

Instructions for Transmittal Spreadsheet

There are three Worksheets in the Excel Workbook, SRCtransmittal.xls.

‘DATA’, ‘LABEL’, ‘TRANS’.

DATA holds the variable data for a transmittal

LABEL is the form which will print box labels. TRANS will print the Transmittal sheet.

1. Download and save the workbook

a. Under the ‘DATA’ tab enter the following information which is constant for your agency:

Agency Name - Cell D4

Agency Address - Cells D5 & D6

Name of Agency Records Officer – cell D8

Telephone Number – cell D9

Transferred by name – cell D10

Telephone Number – cell D11

b. This workbook will be your agency’s sample form. Save it.

2. To enter a transmittal, start on the 'DATA' tab. All information entered here will be printed on both the labels and transmittal sheets

a. Enter all pertinent data listed in column D or J as indicated

b. Enter the information in the body of the form for individual boxes

– Inclusive dates, and beginning and ending file.

c. The reference # column is optional - for the use of the agency in-house number.

This field will not print

3. 'LABEL' tab: no entries are necessary here. You will need to obtain blank labels from the State Records Center. There are four labels to a page. Printing pages 1 thru 4 will print labels for 16 boxes

4. 'TRANS' tab: Again no entries necessary here. Print as many transmittal sheets as necessary.

5. Before printing, review on the screen – in case fields have been truncated, etc. Verify how many pages need to be printed and only print those many. (4 labels to a page)

6. Save the file until the transmittal has been completed

7. E-mail it to SRC@scdah.state.sc.us.

This spreadsheet is formatted for 60 boxes; however, you can expand the file to more boxes

Hints:

Do not enter an agency name longer than 40 characters

Don't use the TAB key! Use the mouse or arrow keys to move around the spreadsheet

You will need to change the number of pages of the transmittal sheet in cell C1.

There is a glue side to the labels - print on the other side!

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