URMA
University Records Management Application
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USING URMA:
Screen Layouts
Changing Passwords
Tips and Tricks
Entering Records
Printing Labels
Moving to Storage
The Disposition Process

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SCREEN LAYOUTS

Below is the HOME PAGE GRID screen in URMA. Although this screen is displaying a list of records, most of the screens in URMA are organized the same way.

Level of access to any particular function will vary depending on your ROLE.

Hover over the Infolinx tab at the top of your screen to see your computing ID, name, primary org code and role.

Notice that the screen is divided into sections:

- **Top Level/Navigation Menu** – 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.

- **Item Type Tabs** – These are the types of items URMA is tracking; 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).

- **Quick Search Area** – used to enter search criteria for an item type; ‘%’ is the
**wild card for any search within URMA. NOTE** that it is often helpful to search before entering an item, such as storage location, to ensure that the item has not already been entered.

**Action Items** – may be drop down boxes; click to execute specific actions on items matching the search criteria (such as create, update, transfer and labels).

**Home Page Grid** – displays records matching a given search; click column headings to sort results in either ascending or descending order.

**TOP LEVEL/NAVIGATION TABS**

**HOME:** Return to the URMA Home Page – the start page for the application

**PREFERENCES:** Refers to various settings or options that can be set for the application; are grouped into 2 categories (General and Item Types). Clicking a Preference will display 3 values: SCOPE, DESCRIPTION, and VALUE. Items that are gray cannot be updated by the user.

- **Scope** - the four scopes in URMA are:
  - **System** - applies to everyone in the entire system.
  - **User** - applies to a user regardless of where they may login.
  - **Role** - preference can be configured independently by role.
  - **Workstation** - applies only to a specific computer

- **Description** – brief description of setting or option
- **Value** - this is the value that is currently set for a preference. It is displayed in the text box or drop down next to the preference description. If no value has been set for this preference, the default value (which may be blank) is displayed.

**LABELS:** manage label queues (after you have requested labels through the activity action tab for specific records)

**REPORTS:** access to standard and custom reports available in URMA; reports can be displayed in either PDF or EXCEL format.

**REQUESTS:** Lists options to display either BOX or FILE requests. URMA will display all requests for which you have rights to view; reduce the list by using the quick search fields above the grid.

**ADMIN:** use to change your password in URMA. All other items can only be modified by URMA administrators.
**DASHBOARD:** brings up “My Home Page” screen; displays
- **ITEMS** - all items currently checked out to the logged in user,
- **REQUESTS** - all outstanding requested items
- **PREFERENCES** - preferences that can be customized
- **USERS** – all users within the ORGS to which you also have access

**HELP:** online Help for application. Please keep in mind that this feature is very general. UVa’s implementation has been modified to meet the needs of our regulations and policies and will likely not match the online help information.

**PRINT:** Print Screen function – prints current screen only. If there are multiple screens, use the PRINT GRID icon to print your entire found set.

**ITEM TYPE TABS**

These tabs identify all the different items that are tracked in URMA.

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

**USERS:** Listing of all accounts in URMA filtered by your associated ORGANIZATIONS.

**RECORDS:** Information regarding physical and electronic records filtered by your associated ORGANIZATIONS. Allows you to search for a specific set of records, edit your records, request pickup, transfer to a different location, print box labels, etc.

**DISPOSITION NOTICES:** Identifying records which have met requirements for retention, are not on legal hold, and are therefore eligible to be destroyed.

**STORAGE SUPPLIES:** Order standard storage boxes online by charging department PTAO.

**STORAGE LOCATIONS:** In-office, on-site, and off-site locations where physical records are stored; may be contracted storage vendors managed by URMO.

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

**RESEARCH SPONSORS:** Sponsors of grants and contracts, administered by the Office of Sponsored Programs.

**ATTACHMENTS:** Identifies the record and attachment (i.e. box list) that is associated with that record. Can also attach a document to a record through
“create” or “update”.

