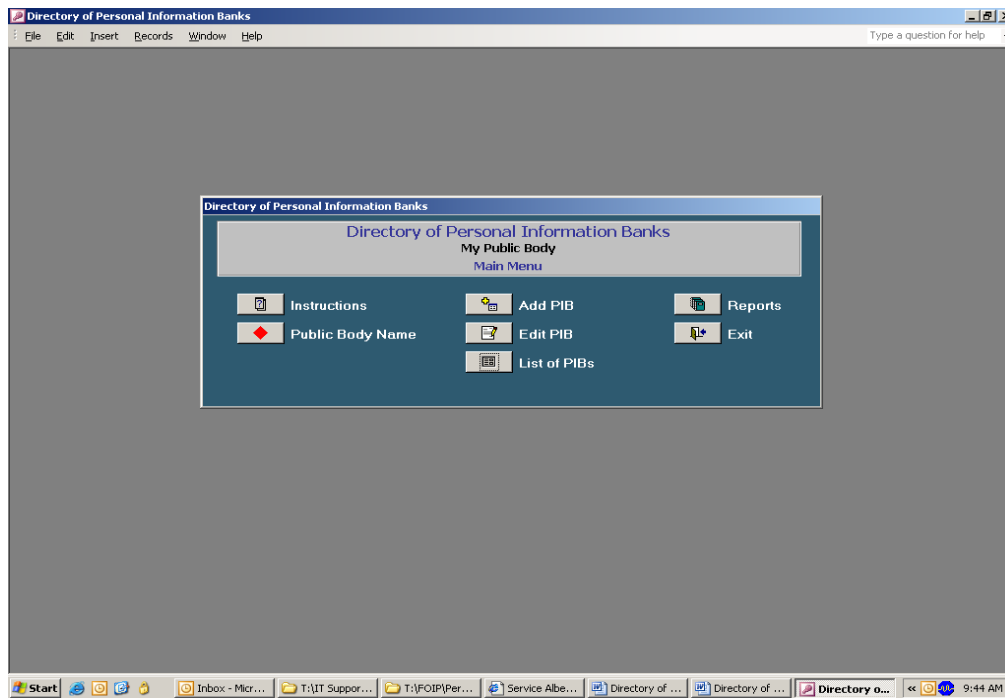


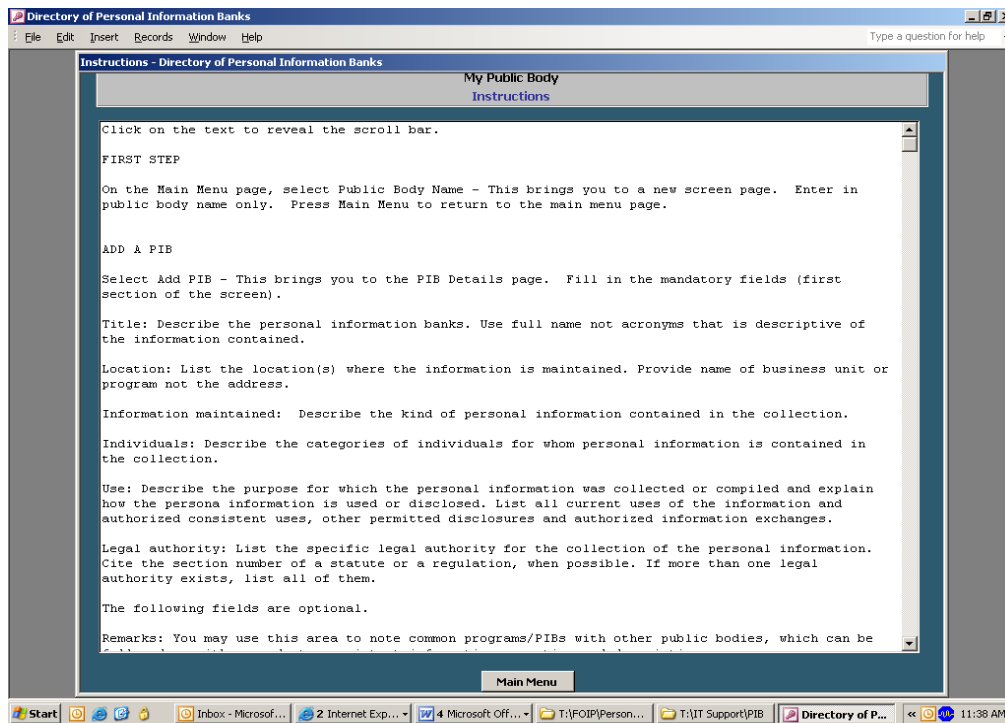
Directory of Personal Information Banks
Collection Tool Instructions

March 2008

1) INSTRUCTIONS ON HOW TO USE THE COLLECTION TOOL



On the Main Menu screen click on the **Instructions** button to read the instructions on how to use the collection tool.



