

Storage Transfers to Patterson Pope

Do you have a current account with Patterson Pope?

- Yes – Move to next question.
- No – Visit the [Storage Account Creation](#) page to request one and then wait for confirmation.

Are your boxes entered into the University Records Management Application (URMA)?

- Yes – Move to **Request the pick-up through URMA**
- No – You must enter boxes into URMA before you can transfer them to Patterson Pope.
 - URMA access requires the following (see [URMA Account Creation](#) page for more information):
 - Take [Records & Information Management Basics](#) on-demand course.
 - [Obtain supervisor authorization](#).
 - Attend an URMA Hands-on session. Email records@virginia.edu to schedule.

Request the pick-up through URMA

1. Locate the records you wish to transfer on the Records tab.
 - Note: search all boxes assigned to your Organization(s) by putting the cursor in any Quick Search field and hitting Enter.
2. Click the checkbox on the left for each box you wish to transfer to Patterson Pope.
3. Click Request Pickup

The screenshot shows the Gimmel URMA interface. At the top, there are navigation tabs: Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, and Print. Below these are more specific tabs: Records Series, Users, Records, Disposition Notices, Locations, Files, Organizations, and Research Projects. The main content area is titled 'Research Sponsors' and contains several search filters: Records Barcode, Organization, Legacy Box Number, Vendor Barcode, Description of Records, Scheduled Destruction Date, and Primary Contact. Below the filters are 'Search', 'Clear', and '(Rollover for Current Search) Switch' buttons. A row of action buttons includes 'Create', 'Update', 'Request Pickup', 'Request Delivery', 'Transfer', 'Transfer Home', 'Print Labels', 'Add To Cart', 'Search', 'View', and 'Change'. Below the buttons is a 'Page 1 | Jump to Page: [] Go' field and a message 'The search found 19 Records'. A table below shows a list of records with columns for 'Record Quick Desc', 'Legacy Box Number', 'Date Range - Start', and 'Date Range - End'. The first record is checked and has the text '0000024827 - State Historical Funds Financial Records [cw8de - Caroline Walters]'. Three numbered callouts with arrows point to: 1. The search filters, 2. The 'Request Pickup' button, and 3. The checkbox in the first row of the records table.

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4. Click Locations tab
5. In Location/Server Name field, type Patt
6. Click Search button below.

Request Items to be refilled

Items to be refilled:

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Change Destination	Record Description	Current Location	Home Location	Destination
<input type="button" value="Apply"/>	0000024827 - State and Local Funds Financial Records [cw8de - Caroline Walters]	cw8de - Caroline Walters		

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Location/Server Name	Storage Unit/Room Number	Location Type
<input type="text" value="Patt"/>	<input type="text"/>	<input type="text"/>

5 6 4

7. Click the button next to "Patterson Pope" in the results display
8. Add comments, if needed to the Comments text box.
9. Click Apply All.
10. Click Request Pickup.

Request Items to be refilled

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Patterson Pope -

Location/Server Name	Storage Unit/Room Number	Storage Location Type	Location Type
<input type="text" value="Patt"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Page 1 | Jump to Page: Go The search found 1 Location

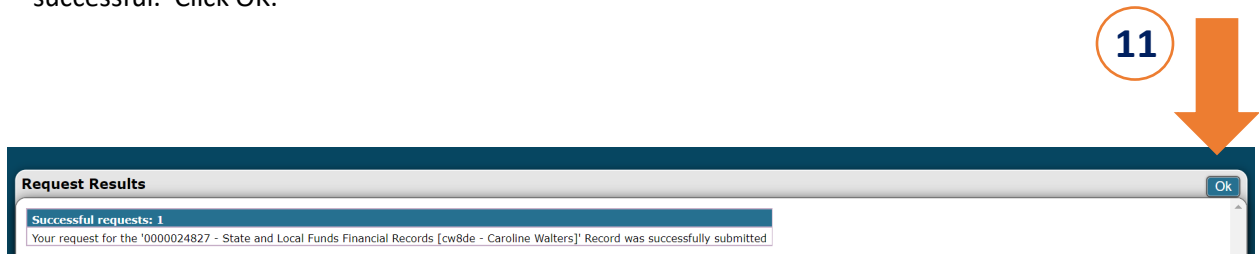
Location/Server Name	Storage Unit/Room Number	Storage Location Type	Location Type
<input checked="" type="radio"/> Patterson Pope		Approved	Physical

Comments:

10 9 8 7

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11. The Request Results screen will appear noting the number of requests and whether they were successful. Click OK.



12. URMA will generate a notification to Records & Information Management (RIM). A staff member will contact you to confirm your request.
13. RIM will send your barcodes through messenger mail with instructions for affixing them. A list of barcode numbers will accompany the instructions.
14. Affix the correct Patterson Pope barcode with the associated URMA box number on the list.
15. Contact RIM at records@virginia.edu once your labels and barcodes have been affixed.
16. RIM will contact Patterson Pope, who will then contact the requestor directly to set-up a pick-up date/time.
17. Email records@virginia.edu to confirm that the boxes were picked up.