## Reorganize *Guidelines for Electronic Records Management* into three new guidelines:

# *Introduction to Electronic Records Management for Public Entities in Ohio*, including these sections from the original guideline:

# 1 – About the Guidelines (rework to fit new guideline)

# 2 – Reasons for Managing Electronic Records

# 3 – Introduction to Electronic Records Management (core of this “new” guideline)

# 10 – Specific Application Types

* 11 – Resources for Additional Types (include 4 – Current Ohio Policy)

# Notes:

# 1.2 “Pursuant to the Ohio Public Records Act” – use more general language, like “ORC provisions governing records created by public sector entities in Ohio”

* + 1.2.1 Refer reader to basic record management guides from ARMA?
  + 2.2 Schedule doesn’t drive/realize electronic disposition – needs to be “baked” into procedures and program settings, in collaboration with IT
  + 2.3 “Preserving” in title sounds like keeping everything – perhaps “managing” would be better?
  + Core of guideline – needs most work!
    - 3.1 Partners?
    - 3.2 Confusing! Does this section merit its own guideline? Perhaps present options (all of which require inter-departmental planning & cooperation:
      * Comprehensive EDMS ($$$)
      * Determining where and if the IT systems and software already in use have (limited?) disposition/management functionality that can be leveraged (exps? Sharepoint? Outlook? Elimination of C:/ storage in favor of departmental drives? This is not my bailiwick…)
      * Training of personnel to manage their own e-records (ha!) including standardized file naming
    - 3.3 (opportunity for tipsheet? How to do a functional analysis / survey of business processes & records?
    - Combine sections 3.4 and 3.6 – reduce overlap.
      * 3.4 Intro & subsections address system design (maybe change title?) – but there is no mention of the necessity of retention and disposition functionality
    - 3.5 Good content, but this doesn’t seem like the best place for it… Maybe roll into section 3 intro?
  + 10 Move content to definitions appendix?

***Preservation of Electronic Records for Public Entities in Ohio***, including these sections from the original guideline:

* 8 – Providing Access to Electronic Records
* 9 – Transfer of Electronic Records Into Archives Custody
* Ask State Archives staff to re-work?
* Add content on Digital preservation?
* Perhaps this should be a tipsheet, rather than a guideline?
* 9 Providing access – falls under Sunshine laws, perhaps beyond scope of this guideline? Refer to AG’s Sunshine book?

***Introduction to Electronic Records Management Responsibilities for Public Entities in Ohio***, including these sections from the original guideline:

* 5 – Responsibility for Recordkeeping
* 6 – Developing and Maintaining and Recordkeeping System
* 7 – Deciding How Long to Retain Records
* “Intro” guideline – most basic?