

File Management



Hampton
VIRGINIA

Hampton City Staff



Agenda

- ✚ File Arrangement
- ✚ File Management
 - ✚ Naming and Labeling Files
 - ✚ Purging
 - ✚ Identifying Inactive Files
- ✚ Active vs. Inactive Records
- ✚ Electronic Files
- ✚ Best Practices



File Arrangement

- ✚ Alphabetic
 - ✚ Chronological
 - ✚ Dictionary order
- ✚ Digit Filing
- ✚ Encyclopedic order
- ✚ Geographical
- ✚ Numerical
- ✚ Serial number



File Management

+ Naming and Labeling

- + Drawer or Shelf Labels
- + File Guide Labels/Tabs
- + File Folder Labels
- + Electronic Files

What's in a File?

- ✦ Avoid saving unnecessary documents.
- ✦ Remain consistent in how you arrange your documents.
- ✦ Store related documents together.
- ✦ Separate ongoing work from completed work.
- ✦ Avoid overfilling folders.

File Management

+ Purging Files

- + Why

- + When

- + What

 - + Duplicates

 - + Administratively Necessary information

 - + Draft information

File Management

+ Identifying Inactive Files

- + Access

- + Timing

 - + Calendar Year

 - + Fiscal Year

- + Projects

Active vs. Inactive Records

+ Active Records

- + Consulted routinely

+ Inactive Records

- + Occasional reference
- + Audit/legal obligations

+ Identifying inactive records/cut-off

- + The point at which a record series becomes inactive.
- + Begins the retention period.
- + Can refer to an event; termination of employment, end of funding period, termination of contract, accreditation received.
- + Typically refers to a period of time; end of the calendar year, end of the fiscal year.

Electronic Files

+ Electronic Files are Records

- + Electronic Filing Structure
- + Use Naming Conventions to determine file names
- + Records Retention period apply

Best Practices

✦ Paper Files

- ✦ Screen material – know what to maintain.
- ✦ Ensure that material is complete.
- ✦ File information in the front to ensure the most current information is on top.
- ✦ Check files – not documents - in and out.
- ✦ Outcards should include: folder title, borrower name, date out, date returned.

✦ Electronic Files

- ✦ Maintain your Inbox/Sent Items.
- ✦ Appropriately name electronic folders/files.

Tips and Tricks

- ✦ Advice from the LVA
- ✦ Do it now!
- ✦ Help your time management

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Resources

- + Records Manager – Debbie Wolff
 - + Records Management Manual
- + Information Technology
 - + Online Training

Questions



IT/2008

File Management

Strategic Area
Slide 15