

## Inventory/Transfer Forms

**Records Management**  
University of Cincinnati

Simplified Records  
Inventory Form

Administrative Area	Division
Department	Office
Records Officer	Phone
Inventory Completed By	Inventory Date

*\*For the Description Field - Include any unique information about the records, such as originating office, format (electronic or paper), volume, inclusive dates, how the record is used – i.e. as reference only for a specific amount of time, working papers to compile reports, etc.*

Accounting/Financial	Description
Audit Records	
Bookstore Requisitions	
Central Stores Orders	
Departmental Budget Ledgers	
Invoices	
Purchase Orders	
Small Order Forms	
Sundries	
Telephone Records	
Travel Authorizations/Expense Reports	

**UNIVERSITY OF CINCINNATI: Simplified Records Inventory Form**

[http://www.libraries.uc.edu/libraries/arb/records\\_management/FormsDownloads.html](http://www.libraries.uc.edu/libraries/arb/records_management/FormsDownloads.html)

University of Cincinnati Records Management

<b>Administrative Records</b>	<b>Description</b>
Accreditation Files	
Committees	
Correspondence (Executive, General, Email)	
Reports	
Subject Files	

<b>Legal</b>	<b>Description</b>
Compliance	
Contracts and Agreements	
Grants	
Grievances	
Licensing	

<b>Personnel – Staff, Student, and Faculty</b>	<b>Description</b>
PAFs	
Payroll	
Resumes/Search Files/Applications	
Evaluations, RPT	

**UNIVERSITY OF CINCINNATI: Simplified Records Inventory Form**

[http://www.libraries.uc.edu/libraries/arb/records\\_management/FormsDownloads.html](http://www.libraries.uc.edu/libraries/arb/records_management/FormsDownloads.html)

University of Cincinnati Records Management

<b>Publications</b>	<b>Description</b>
Non-UC and UC produced	
Newsletters	
Equipment Manuals	
Photographs	
Web Page	

<b>Student Records</b>	<b>Description</b>
Class Lists	
Grades	
Transcripts	
Grade Change Forms	
Student Loans/Scholarships/Financial Aid Awards	

The above are suggested Records Series Titles. Your area may have additional titles that do not appear on the above listing. Please add additional listings in the spaces provided below and/or on a separate page.

<b>Record Series Title</b>	<b>Description of Records</b>

# Records Management

University of Cincinnati

## Standard Records Inventory Form

<b>Administrative Area</b>	<b>Division</b>
<b>Department</b>	<b>Office</b>
<b>Records Officer</b>	<b>Phone</b>
<b>Inventory Completed By</b>	<b>Inventory Date</b>

**Records Series Title:**

**Description of Series:**

<b>Inclusive Dates</b>	<b>Are records still created?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Volume</b>	<b>Annual Accumulation</b>
<b>Filing Method/Arrangement</b>	<b>Storage Method</b>	<b>Purpose of Record</b>	
<b>Media Format(s) – list all that apply and specify sizes</b> <input type="checkbox"/> Paper <input type="checkbox"/> Electronic <input type="checkbox"/> Microform <input type="checkbox"/> Other:			
<b>Audited?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Confidential?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Vital?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>By:</b>			

### For Records Management Use

<b>Retention Period and Justification</b>	<b>Comments</b>
<b>Archival material?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>IUC Group</b>

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LIBRARIES

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# University Archives

In the Rare Book, Manuscript, and Special Collections Library

- About the Archives
- Visit the Archives
- Finding materials
- Subject guides
- Duke history
- Digital Collections
- FAQs
- Exhibits
- DukeSpace
- Links
- Ask Archives

[RBMSCL](#) / [University Archives](#) / [About](#) / [Records Management](#)

## Transferring Office Records to the University Archives

The University Archives is Duke's official archival agency, and is a department of Perkins Library. Our job is to identify, acquire, and preserve official University records that have enduring value for the Duke community, and to make them available in accordance with the policies of the Board of Trustees, Administration, and Faculty. Access to official records is regulated to safeguard confidentiality and privacy. Our staff will be happy to assist you in managing your office's non-current files.

### Types of Records to Transfer

What records do you not refer to often, but could not do without? Records are sent to an archive because they are of long-term value, but are not needed for day-to-day administration.