**HOST:** shared storage space (servers) on a network for electronic files.

## QUICK SEARCH AREA

Quick Search is the quickest and easiest way to search for items. There is a quick search area for each *item type* tracked in URMA. To access the quick search, first click on the item type you would like to search for in the Item Type Tabs.

An example of the quick search area for tracking RECORDS:

To use the quick search, enter a value for the field you would like to search by and hit the enter key or click the **Search** button.

**The wild card for searching fields in URMA is the %**. For example, to view all records that begin with **ORG 220**, enter `%220%` in the Organization Assigned field. **ALWAYS** begin and end your search criteria with the %, the wild card in URMA.

Be sure to click the **Clear** button before doing another search

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**Search for Any Item Type in URMA (Records, Storage Locations, Users, etc)**

1) Click the desired **Item Type Tab** – Records, Retention Schedules, Users, Storage Locations, etc.

2) Choose the field(s) in the Quick Search Area you wish to search.

3) Enter appropriate search criteria in any one or more of the search fields.

   **Remember that the wild card is the %**.

4) Click the **SEARCH** Button or press **<Enter>**.

5) Results will be displayed in the Home Page Grid and will be limited to those items within your ORGS. Exception: ALL Records Schedules will be listed, since they are not restricted to any particular ORGS. You will quickly learn how to define a search for those schedules used most frequently. Be sure to click the **Clear** Button to start a fresh search.

*Note:* If search returns no items, too many items, or incorrect items, modify the search criteria. Check spelling, simplify search, try fewer or different field(s). Click the **Clear** Button to start a fresh search.
CHANGING PASSWORDS

Passwords for URMA must:

- be 10 to 32 characters and
- contain at least a number and
- contain a non-alphanumeric character.

Your password will need to be changed annually.

Each user may change their password at any time but must be logged in to do this. If you have forgotten your password and are unable to log in, please email the University Records Office [urma-help@virginia.edu] to request a password reset.

**Your account will be locked after five unsuccessful login attempts.** At that point you will need to contact the Records Management Office to reset your password (send email to urma-help@virginia.edu).

To change your password, click the **Admin** button on the Navigation Menu to display this screen:

![Admin Screen](image)

Click the **Change Password link** and enter your current password, your new password, and then reenter your new password.
Be sure to click Save.

**BASIC FLOW OF DATA**

To get the most benefit from URMA and the University’s Record Management process, be sure to utilize the full functionality of the on-line system, as well as taking advantage of the contracts in place for off-site storage.

- Enter a record in URMA
- Print a label for the storage box (if a physical record; not needed for electronic records)
- “Move” the records you’ve entered to storage.
- When the records have met disposition requirements, follow the instructions for disposing or archiving these records.

Every item created in URMA (user, record, storage location, etc.) is automatically assigned an **URMA Tracking Number**. When you create records the URMA Tracking Number is also the **BOX number** in URMA. You may occasionally see the term BARCODE used interchangeably with Tracking Number.

**TIPS AND TRICKS**

When entering data fields identified with an asterisk * are required.

Entered values can be set as default values when creating new records by clicking the **Set Defaults** button. (Ex: if you enter mostly PHYSICAL records, you may want to set that as a default).

Location information is visible on the **View a Record** screen. Notice that the **CURRENT LOCATION** defaults to the user entering the record (meaning the records are with you). Whenever you “move” records to another location, either in-office, on-site, off-site or to an URMO-managed vendor site, be sure to mark the new site as the new “home” location. (EDM vs local??)

**Error Messages** appear at the top of the create screen. If the system will not accept your record, simply scroll to the top to see which field needs to be corrected.

There are times that additional (pop-up) windows need to be displayed in URMA. Check your browser settings to allow pop-up windows for the Infolinx application.

There are multiple ways to accomplish the same task in URMA. You will quickly discover which method works best for you.
ENTERING RECORDS

The next steps will be actually creating records in URMA. REMEMBER that records entered into URMA will be classified by STORAGE TYPE and then by RECORD TYPE.

STORAGE TYPE is either PHYSICAL or ELECTRONIC.

