

From the Heart...

...Lifeskills for Today's Family
By Sharon L. Benedict MS



Recordkeeping . . . what history tells us

(published in Boerne Star, Friday, April 4, 2014)

In the 21st century, we are all becoming deeply dependent on the many mechanical, electronic, digital, and other technological systems that store and manage our lives—and not just our financial lives.

Whatever the recordkeeping system used by a person, business, organization, or government, there has been no other time in history that the most minute details can be filed, tracked, managed, and recorded. Who sees what is always a concern and many times a necessity for a bank loan, even a small purchase. With the obvious “information overload” that is happening all around us, there is also an established routine for deleting seemingly “unimportant” records over time and cultures. It’s a catch 22 scenario where privacy is treasured but also our cultural and historical “collective memories” that tell us where we have been and where we are heading as a culture, society, and world.

Before we get into the current and possible future recording systems, let’s take a moment to go back in history, way back. Let’s see how cultures kept their records. The earliest forms of written languages, such as on stone tablets and papyrus scrolls were likely driven by our need to record our society's laws, governing bodies, births, deaths,

medical records, product/services transactions, even taxes to be paid, and other important information of the time.

We often focus only on written records which are considered more reliable and credible. Yet, for a number of cultures, oral history (including oral traditions) was the mode of recordkeeping. Check out Oral History organization (<http://www.oralhistory.org/publications/oral-history->). Their journal's primary mission is "to explore the nature and significance of oral history and advance understanding of the field among scholars, educators, practitioners, and the general public."

In addition, there were many cultures that recorded their history with pictures on cave walls, animal skins/leather, etc. Some of the earliest recordings go back to 15,000 B.C. with Lascaux cave drawings, 8000 B.C. with the use of clay tokens for accounting, then 7000 B.C. with Saharan Rock Art. We all know about the hieroglyphic writing system created by the Egyptians (3600 BC) and the earliest surviving papyrus roll from Egypt (2200 BC), as well as the Cuneiform writing system created by the Sumerians (3500 BC). We can then leap to circa 240 with Ptolemy II Philadelphus completing construction of the Library at Alexandria.

You can have loads of fun tracing the millenniums by cruising through the History of Archives, Recordkeeping, and Records Wiki (http://scratchpad.wikia.com/wiki/History_of_Archives,_Recordkeeping,_and_Records).

This resource is a product originally of the "History of Archives and Recordkeeping" course taught by Dr. Joe Turrini of Auburn University for the Southeastern Archives Education Collaborative (SAEC) with students from Auburn, Louisiana State University, and Middle Tennessee State University; and moderated by Russell James of LSU.

Now back to the third millennium, today. As you marvel at the ingenious ways ancient and not-so-ancient cultures kept records, you may also find some fascinating resources with an organization that helps develop community-based archives. The Society of American Archivists (<http://www2.archivists.org/about>), founded in 1936, has one vision. That vision is to enable "...archivists to achieve professional excellence and foster innovation to ensure the identification, preservation, and use of records of enduring value . . . Because archival records ensure the protection of citizens' rights, the accountability of organizations and governments, and the accessibility of historical information, the Society of American Archivists believes that the archival profession must take an active role in advocating for the public policies and resources necessary to ensure that these records are preserved and made accessible."

The next article for our *Recordkeeping* Lifeskill month will cover our 21st century methods of recordkeeping. Possibly, this won't be as much fun to cruise through, but hopefully useful for staying even or maybe a little ahead of the technology curve for your family and community.

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From the Heart...

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Recordkeeping . . . what the future holds

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As mentioned in previous article, we are all becoming deeply dependent on the many mechanical, electronic, digital, and other technological systems that store and manage our lives in the 21st century—and not just our financial lives.

Most of us are familiar with the current methods of recordkeeping. Yet, I wonder what is ahead with the technology curve for our families. The direction most obvious is that all records will eventually be electronic with the latest “metadata” technology systems. According to Wikipedia, metadata basically “...helps organize electronic resources, provide digital identification, and helps support archiving and preservation of the resource. Metadata assists in resource discovery by ‘allowing resources to be found by relevant criteria, identifying resources, bringing similar resources together, distinguishing dissimilar resources, and giving location information’...”

In an attempt to preserve information that may typically be deleted with time, thereby losing cohesion with the data retrieved from any search system, the internet being the most obvious source for finding information and gathering data. Large global companies have their own corporate document management systems in place for utilizing metadata for keeping records. According to James Lappin’s blog, Thinking Records, “There is no guarantee that the 21st century will settle on a uniform way of

keeping records. The competition between technology companies is driving constant development of new formats for the communication and storage of information. This competition is fuelled by the fact that the world wide web acts as a giant laboratory in which new collaboration/communication formats can be developed, tried and tested. When these formats are successful on the web they are inevitably brought into the enterprise after a time lag.” With the Internet, as an open system, there will be a demand for increased emphasis on clear identity of the original information source and authentication of the integrity of the record.

