

# Carleton University Retention Schedule

## Section 8

### INFORMATION GOVERNANCE

Records and data in this category document information and technology management, information, and cultural assets of the university. Includes retention scheduling of access and privacy records, archives, library materials, as well as administration of enterprise applications and technology infrastructure.

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### CORPORATE RECORDS AND ARCHIVES

## Retention Schedule Instructions

Rule No.	Rule Name	SECTION NAME	Implementation Date
<b>Description</b> Description of administrative or operational functions and their key records. Units should contact Corporate Records and Archives if there is concern that the retention rule does not include their records under the function.			
<b>Office of Primary Responsibility</b> Identifies the department, unit, or position that has ultimate responsibility for the creation, management, retention, and disposition of the records covered under the rule.			
<b>Retention Summary</b> Summary of the length of time you must retain records in this rule after it is no longer active.			
<b>Final Disposition</b> How to dispose of the records once the retention period is finished – Archival Review ( <b>AR</b> ), Destruction ( <b>D</b> ), or Transfer to Corporate Archives ( <b>P</b> ). The key at the bottom of this page is on every rule in CURS.			
<b>Retention Rationale</b> Explanation for why the retention and disposition is set as it is. Often due to operations but can also include reference to university policy, legislation, or industry requirements.			
<b>Filing Notes/Location</b> Additional instructions for retention or disposition or instructions on handling edge cases in the records covered by the rule.			
<b>Secondary Copies</b> Instructions for record holders who are <b>not</b> the Office of Primary Responsibility.			
<b>Special Instructions</b> <i>Digitization:</i> Any instructions related to the digitization of hard copy records. <i>See also:</i> Pointers to other rules that might be similar/more appropriate for your use.			

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records relating to the establishment of departmental or inter-departmental policies, procedures, or standards managing information assets, technology, and information governance and services such as privacy, records management, archives, reference, and research. Records may include policy proposals, research papers, consultations, reports, final policy documents, operating procedures, and administrative practices.

For university-wide policies of the Board of Governors or Senate, please refer to the Governance section of the *Carleton University Retention Schedule*.

**Office of Primary Responsibility**

Designated unit creating policy, procedure or standard.

**Retention Summary**

Retain in unit minimum 5 years after superseded or date obsolete.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

--

**Secondary Copies**

Transitory. Retain only as needed for reference or convenience.

**Special Instructions**

Digitization: --

See also: *University Policies, Procedures and Standards* – **GOV-00**

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records include reports as well as the supporting documentation and statistics created or used to produce reports related to information assets, technology and information governance and services. Does not include external reports and statistics used as reference.

**Office of Primary Responsibility**

Designated unit responsible for creation of report.

**Retention Summary**

Retain in unit for 10 years from creation of report or statistics.

**Final Disposition**

AR / D. Corporate Records and Archives may select final reports of major projects for permanent preservation.

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

The Office of Institutional Research and Planning (OIRP) is responsible for the retention and disposition of original data and records supporting that data. Any reports prepared by OIRP on the request of other units are the retention responsibility of the requesting unit.

Units may designate the destruction of raw data once reports are created if not needed for long-term operations or to support said reports.

**Secondary Copies**

Transitory. Retain only as needed for reference or convenience.

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records made, received, or used by units in support of programs, functions, activities, and operations dealing with the university's information assets, services, and technology. Records may include correspondence, memoranda, and organizational charts, delegation of authority, studies, forms, transaction records, work orders, manuals, briefings, and issue notes.

**Office of Primary Responsibility**

Designated unit.

**Retention Summary**

Retain in unit for 7 years from completion of project.

**Final Disposition**

AR / D. Records of major projects (e.g. construction) should be reviewed by Corporate Records and Archives prior to destruction.

**Retention Rationale**

Retention based on anticipated operational need.

**Filing Notes/Location**

Units may discuss and document an alternative retention length for operational project management records in consultation with Corporate Records and Archives. Contact Corporate Records and Archives for more information.

**Secondary Copies**

Transitory. Retain only as needed for reference or convenience.

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records documenting the proceedings and actions of departmental or inter-departmental standing or ad hoc committees tasked with information and technology governance, including information assets, records and data management, privacy and access to information, technology services and assets.

For committees under the Board of Governors or university Senate, please refer to the Governance sections of the *Carleton University Retention Schedule*.

**Office of Primary Responsibility**

Unit designated as responsible for committee, working group, or task force.

**Retention Summary**

Retain in unit responsible for minimum 3 years.

**Final Disposition**

AR

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

Corporate Records and Archives can establish a specific retention schedule for administrative and operational committees and working groups after consulting with the unit responsible. Contact Corporate Records and Archives for more information.

**Secondary Copies**

Transitory. Retain only as needed for reference or convenience.

