

# URMA

## University Records Management Application

Updated October 2015

# USING URMA

## Section IV:

### Entering Physical Standard Records



# ENTERING RECORDS

REMEMBER that records entered into URMA will be classified by **STORAGE TYPE** and then by **RECORD TYPE**.

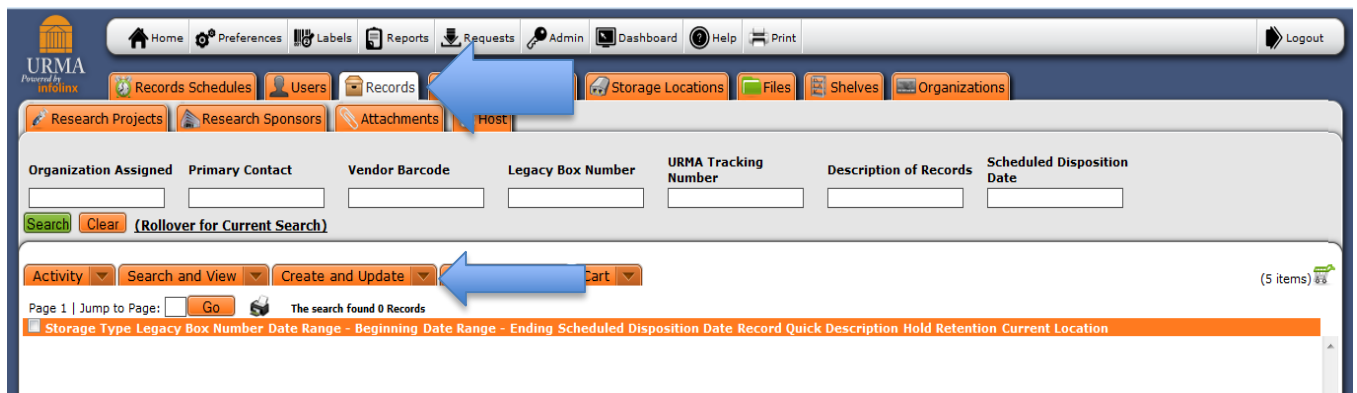
**STORAGE TYPE** is either **PHYSICAL** or **ELECTRONIC**.

All records, either Physical or Electronic, must then be classified by **RECORD TYPE: Standard** or **Research**. (Another Record Type, **Facilities Management**, is only used by a small group for specialized purposes, so this documentation only details the use of Standard and Research record types.)

While a few users will need to enter both Standard and Research records, most URMA users will only be entering one or the other. A lot of the needed information is the same for both, but Research records require additional information about the Sponsor and Study.

Once you learn how to enter PHYSICAL STANDARD or PHYSICAL RESEARCH records, it is very simple to transfer that knowledge to entering the ELECTRONIC versions of both record types.

## ENTERING PHYSICAL STANDARD RECORDS



Select **RECORDS** on the Item Type tabs menu.

Click the down arrow on the **Create and Update** action button and select **CREATE**. This screen will be displayed:

Fields marked with an \* are required.

\*Storage Type: Physical

\*Container: Records Box (10 x 12 x 15)

Vendor Barcode: \_\_\_\_\_

Legacy Box Number: \_\_\_\_\_

\*Organization Assigned: IT-Info. Secty, Pol. & Recds

\*Physical Storage Type: Standard

\*Record Type: Standard

Records Series Assistance: No

Records Series:

Record Series Number	Record Series Name	Records Series Description	Official Recordkeeper	Schedule Category	Office(s) Involved
Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.					

Attachment:

Description of Records: \_\_\_\_\_

Identifying Number: \_\_\_\_\_

\*Date Range - Beginning: mm/dd/yyyy

\*Date Range - Ending: mm/dd/yyyy

Retention Trigger Date: mm/dd/yyyy

Disposition Date Assistance: No

Scheduled Disposition Date: \_\_\_\_\_

\*Primary Contact: sel5b

Computing ID	Role	First Name	Last Name	Supervisor's UVA Computing ID	Primary Organization
Current Search: There is no current Primary Contact query. To search Primary Contact, enter your criteria and click the Search button.					
sel5b	Records Administrator	Sue	Breedon	IK21	22011 - IT-Info. Secty, Pol., & Recds

COMPLETE THE FIELDS AS FOLLOWS:

**Storage Type** = Physical

**Container** = May be a records box, microfilm box, map/drawing tube or archival box. If the container is other than a standard records box, use the drop down box to select the correct option.

