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> [Appendix J: Standard on Systems that Manage Information and Data](#)

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J.1 Effective date

- J.1.1 This standard takes effect on May 4, 2022.
- J.1.2 This standard applies to all systems; however,
 - J.1.2.1 Existing systems, developed or procured before May 4, 2022, will have 24 months to be fully transitioned to the requirements in this standard; or
 - J.1.2.2 For systems recognized as “legacy”, departments will have 24 months from the effective date to establish a plan to meet the requirements in this standard.

J.2 Standard

- J.2.1 This standard provides details in support of section 4.3.1.1 of the *Policy on Service and Digital* and sections 4.3.1 and 4.4.3.8 of the *Directive on Service and Digital* and replaces the *Standard for Electronic Documents and Records Management Solutions (EDRMS)* dated (June 1, 2010).
- J.2.2 Systems, either individually or when used in conjunction with one another, must:
- J.2.2.1 Permit users to discover, access, create, capture, collaborate and share information and data, as set out in R1.1.1, R1.1.2, R1.1.3 and R1.1.4 of ISO-16175-1:2020;
 - J.2.2.2 Have the capacity to manage the retention and disposition of information and data in a procedural and auditable way, as set out in R2.1.1, R2.1.2, R2.1.3, R2.1.4, R2.1.5, R2.1.6 and R2.1.7 of ISO-16175-1:2020;
 - J.2.2.3 Support the use of metadata as an active, dynamic and integral part of the recordkeeping process, as set out in R1.2.1, R1.2.2, R1.2.3, R1.2.4, R1.3.1, and R1.3.2 of ISO-16175-1:2020;
 - J.2.2.4 Support the use of enterprise information and data taxonomies and classification structures to manage, store, search and retrieve information and data, as set out in R3.2.4 of ISO-16175-1:2020;

- J.2.2.5 Support interoperability, as set out in R4.1.1, R4.1.2 and R4.1.3 of ISO-16175-1:2020;
- J.2.2.6 Have the capacity for bulk import and export using open formats, as set out in R2.2.1, R2.2.2, R2.2.3, R2.2.4, and R2.2.5 of ISO-16175-1:2020;
- J.2.2.7 Facilitate the secure management of information and data, and consideration of privacy and security categorization, as set out in R3.1.1, R3.1.2, R3.1.3, R3.1.4, R4.2.1, R4.2.2, R4.2.3 of ISO-16175-1:2020.

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