

**MANAGING THE DIGITAL UNIVERSITY DESKTOP:
UNDERSTANDING AND EMPOWERING THE INDIVIDUAL;
PRESERVING THE PUBLIC RECORD AND INSTITUTIONAL HISTORY**

**Pilot Study Interview Protocol on Desktop Computing Use
(This does not include questions based on specific file/folder organization)**

I. Demographics. (Fill in before talking with subject if possible from departmental web page.)

1. Name	
2. Department	
3. Job title	
4. Rank	
5. E-mail address	
6. Website address	
7. Number of years at UNC-CH	
8. Date of Ph.D.	
9. Ph.D. School	
Research specialties (if faculty)	
Courses taught (if faculty)	



II. Job Description & Records Management.

1. What are your primary duties and functions in your UNC position?	
2. What types of documents or other products do you most often produce with your computer?	
3. Do you know if a records management schedule covers the documents you produce in your position?	
4. Do you produce or receive materials that are "public records"?	
5. Do you know about the NC Public Records Act (NC PRA)?	
6. Do you produce/receive any materials that are covered by the NC PRA?	
7. Have you attended any records management workshops on campus?	



8. Have you sought any assistance from the UNC Records Management Program?	
--	--

III. Computer Usage.

1. Type of primary computer at UNC (PC; MAC)	
2. Format of computer (laptop; desktop)	
3. Do you use more than one computer, and if so, are they different types or just in different locations?	
4. If you use more than one computer, how do you send files back and forth and reconcile versions of files?	
5. Is your hard drive being backed-up? If so, by whom? And how often?	
6. If you're using a laptop as your primary machine, is UNC backing it up?	



7. Is your primary computer covered with up-to-date virus protection? What about your other computers?	
8. How many hours/day do you spend at your computer?	
9. Do you have a wireless connection to the campus network?	

IV. Software Usage.

1. Primary (UNC) e-mail software application (e.g., Netscape, Outlook, Siren)	
2. Personal e-mail software application	
3. Additional e-mail software applications used	
6. Which e-mail application do you like the best? Why?	
7. Which word processing package do you most frequently use? Is this the same at work and at home? Are you using the same version?	



8. What database software do you use most often? How often?	
9. What spreadsheet software do you use most often? How often?	
10. What presentation software do you use most often? How often?	
11. What web design software do you use most often? How often?	
12. Do you ever use project management software?	
13. Do you use a graphics package? If so, which one?	
14. What other types of software do you typically use?	
15. Typically, when do you switch to a new version of software?	

V. E-mail Usage Information.

1. When did you start using e-mail?	
2. When do you check your e-mail during the day?	



3. How much time do you spend on reviewing and responding to messages/day?	
4. How many e-mail accounts do you have? (e.g., @unc.edu; @hotmail, etc.)	
5. How do you manage your accounts (if multiple accts.)? (e.g., do you forward from one to another or keep them separate?)	
6. Which accounts do you utilize for work purposes?	
7. Do you check your e-mail at home?	
8. Do you check your e-mail on the road?	
9. Approximately, on average, how much e-mail do you receive in one day?	
10. Are you on any listservs?	
11. If so, approx. how many messages do you retrieve/day in your work account(s)?	
12. Are listserv messages a problem? Explain.	



13. How would you categorize the types of messages you receive through e-mail?	
14. Has e-mail replaced writing memos or letters for you?	
15. Has e-mail replaced writing memos or letters for you?	
16. Has e-mail replaced phone calls or voice mail?	

VI. E-mail.

Management & Storage	
1. How do you typically handle e-mail?	
2. Do you keep everything in the "incoming" box?	
3. Do you file messages in folders?	
4. If so, how do you organize your folders?	
5. Do you save messages as text or word processing files?	
6. Do you save messages on disks or on a hard drive?	
7. Do you print any of your messages?	



8. If so, when and based on what criteria?	
9. When you print a message is the header (subject, date, to and from) included?	
10. Once printed, where is a message stored?	
11. How many messages do you currently have in you in-box?	
Attachments	
12. Do you save attachments as word processing files or keep them with e-mail or both?	
13. If you save attachments, do you save them to disk or hard drive?	
14. Do you print any of your attachments?	
15. If so, when and based on what criteria?	
16. Do you have your e-mail software set to print attachments automatically along with messages?	
Deleting	
17. Do you do something (dispose of, retain, file, print, etc.) with messages at the time of reading?	



18. If later, typically how much later? (e.g., end of day, end of week, etc.)	
19. Do you delete some messages and quickly respond to others?	
20. Do you completely delete messages by 'emptying the trash'?	
21. Does the software you use automatically delete messages within a certain time frame?	
Sending & Replying	
22. Do you create a subject for each new message sent?	
23. If so, what criteria do you use to derive the name?	
24. When you forward e-mail, do you usually retain the subject heading of the original message?	
25. When would you change the subject heading?	
26. When you respond/reply to messages, do you usually retain the subject heading of the original message?	
27. When you send a message, do you keep a copy?	



28. If so, where and/or how (print, folder, disk etc.)?	
29. When you reply to a message, do you keep a copy?	
30. If so where and/or how (print, folder, disk etc.)?	
Security	
31. Do have any security enforcements surrounding your e-mail account?	
32. If so what kind (passwords, encryption, codes)?	
33. Is your e-mail accessible to others for emergency purposes?	

VIII. Administrative Information.

1. Do you have a secretary/assistant who helps with filing? Filtering e-mail?	
2. What is your impression of a campus-wide ERMS system that would store all your work-related materials, including email messages in one central repository?	
3. Have you ever had experience with an ERMS?	



4. Would you be willing to participate in a pilot deployment of an ERMS system?	
5. What would your reaction be if you were told you had to use such a system?	