

Electronic Document Management



Hampton
VIRGINIA

Records Management

April 14, 2009

You're Here Because...



- ✦ Work with a Computer
- ✦ May have difficulty retrieving information
- ✦ Would like to develop better business practices
- ✦ Would like to learn

Agenda



What is an Electronic Document

Structuring Storage

Making Retrieval Simple

Questions?

Electronic Documents...



- ✦ What is an Electronic Document?
 - ✦ Format not important
- ✦ Other storage
- ✦ Other devices
- ✦ Our Duty



What is an Electronic Document

Format not Important

"Public record" or "record" means recorded information that documents a transaction or activity by or with any public officer, agency or employee of an agency. Regardless of physical form or characteristic, the recorded information is a public record if it is produced, collected, received or retained in pursuance of law or in connection with the transaction of public business. The medium upon which such information is recorded has no bearing on the determination of whether the recording is a public record.

Code of Virginia, Title 42.1 Chapter 7
Virginia Public Records Act

Other Storage/Devices...



✦ Other storage

- ✦ CD, DVD, Thumb Drive

✦ Other devices

- ✦ Cell phone, Blackberry, PDA

Our Duty



+ Our Duty

- + Preservation, maintenance and accessibility
- + Includes converting and migrating

+ Source: The Virginia Public Records Act, *Code of Virginia*, Section 42.1-85

Electronic Records Mgmt



- ✦ Electronic Documents are Records
 - ✦ Records Retention Requirements Apply
 - ✦ Reporting Requirements Apply

Structuring Storage



- ✚ Folders are your friend
- ✚ What's in a Name

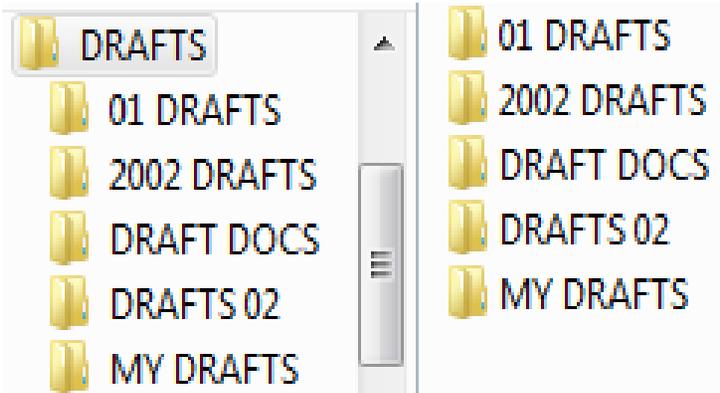
Folders are Your Friend



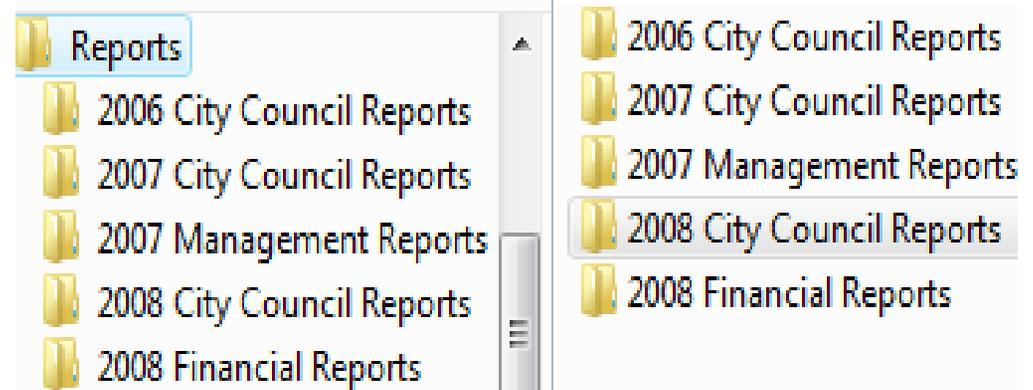
- ✦ Folders are your friend
 - ✦ Use them!
 - ✦ Use them effectively
 - ✦ Use Meaningful Names

Which would you rather see?

