

Listing Storage Box Contents in POST or Excel

GROUPING DOCUMENTS

Keep similar records together to reduce expenditures for future access. If you often review certain groups of records together, you should consider keeping them together in the storage box. Inventory them using the [President's Offsite Storage Tracking \(POST\)](#) tool or use the fields in POST to create an Excel list to share with Records Management.

DESCRIPTION OF CONTENTS

Title or short description

Assign a short title to the box's contents, e.g., [2016 Strategic Planning Binders](#).

Index your Box here

If the short title needs to be expanded upon, this longer field allows you to add a detailed list of contents or expand on the description title, e.g., [2016 Strategic Planning Binders](#)
[1. Planning for internal initiatives Jan-March](#)
[2. Survey results from 2016 open house](#)

RECORDS CODE

Identify the type of record contained within the folder or box. For example, [Program administration – operational: records that document organizational activities](#) are identified as Records Code 0002B. Choose 0002B from the dropdown menu.

DATE RANGE

Use this field to identify the range of documents contained within, e.g., 1/1/2016-8/15/2016 or simply 2016.

RETENTION START DATE

For the previous example the retention start date would be the next year after the most recent record in the box was created: 2017.

UNIT / DIV IDENTIFICATION

Find the Unit/Div that aligns with the team that owns these records. We will clarify this when we set your permissions the first time. Look up the longer descriptive name in the site contents menu.

IRON MOUNTAIN BOX NUMBER

This is a nine-digit number that begins with the prefix RF e.g. [RF123456789](#). The RF indicates that these labels have an RFID tag to enhance the security of the box at the Iron Mountain offsite storage center. Get these via iRequest.

SHARING DOCUMENT INVENTORY

Using POST is the simple way to share your department's records inventory with Records Management. You also may benefit from using an Excel sheet in certain cases. A template is available from the Records Management.

SCHEDULE A TRAINING

- Please contact Records Management for an Excel storage template, to schedule a demo of the UC Records Retention Schedule, or to set up POST training for you.
- Records@ucop.edu
- 510-987-0399