

Example Classification Structure

Finance and Accounting

Accounting Management

Accounts Payable

Check Requests [Year]

Expense Reports [Year] [Employee]

Invoices [Year] [Vendor]

Credit Card Statements [Year] [Employee]

Accounts Receivable

Credit and Collections [Completion]

Statements [Year] [Customer]

Budget Management

Approved [Year]

Development and Preparation [Year]

Procurement Administration

Bids and Proposals [Project] [Close/Completion Date]

Catalogs and Pricing

Purchase Orders and Requisitions [Number] [Project] [Close/Completion Date]

Vendors, Contractors and Suppliers [Name] [Close/Completion Date]

Governance and Compliance

Audit Management

External

Financial [Year]

Internal

Business and Strategic Planning

Departmental

Organizational

Committee and Meeting Management

Meetings and Briefings –

External [Type] Meetings

Internal Departmental

Policy, Procedure and Standards Management

Guidelines and Manuals [Title] [Superseded Date]

Policies [Policy Number] [Superseded Date]

Procedures [Title] [Superseded Date]

Signing Authorizations [Title] [Superseded Date]

Standards and Regulations [Title] [Superseded Date]

Human Resources

Employee Development

Performance Appraisals and Objectives [Year] [Employee ID/Name]

Performance Goals and Review [Year] [Employee ID/Name]

Personnel Administration

Personnel Files [Employee ID/Name] [Term Date]

Time and Attendance

Work Schedules and Assignments

Staffing and Recruiting Administration

Job Descriptions [Position Name] [Superseded Date]

Recruitment and Selection

Applications - Not Hired [Year]

Campaigns [Year]

Legal

Contract Management

Goods and Services [Contract Number] [Expiration Date]

Employment [Employee ID/Name] [Term Date]

Records Governance

Classification Scheme [Superseded Date]

Disposition Destruction Approvals and Certificates

Inventories and Surveys Offsite

Legal Hold [Case Name] [End Date]

Public Records Requests [Request Number] [Year]

Retention Schedule [Superseded Date]

Risk, Safety and Security

Insurance

Policies [Expiration Date]

Safety and Security Management

Emergency Management

Continuity of Operations

Plans, Safety