How to best manage information
For Faculty and Departments

To help your team manage information, consideration needs to be given to how the information is named, organized and stored. The University Records Office has developed a simple approach to help you manage your information with file storage solutions. This approach will also help meet obligations to protect, retain, and preserve/destroy information under University policies and legislation.

Phase 1
Initiate
1.0 A senior leader is identified to champion the initiative
1.1 A project charter is created and approved

Phase 2
Document
2.1 Describe
Objective: Identify rules to describe or name information
Examples: Naming conventions, date conventions
Outcome: Users are able to quickly locate relevant information through consistent descriptions

2.2 Organize
Objective: Identify rules for organizing information
Examples: Lists of categories, taxonomies, ontologies, document types
Outcome: Areas are able to easily and consistently protect, preserve and destroy information

2.3 Store
Objective: Identify reliable sources for storing information
Examples: All final meeting minutes are held in Team Drive, information in My Drive is transitory
Outcome: Users understand where to find up to date and reliable information

2.4 Business rules have been approved by leader

Phase 3
Implement
3.0 Business rules and training have been approved by leader
3.1 Team has been trained on Records Management Fundamentals and Business Area’s Rules for managing information

Phase 4
Establish
4.0 Information management practices have been assessed, and sustainment and continuous improvement opportunities identified