As a rule, send the University Archives the significant and unique records that were generated or received by your office. Records are usually significant and have enduring value if (for example) they document policy development and precedents, major projects, or university rights and responsibilities; if their subject matter caused considerable comment on campus or in the media; if they involved litigation or large sums of money; or, if they have been vital to the operation of your office. A general guideline is to ask what material would be of use to a person writing a report on your office or a history of your department. Consider the potential uses of archived records; for instance, grant proposals often require historical narratives and statistics.

**Materials that are appropriate for archival status include:**

- Correspondence and subject files of the Dean, Director or Chair.
- Publications, such as newsletters and annual reports.
- Records of program or curriculum development.
- Departmental minutes; committee minutes and reports.
- Self-studies, histories, and accreditation reports.
- Records about symposia and special projects.
- Records about cooperative efforts with other Institutions.
- Records about relationships with government, business, or industry.
- Photographs (if identified).
- As for what not to send, transactional records such as leave requests and purchase orders are not usually of long-term value.

The Archives does not have space for reprints, bulky artifacts, or more than two copies of reports and publications. Routine correspondence (for example, requests for course information and acknowledgments) is generally not valuable. Please don't send us your copies of the announcements, directives, and so forth that are distributed throughout the University; we get them too.

Through its Records Management Program the University Archives is developing schedules for offices to follow when they need to dispose of records. Those schedules will provide additional information about the types of records to transfer to the Archives or discard. Visit the [Records Management homepage](#) to view current records retention schedules.

Questions?
To contact the Archives about records transfers: Voice: 660-5820 Fax: 660-5987 <a href="#">Ask Archives</a> e-mail

**Special cases**

- Faculty papers: the Archives is interested in acquiring records of an official nature. These will represent work of faculty or staff committees, or they'll document extra-curricular activities such as faculty-student interaction or town-gown relations. Due to Federal privacy laws governing student records, the Archives does not keep grade books, marked papers or material that might be considered part of a student's academic record.
- Financial records: see the Duke University General Accounting Procedures for information. The Archives will retain only year-end financial statements.
- Personnel records: contact the personnel division for information on the disposition of personnel records.
- Student records: grade reports, advisors' files, and other student-identifiable materials may be considered education records subject to Federal law. These should be handled according to the procedures specified in the University Policy Manual.

**Transfer Procedure**

1. Please use the boxes we provide. We have to make efficient use of limited space, and our facilities are set up to house these containers. Boxes are free of charge for records being sent to the Archives, and can be picked up here on any weekday. Records sent in boxes other than those provided or not having prior approval will not be accepted.
  - For letter-size files, 2 file drawers will require 3 boxes
  - For legal-size files, 1 file drawer will require 2 boxes.
  - For lateral files, 1 box will hold 1¼ feet of letter-size files, or 1 foot of legal-size files.
2. If you are sending records of distinct offices, committees, or organizations, please do not intermix them. Keep the records in the order in which they were used in your office.
3. Make a list of the folder titles, with their dates (**examples**). When you need to find something, this list will be invaluable. Think of folder title lists as an index to your office's records. In the coming years, more records will be stored off-site. Accurate folder lists will become essential for retrieving files you need. Be sure to include the name of your office on the sheet, and span of years represented by the files.
4. Do not send us records in hanging files or loose-leaf binders. We will not accept them. The hangers take up space and add weight. If records are in hanging files or binders, re-folder them into manila folders. Please do not send us loose, unfolded paper. Do not use rubber bands on folders; they rot and leave stains. Leave a little wiggle room in the box; don't overstuff it.
5. Do not write on the boxes. We will put on a permanent label here. Attach a sheet of your letterhead to the box cover, with the date and name of a contact person, and label it To University Archives.
6. Deliver boxes to the loading dock at the rear of Perkins Library. The driveway beyond the Tel-Com building leads there. Please call beforehand, and if possible, someone will meet you. Offices on the main quad of West may find it easier to bring records in through the front of the Library; we can provide you with a hand truck.
7. When we've logged the records in, we'll send you a receipt. Please keep this for future reference. The accession number on it is what we use to keep track of your office's records.

