

RECORDS MANAGEMENT

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In recent years, records have become a matter of increasing concern. For a long time, there have been archival establishments in which valuable records—or presumably valuable records—have been kept. But modern reproducing methods and natural growth have resulted in more records of less quality for the archivist to deal with. Since World War II, under the leadership of the federal government, there has been a concerted effort to reduce the backlog of old records, to insure the preservation of valuable records, to make records and recorded information more accessible to administrators and researchers, and to create records of high quality. This effort has been directed toward managing the flood of records and paper work that threatens to swamp the activities that create and handle them. There has been discussion for many years about what this effort should be called, and there have been many names applied to it. Since it is concerned with the management of records, the term “records management” seems to be a simple and all-inclusive solution to the problem of a name.

Colleges and universities have become concerned more recently than others with their records problems. There have been several college archives that have attempted to bring valuable material into their custody; there have been other college archives that have, passively, received whatever was thrust at them. The mere creation of a college or university “archives” does not, in itself, solve the problem. Without a program which identifies the records that go into the archives and makes some provision for getting them there, the “archives” are apt to become dumping grounds for material that no one wants but everyone is afraid to do anything about. The absence of a program means that the college or university runs the risk of losing records that should be kept, of keeping records that should be eliminated, of maintaining records under adverse circumstances, of fragmenting documentation, and of making it impossible for either the administrator or historian to benefit from past experience.

We know that records are created. They are then processed and maintained in some manner, and finally they are disposed of

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either by destruction or by preservation in an archives. In 1955, the Second Hoover Commission Task Force on Paperwork Management calculated that about 70 per cent of the total cost of a record was in creating it. It would seem reasonable, therefore, to expect that a program to manage records would start with their creation because this represents the greatest potential for savings. This usually is not the manner in which the management of records is approached, however. Most programs come through the back door by starting with the disposal phase first.

Although it is almost like locking the barn door after the horse is stolen (because most of the cost of records has been incurred by the time they are to be disposed of), this approach to records through the disposition phase is reasonable and understandable and, in fact, may be desirable. It is easy to ascertain when records have outlived their usefulness, they frequently represent an immediate and acute problem, the need and the results of doing something about them can be understood more readily, and disposition is productive of immediate results. In addition, before paper work can be controlled and managed, someone must know what paper work there is; and the easiest way to find out is by following the first step in developing records disposition—by making an inventory. Most programs, then, start with the disposition aspect of records management—and too many of them never get away from it.

A disposition program can go to either of two extremes—everything can be kept or everything can be thrown away after a period of years. Neither of these extremes is realistic, but one or the other can easily happen if the disposition program is not carefully planned. There are several things that can be done with records to dispose of them; there are some that for historical or administrative reasons must be kept permanently; there are others that have a relatively short use for the purposes for which they were created but that need to be kept for longer periods of time because of legal, fiscal, or similar requirements; and finally, there are records that should be destroyed after having served the purpose for which they were made.

Records in the first of these three categories represent, obviously, archival material; the second represents material that should be stored in such a way that it is readily available, if needed; and the third is that which can be destroyed. The disposition plan should provide for all three of these categories of records. It is not enough for a plan to call for destroying every possible piece of paper and then keeping the left-over strays as “permanent” records; nor should the plan fail to describe specifically the material that has archival value; this material should be identified and provided for to prevent some unthinking person from destroying it.

The disposition plan is developed by "records scheduling." A schedule is a document that contains a complete disposition plan for the unit concerned. Scheduling starts by making a physical inventory of all records. There is some disagreement that this is either necessary or desirable; but if the schedule does the things that need to be done, the person who prepares it must know what records there are. And no records can be destroyed without knowing what the pattern of documentation within that unit or that institution is. There are some short cuts that can be taken; but the fact remains that it is impossible to evaluate records realistically and intelligently without full information about all of the records and without knowing what will be kept as well as what will be thrown away. If permanent records are considered to be the material that is left after everything possible is thrown away, a schedule can be written without making a complete inventory. But if the positive approach of identifying and selecting archival material first and then throwing everything else away is taken, the schedule must start with an inventory of all records.

The inventory should show several things. First, of course, is the name or the title of the records being inventoried, their inclusive date span, the volume, and the location. It may be advisable to show, also, the manner in which the records are arranged, their relationship to other records, the extent to which the record or the information is duplicated, and other factors that may affect the retention of the record. Analysis of the inventory will give other information as well; for example, if part of a records series is stored, the inclusive date of the stored records will usually give some indication of the period of time after which the records are used less frequently.

