

# 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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# MOVING TO STORAGE

Departments need to “store” both ELECTRONIC records, as well as PHYSICAL records. The University has contracts for vendor-provided off-site storage, used for both PHYSICAL records and ELECTRONIC records on removable media.

UVa's [Institutional Physical Records Storage Standards](#) defines three types of storage locations:

**In-Office Storage:** An office location in a University building where an employee has an active working area/desk that is used at minimum weekly.

**On-Site Storage:** A location within a University building where the department has active work areas and staff in the same location, but not in the same room. This may include closets, basements, file rooms or conference spaces. URMO will review on-site storage upon request.

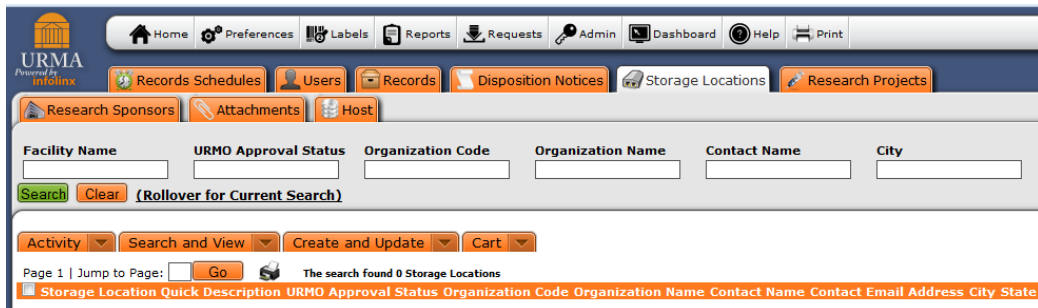
**Off-Site Storage:** An off-Grounds warehouse or vendor-provided storage service that has been reviewed and approved by the University Records Management Office and meets all requirements of the standards. For a complete list of approved storage vendors please visit the [Records Management website](#).

Once your boxes have been entered as records into URMA and you have printed labels for your storage boxes, the next step is to move the records to storage. Storage locations are not limited by ORG CODE so they can be viewed and/or used by all URMA users. Off-site storage vendor storage services managed by the Records Management Office are available in URMA for you to select when requesting a pickup for the storage of your records. If your **Storage Location** is not one of the University-managed storage vendors and is not in URMA, you will need to add it.

## Adding IN-OFFICE and ON-SITE Physical Storage Locations

Before adding In-Office or On-Site Storage in URMA, or an off-site storage vendor not managed by the Records Management Office, search to ensure that the storage location has not already been entered. Please note that there may be storage locations for other departments in the same building, but they are in different rooms – do not use another department’s storage location unless you actually share the same space with that department for records storage.

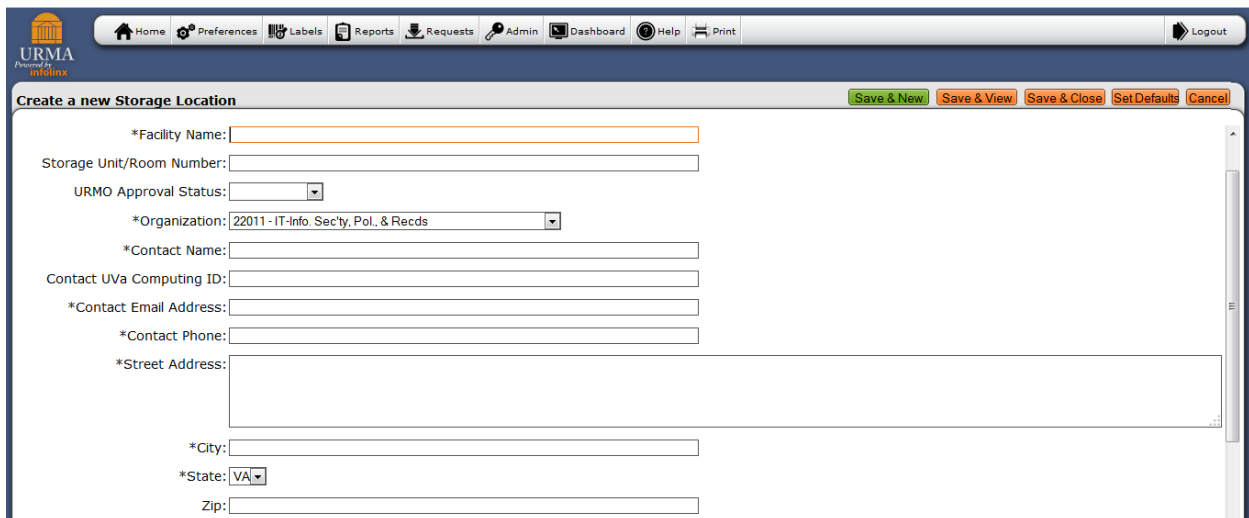
Select the **STORAGE LOCATIONS** item tab type:



