



OneNote

Microsoft Office OneNote is a digital notebook that allows you to create, organize, and share notes, working drafts and project materials (e.g. photos, audio and video clips).

This guideline provides a brief overview of your recordkeeping responsibilities as a government employee when using OneNote.

Recordkeeping responsibilities

Government bodies need to create and keep adequate records sufficient to document their decision-making and work activities. This applies to all types of government records, including documents in all formats and workspaces that provide the best evidence of government business activities, transactions, policy or decisions. These records must be managed in accordance with government records management policy and standards.

Responsibilities:

Government bodies are responsible for ensuring that there are appropriate systems in place for creating and maintaining adequate records of decisions, including:

- recorded policies and procedures
- defined roles and responsibilities
- appropriate [recordkeeping systems](#)
- ongoing training and awareness
- compliance monitoring programs

Employees are responsible for documenting their work by ensuring key records they create or receive are filed in an appropriate recordkeeping system.

Additional Information

Contact your [Records Team](#) or check out the [Records Management website](#).

Under the [Information Management Act](#), government bodies must ensure that an appropriate system is in place for creating and maintaining government information. For more information on what constitutes an appropriate system see the [Documenting Government Decisions](#)

OneNote records need to be managed in accordance with [information schedules \(ARCS, ORCS, and Special Schedules\)](#). Once the final record (e.g. a report) is complete and filed in an appropriate recordkeeping system, the notebooks/pages are considered [transitory](#) and may be destroyed.

Filing Records in a Recordkeeping System

Information schedules apply to all forms of records, including those created using OneNote. Storing and managing OneNote notebooks in employee-specific network drives is **not** recommended.

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**
Key records may not be classified and filed appropriately.

Managing and Sharing Records

When sharing a notebook with other employees/team members, decide who will retain and file the official copy of the notebook and its contents.

Personal Notebooks

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