This...



Or This...



What do you Need?

- ✦ Tools for Planning
 - ✦ You
 - ✦ Your boss, colleagues, staff
 - ✦ Parameters of folder naming
 - ✦ What does the format allow
 - ✦ How to structure in YOUR dept

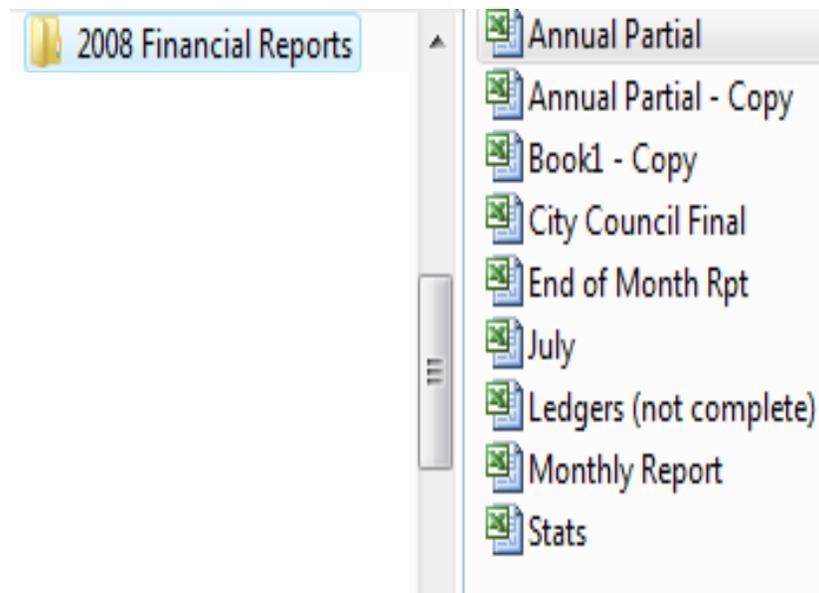
Naming Conventions



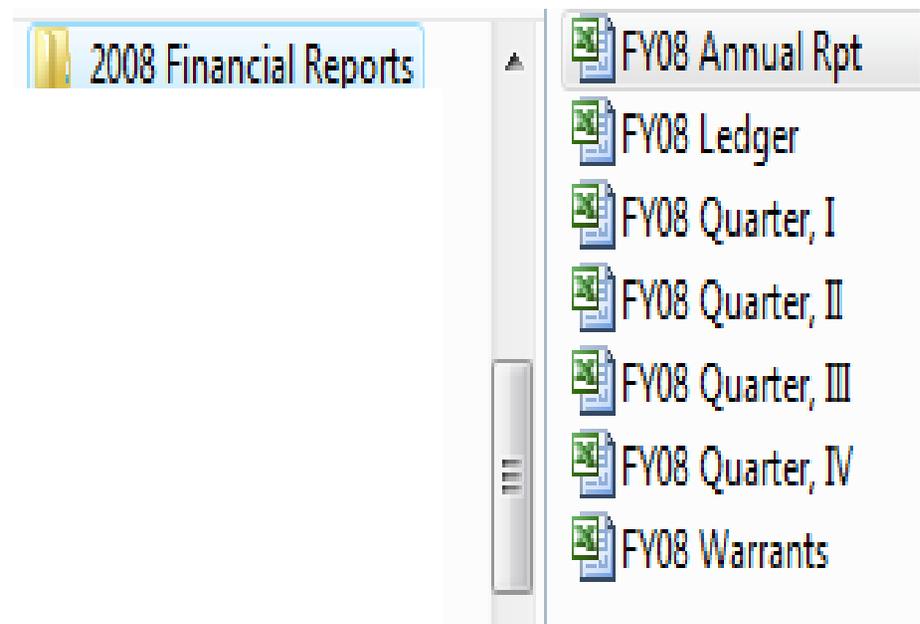
- ✦ What and Why
- ✦ We have them!
 - ✦ Appendix G and A in the Records Management Manual
- ✦ Meet the City's Requirements

Which would you rather see?