The screenshot shows the URMA interface with the 'Storage Locations' tab selected. The search criteria include Facility Name, URMO Approval Status, Organization Code, Organization Name, Contact Name, and City. The search results show 0 Storage Locations. The 'Create and Update' button is highlighted.

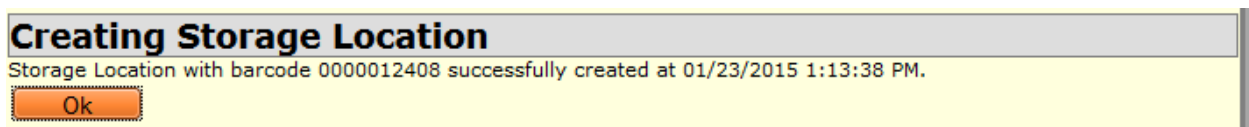
Click the down arrow on the CREATE and UPDATE action button

**Create and Update** and select CREATE. The screen below will be displayed. Be sure to fill in the information as completely as possible. (Ignore the INFOLINX System Fields at the bottom of the screen.)



The screenshot shows the 'Create a new Storage Location' form. The form fields include: \*Facility Name, Storage Unit/Room Number, URMO Approval Status, \*Organization (22011 - IT-Info. Sec'y, Pol., & Recds), \*Contact Name, Contact UVA Computing ID, \*Contact Email Address, \*Contact Phone, \*Street Address, \*City, \*State (VA), and Zip. The 'Save & New' button is highlighted.

A screen will be displayed confirming your action:



The screenshot shows a confirmation message: 'Creating Storage Location' and 'Storage Location with barcode 0000012408 successfully created at 01/23/2015 1:13:38 PM.' The 'Ok' button is highlighted.

## Records Management Office Approval of Physical Storage Locations

When you create a new storage location a message will be sent to the Records Management Office and your storage location will be marked as “pending.” The Records Management Office will review the storage location and contact you to confirm that the location meets the [Institutional Physical Records Storage Standards](#).

If your storage location meets the standards, the status of your location will be upgraded to “approved”. If your storage location does not meet the standards the location will be marked “not approved” and you will be advised to move the records to an approved storage location as soon as possible.

The [University Records Management Policy](#) requires that physical records be stored in compliance with the storage standards. If you have questions, please contact the Records Management Office ([urma-help@virginia.edu](mailto:urma-help@virginia.edu)).

