

ONENOTE



Microsoft Office OneNote is an electronic version of a paper notebook. It can be used for online/offline note taking and organizing research and project materials. This guideline provides a brief overview of employees' recordkeeping responsibilities.

1. Recordkeeping Responsibilities

Employees need to create and keep complete and accurate records sufficient to document their decision-making and work activities. This applies to all types of government records, including those OneNote notebooks and attachments that provide the best evidence of government business activities, transactions, policy or decisions.

OneNote records need to be managed in accordance with government records schedules ([ARCS](#), [ORCS](#), and [Special Schedules](#)).

Employees generally use OneNote to create and capture calculations, preliminary drafts, and working materials. Typically, OneNote notebooks/pages will only be required for short-term reference use. Once the final record (e.g., a report) has been completed and filed in the [office recordkeeping system](#), the notebooks/pages are considered [transitory](#) and may be destroyed.

In some cases, the relevant records schedule will require the ongoing retention of OneNote notebooks/pages and working materials. Examples include:

- Working materials relating to the preparation of legislation or audit reports.
- Treasury Board and Cabinet submissions.
- Working drafts that contain significant annotations, comments, and revisions.
- Originals or copies required for statutory purposes.

2. Filing Records in an Office Recordkeeping System

Government records schedules apply to all forms of records, including OneNote notebooks/pages. Storing and managing OneNote notebooks in employee-specific network drives is **not** equivalent to filing them in the office recordkeeping system.

Limitations of leaving notebooks in unshared drives include:

- **Restricted access:** No one else has access to the notebook and its contents.
- **Difficulty searching for records:** Records may be missed when responding to search requirements for a request under the [Freedom of Information and Protection of Privacy Act \(FOIPPA\)](#) or during the document discovery process for litigation.
- **Incomplete records** in the office recordkeeping system.

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3. Managing and Sharing Records

If you are sharing a notebook with other employees/team members, determine who will retain and file the official copy of the notebook and its contents (e.g., document revisions, drafts, research, web pages, audio and video recordings, and other related work products).

4. Personal Notebooks

If you create a personal notebook, keep it separate from the office recordkeeping system. Don't mix personal notes/research and government records in the same notebook.

Additional Information

Contact your [Records Officer](#) or check out the rest of the Records Management website.

