

File Management: Training

What are the top 10 tips for managing electronic files?

- 1) Retain or dispose of electronic records according to established records retention schedules. Identify files that no longer are needed or scheduled for destruction and delete them as appropriate for legal and storage considerations.
- 2) Use file names and folder names that are descriptive and indicative of the content of the files in order to facilitate retrieval by you or others in the future.
- 3) Consider creating a file folder structure that will allow for quick retrieval and a contextual view of all the files that are related to a particular topic and subtopics.
- 4) Make sure files on your network and/or hard drives are being backed up. Learn what your office policies are and whether you are responsible for your own backup files.
- 5) Remember that the security of your files cannot be assured. Use caution when storing and handling confidential or sensitive documents.
- 6) Be aware of when you are the keeper of the record copy of a document and the responsibilities that entails.
- 7) Generally, only keep drafts or multiple versions of a file when they are needed to document the creative process. When working with drafts, it is a good idea to add the date of change and/or your initials to the file name in order to make it easier to identify the most recent version.
- 8) Think carefully about the best place to maintain and back up your files. This decision may be based upon the frequency with which you need to access the files or if access is needed from multiple locations or by multiple people.
- 9) University-sponsored computers and software are intended for university business. Use them sparingly for personal reasons.
- 10) If you don't have a records retention schedule, if your schedule is out of date, or if you don't know how to manage your files, contact the University Archives & Historical Collections (UAHC) staff for more information at (517) 355-2330 or visit the [UAHC Web site](#).

Where can I learn more about records management?

The UAHC staff can help you with:

- Records Retention Guidelines—The UAHC staff will work with your office to establish records retention guidelines that help staff manage paper and electronic files at the end of their life cycle.
- Educational seminars and workshops
- On-site consultation and advice—On-site visits to your office by the UAHC staff can address:
 - Effective ways to organize or manage the information for which you are responsible
 - Management of an overflowing e-mail inbox

- Whether records at the end of their life cycle are taking up valuable office space
- Organization of paper and electronic files into a logical structure
- Potential liability of retaining unneeded information too long
- When to retain records and information “just in case”

Visit the [UAHC Web site](#) or call (517) 355-2330.