Using the Electronic Records Center (ERC)

Electronic records identified on your Department Records Retention Schedule (DRS) have the same recordkeeping requirements as their paper counterparts. The Electronic Records Center (ERC) on Box (University Records - [Department Name]) is designated for the storage and management of department records and provides the following benefits over a standard file share:

- Ownership of the records is tied to the University during Department turnover
- Records cannot be altered
- Records are managed in accordance with federal & state laws, and university policy.
- Records of historical value are preserved
- Record destruction is managed by the system after approval by the department
- 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)

Electronic records managed in the ERC have the strictest level of security available. Only the submitting department has access to these records until shared with others. Please use wisdom when sharing confidential university information. (For more information, please use the Information Use, Privacy, and Security Policy)

How to use the ERC for Department Records

The ERC provides departments with a storage location for electronic records. As mentioned above, records placed inside the default folder structures will automatically have retention mapped to them. For example, placing a housing contract in "Administrative Records - Retain for 6 years then destroy" will attach a 6-year retention to that contract.

Historical records placed in the "Historical Records - Send to University Archives" will automatically have a copy of them sent to the Archives. For permanent records that should not be sent to the University Archives, use the "Permanent Records - Do not send to University Archives".

Records should be moved at least once a year to the ERC. If you are experiencing any technical difficulties, please contact Rebekah Webb at 2-6260.

Customizing your Electronic Records Center

- Each department's folder is fully customizable (Adding and Deleting folders, etc.) as long as the following standards are met:
- Changes to the default folder structure of the University Records Folder are made by working with University Records and Information Management (URIM).
- Electronic records or folders of electronic records are only placed in a folder with retention listed on it (i.e. Administrative Records - Retain for 6 years then destroy)
- When granting permissions to others in the department, the records liaison maintains limited access to the folder through use of the variety of permissions available on Box. Records Liaisons will initially have View/Upload access to their folders, but after taking the ERC Training, they will be granted permission to edit and share their folders and records as needed.

Sharing ERC Folders Within Your Department

To protect the integrity and security of department records, please follow these guidelines when sharing ERC folders:

- ❖ Only the designated Records Liaison should have editor access to organize and manage ERC folders. If someone else in your department has a legitimate need to organize and manage folders, they should first take the ERC Training before receiving editor access.
- ❖ Viewer/Uploader access may be granted to any staff or faculty who need to deposit or retrieve finalized records from the ERC. Here are a few examples:
    - Faculty uploading or accessing finalized syllabi or course outlines
    - Administrators retrieving final, historical reports for reference
    - Staff assistants submitting approved communications or finalized event documentation.
- ❖ University Records Management will only provide editor access to the designated Records Liaison after completing the ERC training. It is the responsibility of the Records Liaison to keep track of who they have given access and removing such access when the need no longer exists or after individuals with access leave the department.

    If you need help using Box, see the "How to Use Box" *Sheet on our website, recordsmanagement.byu.edu, under the "Electronic Records Center" tab.*

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