Integrating Records Management in the Systems Development Life Cycle

TRIGGERS
- Business need
- Pressure to computerise from internal and external stakeholders
- Desire to improve services
- Need for greater transparency and accountability

Develop business case
- identify benefits of integrating RM in system, e.g:
  - risk reduction
  - cost savings
  - improved compliance
- include RM integration in system budget
- secure management approval for RM integration

Plan system
- provide for RM integration in identified potential solutions
- include RM integration in project plan and timeframe
- include RM professional in project management structures

Conduct requirements analysis
- analyse RM requirements
- integrate RM requirements in overall system requirements
- align RM requirements with international standards for RM

Design system
- define rules and processes for, e.g., records creation, capture, security, access, retention, disposal, audit trail, disaster recovery
- define structural and contextual attributes of records
- assign responsibility for records quality and integrity
- develop change management strategy to move from existing system to new system

Implement system
- test the system for its RM performance against technical, management and functional requirements
- complete awareness and user training
- document RM requirements

Maintain system
- establish mechanisms to:
  - monitor and assess system compliance with RM requirements and standards
  - manage change in relation to new business needs, changes in regulatory environment, and upgrades and new technologies

Review and evaluate
- assess system performance regularly against RM standards and requirements
- improve performance in light of system audits and evaluation

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Training in Electronic Records Management

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