

**FEDERAL COURT OF APPEAL**

BETWEEN:

**AIR PASSENGER RIGHTS**

Applicant

-and-

**ATTORNEY GENERAL OF CANADA**

Respondent

**CANADIAN TRANSPORTATION AGENCY**

Intervener

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**AFFIDAVIT OF BARBARA CUBER  
AFFIRMED APRIL 21, 2022**

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I, Barbara Cuber, of the City of Gatineau in the Province of Québec, AFFIRM THAT:

1. I am Senior Counsel in the Legal Services Directorate of the Enabling Services Branch of the Canadian Transportation Agency ("Agency") and, as such, have personal knowledge of the matters hereinafter deposed to except where stated to be based on information and belief, in which case I believe such information to be true.
2. In an Order dated April 11, 2022 ("the April Order"), the Court ordered that the person responsible for complying with this Court's previous Order dated October 15, 2021 ("the October Order") should be required to serve and file an affidavit detailing what has been done to ensure the required disclosure was made.

3. In my capacity as counsel of record at the time, I was the individual at the Agency who was tasked with gathering documents responsive to the October Order, and with producing these to the parties.
4. I was assisted in this task by the Director of Registrar, Secretariat and Information Management; the Access to Information and Privacy Division; the Information Technology Services Division; the Office of the Chair and Chief Executive Officer; members of the Executive Committee; and the Legal Services Directorate.
5. In paragraph 47 of the April Order, the Court indicated that it expects this affidavit to address the following questions:
  - (a) how the CTA narrowed down the several thousands of pages of documents to less than two hundred pages it has disclosed;
  - (b) what steps were taken, if any, to gather and/or preserve documents upon being served with the Notice of Application on April 9, 2020;
  - (c) who at the CTA conducted the searches for documents;
  - (d) whether the CTA reviewed its encrypted emails or documents;
  - (e) what record-keeping systems the CTA has, and whether all of them were searched for responsive documents;
  - (f) whether the CTA has any backups or archives of their emails and other electronic documents, and whether those backups or archives were searched;

(g) whether the CTA conducted any investigation after learning that some documents no longer exist, and any steps taken to recover those documents; and

(h) whether the CTA's audio or video conferencing system has a recording feature and whether the conferences between March 9 and 25, 2020 were recorded.

6. In the paragraphs below, I have responded to each question set out in paragraph 47 of the April Order. However, I have re-arranged the order of the questions in order to respond to the April Order as fully and accurately as possible.

7. Nothing in this affidavit should be interpreted as waiving solicitor-client privilege or litigation privilege.

**What steps were taken, if any, to gather and/or preserve documents upon being served with the Notice of Application on April 9, 2020 (question (b) in paragraph 47 of the April Order)**

8. On April 14, 2020, Allan Matte, counsel of record at the time, sent a notification to relevant Agency personnel, including members. He informed them of the Notice of Application and the request for material pursuant to Rule 317 of the *Federal Courts Rules*, SOR 98-106. He notified personnel of the need to identify and preserve documents responsive to this request.

**What record-keeping systems the CTA has, and whether all of them were searched for responsive documents (question (e) in paragraph 47 of the April Order)**

9. The Agency uses an electronic corporate repository called RDIMS.

10. The Agency is required to preserve all documents of business value and to delete all transitory records, as set out in the following document: "What to Keep! What Not to Keep!"

at Exhibit A.

11. All paper documents that constitute records of business value are required to be saved in RDIMS, as outlined in the following document: "Conseils de nettoyage de documents papiers/Paper Documents Clean Up Tips" at Exhibit B.
12. All Microsoft Outlook items that are of business value are required to be saved in RDIMS. Agency personnel are required to delete transitory records from their Outlook account, as outlined in the following documents: MS Outlook 2016 Email Clean Up Tips at Exhibit C; and Tips on Managing Your Emails at Exhibit D.
13. RDIMS was searched for responsive documents.
14. In addition to RDIMS, the Outlook accounts of Agency staff and members were searched for responsive documents.

**Who at the CTA conducted the searches for documents (question (c) in paragraph 47 of the April Order)**

15. Staff in the Information Technology Division, Information Management Division, Access to Information and Privacy Directorate, and Office of the Chair and Chief Executive Officer conducted searches for documents.

**Steps taken to comply with disclosure required in the October Order**

16. To ensure that disclosure required by the October Order was made, I reviewed each document that had previously been gathered and preserved in connection with two Access to Information requests and one Parliamentary Standing Committee request, each of which

related to the subject matter of the Statement on Vouchers.

17. The first Access to Information request, A-2020-00002, was received by the Agency on or around May 5, 2020. It sought unpublished notes and exchanges that led to the Statement on Vouchers and subsequent FAQ answers on vouchers and refunds.

18. The text of the request reads as follows:

Simply mean records not on CTA website or published initial request: Provide the unpublished background meetings, notes and exchanges that lead to CTA March 13/2020 ruling to temporarily suspend certain provisions in the air passenger bill of rights such as on cancellations/disruptions and to its subsequent March 25/20 statement on vouchers and the its subsequent FAQ answers on vouchers and refunds. Only include unpublished notes and exchanges at CTA. TIMEFRAME June 1, 2019 to March 25, 2020.<sup>1</sup>

19. On October 26, 2021, I contacted Myriame Côté, Access to Information and Privacy Coordinator at the Agency, to obtain access to search records. Ms. Côté is the person at the Agency responsible for responding to Access to Information requests. I was provided with access to the search results from this request on November 1, 2021.

20. The search results consisted of 683 items. I reviewed each one of these items to identify documents responsive to the October Order.

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<sup>1</sup> Motion Record of Air Passenger Rights, Motion pursuant to Rules 41 and 318 of the Federal Courts Rules, Affidavit of Gábor Lukács dated January 3, 2021, Exhibit AH at 225 and 229.

