Campus-wide Records Management at BYU

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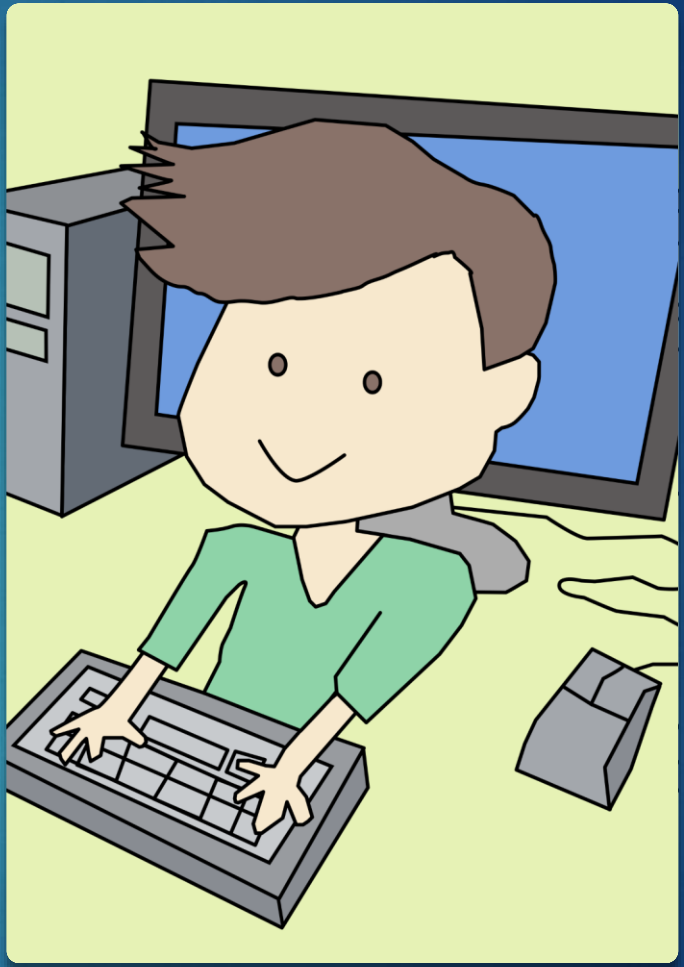
- Record Liaison in each department
  - We interface with them, they interface with department
- Boxes and Electronic Records
  - SharePoint
  - Archival records
- Flexibility from department to department
- Role of Liaison – 4 steps
- Records management is more grassroots
  - We're there to provide support
  - No mandate from University Administration, but given support



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Getting Started with Records Management

- **Step 1: Know the responsibilities of being the Record Liaison.**

  Each department should have a Record Liaison. If uncertain who the Record Liaison is for the department, please contact the URIM Office Assistant (2-1670).

- **Step 2: Identify department records by completing a Department Retention Schedule.**

  Identify records in the department, where they are, and how long they should be kept.

- **Step 3: Organize the physical records.**
  - Dispose of unnecessary records and non-records.

  (Check first to see if the department is on Litigation Hold.)
  - Secure confidential records to prevent unauthorized access.
  - Send inactive records to the Records Center.

- **Step 4: Organize the electronic records.**
  - Dispose of unnecessary records and non-records.

  (Check first to see if the department is on Litigation Hold.)
  - Secure electronic records by moving them to SharePoint or another secure location.
  - Move records of historical value to the "Transfer to Archives" folder in SharePoint.

  Click here for a downloadable .pdf of this document: Getting Started with Records Management

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- Website
  - Sites.lib.byu.edu/recordsmanagement
  - Cheat sheets for SharePoint
- Online Training Modules
- In-Person training
- Regular newsletter and other communications