This...



Or This...



What do you Need?

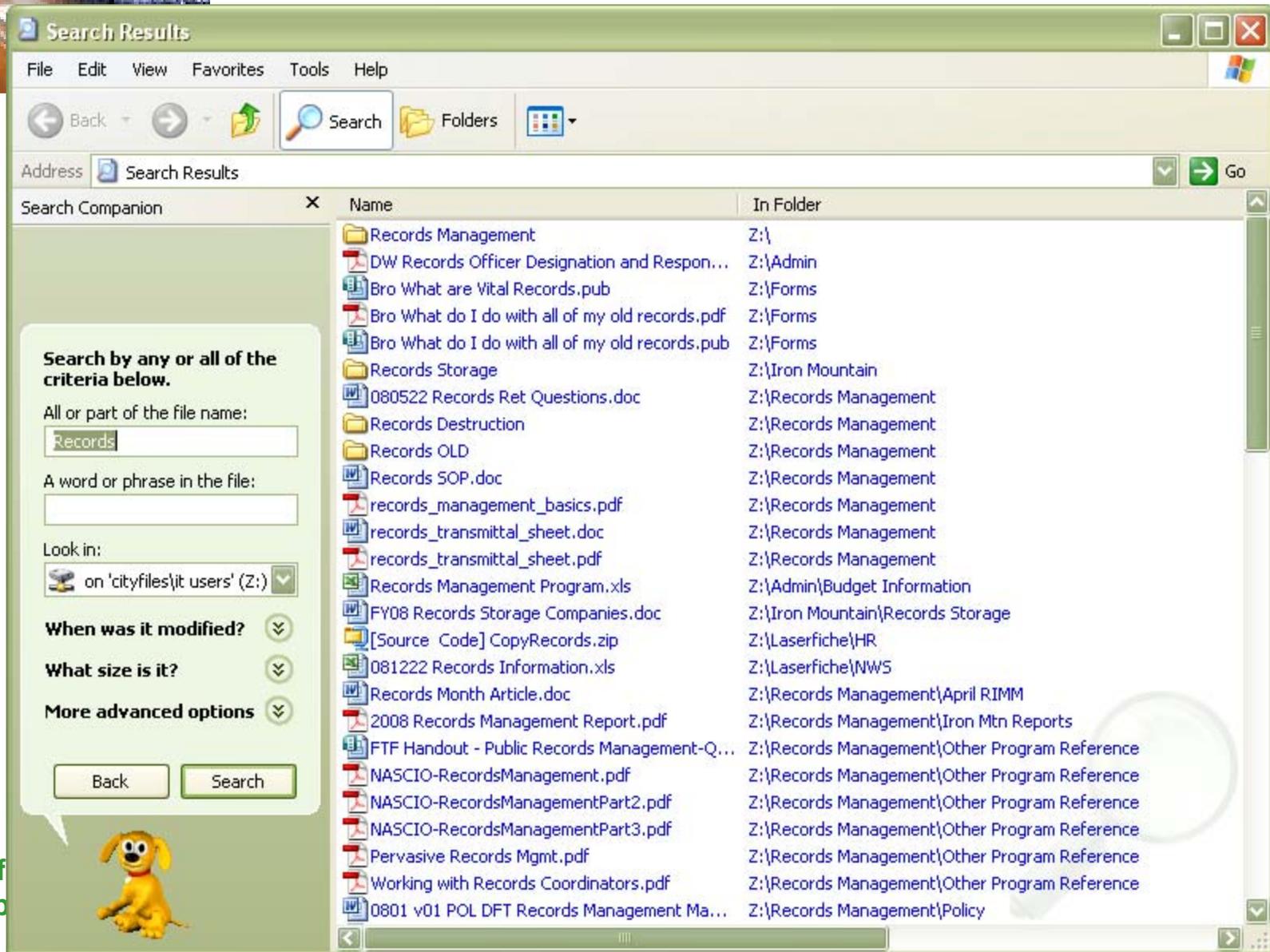
- ✦ Tools for Naming
 - ✦ How is business conducted?
 - ✦ Parameters of document naming
 - ✦ City's Requirements
 - ✦ What does the format allow
 - ✦ What is the best name?