21. The second Access to Information request, A-2020-00029, was received by the Agency on or around August 25, 2020. The request was made by Gábor Lukács, President and Director of Air Passenger Rights.

22. That Request sought all documents relating to the drafting, review, approval and/or publication of the Statement on Vouchers between March 11 and April 9, 2020.

23. The text of the request reads as follows:

All documents, including e-mails, notes, meeting minutes, internal correspondences, and any other written record, relating to the drafting, review, approval, and/or publication of the Statement on Vouchers (<https://otc-cta.gc.ca/eng/statement-vouchers>). The time period we request is March 11, 2020 to April 9, 2020.<sup>2</sup>

24. On October 18 and 26, 2021, I contacted Myriame Côté to request access to the complete, unredacted search results associated with this request.

25. On October 29, November 1 and December 3, 2021, I was provided with access to these search results. These results consisted of 1417 Outlook items, 25 electronic documents, and a 5099-page working copy of the search results.

26. I reviewed each document contained in this collection of search results to identify documents responsive to the October Order.

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<sup>2</sup> Motion Record of Air Passenger Rights, Motion pursuant to Rules 41 and 318 of the Federal Courts Rules, Affidavit of Gábor Lukács dated January 3, 2021, Exhibit AE at 206.

27. On or around October 22, 2021, I spoke with Patrice Bellerose about documents required to be produced pursuant to the October Order. Ms. Bellerose is the Director of Secretariat, Registrar and Information Management at the Agency. Both the Information Management Division and Access to Information and Privacy Directorate fell under her authority.
28. Following our discussion, I consulted a collection of documents that were preserved in RDIMS in early April 2021. This collection of documents consisted of communications between Transport Canada, including the Minister of Transport's Office, and the Agency regarding cancelled plane tickets.
29. This collection stemmed from a motion from the Standing Committee on Transportation, Infrastructure and Communities from March 25, 2021.
30. According to the Minutes of Proceedings from March 25, 2021, the Motion read as follows:
- That, pursuant to Standing Order 108(1)(a), an Order of the Committee do issue for correspondence between Transport Canada, including the Minister of Transport's office, and the Canadian Transportation Agency regarding cancelled plane tickets and that these documents be provided to the Committee Clerk within 30 days following the adoption of this motion.<sup>3</sup>
31. I reviewed each document in this collection on or around November 29, 2021 to identify documents responsive to the October Order.

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<sup>3</sup> See Air Passenger Rights Informal Motion in connection with its motion under Rules 41 and 318 of the Federal Courts Rules, dated May 12, 2021 and accompanying affidavit of Gábor Lukács affirmed on May 12, 2021.

32. All responsive documents I found in the search results from these previous document searches were produced to the parties in compliance with the October Order.
33. In addition to reviewing documents from these three searches, on October 26, 2021, I contacted Lesley Robertson, Executive Coordinator of the Office of the Chair and CEO of the Agency. Ms. Robertson worked directly with the Chair, Scott Streiner, in March 2020.
34. From our exchange, Ms. Robertson provided five documents.
35. I reviewed each of these documents and determined that one of the documents was responsive to the October Order.
36. This document consisted of a letter to Scott Streiner from Jean-Marc Eustache from Air Transat dated March 22, 2020. This document was produced to the parties on December 14, 2021.
37. On October 22 and 26 and November 19 and 22, 2021, I communicated with Jonathan Guindon, who is Manager of Information Technology Operations in the Information Technology Services Division of the Agency. Mr. Guindon is the person responsible for searches conducted in the Outlook accounts of Agency staff and members.
38. Based on our exchanges, staff in the Information Technology Services Division conducted an electronic search in all Agency staff and member Outlook accounts in order to search for documents responsive to the October Order.
39. I was given access to the search results, consisting of 799 items, on November 26, 2021.



40. I reviewed each document contained in the results from this search to identify documents responsive to the October Order.
41. I provided all responsive documents that I found from this search to the parties on December 14, 2021.
42. After the Agency disclosed responsive documents on December 14, 2021, Air Passenger Rights wrote several letters alleging deficiencies in the disclosure package. In response to these letters, I repeatedly verified the existing search results to ensure that I had not overlooked any items.
43. I verified my findings with Patrice Bellerose as she was familiar with the Access to Information requests outlined above.
44. I also spoke with the Agency's Chief of Staff, Sébastien Bergeron; Senior General Counsel Valérie Lagacé; Lesley Robertson; and various members of the Executive Committee during this time to confirm my findings.
45. On December 22, 2021, after receiving a letter from counsel for Air Passenger Rights concerning a missing covering e-mail that would have accompanied Jean-Marc Eustache from Air Transat's March 22, 2020 letter to the Agency, I contacted Ms. Robertson to ask if she had that covering email. As set out in paragraph 36, on October 26, 2021, she had provided me with Mr. Eustache's letter to Mr. Streiner.
46. She checked her records again and concluded that she did have the covering email. She sent it to me immediately. I provided the covering email to the parties on December 24, 2021

and explained that its omission was an oversight.

**How the CTA narrowed down the several thousands of pages of documents to less than two hundred pages it has disclosed (question (a) in paragraph 47 of the April Order)**

47. I understand this question to be a reference to the thousands of pages of documents that were generated from Access to Information Request A-2020-00029, and/or to the Agency's reference to the thousands of pages it reviewed in complying with the October Order.

48. In reviewing these search results, thousands of documents that fell outside of the timeframe of the Order were excluded; internal documents not shared with Members were excluded pursuant to paragraph 27 of the October Order; duplicates were excluded; and documents unrelated to the Statement on Vouchers were excluded.

