

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



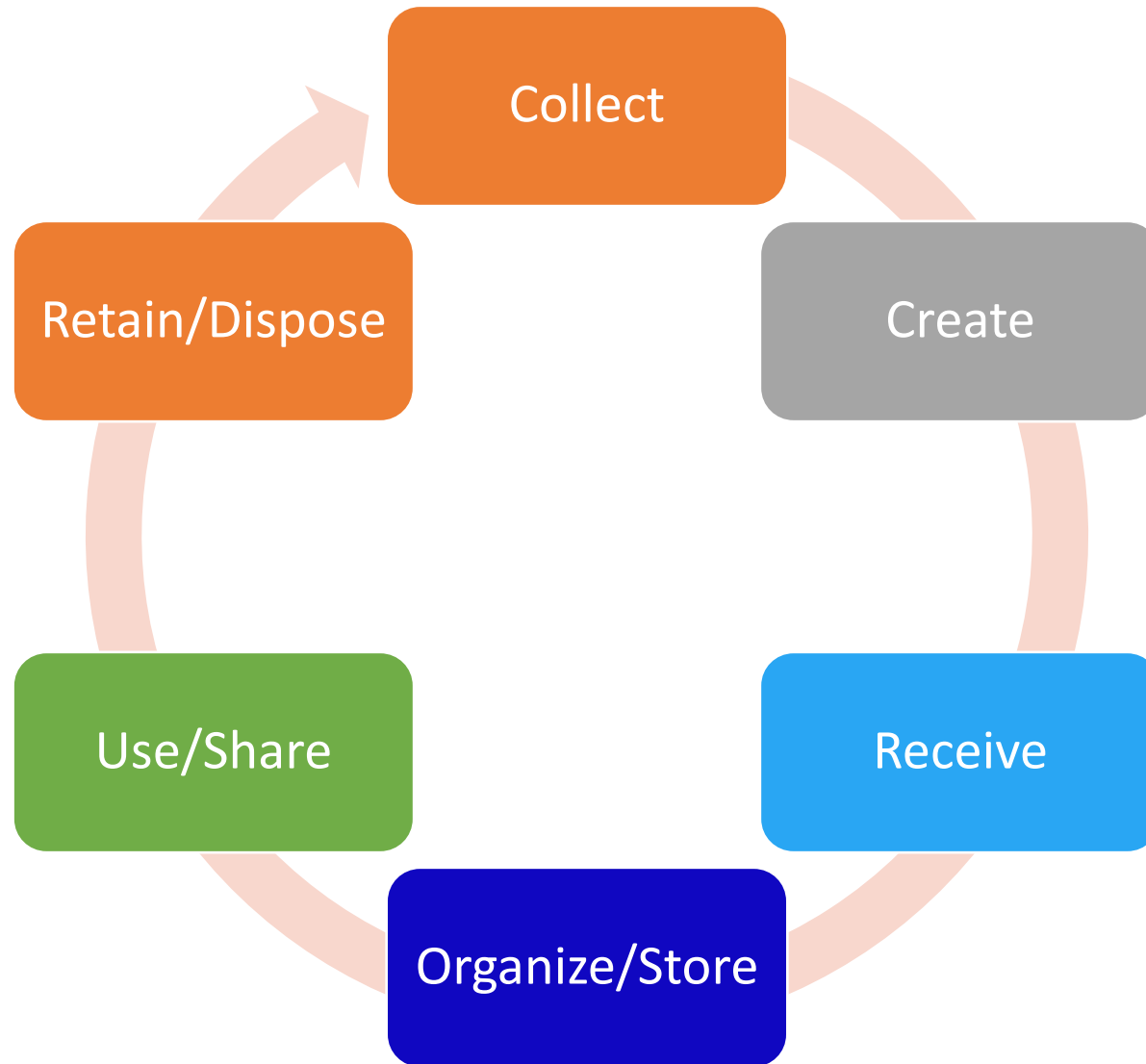
***Module 2: IM Best  
Practices – Organize  
and Store***

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# Welcome to Module 2.4: Organize and Store

- **In Module 2.4 you will learn to:**
  - Understand why organizing and storing is critical
  - Identify risks to information at the point it is organized and stored
  - List tools to support efficient organizing and storing

# The Information Life Cycle



# Organize/Store



- Imagine there is an ATIPP request that asks for all the records related to the purchase and renovation of the recreation facility which has been around since 1988!
- The town has a limited time to complete a search of all its information holdings. If the town does not respond within the time limit, the requestor has the ability to file a formal complaint.