Following the inventory, the records are appraised. That is, they are examined from the point of view of their legal, fiscal, administrative, and historical value. Appraisal is deciding whether a record should be kept and for how long and why, or whether it should be destroyed and after how long and why. All of the potential uses and values of the records should be considered in making this determination. And in reviewing potential uses of records, modern methods of processing information have made it feasible to preserve voluminous records whose sheer bulk formerly made use of the data they contained impracticable. With the availability of electronic tabulating equipment and other high speed devices, it is no longer desirable to destroy or to authorize the destruction of records solely on the grounds that their bulk prevents exploitation of the valuable information in them.

Both in the appraisal process and in the succeeding step—writing the schedule—the personnel who use the records should be consulted. Their opinions, however, should not be final because they

may have an exaggerated idea of the value of the records. But they should not be ignored in the entire process, because they work with and know the records and know, further, how the records are used.

The schedule should then be prepared in such a form that it may be referred to readily by those who use it. It should show:

1. Records that are to be kept permanently because they have long-term historical or administrative value. Remember, however, that there are more records designated as permanent than anyone is ever going to want to use and that they tell a lot of things that no one wants to know. There has been some professional discussion about the very small percentage of "permanent" records. Like any generality, this low percentage may be misleading; but the fact remains that there are relatively few records that are worth keeping a long time. These permanent records should go eventually into the archives for preservation.

2. Records that are to be destroyed and after what period of time.

3. Records that may be moved to an intermediate storage area after their immediate usefulness is ended but before their final disposition may be effected. This final disposition may be preservation in the archives or it may be destruction. A college or a university may not be large enough to justify both an archives and an intermediate storage area (records center). But the archivist would be well advised to offer this records center service; transfers into the archives are simplified, and the possibility of accidental destruction of valuable material is minimized. The archivist will find that he is handling the destruction of almost all records that are destroyed; This will, unless the volume is too great, permit him periodically to check the schedule to be sure that it does not call for the destruction of material that should be kept.

4. Records that are to be microfilmed prior to destruction or, in the case of essential records, for dispersal to a security location. Microfilming is expensive (in North Carolina we have computed an average cost of \$28 per cubic foot to microfilm records), and it should be used to reduce the volume of records only when the originals must be kept so long that the storage cost offsets the filming cost or when the originals are of such form or size that they cannot be readily preserved in the original. These standards do not, of course, apply to microfilming to obtain a security copy of an essential record.

5. Records that should be reviewed or "screened" prior to destruction. Many small administrative and organizational units have records that do not fit clearly into either the "destroy" or "save" category. These should be looked over by a competent person before they are destroyed. This review may result in all or almost all of

the material being destroyed; but there may be some that is worth keeping. This review is time consuming and costly; but it will insure the preservation of stray items that could easily be thrown away.

The schedule may do other things. It may, for example, provide for the security protection of essential records; and it may even go so far as to provide for reorganizing the files in such a way that a reasonable retention period may be more readily applied. But the schedule should provide for the disposition of all records, regardless of whether that disposition is preservation in an archives, destruction, storage prior to destruction or transfer to an archives, or micro-filming. Unless the schedule does all of these, the archives may become a dumping ground and it may prove virtually impossible to obtain transfers of future accumulations of valuable records.

After the schedule has been drafted, it should be discussed with the persons whose records are concerned. In these discussions, it should be remembered that many people have an exaggerated idea of the value of their records and may be defensive about them. In addition, many of the immediate custodians of records neither see nor understand the relationship of their records to others. Usually, the persons immediately responsible for records are conservative in their estimation of the period of time after which they can be disposed of. It is better, however, to accept what may seem to be an unduly long time with the hope that it can be shortened later than it is to risk antagonizing someone who may block the entire program.

The schedule should be approved before it is put into effect. This approval should come from the highest possible authority—the dean of a school, the president or chancellor of a college or university, the head of an agency. And, if the schedule applies to a state college or university, there may be legal requirements for approval as well.

