



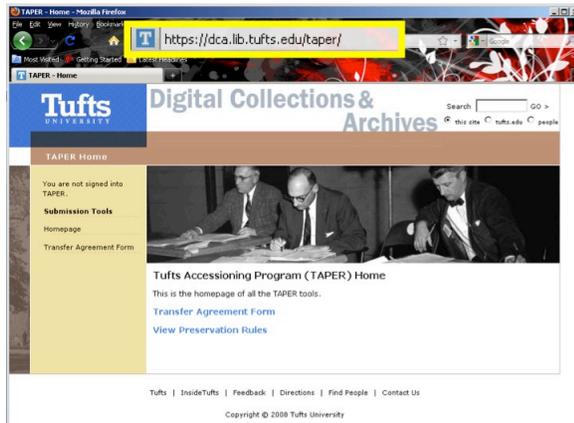
The Tufts University Transfer Agreement Form

User Guide

September 2011

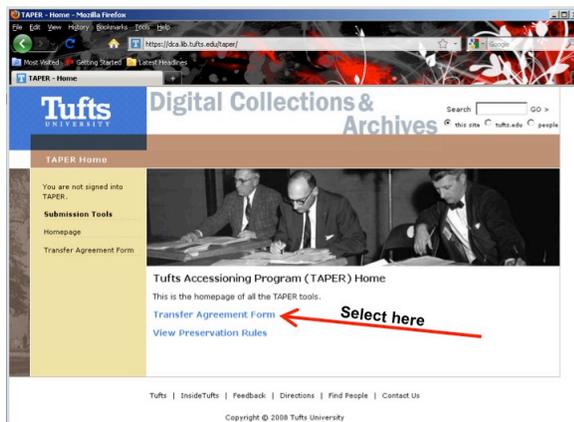
Introduction

This guide provides Tufts University employees with instructions on using the Transfer Agreement Form for transfer university records with enduring archival value from departments and offices to the Digital Collections and Archives (DCA). This user guide presumes that you have already talked with the DCA about transferring records. If you have not talked with the DCA (7-3737, archives@tufts.edu), please do that first. You cannot use the Transfer Agreement Form without have an initial conversation with the DCA.



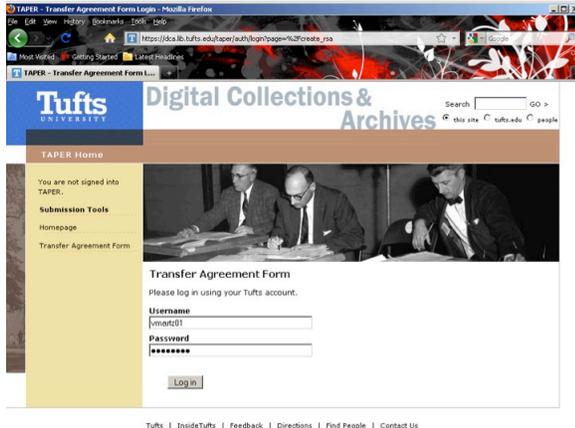
Step 1

Go to <http://dca.lib.tufts.edu/taper>



Step 2

Select the Transfer Agreement Form link.



Step 3

Sign in using your Tufts username and password.



Step 4

Then choose a transfer agreement form from the drop-down list. Your list will only show the transfer agreement forms you have permission to see.



Step 5

One you've made your selection, select the Transfer Agreement Form button.



Transfer Agreement Form

How have the records been prepared for transfer? (Check all that apply)

- Labelled Box(es)
- Labelled Folder(s)
- Created Inventory
- None

Extents

Number of units - Type of unit -

Format of the records (Check all that apply)

- Paper
- Photographic Prints
- Artifacts
- Analog Media (tapes, video, etc.)
- Digital

Date spans of the records

Beginning year Ending year

Step 6

You are now in the transfer agreement form.

Transfer Agreement Form

How have the records been prepared for transfer? (Check all that apply)

- Labelled Box(es)
- Labelled Folder(s)
- Created Inventory
- None

Extents

Number of units - Type of unit -

Format of the records (Check all that apply)

- Paper
- Photographic Prints
- Artifacts
- Analog Media (tapes, video, etc.)
- Digital

Date spans of the records

Beginning year Ending year

Arrangement, organizational and/or naming system

Alphabetical

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Step 7

Let us know if you have created an inventory or provided any labels.

Transfer Agreement Form

How have the records been prepared for transfer? (Check all that apply)

- Labelled Box(es)
- Labelled Folder(s)
- Created Inventory
- None

Extents

Number of units - Type of unit -

Format of the records (Check all that apply)

- Paper
- Photographic Prints
- Analog Media (tapes, video, etc.)
- Digital

Date spans of the records

Beginning year Ending year

Arrangement, organizational and/or naming system

Alphabetical

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Step 8

Next select the container type you are sending from the dropdown list, and enter the quantity you are sending.