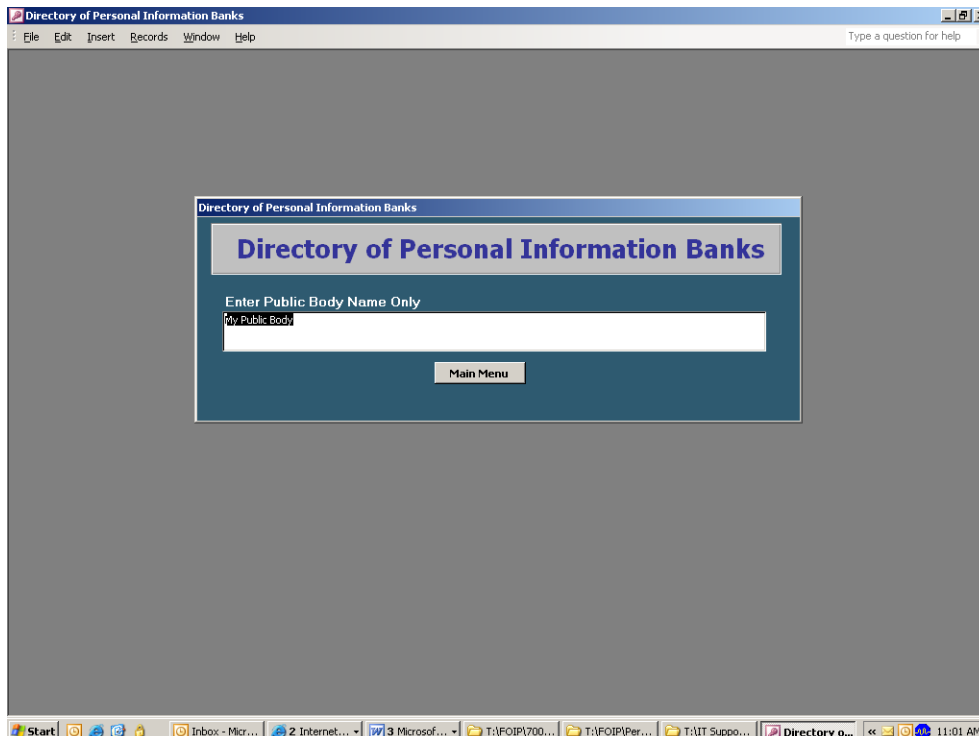
Once you have read the instructions on how to use the collection tool, click on the **Main Menu** button to return to the Main Menu page.

2) GETTING STARTED – ENTER YOUR PUBLIC BODY NAME

On the Main Menu page, click on the **Public Body Name** button.



PUBLIC BODY NAME PAGE - Enter the name of your public body here and click on the **Main Menu** button to return to the Main Menu page.

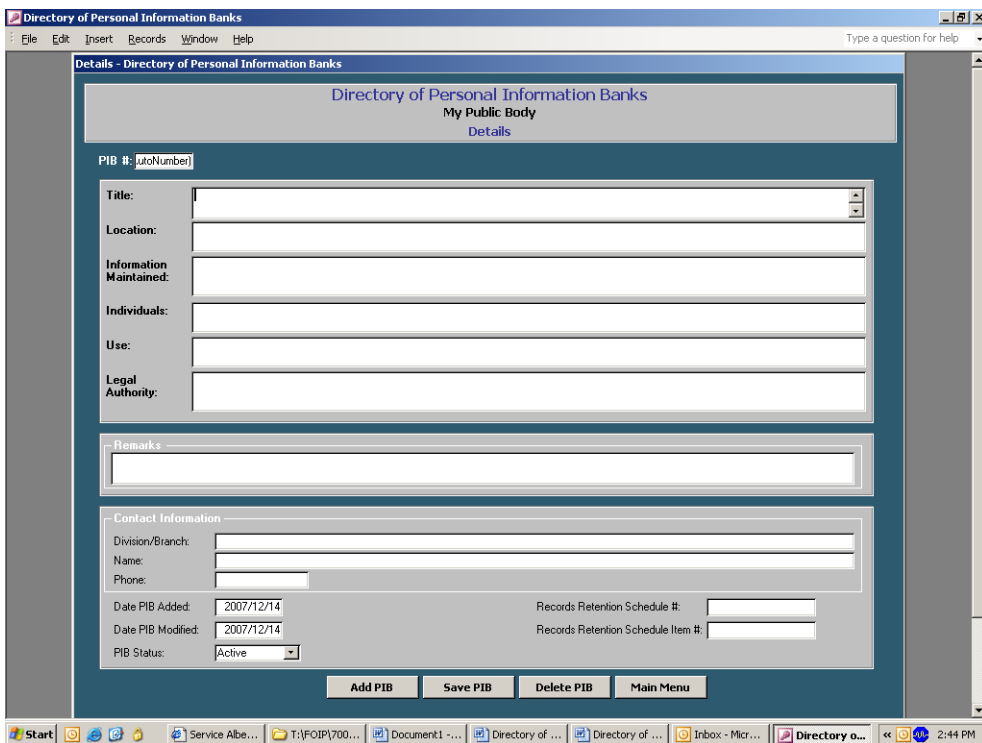


3) ADDING PIBs

On the Main Menu page, click on the **Add PIB** button to add a new PIB. This will take you to the **Add PIB** page.



