

# URMA

## University Records Management Application

Updated October 2015

# USING URMA

### Section VIII:

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**Bulk Update of Records . . . . . page 4**



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

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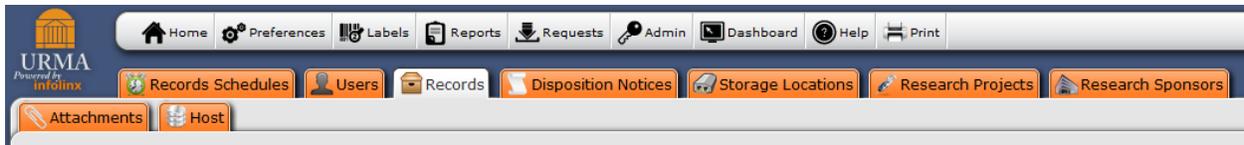
# BULK CREATE and BULK UPDATE OF RECORDS

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.

**Bulk Create new Records**

Number of items to create:  

Fields marked with an \* are required.

\*Storage Type:

\*Container:

Vendor Barcode:

Legacy Box Number:

\*Organization Assigned:

\*Physical Storage Type:

\*Record Type:

Records Series Assistance:

Records Series:

Record Series Number	Record Series Name	Records Series Description
Search Here: <input type="text"/>	<input type="text"/>	<input type="text"/>

**Current Search:** There is no current Records Series query. To search Records Series, enter you

Description of 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:

Fields marked with an \* are required.

\*Storage Type:

\*Container:

Vendor Barcode:

Legacy Box Number:

\*Organization Assigned:

\*Physical Storage Type:

\*Record Type:

Records Series Assistance:

Records Series:

Record Series Number	Record Series Name	Records : Descripti
Search Here: <input type="text" value="012082"/>		
<b>Current Search:</b> Find all Records Series where Record Series Number Starts W		
Page 1   Jump to Page: <input type="text"/> <input type="button" value="Go"/>		
Record Series Number	Record Series Name	Records Series Descriptio
<input checked="" type="radio"/> 012082	State and Local Funds Financial Records	All financial records involving receipts, purchase orders, sl

Description of Records:

Identifying Number:

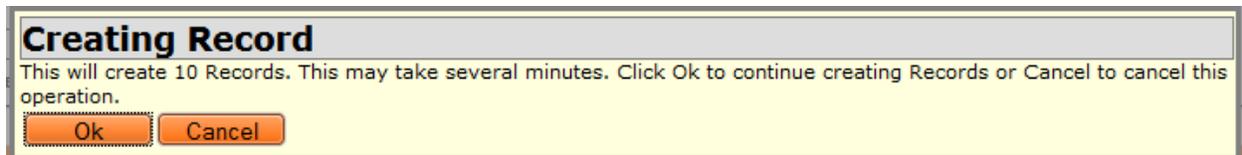
\*Date Range - Beginning:

\*Date Range - Ending:

Retention Trigger Date:

Disposition Date Assistance:

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



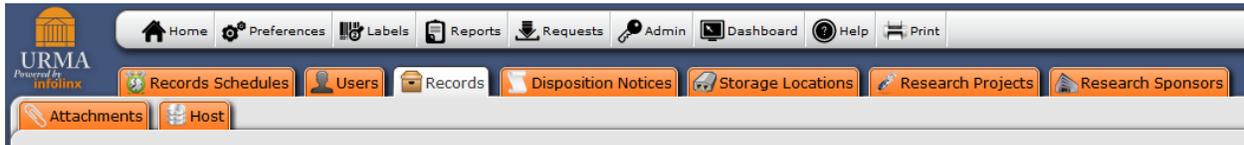
If you are doing a BULK CREATE of RESEARCH records, you will need to complete the SPONSOR/STUDY fields. If doing a BULK CREATE of ELECTRONIC records, you will need to complete the fields for either Removable Media or Server/Service.

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.