Homepage
Transfer Agreement Form
DCA administrative tools

Transfer Agreement Form

How have the records been prepared for transfer? (Check all that apply)

Labelled Box(es)
 Labelled Folder(s)
 Created Inventory
 None

Extents

Number of units: 10 [Box] **Select the box to add additional types of materials**

Format of the records (Check all that apply)

Paper
 Photographic prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital

Date spans of the records

Beginning year: [] Ending year: []

Arrangement, organizational and/or naming system

[Alphabetical]

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Step 9

If you have multiple container types, add an additional line by selecting the plus sign.

Homepage
Transfer Agreement Form
DCA administrative tools

Transfer Agreement Form

How have the records been prepared for transfer? (Check all that apply)

Labelled Box(es)
 Labelled Folder(s)
 Created Inventory
 None

Extents

Number of units: 10 [Box] **+**
 Number of units: 5 [Other] Type of unit: []

Format of the records (Check all that apply)

Paper
 Photographic Prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital

Date spans of the records

Beginning year: [] Ending year: []

Arrangement, organizational and/or naming system

[Alphabetical]

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Step 10

If you do not see an appropriate container on the list, select “other” and add a description.

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DCA administrative tools

Transfer Agreement Form

How have the records been prepared for transfer? (Check all that apply)

Labelled Box(es)
 Labelled Folder(s)
 Created Inventory
 None

Extents

Number of units: 10 [Box] **+**
 Number of units: 5 [Other] Type of unit: []

Format of the records (Check all that apply)

Paper
 Photographic Prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital

Date spans of the records

Beginning year: [] Ending year: []

Arrangement, organizational and/or naming system

[Alphabetical]

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Select one or more options

Step 11

Next, provide additional information about what you are sending. Please note, “Photographic prints” include negatives and slides.



Enter Beginning and End year of the records

Labelled Folder(s)
 Created Inventory
 None

Extents
Number of units: 10 Box
Number of units: 5 Other Type of unit: plaques

Format of the records (Check all that apply)
 Paper
 Photographic Prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital

Date spans of the records
Beginning year: Ending year:

Arrangement, organizational and/or naming system
Alphabetical

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Current or previous storage system(s) for the records
Not Applicable

Add Inventory

Step 12

Enter both a beginning and end date for the materials you are transferring. If you are not exactly sure of the dates, put in your best estimate and enter “Date Range is Approximate” in the Transfer Notes section below.

Select one options

None

Extents
Number of units: 10 Box
Number of units: 5 Other Type of unit: plaques

Format of the records (Check all that apply)
 Paper
 Photographic Prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital

Date spans of the records
Beginning year: 1900 Ending year: 2000

Arrangement, organizational and/or naming system
Alphabetical
Chronological
Subject
Library of Congress
Not arranged
Other

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Current or previous storage system(s) for the records
Not Applicable

Add Inventory

Step 13

Now, let us know if the materials you are sending are arranged in any special way. If you have your own special way of arranging the files, select “Other” and provide an explanation of your system in the “Transfer Notes” section.

Created Inventory
 None

Extents
Number of units: 10 Box
Number of units: 5 Other Type of unit: plaques

Format of the records (Check all that apply)
 Paper
 Photographic Prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital

Date spans of the records
Beginning year: 1900 Ending year: 2000

Arrangement, organizational and/or naming system
Not arranged

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.
Boxes housed in leaky abed.

Current or previous storage system(s) for the records
Not Applicable

Add Inventory

Step 14

The “Transfer Notes” box is a place where you can tell us anything special about the materials you are transferring. Anything you think is important and provides context to the materials is appropriate to put here. This is *not* the place where you put the inventory of what you are sending.



None
Extents
 Number of units
 Number of units Type of unit

Format of the records (Check all that apply)
 Paper
 Photographic Prints
 Artifacts
 Analog Media (tapes, video, etc.)
 Digital
Date spans of the records
 Beginning year Ending year

Arrangement, organizational and/or naming system

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Current or previous storage system(s) for the records

Step 15

The storage system field is not currently in use.

Beginning year Ending year

Arrangement, organizational and/or naming system

Transfer notes: Please provide any additional information, excluding an inventory, about the history of the records, the person or office that created the records, or any special considerations regarding the records such as physical condition and arrangement/organization.

