

URMA

University Records Management Application

Updated October 2015

USING URMA

Section VI:

Entering Electronic (Standard or Research) Records on Removable Media



ENTERING ELECTRONIC RECORDS (STANDARD OR RESEARCH RECORDS)

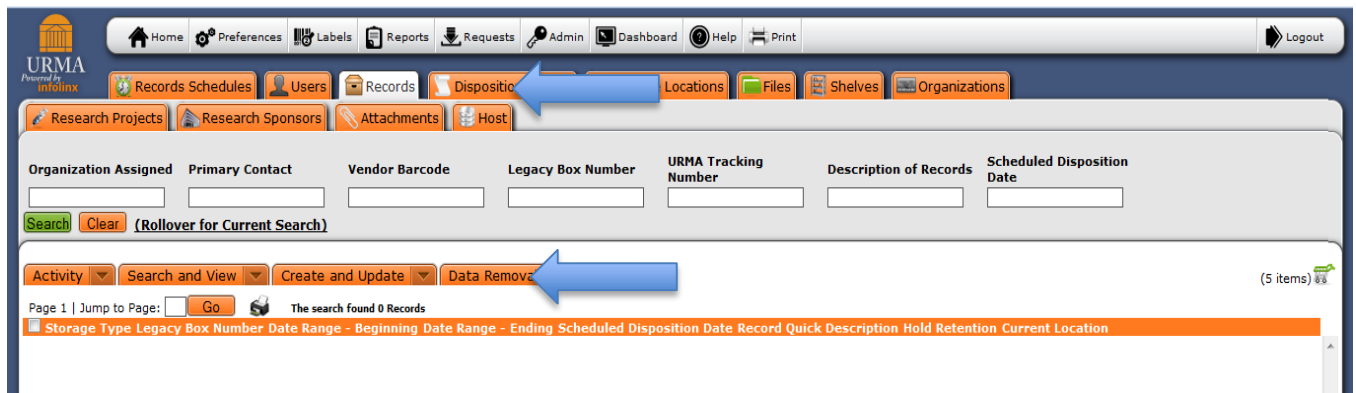
Remember that there are two storage types available in URMA: Physical and Electronic. ELECTRONIC records are digital ones, including electronic office documents, electronic mail (email), data in application databases, etc.

If you are entering ELECTRONIC records, you will need to know if these records are stored on **REMOVABLE MEDIA** (CDs, DVDs, USB sticks, internal hard drive of a laptop or desktop computer, external drive, etc.) or on a **SERVER/SERVICE** (a shared network drive).

If you need assistance determining any of the data needed to complete the entry, please contact your LSP or technical support person in your department.

Electronic Records on Removable Media

- Select **RECORDS** on the Item Type tabs menu.
- Click the down arrow on the CREATE and UPDATE action button and select CREATE.



The screenshot displays the URMA web application interface. At the top, there is a navigation bar with icons for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print, along with a Logout button. Below this is a secondary navigation bar with tabs for Records Schedules, Users, Records, Disposition, Locations, Files, Shelves, and Organizations. The 'Records' tab is selected. Underneath, there are more specific tabs: Research Projects, Research Sponsors, Attachments, and Host. The main content area features a search form with fields for Organization Assigned, Primary Contact, Vendor Barcode, Legacy Box Number, URMA Tracking Number, Description of Records, and Scheduled Disposition Date. Below the search form are buttons for Search, Clear, and a rollover for the current search. A dropdown menu for 'Create and Update' is open, showing options for Activity, Search and View, Create and Update, and Data Removal. A blue arrow points to the 'Create and Update' dropdown. At the bottom, there is a page indicator 'Page 1 | Jump to Page: [] Go' and a message 'The search found 0 Records'. A table header is visible at the very bottom, including 'Storage Type', 'Legacy Box Number', 'Date Range - Beginning', 'Date Range - Ending', 'Scheduled Disposition Date', 'Record Quick Description', 'Hold Retention', and 'Current Location'.

- The *Create a New Record* screen will appear.
- Select ELECTRONIC from the Storage Type drop down box.
- The screen below will be displayed. Notice that the only difference at this point is the addition of the field ELECTRONIC STORAGE TYPE.

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Home Preferences Labels Reports Requests Admin Dashboard Help Print Logout

Create a new Record Save & New Save & View Save & Close Set Defaults Cancel

Fields marked with an * are required.

*Storage Type: Electronic

*Organization Assigned: IT-Info. Sec'y, Pol. & Recds

*Electronic Storage Type: **Removable Media**

*Record Type: Standard

Records Series Assistance: No

Record Series Number	Record Series Name	Records Series Description	Official Recordkeeper	Schedule Category	Office(s) Involved
Search Here: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>					
Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button. Search Clear					

Description of Records:

Identifying Number:

*Date Range - Beginning: mm/dd/yyyy

*Date Range - Ending: mm/dd/yyyy

Using the drop down arrow, select **Removable Media** for the Electronic Storage Type.

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Home Preferences Labels Reports Requests Admin Dashboard Help Print Logout

Create a new Record Save & New Save & View Save & Close Set Defaults Cancel

Fields marked with an * are required.

*Storage Type: Electronic

*Organization Assigned: IT-Info. Sec'y, Pol. & Recds

*Electronic Storage Type: Removable Media

*Size:

*Units:

*Data Custodian:

*Record Type: Standard

Records Series Assistance: No

Record Series Number	Record Series Name	Records Series Description	Official Recordkeeper	Schedule Category	Office(s) Involved
Search Here: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>					
Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button. Search Clear					

Description of Records:

Identifying Number:

At this point, you will need to enter the
SIZE (a number limited to 9 digits),
UNITS (KB, MB, GB, TB),
DATA CUSTODIAN (where the removable media is actually stored).

Please note that the remaining fields are identical to those used when entering **PHYSICAL** Records. If you are entering **Electronic Standard Records**, refer back to **Section IV (Entering Physical Standard Records)** and follow those instructions if you need assistance in completing the remaining fields. If you are entering **Electronic Research Records**, refer back to **Section V (Entering Physical Research Records)** and follow those instructions if you need assistance in completing the remaining fields.