ADD PIB PAGE - Fill in the mandatory (bolded) fields and the contact information. Fill in any additional information you can.



Tooltip descriptions are provided for each field when you click in the field box. Descriptions for each field are also provided below.

Field Descriptions

The following fields are mandatory.

Title: Describe the personal information banks. Use full name not acronyms that is descriptive of the information contained.

Location: List the location(s) where the information is maintained. Provide name of business unit or program not the address.

Information maintained: Describe the kind of personal information contained in the collection.

Individuals: Describe the categories of individuals for whom personal information is contained in the collection.

Use: Describe the purpose for which the personal information was collected or compiled and explain how the personal information is used or disclosed. List all current uses of the information and authorized consistent uses, other permitted disclosures and authorized information exchanges.

Legal authority: List the specific legal authority for the collection of the personal information. Cite the section number of a statute or a regulation, when possible. If more than one legal authority exists, list all of them.

The following fields are optional.

Remarks: You may use this area to note common programs/PIBs with other public bodies, which can be followed up with regards to consistent information reporting and descriptions.

Contact Information:

Division/Branch: Fill in the name of the division and branch who is responsible for the maintenance of this collection.

Name: Person's name or title.

Phone: Telephone number of person above.

Date PIB Added: The date the PIB was added to the directory. Year, month, day: 2007-12-03.

Date PIB Modified: The date the PIB was amended by either adding or deleting information from the mandatory fields. Year, month, day: 2007-12-28.

Records Retention Schedule #: The number of the official retention and disposition schedule.

Records Retention Schedule Item #: The item number of the official retention and disposition schedule.

PIB Status: Choose Active or Inactive. The default is Active.

COMPLETED PIB - Once fields have been completed click on the **Save PIB** button.

Directory of Personal Information Banks
My Public Body
Details

PIB #: 2

Title: Enter name of the PIB.

Location: Enter the business unit or program name(s) that has custody or control of personal information collection.

Information Maintained: Describe the kind of personal information contained in collection.

Individuals: Describe the categories of individuals for whom personal information is contained in collection.

Use: Describe the purpose for which personal information was collected, how it is used or disclosed.

Legal Authority: List the legal authority(ies) for collection of personal information (i.e. Statute or Regulation)

Remarks
You may use this area to note common program/PIBs with other public bodies, which can be followed up to have consistent information reporting and descriptions.

Contact Information
Division/Branch: Name of division and/or branch responsible for collection.
Name: Enter program manager name or position title
Phone: (780) 444-5555
Date PIB Added: 2007/12/14
Date PIB Modified: 2007/12/14
PIB Status: Active

Records Retention Schedule #: 2001/001-A111
Records Retention Schedule Item #: 005

Add PIB Save PIB Delete PIB Main Menu

A prompt will appear that reads **"PIB record saved successfully."** Click OK.

Directory of Personal Information Banks
My Public Body
Details

PIB #: 2

Title: Enter name of the PIB.

Location: Enter the business unit or program name(s) that has custody or control of personal information collection.

Information Maintained: Describe the kind of personal information contained in collection.

Individuals: Describe the categories of individuals for whom personal information is contained in collection.

Use: Describe the purpose for which personal information was collected, how it is used or disclosed.

Legal Authority: List the legal authority(ies) for collection of personal information (i.e. Statute or Regulation)

Remarks
You may use this area to note common program/PIBs with other public bodies, which can be followed up to have consistent information reporting and descriptions.

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Date PIB Modified: 2007/12/14
PIB Status: Active

Records Retention Schedule #: 2001/001-A111
Records Retention Schedule Item #: 005

