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| Onboarding Supplement - Record Keeping Checklist |
| When commencing at UQ or when moving across to a new role, ensure that you are familiar with the policies and procedures that outline record keeping obligations.  Make a point of talking with your manager/supervisor about the information systems and record keeping practices required in your business area. This is a good time to plan for capturing information with record keeping as part of this plan, helping to make your obligations more seamless by design.  This checklist is designed to be used in conjunction with UQ’s [Onboarding checklist](https://staff.uq.edu.au/information-and-services/human-resources/induction-exit) |
| What record keeping systems are used at UQ? |
| A close up of a ball  Description automatically generated with low confidenceThe University has an enterprise level document control and records management system known as **TRIM** (Product name:  Micro Focus Content Manager) that is the central system for the capture and maintenance, at a minimum, of vital, high-risk, high-value and permanent retention records. It is also used by some organisational units as a document control system for everyday documentation. The documentation/records can cover the full spectrum of information security classifications, including sensitive and protected categories.  However, there are many systems being used at UQ for different business units, that is why it is essential you discuss with your manager where the records you create are to be kept.  Image result for important  It is essential you ascertain and understand what vital, high-risk, high value and permanent records are at UQ and your responsibility regarding these records.  Please review UQ’s Records Governance KNOW HOW – Vital, High-Risk, High-Value and Permanent Retention (V, HR, HV, PT) records [ADD LINK TO WEBSITE DOCUMENT HERE] |

Record keeping planning checklist

### Information/Data – Business as Usual (BAU) Content TRIM ACCESS

* Am I required to have TRIM access?
  + If yes, have your manager notify Records Governance team via email, at [uqcentralrecords@uq.edu.au](mailto:uqcentralrecords@uq.edu.au), to confirm and ensure your TRIM access.
* Have I already been set up with TRIM access?
  + Please email the Records Governance team at [uqcentralrecords@uq.edu.au](mailto:uqcentralrecords@uq.edu.au) to discuss and arrange TRIM training and access to the TRIM Training Hub**. [ADD LINK TO TRAINING HUB]**

**OR**

### OTHER RECORD KEEPING SYSTEMS

* Where do I save my BAU documents?
  + Does our Business Unit use a specific platform eg, SI-net (Student information)
* Will I be creating any vital, high-risk, high-value and/or permanent records in my role?
* Who is your business unit’s records custodian?
  + Is that the same person I can go to for advice on capturing BAU documents?
* Does your business unit have a file plan for emails?
  + Which emails do I have to save/capture?

## ICT Systems used and key processes

* What ICT systems will I be using?
* What are my key processes?
  + Where will I find this information?
* Will I be using One Drive, SharePoint, Teams and/or other applications?  
  What level of information security/classifications and privacy does my position have access to?
  + [Do I need to apply for access for any of the IT systems?](https://staff.uq.edu.au/information-and-services/information-technology)

Please don’t hesitate to contact the Records Governance team at [uqcentralrecords@uq.edu.au](mailto:uqcentralrecords@uq.edu.au) if we can help further.