10 Record Management Practices

CoreData digital workspace solution has a powerful user group that includes the most qualified record managers who leverage the CoreData solution capabilities for their Information governance.

They use the solution to keep their information organized and searchable at all times and educate employees to be record-minded users.

Record managers' knowledge has been collected over the years through organizing records and managing business files. Record management is not only about document management. It also maintains evidence of activities/tasks, transactions, and decisions at the same time they connect internal processes and has a keen insight into the routines of regular employees.

The key people for organizing and managing files in every organization are record managers. They are the ones who consistently address information Governance challenges such as a flood of unstructured information as well as the creation of new processes, rules, and guidelines for keeping things in order.

In smaller organizations and companies, hiring a full-time record manager might not be an option, but renting one is an ideal and affordable way of making sure your records are kept secure and organized. Providing that kind of service to its clients is preferable when implementing software solution or reorganizing strategy for information governance.

In this document, we present 10 record management practices that can help you improve your information governance.

Be organized in structuring your **Information Governance**.
The more logic and intuition in the structure, the higher the chances are your employees will understand it and use it.

Finding **"super users"** among your employees who can act as positive examples to others and be responsible within a specific department or a team for keeping data in place is a good way of building a record-keeping culture.

Establish an **organization-wide naming policy** to ensure mutual understanding of how to name data of any kind throughout the organization. This will prevent situations where every department and team creates its own logic for metadata and rules for naming files, projects, tasks, contracts, etc.

The objective of **projects and task monitoring** is to track and ensure project quality and effectiveness. Define your preferable fields as mandatory and you'll always be able to filter out the information you need to find or follow up on for projects and tasks.

Set **reminders** to be notified when certain projects and/or tasks come to their due date.
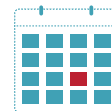
Have a clear overview of internal and external users and user groups connected with permission rights to ensure that the right people have the right access at the right time. This overview gives you a secure **access management of your digital workspace.**

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Templates are time-savers!

CoreData provides a perfectly easy and simple way to create and update your project, task or document templates which cannot just save time for your employees but also prevent mistakes and information gaps. You can pre register metadata needed in your project, task and document for all kinds of processes within your organization.

Having a **smart search feature** in your digital workspace that provides instant search results based on the content of files, tags, projects, contacts, and record types is valuable. What adds value on top of that is teaching your employees to search for data they need using metadata to be even more efficient.

Ability to register a **comment to a project, file and/or a task** that is especially valuable in your digital workspace. You can even have private electronic sticky notes on your files for your eyes only.

Being **patient, helpful, and approachable** at any time for your employees can contribute significantly to your success in the role of record manager.

We hope you have found in this list at least one item that you can use to improve the information governance in your organization. If you have a question or situation that you think we might help you with, feel free to contact our experienced consultant team at coredata@coredata.is

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