Add PIB Save PIB Delete PIB Main Menu

Microsoft Office Access
PIB record saved successfully.
OK

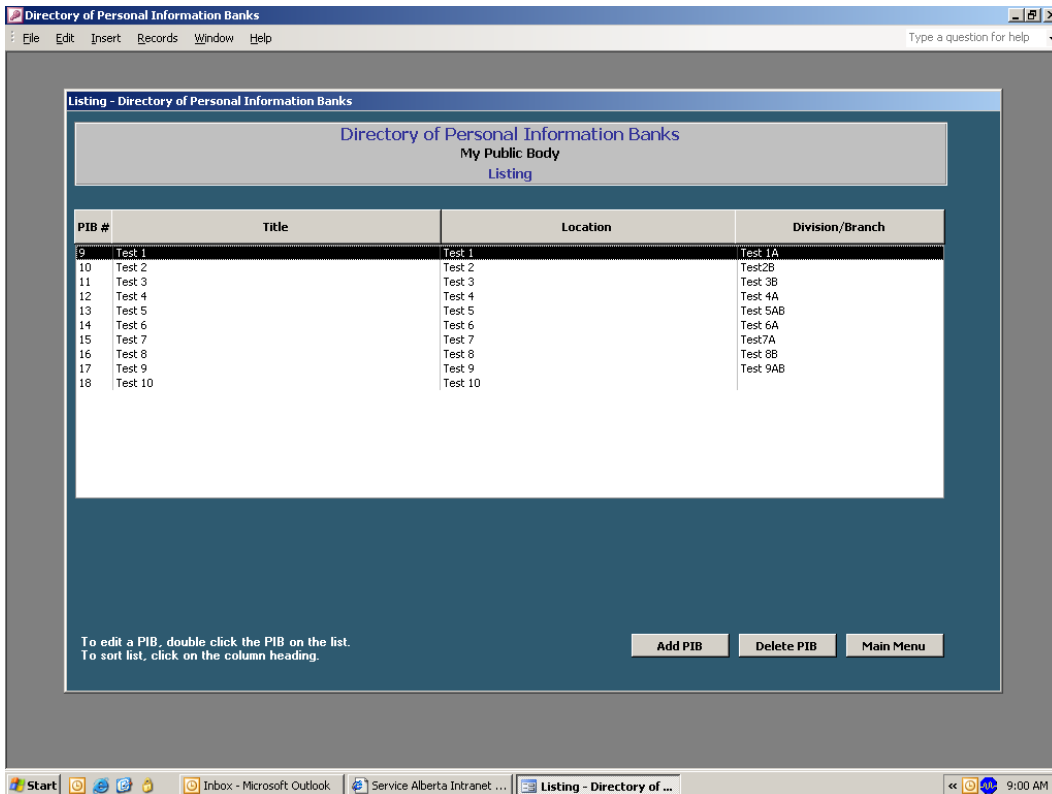
To add another new PIB click on **Add PIB** button and repeat the steps for adding a PIB. Once you have entered all your PIBs, click on **Main Menu** button to return to the Main Menu page.

4) TO VIEW A LIST OF PIBS YOU HAVE ENTERED

On the Main Menu page click on **List of PIBs**.



PIB LISTING - From this screen you can edit a PIB or delete a PIB. To edit a PIB, double click the PIB on the list. To delete a PIB, click on the PIB on the list and then click on Delete PIB button.



5) HOW TO EDIT A PIB

From the Main Menu

Click on Edit PIB button. This brings you to the List of PIBs page. Highlight the PIB that requires editing and double click. This brings up the PIB Details that can be amended. Once changes have been made, change the date in the Date PIB Modified and click on save. A prompt will appear that reads “PIB record saved successfully.” Click on OK.

From the List of PIBs page

Highlight the PIB that requires editing and double click. This brings up the PIB Details that can be amended. Once changes have been made, change the date in the Date PIB Modified and click on save.

Directory of Personal Information Banks
My Public Body
Details

PIB #:

Title:

Location:

Information Maintained:

Individuals:

Use:

Legal Authority:

Remarks
You may use this area to note common program/PIBs with other public bodies, which can be followed up to have consistent information reporting and descriptions.

Contact Information
Division/Branch:

Name:

Phone:

Date PIB Added: Records Retention Schedule #:

Date PIB Modified: Records Retention Schedule Item #:

PIB Status:

6) HOW TO DELETE A PIB

From the Main Menu – Press List of PIBs button. This brings you to the List of PIB page. Highlight the PIB that you wish to delete. A prompt will ask if you are sure you want to delete this PIB. Click on Yes, the PIB will be deleted. Please note that once a PIB is deleted it can not be retrieved, a new PIB would need to be created. If you click on No, the PIB will stay intact and you return to the List of PIBs page.

The screenshot shows a web browser window titled "Directory of Personal Information Banks". The main content area displays a table with the following data:

PIB #	Title	Location	Division/Branch
9	Test 1	Test 1	Test 1A
10	Test 2	Test 2	Test 2B
11	Test 3	Test 3	Test 3B
12	Test 4	Test 4	Test 4A
13	Test 5	Test 5	Test 5AB
14	Test 6	Test 6	Test 6A
15	Test 7	Test 7	Test 7A
16	Test 8	Test 8	Test 8B
17	Test 9		Test 8B
18	Test 10		Test 9AB

A modal dialog box titled "Delete PIB?" is displayed in the center of the screen, asking "Are you sure you want to delete this PIB?" with "Yes" and "No" buttons.

At the bottom of the main content area, there is a text box: "To edit a PIB, double click the PIB on the list. To sort list, click on the column heading." and three buttons: "Add PIB", "Delete PIB", and "Main Menu".

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 9:06 AM.

