

HERITAGE AND INFORMATION GOVERNANCE
Records Retention Schedule for [Management] Reporting

This retention schedule is based on the recommendations made by the Joint Information Systems Committee. The letter indicates the final disposition of each type of record, and applies to original records. Where copies of originals are kept locally, these can be destroyed when these are no longer required:

A = 1 copy to be transferred to the University Archive. See Retention Schedule Guidelines for further details.

D = Destroyed.

The number following the letter code indicates the period (in years) after which records may be destroyed, and is the minimum retention period required by best practice or legislation. It assumes a new file is opened at the start of each academic, calendar or financial year, and is **always** calculated from the date of the last record in the file.

For submission of statistical and other data and reports to HE regulatory bodies, use HE/FE SECTOR - HE/FE SECTOR REPORTING.

FOLDER STRUCTURE	Examples of Types of Record	Retention Period	Legislative Authority
REPORTING/COLLECTION <ul style="list-style-type: none"> • collecting and maintaining management information • specifying data to be submitted for central collation and maintenance • creating and maintaining central data sets. 	Dataset specifications and protocols for submission and collation of data, e.g. SAS, Oracle, EIMS, REBUS, etc.	Superseded If datasets are archived, dataset specifications and protocols should be archived with them.	
REPORTING/ANALYSIS <ul style="list-style-type: none"> • analysing management information and producing reports • producing standard, routine analyses and reports • producing customised, ad hoc analyses and reports to meet individual requirements. 	Management information reports	Current year + 3 years	