



## Adding New Boxes and Files to Your Offsite Inventory

*To add your new boxes and files to the Meyer Records Management (MRM) inventory please do the following:*

**Step 1:** Go to <https://recordsmgmt.meyerinc.com/> and log in with your username and password. If you forgot your USERNAME and PASSWORD, contact the University Records Manager at [mdelloiacono@suffolk.edu](mailto:mdelloiacono@suffolk.edu) or x6255.


**Step 2:** Click on the ADD button on the top menu, then select BOX from the drop-down menu. The CUSTOMER, DEPARTMENT, and REQUESTED BY fields should be automatically filled out.

**Step 3:** Select appropriate department from the drop-down menu if applicable.

- i. Fill in the complete container bar code number in the ITEM CODE field. Note: Be sure to place the container bar code label **below** the handle on the end of the box. **PLEASE DO NOT** place labels above the handle, on lids, or on the sides of the boxes. (NOTE: Barcodes, boxes and labels can be ordered by clicking on the SERVICE/MATERIAL button on the top menu, or by contacting the [University Records Manager](#).)
- ii. Fill in the fields with the appropriate descriptive data
  - To move through the fields, simply press your tab key. Press and hold the shift key and press the tab key to move backwards.
  - Make sure you have a thorough understanding of which fields your manager expects to be utilized. It is important that all data entry be entered in a consistent manner and completed as thoroughly as possible to aid retrieval and destruction.
- iii. Calculate and enter the EXPIRE DATE. This is the date this box will be targeted for destruction review. You will need to refer to your organization's retention schedule to calculate. Meyer will never destroy boxes without permission, this date is for your review and action.
- iv. After you have entered all of your information for that box, click ADD. Note: To make the data entry easier for repetitive text, check off RETAIN DATA ENTERED ON ADD to leave the text in all fields for the next box to be added.



*To index or itemize each file within your boxes do the following:*

**Step 4:** Search for the specific box that you want to index file to. Then click on the ADD ITEM TO PARENT icon. It is the icon that looks like a blue file folder. 

- i. Select FILE from the ITEM TYPES drop-down menu. If your account has more than one type of file setup for your account, make sure you select the correct file type.
- ii. Make sure you select correct DEPARTMENT from the drop-down menu if applicable.
- iii. Fill in the fields with the appropriate descriptive data.
- iv. Enter the START and END dates if needed. These are the oldest and most recent dates of the box contents. This is useful for determining if retention periods have been met.
- v. **Important:** Once you have completed your data entry for these files, click SAVE. You will automatically be brought to the window where you will see all of the boxes and files that you have added during this session. NOTE: You can add boxes and files over the course of several days. They will be saved in your online account until you submit your order.

**Step 5:** After reviewing this information click SEND ORDER to proceed.

**Step 6:** Select NEXT DAY PICK UP (ACCESSIONS) from the SELECT DELIVERY PRIORITY drop-down menu. Please note orders submitted by 4PM are guaranteed for next day pick up. Orders received after 4PM may take an additional day.

**Step 7:** Select the appropriate DEPARTMENT.

**Step 8:** Please use the COMMENTS section to specify any special order instructions. You may also use this section for internal notes regarding this order. This note will print on the Work Order that accompanies your delivery.

**Step 9:** To finalize your work order click COMPLETE SEND ORDER button. You will then see our confirmation that your order has been received. You can print this page for your records. You could also click on the VIEW WORK ORDER LINE REPORT IN PDF FORMAT button for a printable line-by-line listing of the order.



This completes the process for adding boxes and files online and Meyer's Customer Service Staff will process your order promptly.