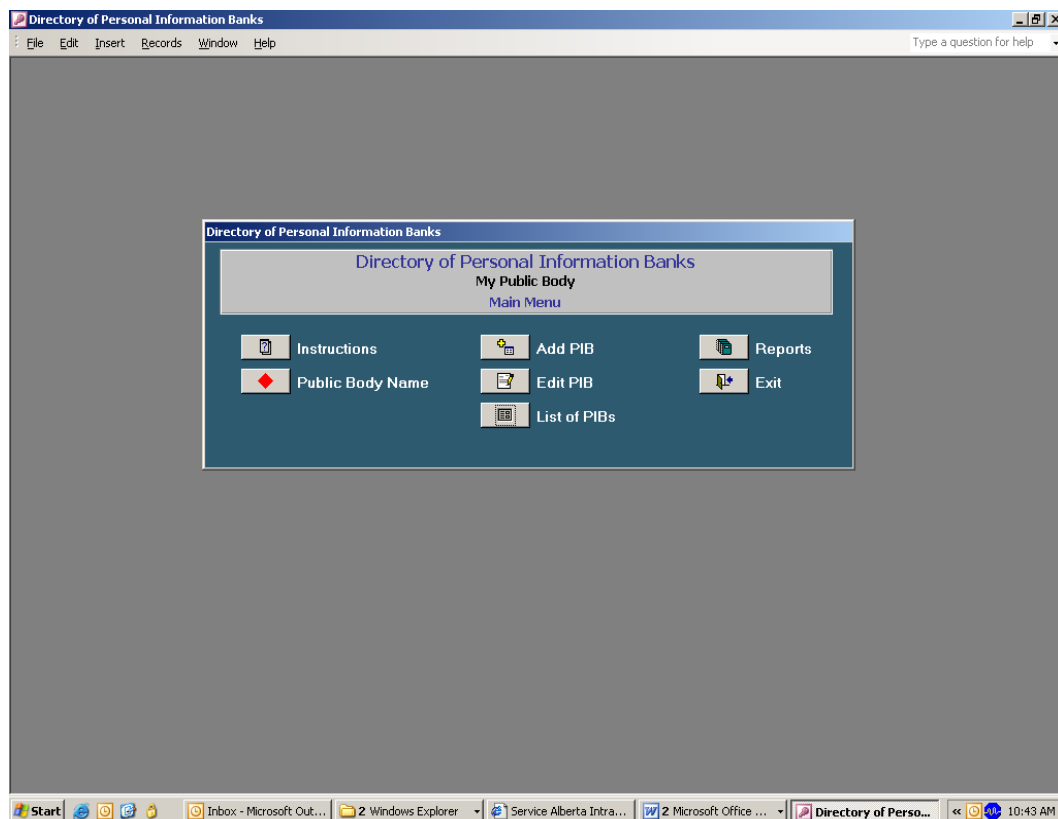
7) HOW TO GENERATE REPORTS

There are currently two distinct types of reports that can be generated **Administrative Reports** and **Webpage Report**.

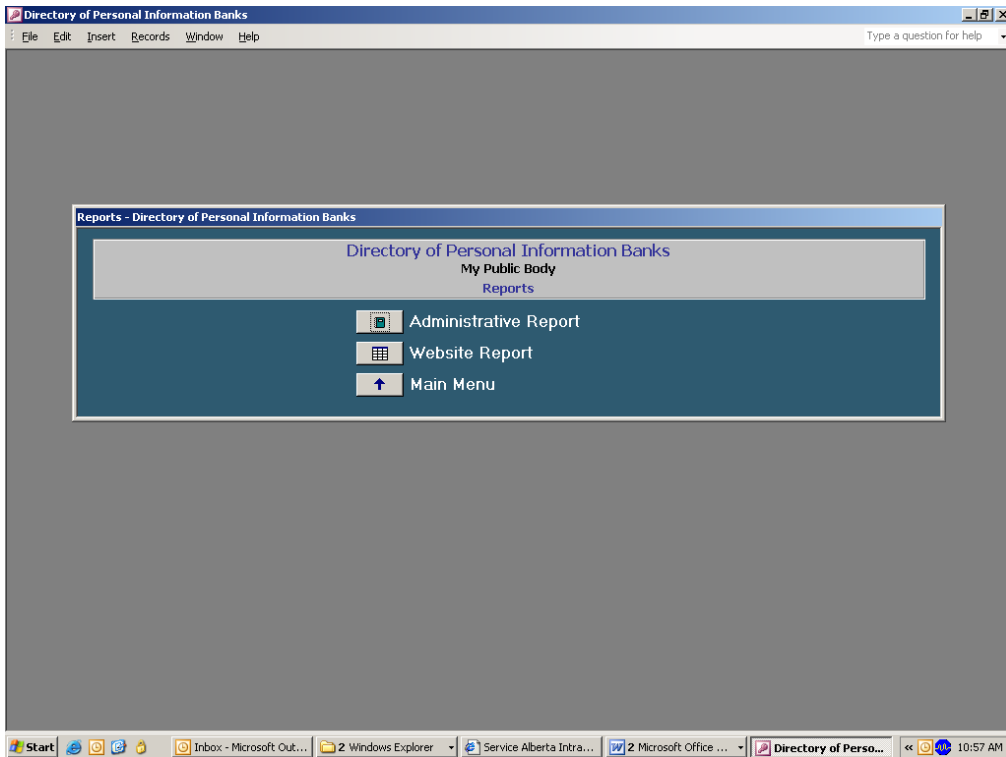
Administrative Reports can be generated for internal public body perusal. These reports can be generated sorted by any one of the fields listed under the drop-down menu. Highlight the field you would like to have information sorted by. The report will display this field first followed by the PIB # and other fields in sequential order.

