



How to Deal with Digital Records

Although computers and the internet have made business more portable and efficient, in the absence of installing an expensive electronic document and records management system (EDRMS), hard copy and paper remains the simplest way of managing records.

Keeping records

We recommend you regularly print out records worthy of retention and continue to file them in a paper file. Backups can be kept on electronic storage, but this can be corrupted and become completely irretrievable, and damaged or lost must be easier than a paper file.

Organising digital records

Digital records are much easier to use, search and share when well organised. If you plan a structure for your digital folders and files, it will be easier for files to be found when needed and for new parish staff to use them.

Name your files with informative titles, so no context is lost for future users. The full date and purpose should be contained, i.e. 20191225 Parish Committee Minutes. This title explains *when*, *who*, and *what*. It is best to use the date in the format YYYYMMDD – this way, all the files will sort chronologically and files from the same year, month, or day can be found quickly.

Above all, it is important to be consistent across your records. If there is a particular term used for that committee or subject, make sure it is used every time. Abbreviations are, in most cases, not recommended.

When collaborating on editing a file, it is best to create new files to show the progress of the document. A common way of reflecting this in titles is the suffix “Version 0.0”. The whole integer (1.0) indicates a major revision, while the decimal (0.1) reflects minor changes. The second version of a record with three minor edits would be Version 2.3. It is not necessary to keep all versions, but it is recommended they be retained if they show a major change in direction or policy.

Social media

If your parish is maintaining a website or social media accounts, it would be worthwhile to regularly document the content posted to these sites. An image or pdf of the pages is an appropriate way to record the social media activities of your parish.

Emails

Digitally, emails can be retained within the email host (Outlook, etc.) or saved as either an Outlook Message Format file or pdf from the web-based inbox. These offline copies should be backed up like other digital files, but just like all other business records, we recommend they are printed out and retained on the hard copy file.

Information technology



Digital records in use by the church or parish should be regularly backed up, and stored securely away from the computer[s]. This will prevent any disaster that may destroy the computer from also destroying the backup.

Anti-virus software should be used on all computers in the church/parish. Commonly, malicious attacks can come via emails containing links or attachments. Parish staff should be trained in how to spot a suspicious email and how to avoid any phishing attacks.

Before upgrading programs or changing operating systems, be sure to check that your parish records will be transferred correctly, and no important information will be lost.

Because digital files can't be "seen", users can forget how many they have. This can lead to increased storage costs. Refer to retention guidelines to see which files are no longer needed and can be deleted.

Any other questions?

Please do not hesitate to contact the Diocesan if you have any further questions.

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