

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)

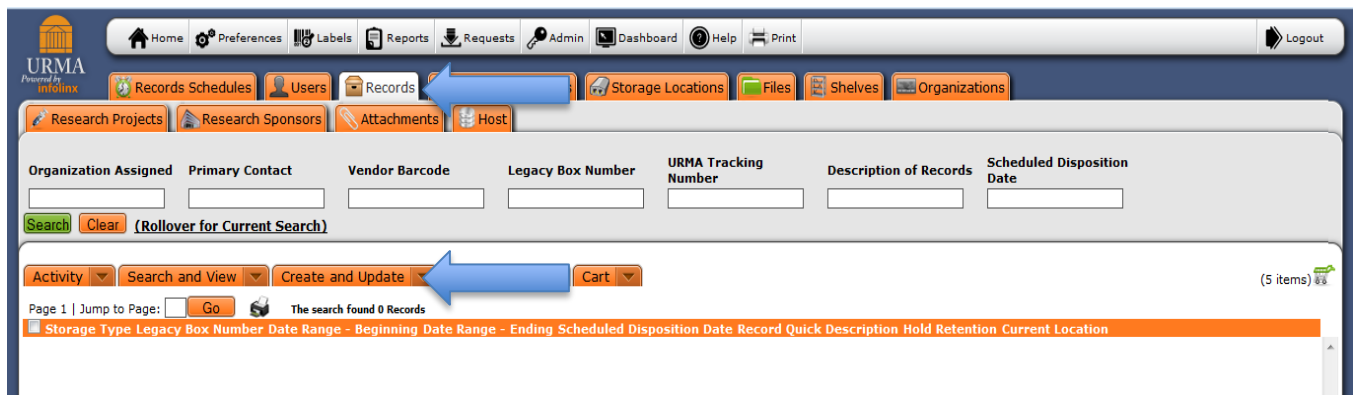
Remember that there are two storage types available in URMA: Physical and Electronic. ELECTRONIC records are digital ones, including electronic office documents, electronic mail (email), data in application databases, etc.

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
Search Here: <input type="text"/> <input type="text"/> <input type="text"/>		
Current Search: There is no current Host query. To search Host, enter your criteria and click the Search button. <input type="button" value="Search"/> <input type="button" value="Clear"/>		
Page 1 Jump to Page: <input type="text"/> <input type="button" value="Go"/>		
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:

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Create a new Host Save & Close Set Defaults Cancel

Fields marked with an * are required.

*Server/Service Name:

*Organization:

*Administrator/Contact Name:

Administrator/Contact Phone:

*Administrator/Contact Email Address:

Administrator/Contact UVA Computing ID:

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:

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Home Preferences Labels Reports Requests Admin Dashboard Help Print Logout

Records Schedules Users Records Disposition Notices Storage Locations Files

Shelves Organizations Research Projects Research Sponsors Attachments Host

Server/Service Name Organization Administrator/Contact Name

Search Clear (Rollover for Current Search)

Activity Search and View Create and Update Data Removal Cart

Page 1 | Jump to Page: Go The search found 0 Host

Server/Service Name Organization Administrator/Contact Name

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.