



Finalizing the Tufts University Transfer Agreement Form *Archivist Guide* September 2011

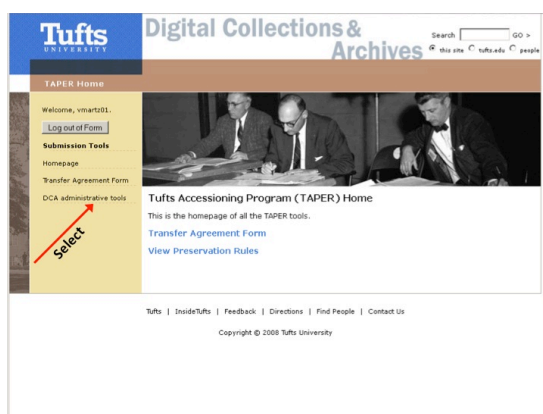
Introduction

This guide provides archivists with instructions on finalizing a transfer agreement form in the submission agreement builder tool. The builder tool code is available at <http://tutaper.svn.sourceforge.net/viewvc/tutaper/>.



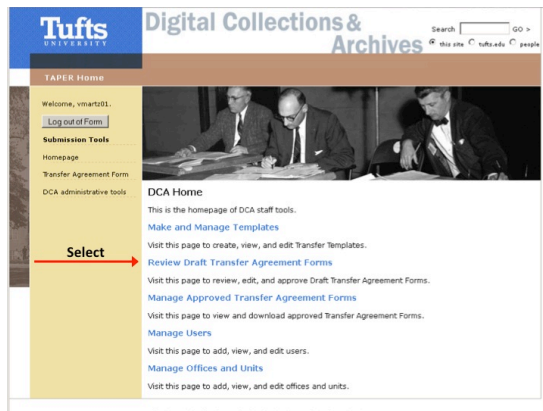
Step 1

In these instructions, we will walk through the steps for finalizing a transfer after a form has been submitted by the Records Producer.



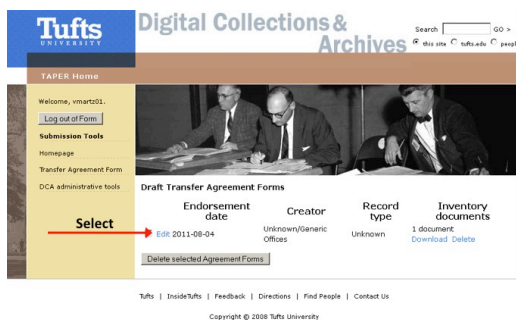
Step 2

Once we are signed into the tool, we begin by selecting the administrative tools link.



Step 3

Then we select “Review Draft Transfer Agreement Forms.”



Step 4

We are presented with a list of Draft Transfer Agreement Forms. On this page, we have the option to review any inventory documentation that may be attached to the form. For our purposes we will focus on editing the form by selecting the “Edit” text at the beginning of our listing.



Step 5

The first series of fields reflect the information provided by the records producer. SIP creation and transfer refers to any actions the producer took in preparing the materials for transfer. Generally, a quick review is all that is needed.



Records creator records
 For each records creator, supply a descriptive name, an ID string, and/or an email address.

Name [Unknown/Generic Offices]
 ID []
 Email []

Records producer records
 For each records producer, supply a descriptive name, an ID string, and/or an email address.

Name [Veronica A Martzaki]
 ID []
 Email [Veronica.Martzaki@tufts.edu]

Archive endorsement
 2010 [] August [] 9 []

Record type record
 []
 Copyrights []
 Tufts University []

Access
 Restricted []

SIP transfer drop box URL
 http://dcaonline.tufts.edu/rythosmf/webview_ry1163126_1

Transfer date
 Year [] Month [] Day []

Optional fields

Step 6

As we move down the form, it may be appropriate to change or expand some of the information provider. For example, in some cases the form is filled out by DCA staff and the producer information reflects the archives staff member, not the actual producer since this information is derived by the initial login information. We have the option of correcting that information here. We can also provide more detailed record type information and make changes to the copyright or access information.

