

Creating Electronic Records

1. Start on the Records tab.
2. Click Create.

The screenshot shows the Gimmel application interface. The top navigation bar includes Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, and Print. Below this is a secondary navigation bar with Records Series, Users, Records, Disposition Notices, Locations, and Files. The main content area is titled 'Research Sponsors' and contains a form with the following fields: Records Barcode, Organization, Legacy Box Number, Vendor Barcode, Description of Records, Scheduled Destruction Date, and Primary Contact. Below the form are buttons for Search, Clear, (Rollover for Current Search), and Switch. At the bottom of the form is a row of buttons: Create, Update, Request Pickup, Request Delivery, Transfer, Transfer Home, Print Labels, and Add To Cart. An orange arrow labeled '1' points to the 'Records' tab in the top navigation bar. Another orange arrow labeled '2' points to the 'Create' button at the bottom of the form.

- All fields with an asterisk (*) are required. The Record will not save if any required fields are left blank.

Setting Defaults

URMA no longer automatically populates information in any field, including Organization and Primary Contact. If you typically enter the same information in certain fields each time you create Records, you should Set Defaults for these fields. All Records you enter will automatically default to the values you selected for these fields going forward.

1. Enter information in the fields you wish to set as defaults.
2. Click Set Defaults button at top/right.

The screenshot shows a dialog box with a title bar and three buttons: Cancel, Set Defaults, and Save & Close. An orange arrow points to the Set Defaults button.

- Defaults can be:
 - Set on any field.
 - Updated/deleted using the procedure above.
 - Overridden by deleting text or using the Clear button in the fields you wish to change.

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Field-by-Field Data Entry

Organization: Search for your Organization by the name or number. If you have a Default set, it will auto-populate.

*Organization:

Organization Code	Organization Name
Search Here: <input type="text"/>	<input type="text"/>
Current There is no current Organization query. To search Organization, enter your criteria and click the Search button.	
Search:	

Record Series: URMA automatically displays all available Record Series once an Organization is selected. Use the search fields to locate and select the series.

Records Series:

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

Primary Contact: Search for and select the Primary Contact for the records (must be an URMA user). If you have a Default set, it will auto-populate.

*Primary Contact:

Computing ID	First Name	Last Name
Search Here: <input type="text"/>	<input type="text"/>	<input type="text"/>
Current There is no current Primary Contact query. To search Primary Contact, enter your criteria and click the Search button.		
Search: <input type="button" value="Search"/> <input type="button" value="Clear"/>		

Storage Type: Select Electronic for records stored on servers.

Vendor Barcode: Leave blank.

Legacy Box Number: Enter a number only if you have a numbering system you wish to retain.

Electronic File/Folder Path: Enter the full file/folder path of their location.

Electronic File Size in MB: Enter the size of the file in megabytes only. (Convert from KB, GB, or TB if needed).

Record Type: Select Standard for all non-research records, including research financial records. For research records, select Research and see *Creating Research, Sponsors, Projects & Records* for more information.

Description of Records: Enter any pertinent information that might aid in searching/locating Records later. Make sure information is not duplicated elsewhere.

Identifying Number: Leave blank unless you have another number or identifier you wish to retain.

Date Range - Start: Enter the start date of the records.

Date Range - End: Enter the end date of the records.

Retention Trigger Date: The date the retention clock starts. A date must be entered here for URMA to calculate the Scheduled Disposition Date.

- For series that run on the fiscal year, enter the last day of the fiscal year (06/30/YYYY).

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- For series that run on the calendar year, enter the last day of the calendar year (12/31/YYYY).

Override Scheduled Disp. Date: Leave blank; for RIM Office use.

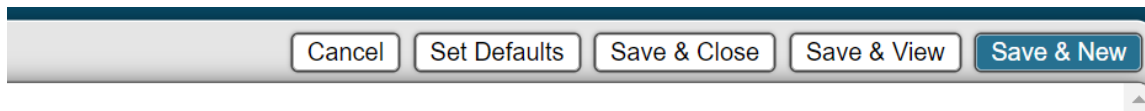
Attachment: Attach a content listing or other information about the records by clicking Add, if applicable.

Attachment:

File Extension	Create Date	File Name
Search Here: <input type="text"/>	<input type="text"/>	<input type="text"/>

Current Search: There is no current Attachment query. To search Attachment, enter your criteria and click the Search button.

Saving a Record



Cancel Set Defaults Save & Close Save & View Save & New

Save & Close: takes you back to the Home Page Grid

Save & View: takes you to the record you just created

Save & New: opens a new data entry screen