

# URMA

## University Records Management Application

Updated October 2015

# USING URMA

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**ISPRO**  
Information Security, Policy, and Records Office

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# ENTERING ELECTRONIC RECORDS (STANDARD OR RESEARCH RECORDS)

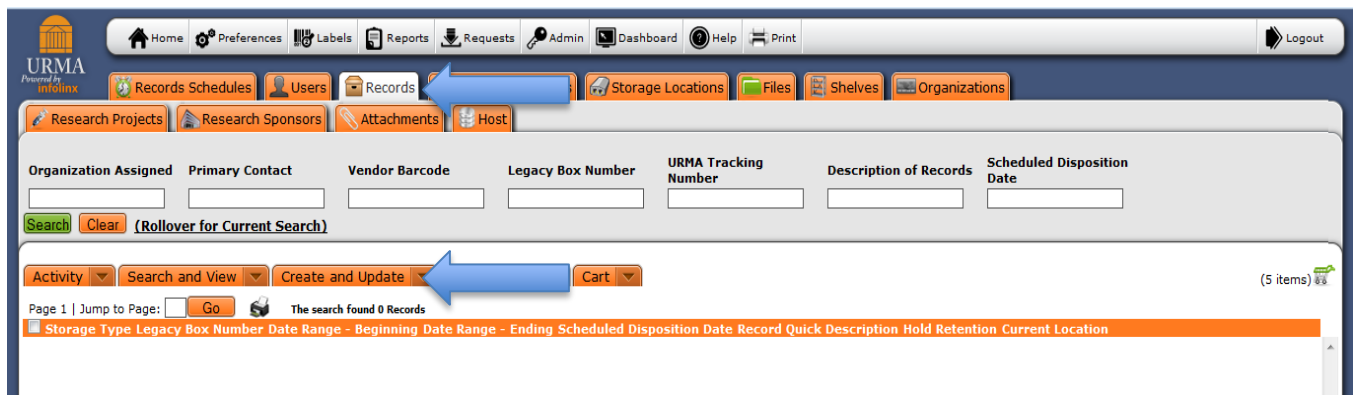
Remember that there are two storage types available in URMA: Physical and Electronic. ELECTRONIC records are digital ones, including electronic office documents, electronic mail (email), data in application databases, etc.

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 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 Server/Service

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



- 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.

Fields marked with an \* are required.

\*Storage Type:

\*Organization Assigned:

\*Electronic Storage Type:

\*Record Type:

Records Series Assistance:

Records Series:

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. <input type="button" value="Search"/> <input type="button" value="Clear"/>					

Description of Records:

Identifying Number:

\*Date Range - Beginning:

\*Date Range - Ending:

Detection Trigger Date:

Using the drop down arrow, **select Server/Service** for the Electronic Storage Type.

Fields marked with an \* are required.

\*Storage Type:

\*Organization Assigned:

\*Electronic Storage Type:

\*Host:

Server/Service Name	Organization	Administrator/Contact Name
<input type="radio"/> Records Mgmt Space - ITS ES3	22011 - IT-Info. Sec'y, Pol., & Recds	Lori Kressin
<input type="radio"/> Records Management - ISPRO ES1	22011 - IT-Info. Sec'y, Pol., & Recds	Marty Peterman

\*File/Folder Path:

\*Size:

\*Units:

\*Record Type:

At this point, you will need to enter the

**HOST** (name of server where data resides). HOSTS are limited by ORG CODES so only HOSTS specific to your organization will be displayed. If no HOSTS are listed from which to choose, you will need to ADD the HOST. (See instructions below).