The Webpage Report is a preset format report that only generates the mandatory fields legislated by law to be published on your public website. This report can be transposed into a PDF or HTML format.

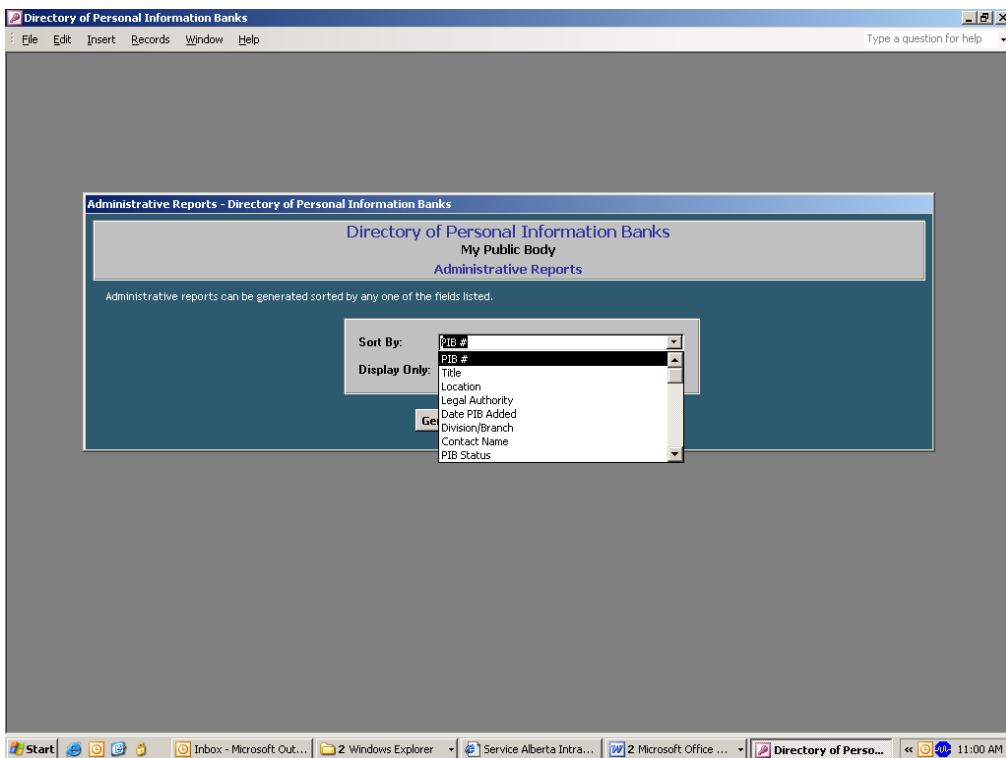
On the Main Menu page, click on the **Reports** button to go to the reports page.



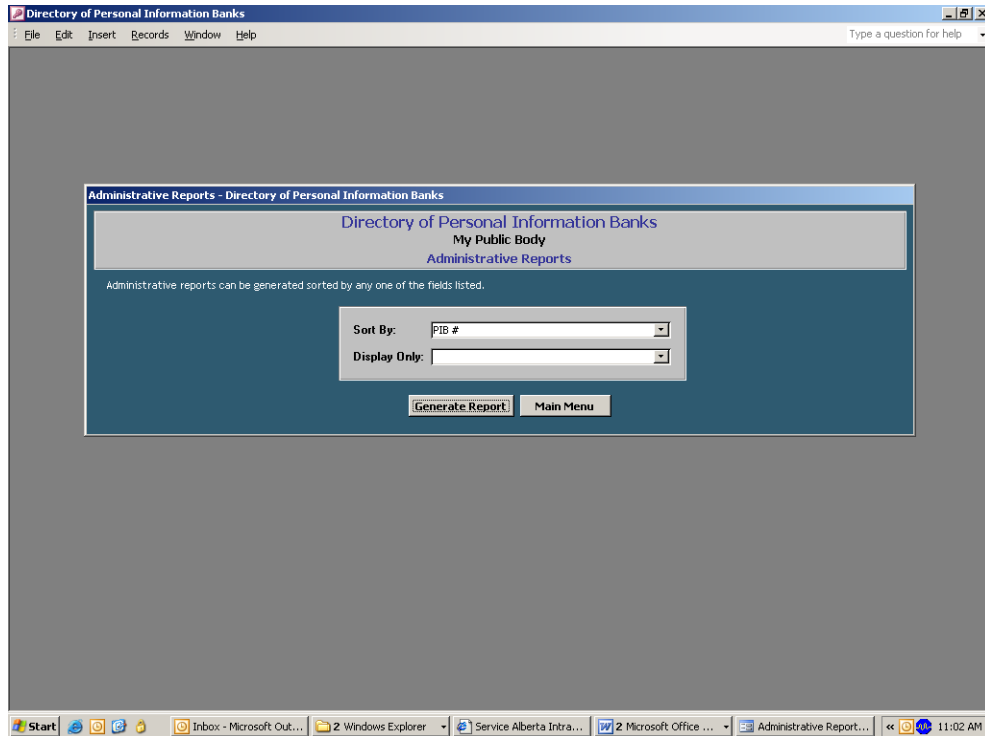
On the Reports page click on the report type you want - administrative report or website report.



