

Records Management Toolkit – Good Practice Guide: Choosing appropriate workspace for storing information

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1. Purpose

This guidance is intended for those who require guidance on choosing the best place to organise and store their information. This document has been prepared as part of the University’s approach to information and records management. It aims to assist with improvement in the University’s management of documents and records by establishing coherent standards of practice.

It is intended to provide a common set of rules to ensure the control of paper and digital records. The conventions are primarily intended for use with documents such as word-processed documents, spreadsheets, presentations, emails and project plans.

This ‘Good Practice Guide’ contains guidelines that follow good practice in terms of records management and are generally recommended for use within the University. It is recognised that other protocols and systems may be in use which meet the different business needs of Offices, Schools and Departments in the University.

2. Types of workspace and their management implications

Workspace	Examples	Use for	Considerations
Individual	Personal network drive	Non-work related information (if permitted by your institution)	Is this area backed-up? If not, what will happen if you lose this information?
	Hard drive		
Individual	Desk drawer	Appraisal and annual review information	Does anyone else need to know this information exists?
	Personal filing cabinet	Initial brainstorming work	
			Will anyone else ever need to access this? If so make sure you give it an appropriate file name now, even if they can’t see it yet
Group	Shared network drive	Draft plans	Can other staff identify and find this information?
	Wiki	Discussion documents	Is it clear that this is the most recent version?
	Closed team space on intranet	Draft reports	
	Shared office filing cabinet	Internal team administration	If and when should it be finalised and released?

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Corporate	Shared network drive	Final, approved versions of plans, reports, policies etc	Is it clear that this has been approved? Should we delete or keep all the previous draft versions?
Institutional Repository	Intranet		Should this be readily accessible just within the institution or by the public at large?
Internet	Registry		When should it be updated or replaced?