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**HARGRETT**  
RARE BOOK & MANUSCRIPT LIBRARY



RECORDS  
CENTER

## UNIVERSITY OF GEORGIA RECORDS CENTER

DESTRUCTION  
OF RECORDS

### Box Transfer Form for Storage

STORAGE  
& RETENTION  
REQUIREMENTS

The boxes with asterisk (\*) must be filled. When done, press **SEND** at the bottom of the page.

(Please read guidelines for [storage of records](#) before filling out this form.)

ACCESS TO  
RECORDS

Please call if you have any questions.

ELECTRONIC  
RECORDS  
POLICY

**Name\***

RECORDS  
FORMS

**Department Name\***

Departmental  
Records Officer  
Form

**E-mail Address\***

File Retrieval  
Form

**Telephone  
Number\***

Box Transfer  
Form - Destruction

**Campus Address**

HARGRETT  
LIBRARY

**Number of Boxes  
Being Sent**

**Years of Records  
Being Sent** (e.g.  
1990-2006)

**General idea of  
content of  
BOXES** (e.g. exams,  
financial reports,  
administrative papers)

**Board of Regents  
Retention  
Schedule  
reference for type  
of document.**  
(What is the Retention  
Schedule?)

**Date boxes should  
be destroyed** (if  
there is no date for  
destruction please explain  
in the Comments/Special  
Instructions section).

**Comments/Special  
Instructions**



**Georgia Institute of Technology  
Archives and Records Management Department  
Records Transfer Memorandum**

Complete and return to the Archives and Records Management Department, Library and Information Center (mail code: 0900). Please type or print the upper portion of this form.

**1** Office of origin: \_\_\_\_\_  
Transferring records custodian: \_\_\_\_\_  
Telephone number: \_\_\_\_\_  
Campus building and room number: \_\_\_\_\_  
Date: \_\_\_\_\_

**2** Record type(s) or series:  
Only one series or record type per form. Please indicate Board of Regents' retention category.  
\_\_\_\_\_  
\_\_\_\_\_  
Number of boxes transferred: \_\_\_\_\_  
Inclusive dates of records: From \_\_\_\_\_ to \_\_\_\_\_  
Filing order of records: \_\_\_\_\_  
Has this type of record been sent before?  Yes  No  Don't know

**Records office use only below this box.**

Accession number: \_\_\_\_\_  
Transfer date: \_\_\_\_\_  
Retention number: \_\_\_\_\_  
Destruction date: \_\_\_\_\_  
Location: \_\_\_\_\_

**Departmental Transfer Form  
Permanent Materials  
University Archives and Records Program**

**Collection Name:** \_\_\_\_\_

**Accession Number:** \_\_\_\_\_

**Description of records:** \_\_\_\_\_

\_\_\_\_\_

**Received From: (Individual and /or Department):** \_\_\_\_\_

\_\_\_\_\_

**Size:** \_\_\_\_\_ **Date Span:** \_\_\_\_\_

**Arrangement:** \_\_\_\_\_

**Record Series Name and Number:** \_\_\_\_\_

**Access Restrictions:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**KUSI pick-up date:** \_\_\_\_\_ **KUSI Box Numbers:** \_\_\_\_\_

**Received by and title:** \_\_\_\_\_

**Date received:** \_\_\_\_\_

6/17/2008

**UNIVERSITY OF LOUISVILLE: Records Inventory and Transmittal**

<http://library.louisville.edu/uarc/recgmt/transmit.htm>

UNIVERSITY OF LOUISVILLE  
UNIVERSITY ARCHIVES AND RECORDS CENTER

RECORDS INVENTORY AND TRANSMITTAL

**Complete sections 1 through 7.** List the box numbers in ascending order in the column marked "box no.", below the line, and beside each box number list the titles of all folders or materials as they appear in that container. The transmittal form should contain a folder title listing for each container transferred to the University Archives and Records Center. (See "Records Transfer Procedures," available from UARC for further instructions.) Save the form as [your department name] Transmittal.doc and e-mail it to the University Archives and Records Center at [recgmt@louisville.edu](mailto:recgmt@louisville.edu). Keep a copy until you receive the completed form returned from UARC, which includes an accession number. Please refer to this accession number when you request records or information from your records in UARC.