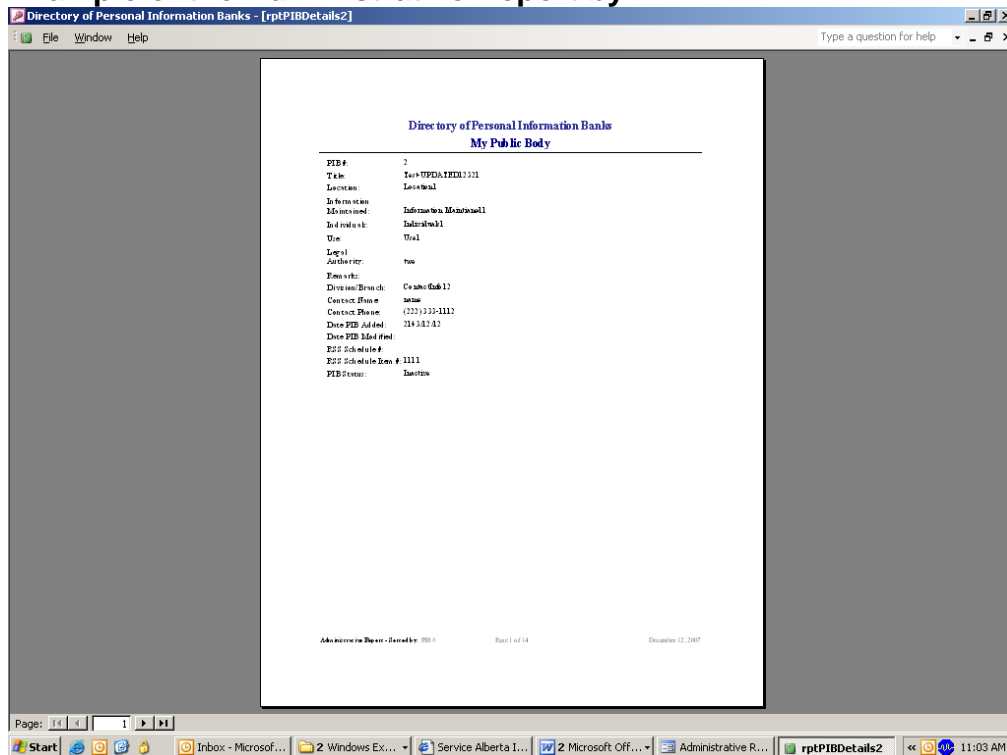
ADMINISTRATIVE REPORTS - Click on the **Administrative Report** button to select the field by which you want the report sorted by. For example, if you select PIB#, the report will be sorted by PIB#.



Once you have selected the field by which you want the report sorted, you can generate the report by clicking on the **Generate Report** button.



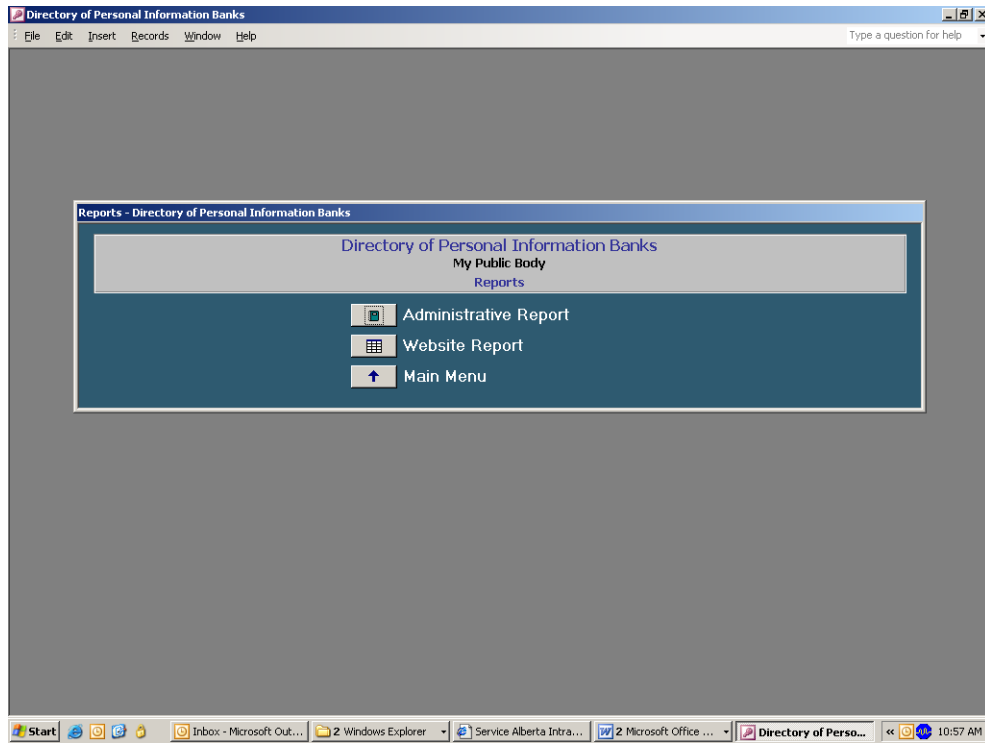
Example of the Administrative Report by PIB