49. For ease of reference, paragraph 27 of the October Order read as follows:

However, the applicant has provided no evidence to substantiate disclosure of documents post-dating the date the impugned statement was posted. Similarly, the applicant has failed to establish that documents that were purely internal to the CTA and which were not shared with its members are relevant. In short, there is no basis to suggest that such documents would contain information about whether CTA members or third parties were involved in making the decision to post the impugned statement, which is the essence of the applicant's bias allegations. Thus, these additional documents need not be disclosed.<sup>4</sup>

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<sup>4</sup> *Air Passenger Rights v Canada (Attorney General)*, [2021 FCA 201](#) at para [27](#).

**Whether the CTA reviewed its encrypted emails or documents (question (d) in paragraph 47 of the April Order)**

50. All emails and documents which were identified during the search were reviewed. No encrypted emails or documents were identified during the search.

**Whether the CTA has any backups or archives of their emails and other electronic documents, and whether those backups or archives were searched (question (f) in paragraph 47 of the April Order)**

51. As a corporate repository, all documents of business value are archived in RDIMS. RDIMS was searched for responsive documents.

52. All documents that are transitory are required to be deleted.

53. All documents in Outlook are kept on backup tapes for a period of 10 days. These tapes are then moved offsite and kept for 12 weeks.

54. The Agency did not search these tapes.

**Whether the CTA conducted any investigation after learning that some documents no longer exist, and any steps taken to recover those documents (question (g) in paragraph 47 of the April Order)**

55. The Agency did not conduct any investigation after learning that some documents no longer exist.

56. The Agency searched its records in RDIMS and in Outlook for responsive documents.

**Whether the CTA’s audio or video conferencing system has a recording feature and whether the conferences between March 9 and 25, 2020 were recorded (question (h) in paragraph 47 of the April Order)**

57. The Agency's audio and video conferencing systems have a recording feature.

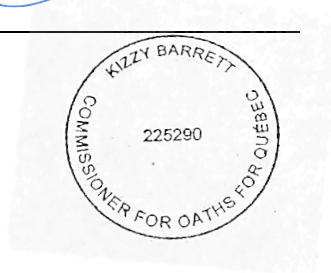
58. No. These meetings were not recorded.

59. This affidavit is made at the request of this Court following the April 11, 2022 Order and for no other or improper purpose.

DATED at the City of Gatineau, in the Province of Quebec, this 21<sup>st</sup> day of April, 2022.

AFFIRMED BEFORE ME  
at the City of Gatineau,  
in the Province of Quebec,  
this 21<sup>st</sup> day of April, 2022.

Commissioner of Oaths



**BARBARA CUBER**

Exhibit A of the affidavit of Barbara Cuber  
affirmed before me on April 21, 2022

A handwritten signature in blue ink, appearing to be 'K. BF', written in a cursive style.

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Signature



# WHAT TO KEEP!

# WHAT NOT TO KEEP!

It is the responsibility of every individual working for the Agency to preserve corporate records, and dispose of transitory records, in support of the Agency's information management goals.

## WHAT TO KEEP!

### Corporate Records:

any type of information collected or created by the Agency in order to control, support, or document the delivery of programs, carry out operations, to make decisions, or to account for the activities of the Agency. Examples include records which:

- document the delivery of programs or services;
- record decisions and actions;
- provide evidence of financial and legal transactions;
- have policy, program and procedural implications;
- give or request direction or comments on Agency activity; and
- are substantive drafts that demonstrate a document's evolution, the decision making process, or the development of policy and legislation.

## WHAT NOT TO KEEP!

### Transitory Records:

are only required for a limited time to complete a routine action or to prepare a subsequent record. An employee must dispose of or delete transitory records, including e-mail messages and attachments, once they have served their purpose. The sheer volume of transitory records can impede the ability to manage official records. Examples include:

- records with no business, legal, financial or administrative value;
- records needed only for a limited time to complete a routine action or prepare a subsequent record;
- draft documents, where all substantive content/changes have been incorporated into a subsequent document;
- duplicate copies used for convenience only;
- casual communications, FYI e-mail and information received as part of a distribution list;
- e-mail that are captured in a more recent message; and
- personal information.

**IMPORTANT:** You cannot dispose of or delete transitory records that are required for an active ATIP request.





# DOCUMENT À CONSERVER! ET À NE PAS CONSERVER!

Il incombe à chaque employé(e) de l'Office de conserver les documents officiels et de disposer des documents éphémères, conformément aux objectifs de l'Office en matière de gestion de l'information.

## DOCUMENTS À CONSERVER!

### Documents officiels :

Toute information produite ou conservée sert à contrôler, à appuyer ou documenter l'exécution des programmes, le déroulement des activités, la prise de décisions, ou encore pour rendre compte des activités de l'Office. Citons à titre d'exemples de documents organisationnels, ceux qui :

- documentent l'exécution des programmes ou la prestation des services;
- documentent la prise de décisions et de mesures;
- témoignent de transactions financières et d'actes juridiques;
- ont des incidences sur les politiques, les programmes et les procédures;
- constituent des demandes de directives ou présentent des commentaires relativement aux activités de l'Office;
- constituent des ébauches de fond faisant état de leur évolution, du processus décisionnel ou de l'élaboration d'une politique ou d'une loi.

## DOCUMENTS À NE PAS CONSERVER!

### Documents éphémères:

Les documents éphémères sont des documents dont on a besoin seulement pour une période limitée, afin d'achever un travail en cours ou de rédiger d'autres documents. Ils **doivent être supprimé ou éliminé**, notamment les messages électroniques, **dès qu'ils ne sont plus utiles**. Le nombre de documents éphémères à lui seul peut nuire à la capacité de gérer les documents organisationnels de l'Office. Citons à titre d'exemples :

- les documents sans valeur organisationnelle, juridique, financière ou administrative;
- les documents nécessaires pendant un certain temps en vue d'achever un travail courant ou de préparer un document ultérieur;
- les ébauches si les principaux éléments ou les changements ont été incorporés dans un document ultérieur;
- les copies utilisées à des fins de commodité seulement;
- les communications informelles transmises uniquement à des fins d'information.
- les messages électroniques qui sont repris dans un messages plus récent;
- l'information personnelle.