Current or previous storage system(s) for the records

 Select here

Template information
 The following information will be automatically added to this document, inherited from its transfer agreement template.
 Activation date for the Standing Submission Agreement: 2010-08-09
 Document(s) that give the archive the authority to accession, manage, and preserve the records: University Records Policy
 Creator(s) of the records: Name: Unknown/Generis Offices; ID: ; Email: ;
 Person or group authorized to transfer the records to the archives: Name: Veronica A Martzahi; ID: vmartz01; Email: Veronica.Martzahi@tufts.edu

Step 16

Select the “Add Inventory” button to move to the next screen. This is a required step in the process.

Tufts UNIVERSITY Digital Collections & Archives
 Search GO >
 TAPER Home
 Welcome, vmartz01.
 Submission Tools
 Homepage
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 DCA administrative tools

Uploading inventory files
 Please attach one or more files (e.g. Excel documents) that describe this transfer agreement's inventory.
 File: **Select here**
 If you have more than one file to attach, click the "Add another file" button for each one.

 Click the button below once you have specified all of the files you wish to attach to this submission agreement.

[Click here if you'd rather type in a plain text inventory description.](#)

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Step 17

You now have the option of attaching an inventory file or typing in a quick inventory. To add an existing inventory file, start by selecting the browse button. Just a reminder, this is where you add inventories, not transfer electronic records to the DCA.



Tufts UNIVERSITY Digital Collections & Archives

Search GO >
this site tufts.edu people

TAPER Home

Welcome, vmart01.
Log out of Form

Submission Tools

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Uploading inventory files

Please attach one or more files (e.g. Excel documents) that describe this transfer agreement's inventory.

File:
H1DCAvm_jobsvrs_up

If you have more than one file to attach, click the "Add another file" button for each one.

Select here

Click the button below once you have specified all of the files you wish to attach to this submission agreement.

[Click here if you'd rather type in a plain text inventory description.](#)

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Step 18

If you have additional inventory files to add, click here.

Tufts UNIVERSITY Digital Collections & Archives

Search GO >
this site tufts.edu people

TAPER Home

Welcome, vmart01.
Log out of Form

Submission Tools

Homepage
Transfer Agreement Form
DCA administrative tools

Uploading inventory files

Please attach one or more files (e.g. Excel documents) that describe this transfer agreement's inventory.

File:
H1_jobsvrs_updates.xlsx

If you have more than one file to attach, click the "Add another file" button for each one.

Click the button below once you have specified all of the files you wish to attach to this submission agreement.

(highlighted in red)

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Step 19

If you don't have a prepared inventory file, click the text at the bottom of the screen to type in a plain text inventory description.

Submission Tools

Homepage
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Adding a text inventory

Please type in some text that describes the records you are transferring.
[Click here if you'd rather upload inventory files, instead.](#)

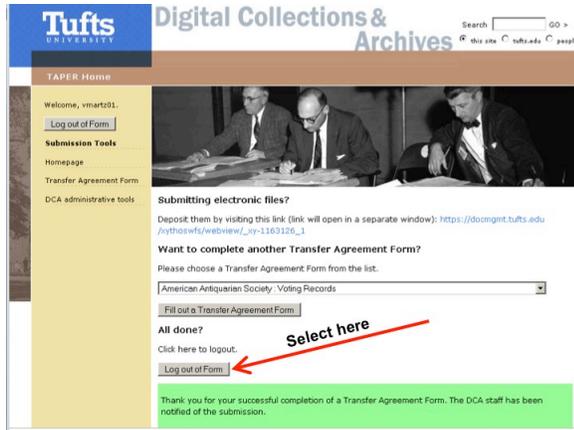
Boxes of meeting minutes and agendas;
honorary degrees on plaques

Select here

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Step 20

Type your inventory into the box and click the "Attach this as inventory" button.



Step 21

If you do not have electronic records to transfer your submission form is complete and you can log out. The Digital Collections and Archives has now been alerted that you will be it sending materials. Someone from the department will contact you to make arrangements to physically transfer the materials to the DCA.



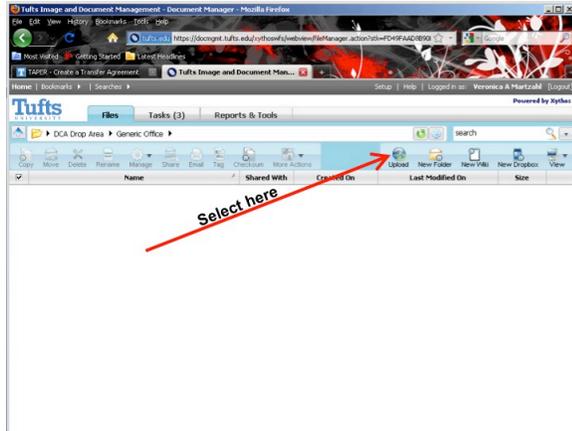
Step 22

If you are transferring electronic records, select the link under “Submitting electronic files.”



