URMA
University Records Management Application
Updated October 2015

USING URMA

Section VIII:

ISPRO
Information Security, Policy, and Records Office

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BULK CREATE and BULK UPDATE OF RECORDS

URMA provides the functionality to both create and update records in bulk. These records can be PHYSICAL or ELECTRONIC storage, and either STANDARD or RESEARCH records.

BULK CREATE OF RECORDS

This function is useful if you need to enter multiple boxes or DVDs of the same record series and/or the same research project.

Select RECORDS from the Item Type tabs:
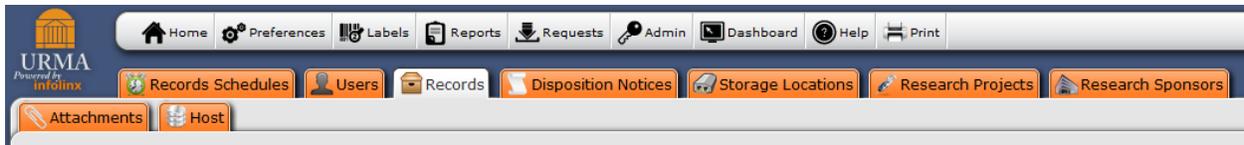
Click on **Create and Update** and select BULK CREATE to display the screen below. Notice the first field displayed is NUMBER OF ITEMS TO CREATE. Simply enter the number of boxes you want to create and then complete the screen per the instructions outlined in **Section IV** for Standard records or **Section V** for Research records.

In the example below, 10 boxes of **Physical Standard** records are being created. Remember, however, you can also do a bulk create for ELECTRONIC records.

Bulk Create new Records

Number of items to create: 10

Fields marked with an * are required.

*Storage Type: Physical
*Container: Records Box (10 x 12 x 15)
Vendor Barcode:
Legacy Box Number:
*Organization Assigned: IT-Info. Sec'ty, Pol., & Recds
*Physical Storage Type: Standard

*Record Type: Standard
Records Series Assistance: No
Records Series: 012082

	Record Series Number	Record Series Name	Records Description
Search Here:	012082		

Current Search: Find all Records Series where Record Series Number Starts W

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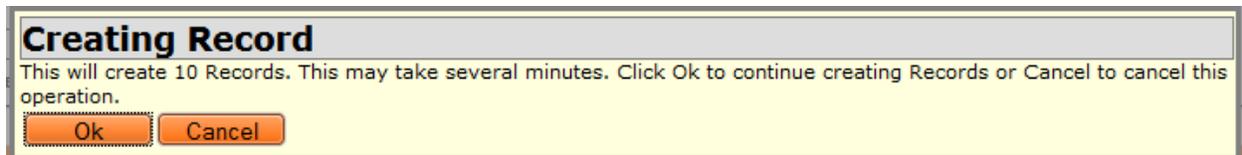| Record Series Number	Record Series Name	Records Series Descriptio
⦿ 012082	State and Local Funds Financial Records	All financial records involving receipts, purchase orders, sh

Description of Records: Test of bulk create 1

Identifying Number:
*Date Range - Beginning: 05/05/2009 mm/dd/yyyy
*Date Range - Ending: 05/05/2012 mm/dd/yyyy
Retention Trigger Date: mm/dd/yyyy
Disposition Date Assistance: No

Click CREATE ITEMS and a message similar to the one below will be displayed:

Creating Record
This will create 10 Records. This may take several minutes. Click Ok to continue creating Records or Cancel to cancel this operation.
Ok   Cancel

If you are doing a BULK CREATE of RESEARCH records, you will need to complete the SPONSOR/STUDY fields. If doing a BULK CREATE of ELECTRONIC records, you will need to complete the fields for either Removable Media or Server/Service.

Once the records have been created, you may want to use the UPDATE feature (located under the CREATE and UPDATE action item drop down menu) to go into each record and add information to the **DESCRIPTION OF RECORDS** field to include details specific to that record, such as file ranges (i.e. A-D; E-L; M-P; Q-Z), or any other information useful in identifying the records within each individual box. You may also individually add an ATTACHMENT (box list inventory) to each record by using the UPDATE feature.
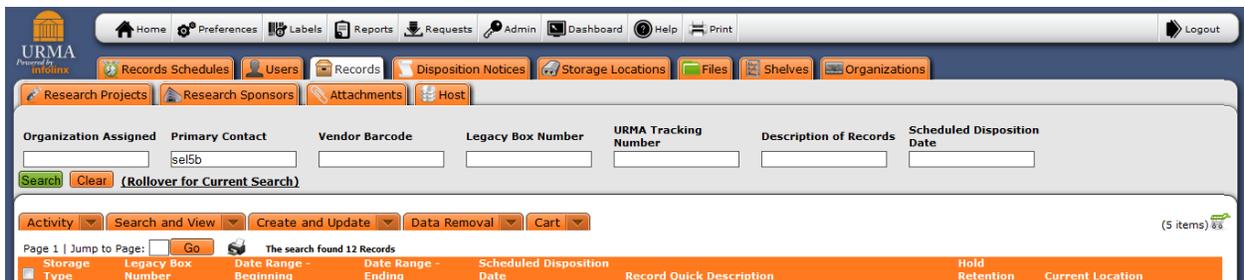
BULK UPDATE OF RECORDS

BULK UPDATE is useful if you need to update multiple boxes or DVDs of the same record series and/or the same research project. Again, you can use this function for PHYSICAL or ELECTRONIC storage, and STANDARD or RESEARCH records.

Select RECORDS from the Item Type tabs:
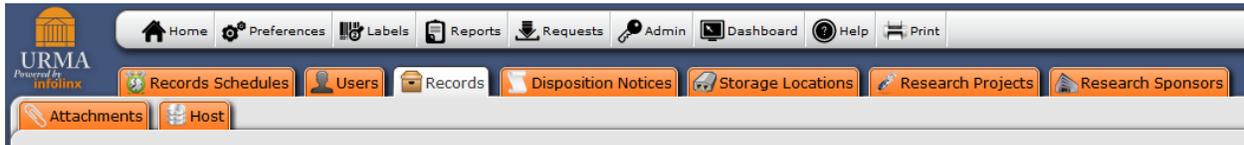
Next, execute a **QUERY** to identify the records you wish to update: Enter a value in any of the QUICK SEARCH AREA boxes. In the example below, the computing ID of the primary contact was entered. If searching other fields, remember to enclose your search criteria on either side with the % sign (this is the "wildcard" used in URMA).

The screen below displays the results of the search. Place a check mark to the left of each record you wish to include in the BULK UPDATE. Let's assume that we need to correct the beginning and ending date ranges for these records just created in the previous step.

Click on and select BULK UPDATE to display the screen below. You will notice a multitude of fields available to be updated. The fields displayed will depend on what type of storage and record type you are updating.

Scroll down to the field(s) you wish to update and enter the correct data. In this example, scroll to the Date Range-Beginning and Date Range-Ending fields and enter the correct dates as shown below.

Click the **Bulk Update** button in the upper right corner to begin the process.

The following screen will be displayed:

Click OK to continue. When the BULK UPDATE operation is complete you will be automatically returned to the Home Page Grid.