**Special Instructions**

Digitization: Paper records can be replaced by digitized versions.

See also: For, *Senate Library Committee* – **GOV-08**  
For, *Collections Committee* – **INF-03-CRR-01**

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Committee records and reports documenting the work of the Collections Committee, MacOdrum Library.

**Office of Primary Responsibility**

Collections and Assessment (MacOdrum Library)

**Retention Summary**

Retain in unit for minimum 10 years from last action.

**Final Disposition**

AR

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

Unit may designate the destruction of raw data used in reports earlier than 10 years if not required to support ongoing or future operations.

**Secondary Copies**

Transitory. Retain only as needed for reference or convenience.

**Special Instructions**

Digitization: Paper records can be replaced by digitized versions.

See also: For, *Senate Committees* – **GOV-08**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Consists of records relating to access to information request made under the Freedom of Information and Protection of Privacy Act (FIPPA) and complaints regarding privacy breaches. Records may include access request forms, acknowledgement letters, third party notices, fee estimates, access recommendations, record search worksheets, research agreements, notice and confirmation of appeal and written representations.

**Office of Primary Responsibility**

Office of the General Counsel – Privacy Office

**Retention Summary**

Retain formal requests in office for 5 years from last action.  
Retain informal requests for general information for 1 year from request.

**Final Disposition**

D

**Retention Rationale**

Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. F. 31, regulation 459  
Retention based on current operational use.

**Filing Notes/Location**

--

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: For *Legal Opinions*, see: **ADM-10**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.



INF-05

Archives

INFORMATION GOVERNANCE

2024-05

### Description

Records and other cultural materials in the control of the university's two archive repositories and that have been appraised as historically significant and accessioned into formal collections.

### Office of Primary Responsibility

Corporate Records and Archives (University Secretariat)  
Archives and Special Collections (MacOdrum Library)

### Retention Summary

Preserve indefinitely in repositories.

### Final Disposition

P

### Retention Rationale

Materials have enduring value for the university.

### Filing Notes/Location

Corporate archival materials in digital format are currently preserved in the Digital Archives Vault (Permafrost system).

### Secondary Copies

Digitized copies of archival materials in the possession of secondary departments are transitory. Retain only as required for projects and then destroy.

### Special Instructions

Digitization: Original hard copy archival formats cannot be replaced by digitized copies.

See also: For donor agreements and appraisals, see **INF-13** (Acquisitions – Art, Archives, and Special Collections).

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records relating to the provision of printing and digitizing services. Records may include work orders, inventories, and correspondence.

**Office of Primary Responsibility**

Unit requesting service.  
Carleton University Print Shop

**Retention Summary**

1 years from completion of service.

**Final Disposition**

D

**Retention Rationale**

Retention based on current operational use.

**Filing Notes/Location**

--

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

INF-07

Hardware

INFORMATION GOVERNANCE

2024-05

**Description**

Consists of records relating to maintenance and repairs of computing equipment and supplies, including all desktops, laptops, and their peripherals. Records may include user guidelines, operation manuals, maintenance and repair logbooks, warranties, maintenance contracts, and service agreements.

**Office of Primary Responsibility**

Designated unit

**Retention Summary**

Retain in unit for minimum 1 year after disposal of asset.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: For *Contracts or Agreements*, see: **ADM-05**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records relating to the management of library, archival, or gallery holdings including accessioning and cataloguing, weeding and appraisal, arrangement and description, preservation management, space planning, and bibliographic control. Records may include cataloguing and description standards, project documentation, inventory lists of resources, guides, and vendor documentation.

**Office of Primary Responsibility**

MacOdrum Library  
Corporate Records and Archives  
Carleton University Art Gallery  
Units with resource centres

**Retention Summary**

Retain in unit for minimum of 2 years from last action/superseded, unless records support contracts and agreements that meet the threshold for Contracts and Agreements as stated in ADM-01 and the Carleton University Signing Authorities Policy.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.  
Carleton University Signing Authorities Policy

**Filing Notes/Location**

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: *Contracts and Agreements* – **ADM-05**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records relating to the records and information management of university information assets. Records may include records classifications, retention schedules, policies and guidelines, records management departmental advising records.

**Office of Primary Responsibility**

Corporate Records and Archives

**Retention Summary**

Retain in unit for minimum of 3 years from last action or information superseded.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location****Secondary Copies**

Transitory. Units that have received records management advising should retain records of that advising for reference only or as long as it is operationally required.

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records relating to applications that facilitate the operational and supporting process of the university. These are large-scale university-wide applications that may be developed in-house or in conjunction with vendors. Examples include finance, human resources, payroll, course management, classroom equipment booking, library catalogue, archival databases, parking and environmental controls. Records may include project charters, service level agreements, and sign-off documents.

