

IP3 TEAM Canada Case Study Proposal

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The Canadian Tourism Commission (CTC) proposes to the IP3 TEAM Canada the following case study:

Establishing a Recordkeeping System for Records with Unstructured data Utilizing Shared Drive

Given the fact that the CTC does not have a Records Management program, this case study will involve both building the foundations of the program, i.e., establishing policies, procedures, and tools, and utilizing the currently available technologies to implement the established policies, procedures, and tools. The case study will limit its scope to records generated in the CTC Headquarters as the technologies provided for the project are not available to overseas offices.

Policies, procedures, and tools that need to be established include:

- The CTC Records Management policy
- Various kinds of sub-policies and procedures relating to issues such as records identification, vital records protection, metadata creation (supporting different functions), preservation needs and mechanism identification, etc.
- Classification system, retention schedules, naming conventions, etc.

The technologies currently available for Records Management are

- HQ networked shared drive
- Scanning devices (photocopiers with scanning function)
- Conversion software (CutePDF).

The planned activities include:

- Gaining an understanding of business processes
- Developing policies and procedures compliant with Records Management principles and best practices while taking into consideration the CTC specific needs
- Completing / refining the classification system
- Establishing retention schedules
- Obtaining disposition authorities
- Configuring the shared drive as a centralized repository for records with unstructured data, organized in accordance with the CTC-wide classification system
- Standardizing naming practices at organization, function, and possibly sub-function level
- Keeping records only for as long as they are needed
- Disposing of records by classes
- Developing educational materials and training sessions