

THIRD PARTY SOFTWARE BEST PRACTICES



RECORDS RETENTION

Records must be maintained in accordance with a legally approved University Records Retention Schedule



USABILITY

Ensuring easy identification and retrieval of records, and allowing deletion/purging of records past retention



PRIVACY & SECURITY

Service provider must meet all the relevant information privacy and security requirements



ACCOUNT MANAGEMENT

Defining and controlling access to records



IMPLEMENTATION

Approving and standardizing use throughout the department



CONTRACT NEGOTIATION

Documenting important vendor obligations within the contract with the cloud provider



RECOVERY

Mitigate disruptions with frequent backups and creating standard operating procedures for events that may diminish services

Per WAC 434-615-020, University offices and departments can use cloud applications to store university records provided that the records are managed properly. Managing records properly includes the ability to respond to audits, public records requests, and litigation, retain records for their full retention period, and delete records at the end of their retention period.

Storing records with an outside vendor does not absolve UW employees from the responsibility for proper retention and management of the records.

UW Records Management Services is here to help you maintain compliance with records and information governance principles. Contact us at recmgt@uw.edu.

REPOSITORIES

File storage + sharing applications that store files you have created outside of the cloud. Files can be accessed by you and/or others via the Internet.

e.g. OneDrive, Google Drive, Dropbox

TOOLS

Productivity tools you use to create unique types of records and store them within the application itself.

e.g. Trello, Slack, Jira

HYBRIDS

Software as a Service (SAAS) databases and other structured content systems that store their information in the cloud.

e.g. Workday, Salesforce