**Office of Primary Responsibility**

Responsible unit

**Retention Summary**

Retain in unit minimum 3 years after disposal of asset.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

Units decommissioning or migrating systems should consult with Corporate Records and Archives prior to the disposal of the old system to ensure retention and disposition requirements of records or data in systems is met.

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**INF-11    Telecommunications & Networks    INFORMATION GOVERNANCE    2024-05**

**Description**

Consists of records relating to networked and telecommunication systems. Records may include project charters, specifications, system architecture, and sign-off documentation.

**Office of Primary Responsibility**

Information Technology Services

**Retention Summary**

Retain in unit for minimum 3 years from disposal of asset.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

--

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: For, *Contracts and Agreements* – **ADM-05**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to the acquisition of print or electronic library resources, including serials, monographs, web-based resources, databases, and audio-visual materials. Records may include subscription documentation and notices, memoranda of agreements, contracts, correspondence of significance, and ownership, permissions, and copyright documentation. Includes records held by both the university library and resources centres (libraries, reading rooms, audio-visual collections) located in academic departments.

Does not include contracts that meet the threshold set for major agreements in the Carleton University Signing Authorities Policy, see: *Contracts and Agreements*, ADM-01.

**Office of Primary Responsibility**

MacOdrum Library  
Units with resource centres

**Retention Summary**

Retain in unit for minimum 7 years from last action.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

--

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: For, *Contracts and Agreements* – **ADM-05**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.



**Description**

Records related to the acquisition of archival and special collections materials. Records may include sale documentation, copyright and permissions documentation, donor agreements, correspondence, research, appraisal reports, and documentation and tax records related to movable cultural property designations.

**Office of Primary Responsibility**

MacOdrum Library  
Corporate Records and Archives (University Secretariat)  
Carleton University Art Gallery  
Department of University Advancement

**Retention Summary**

Units in possession of archives and special collections acquisition records may request permanent storage with Corporate Records and Archives on these records are no longer needed for immediate operational use.

**Final Disposition**

P

**Retention Rationale**

Retention based on anticipated operational use.  
Cultural Property Export and Import Act, R.S.C., c. C-51, s. 4 (2)

**Filing Notes/Location**

The T871 tax certificate that is issued for successful certified Canadian cultural property is valid for up to 5 years after the year of donation. It is advised that any supporting documentation for appraisal, appraiser correspondence and notes be retained with the acquisition file in unit for minimum of 5 years after fiscal year of finalized tax certificate issuance.

**Secondary Copies**

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**Special Instructions**

Digitization: --

See also: For, *Acquisitions (Library and Resource Centres)* – **INF-13**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

### Description

Records related to the delivery of reference and research services for the Carleton community, including students, faculty, staff, alumni, and the public. May include correspondence, documentation of searches and search results, transitory scans or reproductions, researcher forms and agreements, and notes.

### Office of Primary Responsibility

MacOdrum Library  
Corporate Records and Archives

### Retention Summary

Retain in unit for minimum 2 years from last action. Destroy when no longer operationally required after the minimum 2 years. Operational need to be determined by unit responsible for records.

### Final Disposition

D

### Retention Rationale

--

### Filing Notes/Location

Departments may consider centralizing and/or creating aggregate reports of research and reference support, especially after two period where the information may still be required for regular operations.

Major research projects may also fall under Projects and Project Management, see INF-02 or contact Corporate Records and Archives for clarification.

### Secondary Copies

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### Special Instructions

Digitization: --

See also: For, *Projects and Project Management* – **INF-02**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to copyright and usage agreements for information assets belonging to Carleton University. Includes correspondence, risk evaluations of asset use, accompanying research and documentation, and the executed copyright and/or usage agreements.

**Office of Primary Responsibility**

Corporate Records and Archives (University Secretariat)

**Retention Summary**

Retain in unit for 10 years after execution of agreement.

**Final Disposition**

AR / D – Agreements covering copyright permissions may be selected for permanent preservation in Corporate Records and Archives depending on the use of the material requested. Other use agreements will be appraised for destruction.

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

--

**Secondary Copies**

--

**Special Instructions**

Digitization: Hard copy Copyright Permissions agreements may be replaced by digitized copies.

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to customer service support and training for information technology, systems, and hardware. Records may include customer service requests and inquiries, correspondence, minor incident, and other reports.

**Office of Primary Responsibility**

Information Technology Services  
Library Technology Services  
Technology support staff in administrative or academic units

**Retention Summary**

Retain in unit for minimum of 2 years from resolution of support request.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

Support requests and minor incident reports may be retained longer than 2 years in order to maintain a pool or database of requests. This information should be retained in a Carleton supported software.

