

The United Church of Canada Archives is committed to assisting local communities of faith with managing their records and ensuring that their histories are preserved for future generations. This guide is meant to provide a starting point for congregations wishing to transition from keeping their records physically (i.e., paper-based) to digitally. Whether you are looking to make this shift, or you're refining your current practices, we hope to provide you with helpful tips and tricks that will make this change easier!

## Benefits of Digital Records

There are several reasons why a congregation may wish to keep their records digitally. It eliminates the need to print off and store records in an office, freeing up valuable space. Digital records can also be retrieved more easily, as you can access them on your computer or cell phone, instead of visiting the church to access a paper copy. The United Church's [Strategic Plan](#) emphasizes the importance of managing space most efficiently, which can be aided by migrating to digital records.

## Migrating to Digital: Considerations

When making the shift to digital records, there are some decisions that should be made before you transition. Below are a few of the first steps, along with some advice to make these decisions easier.

## Where to Store Digital Records

This may seem straightforward, but where you store digital records is more important than you may think. You may be tempted to save files to your computer or a USB stick, but we suggest that congregations **avoid** these options where possible. If a computer stops working or a USB stick is lost, those records may not be recoverable. Instead, opt for a **cloud-based records storage** option, such as Google Drive or Microsoft OneDrive. These are affordable options that allow you give access to multiple people at once. If your congregation has used USB sticks or other portable devices to store digital records, **please contact the archives to transfer these materials immediately.**

When storing digital records, <b>DO</b> :	When storing digital records, <b>DON'T</b> :
<ul style="list-style-type: none"> <li>✓ Use cloud-based storage providers like Google Drive or Microsoft OneDrive.</li> <li>✓ Ensure that you choose a platform that allows multiple users to access files.</li> </ul>	<ul style="list-style-type: none"> <li>✗ Store records where no back-ups are made, such as a USB drive or on your computer hard-drive.</li> <li>✗ Choose a storage program where only one person has access to files, in case of a disaster.</li> </ul>

## Granting Access to Digital Records

Once your congregation has chosen a repository, it is important to decide who will have permission to access, edit, or view records in your digital library. We recommend having

several people who know where and how to retrieve these records, to ensure ongoing accessibility. However, it is also advised to only grant access to those who need it due to their responsibilities, to prevent records from being edited or deleted without permission. **If your digital records will contain personal or financial information, then it is even more important to regulate access.** People with permission to access may include: the Minister, Administrative Assistant, Committee Secretaries, and the Archives Committee.

When granting access, <b>DO:</b>	When granting access, <b>DON'T:</b>
<ul style="list-style-type: none"> <li>✓ Provide access and permission <b>only</b> to people who have reason to access, upload, or edit documents, such as a minister or committee secretary.</li> <li>✓ Ensure that you choose a platform that allows multiple users to access files, instead of one single person.</li> <li>✓ Only grant access to documents containing personal or financial information to those who need these records, and who understand privacy regulations.</li> <li>✓ Grant access on the folder level. Some users may need access to financial records, but not membership information. Review permissions annually.</li> </ul>	<ul style="list-style-type: none"> <li>✗ Give access to people who do not reasonably need to access, edit, or upload documents.</li> <li>✗ Have access be limited to a single person, which can be dangerous in the event of a disaster or vacation.</li> <li>✗ Give access to files containing personal or financial information to those who don't have an obvious need for it.</li> <li>✗ Share you login credentials with anybody else. Each user should have their own login.</li> </ul>

## 1. Organizing Your Files

When it comes to organizing your files, it may be easiest to reflect on how you have managed your paper records. Chances are, you have likely arranged these by their function, such as a binder containing the agendas and minutes for a specific committee. In this respect, digital and physical storage are very similar! For example, with digital records, you may have a folder for “Planning Committee” where you keep the agendas and minutes, or a folder named “Annual Reports,” where the report for each year is kept. Folders, like binders, should be clearly labelled, so that it is easy to find the relevant records.