All records, either Physical or Electronics, must then be classified by RECORD TYPE: Standard, Research, and Facilities Management. The Facilities Management record type is only used by a small group for specialized purposes so this documentation only details the use of Standard and Research record types.

While a few users will need to enter both RECORD TYPES (Standard or Research), most URMA users will only be entering one or the other. A lot of the needed information is the same for both, but RESEARCH records requires additional information about the Sponsor and Study.

Once you learn how to enter PHYSICAL STANDARD or PHYSICAL RESEARCH records, it is very simply to transfer that knowledge to entering the ELECTRONIC versions of both record types.

ENTERING PHYSICAL STANDARD RECORDS

Select RECORDS on the Item Type tabs menu.

Click the down arrow on the Create and Update action button and select CREATE. This screen will be displayed:
COMPLETE THE FIELDS AS FOLLOWS:

**Storage Type** = Physical

**Container** = May be a records box, microfilm box, map/drawing tube or archival box. If the container is other than a standard Records Box, use the drop down box to select the correct option.

**Vendor Barcode** = The number on the barcode labels placed on boxes being stored with URMO approved vendor-provided storage service. This is typically left blank until boxes are “moved” to storage.

**Legacy Box Number** = Department/unit box number on the box; could also be the box number from the legacy URMA system located on a label of the box. Leave blank if you do not have one. Will be helpful in future identification of the box.

**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 listed on the user profile.

**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

**Record Type:** Select STANDARD

**Record Series Assistance:** If unsure which Record Series to use, change
Record Series Assistance to YES and provide a description of the records. An email will be sent to the UVa Records Management team who will respond within 2 business days to assist you.

Record Series: This area is used to identify the correct records series as identified in the Records Retention and Disposition Schedules. Enter search criteria in any of the fields to locate the correct record series. Be sure to begin and end your search criteria with the % wildcard. Simply click the radio button next to the correct record series and the record series number will be displayed above.

Attachment: a document (created outside the URMA system) which lists specific information on what is included in this URMA record; a box inventory. Attachments CANNOT contain any Personally Identifiable Information (PII), any information protected under HIPAA, or any other highly sensitive data. URMA will be scanned regularly to ensure that all attachments comply with this requirement.

- Allowable formats for attachments are Excel, Word, PDF, and TXT files.
- Only ONE attachment per record, however, the same attachment can be attached to multiple records
- Attachments cannot be added using Bulk Create
- Access is restricted by ORG (just as viewing a record, etc)
- Clicking on the attachment file name may open the document in a second window AND/OR download the attachment to your computer. The behavior is dependent on the browser and the version of the browser you are using.
- See XXXXXXXXXXX for more details about adding and deleting attachments

Description of Records: A short description (in your words) 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).

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.

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).

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.

**Disposition Date Assistance:** If you need assistance with Scheduled Disposition Date, change Disposition Date Assistance to YES. An email will be sent to the UVa Records Management team who will respond within 2 business days to assist you.

**Scheduled Disposition Date:** Will be calculated according to the record series selected. Information cannot be entered into this field.

**Primary Contact:** defaults to your computing ID. It may be changed to another person within the same ORGANIZATION by entering criteria in any of the search fields, then selecting the computing ID of the person to whom these records should be assigned. This person will be the responsible custodian for the records and is the first level of approval for destruction of all records.

You are now ready to save the record:

Clicking on **Save & New** will save the new record and remain on the Create Record screen to create a new record.

Clicking on **Save & Close** will save the new record and return you to the Home Page.

Clicking on **Save & View** will save the record and go to the View screen for that record. This is useful if your next step is to take an action on this record such as Print Label, Request a Pick-Up to URMO managed storage or Transfer to a storage location. It also gives you the opportunity to review the data entered, a good idea especially if you are a new URMA user.

**Should anything need to be changed, select** [Create and Update], [then UPDATE]. Make the necessary changes and be sure to save the record.

