

# Director's Office

## Preparing your records for archiving

### Guidelines for fulfilling your public records obligations

A director's records are considered permanent and historical, with few exceptions. This status extends to the director's executive assistant, and the top executive staff because they work on behalf of the director.

Some points to keep in mind:

- The records created or managed by the director's office are part of the director's and bureau's legacy and need to be saved (by law).
- Records documenting on-going issues and initiatives should remain accessible as necessary; however, legacy hard copy records should be transferred to the Portland Archives & Records Center (PARC) and electronic records, including email, should be managed in TRIM (the City's electronic records management system).

Specific guidance:

- Hard copy records: Because these records will be accessed in the future, please have staff refer to the guidance available online.
  - Remember to label each box and include in the box title the name of the key staff responsible for the records.
  - Tutorials, instructions and forms for sending boxes to the Records Center (PARC) can be found on the Archives & Records Management website: <http://www.portlandoregon.gov/archives/51812>.
- Electronic records:
  - If you put documents or email into TRIM, you've fulfilled the requirements and can delete copies stored on your computer or in your email.
  - If it isn't in TRIM, you have to do a few things to fulfill your legal obligation:
    - At a minimum, move any electronic files to the office share drive. This includes any files stored on flash drives, drop boxes, computer/device hard drives, phones, etc. Everything must be brought together on the share drive or put into TRIM.
    - You can reduce the number of irrelevant emails by using this email cleanup guide: <http://efiles.portlandoregon.gov/record/9676542>
    - Calendars: the director's calendar is considered permanent. If you have any questions about how to preserve these, contact Brian Brown (ext. 5-4108)
- Photographs: photos are permanent and need to be preserved with the City Archives. If images **only** exist within social media or photo sharing sites, please contact Brian Brown (ext. 5-4108) to discuss the best way of transferring them. If images posted to social

media are copies and the office maintains the official version on the office share drives, please let Brian know so they can be captured and transferred.

- Social media: any social media outlets used by the office are also considered public records. Please contact Brian Brown (ext. 5-4108) to arrange for transferring the sites. You will need to provide all login information.
- Gifts: Not all gifts to the City make it into the Archives; those that are not chosen will either remain in the office for display purposes or are donated to an appropriate agency. I will work with you on deciding what will get transferred to the Archives and can discuss alternatives for donation.
- Non-permanent records: as mentioned above, there are some records that are not permanent and should be segregated. These records most commonly fall within office and personnel management. Here is a list of the more common non-permanent records, and their retention requirements: <https://www.portlandoregon.gov/archives/27185>

Finally, remember to remove any personal files, emails, photographs or other records you may have stored in the office or on your computer. These are not public records and should not be archived.



## Portland City Auditor Archives and Records Management

### Contacts

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