

Approved Storage Transfers – EDM Americas

1. Do you have a current account with EDM Americas?
 - a. Yes – Move to Step 2
 - b. No – Visit the Storage Account Creation page to request one and then wait for confirmation

2. Are your boxes entered into the University Records Management Application (URMA)?
 - a. Yes – Move to Step 3
 - b. No – You must enter boxes into URMA before you can transfer them to EDM Americas.
 - i. URMA access requires the following (see URMA Account Creation Page for more information):
 1. Attendance at a “Records Management for...” class
 2. Attendance at an URMA training class or one-on-one session
 3. Supervisor authorization

3. Request a pick-up through URMA
 - a. Log-in and locate the records you wish to transfer on the Home Page
 - i. TIP – search all boxes assigned to your Organization by putting % in the Organization Assigned search field
 - b. Click the checkbox on the left for each box you wish to transfer to EDM Americas
 - c. Click the Activity menu and select Request Pickup
 - d. Click the orange Search button (do not enter anything into search box)
 - e. Click Storage Locations tab
 - f. In Facility Name field, type EDM%
 - g. Click the green Search button below
 - h. Click the radio button next to “EDM Americas” in the results display
 - i. Click Apply All
 - j. The search box will now be filled with the numerical identifier for the EDM Americas location
 - k. Add comments (if needed) to the Comments text box
 - l. Click the green Request button
 - m. The Request Results screen will appear noting the number of requests and whether they were successful. Click OK.

4. URMA will generate a notification to Records Management Office staff. You will be contacted shortly to confirm your request.

5. Records Management Office staff will send your labels through messenger mail with instructions for affixing them. A list of barcode numbers will accompany the instructions.
 - a. VERY IMPORTANT – affix the correct EDM label with the associated URMA box number on the list

6. Contact the Records Management Office at records@virginia.edu once your labels have been affixed

7. The Records Management Office will then schedule the pick-up with EDM
 - a. Pick-up day is Friday, between roughly 9:30 AM and 11:30 AM
 - b. Requests must be made by Thursday morning for Friday pick-up

8. Email records@virginia.edu to confirm that the boxes were picked up