**ENTERING PHYSICAL RESEARCH RECORDS**

When creating Research Records, it is important to remember:
- A **record** must be assigned to a **project**
- A **project** must be assigned to a **sponsor**
- **One sponsor** may have **multiple projects**
- **Multiple organizations** may assign records to any **one project**

This means that **SPONSOR/STUDY** will be a **required** field. You will be able to SELECT it from a list, or ADD a new Research Project if the needed sponsor and study is not in URMA.
Select **RECORDS** on the Item Type tabs menu. Click the down arrow on the CREATE and UPDATE action button and select CREATE.

This screen will be displayed:

**COMPLETE THE FIELDS AS FOLLOWS:**

**Storage Type** = Physical

**Container** = May be a records box, microfilm box, map/drawing tube or archival box. If the container is other than a standard Records Box, use the drop down box to select the correct option.

**Vendor Barcode** = The number on the barcode labels placed on boxes being stored with URMO approved vendor-provided storage service. This is typically left blank until boxes are “moved” to storage.

**Legacy Box Number** = Department/unit box number on the box; could also be the box number from the legacy URMA system located on a label of the box. Leave blank if you do not have one. Will be helpful in future identification of the box.
**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 listed on the user profile.

**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.

**Record Type:** Use the drop down arrow to select RESEARCH. The screen will update to include additional fields at the bottom of the screen for SPONSOR/STUDY information.

**Record Series Assistance:** If unsure which Record Series to use, change to YES and provide a description of the records. An email will be sent to the UVA Records Management team who will respond within 2 business days to assist you.

**Record Series:** This area is used to identify the correct records series as identified in the Records Retention and Disposition Schedules. Enter search criteria in any of the fields to locate the correct record series. Be sure to begin and end your search criteria with the % wildcard. Simply click the radio button next to the correct record series and the record series number will be displayed above.

**Attachment:** a document (created outside the URMA system) which lists specific information on what is included in this URMA record; a box inventory. Attachments CANNOT contain any Personally Identifiable Information (PII), any information protected under HIPAA, or any other highly sensitive data. URMA will be scanned regularly to ensure that all attachments comply with this requirement.

- Allowable formats for attachments are **Excel, Word, PDF, and TXT files.**
- Only ONE attachment per record, however, the same attachment can be attached to multiple records
- Attachments cannot be added using Bulk Create
- Access is restricted by ORG (just as viewing a record, etc)
- Clicking on the attachment file name may open the document in a second window AND/OR download the attachment to your computer. The behavior is dependent on the browser and the version of the browser you are using.
- See XXXXXXXXXX for more details about adding and deleting attachments

**Description of Records:** A short description (in your words) 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).

**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.
**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).

**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.

**Disposition Date Assistance:** If you need assistance with Scheduled Disposition Date, change Disposition Date Assistance to YES An email will be sent to the UVa Records Management team who will respond within 2 business days to assist you.

**Scheduled Disposition Date:** Will be calculated according to the record series selected. information cannot be entered into this field.

**Primary Contact:** defaults to your computing ID. It may be changed to another person within the same ORGANIZATION by entering criteria in any of the search fields, then selecting the computing ID of the person to whom these records should be assigned. This person will be the responsible custodian for the records and is the first level of approval for destruction of all records.

**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. You should always search before entering a new sponsor or study. Search on any of the fields within the box. If you locate the correct sponsor and study, simply click the radio button on the left to select it.

If the needed sponsor and study is not in the system, you may add it from this screen by clicking the ADD button. This opens a 2nd window and allows you to enter a new Research Project.
**Research Group Association** - Please indicate the UVA Internal review board required for the study (if known) - Select from drop down list. 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)** – Enter the IRB or other review board number here. (If you do not know this number, enter 00s to match the format required).

**PRIMARY SPONSOR:** the name of the company or organization who is the sponsor of the project - if a subcontract, indicate the name of the organization contracting with UVA. (Examples: NIH, Komen Foundation, Kaiser-Permanente, etc).

**Primary Sponsor Protocol/Study Number** – sponsor’s protocol number

**PTAO Project Number:** - This is the “P” in the PTAO associated with the project.

**OSP Award Number** – This is the “A” in the PTAO associated with the project.

**Retention Language per Contract** – This is the language from the contract or protocol with specific instructions for the retention of the records.

