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**MEMORANDUM**

**DATE:** September 28, 2015

**TO:** McGill Researchers, Academics Leadership and Administration Staff

**C.C.:** Suzanne Fortier, Principal and Vice-Chancellor  
Christopher Manfredi, Provost

**FROM:** Michael Di Grappa, Vice-Principal Administration and Finance *WA RS*  
Rose Goldstein, Vice-Principal, Research and International Relations

**RE:** Digital Record Retention

Dear Colleagues,

McGill University is embarking on a new record retention project aimed at meeting the highest standards of financial controls for the administration of research funds as well as ensuring prompt and efficient retrieval of supporting documentation for compliance monitoring and audit purposes.

The objective of this project is to implement a secure web-accessible repository, eDocumentum, to retain and index electronic copies of documentation related to research expenses such as:

- Student Stipend Authorization form
- Payroll related documents such as offer letters and PI approvals confirming FOAPAL distributions
- POPs timesheets
- PCard receipts
- Supporting emails confirming PI approval of research expenses that do not go through a central approval queue

**During the next few weeks, workshops will be held with key users identified by the implementation team to gather detailed information regarding the scanning and indexation processes currently in place in the Faculties. This will guide the structure and deployment of eDocumentum, which is planned for release to the McGill community for Spring/Summer 2016. Once delivered, its use will be mandated for all research funds but can also be used for other fund types.**

**As effective record retention and prompt retrieval of supporting documentation is a critical element of meeting all audit requirements, including Tri-Agency monitoring reviews, we thank you for your active participation in ensuring the successful implementation of this solution.**