



Organizing Digital Records

Organizing digital records for retention, disposition, and transfer.

Phase #1: Get Ready

- Identify the records you want to organize and the stakeholders who rely on those records (colleagues, departments). Work with Information Technology (IT) for access and support.
- Watch the [Basics of Managing Records](#) and review your agency's retention schedules.
- Create a project folder in a shared storage location for this organize project.

Phase #2: Sort Things Out

- Create a folder structure in your project folder based on your retention schedule(s): Big Categories (**Functions**) -> Subcategories (**Activities**) -> Record Types/Series (**DANs**).
- Use color to highlight your ARCHIVAL record types/series.
- Copy records from the original locations into the new folder structure incrementally (one folder/category at a time). Verify placement along the way.

Phase #3: Tidy Up

- Rename files to include a date, if relevant, like "2024-12_Report.docx".
- Leave files that are still active (haven't met retention) in their respective folders.
- Move ARCHIVAL files that have met retention into a separate "Transfer" folder. Keep them organized by record type/record series.
- Move files that have met retention into a "Destroy" folder. Keep them organized by record type/record series.
- Create an inventory of your digital file structure using a spreadsheet tool. This might include folder names, file names, dates, and sizes. Use it as a reference for tracking your records.

Phase #4: Final Actions

- Complete a [Digital Transfer Inventory Sheet](#) for your "Transfer" folder and contact your regional branch archives to arrange transfer/appraisal.
- Create a destruction log for the files in your "Destroy" folder and get approval before securely deleting them. IT can help.

Phase #5: Wrap It Up

- You should now have a neat project folder with organized files and original files and folders ready to be removed.
- Get approval to delete the original files and point your team to the new, organized structure.