

Ingalls Library

This schedule applies to records in all formats

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Accession Books	Ledger or binder records of book and slide accessions	*P	0	*P	Books may be transferred to archives at the discretion of the Director of the library
2	Administrative files, routine	Purchase orders for supplies, requests for service, travel files, time sheets, leave applications, office copies of personnel files, etc.	A + 1 year	0	A + 1 year	HR is department of record for personnel. Dispose of personnel records by shredding. CWRU work study records are maintained by CWRU
3	Annual reports and statistics	Unpublished reports and statistics	5 years	P	P	The Library Director sends electronic files to archives annually
4	Acquisition records	Orders, copies of invoices, and other records related to the acquisition of library material; and the electronic acquisitions module of the library ILS	CY + 4 years	0	5 years	Invoices are retained in the accounting office for seven years (records storage); statistics are reported in annual reports
5	Bindery records	Correspondence, packing slips, Able web based bindery software	A	0	A	
6	Book conservation records	Records relating to the conservation of library materials.	A	P	P	Analog files are kept in the Book Conservation Lab. Information relating to conservation activities is also added to the holdings record

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7	Budget details	General ledger sheets from the finance office	4 years	0	4 years	
8	Budget working papers	Papers used to develop and manage annual budgets	7 years	0	7 years	
9	Circulation records	Aggregate numbers of items circulated to various categories of users, and library use statistics	A	0	A	Retain any spreadsheets or other analog statistics until published in the museum annual report, then discard.
10	Contracts	Artstor, RLG, OCLC, etc.	A	P	P	
11	Classification schedule	Historic classification scheme dating to 1910 with annotations	A	P	P	
12	Correspondence, reference		CY	0	CY	
13	Correspondence and memoranda, routine	Includes letters of transmittal, cover letters, announcements, address changes, invitations, acknowledgements, reservations, etc.	4 years	0	4 years	(see #16, Gifts and donor records, for the retention of records of major gifts)
14	Correspondence and memoranda, substantive	Correspondence related to policy, procedures, activities, and art work	CY + 3 years	P	P	Usually found in subject files

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15	CWRU Joint Program records	Records of the joint program created by the library director and associate librarians including correspondence, reports, rosters, statistics, etc.	CY + 4 years	P	P	Includes electronic that are forwarded to archives at the point of creation and are stored in the electronic archives folder
16	Digital image backups	DVD backups of images stored in the image library system	*P	0	*P	Regular, periodic (5 year) review and migration of files, including all metadata, is expected
17	Financial deposit records	Records of items purchased in the book sale and photocopy totals	A	0	A	Accounting is the office of record for this financial information
18	Gifts and donor records	a) Records of gifts b) index file	a) CY + 9 years b) *P	a) P b) 0	a) P b) *P	
19	Exchange records	Records of exchanges with other museums and libraries	A + 4 years	0	A + 4 years	
20	Grant administration records – grants received		A + 5 years	P	P	
21	Interlibrary loan records		CY + 1 year	0	2 years	
22	Library system	The databases and software used to perform library functions	*P	0	*P	

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item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
23	Library systems records	Records of databases and software used to perform library functions including correspondence, budgets, maintenance records, contracts, logs, backups, manuals, and working files	A + 2	P	P	This series should be weeded before transferring to archives. Reference material, copies of contracts, manuals, and other nonessential material should be discarded
24	Minutes and related material prepared by your department		A + 2 years	P	P	
25	Minutes and related material, all others	Informational copies of meeting minutes and related material NOT created by your department	A	0	A	
26	Patron Registration forms		CY	CY + 6	7	
27	Photocopy orders		CY + 1 year	0	2 years	
28	Policy statements and procedure manuals	Includes CMA cataloging and service bulletins	A	P	P	Forward electronic copies to archives as they are updated; forward historic position manuals when no longer needed

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29	Professional activities files	Records related to participation in ARLIS, ARLIS/OH, MAC, RLG, SAA, VRA, and other professional organizations	A	0	A	Staff should update resumes regularly and send a copy to archives for biographical files
30	Rights and reproduction files	Copies of reproduction agreements that include a provision to donate copies of published material to the library	A	0	A	Record copy is created in the Registrar's office and comes to archives from that department for a 15 year retention
31	SCIPIO records	Records related to the development and implementation of the SCIPIO auction catalog	A + 3 years	P	P	
32	Subject files/project files	Records related to collection development, retrospective conversion, planning, library activities and procedures, professional memberships, and interdepartmental relationships	A + 2 years	P	P	

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33	Supply/vendor catalogs and telephone directories		A	0	A	Recycle according to museum policy
34	Vendor records, images	Includes sales catalogs, invoices, contracts, order records, and other material	A + 4	P	P	Extensive weeding of this series is expected before transfer