



How to choose - PRACTICAL TIPS FOR RECORDS MANAGEMENT

- **Know what you have got.**

The best way to find out is to conduct an audit. List the types of records and their storage medium (paper, film/fiche, electronic etc), their subject matter, and anything else you need to get an overview.

- **Know how much you have got.**

Make an inventory of quantities and volumes- how much space do the records in each category occupy, and what type of equipment is used to store them?

- **Know where it is kept.**

Check all possible storage spaces. Start with offices (check desks and cupboards), and work outwards to shared and more remote areas (including off-site stores).

- **Know why it is being kept.**

If the person holding it cannot justify the need to keep it, they ought not to keep it. More than one person may be holding the same information. You may find things that others need to know about.

- **Know how long it is being kept for.**

Aim to minimise the retention period. Confirm the legal, regulatory and business requirements and check that they are being applied. Dispose of confidential material securely by shredding, burning, or by re-cycling it.

- **Know what to do about it.**

Publish a policy and guidelines so that everyone is clear about the rules to follow. Then arrange to monitor their compliance. Colleagues, supervisors, managers, and auditors all have roles to play in this.

- **Know more.**

Make use of the information you have. Share it whenever possible. Records Management facilitates Information and Knowledge Management; and all three are enabled by Information Technology.