IM@WORK FOR MY TOWN: BEST PRACTICES THROUGH THE INFORMATION LIFECYCLE

Module 2.2: IM Best Practices - Creation

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Welcome to Module 2: Creating

- **In Module 2.2 you will learn to:**

  - Identify when creation of information occurs and potential sources/formats

  - Identify qualities of good records and information

  - Use best practices and tools when creating information

The Information Life Cycle

Collect

Create

Receive

Organize/Store

Use/Share

Retain/Dispose
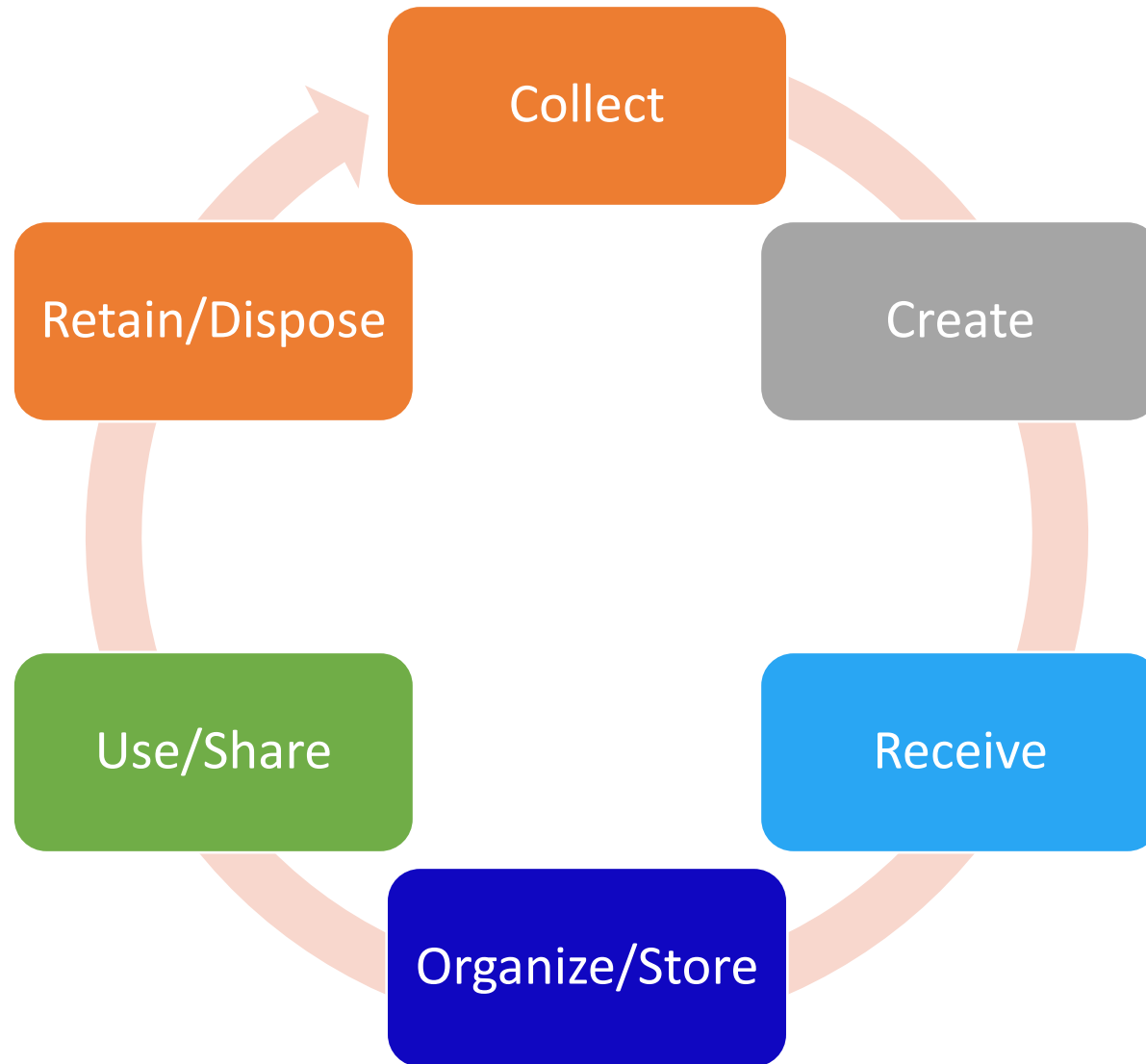
Creation

- Have you ever been asked about a meeting, property, building or project that occurred before you started with the Town?

  - Do the records that exist contain sufficient detail to enable future users of that information to understand the activity, transaction or decision?

  - Records need to be able to stand on their own as a reflection of the event, activity or transaction.

Think about our damaged bridge....
One issue or event may result in many types of information being created as the problem is resolved

Taxpayer Identifies Safety Concern

Email Photos to Councilor

Councilor Raises Awareness

Assessment and Response

These are some types of information may result from one event or issue

Communicate to Stakeholders

Media Inquiries and Responses

Website and Social Media Notices

Assessment Records

Legal Action

Designs

Meetings and Council Approval

Tender and Contracts

Construction

Invoices & Payments

What is Creation?

- Creation is when the town uses information at its disposal to create a new information product

- Creation is often driven or flows from an internal requirement (e.g., new funding grant, council minutes)

- Typically, you will use internal desktop tool like word processing, spreadsheets, email, etc.