**IMPORTANT :** Vous ne pouvez pas éliminer ou supprimer des documents éphémères requis dans le cadre d'une demande active d'AIPRP

Exhibit **B** of the affidavit of Barbara Cuber  
affirmed before me on April 21, 2022

A handwritten signature in blue ink, appearing to be 'K. BF', written in a cursive style.

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Signature



# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

Click [HERE](#) to jump to English version

### Mythe à déboulonner!

Mythe : J'ai tellement de papiers que ça ne vaut pas la peine d'essayer de faire le ménage!

Vérité : Certaines études suggèrent que nous perdons de une à deux heures par journée de travail à chercher de l'information. Un ménage dans vos dossiers papiers facilitera la conservation, le repérage et la communication de l'information à l'avenir.

## 1. Faites le ménage dans vos papiers en trois étapes :

1. Apprenez à **CONNAÎTRE** la valeur de votre information
2. **CLASSEZ** votre information
3. **PASSEZ À L'ACTION** en conservant ou en éliminant l'information

### Apprenez à **CONNAÎTRE** la valeur de votre information

Quel que soit le type d'information que vous avez ou l'endroit où elle se trouve, sa valeur détermine ce que vous devez en faire.

#### INFORMATION À VALEUR OPÉRATIONNELLE

Les ressources documentaires à valeur opérationnelle (RDVO) sont des documents de l'organisation qui, quelle qu'en soit la forme,

- **appuient la prestation des programmes et des services** (p. ex., politiques, lignes directrices, dossiers des clients, documents de planification)
- **rendent compte des activités opérationnelles** (p. ex., attribution des tâches, documents relatifs aux projets et aux processus, offres d'emploi, contrats, transactions)
- **font état des données et des raisons justifiant les décisions ou les mesures prises** (p. ex., comptes rendus de décision, autorisations, notes d'information, avis juridiques, documents relatifs aux réunions)
- appuient l'élaboration des rapports ministériels, des rapports sur le rendement et la reddition de comptes ministérielle (p. ex., plans stratégiques, rapports de l'organisation, statistiques)
- Vous devez conserver ce type d'information.

# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

### INFORMATION ÉPHÉMÈRE

L'information éphémère comprend l'information qui :

- **appuie la création d'information à valeur opérationnelle, mais n'est nécessaire que pour une durée limitée** (p. ex., copies de présentations ou de documents faites pour des besoins pratiques, courriels envoyés pour information, bulletins d'information, documents de formation, et documents de travail dont les modifications importantes ont été enregistrées dans une version ultérieure)
- **n'appuie pas la création de l'information à valeur opérationnelle** (p. ex., pourriels, invitations à des réunions, avis concernant les congés et les vacances, renseignements personnels)

**Vous devez détruire\* cette information quand vous n'en avez plus besoin.**

\*Exception : Si l'information éphémère est visée par une demande d'accès à l'information en cours, une affaire judiciaire (investigation électronique), ou une vérification, l'information doit être conservée. En cas de doute, communiquez avec la Gestion de l'information.

## 2. CLASSEZ votre information

Le saviez-vous? Par papier, on entend les documents imprimés, les cahiers de notes, les papillons adhésifs (Post-it), les dossiers et les télécopies.

À conserver	À jeter	Ne sait pas
Information à valeur opérationnelle	Information éphémère	Information que vous ne savez pas où classer*

\*Lorsque vous vous demandez s'il s'agit d'une RDVO ou d'information éphémère, ou si vous devez numériser votre document, communiquez avec votre gestionnaire.

Qu'en est-il des ouvrages de référence? Toutes les publications doivent être envoyées à l'équipe de Gestion de l'information, conformément à la loi. Les publications sont souvent visées par des initiatives à l'échelle gouvernementale comme des programmes de recyclage internationaux.

# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

### 3. PASSEZ À L'ACTION en conservant ou en éliminant l'information

#### Mythe à déboulonner!

Mythe : Je peux numériser et détruire toutes mes informations papier.

Vérité : Les RDVO peuvent être numérisées, mais cela implique beaucoup plus qu'une simple copie digitale ou électronique. Les imprimantes-scanners du réseau de l'Office ont été configurées pour respecter les lignes directrices du gouvernement fédéral afin de s'assurer que les normes sont respectées en ce qui a trait à la qualité et à l'admissibilité des documents numériques. Suivez les instructions pour numériser vos documents et les enregistrer dans le SGDDI. Si numérisé, SVP informer la GI.

Faites le ménage dans vos papiers en fonction de la valeur et du niveau de confidentialité de l'information.

Information Ephémère	Action
Non classifié ou protégé A	<ul style="list-style-type: none"><li>• Mettre en boîtes et identifiez la boîte: <b>Éphémère</b></li><li>• Apportez à la GI <b>en personne</b></li></ul>
Protégé B ou Classifié	<ul style="list-style-type: none"><li>• Mettre en boîtes et identifiez la boîte: <b>Éphémère sécurisé</b></li><li>• Apportez à la GI <b>en personne</b></li></ul>

Ressources documentaires à valeur opérationnelle (RDVO)	Action
Dossiers avec ou sans code-barres	<ul style="list-style-type: none"><li>• Rassembler les dossiers officiels ensemble (avec code-barres)</li><li>• Rassembler les dossiers non officiels (sans code-barres) ensemble et, si possible, ajoutez une note sur le dessus identifiant le numéro de dossier / sujet.</li><li>• Mettre en boîte <u>tous les dossiers</u> et identifiez la boîte: <b>RDVO</b></li><li>• Apportez à la GI <b>en personne</b></li></ul>

# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

RDVO éparpillées	<ul style="list-style-type: none"><li>• Rassembler les RDVO qui se rapporte à un même dossier (officiel ou non) et identifier le dossier auquel il doivent appartenir soit par le titre soit par le numéro de dossier.</li><li>• Mettre en boîte <u>tous les RDVO éparpillées</u> et identifiez la boîte: <b>RDVO</b></li><li>• Apportez à la GI <b>en personne</b></li></ul>
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# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

### Myth buster!

Myth: I have so much paper it's pointless to try and clean it up!

