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Cambray Document Storage Procedures

Introduction

This document outlines the procedures necessary to support the CBC Document Storage Policy

General Requirements

All archive material needs to be kept in secure accommodation, a cool, fairly dry and stable environment. There should be protection against fire, flood, theft, pests and other hazards including damp and mould. Good practice includes:

- Storage areas must be secure and must be kept locked when not in use.

- Access to the storage must be controlled and monitored.

- If a storage area has to be shared, archives should be clearly separated and only handled by people responsible for their care

- No item should be removed without permission of those people responsible for their care.

- If an item is moved or removed, a note should be left with details of where it is and who has it.

- A register of withdrawals and returns should be kept.

Places for storage of documents should have controlled environmental conditions protected against water penetration and flooding. Stores should be located away from water tanks and radiators, which may cause damage to collections.

The latest British Standards Institution (BSI) publication' PD5454: 2012 '*Guide for the storage and exhibition of archival materials*' recommends for mixed collections including papers, photographs, leather bound volumes and other materials storage temperatures between 13˚ and 20˚C. It also recommends that relative humidity (moisture in the air) should be kept between 35% and 60%.

Sharp fluctuations during the course of each month should be avoided.

Packaging of documents

Records need to be protected by archival quality (fibreboard) boxes and packaging in the long term to ensure that they remain in good condition. In the shorter term, the main aim should be to box files of loose papers in clean containers and to label them with brief descriptions of the contents.

- Containers should not be airtight as the lack of air circulation can lead to damp and mould attacks, however these should be stout enough to give some protection against water and smoke damage.

- Plastic bags and containers should not be used.

- Bound volumes need not be boxed unless they have detached boards or badly damaged bindings, but can be shelved upright.

- Do not stick labels directly onto spines.

Selection of documents to store

The most important step is to gather the historical records which have passed out of current use and to arrange them following their original order, which reflects the activity or functions of the creator. This would involve for example keeping all deacons' meeting minutes together.

Not all records contain evidence of historical value and these records may be considered for destruction. Some material may not be of permanent value, containing little or no evidential worth according to established criteria. This judgment should not be the decision of an individual and would benefit from professional archival advice. There is no need to keep multiple copies of publicity material that is printed. One archival copy of each publication for example should normally be kept as evidence of this type of activity and of the event itself.

The Charity Commission for England and Wales has published *'Retention of Accounting Records'* that can help organisations to appraise their current administrative and financial records and develop their own records retention schedule for these categories of records.

https://www.gov.uk/government/publications/charity-reporting-and-accounting-the-essentials-november-2016-cc15d

Digital Records

Electronic analogue and digital records are an ever-increasing part of modern documentation and record keeping. It is vital that records in this form are preserved and made accessible for both for current operational requirements as well as for their long term research value.

So when we are assessing CBC's records we must not overlook records created and stored on CBC computers or stored on detachable physical media (external disk drives, DVDs, CDs, memory sticks, etc.), whether they are word-processed documents such as drafts of letters, e-mails, web pages, photographs, films or databases.

Unlike paper records, those created in digital form will not survive very long without active intervention. They require systematic and periodic attention, because without such care even the short-term future of digital material is uncertain. Firstly, digital records are dependent on software and hardware. This means they are vulnerable to changes in technology and the market. For example, many sizes of floppy disk were in existence a few years back but now, no modern computer can read any of these. Secondly, the media on which electronic records are stored is unstable. Disks, diskettes, and hard drives as well as optical media like CDs and DVD's all have a limited life-span. Though estimates vary depending on storage media a ceiling of twenty-five years seems a reasonable estimate. It is worth noting that for memory sticks, the latest widespread form of electronic data storage, the lifespan is significantly less.

Although comprehensive strategies for achieving the long-term preservation and accessibility of electronic records are still being devised, and the same solutions are not necessarily applicable to all types of digital records, simple measures will improve the likelihood that the digital archive remains intact and accessible.

The key steps are to:

1. Identify the digital records
2. Decide which are most important
3. Organise the content
4. Save copies in different places
5. Manage electronic records

1. Identify the digital records

Gather information about the digital records we have. Where are the files located? On a computer? On a camera? Online? Are they scattered around on unmarked disks and CDs?

