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

- 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
- 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…

Information Technology
April 14, 2009

Electronic Document Mgmt

Strategic Area
Slide 14
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)
<table>
<thead>
<tr>
<th>Name</th>
<th>In Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records Management</td>
<td>Z:\</td>
</tr>
<tr>
<td>DW Records Officer Designation and Respons...</td>
<td>Z:\Admin</td>
</tr>
<tr>
<td>Bro What are Vital Records.pub</td>
<td>Z:\Forms</td>
</tr>
<tr>
<td>Bro What do I do with all of my old records.pdf</td>
<td>Z:\Forms</td>
</tr>
<tr>
<td>Records Storage</td>
<td>Z:\Iron Mountain</td>
</tr>
<tr>
<td>0800522 Records Ret Questions.doc</td>
<td>Z:\Records Management</td>
</tr>
<tr>
<td>Records Destruction</td>
<td>Z:\Records Management</td>
</tr>
<tr>
<td>Records OLD</td>
<td>Z:\Records Management</td>
</tr>
<tr>
<td>Records SOP.doc</td>
<td>Z:\Records Management</td>
</tr>
<tr>
<td>records_management Basics.pdf</td>
<td>Z:\Records Management</td>
</tr>
<tr>
<td>records_transmittal_sheet.doc</td>
<td>Z:\Records Management</td>
</tr>
<tr>
<td>Records Management Program.xls</td>
<td>Z:\Admin\Budget Information</td>
</tr>
<tr>
<td>FY08 Records Storage Companies.doc</td>
<td>Z:\Iron Mountain\Records Storage</td>
</tr>
<tr>
<td>[Source Code] Copy Records.zip</td>
<td>Z:\Laserfiche\HR</td>
</tr>
<tr>
<td>0811222 Records Information.xls</td>
<td>Z:\Laserfiche\NWS</td>
</tr>
<tr>
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<td>Z:\Records Management\April RIMM</td>
</tr>
<tr>
<td>FTTH Handout - Public Records Management-Q...</td>
<td>Z:\Records Management\Other Program Reference</td>
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<tr>
<td>NASCIO-RecordsManagement.pdf</td>
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<tr>
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</tr>
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</tr>
<tr>
<td>Working with Records Coordinators.pdf</td>
<td>Z:\Records Management\Other Program Reference</td>
</tr>
<tr>
<td>0801 v01 POL DFT Records Management Ma...</td>
<td>Z:\Records Management\Policy</td>
</tr>
</tbody>
</table>
What is Metadata?

- Creator
- Contributor
- Date
- Modifications
- Document type

Metadata is Searchable
Searching Metadata

Metadata - RZ 0016

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
Best Practices

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

- Records Manual

- Business Resources
  - http://cityhall.hampton/

- Library of Virginia
  - http://www.lva.virginia.gov/
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