



1. Aim of the IMU Archive

Keep record of, and reflect the activity and history of the International Mathematical Union (IMU) in all its facets.

Keep record of, and reflect the activity and history of the International Commission on Mathematical Instruction (ICMI), this archive is a subset of the IMU Archive.

2. Archive location

The archived material is physically preserved at a facility established and equipped to serve this purpose as well as on the server hosting the IMU Web site and providing the electronic infrastructure for IMU.

3. Objects of the IMU Archive

Is all material suitable to give evidence of the activity and history of IMU. The material can be of internal origin and/or external origin.

Collected in the IMU Archive is material in hard copy format as well as in electronic form including audio-visual material. Copies of the IMU Web page are archived at regular intervals.

4. Demand for archiving

There is a general responsibility to archive all documents/material created by the IMU president and secretary, the IMU administrative staff, and the IMU prize committee chairs/prize committees. Other material supplied to the IMU Archive can also be preserved.

IMU's four-year office term is the time span unit applicable to archiving in the IMU Archive. The IMU secretary informs the persons/committees eligible to feed the IMU Archive of their responsibility when they assume office. Anyone who has the obligation to provide material to the IMU Archive according to these guidelines is expected to deliver the material within 3 months at the latest after the end of each four-year term.

5. Classification of archive material

Basically, the person/body delivering material to the IMU Archive is required to assign one out of the three categories of IMU's confidentiality classification to the material and to label it accordingly. Material delivered without labeling is classified by the IMU secretary. The IMU executive committee is authorized to modify characteristics of IMU's confidentiality classification, likewise it is authorized to change the confidentiality category of material archived (exclusively from a lower level of confidentiality to a higher level).



6. IMU categories of confidentiality and access

IMU category of confidentiality	A) General unclassified	B) Union internal use only	C) Confidential
Embargo time (years)	0	20	70
Public access	Immediately.	After 20 years of the end of the four-year term during which the material was created.	After 70 years of the end of the four-year term during which the material was created.
Availability	The material is available to everybody. Copying permitted subject to copyright restrictions.	During embargo: The material is available to IMU officers, IMU EC, IMU administrative staff. After embargo time: Category A) applies.	During embargo: The material is available to IMU officers, IMU EC, IMU administrative staff, except for material of IMU prize selection committees. After embargo time: Category A) applies.
Exceptions		The IMU EC may grant, upon request, access before the end of the embargo time for purposes of research in intellectual history or for reasons of law.	The IMU EC may grant, upon request, access before the end of the embargo time for purposes of research in intellectual history or for reasons of law.
Examples of material	<ul style="list-style-type: none"> • Printed matter such as books, journals, brochures, press releases • All contents of the IMU Web site including the ICM Web sites • Contents of other Web sites concerning the IMU, its representatives or commissions • Artifacts of events as well posters and promotional items • Interviews (only with the interviewee's consent) 	<ul style="list-style-type: none"> • Minutes • Correspondences, discussions within the EC and other committees • Agreements with persons or institutions • ICM documents (e.g., Site Committee) • Financial items that are not, by statute already publicly accessible 	<ul style="list-style-type: none"> • All discussions, statements, correspondences concerning the nominees and nominators, as well as investigations and opinions related to the IMU awards (that is: Fields Medal, Rolf Nevanlinna Prize, Carl Friedrich Gauss Prize, Chern Medal Award, Leelavati Prize, and any other future prize) • Non-official political or personal statements • Oral history tapes, videos and transcripts (the content of which is subject to embargo)



Remarks	Although there may be cases in which drafts are archived as well, typically only the final version of a document is archived to reflect the activity and history of IMU. The person generating the document will make this decision. Any EC members can request that some additional documents be archived.	Although there may be cases in which drafts are archived as well, typically only the final version of a document is archived to reflect the activity and history of IMU. The person generating the document will make this decision. Any EC members can request that some additional documents be archived.	Although there may be cases in which drafts are archived as well, typically only the final version of a document is archived to reflect the activity and history of IMU. The person generating the document will make this decision. Any EC members can request that some additional documents be archived.
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7. Transfer of material to the IMU Archive

When material has reached the IMU Archive the archivist assigns a unique accession number, registers the category of confidentiality, and enters the records into the IMU Archive database.

Instructions for the transfer of hard copy records and materials to the IMU Archive

- Contact the IMU archivist and/or the IMU Archive curator, and additionally the IMU technician, to notify the transfer and agree on the details.
- List and box the records: The transfer should be accompanied by a transfer list. When the boxes are ready, e-mail a copy of the transfer list to the IMU Archive.
- Label category of confidentiality.
- Identify all information clearly (e.g., box number, file title, item).

Instructions for the transfer of electronic/digital records to the IMU Archive

General information:

- Before starting the transfer process, consult the IMU technician and the IMU archivist who will coordinate the transfer of the records. Items of importance are:
 - Formats, organization, and amount of records that are to be transferred.
 - The format of documents should be an open format. The ISO standard PDF/A is preferred.
 - Preparation and tools available for transfer.
 - Capture and storage of these records (e.g., CDs, DVDs, hard drives) or transfer via Internet.
 - Label category of confidentiality.

E-mail correspondence:

Every e-mail received at the address secretary@mathunion.org and president@mathunion.org is automatically archived. If the IMU secretary and the IMU president, respectively, wish to archive e-mail they send they have to insert their e-mail address secretary@mathunion.org and president@mathunion.org, respectively, in the Cc line.

- Make arrangements with the IMU technician for transfer of the records in electronic format that are to be stored in the IMU server environment.
- Archiving of e-mail records in electronic format requires that specific system information be provided to IMU before approval can be granted (file format information, export format for e-mail messages, metadata, transmission and receipt data, attachment management information).
- There are no finalized solutions for e-mail archiving yet.



IMU Archiving Guidelines

Endorsed by the IMU Executive Committee on March 11, 2013

- Alternative: Print the e-mail and transfer hard copies to the IMU Archive (not recommended).

Web sites

The IMU Web site should be archived regularly, at least once a year.

- Contact the IMU technician. Archiving of Web records in electronic format requires that specific system information be provided to IMU before approval can be granted.
- Transfer to the IMU Archive:
 - An electronic version of the Web site.
 - Or: A view version of the page (how it looks when served up by a browser), as well as the source document (the code that creates the page that is served).

The guidelines for electronic materials are updated depending on technological development.