**To Be Filled In By Archives**

Accession Number	Date Received	Total Boxes	LF
Received by:	Record Group	Location	

1. Department:
2. Address:
3. Person In Charge of Records:
4. Telephone:

- |            |                                      |  |
|------------|--------------------------------------|--|
| 5. Box No. | 6. Folder Titles/Records Description | 7. Inclusive Dates for each folder or other material |
|------------|--------------------------------------|--|

A GUIDE TO USING THE OSU LIBRARIES

# Transfer of Official Permanent Records to University Archives: An Overview

## Introduction

Special Collections and University Archives preserves university records of permanent value. Such records have continuing administrative, legal, fiscal or historical significance. By maintaining these records we can ensure that the important work done by your unit is documented for future generations.

## Related Information

- OSU Policy and Procedures Letter 3-0190 [www.okstate.edu/osu\\_per/policy\\_proced.htm](http://www.okstate.edu/osu_per/policy_proced.htm)
- Records Management Act, 67 Oklahoma Statute 205
- Consolidated Records Disposition Schedule, General and University and Colleges, [www.odl.state.ok.us/oar/recordsmgmt/grds-education.htm](http://www.odl.state.ok.us/oar/recordsmgmt/grds-education.htm)
- Oklahoma Open Records Act, 51 Oklahoma Statute Supplement, Section 24A.1 et seq [www.foioklahoma.org/OpenRecords.pdf](http://www.foioklahoma.org/OpenRecords.pdf)

## What to Send to the Archives

- Records that document the organization, function, policies, procedures, operations, and essential transactions of the unit and friends groups
- Official correspondence and memoranda
- Committee minutes
- Publications and annual or other reports issued by your unit
- Photographs (please identify before transferring)
- Machine readable records accompanied by printed documentation
- Remove CONFIDENTIAL MATERIAL from files and make arrangement for its safe storage (only records that are exempt from the Oklahoma Open Records Act)

## What You Should Keep for Your Convenience

- Personnel records
- Routine and courtesy correspondence such as: acknowledgments, announcements, confirmations, invitations, itineraries, reservations, letters of transmittal
- Material not related to the function/administration of the office:
  - General distribution memos of other offices
  - Publications of other institutions
- Departmental copies of financial records such as:
  - Monthly budget statements
  - Purchase orders
  - Receipts, vouchers, work orders
  - Salary distribution forms
- Generally, if your office does not create a record, your copies are convenience copies and may be disposed of unless they contain confidential information

Contact for information:  
Room 204  
Edmon Low Library  
Phone: (405) 744-6311  
[libscua@okstate.edu](mailto:libscua@okstate.edu)



# How to Transfer Official Records to University Archives

## Preparing your files:

- In order to correctly identify your records, consult the Consolidated General Records Disposition Schedule for State Universities and Colleges [available: <http://www.odl.state.ok.us/oar/recordsmgmt/grds-education.htm>].
- Fill out a Records Destruction/Transfer Form (attached). If you have records for destruction, place them on a separate form. Make a copy for your records. Send original to University Archives, Edmon Low Library, Room 204.
- Records Destruction/Transfer Requests are reviewed on a regular basis. Transfer requests are acted upon immediately. You should receive a response within 5 working days.
- Place records approved for transfer in file folders with descriptive labels.
- Separate and label confidential materials.
- Replace hanging file folders with traditional flat folders.
- Label each box with your office name, box number (1 of 3, 2 of 3, etc.), the name of the records series, dates covered by the records, and schedule and series number (i.e., "UC GRDS, 5-15").
- Pack records in the order in which they were kept by your office.
- Prepare a list of folder titles for each box and place in the front of Box 1.
- Call University Archives at 405-744-6311 so that we may expect your records.
- If the volume of your records warrants, call Physical Plant at 405-744-7154 to arrange for transport of your records to Room 204, Edmon Low Library.
- You will receive confirmation from the University Archives that your records have been received. At that time you will be given the accession number assigned to your records. This number is used to identify the records should you need access to them.
- When the records have been processed and a finding aid has been prepared, you will receive a copy of the finding aid via campus mail. Generally this process takes 6-36 months depending on current receipts.

