



ERP (Colleague) Directory Retention Policy

Policy:	No: 5.0
Responsible Officer:	Chief Information Officer, James Johnson
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Issued By:	ITS - Information Technology Services

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1.0 Purpose

This policy defines the retention schedules for various directories used by SMC's ERP system, Colleague, to ensure systematic data management, efficient storage, and compliance with best practices. In this instance a Directory is defined as a folder on a server where Colleague related files are stored. Each directory serves a specific purpose:

***_HOLD_* Directory:** The default repository for files generated by Colleague processes.

***_PH_* Directory:** Repository of Log files of background Unidata processes.

SAVEDLIST Directory: Repository of Colleague savedlists

Archive Directory: Secondary repository for files moved from other directories, providing an extended retention period.

2.0 Accountability

The SMC IT Department is responsible for managing and enforcing this policy. Administrative Information Services (AIS) will oversee file management, retention, and archival processes for the *HOLD*, *PH*, SAVEDLIST, and Archive directories.

3.0 Applicability

This policy applies to all departments and users involved in Colleague ERP processes.

4.0 Retention Timelines

a. *HOLD*, *PH*, and SAVEDLIST Directories

1. **Purpose:** Serve as default storage locations for documents, logs, and lists created by Colleague processes.
2. **Retention Period:** Files in each of these directories will be retained for **90 days**.
3. **Post-Retention Action:** After 90 days, files will be transferred to the Archive Directory.

b. Archive Directory

1. **Purpose:** Provides extended storage for files transferred from *HOLD*, *PH*, and SAVEDLIST directories.
2. **Retention Period:** Files in the Archive Directory will be retained for **1 year** from the date of transfer.
3. **Final Action:** After 1 year in the Archive Directory, **files will be permanently deleted**.

- i. *If your department requires a file in the Archive Directory, please submit a ticket to ais@stmarys-ca.edu

5.0 Policy

- a. **Storage Duration:** Files in the *HOLD*, *PH*, and *SAVEDLIST* directories are retained for 90 days, after which they are moved to the Archive Directory. Files in the Archive Directory are retained for an additional 1 year from the date of transfer before permanent deletion.
 - i. Files and savedlists that start with "XSMC" are exempt from this policy
- b. **File Management:** AIS will implement automated processes to handle file transfers from *HOLD*, *PH*, and *SAVEDLIST* to the Archive Directory, ensuring timely deletions from all directories.
- c. **Monitoring and Audits:** Periodic reviews will be conducted to ensure compliance with retention schedules and identify any files that require immediate archiving or deletion.

6.0 Compliance

Failure to adhere to this retention policy may result in storage inefficiencies and potential data management issues.

7.0 Contact Information

For questions or assistance regarding the ERP (Colleague) Directory Retention Policy, please contact: AIS - ais@stmarys-ca.edu

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8.0 Revision History

This standard shall be subject to periodic review to ensure relevancy.

Date	Description of Change	Reviewer
11/5/2024	Draft	Hailey Yaffee
2/5/2025	Published	Adriana Botello
2/12/2025	Edited - added note to V. A. 1.	Hailey Yaffee