfer **records with long-term value** to the State Archives using the government records drop-box or other previously agreed upon method.
  - ➢ Government Records Drop-box: http://history.sd.gov/Archives/GovDocs/Dropbox.aspx

For questions or additional information about digital records, contact Sara Casper (sara.casper@state.sd.us), Chelle Somsen (chelle.somsen@state.sd.us), or call the South Dakota State Archives at (605) 773-3804