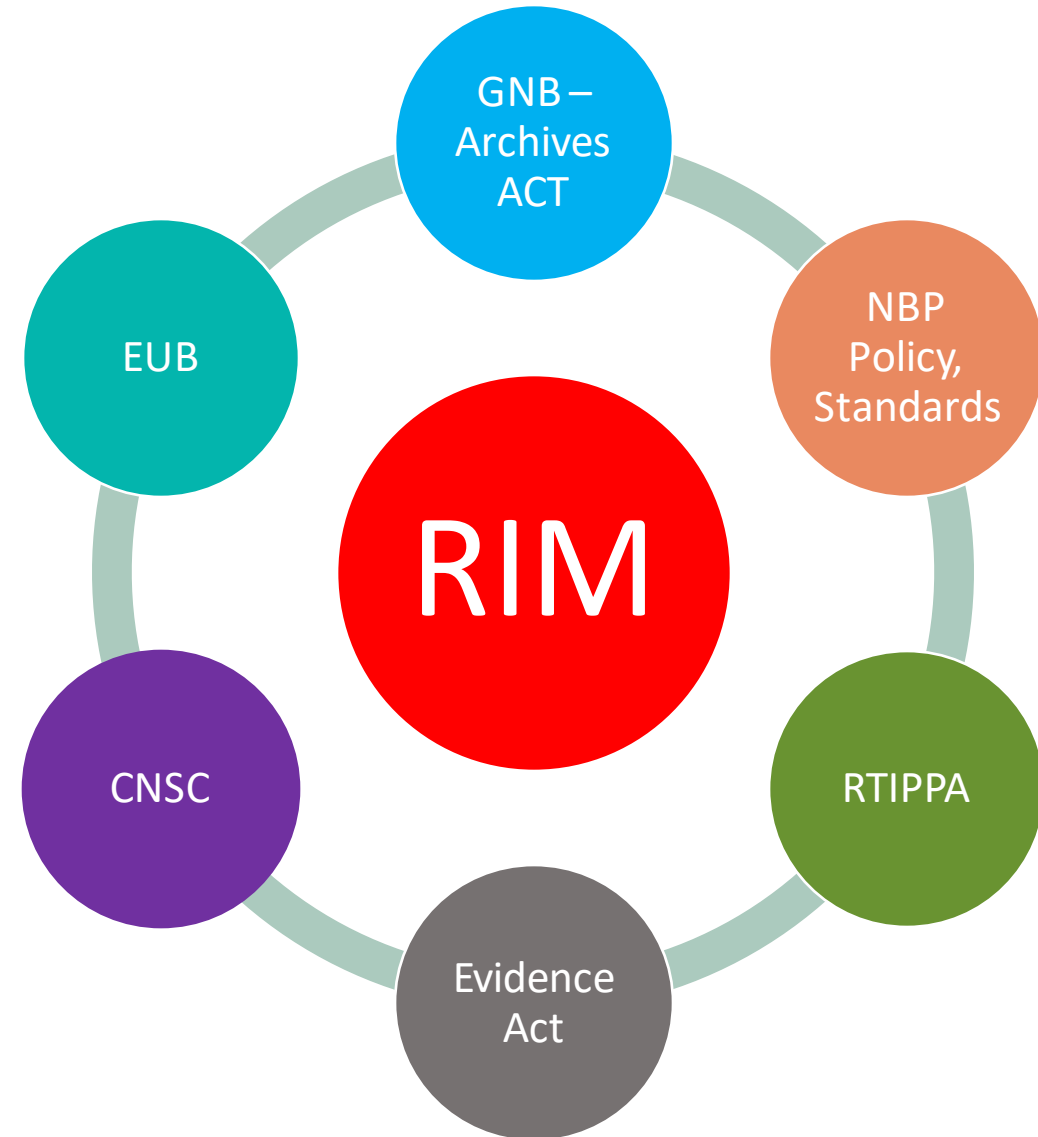


# Records & Information Management

# Records & Information Management's Role at NB Power

Key requirements of NB Power's RIM program is compliance to internal and external authorities, appropriate and reasonable security, and the legislated retention of information.





# RIM has come a long way in the last 40 years...

## Evolution of Classification & Retention and at NBP

### 1980's

- We first began with a subject classification code that consisted of multiple book codes and corresponding subject codes to classify physical records. Retention was not standardized

### 2011

- We were not addressing the huge volumes of electronic records - files that contain corporate information in electronic form that need to be captured, controlled and ultimately disposed similarly as physical or paper-based documents.

