A Helpful Guide to Digital Records in Congregations

In the digital age, many of us have switched to keeping records electronically. We type up minutes, upload photographs online and work through finances on Excel. This is appealing as it is easy to access, is searchable, and can be saved in different locations with multiple versions. However, it is important to consider how digital records are organized, what to do if hardcopies are created.

Benefits of Digital Records
- Do not take up office space and instead takes up computer memory, which also costs less
- Can be accessed remotely at any time
- Documents are quickly searchable (using Ctrl + F keys) to find specific words and phrases
- Preservation copies can easily be created, copied and sent out
- Document versions (e.g., drafts, final) can be distinguished easily through file naming
- Documents can be protected behind a password to ensure privacy and security

Structuring Digital Records
Files can be organized using folders and sub-folders to group records that are related. This is like using a binder to keep all your notes on a specific committee in one place. You may want to organize your records by congregational bodies, for example: Board of Managers; Board of Trustees; Session. Within folders, you can have sub-folders which would be equivalent to tabbed binder dividers. When organizing your records by congregational bodies, you may want to use sub-folders to further separate the files into the years that the records were created and/or the type of records within the committee. For example, a

Session folder may have the sub-folder labeled with the year 2021 and then further sub-folders for all records created in that year titled: *Minutes, Notes, Members of Session*. Organizing documents by year is important not only because it helps you locate things, but is also helpful when implementing a retention schedule[1]. Overall, this structure assists in quickly locating and recognizing specific digital records.

Files can also be organized using naming conventions. A naming convention is an agreed upon structure and wording of file names to ensure all who access them can quickly and easily identify the content of the document. This is important for the future users of these files to find what they are looking for. There are several things to consider when formulating a naming convention:

1 Ensure that all staff are using the same naming convention and understand any short forms used.
2 The order folders appear can be controlled by including numbers at the beginning of a folder name.
3 Avoid the use of generic file names. At the file level, use a name that reflects the content of the document and include a creation date. For example, *Session Minutes – December 2020*.

✗	✓
Minutes	Session Minutes – December 2020
List	List of Church Elders – 2020
Report	Sunday School Report – 2019

4 If your document has multiple versions (e.g., drafts, final) include it in the file name. For example, *Annual Report, 2021 – DRAFT*; *Annual Report, 2021 – FINAL*.

Example of Structuring
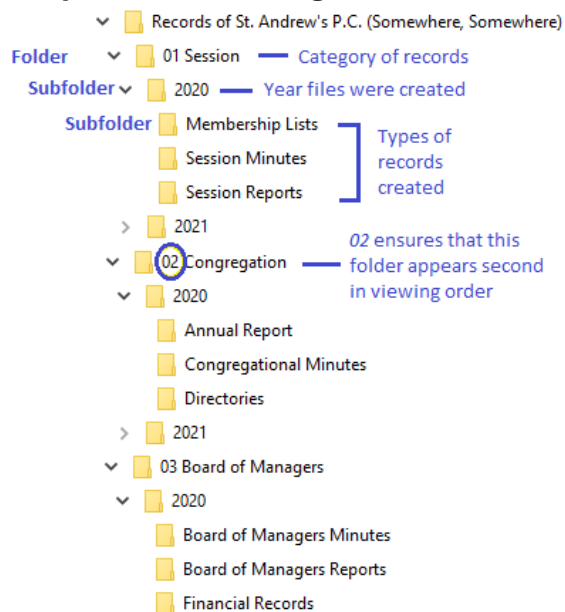
Backing Up Digital Records

Accidents happen and sometimes important files can be lost or damaged. That is why it is important to frequently back up your records. With digital records, it is easy to make a copy and store them in a separate location. It is recommended that a USB or external hard drive is purchased to perform regular backups. This device should be stored away from your computer, in a secure and ideally offsite location.

Consult your local electronics store for a suitable device. Consider durability, reliability and storage capacity.

Printing Out Digital Records: to do or not to do?

Many people are more comfortable working from paper records so they opt to print out their digitally created records. Although this will ultimately take up more office space, and may lead to record duplication, there are ways to make this a more acceptable option:

- Ensure that the hardcopy is filed accordingly into file folders, drawers, or binders with proper labels.
- Delete digital records that no longer serve a purpose once printed, such as a Word document you do not require to edit or send out electronically.

- If choosing to maintain a physical and digital copy of the record, ensure that both versions reflect one another. Specifically, if changes are made to the physical copy, they will be made on the digital copy or if changes are made on the digital copy, a new physical copy will be printed, and the older version destroyed.

Preserving Emails

Emails are a heavily used form of communication that are often forgotten about when applying records management. It is recommended that any important attachments that come in via email are saved onto your computer. Additionally, any significant correspondence (i.e., discussion reflecting policy or procedure) should be either saved as a PDF or printed and properly filed.

Transferring Your Digital Records to the Archives *(dissolved congregations only)*

If your congregation is closing, aside from the physical records intended for deposit at the Archives, it is also important to transfer your digital records. This includes any hard drives, USBs, CDs, or floppy disks that contain documents or photographs which are included in the dissolved congregation guide[2] and do not exist in paper form. The Archives should have the most updated version of your documents, whether it was edited by hand or edited and saved on a computer. Duplicates are not required.

The National Archives has an excellent in-depth guide on digital records management entitle "Managing digital records without an electronic record management system," available online at nationalarchives.gov.uk.[3]

Questions? Consult an Archivist

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NOTES
[1] presbyterian.ca/congregation-records
[2] tinyurl.com/mvdh5ecj
[3] tinyurl.com/2p8ym9ah