

GUIDE FOR TRANSFERRING HARDCOPY INFORMATION AND RECORDS



Important: All hardcopy information and records must be sighted, appraised, and authorised for transfer by Corporate Records Services before any physical transfer can take place.

1. Contact Corporate Records Services

Contact us at corporate.records@otago.ac.nz to arrange a date and time for one of our team to come and assess your records. We will also provide guidance and answer any questions you might have on the transfer process.

2. Procedure For Transferring Hardcopy Information and Records

2.1 Order Archives Cartons (Boxes):

All hardcopy information and records must be packed in official University archives cartons. Cartons are available free of charge from Corporate Records Services. Please indicate the quantity and provide a physical address for delivery.

Carton dimensions are: 260mm H x 280mm W x 400mm L. One carton will hold three small file boxes or three to four lever arch files top and tailed depending on how full each file is.

2.2 Pre-Sort Your Information and Records:

- Before packing your information in the cartons, arrange the information by:
 1. Record type / description
 2. Date order from earliest to the most recent for each record type.
- Remove large metal clips and rubber bands. Records can be bound with string or woven legal tape.
- Remove any extraneous items before packing.

2.3 Create your Inventory (Spreadsheet Listing the Box Contents)

- On an Excel spreadsheet list your information in columns with the following headings:
 1. Box Number (**compulsory**)
 2. Record Description (**compulsory**)
 3. Date or Date Range (**compulsory**)
 4. Record Format (loose, folder, lever arch file, small box etc)
 5. Any additional information that may assist in identifying the record in the future.
- List in sequential order from the earliest to the most recent date.

2.4 Pack Your Information

- Pack your information in the order that it appears on your inventory.
- Apply a box number to your inventory.
- Pencil (use pencil only) the box number within the area marked for the label on the front of the box. Do not write anywhere else on the box or the lid.
- When each box is packed, the box lid must sit firmly on the box so please do not over fill.

2.5 Complete the Information and Records Transfer Request Form

- The Information and Records Transfer Request Form can be found here:
<https://www.otago.ac.nz/administration/corporaterecords/otago0239897.pdf>
- Email the completed form together with your inventory (spreadsheet) to
corporate.records@otago.ac.nz

3. Transfer Authorisation

When your transfer has been approved, we will issue you with a Transfer Number and provide instructions on how to send the records to us. This number is unique to this transfer, and we recommend that you apply this number to a copy of your inventory (spreadsheet) and keep in an accessible place for future reference.

Please remember that we are available any time to answer your questions at corporate.records@otago.ac.nz

Thank you