Procedures for Document Retention

When storing files at the District Office, each department is responsible for providing their own labels and packing their own boxes. Due to size limitations within the storage facility we can only store Liberty Bankers Boxes. Any other boxes **Any other boxes will not be accepted.** You can order the boxes and labels through Office Max

Step 1: Order your boxes and labels

- Liberty Bankers Boxes. (Item #: 20101373)
- Avery labels 5165 required (Item # : 07013689)

Step 2: Boxing the Records

- Organize the records in a sequence that reflects the classification and filing procedures used while they were in your office.
- Leave about 2 cm (about 3/4 inch) of space in each box to make file retrieval or re-filing easier.
- Review all the files.
- Remove non-record material such as externally published reports, supplies or equipment catalogues flyers, blank forms, reference articles, large paper clips, rubber bands and hanging folders.
- Transfer any material stored in binders to standard file folders and label them appropriately. Create more than one file for each binder if necessary.

Step 3: Entering Data

Part A

- Download the Administrative Services Document Retention Inventory List
- You will be prompted to save it to your desktop.
- Click Save and verify that the *Save in* Field displays Desktop
- Click Save
- Go to your desktop and right click on the ArchivesinventoryDO.zip file.
- Choose Explore
- You can then drag and drop the file to your desktop.

Part B

- Click the ArchivesinventoryDO.mdb file from your desktop
- Click on Forms
- Double Click on Archive Form
- Enter the Box number (this number is assigned by each department)
- Select your Department from the drop down list
- Enter Name of contact person
- Enter the contents NOTE: this field needs to be as descriptive as possible. The information of your records stored in the Archives is entered into a searchable database. A distinct file information will help us for future accessibility. Notes If applicable
- Press tab, this will take you to the next record
- Complete this process for each box, make sure to save your work

Step 4: Print and place Labels (Avery labels required No 5165)

- Select Reports Archives_Inventory_DO_52507.zip
- Double click on Archive Labels
- Click file > print
- Cut and place the label in the center of the handle side of the box above the black bar

Step 5: Sending the document

- Keep a copy of the document for your records\
- Email the document to Admin Services coadminservices@ccc.edu referencing that the boxes are ready to be picked up and taken to storage Admin Services will inspect the file boxes and then arrange a pick up time with Engineering.