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**What are my RM responsibilities?**



- Ensure the records lifecycle is fully met and applied to all records in the Institution
- The records lifecycle which allows the flow from creation to disposition
- Collaborate with SU's records management council for review and
- Manage records in accordance with SU's records management and the act records act

**Why manage records?**



- To ensure records are kept for the appropriate period of time
- To ensure records are kept in a secure and accessible location
- To ensure records are kept in a format that is accessible and usable
- To ensure records are kept in a way that is consistent with the act records act

**The Records Lifecycle**



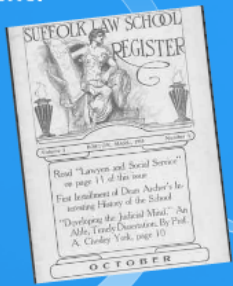
**Permanent Records in the Archives**



- Documenting Suffolk's history and separate legacy
- Exhibits and public programming
- Research assistance and classroom instruction
- Reference services
- Large-scale archiving, scanning, digitization, and destruction projects
- Archival and manuscript collections

**What is Records Management?**

- A system for providing control over records from creation to disposition
- A system for ensuring that records are retained to meet all operational, legal, and intrinsic needs
- It is also what we all do every day as part of our jobs



**What is a Records Retention Schedule?**

- Provides instruction on how long to keep records (retention) and when they can be destroyed or transferred to the Archives (Disposition)
- Ensures that records are kept to fulfill audit, legal and regulatory requirements.
- Empowers you to make thoughtful decisions about retaining and destroying records.

<https://www.suffolk.edu/office/su/ma/records/retention-schedule>

**What are records?**



Any written or recorded information that is created, received, or received by any employee or unit of the University in connection with University business.

- Examples of records include: documents, forms, email messages, electronic files, data and information in computer files or systems, photographs, films, audio recordings, or other documentary materials, and any copies thereof.
- Nonessential records are records such as drafts, duplicates, and convenience copies, are not required to be maintained once their administrative use ceases.

SU Records Retention Policy, 2015



**Tips for getting started**



- Match your records to the Records Retention Schedule
- Clean out records that are beyond their retention periods.
- Only keep on-site those records that you need – use off-site storage for other records
- Send permanent records to the Archives when no longer used in office
- Maintain your records on an ongoing basis

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 Moakley Archive and Institute

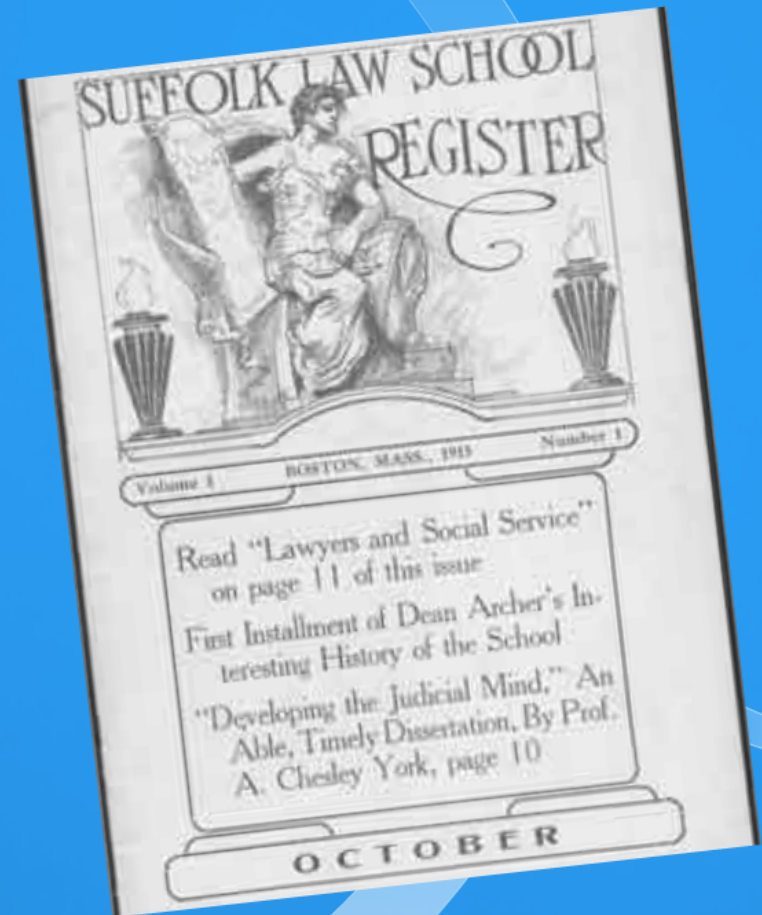
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## SU Records Retention Policy, 2013

