

HOW TO SEARCH THE DIRECTORY OF RECORDS

From the Directory of Records main page, you have two methods of searching:

| University of Victoria | Directory Of Records | |
|---------------------------|--------------------------------|--------------------------------|
| | | close all |
| Search | | Q |
| Administration | Computing and Systems Services | Financial Management |
| Buildings and Properties | Human Resources | Libraries, Archives and Museum |
| Governance | Safety and Security | Student Records |
| Student Services | Teaching Programs | Research |

1. Browse Database:

This enables browsing and review of main topic headings. They exist as functional descriptions elated to the overall Directory Sections (i.e. Administration, Human Resources, Student Records).

Example: If you know the records you have are from Human Resources, click on the HR section and look for the most likely heading:

| Administration | Computing and Systems Services | Financial Management |
|--------------------------|---|--------------------------------|
| Buildings and Properties | Human Resources | Libraries, Archives and Museum |
| | <u>HR001 General</u> HR010-20 President Search case files | |
| | HR010-30 Academic Search case files | |
| | HR010-40 Senior Administrative Search case files HR010-50 Staffing - Competitions UP000 20 Competitions | |
| | HR020-20 Continuing/Regular Employees HR020-30 Temporary/Term Employees | |
| | <u>HR020-50 Emeritus/Emerita Faculty</u> <u>HR030-20 Performance files: Regular Faculty and Librarians</u> | |
| | HR040 Employee Benefits HR050 Leave Management | |
| | <u>HR060 Return to Work Consultations</u> <u>HR070-03 Non-compensatory Accidents and Injuries</u> | |
| | HR070-04 WorkSafe BC Cost Reports HR070-20 WorkSafe Claim records | |
| | <u>HR090 Training - Programs and Courses</u> <u>HR100-20 Staff Salary Review files</u> | |
| | HR110-02 Job Classification Standards HR110-20 Job Description files | |
| | HR120-02 Employee Group Agreements HR120-20 Employee Group Interpretation | |
| | HR120-30 Employment Issues HR120-35 Arbitration | |



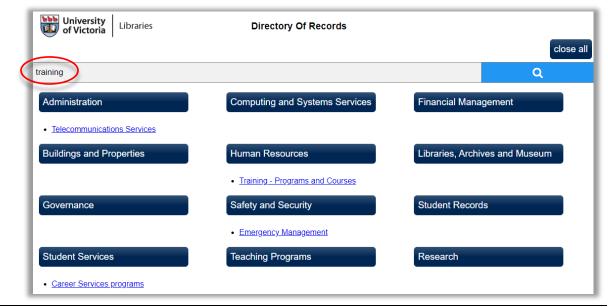
| | | HR020-30 - | | |
|--------------------------|---|--|-----------------------|--|
| earch | | Temporary/Term Employees: The purpose of HR020-30 is to document the | Q | |
| Administration | Computing and System | work history of all temporary employees of the | I Management | |
| Buildings and Properties | Human Resources HR001 General HR010-20 President See HR010-30 Academic See HR010-40 Senior Admin HR010-50 Staffing - Con HR020-20 Continuing/Re HR020-50 Emeritus/Eme HR030-20 Performance HR030-20 Performance HR040 Employee Benefi HR040 Leave Managem HR050 Leave Managem | Scope And Contents: Records include employment application and/or curriculum vitae, reference letters, recommendations for appointment, requests for approval for faculty appointment, record of employment, appointment status notices, copies of immigration documents, employee history sheets, position status change requests, pay authorizations, payroll instructions, faculty association/scholarship fund forms, employees' benefit checklists, appraisals, staff development certificates, Work Study student time sheets, letters of commendation/discipline, letters of resignation, termination notices, and related documentation and correspondence. | , Archives and Museum | |
| | HR070-04 WorkSafe BC HR070-20 WorkSafe BC HR090 Training - Progra HR100-20 Staff Salary R HR110-20 Job Classifica HR110-20 Job Descriptic HR120-02 Employee Gr HR120-02 Employee Gr HR120-35 Arbitration HR120-40 Appeals HR120-40 Appeals HR120-40 Environment | Retention Rule: Departmental offices: at termination transfer original staff (non-faculty) records to HR. Departmental Offices: at termination keep short term (not sessionals) faculty members files for 3 years, then transfer to VPAC. HR: At termination keep long term non-faculty for 7 years. VPAC: keep faculty for 7 years after termination. Disposition: Secure destruction.* | | |

As you hover your mouse over each link, look through the Purpose Statement and Scope and Contents (the overall description of the series), to determine the best fit for the records.

2. Keyword Search:

The keyword search is a directed technique, and is most useful if you are unsure how records should be classified. The search will allow you to enter a keyword which will you can search all fields.

Example: If you need to classify a set of training records, you could start by searching all fields with the term "**training**" to see if a relevant entry appears:





Look through the Purpose Statements and Scope and Contents of the results to see if they correspond with the records.

When deciding how to properly classify records, think about their overall function. For example: training records should not be classified based on the *type* of training (i.e. Records Management training records do not belong in Administration - Records Management) but on the *function* of training itself (so Records Management training records belong in Human Resources - Training). This is not always an intuitive process, however thinking from the broader perspectives of other departments or offices may help you better understand the records' function and corresponding section.

Clicking on any of the displayed links will take you to the full citation for the category:

| The purpose of HR090 is | s to document the | on-campus development ar | d/or delivery of professiona | I training and development opport | unities for faculty |
|------------------------------------|---|---|------------------------------|---------------------------------------|---------------------|
| and staff, delivered both | online and in pers | on. | | | |
| Scope and Contents | Records include training packages, course applications, course attendance records, certificates or other completion records, course/instructor evaluations, and related documentation. | | | | |
| | Offices responsible for ng or delivering the | Secondary Offices Office(s) contributing to program or course delivery. | Vital Records No | Electronic Systems None identified | |
| Retention rule | Keep for two years after program or course is no longer offered. Course materials collected as an attendee are considered transitory records. | | | | |
| Disposition | Secure Destruc | tion. | | | |
| Retention/Disposition Rationale | Legal: None. Administrative: Archival: None. | Required as long as course | is offered. | | |
| Approval Date | 2015- | 09-17 | Date of Last Review | 2015-09-17 | |
| Security Classification (lin | <u>k</u>) Internal | | | Personal Information Bank | n No |
| | This series is intended for both the development of course material and delivery; it is possible there may be multiple primary offices if one develops and delivers the material but another unit manages the scheduling and attendance. | | | | |

You can also look at the Retention Rule and method of Disposition fields; these will tell you how long the records are to be kept, and their disposition (or what do with them after their retention period is over: destruction or permanent transfer to the Archives).

Finally, if you are still unable to find what you are looking for, or are unsure if you've found the correct series, contact us at <u>rmhelp@uvic.ca</u>.