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## RECORDS AND INFORMATION MANAGEMENT

### CU*ANSWERS
A Credit Union Service Organization

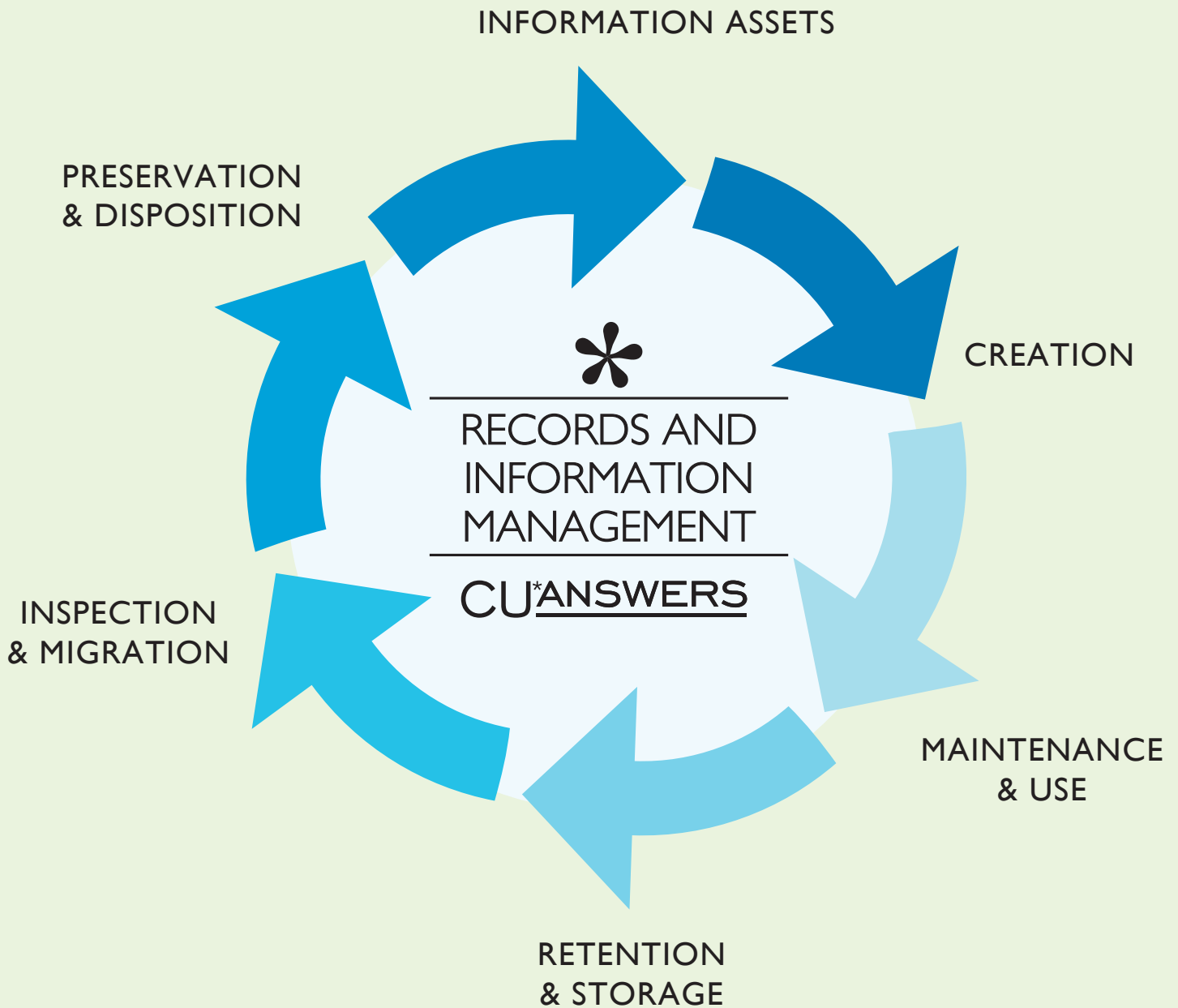# RECORDS AND INFORMATION MANAGEMENT

## CU*ANSWERS

Rim Week Posters 2017

# CAPTURE • STORE • RETRIEVE • PROTECT

INFORMATION ASSETS

PRESERVATION
& DISPOSITION

**\*
RECORDS AND
INFORMATION
MANAGEMENT

CU\*ANSWERS**

CREATION

INSPECTION
& MIGRATION

MAINTENANCE
& USE

RETENTION
& STORAGE

Do you understand the lifecycle of a record?
Do you know your responsibility for records management?
Are you doing your part?

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RECORDS AND
INFORMATION
MANAGEMENT

CU\*ANSWERS

# ABCs

## of Records Management

A - Keep what must be kept

B - Destroy what may be destroyed

C - Understand the difference between A & B

Do you know the difference?

Contact
Marilyn Boyd
x112
for more information

# why records management?

Besides the laws and rules, good recordkeeping promotes effective and productive business practices. Good record keeping makes compliance, audits and discovery easier.