Making Retrieval Simple

- ✦ Using the Folder Structure
- ✦ Searching by Name and/or Content
- ✦ Using Metadata (when available)

Document Retrieval



The screenshot shows a Windows Search Results window with the following details:

- Address Bar:** Search Results
- Search Companion:** Search by any or all of the criteria below.
 - All or part of the file name:
 - A word or phrase in the file:
 - Look in: on 'cityfiles\it users' (Z:)
 - When was it modified? [Dropdown]
 - What size is it? [Dropdown]
 - More advanced options [Dropdown]
 - Buttons: Back, Search
- Search Results Table:**

Name	In Folder
Records Management	Z:\
DW Records Officer Designation and Respon...	Z:\Admin
Bro What are Vital Records.pub	Z:\Forms
Bro What do I do with all of my old records.pdf	Z:\Forms
Bro What do I do with all of my old records.pub	Z:\Forms
Records Storage	Z:\Iron Mountain
080522 Records Ret Questions.doc	Z:\Records Management
Records Destruction	Z:\Records Management
Records OLD	Z:\Records Management
Records SOP.doc	Z:\Records Management
records_management_basics.pdf	Z:\Records Management
records_transmittal_sheet.doc	Z:\Records Management
records_transmittal_sheet.pdf	Z:\Records Management
Records Management Program.xls	Z:\Admin\Budget Information
FY08 Records Storage Companies.doc	Z:\Iron Mountain\Records Storage
[Source Code] CopyRecords.zip	Z:\Laserfiche\HR
081222 Records Information.xls	Z:\Laserfiche\NWS
Records Month Article.doc	Z:\Records Management\April RIMM
2008 Records Management Report.pdf	Z:\Records Management\Iron Mtn Reports
FTF Handout - Public Records Management-Q...	Z:\Records Management\Other Program Reference
NASCIO-RecordsManagement.pdf	Z:\Records Management\Other Program Reference
NASCIO-RecordsManagementPart2.pdf	Z:\Records Management\Other Program Reference
NASCIO-RecordsManagementPart3.pdf	Z:\Records Management\Other Program Reference
Pervasive Records Mgmt.pdf	Z:\Records Management\Other Program Reference
Working with Records Coordinators.pdf	Z:\Records Management\Other Program Reference
0801 v01 POL DFT Records Management Ma...	Z:\Records Management\Policy

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Using Metadata



■ What is Metadata?

