

How to manage ECB information



CYCLE

CREATED

CREATED by member of staff or received from externally

ISPOSED

OSED OF according CB retention plan



2 STOR

and/or

Information management lifecycle

DISTRIBUTED

DISTRIBUTED to these with an interest or need to know

The Information lifecycle



CREATED

CREATED by member of staff or received from externally



STORED

STORED in DARWIN, an approved application and/or paper filing system



DISTRIBUTED

DISTRIBUTED to these with an interest or need to know



DISPOSED

DISPOSED OF according to ECB retention plan

How to **name** ECB documents

Make it simple

- Use sentence case (not all caps)
- Avoid abbreviations/ acronyms
- Avoid special characters:

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~!@#$%^&()+=[]{};:',?
|/\<_€
```

Make it unique

- Relevant dates with the format YYYY-MM-DD
- The type of document (e.g. agenda, presentation, minutes)
- The context (meeting forum, sender, recipient)
- The topic, key words and any actions
- The status (DRAFT, FINAL, UPDATABLE)

Naming examples

Tell people what it really is – use good titles - unique and easy to read, understand and help find the documents





Is it an orange or a kiwi?

e.g.

2021-10-26 - Presentation to SPL-ISO - information management - DRAFT

2019-12-15 - Presentation to EB - Importance of ECB information governance - DRAFT

How to **classify** ECB information



- Security classifications are assigned at folder level.
- Items saved in a folder automatically inherit the security classification of this folder.
- Security clearance should be considered upon folder creation.
- The security clearance of a folder should always correspond to the level of the highest classification applied to the individual items contained in it.



Where to store ECB digital information

All electronic ECB documents (including business relevant e-mails) must be stored in DARWIN!

Documents in Darwin

Documents should be **stored**:

- within a folder with closely related documents
- use shortcuts to facilitate access from different locations

Keep folder structure flat, consistent and neat

Darwin collaboration tools

Communities
Blogs
Wikis

Which emails to store in DARWIN



Store important business emails in DARWIN

Evidence



of business activities, decisions, transactions

Future value



Information with future business, financial, legal, research value.

Formal communications



between staff and external parties



Keeping & **deleting** information

The <u>ECB Filing and Retention Plan</u> defines which **ECB documents** should be retained permanently as part of the historical archive and which should be destroyed after fixed periods in line with legal, accountability or business requirements. It is integrated in DARWIN and retention happens at regular intervals.

Keep (e.g. save in DARWIN)



- Information with future value (business, financial, legal, research)
- Formal communication (between staff and external parties)

Delete



- Information with short-term value
- Ephemeral information not required in the future
- Duplicates or copies
- Drafts superseded by a final version



Thank you!

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