Truth: Some studies suggest we lose 1–2 hours each work day hunting for information. Cleaning up your paper files will make it easier to store, find and share information going forward.

### 1. Three steps to clean up your paper:

4. KNOW the value of your information
5. SORT your information
6. ACT to keep or destroy information

### KNOW the value of your information

No matter what kind of information you have or where it is stored, its value determines how you should clean it up.

#### INFORMATION OF BUSINESS VALUE

Information resources of business value (IRBVs) are corporate records in any form that:

- **support the delivery of programs and services** (e.g. policies, guidelines, client records, planning documents)
- **capture business activities** (e.g. task assignments, project and process documentation, employment offers, contracts, transactions)
- **record the evidence and rationale for decisions or actions** (e.g. records of decision, authorizations, briefing notes, legal advice, meeting documents)
- support departmental reporting, performance and accountability (e.g. strategic plans, corporate reports, statistics)

**This kind of information you must keep.**

# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

### TRANSITORY INFORMATION

Transitory information includes information that:

- **supports the creation of information of business value but is only needed only for a limited time** (e.g. convenience copies of presentations or documents, FYI emails, newsletters, training material, and working drafts where major changes were documented in a later version)
- **does not support the creation of information of business value** (e.g. junk mail, meeting notices, holiday and vacation notices, personal information)

**This information you must destroy\* when it is no longer needed.**

\*Exception: If the transitory information is the subject of an open ATIP, legal case (e-Discovery), or audit, you must keep it. When in doubt, contact Information Management.

## 2. SORT your information

Did you know? Paper includes printed documents, notebooks, Post-it notes, files and faxes.

Keepers	Trash	Unknown
Information of Business Value	Transitory Information	Information you're not sure of*

\*If you're aren't sure whether your information is an IRBV or transitory, or whether to digitize your paper, contact your manager.

What about reference books? All public publication must be sent to the Information Management team as per legislation. Publications are often part of government-wide initiatives such as international recycling programs.

# Conseils de nettoyage de documents papiers

## Paper Documents Clean-up Tips

### 3. ACT to keep or destroy information

#### Myth buster!

Myth: I can scan and destroy all my paper records.

Truth: IRBVs can be digitized, but this involves much more than simply scanning. The Agency network printers/scanners have been configured to meet federal government guidelines to ensure standards are met for the quality and admissibility of digital records. Follow these instructions to digitize and save to RDIMS. If digitized, please inform IM.

Clean up your paper information based on its value.

Transitory Information	Action
Unclassified or Protected A	<ul style="list-style-type: none"><li>Put in boxes and mark as: <b>Transitory</b></li><li>Bring to IM <b>in person</b></li></ul>
Protected B or above	<ul style="list-style-type: none"><li>Put in boxes and mark as: <b>Secured Transitory</b></li><li>Bring to IM <b>in person</b></li></ul>

Information of Business Value (IRBV)	Action
Files folders with or without bar codes	<ul style="list-style-type: none"><li>Keep official files (with bar codes) together</li><li>Keep un-official files together (without bar codes) and if possible, add note on top identifying file # / subject.</li><li>Box all files and mark as: <b>IRBV Files</b></li><li>Bring to IM <b>in person</b></li></ul>
Loose IRBV	<ul style="list-style-type: none"><li>Keep all IRBV that relate to a file or subject (official file or not) together and identify the file to which it belongs using either the file number or file subject.</li><li>Box all records and mark as: <b>IRBV</b></li><li>Bring to IM <b>in person</b></li></ul>

Exhibit C of the affidavit of Barbara Cuber  
affirmed before me on April 21, 2022

A handwritten signature in blue ink, appearing to be 'K. BF', is written above a horizontal line.

Signature



# Conseils pour le nettoyage des comptes de courriel dans MS Outlook 2016

## MS Outlook 2016 Email Clean-up Tips

[English text starts on page 5](#)

### Contenu / Contents

1.	Qu'est-ce qui est inclus dans votre boîte aux lettres? .....	1
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## 1. Qu'est-ce qui est inclus dans votre boîte aux lettres?

Il est important de prendre conscience que la taille d'une boîte aux lettres dépend de l'ensemble de ses éléments, à savoir :

- La boîte de réception
- Le dossier des éléments envoyés
- Tous les dossiers (qu'ils soient générés par le système ou créés par l'utilisateur)

- Tous les éléments du calendrier
- Etc.

## 2. Comprendre ce que représente la taille d'un dossier

Les octets sont des données, et un **fichier** est composé d'octets.

1 kilo-octet (Ko) = 1000 octets

1 mégaoctet (Mo) = 1000 Ko

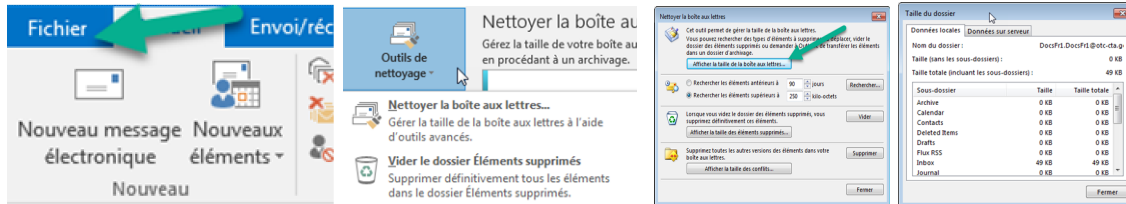
1 gigaoctet (Go) = 1000 Mo

1 téraoctet (To) = 1000 Go

### 3. Prioriser le nettoyage selon la taille des dossiers

Un coup d'œil à la taille de dossiers vous permettra de décider lesquels devraient être nettoyés en premier :

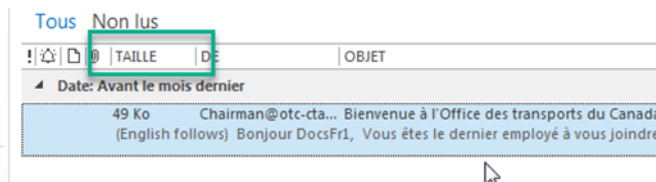
- Cliquez sur l'onglet « Fichier ».
- Sous « Outils de nettoyage », cliquez sur « Nettoyer la boîte aux lettres... ».
  - Cliquez sur « Afficher la taille de la boîte aux lettres... ».