**Study/Trial Name** - The official name of the study with the sponsor.

**PI Computing ID** - ID of the Principal Investigator
**PI First Name** – First name of the Principal Investigator

**PI Last Name** – Last name of the Principal Investigator

Within this screen, search for **PRIMARY SPONSOR** before adding a new one. If the correct SPONSOR is displayed, simply click the radio button to select it. If not found, click the **ADD** button and a 3rd window will open allowing you to ADD the PRIMARY SPONSOR information:

*Sponsor Company/Name* - the name of the company or organization who is the sponsor of the project - if a subcontract, indicate the name of the organization contracting with UVA. (Examples: NIH, Komen Foundation, Kaiser-Permanente, etc).

**Sponsor Affiliation** - Indicate a category for the sponsor, such as Federal, UVA/Internal, State, Industry etc. Please note that Industry sponsors are mostly clinical trials or drugs or devices. Select from the drop-down list.

Click **Save & Close** to complete the addition of a new Research Sponsor. A confirmation screen will be displayed:

Click OK to be returned to the CREATE A NEW RESEARCH PROJECT screen. Although not all required, complete those fields with as much detail as possible. Note that you also have the option to add a SECONDARY SPONSOR from this screen. Just follow the steps as outlined above.

Once completed, you will be returned to the CREATE A NEW RECORD screen. The RESEARCH SPONSOR/STUDY information will be updated with the information you just added.
BE SURE TO CLOSE/EXIT THESE EXTRA WINDOWS TO RETURN TO THE ‘CREATE A NEW RECORD’ SCREEN.

If the additional windows are not displaying correctly, check your browser settings to allow pop-up windows for the Infolinx application.

You are now ready to save the record:

Clicking on **Save & New** will save the new record and remain on the Create Record screen to create a new record.

Clicking on **Save & Close** will save the new record and return you to the Home Page.

Clicking on **Save & View** will save the record and go to the View screen for that record. This is useful if your next step is to take an action on this record such as Print Label, Request a Pick-Up to URMO managed storage or Transfer to a storage location. It also gives you the opportunity to review the data entered, a good idea especially if you are a new URMA user.

A confirmation screen will be displayed:

```
Creating Record
Record with barcode 0000012409 successfully created at 01/27/2015 11:47:42 AM.
Ok
```

Should anything need to be changed, select **Create and Update**, then **UPDATE**. Make the necessary changes and be sure to save the record.

**ENTERING ELECTRONIC STANDARD OR RESEARCH RECORDS**

Remember that there are 2 storage types available in URMA: Physical and Electronic. ELECTRONIC records are digital such as electronic office documents, electronic mail (email), data in application databases, etc.

If you are entering ELECTRONIC records, you will need to know if these records are stored on REMOVABLE MEDIA (CDs, DVDs, USB sticks, internal hard drive of laptop or desktop computer, external drive) or on a SERVER/SERVICE (a shared network drive).
If you need assistance determining any of the data needed to complete the entry, please contact your LSP or technical support person in your department.

**Electronic Records on Removable Media**

- Select **RECORDS** on the Item Type tabs menu.

- Click the down arrow on the CREATE and UPDATE action button and select CREATE.

- Select **ELECTRONIC** Storage Type from the drop down box

- The screen below will be displayed. Notice that the only difference at this point is the addition of the field **ELECTRONIC STORAGE TYPE**
• Using the drop down arrow, select Removable Media for the Electronic Storage Type

At this point, you will need to enter the SIZE (a number limited to 9 digits), UNITS (KB, MB, GB, TB), DATA CUSTODIAN ((where the removable media is actually stored).

Please note that the remaining fields are identical to those used for PHYSICAL STANDARD or PHYSICAL RESEARCH Records. Refer back to those instructions if you need assistance in completing this screen.

Electronic Records on Server/Service

• Select RECORDS on the Item Type tabs menu.

