LAWRENCE BERKELEY NATIONAL LABORATORY
ARCHIVES & RECORDS OFFICE
Bldg. 69
Phone: (510)486-5525

Email: aro@lbl.gov
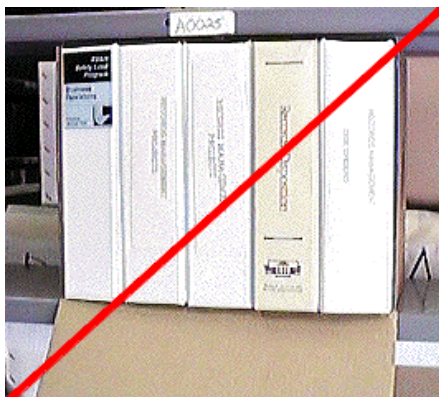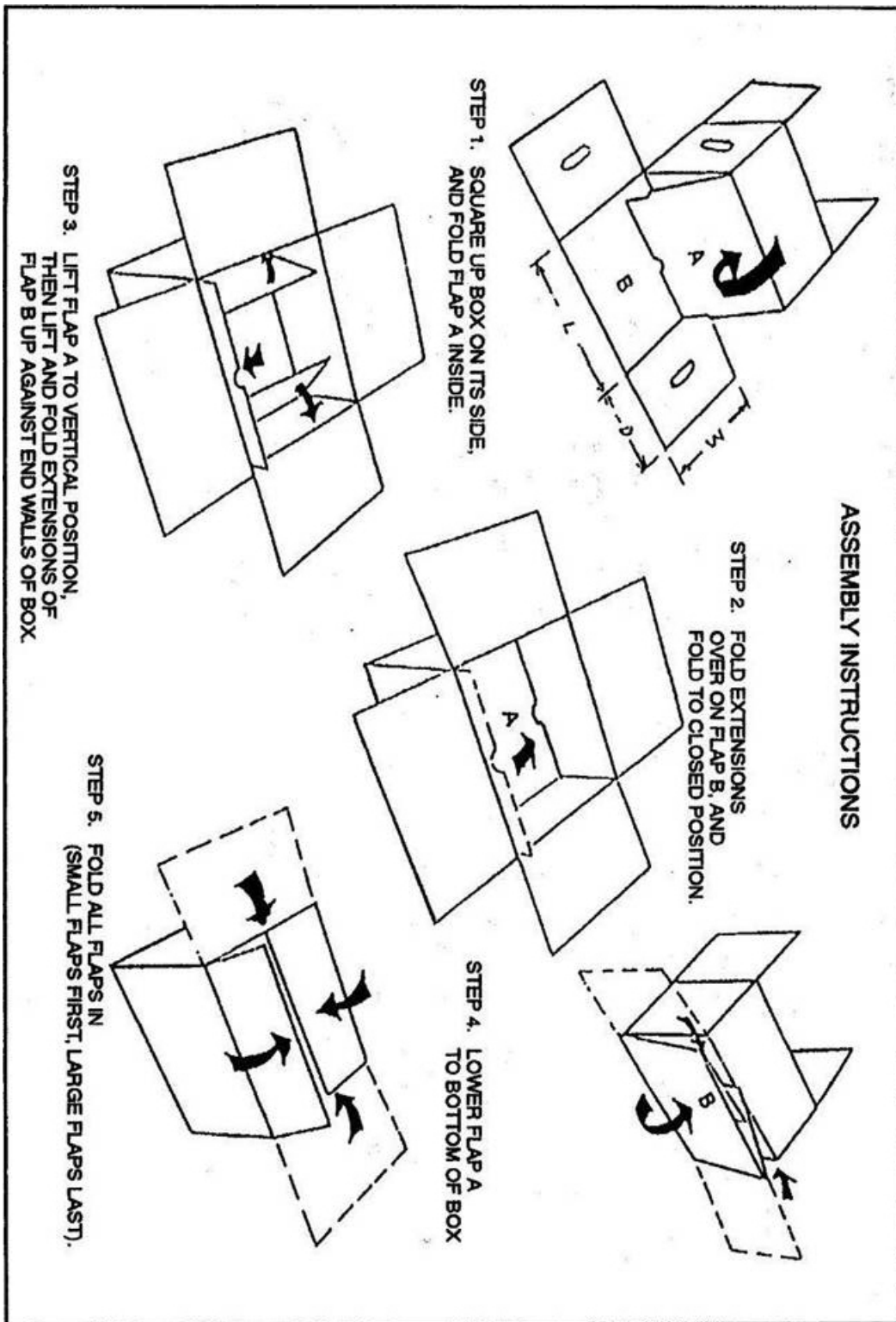Web: https://commons.lbl.gov/display/aro/Archives+and+Records

