

URMA


University Records Management Application

Updated October 2015

USING URMA

Section III:

Tips and Tricks page 2



ISPRO
Information Security, Policy, and Records Office

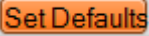
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TIPS AND TRICKS

- ❖ **Basic Flow of Data:** To get the most benefit from URMA and the University's Record Management process, be sure to utilize the full functionality of the on-line system, as well as taking advantage of the contracts in place for off-site storage.
 - Enter a record in URMA.
 - Print a label for the storage box (if a physical record; not needed for electronic records).
 - Move the records you've entered to storage. Make sure the location is accurately reflected in URMA.
 - When the records have met disposition requirements, follow the instructions for disposing or archiving these records.

- ❖ Every item created in URMA (user, record, storage location, etc.) is automatically assigned an **URMA Tracking Number**. When you create records, the URMA Tracking Number is also the box number in URMA. You may occasionally see the term BARCODE used interchangeably with Tracking Number.

- ❖ When entering data, fields identified with an asterisk (*) are required.

- ❖ Entered values can be set as **default values** when creating new records by clicking the  button. (Ex: If you enter mostly PHYSICAL records, you may want to set that as a default).

- ❖ **Error Messages** appear at the top of the Create screen. If the system will not accept your record, simply scroll to the top to see which field needs to be corrected.

- ❖ There are times that **additional (pop-up) windows** need to be displayed in URMA. Check your browser settings to allow pop-up windows for the Infolinx application.

- ❖ Location information is visible on the *View a Record* screen. Notice that the **CURRENT LOCATION** defaults to the User entering the record (meaning the records are with you). Whenever you "move" records to another location, either in-office, on-site, off-site or to a Records Management Office-managed vendor site, be sure to mark the new site as the new Home location.

- ❖ There are **multiple ways to accomplish the same task** in URMA. You will quickly discover which method works best for you.