In North Carolina, the state colleges and the University of North Carolina have the same status as government agencies. Two of these have been scheduled in the manner already described. Because it might be years before the other institutions are scheduled, the Department of Archives and History developed a standard which contains suggested retention and disposition periods for major records series. This College and University Records Retention and Disposition Schedule is intended to serve as a guide to their disposition. It schedules not only for destruction, it schedules for retention and for transfers to the college archives. It also suggests microfilming for the security protection of essential records. By implication, it suggests what records should be created.

The schedule is the keystone in records disposition. Without a plan, transfers to the archives and the destruction of obsolete material

are haphazard, and, in all probability, material will be saved that should be thrown away and material will be thrown away that should be saved.

But assuming that the schedule is prepared and approved and is placed in operation, what comes next? In many instances—nothing! Many “records management” programs get to the point that they handle disposition effectively, and there they stop.

Although records disposition may eliminate accumulation of obsolete records promptly, identify and insure the preservation of records with permanent values, and save equipment and space, it does not really solve many records problems. It does not improve the quality of the records, for example, nor does it stop the creation of unnecessary records; it neither makes the recorded information more readily available nor does it simplify the procedures that result in the creation and processing of records. Records management includes a great deal more than records disposition, but with records disposition as the point of departure it is possible to go into some of the more sophisticated techniques that have been developed to manage records and paper work effectively.

The schedule can be the initial step that will lead to effective management of the total life cycle of records. After it has been approved, the persons who apply it find that the manner in which the material is filed rather than the provisions of a schedule control the disposition of it. And if a lot of transitory material is filed with material of more enduring value, it will all be kept for the longer period of time. So the next logical step is into the files maintenance area.

One of the major problems with filing is that most of it is done by persons who were hired because of their competence in some other activity. Most filing is done by persons who were employed because they were good stenographers, good typists, or good something else. And if filing is the major duty of an employee, that employee is probably among the lowest paid. It is little wonder, then, that files and filing represent a major records problem. Not only are filing systems inefficient, but widely scattered duplicate files tend to fragment information and waste filing and finding time.

Files are usually arranged numerically, alphabetically, or by some classification system. Numerical files are those which are arranged according to a preassigned number or by a number that is arbitrarily assigned to identify the document or documents. Numerically arranged files are simple and are easily expandable. Their principal drawback is that numbers usually have no relation to the subject or the name of the material filed, with the result that a numerical file almost universally requires an index of some type. Alphabetical files are usually name files and are arranged by name

regardless of whether they relate to person, place, or thing. They are simple, but they may be difficult to expand because it is not always possible to anticipate within what letter of the alphabet additional material may belong. Some efforts have been made to combine numerical and alphabetical files, but the combinations usually have the drawbacks of both and the advantages of neither.

The third way in which files may be arranged is in some rational order based on the relation of documents and of subjects to each other. This type of arrangement usually involves a classification scheme or system; this is the manner in which subject material is usually arranged. Some classification systems are numerical; the decimal system is perhaps the best known of the numerical classification schemes. Some systems are alphabetical, or they may be combinations of the two. The classification system should, however, bring together documents relating to the same matter or to the same subject. Classifications systems, therefore, are usually used to file so-called subject material.

The system by which subject material is arranged should be simple, flexible, and expansible. It should also be set up in such a way that material of the same or a related subject is brought together. The most simple subject file system is an alphabetical arrangement of subjects in which one folder has no direct relation to the folders preceding or following it. For example, there may be succeeding folders that would be labeled "Annual Reports," "Applications for Employment," and "Automobile Maintenance and Repairs." With a file arranged in this manner, there is also a tendency to file organizationally; that is, to file by the name of the correspondent or the office with which correspondence is exchanged. With material filed in this manner, related subjects may be widely separated; the organizational folders may include material relating to many different subjects; and the relationships of subjects to each other may be completely obscured. Such a system is readily expansible, because there is no end to the number of different subjects that may be inserted into proper alphabetical order.

The best known numerical arrangement for subject material is the Dewey Decimal System. This system is predicated on the assumption that all filed material can be organized into ten major subjects; that each major subject can be divided into ten subdivisions; and so on ad infinitum. Subjects, therefore, are assigned numbers, each digit of which indicates a subject or subdivision thereof. The most serious defect of this type of system is that it is limited to tens—that it is, in other words, not sufficiently flexible. It also has the defect of requiring an index; virtually nothing can be retrieved from it without first consulting an index to determine in which folder search should begin.

