

Records Management Basics

What is Records Management?

Records Management is the systematic management of records and information from creation or receipt through to their final disposition (transferred to archives or destroyed).

Records Management is also a shared responsibility. All staff are responsible for ensuring they comply with Records Management policies and procedures at their office level and at the university level.

What is a University Record?

University records are any recorded information, regardless of format, created, received, or maintained by University academic, administrative, and governing bodies in order to support legal obligations or other University business operations and transactions.

These may include minutes, power point presentation files, reports, statistics, architectural drawings, emails, photographs, video, spreadsheets, financial records, student files, and much more. It's important to remember that the physical format is irrelevant.

What is a Transitory Record?

Transitory Records are records created or received that are temporarily useful. These records will have no further value beyond: Completing a simple transaction, Using to prepare a University Record, Acting as a convenient reference copy for an office or individual that does not have primary responsibility for that record. Check out our [Tip Sheet](#) on Transitory Records for more guidance.

Creating Records

Remember that individuals can request access to their personal information, which may include views and opinions of them, made by another person.

Keep the following principles in mind when creating a record:

- Create records with the expectation that they may be disclosed.
- Do not include unnecessary information, especially relating to individuals.
- Take factual minutes and avoid unnecessary detail.
- State your own views and opinions as objectively as possible.

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