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
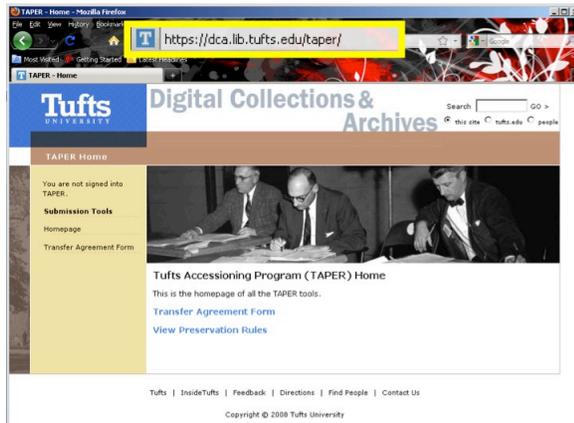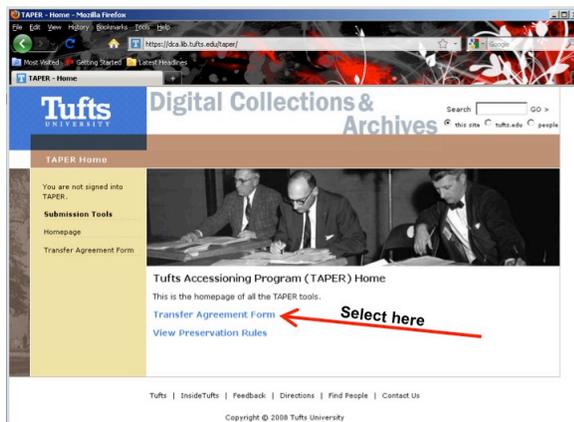
Step 2
Select the Transfer Agreement Form link.
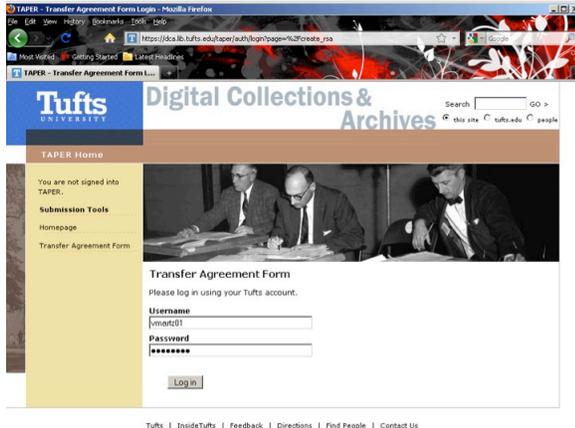
Step 3

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.

Step 6

You are now in the transfer agreement form.

Step 7

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

Step 8

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

Step 9
If you have multiple container types, add an additional line by selecting the plus sign.

Step 10
If you do not see an appropriate container on the list, select "other" and add a description.

Step 11
Next, provide additional information about what you are sending. Please note, "Photographic prints" include negatives and slides.

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.

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.

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 were you put the inventory of what you are sending.

Step 15

The storage system field is not currently in use.

Step 16

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

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.

Step 18

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

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.

Step 20

Type your inventory into the box and click the "Attach this as inventory" button.
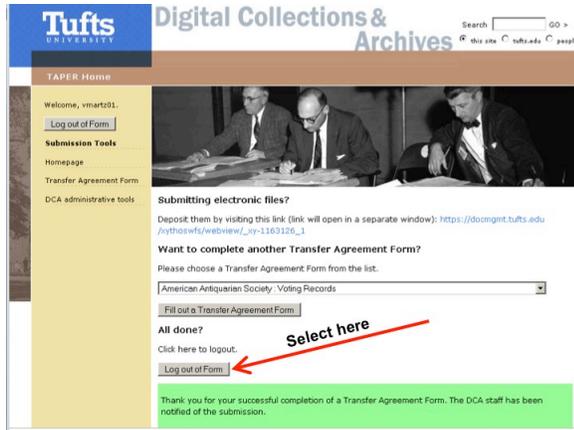
Step 21

