	Historic England	Archive Management Checklist	Project Stage: Project Initiation
Project number:		**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	RASMIS Project number allocated and passed on to Archives team Or informal project number created	PM Archives		
☐	Project Management file created	PM		
☐	Project folder created and location recorded	Archives		
☐	Data Management Plan (DMP) created	PM		
☐	Archive repository identified and has agreed in writing to receive archive	PM		
☐	Written landowner agreement to allow HE to remove finds from site	PM		
☐	Written landowner in principle agreement to transfer of title to finds	PM		
☐	Record project in AA systems	Archives		
☐	Site archive task list and timetable created	PM Archives		
☐	Project Management File updated with PD and all other relevant documents	PM		
☐	Ensure project files are named in accordance with file naming convention	PM/All		
☐	Ensure project data are saved to the correct project folder	PM/All		
☐	Alert AAC and PM to complete files And copied to secure store	All Archives		
☐	Stage Complete	PM Archives		SIGNATURE

	Historic England	Archive Management Checklist	Project Stage: Data-gathering/ Site Archive Completion
Project number:		**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	Environmental samples processed, sorted, selected and data entered	Enviro		
☐	Finds selected, cleaned, marked and recorded	Finds		
☐	X-raying completed and Intrasis x-ray entries created	Cons		
☐	First aid conservation completed and documented	Cons		
☐	Conservation summary written	Cons		
☐	Materials and samples not for retention have been dispersed appropriately	Finds Science		
☐	Materials and samples packed and boxed	Finds Science		
☐	Human remains stored securely	Finds		
☐	Intrasis records entered and checked	PM		
☐	Survey data converted to appropriate file format, named, indexed	Survey		
☐	Survey data stored on S: drive	Survey		
☐	Drawings completed, checked, labelled, indexed	PM		
☐	All drawings scanned, named and given metadata	PM Archives		
☐	All digitized drawings stored in S:\oldshare\Projects \HE-nnnn\Images\Vector	PM		
☐	Drawing indexes complete (including record numbers allocated and used form)	PM		

	Historic England	Archive Management Checklist	Project Stage: Data-gathering/ Site Archive Completion

Project number:	Project Name:	Event:

Complete	Task	Person Responsible	Target date	Notes
☐	Digital and digitised photos selected / discarded	PM		
☐	Retained photos given appropriate file names and metadata	PM		
☐	Digital photos / x-radiographs stored in S:\oldshare\Projects\HE-nnnn\images\xxx	PM Cons		
☐	Other digital files selected, named, backed up and indexed	PM		
☐	Matrices scanned and given filenames and metadata	PM		
☐	Matrix files stored in S:\oldshare\Projects\HE-nnnn\Images\xxx	PM		
☐	Spot date records created	Finds		
☐	Interpretive context index created	PM		
☐	Material Culture summary written	Finds		
☐	Environmental summary written	Enviro		
☐	Project Summary report written	PM		
☐	Original Intrasis dataset frozen	PM		
☐	All digital material in S:\oldshare\ Projects\HEnnnn\xxx or appropriate location	PM		
☐	Site back-ups stored off network	Arch Info		

	Historic England	Archive Management Checklist	Project Stage: Data-gathering/ Site Archive Completion

Project number:	Project Name:	Event:

Complete	Task	Person Responsible	Target date	Notes
☐	Project proforma and drawings delivered to Archives Team	PM Archives		
☐	Project file updated	PM		
☐	Record project in AA systems	Archives		
☐	Project archive accessioned. All systems updated with archive element locations	Archives		
☐	File Index Form created	ARCHIVES		
☐	Select and appraise files	PM Archives		
☐	Ensure DMP is up to date	PM/All		
☐	Ensure project files are named in accordance with file naming convention	PM/All		
☐	Ensure project data are saved to the correct project folder	PM/All		
☐	Alert AAC and PM to complete files And copied to secure store	All Archives		
☐	Stage Complete	PM Archives		SIGNATURE

	Historic England	Archive Management Checklist	Project Stage: Reporting
Project number:		**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	Internal movement of material recorded	Specialists Archives	Ongoing	
☐	Movement of material to external specialists recorded as a loan	Specialists Archives	Ongoing	
☐	Assessment data/reports in S:\oldshare\ Projects\Prnnn\xxx or appropriate location	PM		
☐	Intrasis records updated with assessment information	PM		
☐	Security copy of Intrasis data created	PM Arch Info		
☐	Material returned from external specialists to finds or science teams as appropriate	Specialists		
☐	Materials returned to archive as appropriate	Specialists		
☐	Loans / accession information updated	Archives		
☐	Transfer of Title forms signed by landowner	PM		
☐	Ensure DMP is up to date	PM/All		
☐	Ensure project files are named in accordance with file naming convention	PM/All		
☐	Ensure project data are saved to the project folder	PM/All		
☐	Alert AAC and PM to complete files And copied to secure store	All Archives		
☐	Stage Complete	PM Archives		SIGNATURE

