Box Cataloguing Form Instructions

MP2-F04/210518

Initial cataloguing of your boxes in an accurate manner is an important element of the archive management process. Using the format and procedures below to correctly complete your cataloguing form, assists in the management of your information and the rapid retrieving of the relevant box or file, at any point in time in the future.

1. Barcode Placement: Using the barcode labels provided, affix one barcode label per box, to the end of a box, as per the adjacent picture. Please do not place barcodes on the sides or lid, or it will hamper the scanning of barcodes during collections or picking requests.

7. Destroy/Review Date: Please enter your required Destroy or Review Date relating to the contents of the box.

By Providing EvaStore with a Destroy/Review Date at the outset, it will allow us to effectively manage your boxes as they approach the end of their lifecycle, so that you are not paying unnecessary on-going storage charges for items that are past their Destroy/Review date.

Although the retention date for an individual box may be many years away, we check our management software (O'Neil) on a monthly basis to identify boxes that are due for review/destruction, at which point we will notify you by forwarding a report of all relevant boxes. We then await your confirmation, prior to either confidentially destroying the boxes, or alternatively we can return them to you for your review.

8. Customer / Department Account Code: Please enter your EvaStore account code here (if known), so that we can allocate the boxes to your account. Should there be multiple departments under your account please enter the specific EvaStore account code we have allocated each department.
Note: If you don't know your account number, you may enter your own particular department description, to help us identify department ownership in the future.

2. Box Barcode: Please start here on the spreadsheet and input the barcode number from the label on the end of each box. One barcode number per row. **Please note this field is mandatory.**

3. Box Reference: Please enter your unique reference for the box (if applicable) e.g. Box 1, Finance 3 etc. **Please note this field is restricted to 15 characters.**

Box Barcode	Box Reference	Box Contents	Sequence Begin	Sequence End	Date From	Date To	Box Destroy / Review Date	Customer / Department Account Code
100182		Jan 2010 - Jun 2012 New Starters			01/01/2010	30/06/2012	01/07/2018	
000012	Finance 1	Sales Invoices SI027856 - SI027898, Credit Notes CN03142 - CN03250	3142	27898			01/10/2016	1234FIN
012345	Box 18	Leavers A-Z 2013	A	Z	01/01/2013	31/12/2013	25/06/2045	1234ACC

Example

4. Box Contents: Please enter your comprehensive description of the box contents, information entered in here can be searched for on our system at a later date.
Note: Should the box contain multiple files and you would prefer to input data specific to each file on separate lines, then repeat the Box Barcode number and Box Reference (if applicable) into the respective cell(s) on the left and type the individual file details into the Box Contents cell i.e. one row per file record.

5. Sequence Begin / Sequence End: This is relevant if your box contents, or the file(s) contained within, have a sequential order and there might be the need to locate a specific numbered file, or document, from the sequence at any time in the future.

6. Date From / Date to: This is relevant if your box contents, or the file(s) contained within, have a date range e.g. a box may contain a years worth of accounts so 2013 would be 01/01/2013 to 31/12/2013. Again this can assist in future retrieval.