
FILING

Keep consistent filing systems using meaningful folder names. Review and fine-tune the filing system. Eg All agree to put subject materials in their own folder on the S: drive. Where you are not sure in which folder a document will be looked for create short cuts to the alternative locations. Separate personal and work related information.

In the footer of each document include the date last edited, author and location.

ARCHIVING AND DELETIONS

Published documents (ie static) which are not accessed often should be catalogued and archived, then deleted. It is important that archived information is catalogued. When needed by more than one person documents should be stored centrally within a department. Media for archiving includes Flash Drive, CD-ROM and DVD. Delete temporary files or those which will never again be needed.

SEARCHING

Authors and audience should be easily able to find the correct versions of documents as required.

SECURITY

Documents need appropriate security. Folder security can be set by your information co-ordinator, but keep it as simple as possible. Use passwords on individual documents when they need to be kept secure. (File/Save As/ Tools/General Options). Note: documents on local hard drives are less secure.

BACKUP

Valuable documents should be backed up to tape or archived in case they are lost due to a mistake or system failure.

PUBLISHING

Publication makes the document available to the audience AND lets the audience know that it is there. The way this is achieved will vary according to the application but includes to print and circulate, email, or place on a web, intranet publication, or shared network area.

Do not email a document to a large number of users – instead publish on the Intranet or email a copy to the IT Service Desk who will put in on the web and email you the URL to circulate instead.

OTHER TIPS

Have a departmental Administration folder which contains staff lists, templates, logos and email distribution lists so that the department can get access to these.

Have a regular eHousekeeping day where you can archive files and delete those no longer needed.

GOODBYE!

When staff leave make sure that their documents have been secured ready for their replacement to use.

NOTES

Each Department has an information co-ordinator who contributed to these practices.

See www.lincoln.ac.nz/its/bits for other IM details.



Service Desk
Ext 8048

Email ithelp@lincoln.ac.nz

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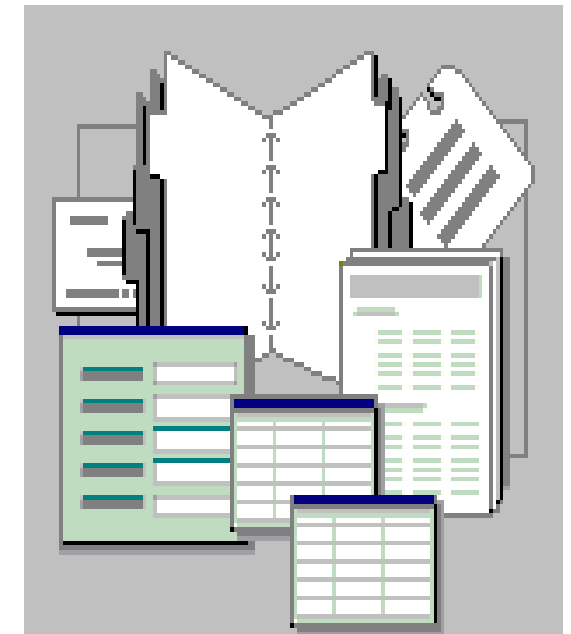
John Buckler

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brochure 20090917.doc

LINCOLN UNIVERSITY

INFORMATION
TECHNOLOGY SERVICES

Good eInformation Management Practices



INFORMATION LIFE CYCLE

- Create or acquire new version
- Edit
- Publish and use
- Archive
- Delete

VERSIONS

Distinguish versions of a document by a version number at the end of the file name. Archive rarely needed versions.

DOCUMENT NAMING CONVENTIONS

Use consistent naming conventions to allow documents to be found easily. Eg:

ITS Managers Meeting 20020412.doc
 COMM203 Exam Paper 2001 Sem 1.pdf
 PCLS Supplier Agreement V2.2.doc

COLLABORATION

When several people need to provide input to a document it is important that the group has a co-ordinator who ensures that the input is applied consistently, deadlines are met and that the group are all working with the same version. Collaboration can take place in two main ways:

- 1 The group members read the document in parallel and provide feedback to the co-ordinator on any changes required.
- 2 The group members book out the document one at a time and alter the document or attach revision notes.

DOCUMENT MANAGEMENT SYSTEMS

It is likely that the University will invest in a document management system at some time to automate version control, filing, collaboration etc. With or without such a system we need to get into good habits in managing our information.

WHERE TO STORE INFORMATION		
Information	Appropriate File Space	Notes
Information with no value to the University.	PC hard drive (My Files) with no backup.	Insecure. Could be lost at any time. Keep data together.
Work in progress – documents being developed. PERSONAL information. (PERSONAL information is information that has no value to the University when a person leaves)	H: Personal Network Drive.	Backed up daily – backups kept for 3 months. More secure from intrusion than a local hard drive but could vanish when a person leaves. Access to H Drives should only be provided to others for a limited period.
Current information with value (to the University).	S: Departmental Network Share Drive.	Managed by Departmental Information Co-ordinator.
Current information where very tight access controls are required.	A Restricted folder in the S: Departmental Network Share	Apply for a restricted folder to the ITS Service Desk.
Current information with value which is often used by more than one member of a department and is also used by a few people outside the department.	S: Departmental Network Share with access rights granted to users outside the department.	Contact Service Desk to arrange additional access.
Current information with value relating to cross departmental project groups, committees or working parties.	LUShare Drive with an appropriate Folder.	Located within the S Drive. Contact Service Desk to arrange a new area.
Published information for staff.	Staff Intranet. Including Moodle collaborative spaces.	Contact Marketing to request or place information.
Published information for students.	Student Intranet within Learn@Lincoln.	Use your course pages or contact TLS.
General published information for all.	University web site.	Contact your departmental web maintainer.
Static information which is required rarely.	DVD/CD-ROM archive.	DIY or Service Desk.
Information relating to completed projects which is not needed often.	DVD/CD-ROM archive.	DIY or Service Desk.
Regularly changing information which uses more disk space than is available on the network.	Use a PC hard drive with regular backup.	Contact Service Desk. Keep data together.
Valuable data which uses more disk space than is available on the network.	Requires a custom solution.	Contact Service Desk.
Emails	Save important emails as a text or pdf file alongside other documents or in email folders	