# Organize/Store

- Organization occurs when a Town user classifies information for the purpose of storage
- Follows collection, creation or receipt
- Is essential to:
  - Linking the information to the business process
  - Applying access controls to minimize unauthorized access
  - Aiding future retrieval
- Using the RRDS as a basis for organizing information is a best practice that aids retrieval and minimizes retention of unnecessary information

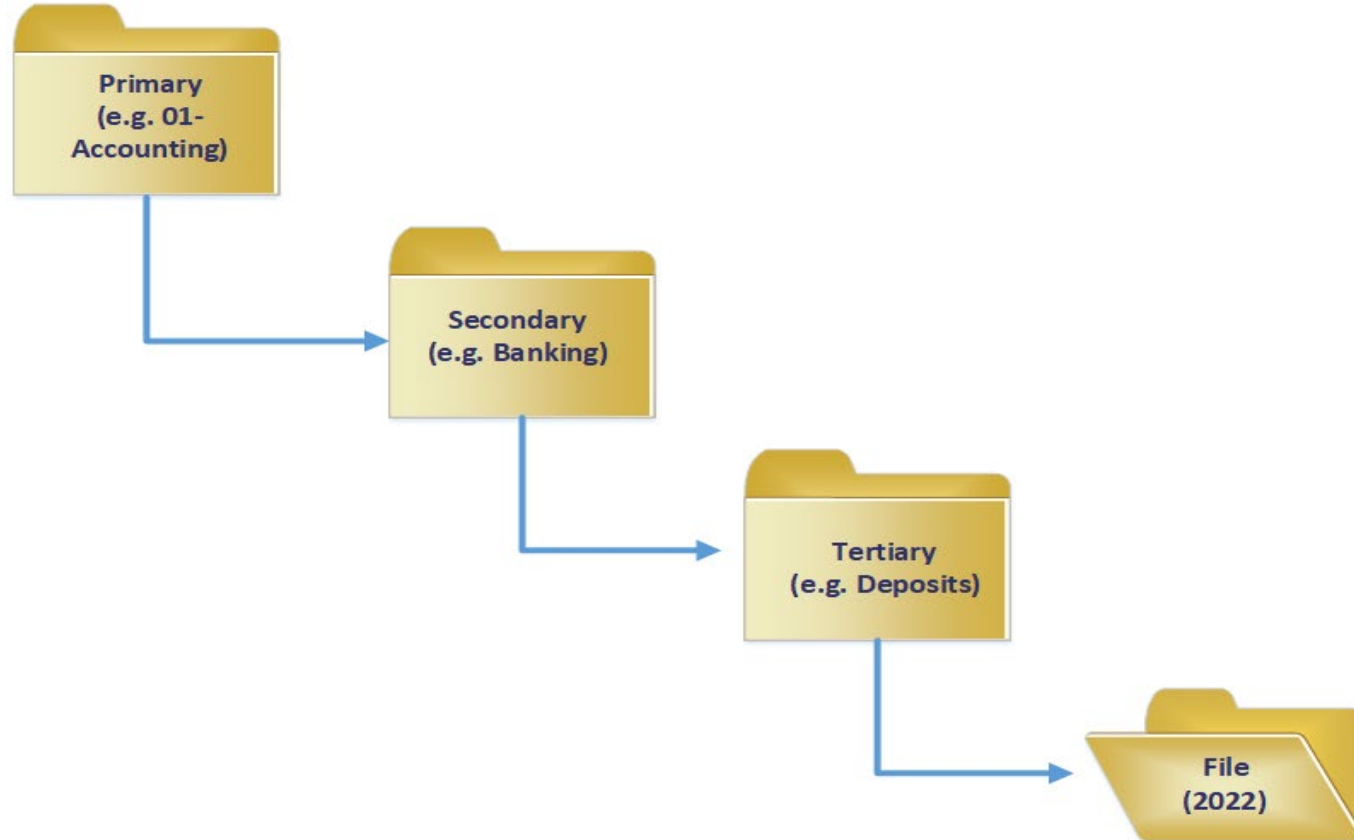
# Organize/Store

- Risks to information organization/storage include:
  - Mislabelled or filed information may be lost forever
  - Delayed access to information
  - Wasted time spent locating poorly organized information
  - Unauthorised access to information that is not organized properly

