OHIOERC GUIDELINES:

BEST PRACTICES FOR EMAIL MANAGEMENT AND DIGITAL IMAGING

AGENDA

- Electronic Records Milieu
- What is the OHIO ERC?
- Managing e-Mail
- Document Imaging
- Panel Discussion

Electronic Records Milieu

- **Explosion in the use of e-recs…**
- **Increased public expectations…**
- **Increased scrutiny, legislation, accountability…**
- **No unified direction, advice from those who have "been in the trenches"…**
  - **Individual efforts continually "reinventing the wheel" wasting precious resources**

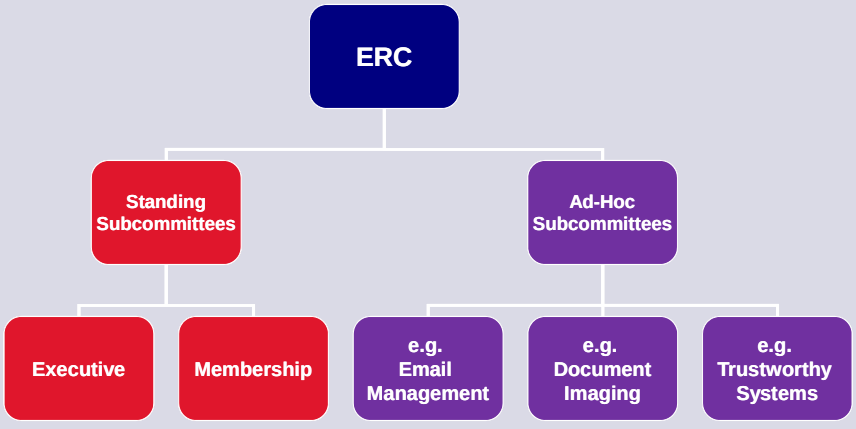
What is the OhioERC?

- **Electronic Records Committee formed by the State Archives and OPP in 1998**
  - *Goal: to develop guidelines and best practices for the creation, maintenance, and long term preservation of and access to electronic records for Ohio state and local governmental agencies and other organizations*
    - **[Note: OPP no longer involved with ERC]**

OHIOERC MEMBERSHIP

- Diverse backgrounds and experiences
  - Academic Institutions
  - Historical societies
  - State/county/local agencies
  - Technical specialists in the public arena
- Using their knowledge to guide others around technology, policy "potholes"

ERC STRUCTURE



Existing Guidance

- Databases as Public Records
- Digital Document Imaging
- Electronic Publications
- E-mail Management
- File Management
- General Schedule for Electronic Records

- Log Files
- Records and Archival Management of World Wide Web Sites
- Trustworthy Information Systems
- *…and just adopted Hybrid Microfilm Guidelines*

Current Efforts

- **Websites and Social Networking Tools**
  - Items to consider when implementing/managing
- **OhioERC Document Review**
  - Update existing docs based on tech changes
  - Create streamlined versions for quick use
- **OhioERC Subcommittees on**
  - Communications
  - Training

WHAT DO WE MEAN BY "RECORD"?

- A records is data or information in a fixed form that is created or received in the course of individual or institutional activity and (preserved) as evidence of that activity.[1]

[1]*A Glossary of Archival and Records Terminology*
Richard Pearce-Moses

- "Records" includes any document, device, or item, regardless of physical form or characteristic, created or received by or coming under the jurisdiction of any public office of the state or its political subdivisions, which serves to document the organization function, policies, decisions, procedures, operations, or other activities of the office.[2]

[2]*ORC 149.011 (G)*

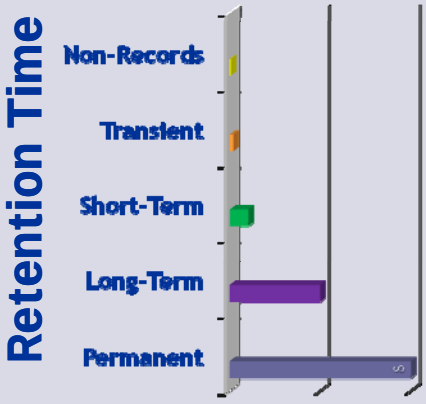
WHAT DO WE MEAN BY "RECORD"?

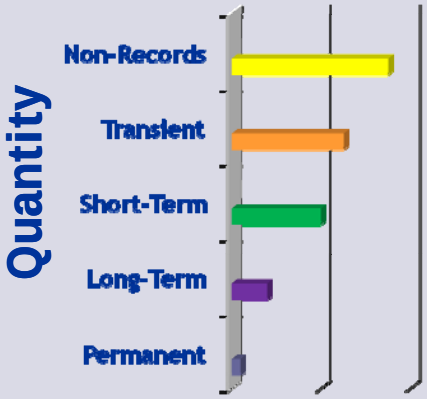
- Characteristics of a record:
  - Content
  - Structure
  - Context
  - Fixity
  - Evidence of Activity

WHY DO WE MANAGE RECORDS?

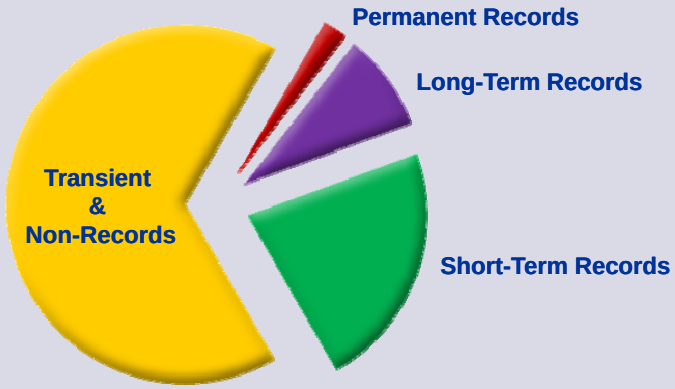
- Legal
- Fiscal
- Administrative
- Research
- Historical

HOW LONG VS. HOW MANY?





BEWARE OF THE K < > H < I ® EFFECT...



INTERESTED IN THE ERC?

http://www.ohiohistory.org/ohiojunction/erc

- Reports
- Findings
- Minutes
- Membership options