



Guide No. 4 Creation to curation of records

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This handout provides guidance on how to create reliable records of Area and Local Meetings and committees. It covers both paper and electronic records. Further information about electronic records can also be found in *Guide No. 6 Electronic records*.

Summary of guidance

- Select the appropriate paper for record creation, consider how long the record will be kept and what sort of use it is likely to have.
- Use archival quality paper for archives (permanent records).
- If records are kept in manuscript, use good permanent black ink.
- If labelling or marking records with page numbers, use a 2B pencil.
- Records should be clearly labelled.
- Paper and electronic records should be kept in an orderly way. Create understandable and easy to use filing systems for records.
- Minute books should have an ownership label in the front of the volume.
- For printing records, avoid ink jet printers using dye-based ink. Use a laser printer and print onto archival quality paper. Keep a generous left-hand margin, perhaps for later binding.

1. Paper

Until the mid-19th century, paper in Europe and North America was made from rags and was comparatively strong and durable. This is why so many Quaker records of the 17th and 18th centuries have survived so well. Being made of rags, the paper contained few impurities and had long fibres which made it strong.

Modern papers are made largely with wood pulp which contains lignin, an impurity that causes acid to form in paper and to discolour and disintegrate. The fibres of wood pulp are short and so the paper is not as strong as long fibre papers. Recycled and thermal papers also have a limited lifespan.

Using archival quality paper is important when creating records that need to be retained long-term or permanently, i.e. archives (see *Guide No. 2 Meetings' records and their retention and disposal* and *Guide No. 5 Minutes and supporting papers*). Records of short-term value and ephemeral documents can be produced on low quality paper. To select the right paper for record creation, consider both how long the record will be kept and what sort of use it is likely to have.

a. Archival quality paper

In relation to paper, permanence means the paper has the ability to remain chemically and physically stable over long periods of time. **Archival quality** or **permanent papers** will therefore undergo little or no change during long-term storage in a stable and protected environment.

Archival paper is lignin-free and has been formulated to have both chemical and physical properties that counter the influence of acids in the environment and combats acid degradation. Archival paper will not discolour or disintegrate with normal usage. The paper is made from cotton or fully bleached chemical wood to give it physical strength. It is guaranteed not to become acidic.

'Acid-free' or 'pH neutral' papers are not the same as archival quality paper. Acid-free or pH-neutral means the paper had a neutral pH when it was manufactured, but has not necessarily been treated to stabilise it over a period of time or to protect it from the influence of acids in the environment. For example, if an acid-free sheet of paper is filed alongside a standard sheet of paper then eventually it will pick up the acidity from the standard sheet. Absence of acid in a paper does not guarantee it will stay that way.

There are two international standards that apply to archival quality paper:

- *ISO 9706:1994 Information and documentation - Paper for documents – Requirements for permanence,*
- *ISO 11108:1996 Information and Documentation – Archival paper – Requirements for permanence and durability.*

If a paper is accredited with either of these standards then it is suitable for records that need to be kept long-term and for archives.

Archival quality paper is more expensive than standard paper. In the long-term though the cost of preserving records on these papers will be significantly less than those created on less durable paper, which are likely to deteriorate within a few years. Meetings may wish to consider sharing costs by sharing supplies with other meetings.

Good local stationers may be able to supply archival paper. For UK papermakers, see *Guide 12 Records equipment and suppliers*.

b. Recycled paper

Many Friends wish to use recycled paper as far as possible, and it is an environmentally appropriate choice. However, it should not be used for archives or for records which need to be kept long-term. Recycled paper is very weak and it likely to deteriorate within 10 years because of the processes used and because it is made from recycled materials. Recycled paper should only be used for publications or documents that will *not* be kept long-term or permanently.

c. Thermal paper

In the past, thermal paper was used for document copying methods such as spirit duplication and Photostat and in fax machines. Very few copying methods or fax machines use thermal paper now. Any records on thermal paper that need to be kept permanently or for some length of time should be copied onto archival quality paper. It deteriorates rapidly, with the text beginning to fade within a few months and the overall darkening of the paper.

d. Coloured paper

Most coloured papers are not of sufficiently high quality for archives or for records which need to be kept long-term. It is also difficult to make reproductions from records on coloured paper.

e. Types of paper and their recommend use

Types of paper and their recommended use	
Type of paper	Recommended use
Archival quality paper	Minutes and indexes Archives (Permanent records)
Standard grade paper	Records that will be kept for less than 30 years Copying papers that are going to be circulated
Recycled paper	Records that will be kept for less than 10 years Rough minutes Copying papers that are going to be circulated

Thermal paper	Not recommend for records or archives (permanent records)
Coloured paper	Not recommend for records or archives (permanent records)

2. Writing/Typing tools

a. Ink

There are recommended inks for specific and limited purposes. If minutes and other records are kept in manuscript, it is best to use a fountain pen with a good permanent black ink or to use Archival pens which use archival ink (see *Guide 12 Records equipment and suppliers*)

