ACTION ITEMS
Section on screen identifying various “actions” available in URMA. May be drop down boxes; click to execute specific actions on items matching the search criteria (such as create, update, transfer and labels).

ACTUAL DISPOSITION DATE
The date entered when the records are destroyed and is the date of actual destruction.

ARCHIVAL BOX
Acid-free corrugated box with separate lid with a 2-inch drop, measuring 10” x 12” x 15”.

ARCHIVAL DOCUMENTS
Primary source documents that have accumulated over the course of an event, an individual, or an organization’s lifetime, and are stored permanently. May have historical significance.

ATTACHMENTS
URMA offers the capability to include “attachment lists” to individual records which details specific information on what is included in this URMA record. Think of an attachment in URMA as a box inventory.
CONTAINER

May be a records box, microfilm box, map/drawing tube or archival box.
DATE RANGE (BEGINNING)
Start date for the records in the box - date range should be listed as MM/DD/YYYY. If you have MM/YYYY, use the first day of the month for the day.

DATE RANGE (ENDING)
The end date for the records in the box - date range should be listed as MM/DD/YYYY. If you have MM/YYYY, use the last day of the month for the day (ex. 30, 31).

DESCRIPTION OF RECORDS
A short description of the records which may include more information on the records housed in the box – including a file listing or other identifying information. Although not required, adding details to this box will help you more easily identify these records (limit of 500 characters).

DISPOSITION DATE ASSISTANCE
Defaults to NO; select YES if you need help with determining the disposition date and/or retention trigger date. The URMO office will contact to assist. Please allow 24-48 hours for return contact.

DISPOSITION OF RECORDS
The destruction or records that have met retention OR the transfer of archival documents to permanent storage locations.

DISPOSITION NOTICES
Emails sent to primary contact or records administrator identifying records meeting retention requirements and are awaiting approval before destruction.
HOME
The URMA Home Page – the start page for the application

HOME PAGE GRID
Section on screen that displays records matching any given search; click column headings to sort results in either ascending or descending order.

HOST
Shared server storage space on a network where electronic records are stored.
IDENTIFYING NUMBER
Ad hoc field used by department for a specific project number, account number or ID number associated with the records entered; can be left blank.

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. Storage must meet requirements as listed in the Physical Records Storage Standards [http://www.virginia.edu/recordsmanagement]

ITEM TYPE TABS
Section on screen that identifies the items being tracked in URMA; selecting the tab allows you to search, create, update, or other activities. May also be referred to as a DATA VIEW (Boxes, Records, Retention Schedules).
-L-

LEGACY BOX NUMBER

Department/unit box number on the box; could also be the box number from the legacy (original) URMA system located on a label of the box. Leave blank if you do not have one. Will be helpful in identification of the box.
-M-

**MAP/DRAWING TUBE**
Corrugated cardboard either triangular or rectangular, measuring up to 49” in length.

**MICROFILM BOX**
Corrugated cardboard box with attached lid, measuring 9” x 12” x 23”.
GLOSSARY

URMA Terms and Definitions

- O -

OFF-SITE STORAGE
An off-grounds warehouse or vendor provided storage service that has been reviewed and approved by the University Records Management Office (URMO) and meets all requirements of the standards. For a complete list of approved storage vendors please visit the URMO website [http://www.virginia.edu/recordsmanagement]

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. Storage must meet requirements as listed in the Physical Records Storage Standards [http://www.virginia.edu/recordsmanagement]

ORGANIZATION ASSIGNED
The five digit org number for your unit or unit for the boxes (usually the last five digits of a PTAO); will default to the Primary Org listed on user profile, but may be changed to any other ORG also identified on the user profile.

OSP AWARD NUMBER
This is the “A” in the PTAO associated with the project.
PHYSICAL STORAGE TYPE
The system defaults to Standard and you should not change this unless you have contacted the URMO at urma-help@virginia.edu and discussed the storage of archival records.

PI COMPUTING ID
ID of the Principal Investigator at the University of Virginia.

PRIMARY CONTACT (COMPUTING ID)
A Records Administrator or Records Coordinator who is the responsible custodian for the records and in the organization assigned to the records. The primary contact is the first level of approval for destruction of all records.

PRIMARY SPONSOR
The name of the company or organization who is the sponsor of the project. If a subcontract, the name of the organization contracting with UVA.

PROJECT NUMBER
The project number from the PTAO.
QUICK SEARCH AREA
Section on screen used to enter search criteria for an item type; ‘%’ is the wild card for any search within URMA. It is often helpful to search before entering an item, such as storage location, to ensure that the item has not already been entered.
-R-

RECORD SERIES
As mandated in the Code of Virginia, the Library of Virginia has developed records retention and disposition schedules outlining the disposition of public records. General schedules apply to the records of common functions performed by or for all localities and state agencies.

