# Records Scheduling:
# The Recommended Approach

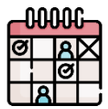
Archives of Manitoba
Government Records Office

**Step 1: Choose the right person for the job.**

Management should assign a person who understands the organization's functions and processes, and has good analytical and writing skills. If your project is very complex, you might want outside expertise in records management for assistance.

**Step 2: Plan the work as a project**

The project lead should read through pages 4-7 of GRO 1: Preparing Records Schedules. Formalize the work as a project by defining the scope and timelines for completion of the steps.



**Step 3: Gather the required information**

Consult written sources and talk to program managers about your area's functions, activities, and work processes. Management needs to be involved – see pages 5-6 in GRO 1. If the project is more complex, the Government Records Office (GRO) may ask for an org chart, a description of branch roles, annual reports, and any relevant legislation.

**Step 4: Do an analysis of functions and records**

The critical step in preparing records schedules is to understand the functions and activities of the program area. See Functional Analysis for Records for more info.

**Step 5: Define the records series**

The next step is to determine, for each function and activity, what records series are created and maintained, and other necessary information about their content, format, arrangement, and use.

**Step 6: Document key information about the series**

Begin to fill in the first page of the Records Schedule form (especially fields 2-7) and Attachment A, prioritizing the Series Context – see pages 9-10 in GRO 1. A Series Context with enough information about the records' creation and use helps us provide better direction. You can send a good working draft to the GRO for review, or continue on to step 7.

**Step 7: Determine retention periods**

A key step in the scheduling process is Determining Retention Periods. You may already have a good sense of how long your records need to be kept or you may need assistance and guidance. Feel free to leave the retention period blank on the first draft submitted if you are unsure.

What happens after step 7:

- GRO reviews, assigns a code, and provides feedback
  *Note: scheduling is an iterative process and usually takes a few rounds of drafting*
- GRO determines whether records have archival value or can be destroyed after their retention period
- GRO advises on the approval process and submits the finalized version to the Archivist of Manitoba for approval

**For related resources, see:**

Functional Analysis for Records
Records Schedules: What Managers Need to Know
GRO 1: Preparing Records Schedules
Records Schedule Form
Determining Retention Periods

November 2021; updated August 2023

Government Records Office, Archives of Manitoba
T: 204-945-3971 | E: GRO@gov.mb.ca
Visit our website to learn more about Government Recordkeeping