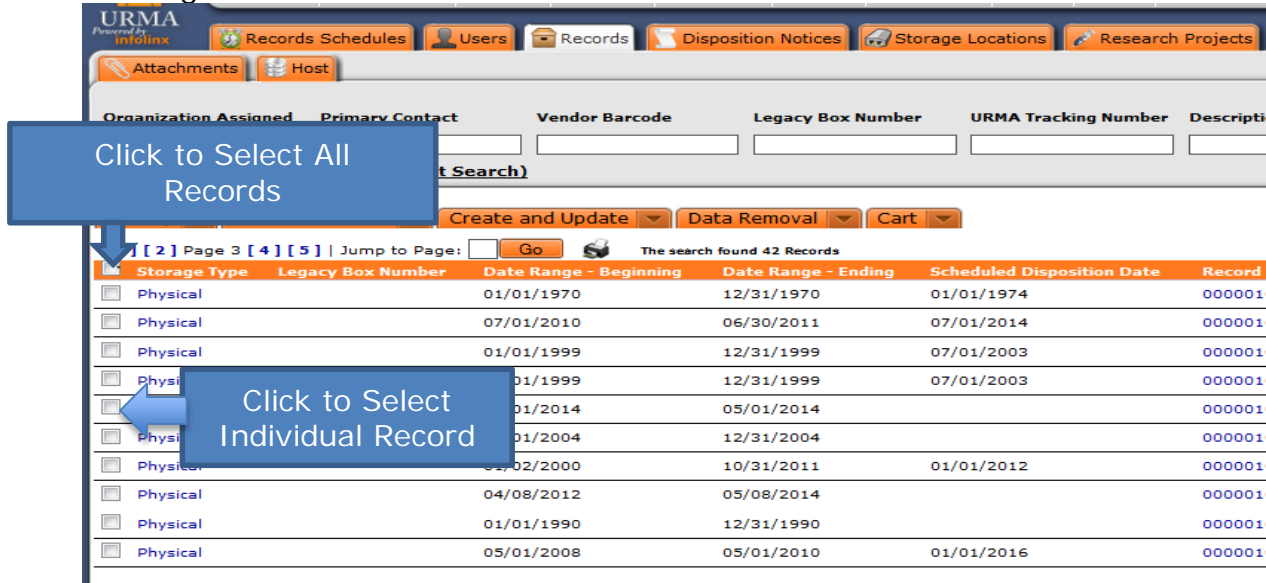
## Moving Records to Storage

Within URMA, if the records are being moved to **OFF-SITE STORAGE** (one of the University-managed storage vendors), you will **"REQUEST A PICKUP"**. If the records are being moved to in-office or on-site storage, you will **"TRANSFER"** those records. Both of these options are located under the "ACTIVITY" tab.



Begin by displaying your records from the Records Home Page Grid.

Select the records you wish to move to storage by either checking the box to the left of each record, or **SELECT ALL** by checking the box to the left of the column heading **STORAGE TYPE**.



The screenshot shows the URMA Records Home Page Grid. The interface includes a navigation bar with tabs for 'Records Schedules', 'Users', 'Records', 'Disposition Notices', 'Storage Locations', and 'Research Projects'. Below the navigation bar, there are search filters for 'Organization Assigned', 'Primary Contact', 'Vendor Barcode', 'Legacy Box Number', and 'URMA Tracking Number'. A search button is located below these filters. The main grid displays a list of records with columns for 'Storage Type', 'Legacy Box Number', 'Date Range - Beginning', 'Date Range - Ending', 'Scheduled Disposition Date', and 'Record'. Two blue callout boxes with arrows point to the 'Storage Type' column header and the first record's checkbox, indicating how to select records.

Storage Type	Legacy Box Number	Date Range - Beginning	Date Range - Ending	Scheduled Disposition Date	Record
<input type="checkbox"/> Physical		01/01/1970	12/31/1970	01/01/1974	000001
<input type="checkbox"/> Physical		07/01/2010	06/30/2011	07/01/2014	000001
<input type="checkbox"/> Physical		01/01/1999	12/31/1999	07/01/2003	000001
<input type="checkbox"/> Physical		01/01/1999	12/31/1999	07/01/2003	000001
<input type="checkbox"/> Physical		01/2014	05/01/2014		000001
<input type="checkbox"/> Physical		01/2004	12/31/2004		000001
<input type="checkbox"/> Physical		02/02/2000	10/31/2011	01/01/2012	000001
<input type="checkbox"/> Physical		04/08/2012	05/08/2014		000001
<input type="checkbox"/> Physical		01/01/1990	12/31/1990		000001
<input type="checkbox"/> Physical		05/01/2008	05/01/2010	01/01/2016	000001

## REQUEST A PICKUP: Moving Records to Records Management Office-Approved Storage Vendor

NOTE: Please visit [\[http://www.virginia.edu/recordsmanagement/storage/physicalstorage.html\]](http://www.virginia.edu/recordsmanagement/storage/physicalstorage.html) before requesting any pickup in order to review the vendor charges and create an account with the vendor.

If the records you have selected from the Home Page Grid are being moved to one of the approved storage vendors, you will **“REQUEST A PICKUP”** from the ACTIVITY tab. The screen below will be displayed.

Request Items to be picked up

Items to be picked up:  
Page 1 | Jump to Page:

Change Destination	Record Description	Current Location	Home Location	Destination
<input type="button" value="Apply"/>	0000012398: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012399: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012400: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012401: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012402: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		

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

Comments:

You will need to find the storage location you want to use in URMA. Click on SEARCH to display the screen below.