When organizing digital records, <b>DO:</b>	When organizing digital records, <b>DON'T:</b>
<ul style="list-style-type: none"> <li>✓ Use file folders to arrange your records to facilitate easy retrieval.</li> <li>✓ Use clear and consistent naming conventions for folders (e.g., “Planning Committee” or “Annual Reports.”)</li> </ul>	<ul style="list-style-type: none"> <li>✗ Store all of your files in a single folder. This is cumbersome and will make finding files difficult</li> <li>✗ Use ambiguous folder names, which do not clearly indicate the files contained within.</li> </ul>

<ul style="list-style-type: none"> <li>✓ Think about what records you are going to create <b>before</b> you start organizing and establish a logical file structure based on your needs and activities.</li> </ul>	<ul style="list-style-type: none"> <li>✗ Create too many folders with too few records. This will hinder discoverability and create clutter.</li> <li>✗ Create too many folders within folders. Having more than two layers of folders will also hinder discoverability.</li> </ul>
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## 2. Naming Your Files

Having clear names for your files is like having a well-organized bookcase: when each book has a clear title, you can easily pick out the one you want! Using a **consistent** naming convention for your files will prevent confusion and will organize your files within their folders more easily. Including the date, committee or folder name, and type of record can help make accessing records a breeze! For example, 2024-06-30\_PlanningCommittee\_Agenda provides you with all of the information you need to know what the file is about. For consistency, it is important that each user uploading records knows the proper convention.

When naming digital records, <b>DO</b> :	When naming digital records, <b>DON'T</b> :
<ul style="list-style-type: none"> <li>✓ Be clear and descriptive. You want the title to tell you exactly what the file contains. (E.g., 2024-06-30_PlanningCommittee_Agenda).</li> <li>✓ Be consistent. Establish and follow a naming convention to standardize your file names.</li> <li>✓ Include dates (if applicable). Using dates for committee meetings (as an example) will eliminate the need of opening a file to determine <i>which</i> meeting it was for.</li> <li>✓ Be concise. File names should only contain essential information to help identify files quickly.</li> <li>✓ Use hyphens (-) or underscores (_) to separate words, instead of spaces.</li> </ul>	<ul style="list-style-type: none"> <li>✗ Use vague titles like “minutes” or “agenda.” These will make it difficult to identify the file you need.</li> <li>✗ Name your files on an ad-hoc basis. This will scatter your files across a folder and make them difficult to locate.</li> <li>✗ Create long file names. More words = more reading and more time to find the record you need.</li> <li>✗ Use symbols/special characters (! @ # \$ % ^ &amp; *). Some operating systems do not allow special characters, and may create complications.</li> <li>✗ Use spaces. Spaces may affect how your files are organized within each folder, hindering accessibility.</li> </ul>

## Managing Your Files

Managing digital files is an ongoing endeavour that requires constant vigilance. While digital files don't take up shelf space, they can still clutter up. For your congregation, it's best to keep only the final version of important documents, deleting drafts or unnecessary files. If a

document needs a signature, ensure the final copy includes it. Save the final version in PDF format for long-term storage, as this format is more stable over time.

When managing digital records, <b>DO</b> :	When managing digital records, <b>DON'T</b> :
<ul style="list-style-type: none"> <li>✓ Store the <b>final</b> copy of documents such as minutes, agendas, reports, etc. in a PDF format.</li> <li>✓ Clearly label draft copies of documents still being worked on (E.g., 2024-06-30_PlanningCommittee_Agenda_DRAFT)</li> <li>✓ Delete any drafts once a final document has been completed.</li> <li>✓ Regularly review existing files and delete those which are no longer used and are not of archival value.</li> <li>✓ Ensure that the digital copy of signed records include any signatures. <b>This is essential for legal purposes.</b></li> </ul>	<ul style="list-style-type: none"> <li>✗ Keep any and all digital records that are created. This will clutter your folders and make finding records difficult.</li> <li>✗ Forget to save the signed copy of any legal-binding documents.</li> <li>✗ Be over-zealous in deleting old files. You may have legal obligations to keep certain records, even if they're no longer used!</li> <li>✗ Create excessively large documents! Large files require more digital storage space, which is more expensive and energy-intensive to preserve.</li> </ul>

## Remember Retention and Archival Transfers!

The records that your congregation creates are managed according to a carefully designed retention schedule, which governs how long our records should be kept, both for **church** and **legal** purposes, and to preserve the history of your congregation. Be sure to review the [Sample Records Schedule – Congregations](#) to see which records should be kept, which should be destroyed, and which should be sent to the archives.

**Records such as minutes, agendas, annual reports, property records, policies, and more should be transferred to the archives on a recurring basis. Please do not delete the final copies of any records meant for the archives.**

If your congregation requires any assistance transitioning to the use of digital records, or advice for managing these records, please contact the Ontario Regional Council Archives.