



SharePoint Document Deletion or Archive Procedure

This procedure is internal to Service Alberta only.

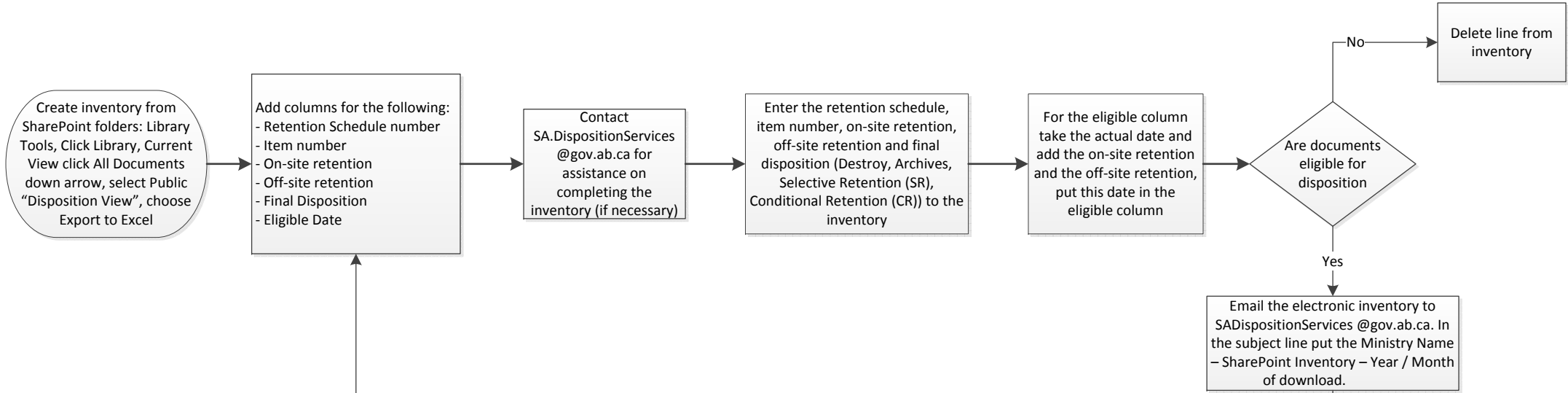
#	Activity	Who
1.	Create an inventory from SharePoint folders by doing the following: Under Library Tools <ul style="list-style-type: none">• Click Library• In Current View, click All Documents down arrow, select under Public “Disposition View”• Choose Export to Excel• After the last column on the inventory add:<ul style="list-style-type: none">○ Retention Schedule number;○ Item Number;○ On-site Retention;○ Off-site Retention;○ Final Disposition; and○ Eligible Date.	End User
2.	Contact Service Alberta, Transfer, Storage and Disposition Unit at SA.DispositionServices@gov.ab.ca if you require assistance in completing steps 3-5.	End User
3.	Enter the retention schedule and item number information to the inventory. <ul style="list-style-type: none">• Enter the on-site and off-site retention.• Enter the final disposition (Destroy, Archives, Selective Retention (SR) or Conditional (CR)).	End User
4.	For the eligible column take the create date and add the on-site retention and the off-site retention, put this date in the eligible column.	End User
5.	Review the eligible date to determine: <ul style="list-style-type: none">• If documents have reached the end of their business activity (closure criteria); and• The total retention period (on-site plus off-site) against the actual date of your documents to calculate whether the records are ready to be disposed of (deletion or archives).	End User
6.	If documents are not eligible for final disposition, delete them from your spreadsheet (inventory list).	End User
7.	Email inventory list to SA Transfers, Storage and Disposition, (SA.DispositionServices@gov.ab.ca). Ensure that the subject of the email follows this naming convention: <ul style="list-style-type: none">• Ministry Name – SharePoint Inventory – Year-Month of download (Service Alberta – SharePoint Inventory – 2015-06)	End User
8.	Review the inventory for completeness and determine the eligibility of disposition. If the inventory is not complete, return to End User.	SA Disposition Staff
9.	For the records that have not met the eligible date, advise the End User that the documents must remain in SharePoint. Delete the line from the inventory.	SA Disposition Staff