From this screen, you have the option to search on **Users, Storage Locations or Shelves**. (Shelves is a feature of URMA not yet implemented). For approved storage vendors, select the **Storage Locations** tab, enter the vendor's name in the Facility Name field using the % wild card on either end of your search term (e.g. %Patterson Pope% or %EDM%) and click Search to display the results.

Request Items to be picked up

Change Destination	Record Description	Current Location	Home Location	Destination
<input type="button" value="Apply"/>	0000012398: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012399: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012400: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012401: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012402: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		

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

Computing ID:   
 Role:   
 First Name:   
 Last Name:   
 Supervisor's Uva Computing ID:   
 Primary Organization:   
  (Rollover for Current Search)

Page 1 | Jump to Page:   The search found 0 Users

Computing ID	Role	First Name	Last Name	Primary Organization
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In the example below, the records are to be moved to long-term storage with approved storage vendor EDM Americas. The search criteria '%EDM%' was entered in the Facility Name field. After clicking the SEARCH button, the EDM vendor information was displayed. At this point, simply click on the radio button next to the facility name to select it.

Request Items to be picked up

Change Destination	Record Description	Current Location	Home Location	Destination
<input type="button" value="Apply"/>	0000012399: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012400: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012401: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		
<input type="button" value="Apply"/>	0000012402: State and Local Funds Financial Records [sel5b/22011]	sel5b - Sue Breeden [22011]		

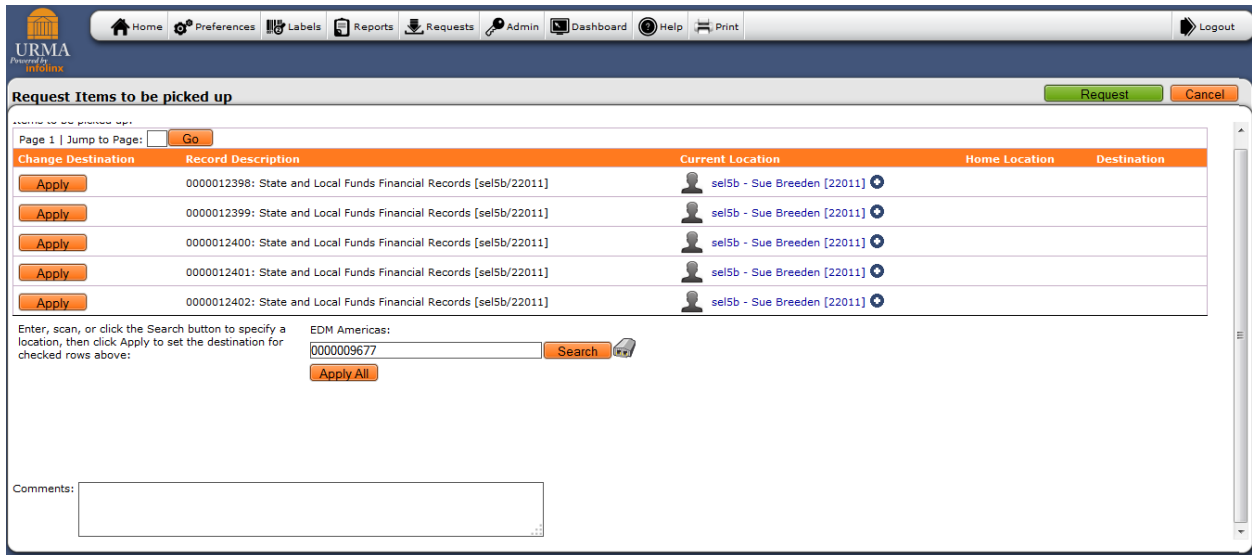
Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Facility Name:   
 URMO Approval Status:   
 Organization Code:   
 Organization Name:   
 Contact Name:   
 City:   
  (Rollover for Current Search)