### 4. Filtrer les courriels par taille

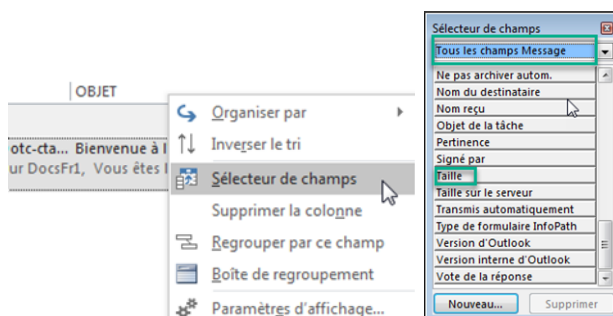
Une fois que vous avez choisi les dossiers à nettoyer en premier, vous pouvez filtrer les courriels par taille afin de supprimer ceux qui ont des pièces jointes volumineuses :

- Repérez le dossier.
- Cliquez sur la colonne « Taille ».



Si la colonne « Taille » n'apparaît pas, voici la marche à suivre pour l'ajouter :

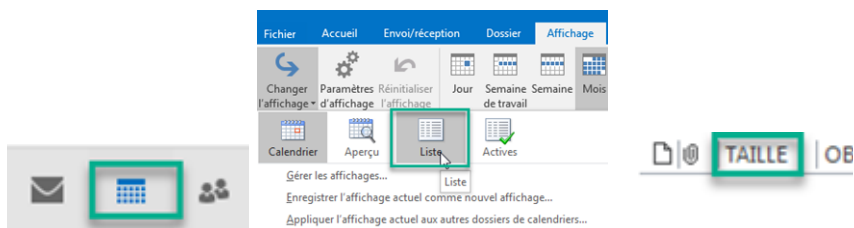
- Cliquez à droite sur n'importe quelle colonne, puis choisissez « Sélecteur de champs ».
- Glissez le champ « Taille », à partir de la liste des « Champs souvent utilisés » ou de « Tous les champs Message », vers la zone des colonnes.



## 5. Nettoyage du calendrier

Pour nettoyer votre calendrier en fonction de la taille de ses éléments, procédez comme suit :

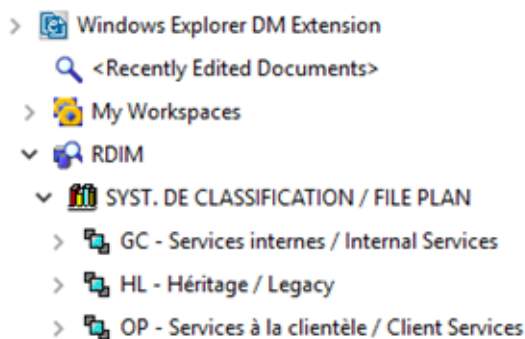
- Cliquez sur l'icône « Calendrier ».
- Sous l'onglet « Affichage », cliquez sur « Changer l'affichage » et sélectionnez « Liste ».
- Cliquez sur la colonne « Taille ». Si la colonne « Taille » n'apparaît pas, [suivre la démarche décrite à l'étape numéro 4](#).
- Examinez les éléments pour supprimer ceux dont vous n'avez plus besoin.



## 6. Déplacer les ressources documentaires à valeur opérationnelle (RDVO) dans le SGDDI

Après avoir supprimé les courriels et les éléments du calendrier en fonction de leur taille, il vous faut maintenant déplacer les RDVO dans le SGDDI et supprimer les courriels éphémères (utiles pour une durée limitée).

La première étape recommandée consiste à localiser dans le système de classement de l'Office le numéro de dossier correspondant à chaque dossier Outlook. Vous pourrez ainsi enregistrer en bloc une série de courriels dans le SGDDI. Dans Windows Explorer, le système de classement de l'Office se trouve sous le SGDDI (Windows Explorer DM Extension)



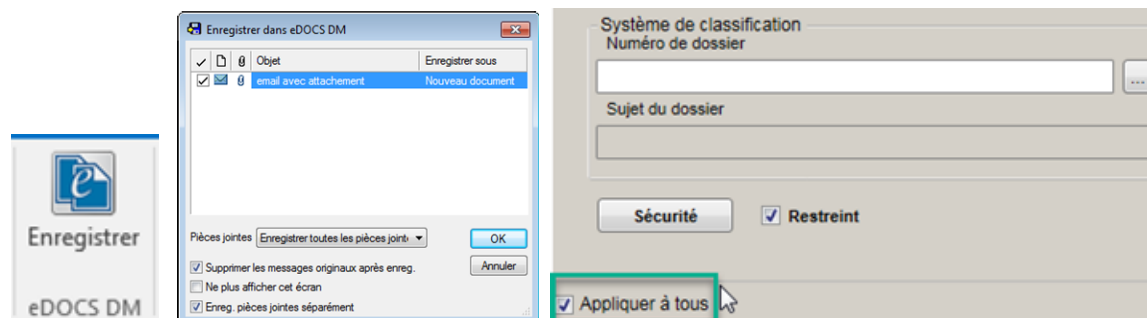
Ouvrir les différentes fonctions du système de classement jusqu'à ce que vous trouviez le numéro de dossier correspondant à chaque dossier Outlook. Si le dossier voulu ne se trouve pas dans le système de classement de l'Office, vous pouvez demander à votre gestionnaire si quelqu'un de votre groupe dispose des droits d'accès nécessaires pour y ajouter de nouveaux dossiers. Si ce n'est pas le cas, n'hésitez pas à envoyer une demande à [Services-GI-IM@otc-cta.gc.ca](mailto:Services-GI-IM@otc-cta.gc.ca). Veuillez fournir le plus de détails possible; précisez, par exemple, où le dossier devrait se trouver dans le système de classement de l'Office.

