

## University Archives Records Management Program

### Guide to Transferring Records to the Records Center

AUC's Records Management Program operates Records Center facilities (with locations in the Administration and Facilities buildings) that provide storage space for the inactive records of university offices. The Records Center offers secure, climate controlled storage conditions, and the records stored there are available only to the office from which they were transferred. The records, after the appropriate period of time indicated in the university's Records Retention Plan, are shredded, recycled, or transferred to the University Archives. For transferring records to the Records Center, follow the procedures below.

1. Contact Records Management Program Staff to **request the records boxes needed** to contain the files you will send to the Records Center (see the Records Management Program Contact Information below). The boxes are a standard size (38 cm long by 31 cm wide and 27 cm high) to fit on the shelving in the records center. The boxes and lids will be sent unassembled and flat, so if you are requesting boxes for the first time a Records Management Program staff member can show you how to construct them. Contact Records Management staff if you have records of a particular size or format that require another kind of container.

2. **Pack the boxes** in the following way:

- ▶ Each box should contain only records that belong to the same "Record Type" as listed in the Records Retention Plan. Mixing records of different types, which often have different retention periods, can result in the wrong records being discarded, or at the wrong time.
- ▶ Each box should contain only records that have the same retention period indicated in the Records Retention Plan. Example 1: Expenditure/Purchasing records from 2005-06 would be scheduled for disposal before the same kind of records from 2006-07, and so they should not be mixed in the same box. Example 2: Departmental student files for those who graduated in 2005 would be scheduled for disposal after 7 years, and so should be packed together, but not in the same boxes with files for students who graduated in 2006.
- ▶ Boxes should be at least half-full; wait until you have at least half a box of material before sending it to the Records Center.
- ▶ Do not over-fill the box with folders; leave a few centimeters of space to permit retrieval.
- ▶ Do not pack hanging folders with metal rods in the records boxes, as they do not fit properly. Use some other kind of paper folder instead, but not plastic sleeves.
- ▶ To pack ring binders or *classeurs* into the boxes, lay them flat; if they are packed on their sides the box lid will not fit tightly and the box will not fit properly on the Records Center shelving. Each box can contain about three or four binders packed flat; but make sure that the box lid fits securely; if not, use another box. If a binder is too large to fit into a box, remove the contents and place them into a folder labeled in the same way as the binder.

**3. Complete and attach the Records Center Box Label.** Records Management staff will send you these labels along with the boxes.

► Write the following information clearly in pencil:

**Department / Office Name**

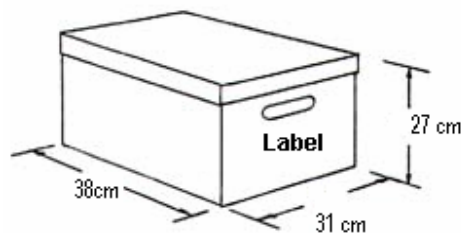
**Record Type:** Use the Records Retention Plan for guidance, but additional detail can be added. Abbreviations may be used if their meanings are clear.

**Box Number \_\_\_ of \_\_\_:** Indicate the number of the box and the total number of boxes (i.e., Box 3 of 5) in the transfer to the Records Center.

**Portion:** When files of the same record type occupy more than one box, indicate which portion of the records is contained in the box. Example 1: If there are 8 boxes of purchasing records for one year, write “3 of 8” on the “Portion” line for the third box. Example 2: Write “A-M” for a box containing personnel files for names beginning with those letters.

**Dates:** The earliest and latest dates for the records contained in the box  
Records Management Staff will complete the remainder of the label.

► Place the label on one side of the box, under the handle cut-out, as shown below:



**4. Make a list of the contents of each box.**

► Give the list a heading containing the same information as the box label:

Department/Office Name; Record Type; Box \_\_\_ of \_\_\_; Portion; Dates

► List the title of each folder or binder/*classeur* (and subdivisions of binders if necessary).

► Send the box list to the Records Center as an electronic file, as well as a hard copy along with the Records Transfer form (see below). Place a second hard copy of the list inside the box of records it describes.

**5. Complete the Records Transfer form** (this form will be emailed to you when you request the records). Send a signed hard copy of the form to the Records Center when the boxes are transferred, and also send an electronic version by email. Attach the list of box contents with the form (electronically and in hard copy).

**6. Contact Records Management Program staff to arrange for transfer of boxes to the Records Center.** When the Records Center staff receive the boxes, they will assign each a unique accession number for identification purposes, and they will check to see that the contents match the box contents list. Then you will be sent a signed copy of the Records Transfer form acknowledging the records center’s receipt of the boxes.

<b>Records Management Program Contact Information</b>	<b>Telephone</b>	<b>Email</b>
Records Management Program General Contact/ Records Center (To arrange to transfer records or to retrieve or view files stored in Records Center)	TBA	recordsman@aucegypt.edu
Deputy Records Manager Dr. Mohammed Ezzat	6328	mezzat@aucegypt.edu
University Archivist and Records Management Program Director Stephen Urgola	6327	surgola@aucegypt.edu
Assistant University Archivist Terra Kridler	6327	tkridler@aucegypt.edu