There are combinations of alphabetical and numerical schemes in such systems as an alpha-numeric file. The best known file of this type was the Navy Filing System, in which major subjects were assigned letter designators which generally coincided with the first letter of the subject—"A" for Administration and "S" for Supplies, for example. The principal subdivisions were then assigned numbers in sequence, and these subdivisions were then subdivided by numbers in sequence. A file designation in an alpha-numeric system, then, would appear as "A6-6," meaning, in this case "records disposition" as an administrative technique. A system of this type also requires an index, and its expansibility is limited by the number of letters in the alphabet. In addition, two or more major subjects may begin with the same letter—for example, "Administration" and "Aviation"—which require adjustments in the letter designators.

Another refinement of the combined alphabetical and numerical systems is the so-called subject-numeric system in which subject names are used as designators and numbers are assigned to subdivisions. For example, a major subject would be identified as "PERSONNEL;" the major subject then would be subdivided and the subdivisions could then be further divided. These subdivisions are assigned identifying numbers; "PERSONNEL 6" for example, may mean "Employee Relations" and "PERSONNEL 6-2" may mean "Grievances." These designators may be further refined by abbreviating the major heading to, for example, "PERS" with the complete file designator written "PERS 6-6." A system such as the subject-numeric system is simple, flexible, and expandible; subjects can be added, for example, without limit. Its major drawback, however, is the fact that numbers are associated with it and an extensive scheme requires an index for maximum utility.

The most easily used classification system is the so-called self indexing subject system which is similar to other classification systems except that numbers are not used as designators. Major subjects are established; these are then subdivided and the subdivisions are further divided. The names of the subdivisions are used, however, rather than a number. Since the number of major subjects is usually relatively small, a file arranged according to this system can be searched directly from the folder labels without reference to an index first.

Whatever kind of classification system is used, the fact remains that the system provides nothing more than a framework according to which papers and documents are arranged. Whether the system is elaborate or simple, the most important single operation in regard to filing is deciding to which subject a particular document relates. This decision-making is called classifying—deciding under what subject a document shall be placed. Various systems have weaknesses; but the major problems with any system result

from human failure in deciding where something shall be filed. Whatever system is used, it should be tailored to the particular needs that it is intended to meet. An elaborate decimal system would be senseless in a subject file that occupies half a drawer; a simple subject system arranged alphabetically would be useless in a file that occupies 200 file cabinets. An organizational file may be the simplest when the relationships between subjects are not elaborate and most of the correspondence is exchanged with a few persons or organizations.

There is no "best" system except the one that best fits a particular situation. But this does not prevent the person who is responsible for files from doing the things that indicate they are well managed: drawers properly labeled; folders labeled and the folder tabs in proper order to show the nature of the subject it holds; folders not bulging; files broken so that only current material is in current files; guides properly used; out cards or charge-outs properly used. Any one of these is small; in the aggregate, however, they make the difference between good and poor management.

Although a records management program may begin with records disposition, it is soon found that decisions made in filing and files maintenance have the greatest effect on the disposition of records. Records management then progresses to the filing area, and here it soon finds that decisions that were made when the records were created have the greatest effect on the way that files are set up and maintained. The number of copies of a letter, for example, and the number of different subjects in a letter affect the way in which it is filed; the manner in which reports are authorized, prepared, and submitted have an impact on the files; and the way in which records and paper work pass through an office or series of offices may determine whether the transaction is documented properly or whether it is fragmented.

Records are usually created as correspondence, forms, and reports. They are created, in other words, as communications from one place or one person to another; as information that is organized in a particular way or for a particular purpose; and as organized information that is transmitted from one person or place to another. Obviously, reports can be made as letters in a narrative style or as organized data on a form. Since most of the money spent on records is spent in creating them, the need for work in the records creation area of records management is obvious.

Letters, generally, may be hard to read and to understand because they are too long. The savings that result from shortening a single letter by one-quarter would be minimal; but on as few as 100 letters a year they would be substantial. When a letter is shortened, there should be no reduction in the thought content; rather the excess and unneeded words should be cut out. Letters are costly, also, be-

cause many people who write letters find them hard to write. And many of the people who find it a chore to write a letter feel that the two or three letters they produce each day should each be a masterpiece of erudition. Letters should be simple—they are usually written to answer a question or to ask or tell a person something. They should be written in words that people understand—in picture words rather than abstractions.

