Instructions for Transfer of Final Research Reports into University Archives

To ensure compliance with Tennessee Tech Policy 113: Record Retention and Disposition, all principal investigators (PIs) on externally funded projects are responsible for the transfer of the final project report to the University Archives. This procedure provides instructions for uploading final reports or deliverables from grant/research work. This does not include PreAward materials, budgets, or internal forms. It only includes the final project report that is typically submitted to the granting agency.

<u>Create a folder and text file and rename report file</u>

1. Please save the report as a .pdf/.pdf/a and change the file name
    - SR_ Date _Name
    - Example: SR_2020_08_30_Atkinson

> *To change the name of a folder or document in windows:*
>
> 1. *Select the file or folder you want to rename and click the right mouse button.*
> 2. *Click or tap the "Rename" button from the selections.*
> 3. *With the name selected, type a new name, or click or tap to position the insertion point, and then edit the name (This can also be done with a SLOW double click to the file or folder).*

2. Create a folder labeled the same as your file name. Example: SR_2020_08_30_Atkinson.

> *To create a folder:*
>
> 1. *Right click your mouse.*
> 2. *Select new from the dropdown.*
> 3. *Select folder.*

3. Create a file with the below information that describes the materials you are uploading with the following information and save it in a text document (.txt) titled the same as your file with the word metadata added at the end. Example: SR_2020_08_30_Atkinson metadata

> *To create a text (.txt) file:*
>
> 1. *Open a Microsoft word document.*
> 2. *Add content as described below.*
> 3. *When you are done and have performed spell check, go to the "File" tab on the top left of the screen. Select "Save As".*
> 4. *Select the desired folder "SR_2020_08_30_Atkinson"*
> 5. *Enter the desired file name "SR_2020_08_30_Atkinson metadata"*
> 6. *Under the "file name" select the drop down "Save as type" and select the option "Plain Text (*.txt).*

Department/College: Tennessee Technological University. College of Fine Arts

PI/PIs (last name, first name, middle initial: Atkinson, Megan M.

Title of Report: "Marvel vs DC"

Index #: 531800

Date report finalized: YYYY-MM-DD, YYYY-MM, or YYYY

Language If English, this can be left blank.

Two sentence summary/description: this project tested whether it is better to be a fan of Marvel or DC comics and if one or the other makes you a better person.

Rights: Type restricted, public, or open (see below for definitions). Note if your materials only need to be restricted for a certain time period.

- *Public: uploads your report in our digital collections and will be downloadable for all users with copyright restrictions noted in the metadata. The link to our database for digital archives is here: https://tntech.access.preservica.com/archive/*
- *Open: provide users of our digital collections a brief description of your work, but it will not be viewable or downloadable. Users will need to contact the archives for assistance with the materials.*
- *Restricted: This material is not available to anyone.*

