

**Record Retention  
Budget and Analysis - University**

<b>Duke University Record</b>	<b>Medium</b>	<b>Minimum Retention Period</b>
Budget documentation	Pillar	FY + 9 years
	Essbase	FY + 9 years
	Excel schedules	FY + 5 years
	Paper (depart.)	FY + 5 years
Budget modification documentation	Pillar	FY + 5 years
	Essbase	FY + 5 years
	Excel schedules	FY + 5 years
	Paper (original)	FY + 5 years
Forecast documentation	Essbase	FY + 5 years
	Paper (original)	FY + 5 years
	Excel schedules	FY + 5 years
Year-end projection documentation	Pillar files	FY + 5 years
	Essbase	FY + 5 years
	Excel schedules	FY + 5 years
	Paper (original)	FY + 5 years
Year-end closing documentation	SAP R/3	FY + 5 years
	Excel schedules	FY + 5 years
	Paper (original)	FY + 5 years

**Legend for Minimum Retention Period Entries**

- ACT: While active or employed
- CY: Current fiscal year
- CL: Calendar year of the report/file, etc
- Dept: A matter of departmental policy
- FY: Fiscal year of the report /file, etc.
- Perm: Permanent record unless superceded
- Term: Termination of employment