

DATE: August 31, 2024
TO: Cathy Lee Gierke, OCC Co-Chair
Julia Wallace, UMRA Archivist
FROM: Julia Wallace, UMRA Archivist
RE: UMRA Archivist Toolkit

Archives workflow

- Work with Organizational Continuity Committee (OCC) to assure that the annual call for reports and updates includes appropriate reference to the archives, including the *UMRA Archives Guidelines*.
- Assure that reports and documents are sent to the UMRA Archivist, preferably as Word documents and not PDF.
- When documents are received, download them into a designated folder.
- Scan documents for any obvious errors (e.g. incorrect or missing dates) and incomplete or misleading document titles; correct as necessary.
- Watch for monthly mailings from UMRA President and download appropriate documents from the monthly packet – meeting agendas, special reports, etc.; not everything from the packet will be appropriate for the archives.
- Watch for mailings from UMRA Secretary with approved minutes.
- Annually or more frequently, copy files onto a flash drive to take to a printer.
- A personal membership in a company that does printing, such as Office Max, will save on printing costs.
- Identify documents that require printing in color, since it is more costly to print. These may be charts in special reports, surveys, etc. Do not use color printing for documents that simply have links or other in-text colors that have no bearing on the report. Submit color documents in a separate batch for the printer.
- Save printing receipts for submission to the UMRA Treasurer.
- Organize the printed documents and insert them into folders, labeled in pencil.
- Deliver folders to the University Archives, after making an appointment with our contact, currently Rebecca Toov. This may be done annually or every two or three years.

Other responsibilities

- Attend meetings of the OCC
- Consult with the University Archives contact about archive issues