Access
 Restricted []

SIP transfer drop box URL
 http://dcaonline.tufts.edu/rythosmf/webview_ry1163126_1

Transfer date
 Year [] Month [] Day []

Optional fields

Activation
 2010 [] August [] 9 []

Expiration
 Year [] Month [] Day []

Retention alert date
 Year [] Month [] Day []

Transfer notes
 Boxes in a leaky shed

Recordkeeping systems
 Not applicable []

Arrangement and naming schemes
 Not arranged []

Warrants to collect
 University Records Policy []

Accession number

Enter date

Step 7

The first field that required action is the Transfer date in which we enter the actual date the materials arrive at the DCA offices.

Recordkeeping systems
 Not applicable []

Arrangement and naming schemes
 Not arranged []

Warrants to collect
 University Records Policy []

Accession number
 []

Activity log numbers
 2011 029 []

Survey report IDs
 []

Retention periods
 Permanent []

Preservation Rules
 Preservation Rule []

Archival description standards
 DACS []

Respect de fonds
 []

Enter number

Step 8

Below that, we have the option to add an accession number as well as additional Records Management job tracking numbers.



University Records Policy

Accession number

Activity log numbers
0011 029

Survey report IDs

Retention periods
Permanent

Preservation Rules
- Preservation Rule -

Archival description standards
- Archival description standards -

RSA Status
 Draft
 Final

[Update this Transfer Agreement](#)

Step 9

We are also able to define what preservation activities we will be performing on the materials based on the series of rules we have developed. This is a repeatable field.

University Records Policy

Accession number

Activity log numbers
0011 029

Survey report IDs

Retention periods
Permanent

Preservation Rules
- Preservation Rule -

Archival description standards
DACS

Respect de fonds

RSA Status
 Draft
 Final

[Update this Transfer Agreement](#)

Step 10

Finally, we click the radio button from draft to final and select “Update the Transfer Agreement” which moves it from the draft queue into the approved area. At this point no further action is needed.

Select →

Tufts UNIVERSITY Digital Collections & Archives

TAPER Home

Welcome, vmart01

[Log out of Form](#)

Submission Tools

Homepage

Transfer Agreement Form

DCA administrative tools

DCA Home

This is the homepage of DCA staff tools.

[Make and Manage Templates](#)
Visit this page to create, view, and edit Transfer Templates.

[Review Draft Transfer Agreement Forms](#)
Visit this page to review, edit, and approve Draft Transfer Agreement Forms.

[Manage Approved Transfer Agreement Forms](#)
Visit this page to view and download approved Transfer Agreement Forms.

[Manage Users](#)
Visit this page to add, view, and edit users.

[Manage Offices and Units](#)
Visit this page to add, view, and edit offices and units.

Step 11

In order to look at other features of the tool, return to the DCA administrative tools home page and select manage approved transfer agreement forms

Select →



Tufts UNIVERSITY Digital Collections & Archives

Search GO

Home

Welcome, vmar201

Log out of Form

Submission Tools

Homepage

Transfer Agreement Form

DCA administrative tools

Approved Transfer Agreement Forms

Endorsement date	Creator	Record type	Inventory documents
<input type="checkbox"/> Edit: 2011-08-04	Unknown/Genetic Offices	Unknown	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-29	Tisch Library	Exhibit records	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-29	Office of Special Events - UA	Event files	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-27	Tisch Library	Exhibit records	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-27	Center for Environmental Management	Slides, photos and clippings	9 documents Download Delete
<input type="checkbox"/> Edit: 2011-07-27	Dean of Arts and Sciences	Office records	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-20	Digital Collections and Archives	Office Files	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-15	Lawrence Baow	General Records	1 document Download Delete
<input type="checkbox"/> Edit: 2011-07-15	Fletcher School	General	1 document Download Delete

Step 12

Here we can perform additional document edits if necessary and access the inventory document.

