

A guide to good record keeping

How to create, store, check and share documents



We work with information every day from emails to spreadsheets, letters to text messages, and more. This information is the basis upon which decisions are made, services provided and policies developed and communicated.

It is our responsibility as civil servants to keep accurate official records. That's why we all need to make sure we are creating, maintaining, sharing and storing information in the right way. Good record keeping will also protect you, should something be called into question at a later date. This desk aid will help you work with all kinds of records and information in the right way.



CREATE

- Official information should be communicated through official channels.
- If a phone call, text or WhatsApp exchange relates to a substantive discussion or a decision, ensure a record is kept.
- The information must be properly named. The subject title should convey what the information is about. Where appropriate, include a date and description (e.g. submission, business case, etc).
- Add a security classification at the beginning or a version number at the end, if required.
- Give emails a clear subject line describing the purpose and content. Remove "FW", "RE".



STORE

- Store business related information directly in the appropriate area of the records management system. Do not save information on your computer desktop or in your personal container.
- Save key emails (e.g. submissions, key decisions or steers, minutes and final products) directly in the appropriate area of the records management system.



CHECK

- Think about any security and handling arrangements, and manage the information appropriately.
- Ask yourself – Who is permitted to see this information? What would happen if it went missing? Who should be able to access it in an emergency?



SHARE

- When sharing any information, think about what access permissions are required (i.e. edit, view) and make sure you are clear with the recipient about handling needs.
- Share links, not attachments, when sending information to colleagues within the NICS. This is more secure and helps to provide a full audit trail.



FOR MORE INFORMATION

Please use the links below

[Information on records and information management policies and procedures, on the intranet](#)

[Guidance on Private Office record keeping responsibilities on the intranet](#)