

# Digital transfer - overview

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## 1 Managing the digital transfer process

Archives New Zealand (Archives) manages digital transfers on a case-by-case basis and in stages. These stages are:

- Transfer initiation
- Transfer planning
- Transfer preparation
- Transfer
- Post-transfer

Archives take a modular and iterative approach to guidance development as our tools and methods continue to evolve. Existing and new guidance material will be linked to each stage to assist with navigating the process. When a public sector organisation is involved in a digital transfer, Archives encourages the organisation to provide feedback to assist with shaping the guidance and to share their experiences with others in the sector.

## 2 Working with us

The executive sponsor from the transferring organisation should ensure adequate resources are made available for the digital transfer project. A member of staff should be appointed to lead the work required from the organisation and it is likely that a small team with the relevant skills will be needed. These skills include information and records management knowledge, technical knowledge and possibly coding ability. The team should be prepared for regular discussions, correspondence and meetings with Archives, particularly at the beginning of the process to discuss any issues and questions. These meetings are crucial for a successful transfer.

The whole transfer process is a partnership, from which both parties can benefit. The partnership approach also helps Archives and organisations to manage transfers successfully within their respective resource constraints.

## 3 Understanding digital transfers

Many process steps are similar for physical and digital transfers, for example, the use of disposal authorities and access authorities. However, the order of the steps for digital transfers does not always match that of physical transfers. One key difference is that much of the work which happens in the 'Transfer Preparation' stage for physical transfers instead takes place in the 'Transfer Initiation' stage for digital transfers. Detailed analysis work must be done beforehand in order to assess the feasibility of the digital transfer and then to plan it.

A distinctive characteristic of digital transfers is the repetitive nature of some of the steps. There are likely to be many recurrences of analysis being done and issues with files, metadata or tools discussed and addressed throughout the process. Initial test extracts or trial transfers are also necessary, whereas sample checks are done with physical information and records. This means that flexibility is essential when planning timeframes for a digital transfer.