RECORD SERIES NUMBER
A six digit identification number in the Records Retention and Disposition Schedules located here: http://www.virginia.edu/recordsmanagement/schedules.html

RECORD TYPE
All records, either Physical or Electronics, must also be classified by RECORD TYPE. There are 3 record types to choose from: Standard, Research, and Facilities Management. Facilities Management is used only by a few staff in that department to enter the needed project numbers to track records

RECORDS (IN URMA)
The Item Tab used to enter individual boxes or electronic media/storage of University Records to be tracked for retention purposes. Records in the same box or electronic storage should all be managed under the same record series and retained for the same length of time.

RECORDS ADMINISTRATOR
Holds position of authority within the department such as department administrator, Director, or Supervisor. Has authority to remove records from the department either by destruction or transfer to another entity and is the second level approver in the URMA system to authorize the destruction of records. May also be a Primary Contact.

RECORDS BOX
Double-walled, corrugated cardboard box with a lid with at least a 2-inch drop, measuring 10” x 12” x 15”.

RECORDS COORDINATOR
Works frequently with departmental records and are main contacts for questions related to departmental records; maintains an inventory of departmental records, and reviews department records for destruction and/or transfer. May be a Primary Contact.

RECORDS SCHEDULES
The Records Retention and Disposition Schedules approved by the Library of Virginia for use by the University of Virginia.

REMOVABLE MEDIA
CDs, DVDs, USB sticks, Internal hard drive of laptop or desktop computer, external drive
RESEARCH GROUP ASSOCIATION
The UVA Internal review board required for the research project. If there is more than one IRB associated with the same study, select based upon the following priority list: (1) HSR; (2) SBS; (3) IACUC; (4) IBC; (5) Other.

RESEARCH GROUP NUMBER (IRB Number)
The number assigned to the research project by the UVa internal review board.

RESEARCH PROJECTS
Sponsored grants and contracts, administered by the Office of Sponsored Programs.

RESEARCH RECORDS
A record type selected when entering research records such (such as administrative, research data/working papers, research financial, clinical trial administrative and data records as managed by OSP) that have retentions related to the close of the project or release from the sponsor, such as clinical trials, federal grants, etc. Refer to the section on ENTERING PHYSICAL RESEARCH RECORDS for more details.

RETENTION LANGUAGE PER CONTRACT
The language from the contract or protocol with specific instructions for the retention of the records.

RETENTION TRIGGER DATE
The date the retention clock starts. If the selected Record Series has a defined retention, this field will automatically be populated. Other record series may require a Trigger Date to be entered, such as the end date of a contract/grant, the close of a project, or release that takes place long after the records are stored. This date may not be known until after records have been entered into URMA and stored.

ROLE
A classification of a user of the University Records Management Application that assigns responsibilities for the completion of the "Certificate of Records Destruction (RM3)" and to help departments formalize their records management processes. The roles in URMA are Records Administrator (RA) or Records Coordinator (RC).
GLOSSARY
URMA Terms and Definitions

-S-

SCHEDULED DISPOSITION DATE
Will be calculated according to the record series selected. Information cannot be entered into this field.

SERVER/SERVICE
A shared network drive.

SPONSOR AFFILIATION
A category for the sponsor, such as Federal, UVA/Internal, State, Industry etc. Note that Industry sponsors are mostly clinical trials or drugs or devices.

SPONSOR PROTOCOL NUMBER
Number/code assigned to a research project by the sponsor for their internal identification of the project.

SPONSOR/STUDY
The funding agency or organization for a research project (including clinical trials). You may have a primary and a secondary sponsor of a research project.

STANDARD RECORDS
A record type selected when entering most records in URMA (meeting notes, financial records, personnel files, grade sheets, registration forms, etc); records other than research records. Refer to section on ENTERING STANDARD PHYSICAL RECORDS for further explanation.

STORAGE LOCATIONS
In-office, on-site, and off-site locations where physical records are stored; may be contracted storage vendors managed by URMO. Locations will be reviewed and approved by URMO for compliance with the Physical Records Storage Standards [http://www.virginia.edu/recordsmanagement]

STORAGE SUPPLIES
An ITEM TYPE TAB used to order standard storage boxes online by charging department PTAO.

STORAGE TYPE
Records in URMA are either PHYSICAL or ELECTRONIC. PHYSICAL records are paper documents while ELECTRONIC records are digital such as electronic office documents, electronic mail (email), data in application databases, etc.

STUDY/TRIAL END DATE
The date listed in Oracle as the study end date or the date the study was closed by the sponsor.

STUDY/TRIAL NAME
The official name of the study with the sponsor, often found in the protocol.
-T-

- U -

-V-

**TOP LEVEL/NAVIGATION MENU**

Section on screen that provides access to the various indicated functions. These links are always available throughout the application and are used to quickly jump to a particular section of URMA.

**USERS**

Listing of all accounts in URMA filtered by associated ORGANIZATIONS.

**VENDOR BARCODE**

The number on the barcode labels placed on boxes being stored with URMO approved vendor-provided storage service.