# Organize/Store

- Every process, service or program you provide results in a record or a group of records. These are referred to as a record series
  - Record series have the same management requirements as access control, retention period, etc.
  - There is often a file for each time the process occurs
  - This is where the record series requirements are applied

# Sample File Plan/Record Series



- Close the File at the end of the fiscal year
- Based on the RRDS, these records are securely destroyed after 7 years



# Organize/Store

- Understand the business process – how does information flow through the town?
- What records are generated to support the business
  - Paper
  - Systems
  - Electronic
- Who creates, uses and shares these records?
- What is the best way to organize these records to support operations and ongoing access?
- What triggers disposal – time or event based?

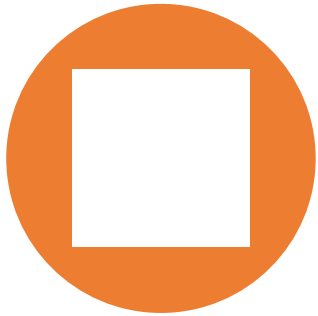
# Organize/Store

- Use the Town's approved records retention schedule
- Consult the Town Clerk when planning to:
  - Reorganize existing records series
  - Dispose of records
- Organizing information can make it easy to find and secure access to information
- A naming convention:
  - is a generally agreed structure for naming records/files
  - Describes what they contain and how they relate to other files
  - Helps to quickly identify and retrieve information

# Organize/Store

- Town records are organized according to direction of the Town Clerk.
- Town records are stored in secured storage locations as directed by the Town Clerk.
- As a Town User:
  - Know where you are supposed to store your information
  - Only access storage locations you are permitted to access
  - Apply security measures for storage
  - Follow procedures for physical storage (e.g., sign out sheets)
  - Do not use your hard drive for storage unless directed by the Town Clerk

# Organize/Store



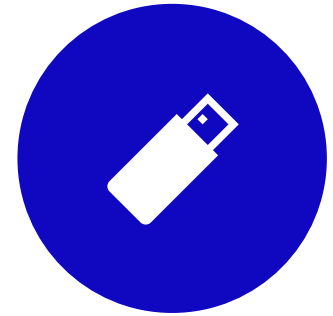
**ONLY USE REMOVABLE MEDIA  
APPROVED BY THE TOWN CLERK**



**REASONABLE SECURITY  
MEASURES MUST BE USED TO  
TRANSPORT AND STORE  
REMOVABLE MEDIA.**



**REMOVABLE MEDIA IS  
PASSWORD PROTECTED  
AND/OR ENCRYPTED.**



**RECORDS STORED ON  
REMOVABLE MEDIA ARE  
RETURNED TO THE TOWN'S  
STORAGE LOCATION AS SOON  
AS POSSIBLE.**

# Organize/Store

## Best Practices:

- *Passwords* – ensure they contain a combination of letters, numbers and symbols and refrain from using the same password across multiple accounts
- *Backups* – complete them often and routinely to ensure information is protected
- *Access Control* – only give access to authorized personnel
- *Naming Conventions* – ensure they are uniformly applied by everyone
- *Version Control* – ensure reference documents are kept up to date and employees do not use outdated information

# About IM@Work For My Town

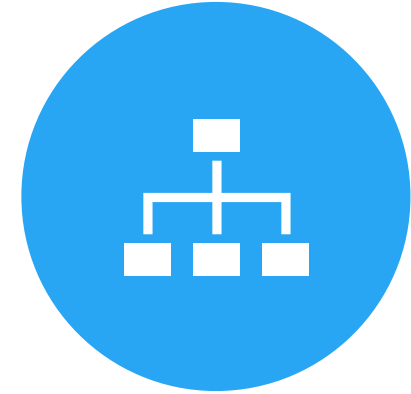


## MODULE 1: IM BASICS



## MODULE 2: BEST PRACTICES

- 2.1: COLLECTION
- 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](https://www.gov.mb.ca/chc/archives/gro/recordkeeping/docs/creating_records.pdf)
- 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/>
- Version Control Guidance, University of Glasgow:  
[https://www.abdn.ac.uk/staffnet/documents/policy-zone-information-policies/UoA\\_Version%20Control\\_July%202017.pdf](https://www.abdn.ac.uk/staffnet/documents/policy-zone-information-policies/UoA_Version%20Control_July%202017.pdf)
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