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.
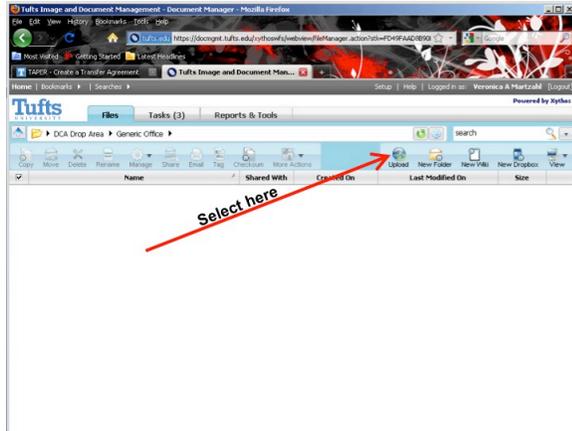
Step 24
Click the upload icon.
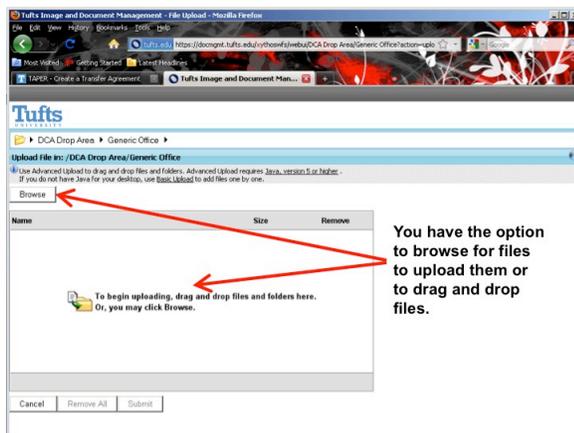
Step 25
You will have the option to browse for files, or to drag and drop files into the upload area.
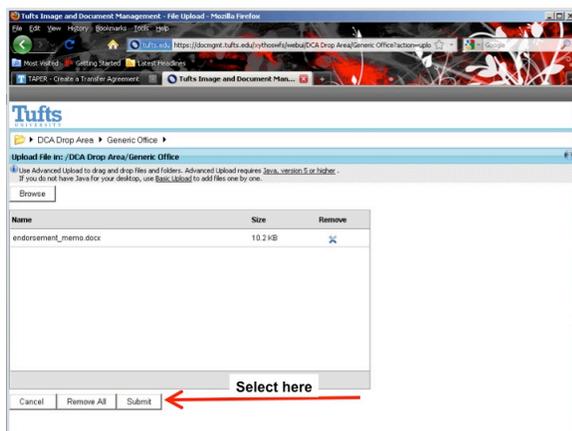
Step 26
Select Submit to begin the upload process.
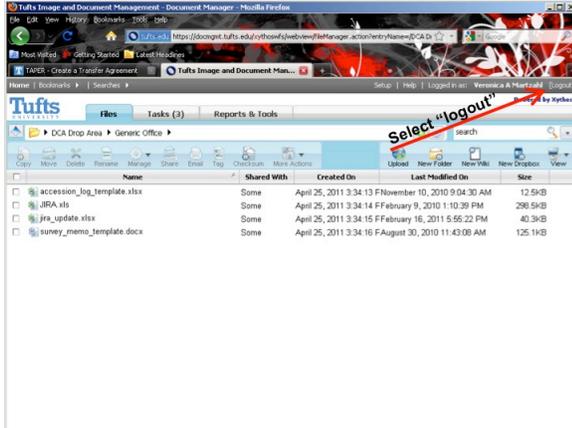
Step 27

Once the files are uploaded, select logout in the upper corner.
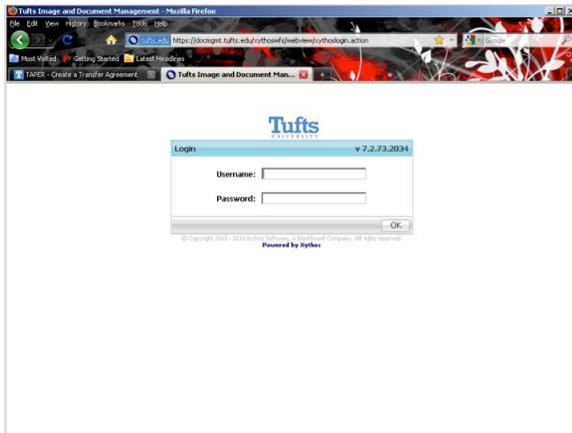
Step 28

You have now submitted your records and completed your transfer process.
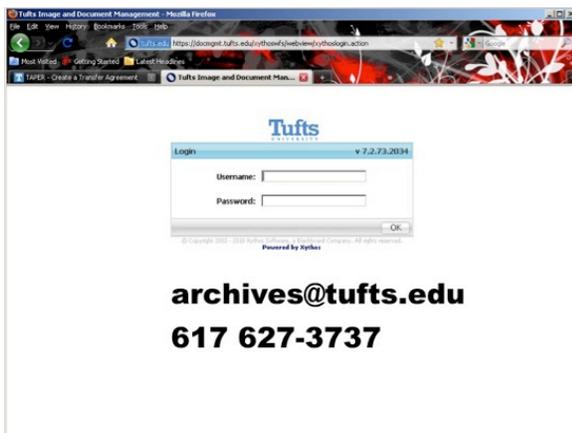
Step 29

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.