### Not all documents are records!

- Extra copies of documents kept only for reference or convenience
- Extra copies of publications kept for distribution purposes
- Faculty research notes or materials developed for classroom use
- Personal or private papers/emails unrelated to University business
- Reference materials such as photocopies of articles used for research or solely for reference

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# What are my RM responsibilities?



- Create the records necessary to carry out the activities for which you are responsible
- File records in a manner which allows for them to be safely stored and efficiently retrieved when necessary
- Be familiar with Suffolk’s records management policies (on website)
- Manage records in accordance with Suffolk’s records management policies and procedures

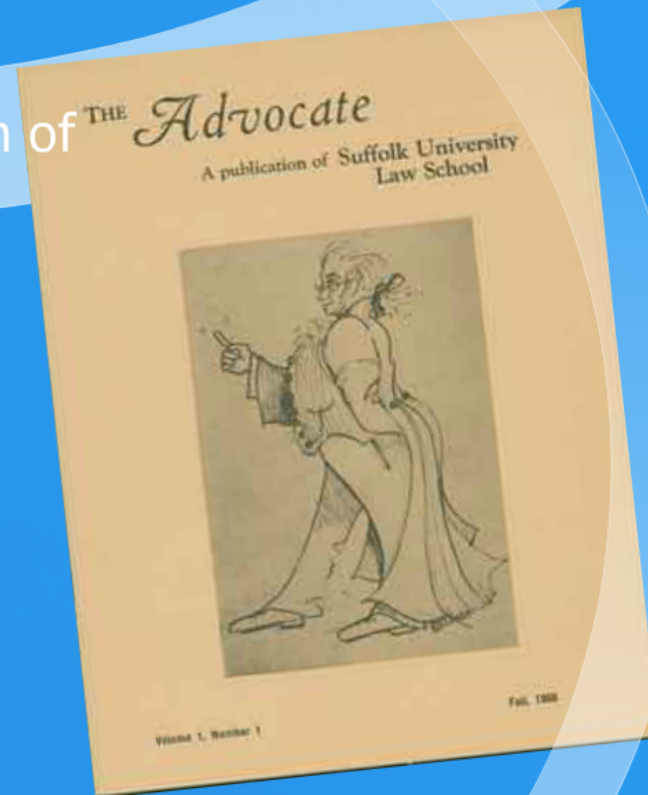
## Why manage records?

- Control creation and growth of records
- Reduce operating costs



# Why manage records?

- Control creation and growth of records
- Reduce operating costs
- Improve efficiency and productivity
- Ensure legal and regulatory compliance
- Safeguard vital information
- Support better decision making
- Preserve corporate memory--  
We wouldn't have an Archive without your help!!



# The Records Lifecycle

## DISPOSITION

Secure, defensible destruction  
Permanent preservation

## CREATION

File plans/naming conventions  
Shared storage help  
Supported record types

## STORAGE

Inexpensive offsite storage  
Climate controlled, safe, indexed filing  
Long-term preservation  
Efficient retrieval

## USE

Maintenance and access  
File plans  
Version control





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<https://wikis.suffolk.edu/display/SUMA/Records+Retention+Schedule>



Create the desired,  
Maintain the required,  
Destroy the expired!



## Tips for getting started

- Match your records to the Records Retention Schedule
- Clean out records that are beyond their retention periods
- Only keep on-site those records that you need – use off-site storage for other records
- Send permanent records to the Archives when no longer used in-office
- Maintain your records on an on-going basis



## Permanent Records in the Archives

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