The Embargo System

Embargo a Register and it current and future contents

The embargo process is designed to permit the creation and upload of transcription entries from register documents that have been provided to us under a license that prohibits there retrieval and/or viewing by a researcher either for a certain **period** or until a certain **year**. In other words it prohibits the retrieval of embargoed records by the search engine until the embargo year is reached.

It means that a transcriber can transcribe a **complete register** and for a **coordinator to establish rules** that allow the system to decide **when to release the record**. Eg we have a register document with entries for burials up until 2018. If the Record Office requests that that burial are subject to an embargo that they cannot be retrieved until 50 years after the event; the coordinator can establish the rule, all records can be transcribed; but only records that are old enough to meet the criteria will be found in a search.

Each year the system will automatically release a new set of records that are no longer subject to the embargo. There can be different rules for specific record types. I.e. ba, ma, bu.

There is one additional action that permits a SINGLE record to be embargoed or un-embargoed on the authority of the Trustees.

In summary, embargoes are APPLIED to a record, embargo rules are ESTABLISHED for a register. There are two types of embargo rule. One establishes a **period** of up to 125 years for the embargo. The other establishes a specific **year** when the embargo ends.

Create an embargo rule

An embargo rule may be created for a **register** using the Create New Embargo Rule on the register display. The rules apply only to the records associated with that **register type**. Remember a church can have multiple register types; eg PR MI BT OT EX etc So there can be different rules for different types.

 Different rules can also be created for each **record types** ie ba, bu, ma. **But only one rule per record type per register type.**

Your Actions: › County Options(Yorkshire, West Riding) › Range Selection › Places › Place Information › Church Information › Register Information

Details of the **Parish Register** register for **St Michael and All Angels** in **Haworth** of **Yorkshire, West Riding**

Edit Register Fields | Destroy Register | Change Register Type | Merge Identical Register Types into this one | Create Image Server | Create New Embargo Rule

Once a rule has been created the register option in the display **will change from Create New Embargo Rule to Embargo Rules.** Additional rules or edits to Rules will then be done through the Embargo Rules display

Edit Register Fields	Destroy Register	Change Register Type	Merge Identical Register Types into this one	Create Image Server	Embargo Rules

Creating a first rule has the following **options**

Create New Rule for TR register for St Chad in Saddleworth of Yorkshire, West Riding

Record Type	bu ma ba

Rule	Embargoed until the beginning of Embargoed for the period of

Period (0 to 125 Years) or a specific year from now

* Entity that imposed rule

* Reason for its imposition

Submit

There can **ONLY be one rule for a record type**. **One either embargoes for a period of up to 125 years OR until the start of a specific year. You MUST specify the entity imposing the embargo and their reason.**

Once created all records for batches in the register will be reprocessed in the background overnight; during testing on test3 it will run every 30 minutes on the hr and half hour. You will receive an email with a detailed report once completed.

Any new or replacement file submitted after the creation of a rule will have its records checked for an embargo.

The following examples are provided
An initial creation

Create New Rule for TR register for St Chad in Saddleworth of Yorkshire, West Riding

Record Type	
	bu
	ma
	ba

Rule	
	Embargoed until the beginning of
	Embargoed for the period of

Period (0 to 125 Years) or a specific year from now   2021

* Entity that imposed rule   Records Office

* Reason for its imposition   GDPR

Submit

Add another rule for a different record type:

Create New Rule for TR register for St Chad in Saddleworth of Yorkshire, West Riding

Record Type	
	ma
	ba

Rule	
	Embargoed until the beginning of
	Embargoed for the period of

Period (0 to 125 Years) or a specific year from now   100

* Entity that imposed rule   Records Office

* Reason for its imposition   Contract

Submit

The rules can be listed.

List of Embargo Rules for TR register for St Chad in Saddleworth of Yorkshire, West Riding

Create New Embargo Rule

Record Type	Embargo Rule	Period or end year	Entity that required the rule	Reason for imposition	Actions
ma	Embargoed for the period of	100	Records Office	Contract	Show Edit
bu	Embargoed until the beginning of	2021	Records Office	GDPR	Show Edit

You can edit the period or year, entity and reason for a rule. You cannot destroy a rule. But you can make them ineffective by specifying a period of 0 (zero) or the current year.

Embargo OR Un-embargo a specific entry

Senior members may, on the authority of the trustees', embargo or remove the embargo of a specific record. This action has priority over the register rules and cannot be overwritten by a register rule.

Navigate to the edit of the specific entry that you wish to undertake a specific embargo action. If you have the authority you will see a new action at the top of the record you wish to edit

Your Actions: › County Options(Yorkshire, West Riding) › Range Selection › Places › Place Information › Church Information › Register Information › Batch Information › List of Records › Record Contents › Edit Record

Editing record **1** for batch: **WRYSADBA2.CSV** (Captainkirk) in **Other Transcript** of **St Chad** in **Saddleworth** of **Yorkshire, West Riding**

Edit Embargo

Register entry number	
Birth date	10 Jun 1804
Baptism date	15 Jul 1810
Person forename	Hannah
Father forename	John
Father surname	WHITEHEAD
Father occupation	Clothier
Mother forename	Mary

Select this new option and you will see the options available.

You can set the embargo to true or false, a reason why and the date at which the record can be retrieved. As show below:

On submission you get a record display that has a new line at the bottom. History of the embargo changes.

Film Number	
File line number	1
Line id	Captainkirk.WRYSADBA2.CSV.1
Processed date	15 Dec 2019
History of embargo changes	true Captainkirk 15 Dec 2019 Trustee request

You can edit again (and again) and each edit will add to the history. NEVER change the old!!!

Just the new

Editing record **1** for batch: **WRYSADBA2.CSV** (Captainkirk) in **Other Transcript** of **St Chad** in **Saddleworth** of **Yorkshire, West Riding**

Embargo status

Embargoed	true false

OLD

* Why   Trustee request

Release date   2021

Embargoed	true false

NEW

* Why

Release date

[Submit]

For example:

Editing record **1** for batch: **WRYSADBA2.CSV** (Captainkirk) in **Other Transcript** of **St Chad** in **Saddleworth** of **Yorkshire, West Riding**

Embargo status

Embargoed	true false

* Why   Trustee request

Release date   2021

Embargoed	true false

* Why   trustee reversal

Release date   2019

And we see the result (I had actually done it twice!!

File line number	1
Line id	Captainkirk.WRYSADBA2.CSV.1
Processed date	15 Dec 2019
History of embargo changes	true Captainkirk 15 Dec 2019 Trustee request
History of embargo changes	false Captainkirk 15 Dec 2019 trustee reversal
History of embargo changes	false Captainkirk 15 Dec 2019 trustee reversal