Document Management
& Document Control

What is Document Management/Control?

- **Document Management** is a system used to track, manage and store documents to improve the organization's access to records and increase efficiency and accuracy in the use of the organization's information. In the case of the management of digital document, software is used to achieve these goals.

- **Document Control** is a process put in place to enforce a controlled system (digital or paper) related to document, creation, review, modification, distribution, retention and destruction.

Some Stats – Digital Files

	Size (Gigabytes)	# of Files	# of Folders	# of Files >5 years old	% of Files >5 years old
Drive 1	551.5	485,492	55,985	214,248	44%
Drive 2	257.3	278,279	24,115	184,612	66%
Drive 3	1000	285,864	17,595	109,831	38%
	1808.80	**1,049,635**	**97,695**	**508,691**	**50%**

What are we currently working on?

STANDARDIZING FILE NAMING

STANDARDIZING FOLDER STRUCTURE

DOCUMENT CONTROL PROCEDURE

Document Retention

Document Retention is a procedure specifying what should be done with categories of documents or records at a certain point of time.

LCA Document Retention Resolution & Procedure – Following Municipal Records Act

File Type Tags

FN-4 **Annual Audit and Financial Reports**

Including Elected and Appointed Officials, Survey of Financial Condition and Tax Information submitted to the Pennsylvania Department of Community and Economic Development.

Retain 5 years.

FN-5 **Annual Budgets and Related Records**

Usually includes final budget as approved, departmental requests, review files, correspondence and related papers.

Retain one copy of the annual budget permanently. **Retain** all other related papers **7** years.

What's Next?

Internal file clean-up → Evaluate access security

Select document control software → Use software to assist file reorganization

Paper file scanning → Document Control System Management