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## **McGill University Archives Office Systems Survey Form**

Description of Unit

**Name of Unit:**

**Function of unit:**

**Contact person(s) and job title:**

**Phone number:**

**Email address:**

**Date of initial visit:**

**Visited By:**

### Electronic Records Location

(Campus Novell Servers, Departmental Servers, Stand-alone workstations) Please identify these by their unique names and provide paths.

**Which Novell Server is your unit on?**

**How much space has your unit been allocated (in megabytes or gigabytes)?**

**How much space do you currently use (in megabytes or gigabytes)?**

**How does your unit use its space on the Novell servers (primary storage, backup, other)?**

**What are the backup policies?**

**Do you keep any records on your local hard disks?**

**Is the save default for your user directories mapped to the network server?**

## Classification

Describe in broad terms the folder structure that your unit has created to conduct its business. For example, shared folders, user folders, and public folders are a common method of organizing Novell servers. Describe the folder structure at least 2 levels down i.e. root level and sub-level. Print from Windows Explorer view the network folder structure and attach as documentation.

**Does your network contain confidential administrative electronic records?**

**Does your network contain essential electronic administrative records?**

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## Hardware and Software Environment

What kind of computing environment exists within your unit (PC, MAC, UNIX, Sun, other)? Specify operating system name and version.

List productivity software (applications) used (for example, MS Office [specify name and version]) and describe their usage (do you use them for word processing, database creation, graphic design, etc).

Are there any legacy file formats and software to run it on your network?

Is there a data migration policy or system in place?

Are the electronic records ever purged?

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List the records series:

For each records series complete a separate Electronic Records Series form



## Electronic Records Series

### Name of Unit:

Contact person(s) and job title

Records series name: eg. Banner finance Reports, POPS payroll files, correspondence files

Inclusive dates:

### Principal or Secondary Record

Is this records series a principal record, generated as part of the mandate of the unit, or a secondary record, a copy of a principal record or a record circulated to the unit for information purposes?

**Description:** The purpose and function of the record.

**Retention:** Currently, how long are the records kept?

### Format and Location:

Document type	File types e.g. Doc, pdf	Directory on Server – (Please name the server with path)	Directory on Local Hard Drive (IP address with path) eg. Web server or other major set of e- records	Storage Space used in megabytes
Word Processing documents				
Spreadsheet files				
Database files				
Email files				
Web pages				
POPS				
Other				

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**Classification:**

Do you print out these electronic records and place them into the paper filing system?

Describe the classification plan. Are the electronic records organized in folders according to function or activity? eg. Microsoft Exchange/Outlook has provided a rough classification scheme, e.g. items sent, items deleted, inbox, but is a more sophisticated system being used that includes all e-records using a structured functional approach?



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## Extra Notes