

rev 0:

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Ensuring document security and retrieval

Overview

Property Information storage is broadly divided into:

- Building Technical Records.
- Project Filing.
- Technical Reference Material.
- Trade Literature.
- Statutory and other records.

Building Technical Records

Are set out in a standard structure across all buildings comprising the estate, and:

1. Consist of accumulated information from completed projects
2. Include all types of written and drawn documents including legal contracts and important certification
3. Are kept in the P&F basement document store and controlled by the Property Technical Records Manager.

Guidance is given in the Property Standard: "[Project Handover Record Information](#)"

Project Filing

Consists of all information required to manage the project from inception to closeout, including much day to day information (eg correspondence) which is not required as part of the permanent Building Technical Records. Project Filing is managed by the P&F Responsible Manager and P&F Central Admin Team and is:

1. Governed by a common approach set out in the Property Standard "[Project Filing Structure](#)."
2. Kept in designated areas of the P&F office (while live).
3. Stored in the P&F basement document store when the project is closed.
4. Archived (boxed) in the P&F basement document store after *** years.
5. Destroyed after *** years.

Technical Reference Material

Includes Standards, guidance etc from all sources and is kept centrally within the P&F office for ease of reference and to ensure it is available to the widest readership.

Technical Reference Material is kept up to date and controlled by the Technical Records Manager.

Trade Literature

Includes all other information from third party sources including unsuccessful tenders (boxed and catalogued). Kept in the P&F basement document store except for that of immediate use in projects (retained by the Responsible Manager), where it is managed by the Technical Records Manager

Statutory and other records

Maintenance records are held by the CU Term Maintenance Contractor.

Other records (eg water testing results, Fire Certification etc) are held in the P&F office under the management of the P&F Responsible Manager and the Technical Records Manager.

Basement shelving proposal

Each shelving unit has 3 x 6 = 18 sections

Shelving units labelled A – H to be reserved for Property use; each section being numbered (and labelled) A1, A2 ... to A18 starting from the top left when facing the shelving unit.

A1	A2	A3
A4	A5	
		A18

Shelving units A – D are reserved for Building Technical Records

Shelving units E – G are reserved for Project Filing (closed projects)

Shelving unit H is reserved for all other (trade literature etc) filing

Building Technical Records

Specific sections are reserved in advance for each building as in the attached diagram.

This is based on an estimated future requirement but may change, therefore additional spare capacity is identified for each shelving unit to avoid re-filing all units.

Each Building Technical Record is subdivided into 10 sections (see the Property Standard "Project Handover Technical Record Information"), however it is unlikely that documentation prepared under previous systems will be re-filed *for some buildings*.

Initially it is expected that a number of sections are sparsely populated, due to the lack of Property records.

Project Filing (closed projects)

Closed projects are to be filed in the next available section (or part) of each shelving unit starting with E1, E2 etc. This is because it is not possible to accurately predict when the sequence of project closure or the amount of material to be filed.

The key to this approach is accurate indexing. Each entry must be logged into a spreadsheet with the following information:

Filing location (start)	Project code	Project name	Date closed	Archive date	Destroy date
A2	46****pl	Saddlers Boiler Project			

Note: Project code is the CU finance code; Project name is NOT just the Building Name

The spreadsheet, sorted by both Filing location and Project code, is to be printed/laminated and available for inspection at the shelving units.

Shelving units E & F are reserved for capital ('pc' code) projects; G is reserved for LTM ('pl' code) projects.