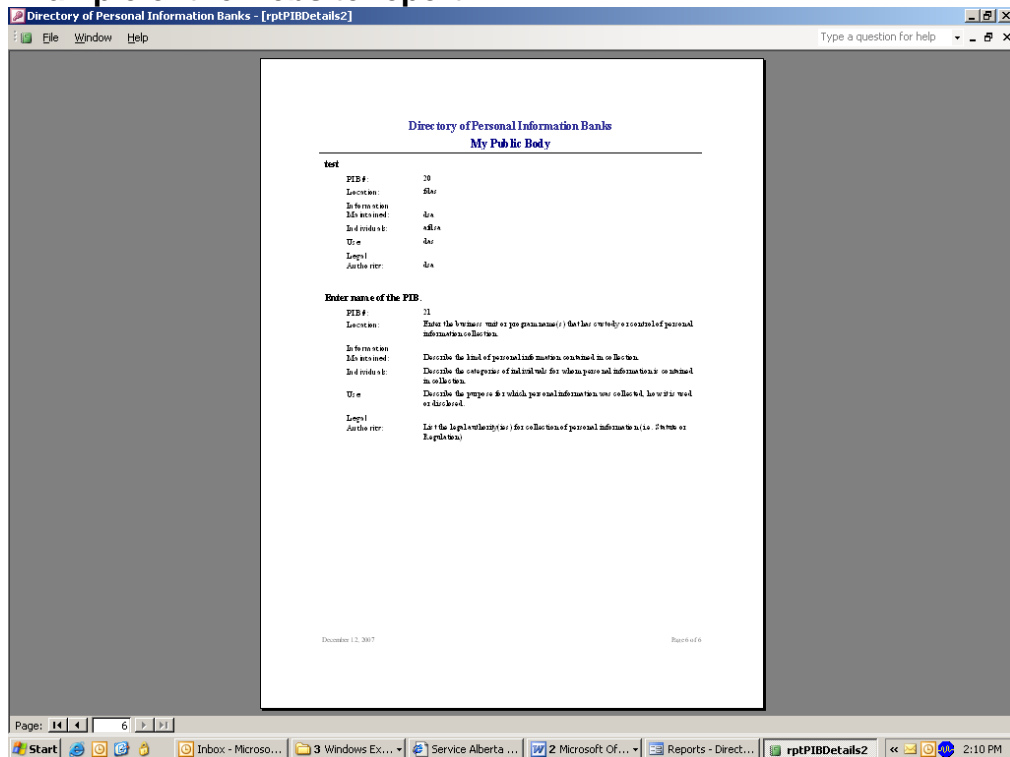
WEBSITE REPORT

The Webpage Report is a preset format report that only generates the mandatory fields legislated by law to be published on your public website. This report can be transposed into a PDF or HTML format.

On the reports page click on the **Website Report** button.



Example of the website report.



8) TO EXIT DIRECTORY OF PIBS

Click on the **Exit** button to exit the database.



This collection tool is an Access 2003 database that can be modified by your access database expert or IT support. Additional optional fields and reports can be added by a public body. All the toolbars have been hidden. If you wish to add additional fields for collection, when opening the database tool you must hold down the shift button and double click the pib icon and keep holding the shift button to press open. The toolbars are now visible. Go ahead and make your changes. If you have further access database design questions contact your public body access database expert or IT support.

HINT: Some public bodies may want to distribute the collection tool to staff within the public body to enter the information for PIBs in their area. The FOIP Coordinator may want to enter the public body name into the master collection tool before sending out the collection tool to other staff, The public body name will then display on all the screens and reports. Once the divisions or branches have returned their completed collection inventories, the FOIP Coordinator can import the information into the master Directory of Personal Information Banks database. To import or link to data in another access database refer to the available link at: <http://office.microsoft.com/en-us/access/HA012276581033.aspx> or call your IT support for assistance.