

Records Management Responsibilities

Most UVic employees receive, create, or handle records every day. In your role at UVic, you must keep records that need to be retained, ensure that records are stored securely and for the appropriate length of time, and follow the disposition process for records that do not need to be retained.

Refer to our [What Records Do I Need to Keep?](#) tip sheet for help deciding what records need to be retained.

Here are a few things to remember:

- Digital and paper records follow the same rules (consult the [Directory of Records](#))
- Manage paper and digital records at the same time (e.g., when you clean out your file cabinet also clean out your digital file storage)
- Plan for records management tasks (e.g., plan to clean up your file storage annually)
- Occasionally you will have both digital and paper copies of records:
 - If you want to destroy paper originals in favour of saving scanned (imaged) versions, consult the [Guide to the Procedures for Imaging University Records](#).
 - If the records are “born digital” and are maintained as authoritative records, then the paper can be destroyed earlier as a “convenience copies”.

How can I systematically store university records?

“Systematically” means storing them in such a way that you and others can find them quicker and identify the retention of that record more easily.

Classification System

Organize file storage using the records classifications used in the Directory of Records (DOR). For example, name folders after the functional sections and classifications.

The University has some software and guidance to help you transition to this method, contact rmhelp@uvic.ca for details.

Naming Conventions

Decide on (and use) naming conventions for files (see [Document Naming Conventions](#) for more information).

Consistency

Work with your colleagues to use the same organization methods where appropriate.

Keep an office how-to for your and others' reference.

Where can I store University Records?



Records must be stored with due attention to the security required: confidential hard copy should be stored in locked cabinets within lockable offices.



Digital records should be stored on university managed repositories – email accounts; shared drives; Connect sites; information systems (Banner). Examples of repositories that are not appropriate to use are Dropbox and Gmail.



CDs and flash drives can be useful for transporting files but should not be used for file storage and care should be taken to encrypt any confidential material.

	How long do I need to keep records?	How do I dispose of records?
Primary offices Responsible for keeping the original and/or official versions of records	Responsible for keeping those records for the whole of that retention period.	Either destruction or transfer to the University Archives. The procedure for getting that approval is summarized in the Records Disposition Process document.
Secondary offices May hold duplicate copies of university records	Records are maintained for shorter retention periods than original and/or official versions of records.	Do not need to retain the records for as long, nor do they need approval to destroy the records.

★ When records are destroyed, it must be done in a manner consistent with the security classification of the record: public records can be recycled, confidential records must be more [securely destroyed](#).

Where do I go for help?

If you need help managing your university records, check out our [Records Management resources page](#) or view these specific resources:

- [Why don't we just keep everything?](#)
- [Document Naming Conventions](#)
- [Email Management tip sheet](#)
- [Brief Guide to Imaging \(Scanning\) Procedures](#)
- [Managing Digital Records tip sheet](#)
- [Records disposition process](#)



[Records Management website](#)



rmhelp@uvic.ca