



# Shared Drive Document Deletion or Archive Procedures

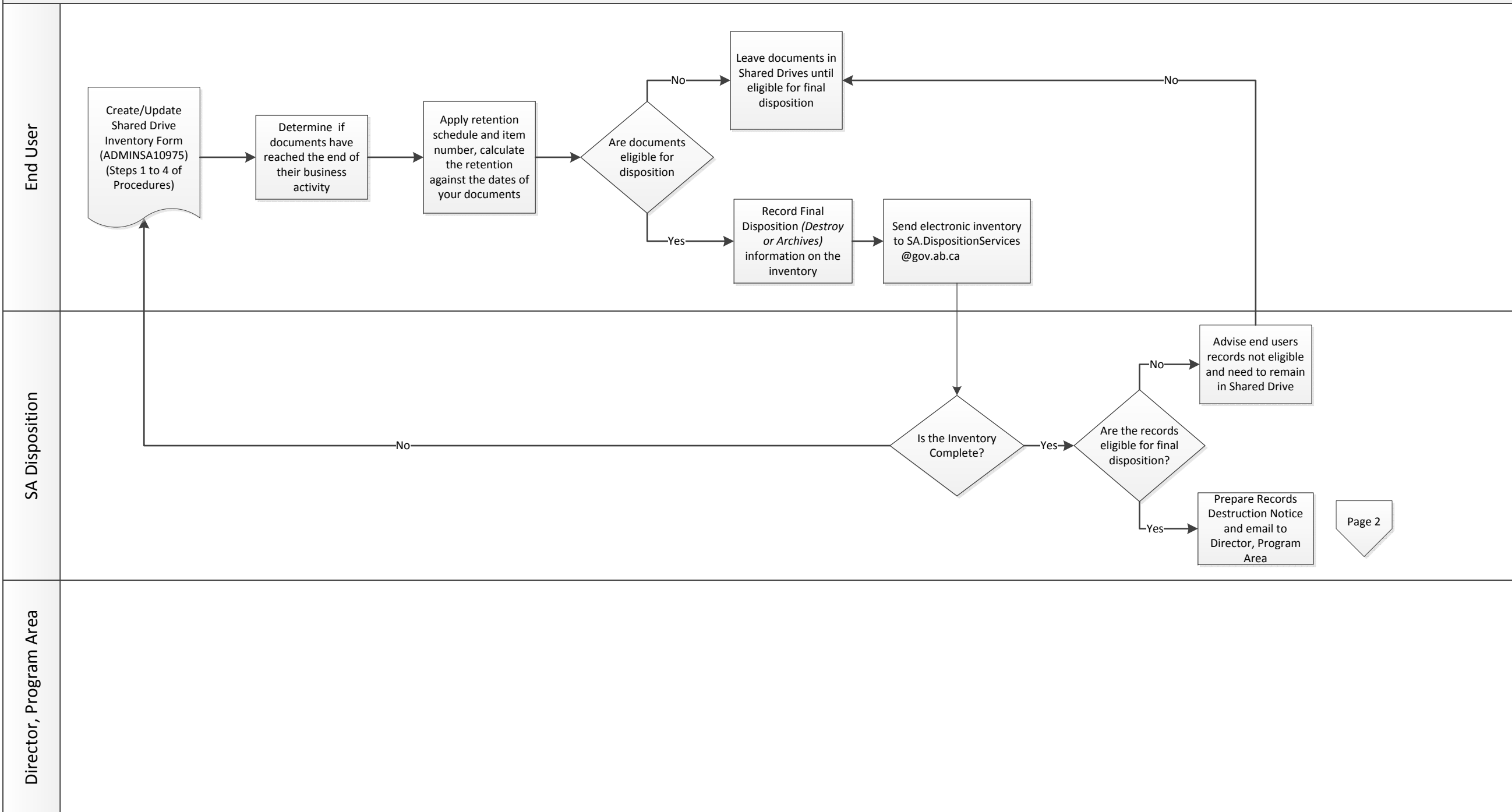
This procedure is internal to Service Alberta only.

