Transfer Procedures for Account Owners: Overview

Contents

What email can be transferred?

SFU Archives is selective in its acquisition of email: not all email can or should be permanently preserved. Consult with an archivist to determine whether or not your email is suitable for long-term preservation and if so, which parts of it.

In general:

- Emails made or received in your capacity as an SFU employee engaged in university business are university records and may be transferred to the Archives under an applicable Records Retention Schedule and Disposal Authority (RRSDA).

- Emails made or received as personal correspondence may be transferred to the Archives under a Donation Agreement.

- Faculty members' emails relating to research or teaching materials are personal correspondence.

An archivist will advise you on how to proceed. Note that the transfer process currently captures only email messages and attachments; it **does not** capture other records typically included in email platforms, e.g. calendars, address books, task lists.

Implications of transfer

Please be aware of the implications of transferring your email to Archives. It is not a service to provide you with ongoing access to your own email. Rather you are making a transfer or donation of records to the Archives that we will preserve and manage for the use of future SFU administrators and researchers as an historical resource.

Email transferred to Archives is stored offline, outside any active email system. Once you delete it from your active account you not be able to access it through SFU Mail. Currently the Archives provides only offline access to historical email collections through software (ePADD) installed on a dedicated terminal in the Archives reading room.

If you require continuing access to some or all of the email after transfer do not delete it from your active email account. Consult an archivist to determine what is most appropriate for your own circumstances.

Transfer procedures

Transfer procedures are different depending on whether you are transferring SFU or non-SFU email. At present, the only non-SFU email the Archives has acquired is Gmail.

- [Procedures for SFU email](#)
- [Procedures for Gmail](#)

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SFU Email Accounts

This page describes how to transfer email from an SFU account. In the Workflow Diagram, see the actions in the `Producer` column.

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- Determine scope of transfer
- Create a Transfer Folder
- Notify Archives Transfer Folder ready
- Signal consent
- Respond to requests for additional information
- Receive notice that transfer is completed
- Delete or separate transferred email

Initiate request to transfer

Workflow Diagram, steps A1–A5

Contact the Archives if you wish to transfer email.

- An archivist will consult with you to determine if your email is suitable for long-term preservation.
- The Archives does not acquire all SFU email; see the page on Appraisal for more information.

Determine scope of transfer

Workflow Diagram, step A6

An archivist will work with you to determine the scope of the transfer.

- Under exceptional circumstances, the Archives may acquire an entire account, but this typically only happens with inactive accounts (e.g. a faculty member's estate wants to donate their personal archives, including email correspondence).
- The archivist will advise what types of email has long-term value and should be transferred.
- The archivist will also advise on whether you should retain or delete the email after transfer is complete.

Create a Transfer Folder

Workflow Diagram, step A7

Create a `Transfer Folder` in your `Inbox` to gather all folders and messages you will transfer.

- Give it a descriptive name, e.g. `ArchivesTransfer_July2022` .
- You can move entire folders or individual messages.
- You can add as many folders-within-folders as you wish.

In general you should try to maintain messages in their original folder structure as you used them; this provides valuable context for future researchers that will help them understand your email archive.

Notify Archives Transfer Folder ready

Workflow Diagram, step A8

Contact the Archives when your `Transfer Folder` has been finalized.

- Give us the exact name of the folder.
- Do not delete the email from your active account until the Archives sends you notice that the transfer has been completed.

Provide consent

Workflow Diagram, step A12

The Archives will send a request to SFU IT Services to make a copy of your `Transfer Folder` to an Archives' email account dedicated to email transfers.

You will be cc'd on the transfer request.

Reply to both ITS and Archives to signal your consent to the transfer of your email.

- In the body of the message, simply say "I consent to the transfer of my email."
- Include your email signature if you use one.

Respond to requests for additional information

Workflow Diagram, step D2

An archivist will review your transferred email in order to conduct some high-level appraisal.

- We may not retain all folders; see the page on Folder-Level Appraisal for more information.
- The archivist may contact you to request more information about your email practices in order to better understand the context and content of particular folders.

Receive notice that transfer is completed

Workflow Diagram, step F3

An archivist will contact you when the transfer is complete.