<input type="checkbox"/> Edit: 2010-07-07	Office of Educational Affairs, Medical School	Syllabi	1 document Download Delete
<input type="checkbox"/> Edit: 2010-07-06	Hurant Sherman Santorian	General	1 document Download Delete
<input type="checkbox"/> Edit: 2010-07-06	Office of the University Provost and Senior Vice President	General	1 document Download Delete
<input type="checkbox"/> Edit: 2010-07-02	Ginn Library	General	1 document Download Delete
<input type="checkbox"/> Edit: 2010-06-29	Department of Athletics	General Records	1 document Download Delete
<input type="checkbox"/> Edit: 2010-06-29	Tufts University Alumni Association	General Records	1 document Download Delete
<input type="checkbox"/> Edit: 2010-06-25	Fletcher School	Website	1 document Download Delete
<input type="checkbox"/> Edit: 2010-06-15	Office of the Boards of Overseers	Minutes	1 document Download Delete
<input type="checkbox"/> Edit: 2010-06-11	Secretary of the Faculty	Hearing Agendas, Minutes, and Working Papers	1 document Download Delete
<input type="checkbox"/> Edit: 2010-05-28	Department of Mathematics	General	1 document Download Delete
<input type="checkbox"/> Edit: 2010-05-24	Center for Interdisciplinary Studies	General records	1 document Download Delete
<input type="checkbox"/> Edit: 2010-05-24	Pen, Paint, and Pretzels	General records	1 document Download Delete
<input type="checkbox"/> Edit: 2010-05-24	Coolidge-Dame Family papers	General records	1 document Download Delete
<input type="checkbox"/> Edit: 2010-05-04	Fletcher School	Website	1 document Download Delete
<input type="checkbox"/> Edit: 2010-04-29	Tisch Library	Exhibit records	1 document Download Delete
<input type="checkbox"/> Edit: 2010-04-29	Office of the Boards of Overseers	Minutes	1 document Download Delete

[Download selected Agreement Forms](#) | [Delete selected Agreement Forms](#)

Step 13

Additionally, we have the option to download agreement forms, or potentially delete them as necessary.

Project

214.xml

```

1 <?xml version="1.0"?>
2 <!-- @Copyright: 2011-08-04 -->
3 <!-- @Title: 2011-08-04 -->
4 <!-- @Description: 2011-08-04 -->
5 <!-- @Producer: 2011-08-04 -->
6 <!-- @RecordType: 2011-08-04 -->
7 <!-- @AccessionNumber: 2011-08-04 -->
8 <!-- @AccessionDate: 2011-08-04 -->
9 <!-- @AccessionDate: 2011-08-04 -->
10 <!-- @AccessionDate: 2011-08-04 -->
11 <!-- @AccessionDate: 2011-08-04 -->
12 <!-- @AccessionDate: 2011-08-04 -->
13 <!-- @AccessionDate: 2011-08-04 -->
14 <!-- @AccessionDate: 2011-08-04 -->
15 <!-- @AccessionDate: 2011-08-04 -->
16 <!-- @AccessionDate: 2011-08-04 -->
17 <!-- @AccessionDate: 2011-08-04 -->
18 <!-- @AccessionDate: 2011-08-04 -->
19 <!-- @AccessionDate: 2011-08-04 -->
20 <!-- @AccessionDate: 2011-08-04 -->
21 <!-- @AccessionDate: 2011-08-04 -->
22 <!-- @AccessionDate: 2011-08-04 -->
23 <!-- @AccessionDate: 2011-08-04 -->
24 <!-- @AccessionDate: 2011-08-04 -->
25 <!-- @AccessionDate: 2011-08-04 -->
26 <!-- @AccessionDate: 2011-08-04 -->
27 <!-- @AccessionDate: 2011-08-04 -->
28 <!-- @AccessionDate: 2011-08-04 -->
29 <!-- @AccessionDate: 2011-08-04 -->
30 <!-- @AccessionDate: 2011-08-04 -->
31 <!-- @AccessionDate: 2011-08-04 -->
32 <!-- @AccessionDate: 2011-08-04 -->
33 <!-- @AccessionDate: 2011-08-04 -->
34 <!-- @AccessionDate: 2011-08-04 -->
35 <!-- @AccessionDate: 2011-08-04 -->
36 <!-- @AccessionDate: 2011-08-04 -->
37 <!-- @AccessionDate: 2011-08-04 -->
38 <!-- @AccessionDate: 2011-08-04 -->

```

Step 14

If you chose to download a transfer agreement form, you will have an xml file that could be managed outside the submission tool.



Step 15

This completes the final part of our demonstration. We hope that you will find this a useful tool for streamlining your transfer and accessioning processes.



Step 16

If you have any questions or comments, please contact the Digital Collections and Archives at 617-627-3737 or at archives@tufts.edu.