How Do I Complete A Records Inventory? Video Transcript

Slide 1: Records Management at Duke

Welcome! The Records Management program at Duke University provides guidance to university offices and departments on managing their physical and electronic records.

Slide 2: What is a Records Inventory?

The University Archives accepts transfers of historical records from university offices. All physical records transfers to the Archives must include a records inventory. But what is a records inventory?

Slide 3: What is a Records Inventory?

A records inventory is a list of the records being transferred and includes such information as box number, folder title, and date. A records inventory allows both the transferring office and the Archives to have a record of the documents being transferred. This inventory is later converted into a finding aid, which allows users to search the collection.

Slide 4: Templates

University Archives provides an Excel spreadsheet template that can be used for a records inventory. The template is available online. If you are not comfortable using the Excel spreadsheet, you can also use a Word Document to record the inventory information.

Slide 5: How to Complete the Excel Template

Here is the Excel inventory spreadsheet template, which is available online. To fill out this spreadsheet, begin by entering your office or department name in the top box.

Slide 6: How to Complete the Excel Template

On the left hand side you will find a column for the folder title. Please list the title as written on the folder. The next column over is for the folder date. Please enter the date if known. If you do not know the date, do not guess! It is perfectly acceptable to leave the date field blank.

Slide 7: How to Complete the Excel Template

The final column is for the box number. This is the number of the records box that the folder is located in. Enter the number in the field. If you have multiple boxes to transfer, please list them on the same spreadsheet. For example, list 4 files in box 1, and then also 1 file in box 2 on the same spreadsheet. Do not create different spreadsheets for different boxes.

Slide 8: Tips

Here are some quick tips. When describing records, be as specific as possible. If you describe everything as document, binder, or miscellaneous, it will be difficult to find the records you are looking for at a later date. The records inventory should be completed and submitted digitally; do not print out the inventory and fill it out by hand.

Slide 9: Next Steps

After you have finished completing the inventory spreadsheet, contact the Records Manager to begin the records transfer process. A records inventory must be submitted in order to transfer records to the Archives!

Slide 10: For More Information

For more information on the records management program, please visit our website at the address below.

Slide 11: Questions or Concerns?

Thank you for joining us today. Do you have any questions or concerns? Please contact the Records Manager at hillary.gatlin@duke.edu.