

Section 4 outcomes

We will move records that are selected for preservation to the archive once they are no longer in active use and (check all that apply):

At the end of the project/mission (the process is embedded into other end of mission activities)

Every year, in:

Before we send records to the archive, we will:

Ensure the filing is organised and folders and files have names which clearly indicate what they are

Extract files that are due to be preserved but are not kept on our main filing system from the following systems (list here: e.g. WhatsApp, email, any line of business systems):

Dispose of files which are not due to be preserved for any length of time.

Marked up files which are due to be closed for a set amount of time, or destroyed at a certain point in the future.

Ensure the files have the following metadata attached to them in some way:

Element	Recorded at file or folder level
File name	File and folder level
File format	File level
File size	File and folder level
Security level	Folder level
Creator(s)	File and folder level
Date created	File and folder level
Date last modified	File and folder level
Review/disposal date (if applicable)	Folder level

Optional pre-archiving actions (check all that apply, if chosen):

Preparing a contextual ‘front sheet’ that outlines important contextual information about the mission/work, like the names and roles of key figures, background, definitions of any jargon used.

Creating a checksum for the files (only necessary if a checksum will also be created after the files have been moved to check the file integrity post move)

Our transfer method is (select one):

Drag and drop

Using a trusted file copying tool, namely:

Our storage system's in built migration tools, namely:

After we have moved the files to the archive we will:

Check that none of the files have been lost/corrupted during the transfer by:

Ensure that none of the files can be edited or moved from their filing structure by:

Apply security measures to sensitive files by:

The role/person responsible for preparing the archive to be moved is:

Add the name of the role which will be responsible for these tasks. Note: you can assign this job to multiple people, e.g. one role from each team.

Approval of KS for the above:

Names, roles and date agreed