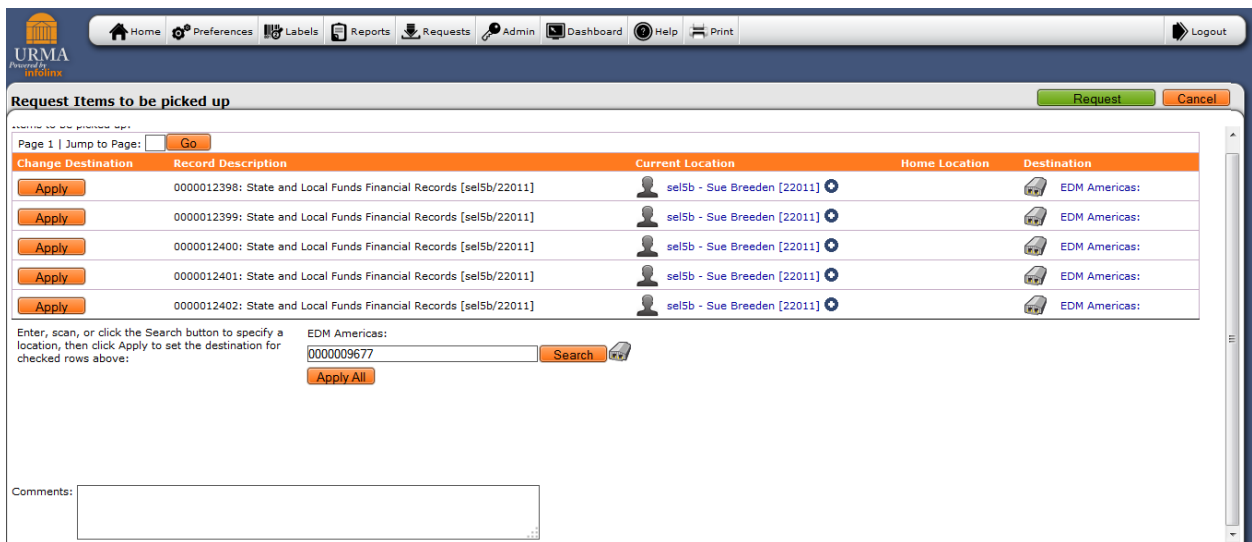
Page 1 | Jump to Page:   The search found 1 Storage Location

Storage Location Quick Description	URMO Approval Status	Organization Code	Organization Name	Contact Name	Contact Email Address	City	State
<input type="radio"/> EDM Americas:	Approved	22011	IT-Info, Sec'ty, Pol., & Recds	Univ Records Management Office	records@virginia.edu	Gordonsville	VA

You will be returned to a screen similar to the one below. You may enter **COMMENTS**. Notice that EDM, like every item in URMA, has a tracking number.

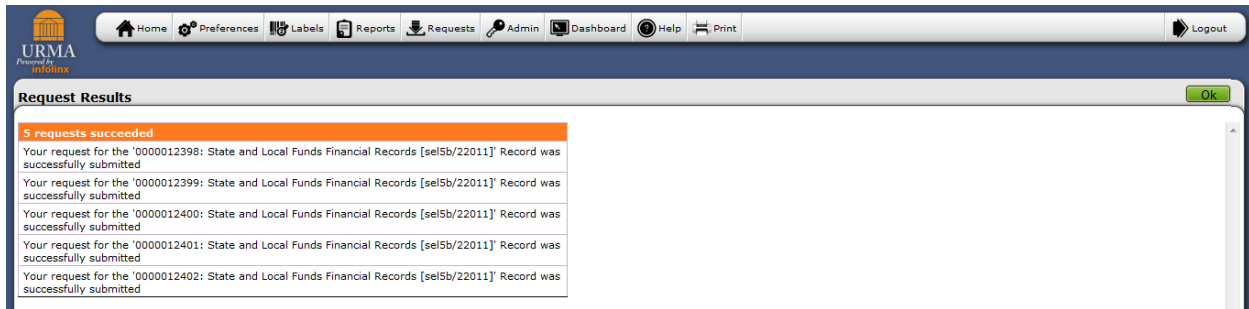


Click **APPLY** to change the destination to EDM or if there are multiple records you may use the **APPLY ALL** button to update all records on the screen. If you have multiple pages of records to move, you will need to **APPLY** the destination on each page. You may also enter any other relevant information in the **COMMENTS** box. Once you select **APPLY** the new destination will be displayed on the screen.



Click **REQUEST** to notify the Records Management Office that you have records to be picked up. A confirmation screen similar to the one below will be displayed.