- This means that we have confirmed that the data transferred successfully, have appraised / selected at the folder level, have exported the messages and attached out of SFU Mail and ingest the records into our digital preservation system.

Delete or separate transferred email

Workflow Diagram, step F4

If you no longer need to access the email messages transferred, you can now delete them from your account.

- **Once deleted, you will not be able to view transferred email from your SFU account.**

- The Archives' access protocols are set up for third parties to access historical email collections in an offline environment.
- If you need continuing access to particular messages, do not delete them from your account.

If you do retain some or all of the transferred messages, move them to a folder in your account clearly separated from your other email and marked as already transferred (e.g. a folder named `Transferred to Archives`, with sub-folders for each transfer).

- This ensures that you do not inadvertently re-transfer the same email later on.

Contact the Archives if you are uncertain whether you should retain or delete transferred email.

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Transfer Procedures for Gmail Accounts

The Archives can accept non-SFU email in certain circumstances under the terms of a Donation Agreement. But non-SFU email must be transferred in `mbox` format or in a format that we can convert into `mbox` (see [Formats](#)). **Gmail** can be readily exported by users themselves in `mbox` form.

Export Gmail as mbox

Use Google's "takeout service" to export and download your Gmail as `mbox` files.

1. Navigate to your Google account page and log in (https://myaccount.google.com).

2. Click the `Data and personalization` link on the sidebar.

3. Scroll down the page and click the `Download your data` link.

4. On the `Google Takeout` page, scroll down to the `Mail` section.

5. Click `All Mail data included` button.

6. In the `Mail contents options` menu, deselect `All Mail` and select the individual mailbox folders you want to export and transfer (even if you select every folder).

The last step (deselect `All Mail`) is critical because it ensures that the original folder structure is preserved, i.e. Google will export each folder as its own `mbox` file rather than simply creating one big `mbox` file for everything.
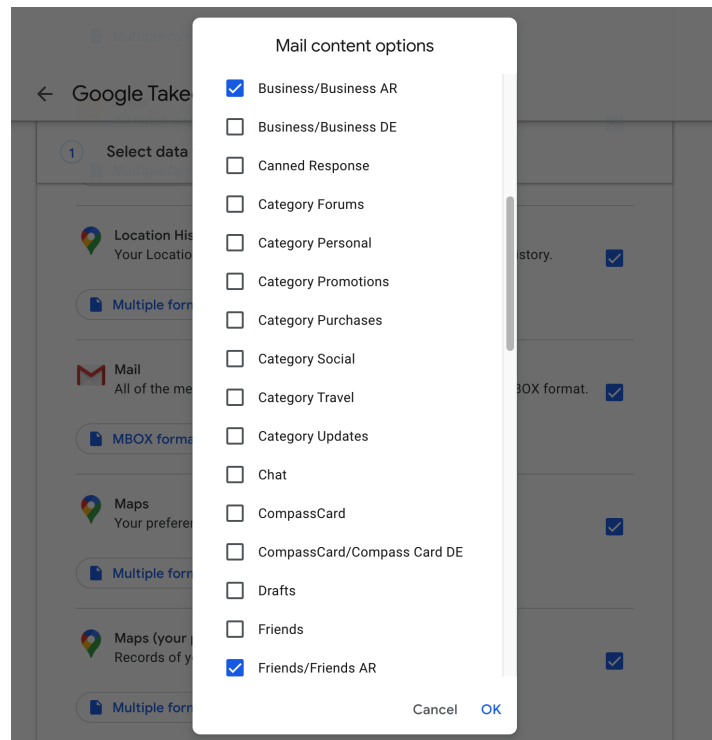
Typically it will take some time for Google to prepare your email for download. When it is ready, Google will email your Gmail account with a link to download the `mbox` files.

Transfer mbox files to Archives

Once you have your Gmail in `mbox` form, contact the Archives to arrange transfer. Typically this will involve packaging the files using the Archives' SFU MoveIt packager, then uploading the resulting `transfer package` to a designated `deposit folder` on SFU Vault or copying it to an external or USB drive for delivery to the Archives.

For more information about the Archives' standard digital transfer procedures, see the Transfer Digital Records page on the Archives' website.

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