Une fois que vous avez trouvé, le numéro de dossier particulier correspondant à un dossier Outlook, vous pouvez déplacer en bloc des courriels vers le SGDDI. Il est recommandé de déplacer environ 30 courriels à la fois. Au-delà de ce nombre, le système risque de figer.

Une fois les courriels sélectionnés, cliquez sur l'icône « Enregistrer eDOCS DM ». Assurez-vous ensuite que les options suivantes sont sélectionnées dans l'écran « Enregistrer dans eDOCS DM » :

- Pièces jointes : Enregistrer toutes les pièces jointes
- Supprimer les messages originaux après enreg.
- Enreg. pièces jointes séparément

Après avoir cliqué sur OK, il reste à remplir le profil. Assurez-vous de cocher la case « Appliquer à tous ».



Même si vous avez l'impression que le système est figé, donner lui le temps nécessaires pour compléter les sauvegardes. C'est le temps d'un café? :)

# MS Outlook 2016 Email Clean-up Tips

## 1. What is included in your mailbox?

It's important to realize that the mailbox size includes everything related to the mailbox, which contains:

- In-box
- Sent folder
- All folders (system and user created)
- All calendar items
- Etc.

## 2. Understanding file size

Bytes are pieces of information and a **file** is made up of bytes.

1 kilobyte (KB) = 1000 bytes

1 megabyte (MB) = 1000 KB

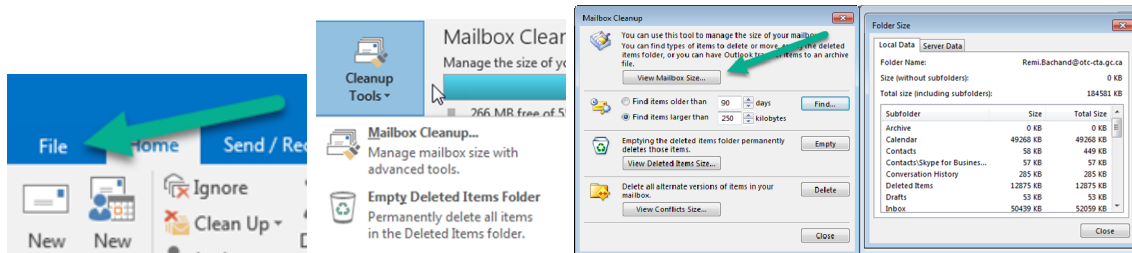
1 gigabyte (GB) = 1000 MB

1 terabyte (TB) = 1000 GB

## 3. Prioritize clean-up based on size

Looking at the folder size of folders will allow you to decide which folders to cleanup first.

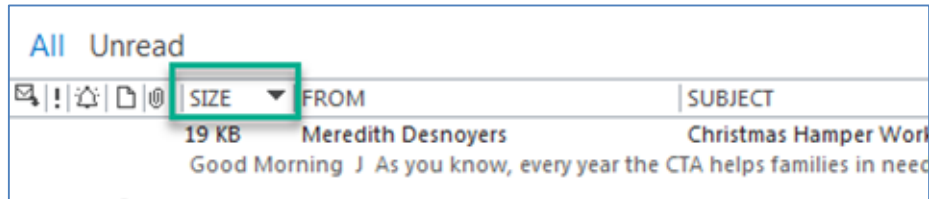
- Click on the File tab.
- Under Cleanup Tools, click on Mailbox Cleanup...
  - Click on View Mailbox Size...



## 4.Filter by size

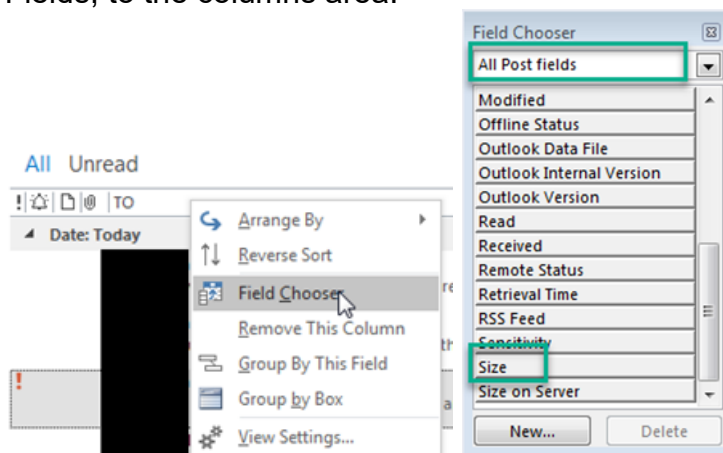
Once you have decided on the folder(s) to clean-up first, you can filter by size and delete emails that have large attachments:

- Locate the folder.
- Click on the Size column.