READY REFERENCE SHEET

See ARO FAQ at https://commons.lbl.gov/display/aro/FAQs

Archiving Records:

- Only archive records -- see https://commons.lbl.gov/display/aro/Record+Definition for definition.
- Do not archive nonrecords (https://commons.lbl.gov/display/aro/Non-record+Definition) or personal papers (https://commons.lbl.gov/display/aro/Personal+Papers+Definition)
- Go to the ARO web site at https://commons.lbl.gov/display/aro/Records+Transfer+Procedure and read the Transfer Instructions and Standards.
- Organize and box records by series (https://commons.lbl.gov/display/aro/Record+Series+Definition)
- All files must be in labeled file folders.
- No binders, magnetic media, or hanging file folders:

- Contact ARO to get boxes.
- Assemble the boxes:

ASSEMBLY INSTRUCTIONS

STEP 1. SQUARE UP BOX ON ITS SIDE, AND FOLD FLAP A INSIDE.

STEP 2. FOLD EXTENSIONS OVER ON FLAP B, AND FOLD TO CLOSED POSITION.

STEP 3. LIFT FLAP A TO VERTICAL POSITION, THEN LIFT AND FOLD EXTENSIONS OF FLAP B UP AGAINST END WALLS OF BOX.

STEP 4. LOWER FLAP A TO BOTTOM OF BOX

STEP 5. FOLD ALL FLAPS IN (SMALL FLAPS FIRST, LARGE FLAPS LAST).

- Transfer the records from existing filing equipment to the boxes, maintaining the same order.
- Treat the box as a file drawer – the front is marked FRONT and has spaces labeled ACCESSION NUMBER and AGENCY BOX NUMBER.
- Use pencil only and number the boxes in the front (where it says FRONT), upper right corner where it reads, "Agency Box Number". Do not write anywhere else on the box.
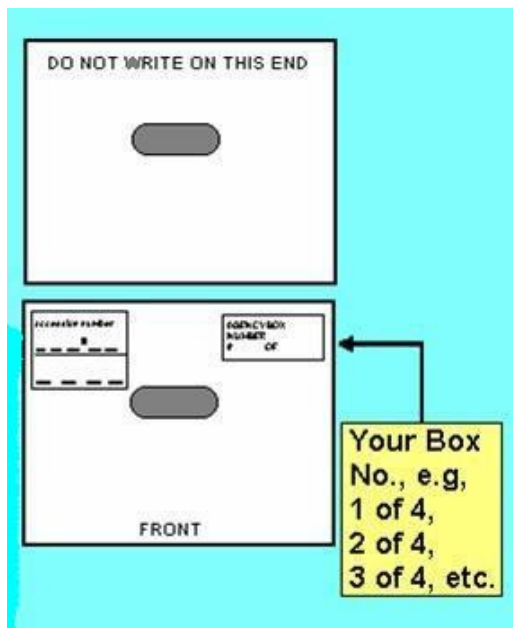
- Leave one to two inches of space in each box – don't over or under pack.
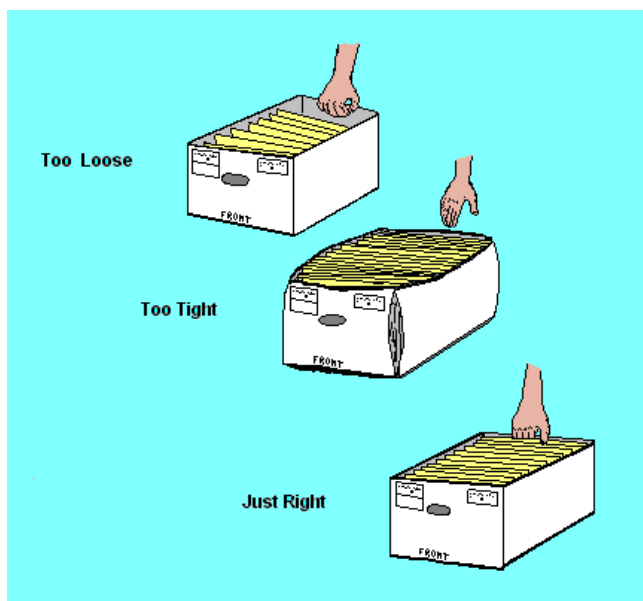
- Download the transmittal and quality checklist from the forms page at https://commons.lbl.gov/display/aro/Records+Transfer+Forms.
- Fill in the information about the records in the fields provided. If you wish and if your accession meets all of the Records Transfer Standards, ARO will do the data entry on all the folders in your boxes--we will enter the title of each folder **exactly as it appears on the folder** into our database.