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: For, *Information Technology Security Incident Reports - INF-17*.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to major security threats, breaches, and incidents involving the university's information technology infrastructure, assets, and user community. Records may include original support requests or incident reports, PCI compliance reporting, correspondence, workflows, and documentation of responses to incident, evidentiary documentation, and reporting. Includes records collected during investigations of email harassment.

**Office of Primary Responsibility**

Information Technology Services

**Retention Summary**

Retain in unit for minimum 10 years from resolution of incident.

**Final Disposition**

AR. Office of Primary Responsibility or Corporate Records and Archives may extend the retention period beyond 10 years for operational use or appraise records for either permanent preservation in the Corporate Archives or destruction.

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

--

**Secondary Copies**

Major incidents may also result in record creation and collection in Campus Safety Services and the Privacy Office.

**Special Instructions**

Digitization: --

See also: For, *Information Technology and Systems Support* – **INF-16**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to the circulation of library materials including borrowing and return of regular collections, management of reserve materials, management of interlibrary loans, and administration of lost or damaged library materials.

**Office of Primary Responsibility**

MacOdrum Library  
Units with resource centres

**Retention Summary**

Retain in unit for minimum 2 years after last action or until records are superseded.

**Final Disposition**

D

**Retention Rationale**

Retention based on anticipated operational use.

**Filing Notes/Location**

--

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to user profiles, use, and requests history of MacOdrum Library. May include notes and attached documentation, basic biographical and contact information, loan and inter-library loan information attached to user accounts, invoices and fines information, and correspondence.

**Office of Primary Responsibility**

MacOdrum Library

**Retention Summary**

Retention based on user profile type and active status within library systems.

Users external to Carleton University – Retain 2 years after expiration of account.

Users internal to Carleton University (students, faculty, staff, alumni) – Retain indefinitely with regular review or major changes to Library systems.

**Final Disposition**

Users external to Carleton University - D

Users internal to Carleton University - Indefinite

**Retention Rationale**

Retention based on current and anticipated operational use.

**Filing Notes/Location**

Current user accounts are managed through the Alma system. Non-current user accounts records may also exist in operational files of Library staff.

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: --

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

INF-20

Course Materials &  
Resource Sharing

INFORMATION GOVERNANCE

2024-05

### Description

Records related to course reserves, resource sharing, and interlibrary loans. May include invoices, notes and records on decisions regarding copyright, licensing documentation, vendor information, rightsholder documentation, course outlines and accompanying documentation, and correspondence.

### Office of Primary Responsibility

MacOdrum Library

### Retention Summary

Retain under direction of Access Services for 7 years from creation.

### Final Disposition

D

### Retention Rationale

Retention based on current operational use.

### Filing Notes/Location

Records under this rule may be contained within email, network drive, Jira, and course reserves management system.

Records for reserves are automatically removed and no longer visible to students at the end of each term.

### Secondary Copies

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### Special Instructions

Digitization: --

See also: For *Library Accessibility Services*, see: **INF-21**.  
For *Alternate Formats*, see: **INF-22**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.



**Description**

Records related to the management of accommodation requests and actions to support the accessibility to resources and services of all library users. Records may include referral notifications and correspondence from the Paul Menton Centre, forms and correspondence from library users self-declaring a need for accommodations, and accompanying documentation as required.

**Office of Primary Responsibility**

MacOdrum Library

**Retention Summary**

Retain under direction of Access Services for 5 years from inactive status of library user.

**Final Disposition**

D

**Retention Rationale**

Retention based on current operational use.

**Filing Notes/Location**

Inactive status should be confirmed prior to deletion of records.

**Secondary Copies**

--

**Special Instructions**

Digitization: --

See also: For *Alternate Formats*, see: **INF-22**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.

**Description**

Records related to publications and resources requested for alternate formats for accommodation requirements. May include invoices, notes, and records on decisions regarding copyright, licensing documentation, course outlines and accompanying documentation, patron information, and correspondence.

**Office of Primary Responsibility**

MacOdrum Library

**Retention Summary**

Retain under direction of Access Services for 7 years from creation.

**Final Disposition**

D

**Retention Rationale**

Retention based on current operational use.

**Filing Notes/Location**

Records under this rule may be contained within email, network drive and Jira.

Alternative formats are automatically rendered no longer visible to students at the end of each term.

**Secondary Copies**

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**Special Instructions**

Digitization: --

See also: For *Library Accessibility Services*, see: **INF-21**.

**AR** = Corporate Records & Archives must review.

**D** = Secure Destruction/Deletion.

**P** = Permanent. Transfer to Corporate Archives.

**Secondary Copies** = Any copies of records that are in the custody of a department or unit that is **not** the Office of Primary Responsibility.