If the size column is not present, you can add it by:

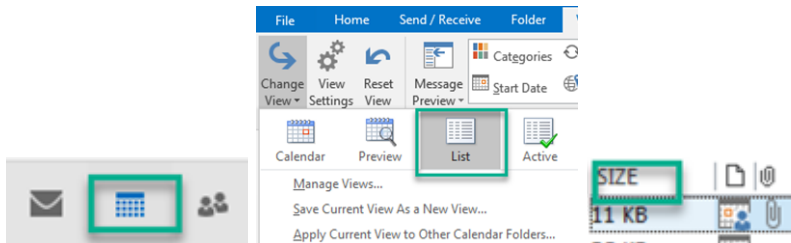
- Right clicking on any column and selecting Field Chooser.
- Dragging the Size field, from either the Frequently used Fields or the All Post Fields, to the columns area.



## 5. Calendar clean-up

To clean-up your calendar based on size, follow the following steps.

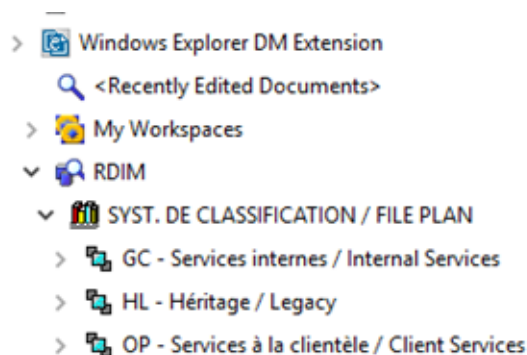
- Click on the Calendar icon.
- Under the View tab, click on Change View and select List.
- Click on the size column. If the size column is not present, you can add it by following the steps described in step number 4.
- Review and delete items you no longer need.



## 6. Move information resources of business value (IRBV) to RDIMS

Once you have deleted emails and calendars items based on size, you now need to move IRBVs to RDIMS and delete transitory (required for a limited time) emails.

The recommend first step is to identify each file (file #) from the Agency File Plan (AFP) that relates to each Outlook folder. This will allow you to mass save emails to RDIMS. In Windows Explorer the AFP is located under the RDIMS (Windows Explorer DM Extension)



Expand the various functions of the AFP until you locate a specific file # for each Outlook folder. If a file does not exist in the AFP, you can ask your manager if someone within your group has access to add new files in the AFP. If your group does not have such a person, you can send a request to [Services-GI-IM@otc-cta.gc.ca](mailto:Services-GI-IM@otc-cta.gc.ca). Please provide as much details as possible such as where in the AFP the file should be located.

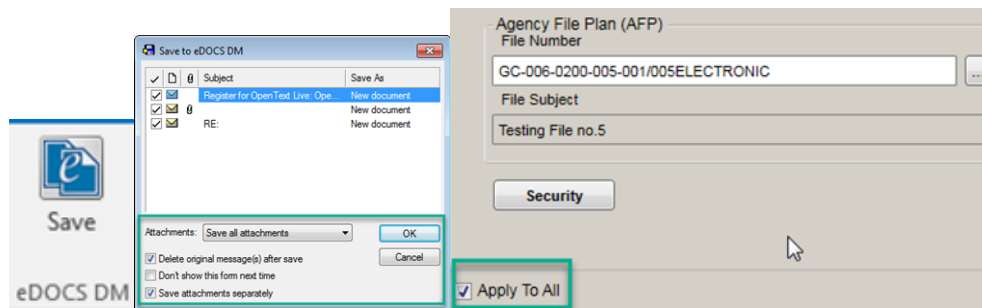


Once you have identified a specific AFP file # for a specific Outlook folder, you can mass move emails to RDIMS. It is recommend to move about 30 emails at a time. Anything more will cause performance issues (freeze).

Once emails have been selected, click on the Save to eDOCS DM icon. The Save to eDOCS DM screen should have the following selected:

- Attachments: Save all attachments
- Delete original messages(s) after save
- Save attachments separately

After clicking OK, the profile needs to be completed. Make sure to select the Apply To All checkbox.



Even if it appears frozen, give it time to complete the saves. Time for a coffee? :)

Exhibit **D** of the affidavit of Barbara Cuber  
affirmed before me on April 21, 2022

A handwritten signature in blue ink, appearing to be 'K. B. C.', is written above a horizontal line.

---

Signature

# Reminder

## Importance of managing your emails

Properly managing your emails ensures you meet your information management responsibilities and that you adhere to Government of Canada policies such as the [Standard on Email management](#).

It's important to realize that the mailbox includes:

- Inbox folder
- Sent Items folder
- All folders (system and user created)
- All calendar items

The quickest way to free up space in your mailbox is to sort your emails by size, and save information of corporate value to RDIMS and delete any transitory or duplicate information.

You will find the following tools on the Hub [Information Management](#) page to assist you: [Managing your Emails Against the Clock](#) (RDIMS# 2124835), [MS Outlook 2016 Email Clean-up Tips](#) (RDIMS# 1630226), [What to Keep! What NOT to Keep!](#) (RDIMS# 1313103) .

Best practices:

- Take 5-10 minutes to review all emails you have sent and received in a day, either at the beginning or end of your day, delete the transitory and/or emails strings. Then save information of corporate value to RDIMS.
- Avoid duplication. Email sender is responsible for saving information of corporate value to RDIMS. Save the last email string that captures the complete story and delete any previous strings, as they are transitory, using the conversation cleanup feature in Outlook. Redundant messages throughout a Conversation (email thread) are moved to the Deleted Items folder. This feature is most useful on Conversations with many responses back and forth, and many recipients. On the Home tab, in the Delete group, click Clean Up. Click Clean Up Conversation. The current Conversation of the email you selected is reviewed, and redundant messages are deleted.
- Send RDIMS document references instead of attachments as they take up less space in mailboxes.
- Use the expire function in Outlook. When sending an email click Options tab; in the More Options group, click the Message Options dialog box launcher. Under Delivery options, check Expires after and select the date and time. When the expiration date passes, the message remains visible in the message list with a strikethrough. It can still be opened, but provides a visual cue that the message is out of date and no longer needed.

Once you've deleted the items, don't forget to empty your Deleted items folder!

Need help? [Contact the Information Management team](#)