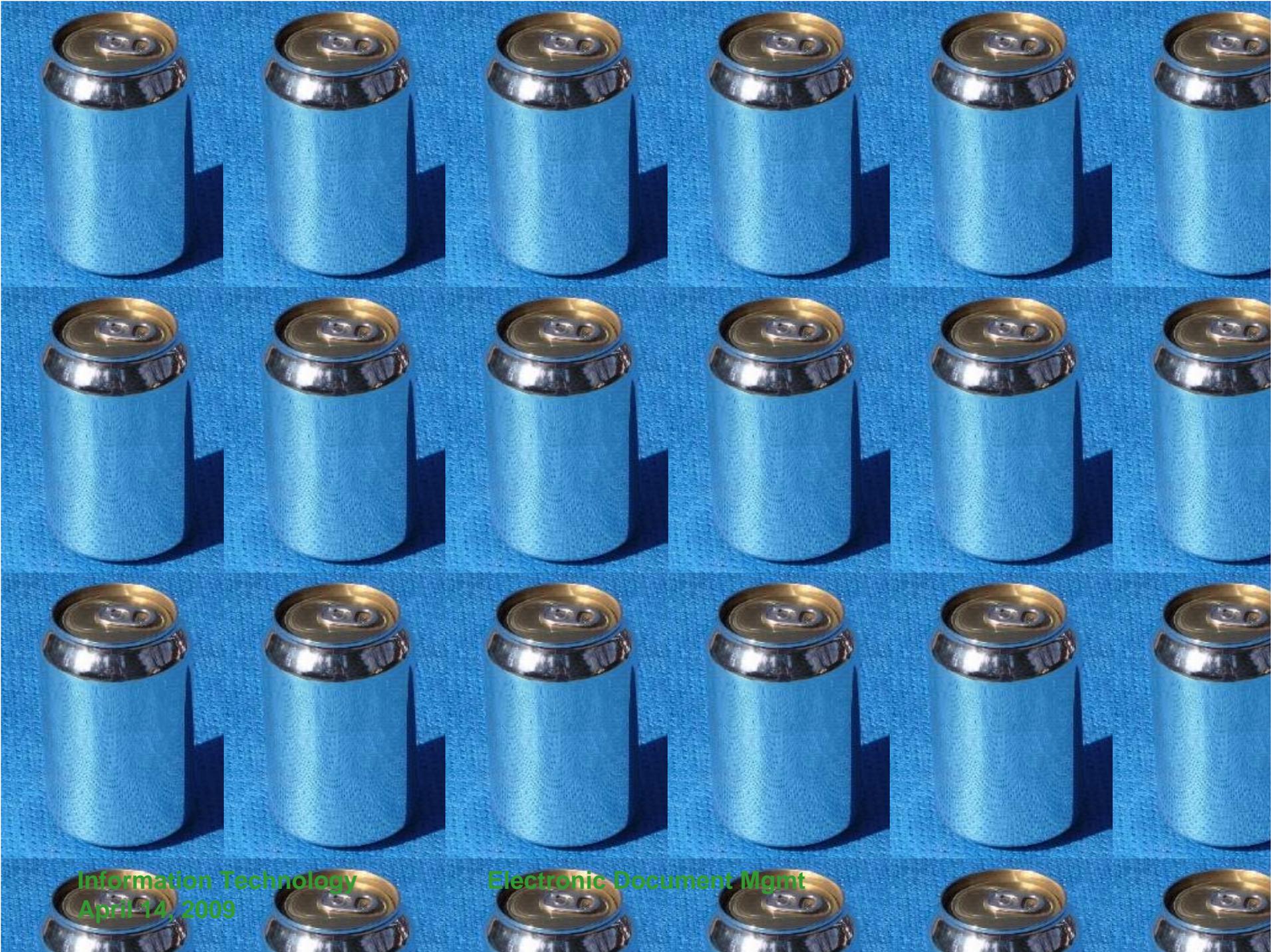
- Creator
- Contributor
- Date
- Modifications
- Document type

■ Metadata is Searchable



Information Technology
April 14, 2009

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Searching Metadata



Metadata - RZ 0016

Fields Tags Links Versions

Template: Hampton Planning Land Use

Land Use Application Type
Rezoning

Case Number
16.000

Address
KECOUGHTAN ROAD

Applicant Name
WILLIAMS, A. BYRON

LRSN
No LRSN

Alias

OK Cancel Help

Best Practices



- ✚ Use Folders
- ✚ Use Naming Conventions
- ✚ Use Metadata
- ✚ Call for Help

Resources



✚ Records Manual

✚ http://cityhall.hampton/pdf/records_management_manual.pdf

✚ Business Resources

✚ <http://cityhall.hampton/>

✚ Library of Virginia

✚ <http://www.lva.virginia.gov/>



Just in Case...

+ Technical Support

+ HelpDesk@hampton.gov

+ 727-6421

+ How to create folders

+ How to search content or metadata

Questions?



Join us on April 30 for Session 2 of
Electronic Document Management
Managing Your Email