### 2019 Onwards

- The RIM program has spent the last 3 years evolving our framework, standards and policies to address the issue of managing electronic records and information.



# Records and Information Management Objectives

- To manage information in all formats
- To align with the organizational culture
- To allow an illusion of freedom for business areas to choose where records reside
- To be compliant with laws and regulations



# Meeting our RIM Objectives

- ✓ Framework has set the wheels in motion
  - NBPIM**
  - Policy and Standards, Best Practices**
  - Retention Schedules**
  - Education and Awareness**
- ✓ Governance & Executive Support will drive RIM
- ✓ All the puzzle pieces need to be in place
- ✓ Effort and commitment



# RIM Program at NB Power

**Core Records  
Management  
Services**

**Advisory Services**

**EDRMS**

**Digital Records  
Centre**

**M365 & SharePoint  
Support**

**Communication**

**Training & Education**



# Core Records Management Services

## Digitization Services

- HR Employee Records
- Purchase Orders and Invoicing
- Customer Services
  - Water Heaters
  - PPP's
- Legacy Microfilm Retrievals

## Physical File Management

- Creation, index, Retrieval and Put Away
- Corporate Vault, Records Centre (PANB), Head Office, Marysville, Plant File Areas
- Disposition/Retention

## Confidential Shredding

- Maintenance of shredding contract for physical files
- Management of destruction of computer hard drives

## Forms Control

- Registration and assignment of form numbers (Word Templates)
- Current and previous versions of NB Power Forms

# RIM Advisory Services

**RIM Governance and Strategy**

**Leading and coaching business areas**

**RIM Employee record keeping responsibilities**

**RIM Communication Site**

**Making new RIM Habits/Changing the Culture**



# Currently implementing An Electronic Records Management solution that will allow us to:

- **Manage records activities (classification, retention, legal holds, etc.) using Gimmel Records Management**
- **Manage records “In Place”**
- **Manage all formats of records (electronic and paper)**

# Digital Records Centre (DRC)

Extensive, long term initiative that transforms semi active physical records to a digital format

- Preliminary work performed by our in-house RIM Team and KTA Support team to ensure that the information in physical form was digitized according to Corporate Digitization Standards
- DRC's are managed in organized electronic records repositories (SP Online) and
- the content is available to clients at their fingertips
- The digitized record becomes the “master or official” record
- The physical records is destroyed only after the Quality Control process takes place
- This will result in significant efficiencies (office/storage space, productivity and ease of use)
- Once digitized, these records are managed by Gimmel Records Management

# M365 & SharePoint Support

**Definition of  
collaborative spaces in  
Teams and retained  
records environments in  
SharePoint Online**

**Established retention for  
Chats and Conversations  
in Teams**



**Involvement in M365  
related committees  
including the SharePoint  
2010 migration to  
SharePoint Online**


**Creation of RIM best  
practices and “how to’s”  
for Teams and SharePoint**

# RIM Communication Site






DT.Digital Technologies Hub



**DT.RecordsComm**

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[What is a Record](#) [Content Models/File Plans](#) [NBP Information Model \(NBPIM\)](#) [RIM Quick Links](#) [RIM FAQ's](#) [NB Power News Archive](#) [Edit](#)

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## Records & Information Management (RIM)

*We provide records management expertise and advice to support effective and compliant management of Corporate Information. Use this site to find information about good practice in records and information management.*



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# Training & Education

## Internal (RIM Staff)

- Classification
- Retention
- File Plan Development
- Gimmal Records Management

## Business Areas

- Understanding their record keeping responsibilities at NB Power
- CBT's to direct employees on how to manage their records



# 2022 & Beyond

...

Keeping our framework current by taking a deeper dive into moving to a fully compliant corporation

NBPIM will be an all-inclusive classification for unstructured records of the Corporation and that every business area has a records/file plan tailored to their business

Retention Review which will take place once all unstructured records are accounted for in the NBPIM

Working with all business areas helping them identify Personally Identifying Information and using NBPIM to document this

Continued training and awareness with enhanced protocol such as formally declaring record, making the electronic record immutable and unalterable

Partner with other NB Power business areas to clean up redundant, obsolete and transitory (ROT) information on shared drives and computer devices

Realignment of staff responsibilities as we move to a more digital environment



# Questions?