URMA
University Records Management Application
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USING URMA

Section X:
Moving to Storage

Adding In-Office and On-Site Physical Storage Locations . . . page 3

URMO Approval of Physical Storage Locations . . . . . . . . . page 4

Request a Pickup – Moving Records to a Records Management-Office
Approved Storage Vendor .......... . . . . . . . . . . . . . . . . . . . . . . . page 6

Transfer – Moving Records In-Office, On-Site or
to Non-Approved Off-Site Storage . . . . . . . . . . . . . . . . . . . . page 10

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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:

Click the down arrow on the CREATE and UPDATE action button 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.)

A screen will be displayed confirming your action:


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

NOTE: Please visit [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.

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.
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.

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.

You will need to first locate the storage location you want to you. 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). 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.

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

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.