**OKLAHOMA STATE UNIVERSITY: Notice of Items for Destruction or for Transfer to Archives**

<http://www.library.okstate.edu/guides/general/images/recordtransfer.pdf>

**OKLAHOMA STATE UNIVERSITY  
NOTICE OF ITEMS FOR DESTRUCTION OR FOR TRANSFER TO ARCHIVES**

- Request to destroy records**
- Request to transfer records to University Archives**

DEPARTMENT \_\_\_\_\_ DATE PREPARED \_\_\_\_\_

CONTACT PERSON \_\_\_\_\_ EXTENSION \_\_\_\_\_

Inclusive Dates	*General Records Disposition Schedule Records Series #	Item Description & Volume (cubic feet)

I hereby certify that, to the best of my knowledge, all state and federal audits have been completed and that no legal actions or investigations are pending for the above listed records.

\_\_\_\_\_  
Dean or Administrative Officer

\_\_\_\_\_  
Title

**MAIL TO:** Kay Bost  
University Archives  
Edmon Low Library – Room 204  
x47372

\* Available: <http://www.odl.state.ok.us/oar/recordsmgt/grds-education.htm>

For Office Use Only

**ACTION:**

Approved

- Destruction of Records-Suzanne Frits
- Destruction of Records-Univ. Archives
- Send to University Archives
- Department to retain until

Taken (date and initials)

- \_\_\_\_\_, \_\_\_\_\_
- \_\_\_\_\_, \_\_\_\_\_
- \_\_\_\_\_, \_\_\_\_\_
- \_\_\_\_\_, \_\_\_\_\_

Copy To: University Archives

G:\Records\DestroyTransferRequest.doc

Last revised 18 July 2005



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## Instructions for Transferring Non-Permanent Records

### Preparing records for storage

Storage is available for inactive records of departments and offices on campus. An inactive record is one that is no longer needed on a regular basis for business purposes. Inactive records storage is for non-permanent records, if you think you have a group of permanent records, contact the University Historian/Archivist at 6-1899.

Legal custody of records stored in the University Archives inactive records storage remains with the originating department and consequently access is limited to staff of that department and of the University Archives.

Please note the following:

- We no longer accept records into storage that have 3 years or less left on their retention period.
- We are unable to fulfill more than 15 file requests per month for each department.
- Do not send records in envelopes or send one or two random files at a time.
- Do not send materials which are not considered to be "record" material, such as magazines, books, newspapers, etc. which were not produced by the University of Oregon or by University of Oregon personnel.

If you are unsure about identifying these materials or you think you have a special case, please contact the Electronic Records Archivist at 6-1905.

### Step 1: Identifying and Preparing Records.

1. Before preparing boxes for transfer, review the [records retention schedule](#) to identify the records series that are to be sent.
2. Box the records with care. Please do not box multiple records series in one box. A record series is one type of record, as defined in the records retention schedule; search records would be a good example of one record series. If you are sending records from the same series with a large date span (greater than 1 year), please box the years separately. This ensures the proper and timely disposition of university records.
3. Do not remove records from the folder in which they were placed, unless they are in hanging folders. Hanging folders need to be replaced by standard file folders. Please do not overfill boxes. Overstuffed boxes pose a safety hazard and can damage the records.
4. Place records in standard records storage boxes (W=12" X L=15" X H=10") with lids and handles. If you have odd size items or records that do not fill an entire box, please contact University Archives.
5. Create a box/folder list for each box. The list needs to indicate the box number, date range of materials, record series titles from the retention schedule and folder titles.

### Step 2: Sending the Transmittal.

1. Fill out a Transmittal Form and send it **AND** a copy of the box/folder list to University Archives, Attn: Erin O'Meara. Make sure that you fill out all appropriate sections of the transmittal form and make a copy of the form and box/folder list for your records. Use only one transmittal form for each shipment of records. When describing records, please use the record series titles as indicated in the records retention schedule. This helps us process the transmittal and manage the records more efficiently.
2. Please do not allow students to sign the form or act as a contact person for the transmittal process. We are trying to develop a list of staff members on campus who have the responsibility for maintaining the records for each department.