# TAME OUR CLUTTER

**T**hink      before you make a copy

**A**void      multiple versions, share via hyperlinks

**M**ove      e-mails and attachments so that related records are stored together

**E**nsure      easy retrieval for teammates


**O**rganize      items around work processes.

**U**se      the 4 D's for email management.

**R**ing      to avoid overuse of email.


**C**lear      Items that no longer serve a business purpose.

**L**eave      memory sticks, CDs, PC local drives – they are not backed up.

**U**se      file plans workflow and your department's Retention Schedule to manage items.

**T**hink      if you are using the best tool for the job.

**T**itles      should be objective, meaningful and concise.

**E**nsure      deleted items in junk mail are emptied when you log off your PC each day.

**R**ead      information management guidance on the RIM portal page and see how easy it is to take even more control of your information overload.

# RECORDS AND INFORMATION MANAGEMENT

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# Bogged down by Email? These Tips Can Help!

### The four D'S & an "F" for good measure

## Delete it

**Information found elsewhere? Delete!**

## Do it

**If it takes 2 minutes or less, then do it NOW!**

## Delegate it

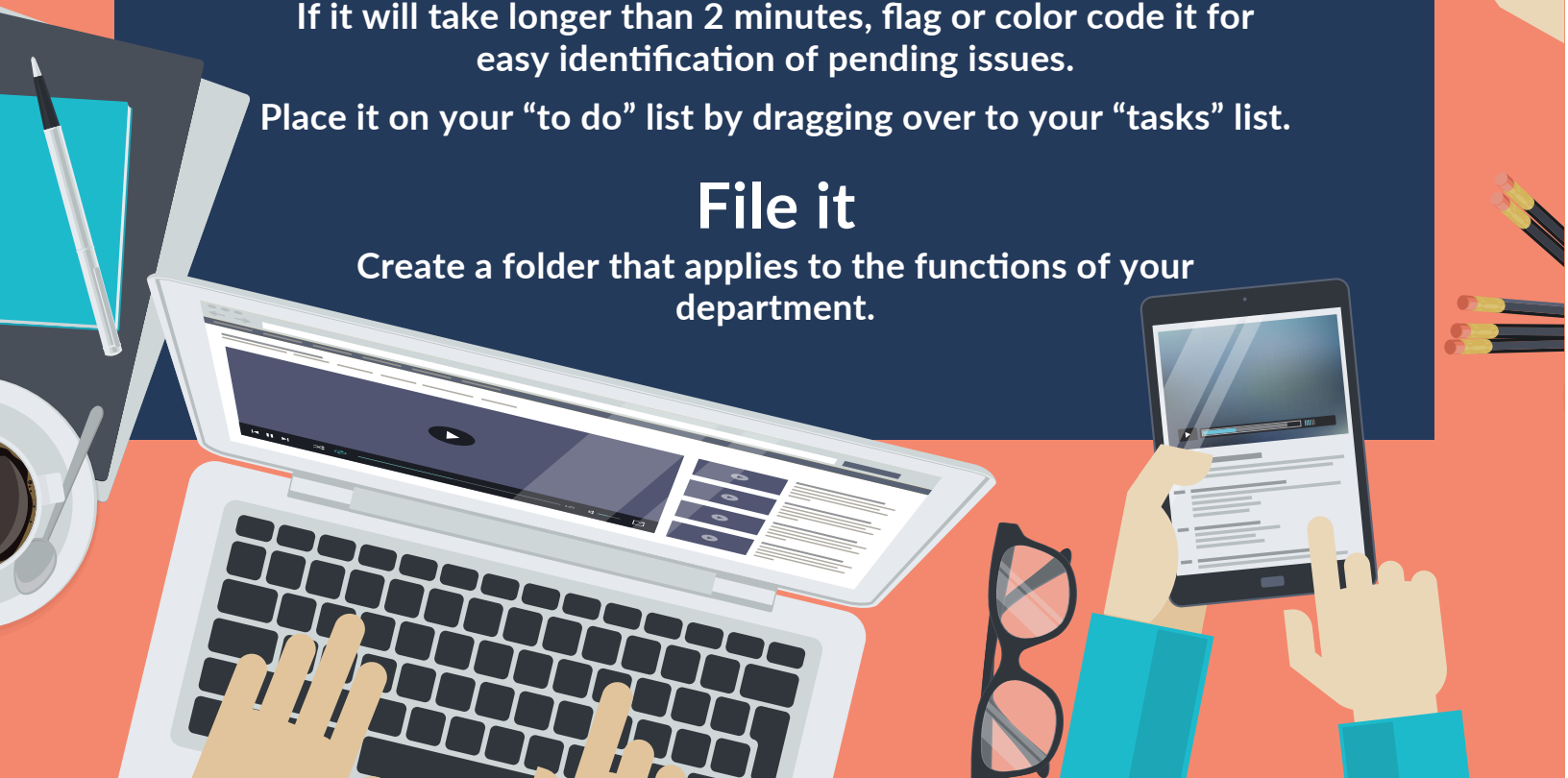**Identify the most appropriate person to respond to the email. Delegate and delete.**

## Defer it

**If it will take longer than 2 minutes, flag or color code it for easy identification of pending issues.**

**Place it on your "to do" list by dragging over to your "tasks" list.**

## File it

**Create a folder that applies to the functions of your department.**