Lawrence Berkeley National Laboratory
Archives and Records Office
Records Transfer Form

Use one form for each records series. A records series consists of related files having the same disposal authority and disposal date. Please refer to the transfer and packing instructions for details at https://commons.lbl.gov/download/attachments/61276865/LBNL_ARO_12_Steps.pdf or contact the Archives and Records Office at aro@lbl.gov or 486-5525.

Division Information Technology	**Berkeley Lab Accession Number (this will be assigned by ARO upon receipt of the records)**
Department Division Directorate	**Section, Group or Project** Archives & Records Office
Department Head Helen Cademartori	
Person Transferring the Records John W. Stoner	
Phone Number 510-486-6399	**Location** 69-119D
Records Title John Stoner's Archives and Records Office (ARO) Records Management Subject Files	
Inclusive Dates of the Records 2007-2009	**Number of Record Boxes** 2

Brief Description of the Records

This accession documents the activities of John Stoner, Laboratory Archivist and Records Manager at Lawrence Berkeley National Laboratory (LBNL) in providing records management services to the Laboratory. The types of records include but are not limited to training presentations, correspondence, email printouts, and reports. Subjects documented include but are not limited to Department of Energy (DOE) and the National Archives and Records Administration (NARA) regulations and meetings, University of California (UC) records management policies and procedures, and Archives and Records Office (ARO) database redesign. The records are arranged alphabetically by file folder heading.

Type of Materials *(Check all that apply)*

  __ Architectural and Engineering Drawings   __ Photographs
  __ Graphs and Charts   __ Other (Specify):
  __ Microfilm
  X Paper Files

Lawrence Berkeley Laboratory	
Records Transfer Form Addendum	

NOTE:
If you wish and if your accession meets all of the <u>Records Transfer Standards,</u> ARO will enter the title of each folder **exactly as it appears on the folder** into our database. If your processes or applicable laws and/or regulations require more information than what appears on the folder (for instance, information on the contents of the folder, or subfolders within the main folder), then **you** will need to enter that information into the transmittal form addendum yourself. See example below.

Records Title

Box Number	Folder Number	Folder Title	Page 2 of 2
1	[Accordion Folder 1--Database]	Costs	
1	[Accordion Folder 1--Database]	Design	
1	[Accordion Folder 1--Database]	Debugging	
1	[Accordion Folder 1--Database]	Implementation	
1	[Accordion Folder 1--Database]	Scope of Work	
1	[Accordion Folder 2--DOE)]	Office of Science	
1	[Accordion Folder 2--DOE)]	Records management orders (draft)	
1	[Accordion Folder 2--DOE)]	Records management orders (final)	
1	[Accordion Folder 2--DOE)]	Records management regulations	
1	[Accordion Folder 2--DOE)]	UC Records	
1	[Accordion Folder 3--Electronic Records]	Case studies	
1	[Accordion Folder 3--Electronic Records]	DOE	
1	[Accordion Folder 3--Electronic Records]	NARA	
1	[Accordion Folder 3--Electronic Records]	National Labs	
2	[Accordion Folder 1-- NARA]	Correspondence	
2	[Accordion Folder 1-- NARA]	Service and Storage Charges	
2	[Accordion Folder 1-- NARA]	Training	
2	[Accordion Folder 1-- NARA]	Transfer of Permanent Records	
2	[Accordion Folder 1-- NARA]	Transfer of Temporary Records	
2	[Accordion Folder 2--Records Management at DOE National Labs]	BNL	
2	[Accordion Folder 2--Records Management at DOE National Labs]	LLNL	
2	[Accordion Folder 2--Records Management at DOE National Labs]	NREL	
2	[Accordion Folder 2--Records Management at DOE National Labs]	ORNL	
2	[Accordion Folder 2--Records Management at DOE National Labs]	SLAC	

- Email the form to ARO (aro@lbl.gov).
- Place a hard copy of the forms in the first box of the series.
- ARO staff will review the forms and then send you a link to the Transportation Work Request web page (https://workrequest.lbl.gov/).
- After processing your records, ARO will send you a PDF transmittal.

Retrieving Records:

- Consult the PDF transmittal ARO sent you.
- Go to ARO's online records request web form at https://commons.lbl.gov/display/aro/Records+Request+Form
- Provide as much information as you have about the box(es) and/or file(s) you want back from storage.

Help Processing Your Records:

- For business records:
    - Free advice.
    - Free data entry on all the folders--we will enter the title of each folder **exactly as it appears on the folder** into our database.
    - See https://commons.lbl.gov/display/aro/business+records+processing for details.
- For scientific records:
    - The entire process is FREE.
    - Contact Beret Ranelletti at BARanelletti@lbl.gov or ext. 4685.
    - For more information see https://commons.lbl.gov/pages/viewpage.action?pageId=61276598

More Help

- Go to the ARO web site at https://commons.lbl.gov/display/aro/Archives+and+Records
- Contact us directly at aro@lbl.gov or x. 5525.