So, what can families expect in the future when managing their own financial and overall recordkeeping? Families also deal with the many forms of recordkeeping, even today—such as casual or more formal types of handwritten, typewritten, audio/video recordings, publications, personal & business websites, social networks, text messages via cell phone, and computer generated software systems (including e-mail and databases).

Even memos and scribbled notes, e-mail, voice mail, and sketches on paper placemats (and electronic forms of these types) may all be records. It all depends on how they are used and required. Our own family doctors are now going all digital for medical records that we can access online.

So, welcome to the 21st century! Every electronic device and recording system will only get more “techy” as the years fly by. No one can predict exactly where technology will take us. Yet, we all know our learning curve will continue its journey around another “techy” bend in the road. So I suggest, no matter your age, to hone your electronic recordkeeping skills now. The advanced “techy” transition will then be less

painful for everyone. Check your local library for classes that will help you move along more smoothly in the 21st century. The next article will discuss what records to keep safe and how.

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Keeping Your Records Safe?

(published in Boerne Star, Friday, April 18, 2014)

A friend of mine a number of years ago was driving home one day. As she was turning the corner on her street she saw fire trucks, police, and neighbors filling the street in front of her house. She looked up to see her house was engulfed in flames.

Fortunately, no one was home at the time. Yet, the fire not only destroyed their home but also much of all the contents. In the days that followed, she and her insurance adjuster started combing through the wreckage left by the fire and the fireman who eventually contained the flames from reaching to her neighbors.

What comes to your mind of the items my friend lost? To start with the basics— all clothes, furniture, appliances, computer & office equipment, financial records & documents, and everything hanging on the walls including family pictures and paintings. Where a treasure of photo albums and pictures were stored there were only ashes. Just about every possession was gone except, miraculously, a few photos that were buried in the rubble several feet deep.

Where would you start to put your life back together if this happened to you? Keep in mind, that my friend spent two years working with insurance companies to prove it wasn't her fault. Once that was settled, she was dealing with construction

workers as her new house was being built on the same lot. In the meantime, she and her family first lived in a nearby hotel, then rented a house.

How can you ever recover all those memories of thirty plus years living in that house, raising your kids into adulthood? One thing is sure, without some plan and storage already in place, those precious memories in the form of pictures, letters, children's toys, and other family relics saved are gone forever.

So, if you haven't got a plan or safe storage location in place today, how about getting started, for the "just in case" moments in life. Organizational expert, Barbara Hemphill, president of Hemphill & Associates in Raleigh, N.C., has these suggestions for the safe keeping of records:

- Collect important personal papers and information related to financial transactions.
- Identify a single location to file all crucial papers, such as a fireproof box or safety deposit box.
- Create copies (certified in cases of birth certificates and other crucial documents) for future needs with government agencies.
- Put important original documents in plastic covers to protect them and to help you identify them as the original document.
- Notify the appropriate people where important information will be located, in case you're not available when disaster strikes.
- As you work through the day, always be aware of the kinds of information you should add to your filing system. Keep notes on a card you carry with you or buy a mini tape recorder to save your thoughts.

- Identify the records you or your financial institutions keep only on computer, since they may not be available in case of a large scale power failure.
- If you keep records in a safe deposit box, don't carry the key with you and make sure someone else (perhaps a trusted relative or your lawyer) has a copy of it.
- Create backups of your computer records and if possible, store them off site. This can be done on diskettes, compact discs, zip disks or DVD-Rs.

What do you consider "important papers?" One article you may find very helpful is found at USA.gov on *Managing Household Records* (<http://www.usa.gov/Topics/Money/Personal-Finance/Managing-Household-Records.shtml>). They recommend three piles, active file, dead storage, and shred/discard.

The **Active File** includes gathering all important papers and documents from throughout your home. Then decide which pile to put each item. The active file include documents and financial records you deal with on a regular basis and need to refer to, readily accessible at home:

- Appliance manuals, warranties and service contracts
- Bank statements
- Bill payment receipts
- Bills awaiting payment
- Credit card information
- Education records, diploma, transcripts, etc.
- Employment records

- Family health records, including vaccination histories
- Health benefit information
- [Household inventory](#)
- Income tax working papers
- Insurance policies
- Loan statements and payment books
- Password list
- Receipts for items under warranty
- Safe deposit box inventory (and key)
- Tax receipts, such as those received for charitable deductions

Also, you want to have a contact information sheet for Banks and other financial institutions, Clients, Employers, Employees, Insurance agents, Power, light, gas and other utility companies. Many financial software programs, such as Quicken, provide features for recording contact information, personal property inventory, along with your financial records. Utilizing one of these program will make it easier to compile the needed information for safe storage.

Keep this contact sheet handy and safe. I definitely recommend utilizing a safe deposit box and possibly a fireproof safe in your home. After my friend moved back into her new home, the house was designed with a state-of-the-art fireproof safe for valuables and important documents. And since just about everything is going digital, make pdf/jpeg copies of all important records on a flash drive or larger external hard drive, such as My Book. Put one in the safe deposit box. Keep one handy to backup all computer documents, family images, and other files important to your family. Then

rotate hard drives routinely from your safe deposit box—at least once per month or more often.

