



## How long do I keep records?

In order to manage records effectively, it is important to keep valuable records for as long as they are needed – even permanently if they have enduring research value – while removing obsolete or superseded information and documents as quickly as possible.

Not all documents or records created in the course of UN work need to be kept permanently. Some records need to be kept for years, as evidence of official actions or decisions, but others are only useful for months, weeks, days, or even hours. To determine how long to keep records and documents, the first task is to distinguish between non-records (information and documents) and records (documents that are formally declared as evidence), as highlighted below.

### Non-records

**Information:** “data, ideas, thoughts, or memories irrespective of medium.” Information sources are “non-records”: they are useful but do not provide evidence. Examples include journals, newspapers, publications, or reference sources not created by the UN.

**Documents:** “any recorded information or objects that can be treated as individual units.” Examples include works in progress such as draft communications or “to do” lists and transitory records such as emails confirming a meeting or acknowledging receipt of a document.

### Records

**Records:** “information created, received, and maintained as evidence and information by an organization or person, in pursuance of legal obligations or in the transaction of business.” Examples include final reports, emails confirming an action or decision, spreadsheets showing budget figures, photographs or maps of field missions, or other records that must be kept for as long as needed as evidence.

Once you have distinguished between information, documents, and records, the next task is to decide if you need to keep a document or if you can destroy it once it is no longer needed.

If you receive a document for **reference** only and another office within the UN is responsible for keeping that record, then you have a convenience copy. The Office of Record is responsible for keeping the official copy of that record; you should destroy your copy as soon as you no longer need it.

If you create several drafts of a document, such as when you are writing a report or plan, the drafts are **works in progress**. If a superseded work in progress is not needed later as evidence, it should be destroyed. But if the draft document provides evidence, it should be “declared” a record and kept for as long as needed.

If you create or receive a document and use it only for a very short time, such as to complete a routine action or draft a subsequent document, that **transitory record** should be destroyed when you no longer need it.

If you created or received the item in the course of your work, and it provides evidence of an activity, decision, or transaction, you need to keep it for as long as needed as evidence, whether for a week, a year, or a decade. Decisions about retention are made by senior officials in your office in consultation with UN ARMS. The final decisions are documented in official **records retention schedules**, which every office should have in place.

## The importance of retention schedules

The decision about which records to keep and for how long is made by offices in consultation with records specialists at the UN's Archives and Records Management Section or UN ARMS. Records retention schedules identify: (1) the Office of Record for different categories of record, (2) the number of years that different records should be kept in the office (the active phase), (3) how long they need to remain available to the office (the semi-active/inactive phase), and (4) whether they should be transferred to UN ARMS for preservation as archives or destroyed because they have no further value.

Retention schedules apply to both paper and electronic records. Electronic records are not normally transferred out of electronic record-keeping systems when they become semi-active or inactive; they are usually transferred when they become archival. However, electronic records still need to be identified according to retention schedules so that they can be managed according to established retention periods. UN ARMS can offer help in applying retention schedules for electronic records.

To ensure valuable records are safe and superseded records are removed from records systems, ask yourself the questions below whenever you create or receive a document as part of your UN work.

### Is the document an official UN record?

- Does it document an UN business activity?
- Does it provide evidence of UN accountability?
- Is it needed to protect the interests or rights of the UN?
- Does it relate to the function or mandate of your office?

**NO**

**DESTROY THE DOCUMENT AS SOON AS YOU NO LONGER NEED IT.**

**YES**

### Are you the person who should keep that record?

- Are you the creator of the document?
- Are you the primary recipient of the document, if it came from a source outside your office?
- Is your office the Office of Record for work related to the document in question?
- Are you the person in your office responsible for managing this type of document?

**NO**

**DESTROY THE DOCUMENT AS SOON AS YOU NO LONGER NEED IT.**

**YES**

**"DECLARE" THE DOCUMENT TO BE A RECORD BY STORING IT YOUR OFFICE'S OFFICIAL RECORDS SYSTEM.**

**Remember...** Keeping obsolete or superseded documents is as hazardous as not keeping valuable records. Effective records management depends on cleaning records systems regularly, according to established retention schedules. Consult UN ARMS for guidance on developing or applying retention schedules.



**To understand when and how to destroy records, see Record and Information Management Guidance Sheet number 5. To understand how to ensure records are secure, see Record and Information Management Guidance Sheet number 6.**