

# URMA

## University Records Management Application

Updated October 2015

# USING URMA

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

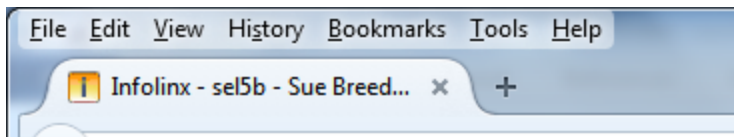
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[records@virginia.edu](mailto:records@virginia.edu)  
[www.virginia.edu/recordsmanagement](http://www.virginia.edu/recordsmanagement)

# SCREEN LAYOUTS

Below is the **HOME PAGE GRID** screen in URMA. Although this screen is displaying a *list of records*, most of the screens in URMA are organized the same way.

Level of access to any particular function will vary depending on your **ROLE**.



Hover over the Infolinx tab at the top of your screen to see your computing ID, name, primary org code and role.

Notice that the screen is divided into sections:

A screenshot of the URMA Home Page Grid screen. The screen is divided into several sections, each highlighted with a blue callout box and an arrow pointing to it. The sections are: 'Top Level/Navigation' (pointing to the top navigation bar), 'Item Type Tabs' (pointing to the tabs below the navigation bar), 'Quick Search Area' (pointing to the search fields), 'Action Items' (pointing to the activity and search buttons), 'Click box to select' (pointing to a checkbox in the table), and 'Home Page Grid' (pointing to the table of records). The table has columns for 'Storage Type', 'Date Range - Beginning', 'Date Range - Ending', 'Scheduled Disposition Date', and 'Record Quick Description'. The table contains 10 rows of records, all with 'Physical' storage type and 'Agendas and Meeting Schedules (Board of Visitors)' as the record description. The search results show 'The search found 47 Records'.

**Top Level/Navigation Menu** – Provides access to the various indicated functions. These links are always available throughout the application and are used to quickly jump to a particular section of URMA.

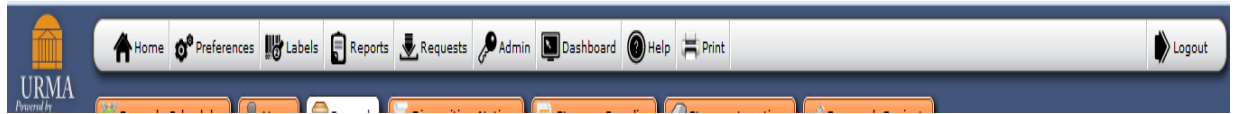
**Item Type Tabs** – These are the types of items URMA is tracking; selecting the tab allows you to search, create, update, or perform other activities. May also be referred to as a **DATA VIEW** (Boxes, Records, Retention Schedules).

**Quick Search Area** – Used to enter search criteria for an item type; **'%' is the wild card for any search within URMA.** This means that, by putting a '%' mark on either side of a search term, the system will search for anything with that combination of letters or numbers (e.g., searching %Roche% in the Primary Sponsor field will return results for "Roche," "Hoffman-La Roche," "F. Hoffman-La Roche," etc. **NOTE:** it is often helpful to search before entering an item, such as storage location, to ensure that the item has not already been entered.

**Action Items** – May be drop down boxes; click to execute specific actions on items matching the search criteria (such as create, update, transfer and labels).

**Home Page Grid** – Displays records matching a given search; click column headings to sort results in either ascending or descending order.

## TOP LEVEL/NAVIGATION TABS



**HOME:** Return to the URMA Home Page – the start page for the application.

**PREFERENCES:** Refers to various settings or options that can be set for the application; are grouped into two categories (General and Item Types). Clicking a Preference will display three values: SCOPE, DESCRIPTION, and VALUE. Items that are grayed out cannot be updated by the user.

**Scope** - The four scopes in URMA are:

- **System** - applies to everyone in the entire system;
- **User** - applies to a user regardless of where they may log in;
- **Role** - preference can be configured independently by role;
- **Workstation** - applies only to a specific computer.

**Description** – Brief description of setting or option.

**Value** - This is the value that is currently set for a preference. It is displayed in the text box or drop down next to the preference description. If no value has been set for this preference, the default value (which may be blank) is displayed.

**LABELS:** Manage label queues (after you have requested labels through the Activity action tab for specific records).

**REPORTS:** Access to standard and custom reports available in URMA; reports can be displayed in either PDF or EXCEL format.

**REQUESTS:** Lists options to display either BOX or FILE requests. URMA will display all requests for which you have rights to view; reduce the list by using the quick search fields above the grid.

