Records Management Support Group

Jess Todd

416-585-4562

jess.todd@vicu.utoronto.ca

VICTORIA UNIVERSITY
IN THE UNIVERSITY OF TORONTO

Agenda

Support Group Aims

New Tip Sheets and Forms

Electronic Records

Best Practices

Resources

Discussion

Support Group

Support Group Aims:

- Raise awareness and provide helpful tips about the Records Management program at Victoria

- Get people talking about their Records Management concerns and questions – we're all in this together!

- Support each other and share ways to solve Records Management challenges

Tip Sheets and Forms

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What's New?

- Records Destruction
  - Tip sheet and form
- Naming Conventions
  - Tip sheet

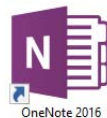What's coming up? Ability to easily transfer electronic records!

Photographer: Unknown
Construction of Emmanuel College, 1930
1991.161/547
Victoria University Archives

Electronic Records

What is a Record?

- In our Policy a University record is defined as, "any recorded information, regardless of format, created, received, or maintained by University academic, administrative, and governing bodies in order to support legal obligations or other University business operations and transactions."
- Physical format is irrelevant.
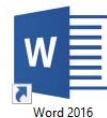- A record is created/received/maintained during regular business transactions.

Electronic Records

Records Management Challenges

- Complex and proprietary file formats
  - ➢ Email, presentations, PDF, Word, spreadsheets, audio, images, databases, social media, etc…
- Authenticity
  - ➢ Record is what it claims to be
- Integrity
  - ➢ Record remains complete and free of damage
- Access
  - ➢ Record remains accessible over time

Digital records are **more fragile than paper** given how easy it is to modify, delete, share, and create copies.

OneNote 2016   Outlook 2016   PowerPoint 2016   Publisher 2016   Word 2016   Excel 2016

Best Practices: Naming

Do this for files and folders
- Keep short
- Use dates
- Use version control
- Embed path and file title in documents

Be consistent!
- Align paper and electronic files
- Document (create an official naming convention), train, and enforce

Any consistently applied naming convention **is better than none** or one that's used inconsistently!

Best Practices: Organization
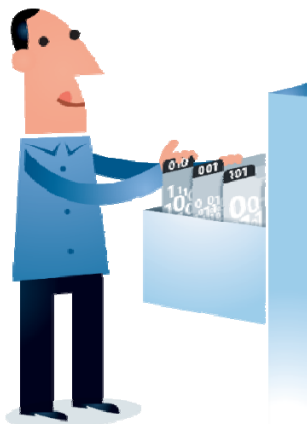
Do this for files and folders

- Order naming elements for easy access
- Limit your folder structure to 3 folders deep
- Avoid repetition
- Be consistent! Document, train, enforce

Do consider appropriate storage

- O drive/OneDrive: personal
- I drive: work to share within your office
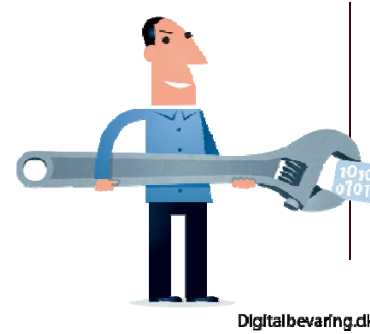- Your office may have other storage repositories!

Avoid storing records to your desktop or C drive!
This storage is NOT backed up and is INACCESSIBLE to others who may depend on your work to do their own.

Digitalbevaring.dk

Resources

Records Management at Victoria
http://library.vicu.utoronto.ca/archives/records_management

Example Server Map

Additional Electronic Records Guidance

- UTARMS
  https://utarms.library.utoronto.ca/records-management

- YORK
  https://ipo.info.yorku.ca/tool-and-tips/organizing-and-maintaining-shared-drives/

- RYERSON
  https://www.ryerson.ca/gcbs/what-we-do/records/records-resources/records-tips-2/

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Discussion:
What's Next?

Other topics for discussion?

- Legal
- Privacy
- Archives
- Digitization
- Disposition
- Succession planning

What challenges are you experiencing with managing electronic records?

Follow-Up: Tell one person about this support group!

Jess Todd
Records Manager/Archivist
416-585-4562 | jess.todd@vicu.utoronto.ca

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