**Vendor Barcode** = The barcode number on the vendor-provided labels placed on boxes being stored with a Records Management Office-approved vendor storage service. Note: This is typically left blank until boxes are moved to storage.

**Legacy Box Number** = Department/unit box number on the box; could also be the box number from the legacy URMA system located on a label of the box. Leave blank if you do not have one. Will be helpful in future identification of the box.

**Organization Assigned:** The five-digit org number for your unit or unit for the boxes (usually the last five digits of a PTAO); will default to the *Primary Org* listed on user profile, but may be changed to any other ORG also listed on the user profile.

**Physical Storage Type:** The system defaults to Standard and you should not change this unless you have contacted the Records Management Office at [urma-help@virginia.edu](mailto:urma-help@virginia.edu) and discussed the storage of archival records.

**Record Type:** Select STANDARD.

**Record Series Assistance:** If unsure which **Record Series** to use, change **Record Series Assistance** to **YES**. An email will be sent to the Records Management Office. Someone will respond within two business days to assist you.

**Record Series:** This area is used to identify the correct records series as identified in the [Records Retention and Disposition Schedules](#). Enter search criteria in any of the fields to locate the correct record series. Be sure to begin and end your search criteria with the % wildcard (place the % symbol on either side of the search term: e.g., %payroll%). Simply click the radio button next to the correct record series and the record series number will be displayed above.

**Attachment:** A document (created outside the URMA system) which lists specific information on what is included in this URMA record; e.g., a box inventory. Attachments CANNOT contain any Personally Identifiable Information (PII), any information protected under HIPAA, or any other highly sensitive data. URMA will be scanned regularly to ensure that all attachments comply with this requirement.

- Allowable formats for attachments are **Excel, Word, PDF, and TXT files**.
- Only ONE attachment per record, however, the same attachment can be attached to multiple records.
- Attachments cannot be added using Bulk Create.
- Access is restricted by ORG (just as when viewing a Record, etc).
- Clicking on the attachment file name may open the document in a second window AND/OR download the attachment to your computer. The behavior is dependent on the browser and the version of the browser you are using.
- See **URMA User Instructions/ATTACHMENTS** for details about adding and deleting attachments.

**Description of Records:** A short description (in your words) of the records which may include more information on the records housed in the box – including a file listing or other identifying information. Although not required, adding details to this box will help you more easily identify these records (limit of 500 characters).

**Identifying Number:** Ad hoc field used by the department for a specific project number, account number or ID number associated with the records entered; can be left blank.

**Date Range – Beginning:** Start date for the records in the box - date range should be listed as MM/DD/YYYY. If you only know MM/YYYY, use the first day of the month for the day.

**Date Range – Ending:** The end date for the records in the box - date range should be listed as MM/DD/YYYY. If you only know MM/YYYY, use the last day of the month for the day (ex. 30, 31).

**Retention Trigger Date:** The date the retention clock starts. If the selected Record Series has a defined retention, this field is not used. Other record series may require a Trigger Date to be entered, such as the date an employee leaves the


University (for personnel records) or graduation/withdrawal date (for student records), for example. This date may not be known until after Records have been entered into URMA and stored.

**Disposition Date Assistance:** If you need assistance with **Scheduled Disposition Date**, change **Disposition Date Assistance** to **YES**. An email will be sent to the Records Management Office. Someone will respond within two business days to assist you.

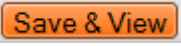
**Scheduled Disposition Date:** Will be calculated according to the record series selected. Information cannot be entered directly into this field.

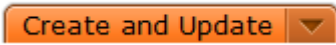
**Primary Contact:** Defaults to your computing ID. It may be changed to another person within the same ORGANIZATION by entering criteria in any of the search fields, then selecting the computing ID of the person to whom these records should be assigned. This person will be the responsible custodian for the records and is the first level of approval for destruction of all records.

You are now ready to save the record:

Clicking on  will save the new record and remain on the *Create Record* screen to create another new record.

Clicking on  will save the new record and return you to the *Home Page*.

Clicking on  will save the record and go to the *View* screen for that record. This is useful if your next step is to take an action on this record such as Print Label or Request Pickup to an approved vendor storage location. It also gives you the opportunity to review the data entered, a good idea especially if you are a new URMA user.

**Should anything need to be changed, select** , **then UPDATE**. Make the necessary changes and be sure to save the record.