

Working Remotely: Best Practices for Records Management

The new reality of working remotely requires specific measures related to how information is located, referenced, and stored safely and efficiently.

Refer to [Document Naming Guidelines](#) in Cspace for how to name folders and documents. Correct naming saves time, allows users to locate records efficiently, and results in optimal administrative practices.

TOP 10 records management practices:

- **Use** Concordia's VPN (Virtual Private Network) to access electronic documents.
- **Store** electronic documents in safe locations: shared drives, private drives, *Documentum*, etc.
- **Use** collaborative tools such as shared drives provided by IITS to share documents.
- **Use** collaborative tools such as *Teams* and *Skype for Business* to communicate with colleagues.
- **Use** only professional email systems
- **Dedicate** 30 min. per week to sorting email.
- **Securely store** confidential paper files
- **Securely destroy** confidential paper files.
- **Classify** documents properly.
- **Identify** versions of shared document.

TOP 5 habits to avoid:

- Do not store documents on a desktop or USB key.
- Do not communicate exclusively by email.
- Do not keep paper files on domestic surfaces such as kitchen tables, etc.
- Do not use free cloud services to share documents: Dropbox, etc.
- Do not create several duplicates of documents.

Refer to the [Records Classification and Retention Plan \(RCRP\)](#) for timeframes related to the retention of documents: how long records must be kept and their final dispositions toward meeting legal, fiscal, administrative, and historical values.

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