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Process for Archiving

# Archiving

Office of Governance and Corporate affairs  
(Policy and Records)

User guide for TRIM



## Process for archiving

When information is no longer used regularly, decisions have to be made whether it can be destroyed or whether it has some continuing value. A disposal authority is used to determine the minimum amount of time the information needs to be kept before it can be approved by the Manager, University Records for destruction. Further information can be found on the [Complaints and Records Management](#) webpage.

### Prepare for Archiving

- Group similar types of records together and tackle the easy records first eg examination papers, policies, student files, forms, invoices. Correspondence and case files need more thought as it can sometimes be a little harder to determine their archival value.
- From the CSU Complaints and Records Management webpage download the following forms: Archive Box Content List form (for hard-copy records), Request for Authority to Destroy Records form (hard-copy and electronic records due for destruction).
- To ensure workplace health and safety, all hard copy records need to be archived using specialty Type 1 (T1) storage boxes (H) 25cm x (W) 18cm x (D) 40cm. Once you've determined the approximate number of boxes required, you can contact the Complaints and Records Management unit at [records@csu.edu.au](mailto:records@csu.edu.au) to see if they have any second hand T1 boxes available, if not you will need to order them (see How to Purchase Records Storage Boxes)
- Separate any folders that contain only low value information, such as copies, as these can be disposed of once the reference period ceases. Just make sure that all the information in the folder is of low value before it is disposed of.
- Any folders that have not been used or referred to in two years or more should be part of your archiving project as they have become inactive and can take up valuable space. We would quickly run out of space if we kept everything.
- Make sure you have enough space to spread out and allow yourself plenty of time.
- Each box will require its own Archive Box Content List form to be completed as much as possible and sent to the Manager, University Records who will issue the GDA reference and retention periods and provide labels for your storage boxes.
- Ensure that all files in each box are similar activities i.e. financial, human resources, committees etc and all files within each box have the same retention period.

### Archiving electronic information

Electronic information also needs to be archived. Once the Manager, University Records has issued the disposal details, include them in the electronic folder title. To do this you will need to rename the folder and add the following information:

- CLOSED
- Folder name
- Disposal authority reference
- Disposal action and date

*Eg CLOSED Folder name/title GDA23-23.2.2 D02 100101*

The closed electronic information records should be moved to a folder titled Closed for HPE RM and the Manager, University Records should be given access to this folder.

## Packing records storage boxes

The range of destruction should not be more than 2-3 years in any one box i.e. due for destruction 2012-2015

- Box up folders that are archival (A) or permanent (P) separately from those that have a destruction date.
- Records that are in lever arch folders must be placed in manila folders and taken out of the lever arch folders, as they are very bulky and take up space. In this case ensure you record the folder title either on the manila folder or on a sheet of paper.
- Pack folders in the box on their spines vertically.
- Make sure the boxes are not over packed, you should be able to fit your hand into the box without damaging the records and the lid must be able to close properly. Do not use packing tape of any kind, the box should be packed to ensure optimum weight makes this possible.

## Destroy, store or archive?

After you have boxed and/or sorted your records and using the assigned disposal details as a guide, you will find that they fit into three categories:

### Records due for destruction

Records that are due for destruction will require a Request for Authority to Destroy Records form to be completed and approved by both your business unit manager and the Manager, University Records. Further information regarding authorised destruction methods can be found under [Destroying Records](#) on the CSU Complaints and Records Management webpage.

- **Records not due for destruction yet** (also known as inactive temporary records)  
For physical records, a copy of the completed Archive Box Content List should be forwarded to the Manager, University Records. These inactive records can be stored in an approved storage space. For electronic records an email containing filenames of the closed electronic information records should be forwarded to the Manager, University Records. This information will be captured into HPE RM and at the appropriate time you will be advised when to destroy the records.

### Records that are archival or permanent

Contact the CSU Regional Archives & University Art Collection, Wagga Wagga South Campus at [archive@csu.edu.au](mailto:archive@csu.edu.au) to notify incoming records storage boxes. Contact your local [CSU Campus Mail Services](#) to organise pickup and delivery of finalised boxes for archiving.

## Quick tips

- If a folder has contents that cover multiple activities you'll need to apply the longest retention period of any one of the documents on the folder to the entire contents of the folder. Do not split folders.
- Once folders are closed don't add any more documents to them.

## Further assistance

Please see the following related guides:

- [What are General Disposal Authorities?](#)
- [Disposing of Records](#)
- [How to Purchase Records Storage Box](#)