#	Activity	Who
1.	Retrieve the “ <i>Shared Drive Document Inventory</i> ” form from the Forms Website ( <a href="https://forms.gov.ab.ca">https://forms.gov.ab.ca</a> ). You may be required to enter your GoA Username (without gov.ab.ca) and Password. <ul style="list-style-type: none"><li>Enter the form number <i>ADMNSA10975</i> in the <i>Search</i> field.</li></ul> Click <i>Search</i> . Open the form. <ul style="list-style-type: none"><li>Click <i>Enable Editing</i>, then <i>Enable Content</i></li><li><i>Save the form before you proceed to Step 2</i></li></ul>	End User
2.	Enter the following contact information: <ul style="list-style-type: none"><li>Name of your Ministry in the <i>Ministry</i> field</li><li>The Branch or Program Name in the <i>Branch or Program Name</i> field</li><li>Name of the person completing the inventory in the <i>Inventoried by</i> field</li><li>Telephone number of the person completing the inventory in the <i>Telephone Number</i> field</li></ul>	End User
3.	Click the <i>Select Location</i> button <ul style="list-style-type: none"><li>Browse to the folder you wish to inventory</li><li>Click <i>OK</i>. The Path of your folder will appear in the <i>Path</i> field.</li></ul>	End User
4.	Click the <i>Get Inventory</i> Button <ul style="list-style-type: none"><li>The <i>Path and Document Name</i> and <i>Date Last Modified</i> fields will be populated.</li></ul>	End User
5.	Review the Records Retention and Disposition Schedule to determine: <ul style="list-style-type: none"><li>If documents have reached the end of their business activity (closure criteria).</li><li>The total retention period against the date of your document to calculate whether the records are ready to be disposed of (deletion or archives).</li></ul> Contact <a href="mailto:SA.DispositionServices@gov.ab.ca">SA.DispositionServices@gov.ab.ca</a> for Records Retention and Disposition Schedule questions.	End User
6.	If documents are not eligible for final disposition, delete them from your spreadsheet (inventory form).	End User
7.	If documents are eligible for final disposition: <ul style="list-style-type: none"><li>Enter Records Retention and Disposition Schedule in the <i>Records Retention and Disposition Schedule Number</i> field</li><li>Enter the Item Number in the <i>Item Number</i> field</li><li>Enter the total retention period in the <i>Retention</i> field</li><li>Enter the Final Disposition action of either “Destroy” or “Archives” in the Final column as outlined in the approved retention schedule.</li></ul>	End User
8.	Email the inventory to <a href="mailto:SA.DispositionServices@gov.ab.ca">SA.DispositionServices@gov.ab.ca</a> and follow the example below for the email subject line	End User

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	<ul style="list-style-type: none"> <li>Ministry Name – Shared Drive Inventory – Year / Month of download e.g. Service Alberta – Shared Drive Inventory – 2015-06</li> </ul>	
9.	Review the inventory for completeness, accuracy of schedule application and validate disposition eligibility.	SA Disposition Staff
10.	For the records not eligible, advise the end user that the documents must remain in their Shared Drives.	SA Disposition Staff
11.	Prepare the Records Destruction Notice and email to the Director of the Program Area.	SA Disposition Staff
12.	Review the package to ensure that the records are not responsive to ongoing/potential litigation or FOIP Requests.	Director, Program Area
13.	Identify if any conditions exist preventing final disposition from occurring (check boxes on form). If no conditions exist, check the <i>No reasons exist to hold records from the final disposition action</i> button.	Director, Program Area
14.	Sign the memo with digital signature.	Director, Program Area
15.	Email the completed package to <a href="mailto:SA.DispositionServices@gov.ab.ca">SA.DispositionServices@gov.ab.ca</a> .	Director, Program Area
16.	If conditions exist, advise end user that the records are not eligible and need to remain in their Shared Drives.	SA Disposition Staff
17.	If no conditions exist notify the end user that the documents that received approval can be deleted or held for the Provincial Archives of Alberta. Provide copy of electronic inventory.	SA Disposition Staff
18.	Delete the approved documents.	End User
19.	Empty recycle bin.	End User
20.	Notify <a href="mailto:SA.DispositionServices@gov.ab.ca">SA.DispositionServices@gov.ab.ca</a> when deletion is complete.	End User
21.	<p>Documents that have met their full retention and have a final disposition of “Archives”:</p> <ul style="list-style-type: none"> <li>Create a folder called “PAA – Preserved Records”</li> <li>Move documents to the folder</li> </ul> <p><b>Note:</b> Folder access should be “read only” for all users. 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
22.	Save the email in Master Disposition with the inventory.	SA Disposition Staff
23.	Store all documentation in SharePoint – Master Disposition.	SA Disposition Staff

# Shared Drive Document Deletion or Archive Process Map

May 2018



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