

Records Organization Guide

Package Contents:

Each package contains the two following 2 Types of folders:

1. Reconciliation (Recon) Folders

- This type of folder contains financial documents and communications between the faculty advisors and Education Abroad employees.
- These folders usually contain the following **Types** of documents:
 - Budgets (see Ex. 1)
 - Emails (see Ex. 2)
 - Miscellaneous Payment Requests (see Ex. 3)
 - Exchange Rates (see Ex. 4)
 - Memoranda of Understanding (MOU) (see Ex. 5)
 - Cheques (see Ex. 6)

2. Faculty Travel Advisor Folders

- All the other folders apart from the Recon are named after the travel advisors for the trip (i.e., the faculty members who led the trip).
- These folders usually contain the following **Types** of documents:
 - Travel Approval Requests (TAR) (see Ex. 7)
 - Travel Expense Statements (TES) (see Ex. 8)
 - Faculty Expense Statements (FES) (see Ex. 9)
 - Emails
 - Rosters (i.e., lists of the students who went on the trip) (see Ex. 10)
 - FRS Reports (see Ex. 11)
 - Exchange Rates
 - Memoranda of Understanding (MOU)
 - Cheques
 - Receipts (everything else) (See Ex. 12)

Organizational Process:

You can begin by scanning each individual folder from a package into its own document (pdf form is preferred).

Naming convention for each pdf that contains all the documents from a scanned **folder**:

Trip#_PeriodYear_Country_Subject_Type.pdf

Examples:

- 123456_SM12_Germany_ARCH_Recon.pdf
- 654321_WT14_Chile_LARC_Alexis.pdf
- 123654_SB10_France_BMGT_Griezmann.pdf

Once you have scanned each folder into one “big” pdf that contains the scans of all the documents in the folder, you should go through and copy/convert each type of document listed above into its own separate pdf.

Naming convention for each individual **separated pdf**:

Trip#_PeriodYear_Country_Subject_Type_DocumentType_Number.pdf

Examples:

- 123456_SM13_Spain_LBSC_Recon_Budget_1.pdf
- 654321_WT14_Belgium_GEOG_Lukaku_TAR_3.pdf
- 123654_SB10_Wales_SOCY_Bale_MPR_5.pdf

Feb. 2018

Once you've gotten the individual separated pdfs for each document in the package, put all of those documents in one digital folder.

Naming convention for each **digital folder** containing **all the documents** from a package:

Trip#_PeriodYear_Country_Subject

Examples:

- 123456_SM13_SriLanka_HLTH
- 654321_WT14_Uruguay_ANTH
- 123654_SB10_Ireland_ENGL

When you've finished scanning a package, you should have **1 digital folder** that contains all the individual documents, **each as its own separate file**. You may delete the "big" pdf that contained all of the documents together in one file.

Notes:

- As mentioned above, **Type** can be either **Recon** or the faculty travel advisor's name. In the case that there's multiple faculty travel advisor folders, each one should have its own fo
- If you can't tell what the **Subject** is, just write "x" in place of the **Subject**.
- Since there are usually more than 10 Receipts and Cheques per folder, the **Number** is unnecessary for Receipts and Cheques files. You can group all the Receipts or Cheques together in one big file and you can leave the **Number** out of the name.
- In general, if there's a lot (more than 5 or 10) of one type of document, you can just group them all in one "big" file and drop the **Number** from the name.