UR Source Records & Information Management (RIM) Guidelines

The University of Regina policy on Records and Information Management (GOV-070-005) identifies the processes within which University records are to be managed and maintained through their life cycle. All records that fit the definition of a university record are subject to the policy. Therefore, it is important that university records created or revised and maintained on the university intranet, UR Source, are dealt with in a manner consistent with the Records and Information Management Policy.

UR Source provides opportunities to make information that does not have to be on the public internet available to either the whole organization or selected individuals. In some instances these records may be the official copy of that record and in other instances they may be copies of records that have official versions stored elsewhere (i.e. a shared drive). The responsible office/unit must be aware of the status of each record and insure that the official record is maintained in accordance with the RIM policy. In instances in which a record is stored and maintained in multiple locations (i.e. both an intranet and a T-drive) the “owner” of the record must also insure that version control processes are properly managed so that anyone with access to the record can see the current version and that previous versions of the official record are maintained as per scheduled requirements.

UR Source can also become a significant means of collaboration, facilitating working in groups and activities involving shared input leading to decisions. These dynamics lead to the creation of multiple new university records and ongoing revision of existing records. These records must also be managed in a manner consistent with the RIM policy. Intranet collaboration can mean accelerated progress toward objectives and decisions. The speed and ease of development might create situations in which key steps in a process could be lost as it evolves unless the participants are aware that each of the steps that include substantive changes to a document ultimately result in the creation of a new record that must be maintained throughout the process.

UR Source will be a useful and significant tool. Both records transferred to the intranet for ease of access and records created within the intranet environment will have to be managed effectively in order to document decisions and verify information employed in furthering the aims and objectives of the university community.
UR Source and RIM: What You Need to Know

• All University records need to be managed in accordance with the University’s Records and Information Management Policy GOV-070-005.

• Units need to determine where their official electronic record resides and ensure that this is documented and shared with all current and future record keepers in the area.
  - Shared drive (i.e. T, L, etc. - RECOMMENDED!!)?
  - Public UR Source folders?
  - Private UR Source folders?
  - Website?
  - Specialized software?
  - I (Personal) drive (for preliminary work or confidential records that cannot be managed in a secure shared drive location)?
  - Other (i.e. desktop, external drives) – NOT RECOMMENDED?
  - Cloud?
  - A combination?

• Commit to managing official copies appropriately, and deleting ‘other copies’ as soon as their immediate operational need has passed (while you still know what they are!!).

• Version control is important. Incorporate a standard convention in your area to ensure that versions can be easily sorted, that the progression of a document is clear, and that there is no question about which version is most current.
  - i.e. RecordsCommitteeReport_19June2018_dft1_clb
  - RecordsCommitteeReport_20June2018_dft2_dh

• If you need to reference a document that is managed by another unit, link to it (instead of copying it) wherever possible. This will ensure that your users always have access to the most current information.

• Units are encouraged to consider the potential long-term value (operational and/or historical) of any documents determined to be obsolete during the content audit of their public website. All units have a story to tell – if obsolete documents might be of interest to Archives (or if you aren’t sure), see https://www.uregina.ca/library/rim/procedures-forms/index.html or contact the Archives for assistance.

QUESTIONS?

Please feel free to contact the RIM Program in University Archives. We are here to help!

archives@uregina.ca  585-4014  http://www.uregina.ca/library/rim