- Responds to an assigned task (e.g., monthly council meeting agenda)

- May contain personal or confidential information depending on the natu the document. This means that it needs to be protected at all stages

What is Creation?

- Everyday you create information to document events, business functions or activities using:
    - Software like Microsoft Word, Excel or PowerPoint
    - E-mail
    - Business applications including databases or systems designed to support your processes (e.g., Townsuite or accounting software)
    - Pen and paper
- Your goal is to create information that accurately reflects the activity or business function you are documenting.

Qualities of Good Records

Authenticity: An authentic record is one that can be proven to be what it purports to be, to have been created or sent by the person purported to have created or sent it, and to have been created or sent at the time purported. (Source: ISO 15489-1: 2016)

Integrity: The assurance that information is accurate, correct, and authentic by using consistent methods to create, retain, preserve, distribute, and track information (Source: ARMA).

Usability: means that the record can be found and used effectively when needed. Records are to remain accessible and legible throughout the duration of their lifecycle.

Creating Good Records

When creating a record, it is important to ensure the record is:

Comprehensive: contains all elements required to document a complete decision, transaction, process etc.

Accurate: the information contained in the record, correctly reflects the decision, transaction, process etc.

Complete: in addition to the content of the record, it contains the structure and context required to understand the decision, transaction, process etc. being recorded

Documents the regular course of business/operations: activities necessary, normal and incidental to the business are followed when a record is created

Created within a reasonable time period: aids in the of clear, accurate content

Creation

- Know the intended audience and how information will be used to focus on the appropriate detail, language and content

- Choose the right tool to communicate the information:

  - Don't write a short e-mail when what is really needed is a full decision document or position paper

  - Do you need to create a new piece of information, or would a meeting or quick phone call be a better way to communicate?

- Have a consistent approach to managing drafts or versions
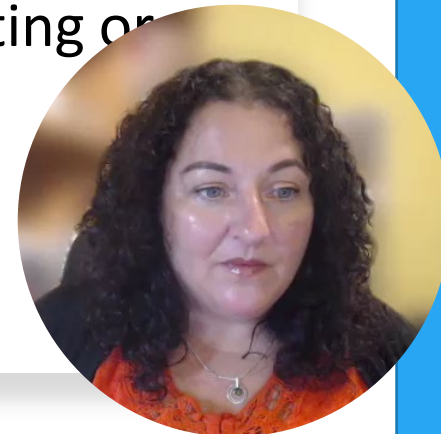
Creation

- Use the most up to date form or template

- Review information to ensure that it is clear and accurate

- Use established naming conventions to label documents and files

- Remember that working papers that are used in the preparation of a subsequent record may be considered transitory in which case they can be securely deleted or destroyed when no longer required

Creation

- *The Municipalities Act*, Section 215 overrides ATIPPA 2015:
  - The following types of documents must be available for inspection by the public
  - Limit personal or confidential information when you create these records where possible
  - For example, table council records without identifying individuals where possible

Adopted Minutes of the Council	Assessment rolls	Regulations
Municipal Plans	Opened Public Tenders	Financial Statements
Auditor's reports	Adopted Budgets	Contracts
Orders	Permits	All do tabled/a Council a meeti

Creation

When composing an e-mail:

- Use a detailed subject line that reflects content

- Include sufficient information so that an individual not directly engaged in the process will understand the content

- Copy only those individuals that need to action or must be informed

- Ensure that the information recorded is accurate

- Double check data entered into a business application or system
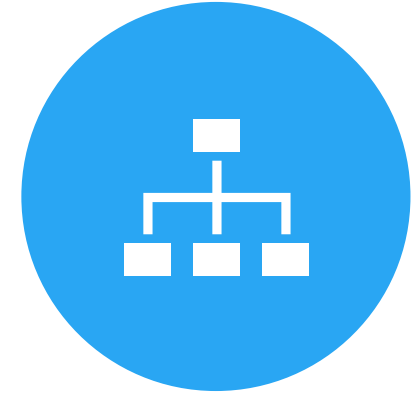
About IM@Work For My Town

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MODULE 2: BEST PRACTICES

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2.2: CREATION

2.3 RECEIVING

2.4: ORGANIZE/STORE

2.5: USE/SHARE

2.6: RETAIN/DISPOSE

MODULE 3: ROLES AND RESPONSIBILITIES

References

- *Creating and Capturing Records,* Archives of Manitoba Government Records Office: https://www.gov.mb.ca/chc/archives/gro/recordkeeping/docs/creating_records.pdf
- *Guideline: Email Management*, Office of the Chief Information Officer, Government of Newfoundland and Labrador: https://www.gov.nl.ca/exec/ocio/files/guideline-email-management.pdf
- *ISO 15489-1: 2016 Information and Documentation: Records Management*: https://studylib.net/doc/25344324/iso-15489-1-2016
- Naming Conventions for Electronic Files and Folders, York University: https://ipo.info.yorku.ca/tool-and-tips/tip-sheet-6-naming-conventions-for-electronic-files-and-folders/
- *Standard for Forms Management and Design*, Government of British Columbia: https://www2.gov.bc.ca/assets/gov/british-columbians-our-governments/services-policies-for-government/service-experience-

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