

# Paper, Paper, and More Paper!

Professional Development Day  
January 12, 2005  
Daardi Sizemore and Anne Stenzel  
University Archives



## Paperless Office?



## Today's Presentation

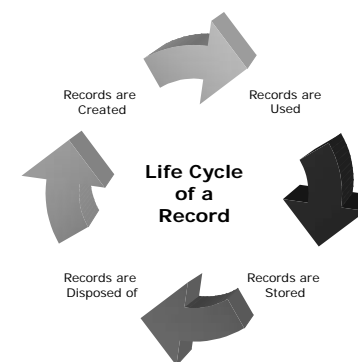


- ▣ What is Records Management?
- ▣ Electronic Records
- ▣ Services offered by the MSU University Archives
- ▣ Question and Answer Time

## Records Management is. . .



- ▣ The management of records from creation to disposition.

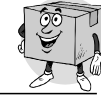


## Why Do Records Management?



- ❑ *It's required by State Law.*  
As a government entity, Minnesota State University, Mankato is subject to Minnesota records management statutes. (M.S. 15.17, 138.17 and 138.19)
- ❑ A records management program is an important feature of any organization. It can help the organization save money, time, and space through effective management of records.

## What is a "Record"?



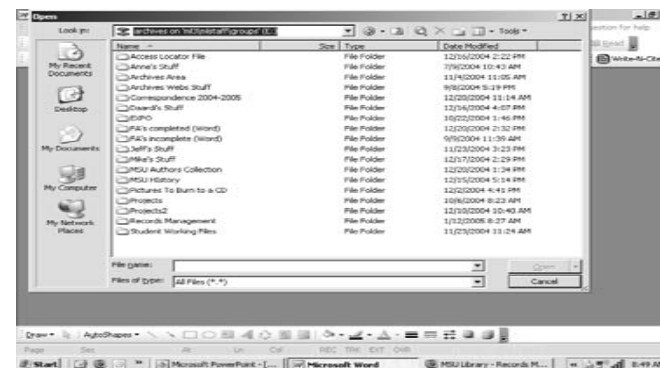
- ❑ A "record" is defined as anything you receive or create as part of your work. This includes paper, electronic, electronic media and microform versions of material. This includes but is not limited to:
  - Departmental/Office Budget reports
  - Meeting Minutes
  - Departmental/Office Staffing Lists
  - Departmental/Office Correspondence
  - University Personnel Records (official copy)

## Records are Created



- ❑ Filing
  - Alphabetical
  - Numeric
  - Subject
  - Combinations
- ❑ Computer Filing
  - Just as important as filing of paper.
  - Make folders just like you would for a paper file.
  - Have electronic files correspond with paper and e-mail files.

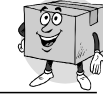
## Example of Computer Folders



## Records are Used



## Records are Stored



▣ How long should records be kept?

▣ It depends on . . .

## Your Records Retention Schedule!



- ▣ This schedule is determined by following state and federal guidelines and practices regarding how long different types of records should be kept.
- ▣ Each type of record has its own retention period.
- ▣ Most departments on campus have a schedule, but many have not been updated since 1980. The University Archives maintains and updates them (with cooperation from the departments.)
- ▣ The University Archives is working on developing a few general schedules that most units will be able to use.

## Purpose of Records Retention Schedule



- ▣ To tell you what types of records you have
- ▣ How long you need to keep them
- ▣ What to do with them when you no longer need them
- ▣ Reminder: Retention schedules also apply to electronic documents (including e-mail.)

## Sample Retention Schedule



The screenshot shows a Microsoft Word document titled 'Physics-Astronomy-RS-New.doc'. The main content is a table titled 'MUNICIPALITY OF MARYLAND RETENTION SCHEDULE'. The table has columns for 'Description', 'Retention Period', 'Disposition', and 'Authority'. Below the table, there is a note: 'This schedule supersedes 88-083 in its entirety.' followed by a list of items:

1. Budget Records
2. Course Outlines/Descriptions
3. Faculty Information
4. Final Grade Rosters
5. General Correspondence/General Information

## Two Options for Storing Records



- Office Storage
  - Current
  - Medium - High Use
  - Short retention period
  - Small amount of material
- University Records Center
  - Older
  - Low Use
  - Medium to long retention period
  - Small to large amounts of material
  - Materials listed on retention schedule

## What is the University Records Center?



- a secure
- on campus
- remote storage facility
- for the temporary storage of University records.



## Temporary Storage of Records



Mavy,  
How old are you?

- Records that are transferred to the Center should have a specific life span whether it is 2 or 20 years.

## Transfer Instructions for the Records Center



- ❑ Identify records to transfer
- ❑ Contact the University Records Center x1029 or [msuarchives@mnsu.edu](mailto:msuarchives@mnsu.edu) to obtain a Records Center Transfer form
- ❑ Complete the Records Center Transfer form along with a box inventory form if needed.
- ❑ Provide the MSU Archives with the Records Center Transfer form electronically

## Packing Instructions



- ❑ Print 2 Records Center Transfer forms; one to accompany the transferred boxes, one for your records
- ❑ Pack records in approved records boxes available from JC Office
- ❑ Number the boxes to be transferred
- ❑ Call the MSU Archives, x1029 or [msuarchives@mnsu.edu](mailto:msuarchives@mnsu.edu) for a records pick-up

## Don't Let this be Your Records!



## Who to Contact



- ❑ The University Archives staff manages the University Records Center
- ❑ We can be reached at x1029 or [msuarchives@mnsu.edu](mailto:msuarchives@mnsu.edu)



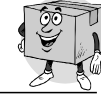
## More Information about the Records Center



- ❑ The Records Management website has more information about the University Records Center and how to transfer materials.

[http://www.lib.mnsu.edu/lib/  
archives/rm/rm.html](http://www.lib.mnsu.edu/lib/archives/rm/rm.html)

## Records are Disposed Of



- ❑ What do you do with records when they have reached the end of their retention period?
- ❑ Usually one of three options
  - Throw away
  - Shred (Very important if ANY confidential information is contained in the records.)
  - Sent to the Archives for permanent storage and access.

## Disposing of Records



- ❑ Shredding service on campus
  - If items are in the University Records Center, we will send you a destruction form when it is time to shred and will take care of it for you.
- ❑ Pick a time once or twice a year to implement those schedules.
  - Put it on your calendar so it doesn't get away from you. It is easy to do.

## Transferring Materials to the Archives



- ❑ Transfer Forms must accompany all materials sent to the Archives
- ❑ Because of limited space, we can only take items designated as archival by the retention schedules. Examples include correspondence, minutes, and publications.
- ❑ These items help document the history of the University. We have materials from the beginning of the school in 1868 to the present.

## What is the University Archives?



- ❑ Maintains the permanent records of the University.
- ❑ Is open to researchers, faculty/staff, students, alumni, and the general public.
- ❑ Items cannot be checked out.
- ❑ Once items are transferred by a department they are no longer "owned" by the department.

## Records Management Services offered by the University Archives



- ❑ Update departmental retention schedules
- ❑ Advise on filing and storage options
- ❑ Store records in the University Records Center
  - Provide electronic transfer forms for items to be transferred
  - Pick up items from your office
  - Retrieve individual boxes/folders stored in Records Center
  - When appropriate, destroy/dispose of materials

## Questions?

University Archives Staff  
Daardi Sizemore  
Anne Stenzel

Phone- 390-1029  
E-mail – [msuarchives@mnsu.edu](mailto:msuarchives@mnsu.edu)  
Office –Memorial Library 2054  
Campus Mail – ML3097