4.   Save and move the text document and report to the folder you created.

Transfer folder and ingest materials into Preservica

1. Open up the Preservica software by going to the following link: https://us.preservica.com/put/

2. Login to ingest/place materials into software using:
Username: Research@tntech.edu
Password: uH6bfVqxEM

3. Using your mouse, select the folder containing the report and text document you created and move/drag desired files into the Preservica upload area.
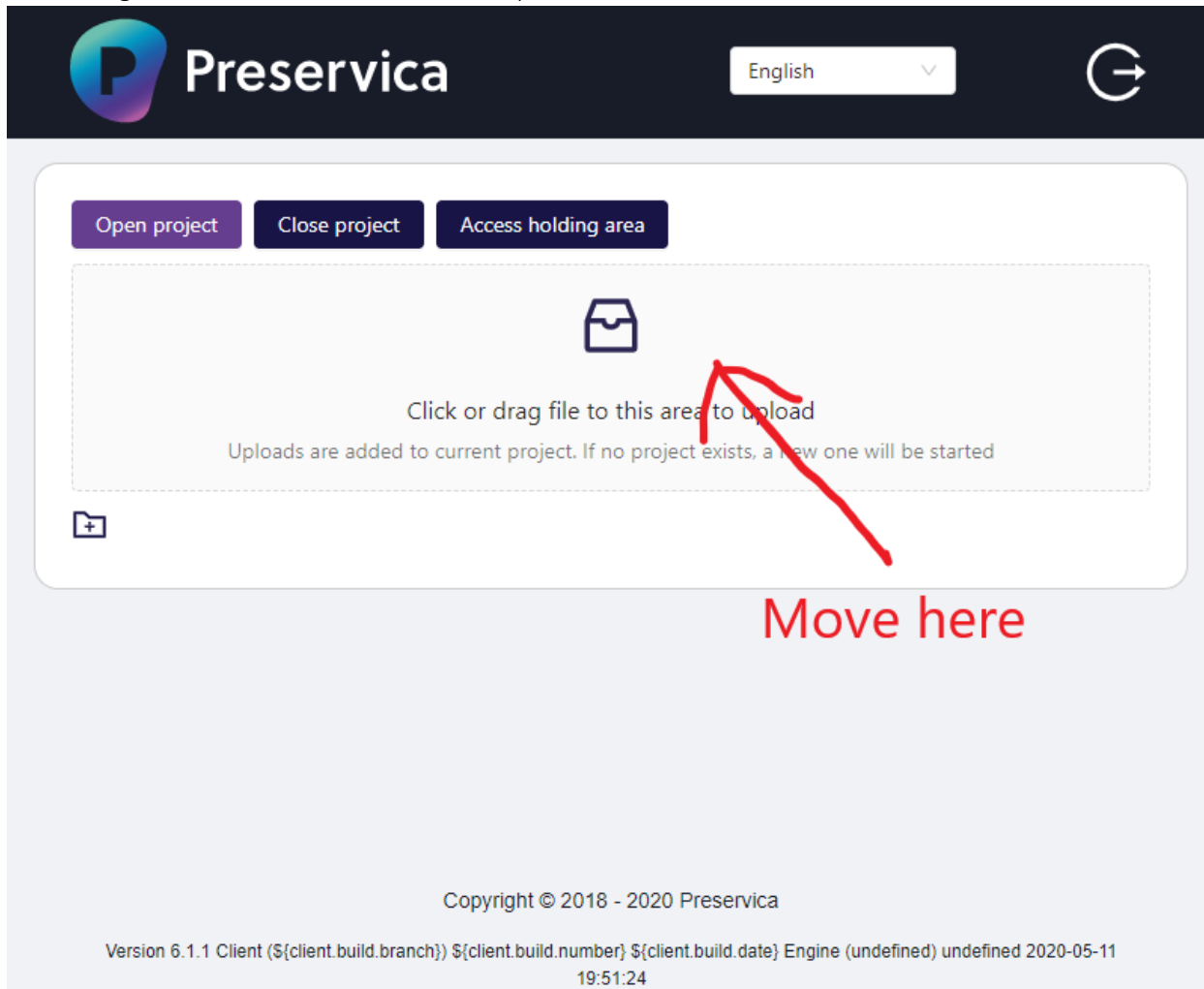
4. After the materials are uploaded, a menu will display on the right side of your screen allowing you to add relevant details about the materials. The guidance below provides responses for items seen in both version 5 (V5) and version 6 (V6) of the software so some items might not be displayed on your screen.

Options
- **Project name:** same title as the file name
  - **Example**: SR_2020_08_30_Atkinson
- **Structure Type (V6):** Select "Standard: Folder and File Structure maintained. " Do not check "Do not create a folder in Preservica" box
- **Structure Type (V5):** Select "Represent each folder as a separate deliverable unit."

Folder (Collection) Selection
- **New or existing**: Select "Existing."
- **Choose existing folder (collection):** Type/select "Restricted-Sponsored Research"

Folder Options
- **Identifier:** Select "use folder name"

- **Description (V5: scope and content):** Select "use folder name"
  Do not check "Digital Surrogate" box
- **Security Tag:** Select "restricted" "Open," or "Public." See page two of this instructions document for descriptions of the security tags. Please select the tag that provides users with the best possible access to your materials unless they are restricted.
- **Metadata in XML format:** Select "no metadata files"
- **Do not touch "Generic Metadata" or "Fixity options"**

5. Click the "Save Project" and then select "Save and Upload."

If you have any questions, please contact University Archives at archives@tntech.edu or (931) 372-3849