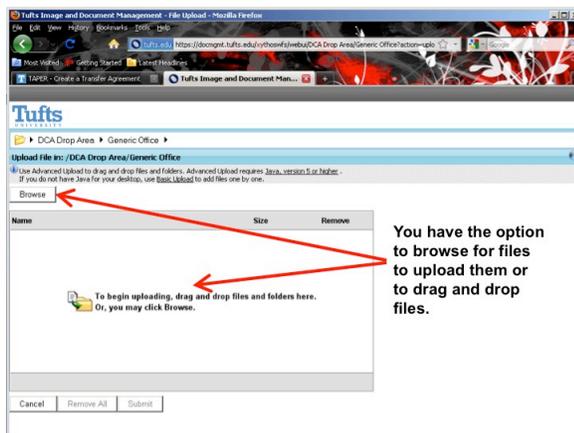
Step 23

This will take you to a secure drop box in a different tab in your browser. You will need to log in again with your Tufts username and password.



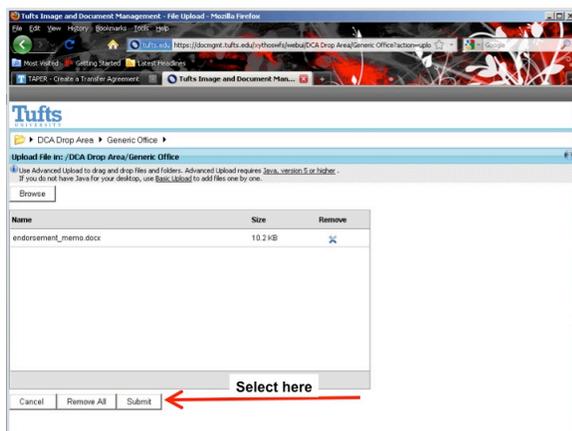
Step 24

Click the upload icon.



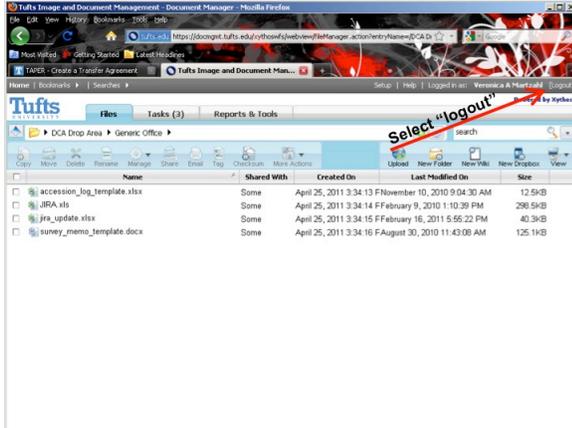
Step 25

You will have the option to browse for files, or to drag and drop files into the upload area.



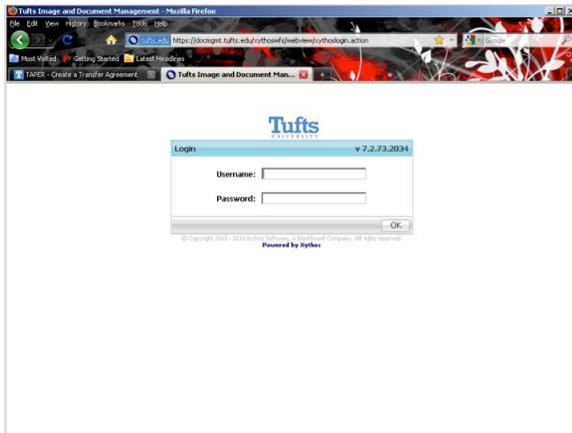
Step 26

Select Submit to begin the upload process.



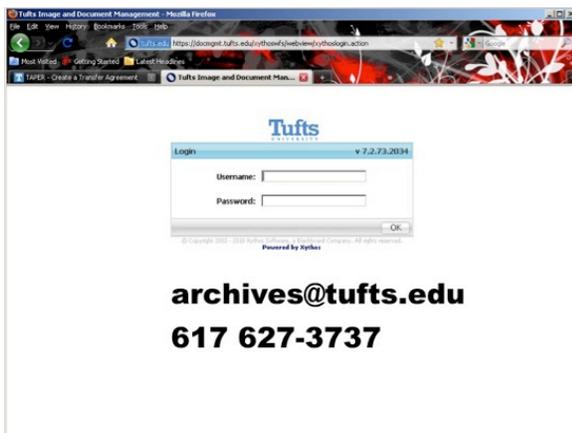
Step 27

Once the files are uploaded, select logout in the upper corner.



Step 28

You have now submitted your records and completed your transfer process.



Step 29

If you have any further questions or concerns about transferring materials to the DCA please contact us at archives@tufts.edu or at 617-627-3737.