

Using Box to Manage Department Records

Electronic records identified on your Department Records Retention Schedule (DRS) have the same recordkeeping requirements as their paper counterparts. Box is approved for the storage and management of departmental records and provides the following improvements over a standard file share:

- ◆ Collaboration capability (capacity to share files with others)
- ◆ Remote access to files via Laptop or Mobile App
- ◆ Ability to drag emails into Box Drive (talk to your CSR about installing Box Drive)
- ◆ Increased security (requires DUO authentication)
- ◆ The capacity to upload 32 GB file size, which continues to grow.

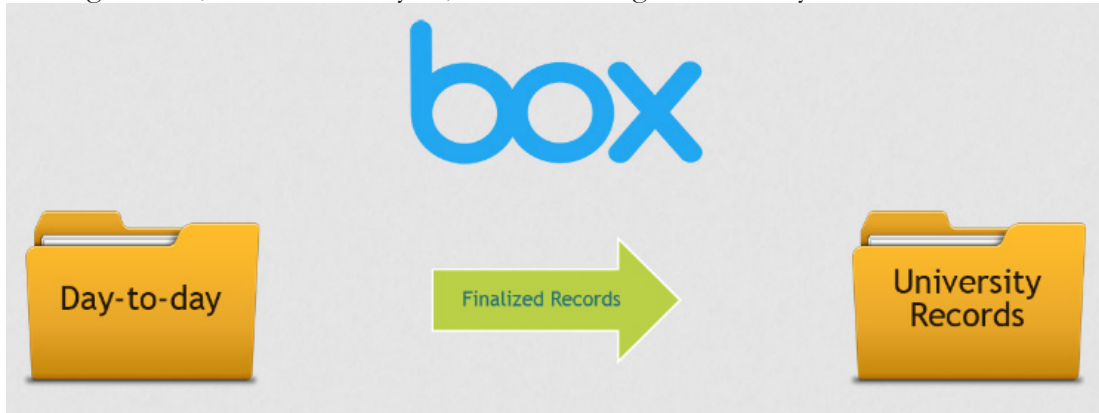
The following two types of information are usually stored in Box:



Using Box for Department Records

Box is the designated storage repository to manage the retention of records and ensure historical records are preserved. Managing records correctly increases productivity and reduces costs and risks.

Moving records, at least once a year, into the managed University Records area of Box will ensure the following:



- ◆ Ownership of department records remains with the department
- ◆ Records cannot be altered or deleted until they have met their retention
- ◆ Record destruction is managed by the system after approval by the department
- ◆ Records of historical value are automatically transferred to the University Archives.

If you need help using Box see the “How to Use Box” Sheet on our website, recordsmanagement.byu.edu, under the “Electronic Records & Using Box” tab.

The Records Liaison and Department Head/Supervisor have been granted access to the Electronic Records Center on Box, for their department, and can share access with others as needed (contact 2.6260 if you do not have access to this folder).

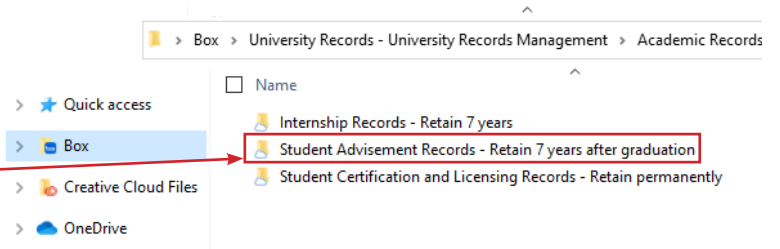
At least once each year, Records Liaisons are responsible to move finalized records, identified on their DRS, from their Day-to-Day department work area into the University Records area of Box where retention is managed. The folder structure of the University Records area parallels the DRS Worksheet.

For Temporary Records with Retention Periods:

Each folder contains sub-folders which have the retention defined as part of the folder name.

Example:

Finalized records of recently graduated students are moved into the “Student Advisement Records” Folder, which shows they will be retained for 7 years.



Helpful Hints

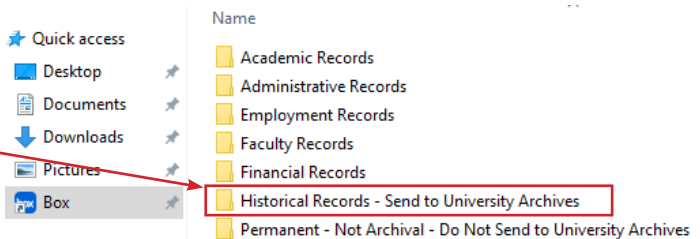
- Folders not found on the department’s DRS can be deleted by the URIM Records Analyst
- Folders needed but not found within the folder structure can be added by the Records Liaison
- * Contact University Records Management at 2.2161 to add additional folders, so that retention rules can be setup for them.

For Historical or Permanent Records:

A copy of records placed into the Historical Records area will be automatically transferred to the University Archives for long-term digital preservation. These records will remain available to the department in Box.

Example:

Moving finalized annual reports into the Historical Folder>Annual Reports once a year automatically sends a copy down to University Archives.



Helpful Hints

- Records placed into the Permanent folder will be preserved, but will not be sent to the Archives
- New sub-folders can be added to both the Permanent and the Historical folder as needed.