Do a survey to locate computer hardware in any physical form. This may prove a useful exercise to locate records more generally. They may be held by current or previous officers and not necessarily physically onsite the property. It might then be helpful to assemble them physically in one location, but in so doing be careful not to any lose information that might be provided by the order in which they were stored, or any paper records that might provide context.

- The first task is to identify what it is the media actually contain.

- Use a dedicated computer that has up-to-date antivirus software and that is not being used for online activities that may introduce viruses.

- Create a new directory on the computer for the material identified with an identifiable name.

- Then create folders for each of the media to transfer. If possible, set a write blocker on the computer and write-protect tabs on the media to prevent unauthorised changes to the content. If the electronic data is on removable media (e.g. CDs), copy the data from the physical medium to the relevant folder.

- If digital records are on removable media (e.g. CD's), copy the data from the physical medium to the relevant folder. If the medium is a disk, consider copying the data as a disk image, which is a single file that contains an exact copy of the disk's content and ensures that essential metadata will be retained.

Conduct an initial survey of the material to form an overall impression. This does not necessarily entail opening and reading every record; an initial assessment might involve opening a few files in each folder to assess whether the folder title accurately reflects its contents, and an assessment of the likely significance of the material. File names, dates, author and correspondent names can be useful clues. This survey should help identify low value material, which can be deleted, material that may have short- or medium-term use, and material with potential long-term value.

Generate a copy of the directory information (folder and file names, sizes, extensions, and dates). Store a digital copy in the survey directory and print out a hard copy for reference. It is also advisable to make a back-up copy of the directory. An external hard drive might be used for this purpose.

Consider old digital material. This can be in forms that simply cannot be accessed (for example, floppy disks), or it may be that the software required to read the file is now lost.

There are techniques and equipment for retrieving information held in such cases but it is not easy to know whether it is worth spending money, time and energy on retrieving information that may well prove to be of no value. Look for any identifying information on labels or associated packaging such as the creator, title, description of contents, and dates. Record anything that is known about the hardware and software used to create the files. Remember that many of the media will have been created relatively recently, easily within living memory, so their creators may well be alive and able to remember something about the media. For example, photographs of a social gathering from 3 years ago, or copies of CBC's newsletters.

2. Decide which are most important

It may not be practical and almost certainly isn't desirable to preserve and transfer to a trusted digital repository every single file, so the next step is to select exactly what to save.

Material should be prioritised based on factors such as the following:

- The value of the records to CBC or their historical importance;

- The level of use or anticipated future use of the record;

- Whether there is an immediate danger of loss of content because of media degradation;
- Whether there appears to be significant digital content that is not replicated in paper records, and if so, whether the digital version has features that add value to the content.

3. Organise the content

Once it has been decided what to keep, create a new directory and title it something like *Archives*.

Then create folders inside the directory and name them with descriptive titles according to the subject, project or activity on which they are based.

In naming files and folders, be as consistent and concise as possible while choosing meaningful names based on standard naming conventions. Include the date in the file name, using the format yyyymmdd (e.g. 10 June 2005 = 20050610) for recording dates: that way files will be presented chronologically in file using management tools. It is advisable to avoid capital letters or spaces: this can cause problems when moving files between different computing environments. The University of Edinburgh has published some useful guidance on naming conventions:

http://www.recordsmanagement.ed.ac.uk/InfoStaff/RMstaff/RMprojects/PP/FileNameRules/FileNameRul es.htm

Next, transfer files from wherever they were held originally into the archive folders just created.

If there are several copies or versions of a file, always save the highest-quality, larger-size master version. Give each file a descriptive name to help find the files again in the future.

When saving documents from the Web for reference purposes, make a note of their source: web addresses can change and it can be important to have a record of where it was obtained.

E-mail management

E-mails should be regularly managed and organised into subject folders with concise and relevant titles. Separate personal and professional email if possible. It is sensible though potentially time-consuming to save historically important e-mails in an alternative format such as html. But don't forget to include the metadata (sender, recipients/s, date etc.), or any attachments. Consider whether to file e-mail attachments separately rather than leaving them in the email directory. If this is done, identify their source in their file name, and save a copy of the e-mail alongside the attachment to provide contextual information

Then delete any e-mail that has no long-term value.

4. Save copies in different places

Always make a backup copy of digital archives.

