

## Classification

*Classification* refers to the way you organize your files. The [Victoria University Records Schedule](#) classifies university records according to the following principles.

### Functional Classification

Good recordkeeping practice calls for organizing records according to the functions to which they relate (e.g., finance, human resources, governance), rather than organizing files alphabetically. Alphabetical organization of files can make it difficult to locate records (as you must remember what terms you used to label the file), and disperses records relating to a single activity/function throughout your filing cabinet or electronic folders. Functional classification also facilitates the disposition process, as records pertaining to a particular function typically have the same retention length (and hence can be quickly grouped together for destruction or archival transfer).

### Multi-Level Classification

The Victoria University Records Schedule (VURS) organizes records in 3 levels of classification.

**The first level** is divided into the major functions of the University. At the very least, office records should be organized according to these broad categories:

- Administration (ADM)
- Alumni and Advancement (ALU)
- Buildings and Properties (BLD)
- Campus Services (CAM)
- Finance (FIN)
- Governance (GOV)
- Human Resources (HRS)
- Information and Collections Management (INF)
- Liaison and Cooperation (LSN)
- Public Relations and Communications (PRC)
- Research and Publications (RES)
- Health, Safety and Security (SAF)
- Students (STU)
- Teaching and Academic Programs (TAP)

**The second level** further subdivides a function into its major activities. For example, the Finance function includes:

- Accounting
- Audit
- Banking
- Budgeting
- Endowments and Trusts
- Fundraising
- Payroll and Income Tax
- Procurement

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- Taxes

The first section in each function also contains a “general” section, where records related to planning, committees, policy, forms and statistics (common to most functions) can be filed. The last section includes a section for reference materials (e.g: publications and copies of documents created by outside organizations, kept on hand for reference purposes only).

**The third level** breaks down each activity/function into a record type, which has its own retention and disposition guidelines. For example, the accounting section in finance is broken down into:

- Account Management
- Accounts Payable
- Accounts Receivable
- Journals

This 3-level arrangement actually **allows for alphabetical filing** as well, if you label a file folder with each level of classification (or, in the case of electronic records, name each folder and file according to the terminology in the schedule).

For example, file folders can be labeled as such:

- GOV—Board of Regents—Budget Committee
- GOV—Board of Regents—Pension Committee
- GOV—Senate—Awards Committee
- STU—Admissions
- STU—Admissions—Case files
- STU—Admissions—Transfer Credits
- STU—Programs—International Friendship Exchange
- STU—Programs—Vic One
- STU—Programs—WUSC

The third level may be **further broken down**, depending on the volume of records. For example, a file folder may be created for each fiscal, financial or academic year, meeting date, student name, or a particular aspect of an event or activity.

## File Plan

Your office should work with the Records Manager to maintain a file plan, which reflects the Victoria University Records Schedule. The office file plan will enable consistent filing, efficient retrieval, and easy disposition. Contact the [Records Manager](#) for a template, a copy of your existing file plan, or to request a file plan update.

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