

Guidelines for depositing digital formats

Hardware

If you are giving us electronic records on a piece of hardware, i.e. a CD or USB stick, please label it clearly on the outside with a concise description of the information on it. *Birley P.C.C. Minutes, 1990-2000* or something similar is perfectly sufficient.

File naming

To some extent, you can name files however you like, but consistency is helpful and there are certain characters to avoid and certain naming styles that make finding and accessing the records at a later date much easier.

Like the labels on the hardware, the file titles should give a concise description of the file e.g. *Village Hall Committee Minutes* or

Dates should be written in the *yyyymmdd* format, because it makes sorting files by date far easier. A document created on 15th June 2005 for example, should be assigned the date 20050615.

File names should only use alphanumeric characters, which include lowercase, 0-9, hyphens (-) and underscores (_). Spaces and full stops should be avoided. The Herefordshire Council file naming procedure specifies that documents are named with the date first, subject second, focus or activity third, type of document fourth and version at the end. Underscores are the preferred means of separating words. A basic example of this would be 20050615_village_hall_committee_minutes_v1. A more elaborate version would be:

20150521_new_village_hall_design_work_architect_proposal_v1.

Version control

Ideally, you should only be depositing the final version of each document with us, but there are always going to be exceptions to this rule. If you are depositing multiple versions, they need to be numbered consistently so that we know which version we are dealing with. The Herefordshire Council file naming procedure specifies that all the versions of a document should have the same title, but should be given different version numbers. Use v0, v1, v2 e.t.c. for major changes and v1_1, v1_2, v1_3 e.t.c. for minor changes. The Herefordshire Council version control procedure uses 0 for draft documents, 1 for final documents and 2 for an updated final document.

Metadata

Metadata is data about the documents themselves i.e. information about who created them and when and the dates they were created and modified.

At a very basic level, the name of the author, the date the document was created and its title need recording, preferably either on the first page or in the document properties. Knowing the purpose and status of the document is also useful.

Spreadsheets need to include headings, a key to any codes or abbreviations used and the relationships between the data tables described.

If the document contains pictures, you may need to save images, captions or titles separately.

File format

Save the files in the format they were created in. If you make copies, you can lose quality and functionality.

We will accept deposits of obsolete formats and software.

Open, widely used and uncompressed files are also preferable. Microsoft Office formats are a good example of one of these.

File structure

It is useful for us to know the context in which any files and documents are created and used. Saving the records in a file structure that reflects this is therefore very helpful e.g. showing which committee or sub-committee a report was created by or prepared for. Is correspondence kept in date order or by recipient?

Managing your files

You should weed your files regularly and dispose of any duplicate, unnecessary or irrelevant files, particularly if they have been superseded by new versions.

You should back up your files regularly. This is far easier if you are part of an organisation with a server to back up records to. It is often done automatically. Most people will not be able to do this, so backing up files on cloud storage or on a portable hard drive are sensible alternatives. Using static media such as USB sticks or C.Ds is more problematic as these types of media are more likely to deteriorate or become obsolete. You should always store back-up copies in a different location to the original files.

Make sure your anti-virus software is always up to date.

Limit who can access your files, so that unauthorised changes cannot be made. You should password protect your P.C. as a bare minimum, but you can also do this for individual files or folders if they are particularly sensitive. Please ensure though that any password protection is removed before they are deposited with Herefordshire Archive Service.