Many repetitive letters can be printed and used as form letters. To be effective, a form letter should have a minimum of fill-ins and the fill-ins should be located so that they can be completed without difficulty. Form letters should be used if they deal with routine business or informational matters; they should not be used for personal letters and for letters that contain a message that brings grief or disappointment to the reader. A form letter with ten lines is economical if it is used at least twenty times a month; fifteen lines fifteen times a month; twenty or more lines ten times a month. The economy of a form letter, then, is measured in terms of the number of lines and the number of times used per month.

If a letter is not used enough times for it to be economical to be printed, it may be possible to use a pre-written pattern or guide letter. A letter of this type is written in advance of use, fits a particular situation, and may be prepared by a typist who has been instructed to write a particular letter. The principal advantages of form and pattern letters is that they are well written, they contain only necessary information and avoid excess verbiage, and they can be written and mailed promptly.

Just as it is possible to manage correspondence, so is it possible to manage forms. The goal of forms management, however, is somewhat different; its aim is to eliminate unnecessary forms, combine forms that are similar, and to simplify necessary forms so that they can be filled out more easily. In order to have a forms control program, particularly if the number of forms is not large, it is not necessary to assemble samples of all forms and then to classify them into functions. With a large number of forms, a functional file will certainly bring together forms that perform a like or common function. The most effective way to control forms, however, is to review them in the context of the procedural operation that uses them. Too frequently, a procedure is designed to fit forms that are already in use; actually, the forms should fit the procedure.

A great deal of attention has been paid to the proper design of forms, and this should be considered as a part of the effective management of forms. C. Northcote Parkinson in his scholarly discussion of Parkinson's Law describes forms design in these words: "The art of devising forms to be filled in depends on three elements: obscurity, lack of space, and the heaviest penalties for failure. In a

form-compiling department, obscurity is ensured by various branches dealing respectively with ambiguity, irrelevance, and jargon."¹ Many forms seem to meet these standards, but they need not. Most forms are now filled in by typewriter and the form should be designed so that the lines conform to machine spacing and the entries should be lined up so that they can be made with a minimum number of tab stops. Design standards may be simple, and a properly designed form can be filled in in a fraction of the time required to fill in a poorly designed form—and clerical time costs money.

Reports are a paper work burden. The reporting pattern resembles an inverted pyramid: at the top are many separate offices each requiring only one or two relatively simple reports; and all of these zero in on a single office at the bottom of the heap which is faced with the gigantic task of preparing dozens of reports. Reports duplicate each other—the same or substantially the same information is reported to more than one place; they are made too frequently—often at a frequency which has no relation to the reported data; they cost too much—if a report costs several thousand dollars to prepare it may not be worth the cost of preparing it.

There are many different techniques by which the creation of records can be managed or controlled. There are formal, conventional control programs. Records can also be managed through what has been called a systems approach—that is, a review of procedures which will automatically result in review of the paper work that accompanies them. Streamlining of the procedure will automatically streamline the accompanying paper work. But whatever management technique is used, the fact remains that the creation of records must be managed or paper work will completely overwhelm the operations it is supposed to assist.

Why should an archivist be concerned with the management of current records? Why should the custodian of historical documents be concerned about techniques for controlling the creation of records? The archivist is concerned with permanently valuable records—not only of the past but of the present. The archives of the future are being created and filed right now; if the archivist does not protect his interests in the permanently valuable material during its creation, maintenance, and eventual disposition, he must be satisfied with whatever manages to survive. If he participates actively in the creation, maintenance, and disposition of all records, he will protect his interest in the relatively small percentage that comprises permanent documentation.

Too frequently, the archivist has been pushed aside while the records manager practices his trade upon the records with which the archivist will eventually be concerned. Then, when all decisions have been made and the records have been created, filed, and finally disposed of, the remnant passes to the archivist.

The archivist, then, has a dual responsibility. First, he must preserve the historical heritage of the institution which he serves; second, he must insure that the documentation of that heritage is of the highest possible quality. The latter is possible only through the proper management of records and paper work. Many an archivist may feel that he is above the mundane problems of administration and management which appear to be the special province of records management. Unless he injects himself into these areas, however, the archivist will find that he has less and less influence over the activities with which he is specially concerned. Today the archivist can no longer function in his ivory tower; to be effective, he has no alternative but to participate actively and aggressively in the management of the material from which the items comprising his "archives" come.

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