None of us can predict the future. Yet, taking the time to store your records, important documents, and family memories as recommended will definitely help ease your mind on the “what ifs” of life. The next article will focus on preserving and storing family memories, digitally speaking, for safe keeping.

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Making & Keeping Memories Safe

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When keeping records safe we are not just talking about finances, your final will & testament, emergency information, or the many other essential documents to keep you on track. Making memories is a dynamic and valuable part of passing your legacy on to those you love and care about.

Making memories last forever is a top priority. So, let's get started before you forget those special moments or lose the opportunity to actually make memories with those special people. When every day is a busy one we seldom give conscious time to making those memories and recording them for our children and grandchildren. Now is the time to start doing just that.

How do you preserve and store your family memories? There are always the old-fashioned way with journaling and occasional snapshots stored in a shoe box somewhere. You have your photo albums and scrapbooks. Yet, in this 21st century, we all know there are other ways to insure your family memories last from generation to generation.

Let's talk digitally speaking. Consider some of these more hi-tech memory makers:

- **Slideshows**—The easiest do-it-yourself way to create your own CD/DVD is to use computer programs, such as Microsoft Word, PowerPoint, WordPerfect Presentations, or Apple's Keynote. Although there are many others out there, these are the most recognizable ones for personal use. You will need to have some sort of scanning equipment and software for converting your hardcopy pictures into digital images. Adobe Photoshop and Jasc Software's Paint Shop Photo Album are just one of many software programs for working with digital images. These programs have some text movement, animation, and sound capabilities to play with.
- **Audio tapes/CDs**—If you still have the traditional audio cassette tapes with your children's baby sounds and Christmas tape, I recommend you convert them to a computer audio format (such as .mp3 or some other extension format that works for you) to place on a CD/DVD to preserve these memories. You can also use them as background for your slideshow. Windows Media Player & Movie Maker come with most computers and offers instructions on how to convert. You may need to purchase additional software for certain tasks. To record new sounds, stories, memories from the computer, check to see if you have a speech recognition-dictation feature to create audio digital files. You can also look for a variety of portable devices for this type of memory maker at most electronic stores. Be sure to put copies of your CD/DVDs in the safe deposit box. You will then avoid the trauma and heartache of losing your prized memories.

- **Video DVDs**—This memory maker takes you to the next level, combining not just photos, but action videos, music, your own oral history on video. You are the story teller on camera, with segment titles; and music at special spots or background mood—all packaged in a special jewel case. You can also include the audio file you made as a backdrop voice for your still and moving images. Check out your computer capabilities for doing both audio and video working together. You can then make multiple copies and give them away as gifts.
- **Family Websites/Interactive Sharing**—Here’s the ultimate possibility for preserving family memories for the world to see. Every day more families are creating their own website. There are now very easy ways to set up your own family website, with pictures, stories, family newsletter, email & instant messaging connections. You can check out options from Yahoo, Twitter, and more for ideas and instructions. Or just get that techie in the family to help out.
- **Online Images Storage Possibilities**—Here are just a few to check out where you can store your precious pictures of your grandparents, parents, children, and grandchildren; plus don’t forget those once in a lifetime vacations, reunions, and even your Saturday afternoon summer fun.
 - Flickr, <https://www.flickr.com/>
 - Photobucket, <http://photobucket.com/>
 - To 10 Cloud Storage companies, <http://www.top10cloudstorage.com/compare-specs/>

- Cloud Google, <https://cloud.google.com/>
- Picasa Google, <http://picasaweb.google.com/>
- Facebook, <http://www.facebook.com>

Keep in mind the internet is a moving target for phishing, and other nefarious activities by very smart people who would better serve humanity in other ways. Yet, such is life in the 21st century. So, one thing you can do is check your antivirus company to check those sites for safety from the latest Heartbleed bug (i.e. <http://safeweb.norton.com/heartbleed>). This bug can get into normally safe SSL or https: urls and grab your personal information. Most reliable sites have solved the problem, but there may be other foxes out there not yet caught in the cyber hen house. You can also check out this Wall Street Journal article for general tips, *Cloud Photo Storage: The Best Way to Bank Family Pictures*, <http://online.wsj.com/>. Just put article title in their search field and Walla!

Once you get a little help and learn how to use the many features on your computer, making forever memories will be preserved for generations in your family. To give you a jump start, I recommend you take a course/workshop in creating these memory makers. Our children are probably already more computer/internet savvy than any of us today. So get them involved in teaching you how to go Hi Tech.

Depending on your motivation, creativity, and learning style, there are many ideas to consider in celebrating memories. Here's your chance to show how much you love your family and close friends. Whichever way you choose to celebrate making memories last forever, be sure to have your children learn to carry on the memory

making tradition; and have fun at all cost (without breaking the budget of course!). You will then treasure the time you spent sharing your family story with those you love and creating a lasting legacy from generation to generation.

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