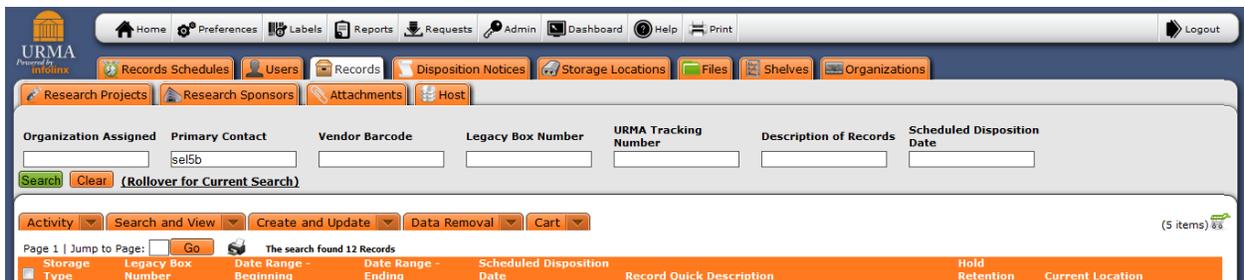
## BULK UPDATE OF RECORDS

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.

The screenshot shows the URMA web application interface. At the top, there is a navigation bar with icons for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print. Below this is a secondary navigation bar with tabs for Records Schedules, Users, Records, Disposition Notices, Storage Locations, Files, Shelves, and Organizations. A search bar is located below the navigation, with fields for Organization Assigned, Primary Contact (containing 'sel5b'), Vendor Barcode, Legacy Box Number, URMA Tracking Number, Description of Records, and Scheduled Disposition Date. A 'Search' button and a '(Rollover for Current Search)' link are present. Below the search bar are several dropdown menus: Activity, Search and View, Create and Update, Data Removal, and Cart. A status bar indicates '(5 items)'. The main content area shows a table with 12 records. The table has the following columns: Storage Type, Legacy Box Number, Date Range - Beginning, Date Range - Ending, Scheduled Disposition Date, Record Quick Description, Hold Retention, and Current Location. The records are all of type 'Physical' and have a 'Hold Retention' of 'False'. The 'Current Location' for all records is 'sel5b - Sue Breedon [22011]'. The table is titled 'The search found 12 Records'.

Storage Type	Legacy Box Number	Date Range - Beginning	Date Range - Ending	Scheduled Disposition Date	Record Quick Description	Hold Retention	Current Location
Physical		05/05/2009	05/05/2012	07/01/2015	0000012400: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012401: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012402: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012403: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012404: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012405: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012406: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]
Physical		05/05/2009	05/05/2012	07/01/2015	0000012407: State and Local Funds Financial Records [sel5b/22011]	False	sel5b - Sue Breedon [22011]

Click on **Create and Update** 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.

The screenshot shows the 'Bulk Update Records' screen in the URMA web application. At the top, there is a navigation bar with icons for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print. Below this is a secondary navigation bar with tabs for Records Schedules, Users, Records, Disposition Notices, Storage Locations, Files, Shelves, and Organizations. A search bar is located below the navigation, with fields for Organization Assigned, Primary Contact (containing 'sel5b'), Vendor Barcode, Legacy Box Number, URMA Tracking Number, Description of Records, and Scheduled Disposition Date. A 'Search' button and a '(Rollover for Current Search)' link are present. Below the search bar are several dropdown menus: Activity, Search and View, Create and Update, Data Removal, and Cart. A status bar indicates '(5 items)'. The main content area shows a form titled 'Bulk Update Records'. The form has a 'Bulk Update' button and a 'Cancel' button. Below the buttons is a warning message: 'Please keep in mind the following: Although Bulk Updates are recorded in history, they cannot be undone. Bulk updates to entire queries should not be performed when other users may be creating or editing records. Bulk Updates have the potential to consume significant resources. As a result, it is recommended large Bulk Updates be performed during off hours. You may be prevented from bulk updating some records due to security or due to deletion.' Below the warning message is a section for selecting the range of records to update, with three radio buttons: 'Update the 10 Records I selected on the previous page', 'Update the 12 Records matching my current query criteria', and 'Update the 12 Records matching my current query criteria'. Below this is a text field for 'Email: sel5b@virginia.edu abc@domain.com'. Below the email field are several dropdown menus: 'Storage Type', 'Container', 'Vendor Barcode', 'Legacy Box Number', 'Organization Assigned', and 'Electronic Storage Type'.

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.