The Michigan State University Archives & Historical Collections used the DOS-based “MicroMARC” collection management program since the mid-1980s. MicroMARC was developed by MSU to manage its accessions and to support a rudimentary records management workflow. In Spring 2011, the UAHC migrated its existing accessions and processed collection records to Archivists’ Toolkit (AT). Rather than creating or purchasing a separate tool, it was decided to implement a Records Management workflow using AT. Adding a second repository to AT and several user defined fields provided a workflow for managing the university’s non-permanent records.

**GOALS**

- Workflow must be developed for managing university records using Archivists’ Toolkit taking into account previous MicroMARC and paper-based workflows.
- Workflow must handle inactive records and records slated for destruction per university retention schedules.
- Workflow must include a means to schedule records for future destruction.
- Workflow must include documentation of all records destroyed in the past.
- Workflow must include a means to separate active records and destroyed records.
- Workflow must be applicable regardless of form (paper or electronic).

**REQUIREMENTS**

- **Two (2) AT Repositories with user defined access privileges**
- **Accession numbering system (an R accession number for material scheduled for destruction or an A accession number for material with a permanent retention)**
- **Two reports:**
  - scheduled deaccessions
  - destroyed (by office with physical extent)
- **Attach scanned transmittal form to accession record in AT.**

**METHOD**

**RECORDS RECEIVED**

- Accession record created in AT
- Permanent records assigned an “A#”
- Scheduled records assigned an “R#”
- Fields completed for records management include: Title, Extent, Date Range, Resource Link, Location, Retention Rule, Description, Acquisition Date (physical receipt), Link to external documents (transmittal form)

**RECORDS MANAGEMENT**

- Records with permanent retention are processed
- Scheduled records with a finite retention period are monitored using report to identify upcoming destruction dates. Report keys off of word “Discard” in Retention Rule

**PERMANENT RECORDS**

- Records processed and accession updated in AT
- AT Resource record updated and finding aid entered
- Finding Aid exported as EAD and MARC (for library catalog)

**DESTROYED OR RETURNED RECORDS**

- Disposition Note updated
- Deaccession record entered (date, description of materials, extent, disposition (Destroyed or Returned))
- Location removed
- Accession moved to Destroyed repository

**RESULTS**

- Procedures created to document workflow for:
  - Accession creation (for permanent and non-permanent retention)
  - Accession destruction, return or transfer
  - Partial accession destruction, return or transfer
  - Reporting “scheduled deaccessions” and “destroyed by office”
- Identified problem in AT when searching across multiple repositories (AT-2427).

**CONCLUSION**

- Working process in place for managing university records using Archivists’ Toolkit.
- Monitoring ArchivesSpace specifications and development for records management functionality via their website (archivesspace.org) and their Google discussion group (ArchivesSpace).

**ACKNOWLEDGEMENTS**

- The NHPRC for funding the Spartan Archive Project.
- The Andrew W. Mellon Foundation for funding Archivists’ Toolkit.
- The UAHC staff and student assistants for their work in migrating the legacy MicroMARC records and subsequent data cleanup in Archivists’ Toolkit.