The Records Management Office will contact you via email about obtaining labels from the vendor, scheduling a date for pickup, and further instructions. Once the records have been picked up, you do not need to do anything further in URMA with these records until they have met retention. At that time, you will receive an email explaining what needs to be done to either dispose of or archive these records.

## TRANSFER: Moving Records In-Office, On-Site or to Non-Approved Off-Site Storage

If the records you have selected on the Home Page Grid are being moved to IN-OFFICE, ON-SITE or to non-approved off-site storage you will select **“TRANSFER”** from the ACTIVITY tab. A screen similar to the one below will be displayed.

The screenshot shows the 'Transfer Items' interface. At the top, there is a navigation bar with icons for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print, along with a Logout button. Below the navigation bar, the 'Transfer Items' title is displayed with 'Transfer' and 'Cancel' buttons. The main area is titled 'Items to be transferred:' and includes a 'Change This List' link and a pagination control 'Page 1 | Jump to Page: [input] Go'. A table lists the records to be transferred:

Record Description
0000012403: State and Local Funds Financial Records [sel5b/22011]
0000012404: State and Local Funds Financial Records [sel5b/22011]
0000012405: State and Local Funds Financial Records [sel5b/22011]
0000012406: State and Local Funds Financial Records [sel5b/22011]
0000012407: State and Local Funds Financial Records [sel5b/22011]

Below the table, there is a section 'Items will be transferred to this location:' with a text input field and a 'Search ?' button. A checkbox labeled 'Make Home Location' is also present.

You will need to first locate the storage location you want to you. Click on **SEARCH** to display the screen below.

This screenshot shows the 'Transfer Items' screen after clicking the 'Search' button. The 'Items to be transferred:' table is the same as in the previous screenshot. Below it, the 'Items will be transferred to this location:' section now includes three tabs: 'Users', 'Storage Locations', and 'Shelves'. The 'Storage Locations' tab is selected. Below the tabs is a search form with fields for 'Facility Name', 'URMO Approval Status', 'Organization Code', 'Organization Name', 'Contact Name', and 'City'. There are 'Search' and 'Clear' buttons, and a note '(Rollover for Current Search)'. Below the search form is a table showing search results:

Storage Location Quick Description	URMO Approval Status	Organization Code	Organization Name	Contact Name	Contact Email Address	City	State
The search found 0 Storage Locations							

From this screen, you have the option to search on **Users, Storage Locations or Shelves**. (Shelves is a feature of URMA not yet implemented). Select the **Storage Locations** tab, enter the storage location name in the Facility Name field using the % wild card (e.g. %Patterson Pope% or %EDM%) and click Search to display the results.

In the example below, the records are to be moved to the **on-site office** of the Test Storage Location at 2400 Old Ivy Road. The search criteria '%Test%' was entered in the Facility Name field which returned the results below. At this point, click on the radio button next to the facility name to select it, check the box **“Make**

Home Location", and then click the **TRANSFER** button.

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Home Preferences Labels Reports Requests Admin Dashboard Help Print Logout

Transfer Items Transfer Cancel

0000012404: State and Local Funds Financial Records [sel5b/22011]  
0000012405: State and Local Funds Financial Records [sel5b/22011]  
0000012406: State and Local Funds Financial Records [sel5b/22011]  
0000012407: State and Local Funds Financial Records [sel5b/22011]

Items will be transferred to this location:  
Enter, scan, or click the Search button to specify the desired destination:  Search ?

Users Storage Locations Shelves

Facility Name URMO Approval Status Organization Code Organization Name Contact Name City  
%Test%        
Search Clear (Rollover for Current Search)

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

Storage Location Quick Description	URMO Approval Status	Organization Code	Organization Name	Contact Name	Contact Email Address	City	State
<input checked="" type="radio"/> Test Storage Location - SEB:		22011	IT-info. Sec'ty, Pol., & Recds	SE Breeden	sel5b@virginia.edu	Charlottesville	VA

Make Home Location

A confirmation of the transfer will be displayed on your screen:

**Message**  
5 transfers were successful  
Ok

Physically place these records in the storage location at this point. You do not need to do anything further with these records in URMA until they have met retention. Once retention is met, you will receive an email explaining what needs to be done to either dispose of or archive these records.