State Agency E-Records Tips

- **Consult Your Records Retention Schedule:** Know what retention periods have been approved (both minimum and maximum) and take appropriate actions (e.g. transfer to the State Archives, destroy, etc.) when the retention period for your records has been met.

- **Plan Ahead in ERM System Design**: Talk to an archivist, records manager, and other stakeholders; determine the possibilities for system adherence to retention and disposition guidelines.

- **You've Got to Have Standards**: Ensure you have a trusted system and that your records are authentic (see ISO 15489, ISO 16363, DoD5015.02, metadata standards, etc).

- **Organization is key:** Who's in charge of the shared file? Are people using email as a filing cabinet rather than a communication tool? Which copy is the record copy?

- **Make the Rules:** Naming conventions, file organization, and disposition strategies all help now and in the long term. Make the rules known and follow them.

- **Do You Have Backup?** Does your backup system work? How well will it actually restore your e-records? Can you retrieve individual items? Consider off-site storage.

- **Understand Metadata:** It's data about your data (and helps your records live long and prosper).

- **Keep the content, context, and structure:** How can you keep all three of these characteristics viable for your records? Hint: metadata helps!

- **Do you have built-in strategies?** Can you migrate your e-records? Transfer them to the archives?

- **Does delete mean delete?** E-records proliferate easily. Do you have a plan to manage deletion of all copies that *should* be deleted? E-discovery will include all files.

- **Think before you scan:** Standards, worthiness, naming conventions, storage, and retrieval (among other things) should be considered before you turn that scanner on for the most efficient and useful results.

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