	Historic England	Archive Management Checklist	Project Stage: Reporting
Project number:		**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	Any additional material sent to external specialists and loans recorded	Specialists Archives		
☐	Internal movement of material for specialist analysis recorded	Specialists Archives		
☐	Intrasis updated with information from analysis, as appropriate	PM		
☐	Intrasis updated with laboratory / sample numbers as appropriate	Science		
☐	Analysis data/reports in S:\oldshare\ Projects\Prnnn\xxx or appropriate location	PM		
☐	Additional x-raying completed and Intrasis x-ray entries updated	Cons		
☐	Specialist reports completed in S:\oldshare\ Projects\Prnnn\xxx or appropriate location	PM Finds Science		
☐	Specialist digital material (data, text, images etc) received, selected, named and indexed	PM Archives		
☐	Materials returned to archives team	Finds Science		
☐	Ensure appropriate metadata has been created for all GIS, Vector, database or spreadsheet files created	All PM		
☐	Update File Index Form, ensuring that selection decisions are captured and software information including version are included	Project Team		

		Historic England	Archive Management Checklist	Project Stage: Reporting
Project number:			**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	Loans information updated	Archives		
☐	Environmental / scientific samples retained by specialists labelled and documented	Science		
☐	Finds drawings checked, labelled and indexed	Finds Graphics		
☐	Project file updated	PM		
☐	Record project in AA systems	Archives		
☐	Ensure DMP is up to date	PM/All		
☐	Ensure project files are named in accordance with file naming convention	PM/All		
☐	Ensure project data are saved to the correct project folder	PM/All		
☐	File Index Form created	ARCHIVES		
☐	Select and appraise files	PM Archives		
☐	Alert AAC and PM to complete files And move or copied to secure store	All Archives		
☐	Stage Complete	PM Archives		SIGNATURE

	Historic England	Archive Management Checklist	Project Stage: Reporting
Project number:		**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	Project report in S:\oldshare\ Projects\Prnnn\xxx or appropriate location	PM		
☐	Original drawings checked, labelled and indexed	PM Graphics		
☐	Hard copy report prepared for inclusion in project archive	PM		
☐	Project file updated	PM		
☐	Record project in AA systems	Archives		
☐	Update File Index Form, ensuring that selection decisions are captured and software information including version are included	Project Team		
☐	Files accessioned to S:\oldgroups\Archaeologic al Archives\Digital Archive or record location of files that cannot be transferred	PM		
☐	Ensure DMP is up to date	PM/All		
☐	Ensure project files are named in accordance with file naming convention	PM/All		
☐	Ensure project data are saved to the correct project folder	PM/All		
☐	Alert AAC and PM of any files that are complete and can be moved or copied to secure store	All		
☐	Stage Complete	PM Archives		SIGNATURE

	Historic England	Archive Management Checklist	Project Stage: Archive Compilation
Project number:		**Project Name:**	**Event:**

Complete	Task	Person Responsible	Target date	Notes
☐	Digital records checked for consistency of file naming and metadata	Archives		
☐	Modify file-names and metadata as appropriate	PM		
☐	Intrasis data checked for cleaning	Archives		
☐	Clean Intrasis data as appropriate	PM		
☐	Archive copy of Intrasis data created	PM Arch Info		
☐	Produce data in accordance with the archive or repository requirements	Archives		
☐	Digital archive index compiled	PM Archives		
☐	Paper records ordered and boxed to repository requirements	Archives		
☐	Drawings ordered and packaged to repository requirements	Archives		
☐	Finds packed and boxed to repository requirements	Finds Archives		
☐	Retained samples and material from samples packed and boxed to repository requirements	Science Archives		
☐	Archive catalogue compiled	Archives		
☐	Licence to copyright documentation completed and signed	Archives		
☐	Transfer of appropriate material HEA	Archives		
☐	Date for archive transfer(s) agreed	Archives		

![Historic England logo] Historic England	Archive Management Checklist	Project Stage: Archive Compilation		
Project number:	**Project Name:**	**Event:**		

Complete	Task	Person Responsible	Target date	Notes
☐	Documentary archive transferred	Archives		
☐	Digital material transferred	Archives		
☐	Material archive transferred	Archives		
☐	Project file completed and sent to registry	PM		
☐	Record project in AA systems	Archives		
☐	Update File Index Form, ensuring that selection decisions are captured and software information including version are included	Project Team		
☐	Ensure DMP is up to date	PM/All		
☐	Ensure project files are named in accordance with file naming convention	PM/All		
☐	Ensure project data are saved to the correct project folder	PM/All		
☐	File Index Form created	Archives		
☐	Select and appraise files	PM Archives		
☐	Alert AAC and PM of any files that are complete and can be moved or copied to secure store	All		
☐	Stage Complete	PM Archives		SIGNATURE