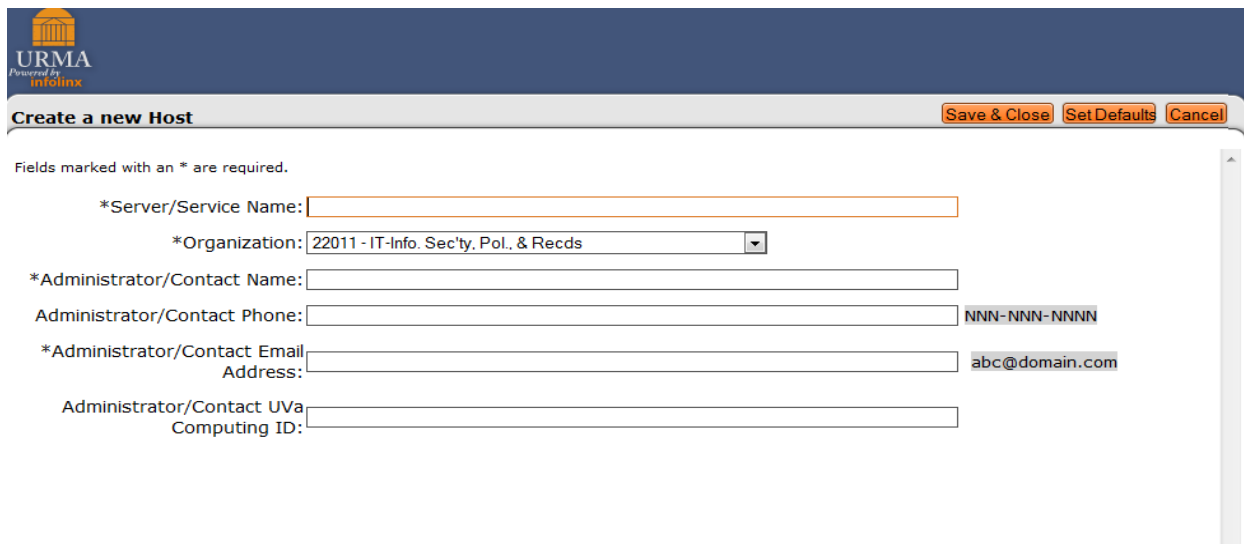
**FILE/FOLDER PATH** (the location on the host where the records are located; generally a directory and file name).

**SIZE** (a number limited to 9 digits).

**UNITS** (KB, MB, GB, TB ).

To Add a Host from this screen, click on the ADD button next to the Host field.

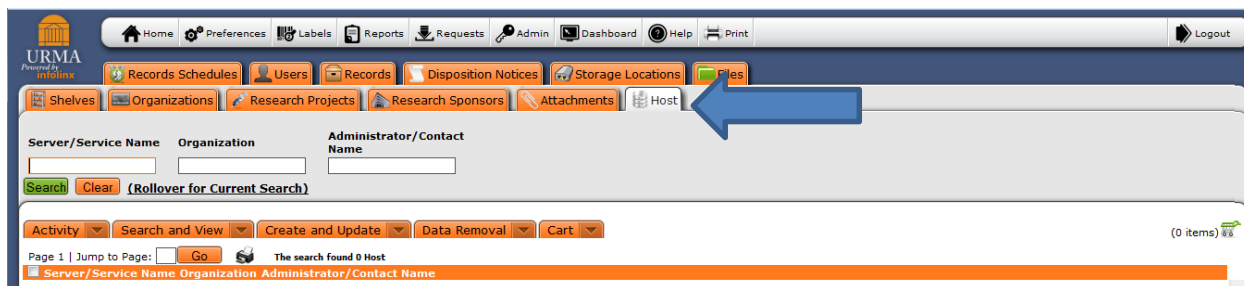
The Create a New Host screen will be displayed:



The screenshot shows a web browser window titled "Create a new Host" with a dark blue header containing the URMA logo and navigation buttons: "Save & Close", "Set Defaults", and "Cancel". Below the header, a note states "Fields marked with an \* are required." The form contains several input fields: "\*Server/Service Name:" (text box), "\*Organization:" (dropdown menu with "22011 - IT-Info. Sec'ty, Pol., & Recds" selected), "\*Administrator/Contact Name:" (text box), "Administrator/Contact Phone:" (text box with "NNN-NNN-NNNN" as a placeholder), "\*Administrator/Contact Email Address:" (text box with "abc@domain.com" as a placeholder), and "Administrator/Contact UVA Computing ID:" (text box).

Be sure to fill in the information as completely as possible. The **ADMINISTRATOR** for the host is the LSP or IT professional who provides technical assistance with the server space.

A new host may also be added before creating your Record by selecting **HOST** on the Item Type Tabs menu:



The screenshot shows the main interface of the URMA system. 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 Notices, Storage Locations, and Files. A third navigation bar contains tabs for Shelves, Organizations, Research Projects, Research Sponsors, Attachments, and Host. A blue arrow points to the Host tab. Below the navigation bars, there is a search area with input fields for "Server/Service Name", "Organization", and "Administrator/Contact Name", and buttons for "Search", "Clear", and "(Rollover for Current Search)". At the bottom, there are dropdown menus for "Activity", "Search and View", "Create and Update", "Data Removal", and "Cart". The page number "Page 1" and a search result summary "The search found 0 Host" are also visible.

Click the down arrow on the CREATE and UPDATE action button and select CREATE. The Create a Host screen will be displayed, as described above. Again, be sure to fill in the information as completely as possible.

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.