Module 1: Create
Introduction

Creating and keeping important and useful information helps everyone work more effectively and ensures that Curtin meets its legal obligations.

On successful completion of this module you will be able to explain the importance of creating and collecting useful and reliable information.
Why is Curtin’s information important?

All information created, received and used in performing services for and on behalf of Curtin, is owned by the University. This applies to information used by Curtin staff members, contractors, volunteers and contractors. Curtin’s information is valuable because it:

- assists with the smooth running of business
- helps build our organisational knowledge
- provides evidence of actions and decisions
- demonstrates Curtin's accountability.

The information that you create and use at work may also be referred to as a 'record'. Although there are some differences between records and information, at Curtin we use the term interchangeably and manage them in the same way.

Curtin has a legal obligation to keep records of its activities and has developed procedures that will help you ensure its information assets are of good quality and can be found, used, shared and kept for as long as required. Your role in this is critical.

Please familiarise yourself with Curtin's records and information management policies and procedures.
What information do I need to create?

Information creation can be costly, so ensure that it is relevant and adds value to what you do at Curtin. Before creating or collecting new information, spend a little time thinking about what information you actually need to support the activity it relates to. Here are some points to consider:

- What activity will the information be supporting?
- Who will be using the information and for what purpose?
- When will they need to use the information?
- Could the information be useful for other activities at Curtin?
- What level of detail and what specific details are required for these activities?
- Are there any legal requirements to create the information?
- In what format would the information be most useful?
- Is the information already available somewhere else? (internally or externally)
- What is the most reliable or authoritative source?
- How can the information be most cheaply and easily created or collected?

But how do I know if information I create and use is reliable?
What makes information reliable?

For information to be useful, people must be able to rely on it. Reliable information accurately reflects what occurred, what was communicated or decided or what action was taken. It should be able to support the needs of the business and can be used to provide evidence of your actions.

When creating information, ensure it is reliable by considering the following quality checklist:

**Accurate:** Have you checked your facts? Is your source reliable or authoritative? Have you considered and documented perspectives other than your own?

**Complete:** Have you covered all the essential facts of the matter? Consider the Who, What, When, Where, Why and How.

**Meaningful:** Will the document be meaningful to others? Ensure you provide all relevant contextual details, especially the date.

**Comprehensive:** Is the document part of a comprehensive set of documents? Make sure activities are consistently recorded over time.

**Compliant:** Does any legislation affect the required content?

**Authentic:** Does the document look official? People will be more likely to trust the document if it has been appropriately presented and authorised.

**Inviolate:** Has the document been appropriately stored and protected? To be able to trust the content you need to ensure that it can’t be altered without authorisation (see Store and Protect for more details).
Think about what this means for the information you create.
What makes information reliable?

Can you identify the characteristics of reliable, high quality information? Review each document below and answer the question.

Click on the example below that is more ACCURATE

1

From: Max O'Bilgen
To: Leanne Smith
Cc: 
Subject: Alison

Hi Leanne,

Last week, Alison called to ask for an extension because her grandmother died. She needed more time, so I gave her another week.

Max

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File Note

<table>
<thead>
<tr>
<th>Date</th>
<th>Wednesday June 3rd 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Number</td>
<td>12345678</td>
</tr>
<tr>
<td>Subject</td>
<td>Alison McArthur</td>
</tr>
<tr>
<td>Author / Area</td>
<td>Max O'Bilgen</td>
</tr>
</tbody>
</table>

Today Alison McArthur (student number 12345678) contacted me requesting an extension on her final assignment for Business Ethics 300 as her grandmother had died. I have granted her a one week extension.
What are the benefits of good information management?

Effective information management leads to greater productivity by reducing the time spent locating information. It also results in:

- better decisions based on complete information
- more efficient and effective work practices
- consistent and collaborative workgroup practices
- better resource management
- support for research and development
- support for teaching and learning
- preservation of vital and historical information.

Records & Information Management is responsible for overseeing the management of Curtin’s information management processes and systems as well as identifying strategies for improvements.

We provide services, systems and support to help you manage and keep quality information.
How is information managed at Curtin?

Curtin is considered a state government organisation under the *State Records Act 2000* and therefore has a legal requirement to manage its information. To do this Curtin has developed a Recordkeeping Plan (staff login required) which sets out how Curtin manages its information and identifies strategies for improvements.

Who is the owner and who is responsible?

Information that you create and receive as part of the work you do at Curtin is owned by the University. Every staff member, academic and general, is responsible. You must make sure you create, capture, maintain, keep secure and dispose of information that documents the business activities, transactions and events in which you take part.

The good news is that by following Curtin's Information Management Procedures and Advice and by using Curtin's information systems and tools, you'll be meeting your legal responsibilities.
What are my responsibilities?

As a Curtin staff member, your information management responsibilities are to:

- find out what information your area creates, where it is located and how it is managed
- create information to support the work that you do
- capture information into the University’s information systems
- protect the information from unauthorised destruction and use
- only dispose of information in accordance with Curtin’s Recordkeeping Policy.

In addition, managers are responsible for making sure that their staff are aware of their information management responsibilities.

Managers can find out more about their responsibilities for managing information at Curtin in the Managers’ Toolkit.
What types of information are there?

Some information is more valuable to Curtin than other information. Understanding the value can assist with determining how to manage the information. Curtin information can be categorised as below:

**University information**

These are the significant business documents without which we could not function. They are usually the *originals* of documents that are required to support and provide evidence of business operations, decisions and authorisations. They also support planning.

**Ephemeral information**

These are working documents that can be destroyed when their usefulness or reference ceases. These are documents and contain little or no long term value to the University. Most of the time these documents are duplicates of original documents or are very early drafts.
Here are some examples:

**University information**
- committee minutes and agendas
- policy and procedures
- official reports
- university publications
- research data
- significant drafts
- some external publications
- documented decisions/authorisations
- financial, legal & historical documents
- original student documents
- original staff documents
- contracts/agreements.

**Ephemeral information**
- duplicates of original documents
- external advertising material
- lunch appointments
- trivial exchanges [e.g. thank yous]
- reference material
- external publications
- early or rough drafts
- copies of staff documents
- copies of student documents
- copies of invoices/payments
- personal non work related emails
What do I need to keep?

I use documents that relate to so many areas. What information is it my responsibility to keep?

Do I need to keep University information?

You need to keep information if you are the:

- originator of the information
- area responsible for the function
- recipient of information from external source requiring action
- area responsible for responding.

Do I need to keep ephemeral information?

Ephemeral information should only be kept as long as there is a business need to do so. Identifying ephemeral information simplifies its disposal. For example, clearly marked copies are quick to deal with when their usefulness ends.
Tips for creating records

The following tips will help you create records that will be easier to find, use, share and keep, now and in the future.

- Meaningful document names make it easier for people to find documents. Use terms that accurately describe the subject or topic.
- If you need to make a note on a document write directly onto the document itself if it’s in paper format or attach a comment to an electronic document.
- Post-it® notes should only be used to convey low value information. Do not use Post-it® notes to convey high value information. Instead write high value notes directly onto documents so the information is not lost when the adhesive deteriorates and the note falls off.

- Make file notes of any significant telephone conversations including the date, author and position title, and save them into the electronic folder or place them in the paper folder.
- Make sure meeting minutes are well documented and captured on file.
- Research information and/or data constitute a University record.
- Remember that most student work (e.g. assignments) that belong to the student should be returned to the student.
Want more tools and advice for creating information?

Records & Information Management can provide you with more tools and advice for creating information. To find out about our face to face training sessions, browse through the RIM Training.