

Preservation/Retention Subgroup

January 26, 2009

Agenda Item 1 – E-mail policy proposal

D1) Paul went over the committee's proposal regarding e-mail policy for retention and preservation. We would like to discuss this with the full CDS at our next meeting on February 2, 2009. (Distributed to CDS committee and in OnCourse under Resources).

This proposal is focused on Exchange e-mail which is primarily for administrative staff at I.U., including academic administration. Paul will re-write to reflect this.

Dan asked the reason for putting a timeframe on deleting e-mail (30 or 60 days). Paul indicated that the purpose is to enable people to handle their e-mail in a timely fashion. Kathleen proposed changing the time frame to 60 days. There is also a policy in place, IT-03, that account data in personal areas is deleted 180 days after the accounts are disabled.

D2) Shared repository – the point is for it to be shared within the department. Dennis thinks it is best if UITS develop the guidelines for setting up a shared repository. Dan asked how these repositories would be accessed through Webmail; Dennis indicated that he feels that UITS needs to provide these shared repositories so that they would be accessible through Webmail.

D5) The goal is to develop and get the policy approved; then we need to make the specifications clear so that UITS can determine what is feasible and in what timeframe. In 2a. Paul will change it to reflect Exchange server, NOT departmental server.

D6) Dan indicated that HR could develop guidelines for retaining e-mails about individuals who have left the University.

D7) Kathleen raised the issue that maybe we state what the policy is regarding e-mail; we feel that there is already a policy statement regarding e-mail and the fact that it can be used for incidental personal e-mail.

D8) Paul will reword the document as a "philosophy statement" rather than a policy. Dennis indicated that as we get into setting up this type of infrastructure, then we will need a way to periodically delete some of this information rather than keeping it indefinitely.

Agenda Item 2 – UHRS - Records/Files Retained by Departments

D1) Paul's aim is to get to a point where we understand what the departments keep. HRMS and FMS have completed draft documents. Once we have completed documenting these for each major area is there some way to make it available centrally?

D2) Kathleen noted that we could say that if it has to be retained, it should be retained centrally then it would make it easier to keep only one copy. This might be a better solution than we have now where people tend to keep everything.

D3) Dan's document is an attempt at trying to document what we are asking departments to keep. We should look at both of these documents and see what we think should be kept centrally. Purchasing and Travel are also needed. Dan indicated that from this schedule they will develop retention policies for all of these documents. Dan reminded us that this is just a snapshot of what it was of August 2008.

D4) Paul was hoping to send out a message to all major administrative departments asking them to do what Dan has done. How do we distribute this? We will need to give them 3 to 4 weeks. Paul will bring this up as part of his report at the CDS meeting on 2/2/09. Then we can write up a request to Data Stewards asking for them to do this exercise. The goal would be to go through this process, and then remind departments of what they should and shouldn't keep.

D5) Dan thinks that we might even have a disposal schedule.