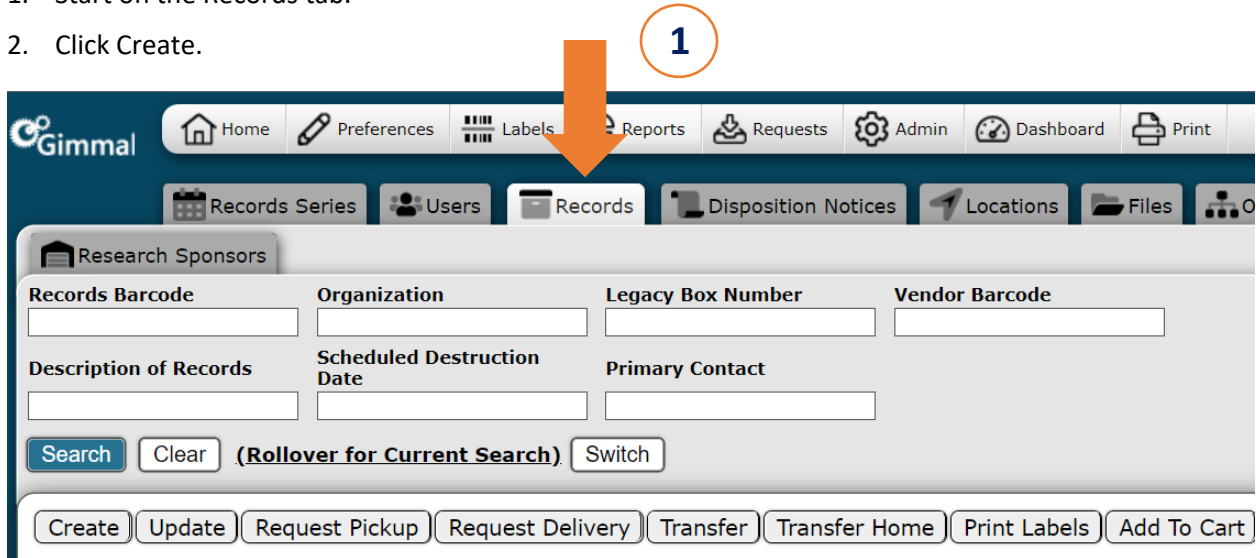


## Creating a Box Record in URMA

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



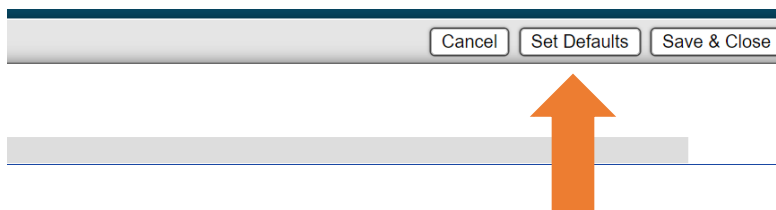
The screenshot shows the Gimmel URMA interface. At the top, there is a navigation bar with icons for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, and Print. Below this is a secondary navigation bar with icons for Records Series, Users, Records, Disposition Notices, Locations, and Files. The main content area is titled 'Research Sponsors' and contains several input fields: Records Barcode, Organization, Legacy Box Number, Vendor Barcode, Description of Records, Scheduled Destruction Date, and Primary Contact. Below these fields are buttons for Search, Clear, (Rollover for Current Search), and Switch. At the bottom of the form, there 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 secondary navigation bar. Another orange arrow labeled '2' points to the 'Create' button.

- 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 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.

## Creating a Box Record in URMA

### 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"/>
<small>Current</small> There is no current Organization query. To search Organization, enter your criteria and click the Search button.	
<small>Search:</small>	

**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"/>
<small>Current</small> There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.				
<small>Search:</small> <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"/>
<small>Current</small> There is no current Primary Contact query. To search Primary Contact, enter your criteria and click the Search button.		
<small>Search:</small> <input type="button" value="Search"/> <input type="button" value="Clear"/>		

**Storage Type:** Select Physical for boxed records. See *Creating Electronic Records* for specific instructions for records stored on servers.

**Vendor Barcode:** Leave blank. RIM Office will enter vendor numbers if you use off-site storage.

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

**Electronic File/Folder Path:** Leave blank.

**Electronic File Size in MB:** Leave blank.

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

**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 Destruction Date.

- For series that run on the fiscal year, enter the first day of the next fiscal year (07/01/YYYY).

### Creating a Box Record in URMA

- For series that run on the calendar year, enter the first day of the next calendar year (01/01/YYYY).
- For series that don't specify fiscal or calendar year, enter the same value as the Date Range – End field.

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

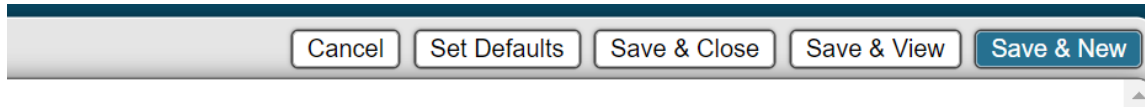
**Attachment:** Attach a content listing or other information about the records by clicking Add, if applicable.

Attachment: Add

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

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

### 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