An external hard drive is the best and most convenient choice. Using CD-Rs or DVD-Rs is more time-consuming, could result in splitting data over several disks, and they are also more easily misplaced. A hard drive can hold a lot of content so it makes a good central repository while being portable. Store that copy in a different geographic location away from the main copies.

However, even hard disks will fail at some point. They will either physically decay or become outdated in time. At least once every ten years transfer the content from the old drive to a newer storage technology. This helps ensure ongoing access to archives.

It is possible to backup digital collections with online services. But always read the terms and conditions carefully and don't use an online service as the only backup. Keep a copy on a drive at another location.

Paper is still this best backup option for the records intended for permanent preservation. Print out copies of important documents and photographs, so that we can have the document in an alternative and durable format.

5. Managing electronic records

Without active and ongoing management, digital records are extremely unlikely to survive intact in the long-term. Use the system of record-keeping just adopted to inform future filing and ensure that new records are created and kept in a compatible way.

Before undertaking major upgrades and updates of hardware and software, think and plan ahead. It is common for older files to get lost as a result of updates so files should be backed up prior to such changes.

Anti-virus software and a firewall should be installed and regularly updated.

If valuable digital records are encrypted, it is best to select open-source encryption software. However, it is important that if digital data is encrypted that there is make provision for their access in the event of an organisation ceasing to exist. The same is true for password-protected material, which may include the computer, of course. Relevant details should be stored offsite in a secure location, perhaps lodged with another organisation or kept in a site known only to key colleagues.

Keep up to date. Technological changes are rapid and new technologies are constantly appearing. Interoperability with others and the threat of hardware and software obsolescence mean that the digital environment must constantly evolve, but consider critically the impact of these new developments on the ability to use digital data now and in the future

Sources of advice on digital archives

There are many online sources of advice on all aspects of digital records management and archiving. Among those most suitable for those with little or no technical knowledge are:

'A useful introduction to the importance of digital preservation is a short video guide, published by the Library of Congress:

http://www.digitalpreservation.gov/multimedia/videos/personalarchiving.html

The Online Computer Library Centre has produced useful starting information at:

You've Got to Walk Before You Can Run: First Steps for Managing Born-Digital Content Received on Physical Media, by Ricky Erway (OCLC, 2012)

(http://www.oclc.org/content/dam/research/publications/library/2012/2012-06.pdf)

The National Archives offers a number of resources:

Advice for creators and managers of electronic records when selecting physical storage media for long-term preservation

http://www.nationalarchives.gov.uk/documents/information-management/selecting-storage-media.pdf

Guidance on care, handling and storage of removable media

http://www.nationalarchives.gov.uk/documents/information-management/removable-media-care.pdf

Assistance in identification of files in unknown formats:

http://www.nationalarchives.gov.uk/PRONOM/Default.aspx

The Digital Preservation Coalition has produced a *Handbook on Digital Preservation*

http://www.dpconline.org/advice/preservationhandbook

Although principally aimed at specialist staff in organisations, it includes much useful general advice.

If it is believed that the archive (whether in digital form, paper, or mixed format) should make its way to an archive repository for permanent preservation, then it is a good idea to get in touch with the chosen repository at an early stage. Identify archive services within in the area of collecting interest on ARCHON, a directory for archive repositories and institutions in the United Kingdom. This is available online:

http://www.nationalarchives.gov.uk/archon/

Contact the Archives Sector Development department at The National Archives who can offer advice on suitable places of deposit: asd@nationalarchives.gsi.gov.uk.

Questions to ask

We need to ask ourselves the following questions to help decide whether to retain historical records or deposit them elsewhere:

- Do any of the surviving records have significant value as evidence of CBC, who it serves and its history?

- Can these be brought together and maintained by CBC?

- Will external funding be sought, with the implication of opening up public access, or will CBC fund the archive itself?

- How will appropriate care and access be provided? Is there, at least, a secure storage room and reading area, which can be constantly supervised?

- Where is professional advice going to be obtained if there is no professional archivist?

- Who is going to arrange and list the archives?

- Is deposit with an appropriate local or specialist record office a more viable option?

- Are records from other organisations or individuals going to be collected?

- If so, are the necessary procedures in place to support the gift or loan of archive material, and future preservation?

- How is sensitive material going to be handled in terms of access for research? Who is going to determine whether they are closed or made available?

These questions may be daunting for some, but they will perhaps help CBC to make realistic decisions as to the future of our records.