

FILES MANAGEMENT & MAINTENANCE

Main reference: (online) *Files Management Handbook*, Indiana Commission on Public Records, Records Management Division.

Personnel

1. Training (A model folder would be handy.)

- What information to put on the file folder label
- Order of documents in the file (Separate sections with tabs or use a different colored sheet of paper.)
- Avoid paper clips or stapling whenever possible. (Clips and staples rust, or fall off and litter the floor.)
- How to file

2. Ownership: Use “OUT” cards when removing files from their storage area, so other people will not think the files are lost or misfiled.

How to File

1. Alphabetical: A, B, C
2. Numeric: 1, 2, 3, 3.1, 3.2
3. Alphanumeric: WCC-678

Rules for Filing

A A & M A.M. Trucks American West Beasley, H. Beasley, Henry Beasley, Henry S. Bea-West, Sarah	Excluding the period, ignore: <ul style="list-style-type: none">• Hyphens and commas, e.g., Hyphenated names are filed as one name, as if the hyphen did not exist.• Articles (<i>a, an, the</i>)• Conjunctions (<i>&, and</i>)• Short prepositions (<i>at, on</i>)• Possessives ('s)
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How Long to Keep Records: (Check for the latest schedules online.)

Digital Files

The order of identifying information in the file name should be determined by need and access requirements, e.g., whether you usually search for files by client, subject, or chronologically. The rule of “8.3,” where “8” stands for alphanumeric characters and “3” stands for the file type, is a way to remember to keep file names short and manageable. Use abbreviations as much as possible, but not so much you forget what the abbreviation stands for.

1. Content: all in lowercase; blocks of info separated by hyphens and not underscores (Google sees hyphens as dividers and ignores underscores, i.e., it will combine the words.)
2. Date: YYYY-MM-DD, e.g, March 5, 2010, becomes 2010-03-05
3. Version: v1, v2