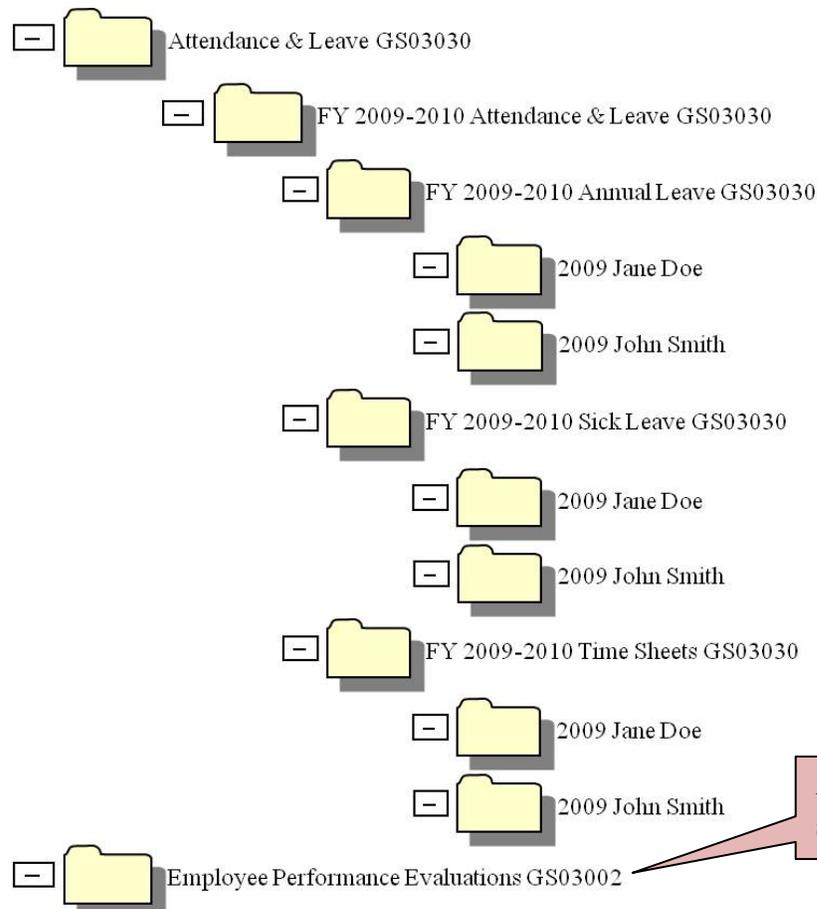# Guidelines for Organizing Electronic Files

The Washington Military Department (WMD) retains records so they are easily accessible, searchable, and retrievable. This reduces time, effort, stress, legal risk, and financial impact of managing public records, and facilitates the conduct of agency business. WMD electronic records are stored in centralized locations on WMD shared network drives and servers so they are backed up, secured, and available.
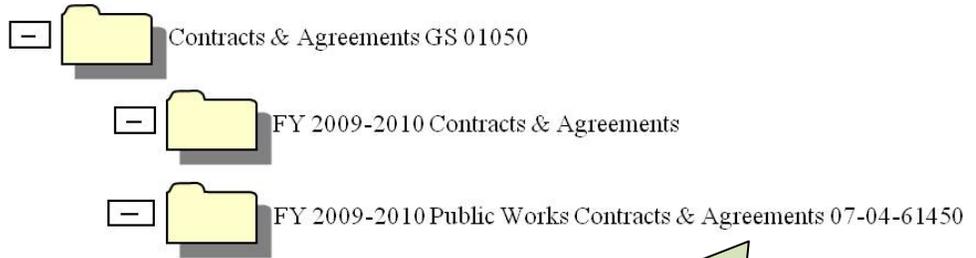
I. Organizing Electronic Files

A. Identify the designated shared drive that will be used as the centralized "file cabinet" or repository for storing WMD records.

B. Use a "file plan" or "file structure" linking it to retention schedules (see examples below).

1. Create a new folder under the designated shared drive.

2. Identify the records series using the General Records Retention Schedule and the Unique Records Retention Schedule

3. Name the file, keeping it short (under 255 characters), simple and easy for users to identify.

    i. Include the Disposition Authority Number located in the General Records Retention Schedule or Unique Records Retention Schedule.

    ii. For records that require special handling, include "identifiers" in the names, such as "archival", "essential", or "exempt".

4. Repeat items 1-3 to add additional record series' as needed.

EXAMPLE A

- Attendance & Leave GS03030
  - FY 2009-2010 Attendance & Leave GS03030
    - FY 2009-2010 Annual Leave GS03030
      - 2009 Jane Doe
      - 2009 John Smith
    - FY 2009-2010 Sick Leave GS03030
      - 2009 Jane Doe
      - 2009 John Smith
    - FY 2009-2010 Time Sheets GS03030
      - 2009 Jane Doe
      - 2009 John Smith
- Employee Performance Evaluations GS03002

Add more records series, as needed

EXAMPLE B 📁 Contracts & Agreements GS 01050

　　　　📁 FY 2009-2010 Contracts & Agreements

　　　　📁 FY 2009-2010 Public Works Contracts & Agreements 07-04-61450

> This series is *UNIQUE* and *ARCHIVAL* – 15 year retention for agency, then transfer to State Archives

> **This series has a longer retention (4 years), is *ARCHIVAL* and *POSSIBLY ESSENTIAL* and should be noted and handled accordingly**

EXAMPLE C 📁 Correspondence – Executive/Official GS 10007

　　　　📁 Correspondence – General GS 09005
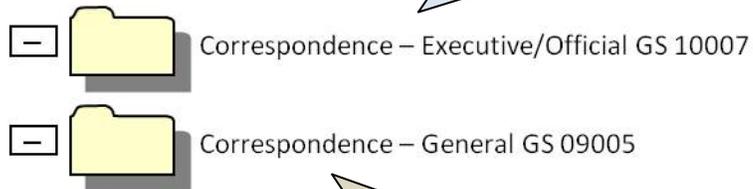
> This series has a 30-day retention, so can get rid of sooner