10.	Prepare the Records Disposition Notice and email to the Director of the Program Area.	SA Disposition Staff
11.	Review the package to ensure that the records are not responsive to ongoing/potential litigation or FOIP requests.	Director, Program Area
12.	Identify if any conditions exist preventing final disposition from occurring (check boxes on form). If no conditions exist, do not check any boxes.	Director, Program Area
13.	Sign the memo with digital signature.	Director, Program Area
14.	Email the completed package to SA.DispositionServices@gov.ab.ca .	Director, Program Area
15.	If conditions exist, advise the End User that the records are not eligible and why they are not eligible and need to remain in SharePoint. Delete the line in the inventory.	SA Disposition Staff
16.	If no conditions exist, confirm with the End User that the documents can be deleted. Provide a copy of the electronic inventory.	SA Disposition Staff
17.	Delete the eligible documents confirmed by SA Disposition Staff.	End User
18.	<p>Documents that have met their full retention and have a final disposition of "Archives":</p> <ul style="list-style-type: none"> • Create a folder called "PAA – Preserved Records"; and • Move documents to the folder. <p>Note: This is an interim measure to ensure the records are preserved as the Information Management Branch received confirmation from the Provincial Archives of Alberta on August 23, 2016 that at this time they do not have a formal process for accepting GoA records in an electronic format when the disposition of the records series is Archives.</p>	End User
19.	Empty recycle bin.	End User
20.	Notify the SA.DispositionServices@gov.ab.ca when the documents are moved to "PAA – Preserved Records" folder or deletion is complete.	End User
21.	Store all documentation in SharePoint – Master Disposition.	SA Disposition Staff

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May 2018

End User



SA Disposition



Director, Program Area

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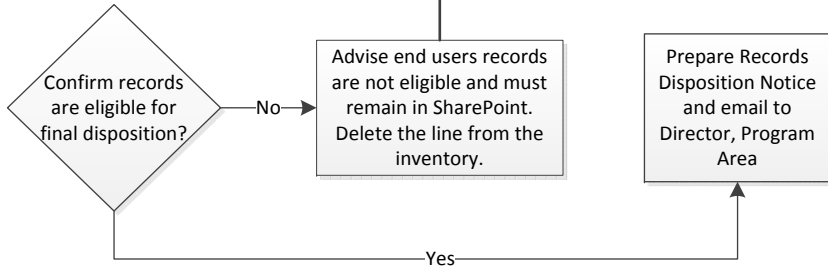
May 2018

End User

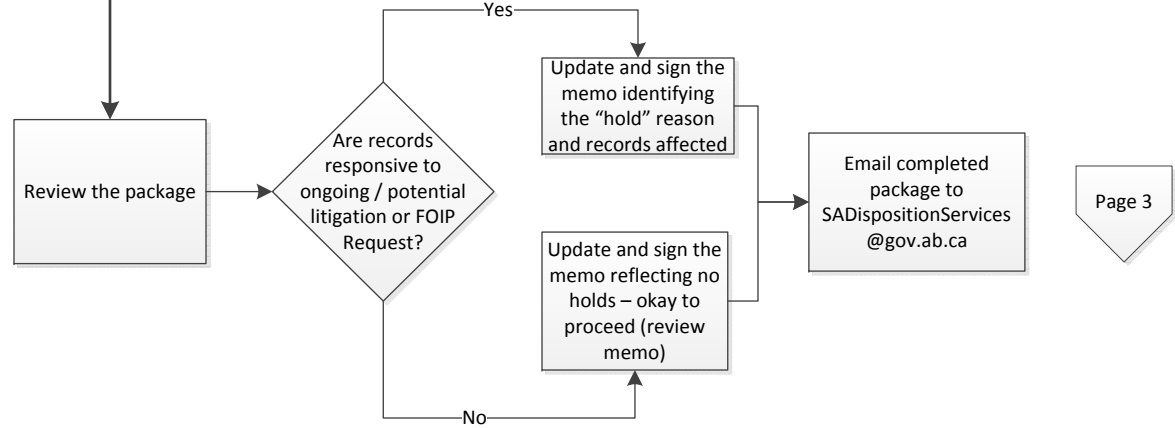
Documents remain in SharePoint until eligible disposal date

SA Disposition

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