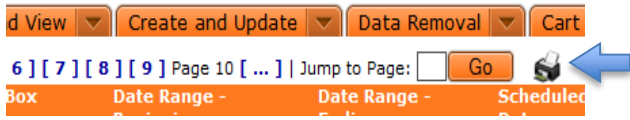
**ADMIN:** Use to change your password in URMA. All other items can only be modified by URMA administrators.

**DASHBOARD:** Brings up “My Home Page” screen, displays

- **ITEMS** - all items currently checked out to the logged in user;
- **REQUESTS** - all outstanding requested items;
- **PREFERENCES** - preferences that can be customized;
- **USERS** – all users within the ORGS to which you also have access.

**HELP:** Online Help for application. Please keep in mind that this feature is very general. UVa's implementation has been modified to meet the needs of our regulations and policies and will likely **not** match the online help information.

**PRINT:** Print Screen function – prints current screen only. If there are multiple screens, use the PRINT GRID icon



to print your entire found set.

## ITEM TYPE TABS

These tabs identify all the different ITEMS that are tracked in URMA.

**RECORDS SCHEDULES:** The [Records Retention and Disposition Schedules](#) approved by the Library of Virginia for use by the University of Virginia.

**USERS:** Listing of all accounts in URMA, filtered by your associated ORGANIZATIONS.

**RECORDS:** Information regarding physical and electronic records, filtered by your associated ORGANIZATIONS. Allows you to search for a specific set of records, edit your records, request pickup, transfer to a different location, print box labels, etc.

**DISPOSITION NOTICES:** Identifying records which have met requirements for retention, are not on legal hold, and are therefore eligible to be destroyed.

**STORAGE LOCATIONS:** In-office, on-site, and off-site locations where physical records are stored; may be contracted storage vendors managed by the Records Management Office.

**RESEARCH PROJECTS:** Sponsored grants and contracts, administered by the Office of Sponsored Programs.

**RESEARCH SPONSORS:** Sponsors of grants and contracts, administered by the Office of Sponsored Programs.

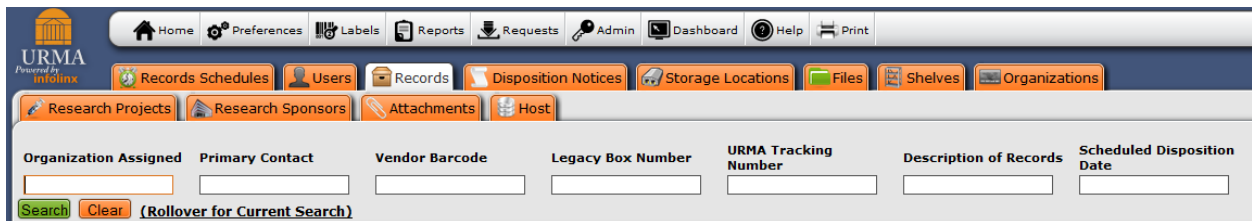
**ATTACHMENTS:** Identifies the record and attachment (i.e. box list) that is associated with that record. Can also attach a document to a record while using the "Create" or "Update" actions.

**HOST:** Shared storage space (servers) on a network for electronic files.

## QUICK SEARCH AREA

Quick Search is the quickest and easiest way to search for items. There is a quick search area for each **item type** tracked in URMA. To access the quick search, first click on the item type you would like to search for in the Item Type Tabs.

An example of the quick search area for tracking RECORDS:



To use the quick search, enter a value for the field you would like to search by and hit the enter key or click the **Search** button.

**The wild card for searching fields in URMA is the %.** For example, to view all records that begin with **ORG 220**, enter **%220%** in the Organization Assigned field. **ALWAYS** begin and end your search criteria with the %, the wild card in URMA.

Be sure to click the **Clear** button before doing another search

### Search for Any Item Type in URMA (Records, Storage Locations, Users, etc.)

- 1) Click the desired **Item Type Tab** –Records, Retention Schedules, Users, Storage Locations, etc.
- 2) Choose the field(s) in the Quick Search Area you wish to search.
- 3) Enter appropriate search criteria in any one or more of the search fields.

**Remember that the wild card is: %**

- 4) Click the **SEARCH** Button or press **<Enter>**.
- 5) Results will be displayed in the Home Page Grid and will be limited to those items within your ORGS. Exception: ALL Records Schedules will be listed, since they are not restricted to any particular ORGS. You will quickly learn how to define a search for those schedules used most frequently. Be sure to click the **Clear** button to start a fresh search

**Note:** If search returns **no** items, too many items, or incorrect items, modify the search criteria. Check spelling, simplify the search, try fewer or different field(s). Click the **Clear** button to start a fresh search.