### Step 3: Coordinating the Delivery.

1. Someone from University Archives will confirm the receipt of your transmittal request via e-mail or phone.
2. University Archives will send you a memo that describes the delivery process. Also included in the envelope will be labels to affix to the boxes. Place the labels on the front of the box (narrow side) so that it corresponds with

## UNIVERSITY OF OREGON: Instructions for Transferring Non-Permanent Records

[http://libweb.uoregon.edu/records/transmittal\\_instructions.html](http://libweb.uoregon.edu/records/transmittal_instructions.html)

the direction of the folders inside. The accession number for the transmittal is printed on each label. Please record this number on your copy of the transmittal. You will need this number if you request folders from these boxes.

Write the box number on each label as it relates to the box/folder list. Use thick black marker for visibility.

3. Because staff is not at Baker Downtown Center on a regular basis, we will provide a range of dates and times that you can choose from for delivery. Someone from your office may bring the boxes to Baker Downtown Center themselves or you may request Facilities Services to pick up and deliver the boxes. Once you have a date set, please confirm the date with University Archives to ensure someone will be there to receive the boxes.

### The Transmittal Form

If you have any questions or comments, please contact:

Erin O'Meara, Electronic Records Archivist

Office: x6-1905

[erino@uoregon.edu](mailto:erino@uoregon.edu)

Maintained by: E. O'Meara, [erino@uoregon.edu](mailto:erino@uoregon.edu)

Last Modified: 01/04/2008

University of Oregon | 1501 Kincaid Street | Eugene, OR 97403-1299 | T: (541) 346-3053 | F: (541) 346-3485

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## MANUSCRIPTS AND ARCHIVES YALE UNIVERSITY LIBRARY

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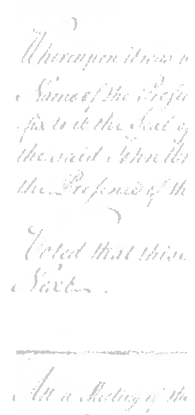
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### INFORMATION FOR YALE OFFICES :: INVENTORY TEMPLATE

All records transferred to the the University Archives must be accompanied by an electronic inventory using our template. The preferred format is Microsoft Excel. We will also accept Microsoft Word.

- [Excel template \[with instructions\]](#) (preferred)
- [Word template \[with instructions\]](#)

If you have any questions or need help completing the inventory, please contact us at [archives@yale.edu](mailto:archives@yale.edu).



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### Instructions for Creating an Inventory:

1. Save this inventory to your desktop (or to an appropriate folder on your computer).
2. Open inventory & click on the **About the Records** tab.
3. Enter the **name of the office** responsible for creating/maintaining the records in the field marked **“Creator.”** Do NOT enter your own name. (e.g. School of Architecture. Dean's Office.)
4. Give a brief **description** of the **content** of the **records**, including **span dates** (e.g. Administrative and financial records of the Dept. of Manuscripts and Archives, ca. 1791-1993).
5. Enter the name of the **departmental contact** and their **telephone number**.
6. **Click** on the **Inventory** tab.
7. As file folders are packed into archival boxes, follow these steps:
  - ⟨ **Description.** Enter the title of each folder in its own row of the description column.

**Note:** When necessary, include higher-level categories that describe a series of folders, such as the descriptions found on file cabinet labels, in boldface type and use the increase indent button to indent those file folders that correspond to that particular category. (see **Example Inventory**)
  - ⟨ **Date.** Enter the span dates of materials in the folder in the corresponding “Date” column. Accepted formats include: 1997, 1997-1998, 1997 Dec 13, or ca. 1997.
  - ⟨ **Box.** Enter the box number that the file is assigned to in the corresponding “Box” column.
  - ⟨ **# of Folders.** Enter the number of folders the file fills in the corresponding “# of Folders” column (e.g. a budget file may consist of 3 folders, while a student’s file may contain just one). **Note:** This is **NOT** intended for sequential numbering of the folders, only for noting the total number of folders for a particular topic, subject, etc.
8. Email the electronic file as an attachment to [archives@yale.edu](mailto:archives@yale.edu)

Questions can be sent to [archives@yale.edu](mailto:archives@yale.edu).