

DAY TO DAY GOOD PRACTICE

This section summarises some of the day to day practices which will help you to manage records effectively. More detail on each of the areas covered can be found in the relevant sections of the Toolkit

Records Storage

- ✓ Organise records into clearly labelled files
- ✓ Regularly delete or destroy records which are no longer needed.
- ✓ Aim to store as much information as possible in shared areas
- ✗ Avoid routinely storing records in your personal shared area, unless there is a good reason.
- ✓ Organise records so that others can understand where they can be found

Version Control

- ✓ Delete or destroy old versions of documents which have been superseded, unless they need to be kept as evidence.
- ✓ If old versions are needed as evidence, clearly label the master copy and destroy any duplicates
- ✗ Avoid keeping duplicate copies of documents for long periods (a good example is Committee papers, which should normally be kept by the Committee Secretary only).
- ✓ Clearly label different versions of documents so that it is clear which copy is the current version
- ✓ If draft versions of a finalised document need to be kept, keep these in a separate folder to the final version.

E-mail Management

- ✓ Save important e-mails into shared folders and regularly delete e-mails which have only short term value
- ✗ Avoid keeping the only copy of an important e-mail in your in-box or sent items box
- ✓ Remember that E-mails can be disclosed in response to a Data Protection or Freedom of Information request
- ✓ Use short, meaningful subject headings which will make it easier for the message to be located later
- ✓ Keep e-mails which have temporary value in a labelled Outlook folder and aim to delete the folder once the contents are no longer needed.