Felt-tip, roller-ball, ball point or gel ink pens are not suitable for archives; they will start to fade immediately and most are not waterproof. Minutes written in hand should of course be legible to all and not just to the writer.

b. Pencils

If needing to mark records with a pencil, such as for labelling or for pagination, use a soft pencil, such as 2B. Write in an unimportant area and do not press hard enough to create indentations. To rub away pencil marks use a plastic eraser, such as Mars Staedtler™.

c. Computers, printers and photocopiers

The durability of photocopied and laser-printed documents depends largely on the quality of the paper used, as well as the degree to which the paper and toner adhere. Copiers using toners composed of stable resin materials and a stable pigment such as carbon black and printed onto archival quality papers can be considered permanent and suitable for long-term retention. Laser printers using archival quality papers are acceptable for archives and permanent records, as are dot matrix printers, using appropriate ink.

Most ink jet printers use dye based ink, and copies produced on these printers tend to fade. It is strongly recommended not to use a thermal printer (although there are very few in existence). The text disappears from the page rapidly and is not suitable for archiving purposes. For further information about electronic records, see the section below on *Filing electronic records* and *Guide No. 6 Electronic records*.

d. Typewriters

Some meetings may still use typewriters for creating records. Manual or electric typewriters will use either fabric ribbons or carbon ribbons, or ink-jet and laser printers. For all, the ink quality is crucial. Pigment based inks are more permanent than dye-based.

Some documents typed in the early 20th century using a fabric ribbon are still perfectly legible, and seem to have suffered no deterioration. Records produced with carbon ribbon, using daisy-wheel or golf-ball or type-basket technology may provide a sharp text and reproduce well when copied; but the characters may 'lift off' and disappear from the page.

3. Filing systems

Filing systems provide a framework for organising a meeting's work. They help meetings to find the information you require quickly and easily. They preserve the context within which records are created, i.e. instead of dealing with separate sheets of paper, filing systems create a coherent set of papers derived from a particular activity.

Meetings are responsible for developing filing systems that reflect their work. Filing systems should be understandable, not just by the individual who created the file, but by colleagues, and should be easy to use; it should be obvious where to file papers and where to locate information.

a. Filing paper records

The following guidance will help you to manage your paper filing system:

- File covers should be sturdy and secure.
- Papers within files should be retained in chronological order, with the earliest paper at the back of the file, working to the most recent at the front, except minute books which should be filed or bound book style, i.e. earliest at the front of the minute book.
- Place only one master copy of a paper on file.
- Try not to file unnecessary copies of papers which can be accessed elsewhere.
- Mark files with their 'Review' or 'Destroy' dates or add 'Permanent' for archives. For further information about records retention, see *Guide No. 2 Meetings' records and their retention and disposal*.
- When a file becomes full, close it. Open a new file and refer to the older file on the cover. This avoids papers being damaged or lost.
- Day-to-Day work should be kept on desks. Once complete, papers should be placed in the relevant file in the filing system.
- Confidential and sensitive records should be kept in locked filing cabinets.

b. Filing electronic records

Records created electronically should be stored in an electronic filing system which mirrors the system in place for paper records. The system of folders, sub-folders and files which exists in the paper system can be easily transferred into an electronic system.

Confidential and sensitive records should be kept securely. For further information about electronic records, see *Guide No. 6 Electronic records*. The guide provides advice on how to organise, name and manage electronic files.

4. Labelling

All records (whether files or volumes) should be clearly labelled showing:

- Name of meeting or committee
- Nature of records
- Dates the records cover
- Retention instructions

For example:

Devonshire House & Tottenham Monthly Meeting: Apprenticeship
Committee
Minutes
1882 (Nov) – 1960 (Jan)
Keep permanently

As a security measure, minute books should have an ownership label in the front of the volume from the outset, so that it is clear it is the property of a meeting of the Religious Society of Friends. This will help guard against records falling out of custody of the meeting in the future (for further information, see *Guide No. 5 Minutes and supporting papers*).

5. Storage

Storage of records is covered in a separate guide. See *Guide No. 7 Preservation and storage of records and archives*.

6. Further advice

For further advice on managing records and archives you can either write to Friends House Library, Euston Road, London NW1 2BJ, telephone 020 7663 1135 or send an email to library@quaker.org.uk

Guides in this series

- Guide No. 1 The job of the Custodian of Records
- Guide No. 2 Meetings' records and their retention and disposal
- Guide No. 3 Legislation affecting records and record-keeping
- Guide No. 4 Creation to curation of records
- Guide No. 5 Minutes and supporting papers
- Guide No. 6 Electronic records
- Guide No. 7 Preservation and storage of records and archives
- Guide No. 8 Use and access to records and archives
- Guide No. 9 Depositing archives with appropriate repositories

Guide No. 10 Disaster preparedness
Guide No. 11 Creating exhibitions and displays
Guide No. 12 Records equipment and suppliers
Guide No. 13 Glossary
Guide No. 14 Frequently Asked Questions

All guides can be downloaded from the Britain Yearly Meeting website www.quaker.org.uk/Library on the Support for Meetings page or requested from the Library.

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