Cleveland Museum of Art Archives Organizing Electronic Records

(these slides have been combined, rearranged, and used in different ways depending on the audience and intended outcome of the training session)

Organizing electronic records

- Electronic records need to be organized and managed like paper records

  – Without opening a record or file you should have a pretty good idea what it is

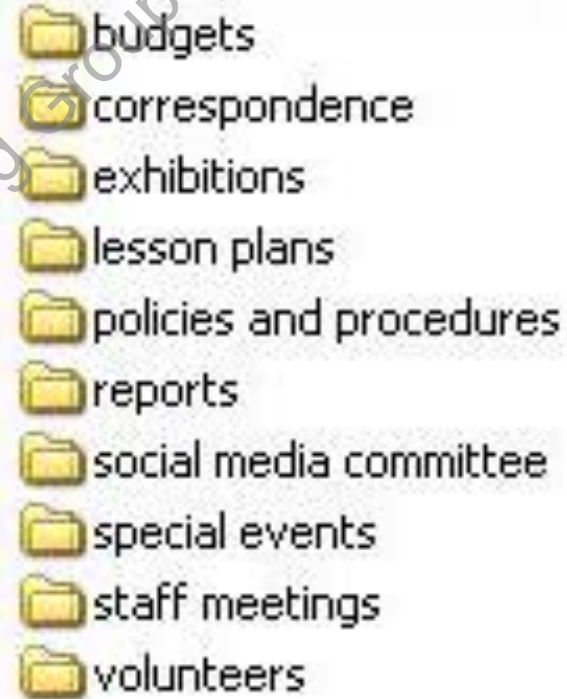 – A pile of papers is less useful than a file of papers

On the left, an electronic pile
On the right, electronic files

COMMITTE
DELEGATE.ODA
DEWINTER.LON
DIMENGO.LTR
DWINTER.EXH
DYPPRGMS.GK
E&PPHIST
EDSLIDE.PKT
EDUCDEPT.EXT
EDUC-PD
EDUGOALS
EHTLIST
EODYSSEY.MW
ETSQUES.KS
ETWT.MMO
F1
FHGSCH
Film Attendance 10 yr.doc
FINGRANT.RPT
Formula for percentages.doc
FUNDS.88
GOALS.OBJ
GOALS.PB
GPENNY.88
HAIRSTON
HAWLEY.LON
HCONT.ED
HINSON.LON
HISTORY.PRS

HONDAMER.ICA
ICLUBS.MW
INITLWRT.PS
INTRVIEW
ITALETCH
JAPCHOFC.OMR
JAPCONSU.LMW
JAPINFO.ZIM
JDISAB.88
JOBOPEN
JOHN
JSGETTY
KEYS.MRS
KGUEST.LEC
KOZLOFF.SPT
KSOAC
LABELS3.MD
LABELS.MD
LFILMS.MW
LOMOND89
LS
MAIL.PRO
MAILEY.FAM
MARAPRIL.TRC
MasterpieceinMakingKathman.ppt
MCGRAW.RL
MEETING.125
MEMO.2KC
Memo.doc

MEMO.KC
MFILMS.JE
MINUTES.125
MISOIP.OAC
MUSEUM
NEWS.CDD
NIGERIA
NIGERIA.1
NSLIDE.MW
OAC.DIS
OBJLST.G21
OREPORT.KG
Org chart with name
PANEL.OAC
PAUL
PAUL.JAB
PENNY.2
PEROFCLA
PERSIST.OBJ
PERSOFCL
PMLK.88
PRACTICE.KC
PROMOLST.NBL
PROPOSAL
PUBLMEMO.MW
QEXT.DIV
QUESTHOU
RDONORS.EXT
SHERRI

budgets
correspondence
exhibitions
lesson plans
policies and procedures
reports
social media committee
special events
staff meetings
volunteers

Filing schema

- Paper records are filed in named folders with associated documents, this should happen with electronic records too

- Ideas for filing schema
  - Alphabetical (computers organize documents and files this way automatically)
  - Chronological
  - Subject/topic

- Goal = other people can understand your filing schema without you being there to explain it

Naming records – consistency is key

- Inconsistent naming
  - 3-26-2012minutes
  - 2012-03-12min
  - Min20120319
  - Minutes march 5

- These documents are out of order and are confusing

- Consistent naming
  - 2012-03-05_minutes
  - 2012-03-12_minutes
  - 2012-03-19_minutes
  - 2012-03-26_minutes

- These documents are in order and not confusing

Naming conventions

- Descriptive names
  - Minutes.doc is not descriptive, minutes of what? When?

- We recommend putting the year first
  - Hard to get used to but arranges your files nicely in chronological order
  - You will easily be able to tell what the newest version is

- Name length
  - Limit file names to 40-45 characters to avoid problems with copying and moving files

Nesting Folders

- We recommend keeping nested folders to three or four levels

  - For ease of finding things

  - To avoid technical problems with copying and moving deeply nested folders

F Drive

- Each department is assigned space on CMA's servers
  - Organized in a departmental filing schema by project, date, topic, etc.

  - Access to folders is given to staff by the head of the department.
    - In the library, all folders are accessible to staff except the Admin folder, which is used by Betsy for confidential items

F Drive personal folders

- Personal folders
  - Each F Drive has a section for personal folders

  - To be used for:
    - Confidential items such as performance reviews
    - Drafts of documents not ready to be shared

  - Not to be used for:
    - Personal pictures
    - Music, games, movies

C Drive

- Computer hard drive should not be used for museum business

  - It is not backed up so a computer crash could mean the loss of all information on hard drive

  - Is appropriate for the storage of any personal items such as a music library

What to keep and what to delete – in general

- You can delete things you did not create (when they are no longer useful to you)
  - No need to keep:
    - Drafts
    - Memos of a routine nature
    - Agendas/minutes for meetings you attended but didn't create
    - Informational copies of reports you did not write
    - Copies of press releases and news clippings
- If you are not sure, ask archives staff