• Click the down arrow on the CREATE and UPDATE action button and select CREATE.
• Select ELECTRONIC Storage Type from the drop down box

• The screen below will be displayed. Notice that the only difference at this point is the addition of the field ELECTRONIC STORAGE TYPE

Using the drop down arrow, select Server/Service for the Electronic Storage Type.

At this point, you will need to enter the HOST (name of server where data resides). HOSTS are limited by ORG CODES so only HOSTS specific to your organization will be displayed. If no HOSTS are listed from which to choose, you will need to ADD the HOST. (See instructions below)

FILE/FOLDER PATH (the location on the host where the records are...
located; generally a directory and file name),
SIZE (a number limited to 9 digits)
UNITs (KB, MB, GB, TB)

To Add a Host from this screen, click on the ADD button next to the Host field. The Create a New Host screen will be displayed:

Be sure to fill in the information as completely as possible. The ADMINISTRATOR for the host is the LSP or IT professional who provides technical assistance with the server space.

Please note that the remaining fields are identical to those used for PHYSICAL STANDARD or PHYSICAL RESEARCH Records. Refer back to those instructions if you need assistance in completing this screen.

A new host may also be added by selecting HOST on the Item Type Tabs menu:

Click the down arrow on the CREATE and Update action button and select CREATE. The Create a Host screen will be displayed, as described above. Again, be sure to fill in the information as completely as possible.
**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:

![URMA Records Schedules Interface](image)

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 above.

![Bulk Create new Records](image)

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

![Creating Record]

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 will need to update the DESCRIPTION OF RECORDS for each record to add individual details, such as file ranges (i.e. A-D; E-L; M-P; Q-Z), or any other information useful in identifying the records within that box. You may also add an ATTACHMENT (box list inventory) to each record.

**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 ITEM TYPE TABS. In the example below, the computing ID of the primary contact was entered. If searching other Item Types, remember to enclose your search criteria with the % wildcard.

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 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.

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, where your changes will be reflected.
in the records display.

**PRINTING LABELS (not needed for ELECTRONIC records)**

BE SURE TO VERIFY THAT EACH LABEL MATCHES THE CONTENTS OF THE BOX BEFORE PLACING THE LABEL ON THE BOX. DO THIS BY REVIEWING THE RECORDS DESCRIPTION OF EACH BOX IN URMA AND CONFIRMING THE URMA TRACKING NUMBER MATCHES THE LABEL.

By checking the box to the left of each record, select either a single record or multiple records from the **Home Page Grid** (as shown below):

![Home Page Grid](image)

or from the **View A Record** screen (as shown below) by clicking on a single record:
In either case, click on the button, and select **LABELS** from the drop down box. A screen similar to the one shown below will be displayed. You have the option to either **PRINT** the label(s) immediately or you can **SEND TO QUEUE** for printing later.

Select the “Design you wish to print“:
- for **STANDARD** records, select **Standard Avery 5168 (4/page)**
- for **RESEARCH** records, select **Research Avery 5168 (4/page)**

While not needed, should you wish to print a label for removable media, you select **AVERY 5163 (10/page)**.

If you have a partially used label sheet, you can indicate which **STARTING POSITION** you would like to print (see screen below). If these are all the records that need labels, select **PRINT**. A pdf of the labels will appear and you can print from that screen. The labels print in **landscape** mode. **Be sure to change printer properties to print in landscape.**
To print labels at a later time, select the “Design you wish to print” for box label and press SEND TO QUEUE. When you are ready to print labels sent to queue, click on the Labels tab on the Navigation/Top menu and the Manage Label Queues screen below will be displayed.

Select the queue name for the labels you want to print:
- For STANDARD records, the queue will be **Standard Avery 5168 (4/page)**
- For RESEARCH records, the queue will be **Research Avery 5168 (4/page)**

A list of the records in the queue will be displayed. You can select to View All Labels, or just View Labels Inserted by you. If you have a partially used label sheet, you can indicate which STARTING POSITION you would like to print (See above for layout). (Do not change the Grid Records Per Page number.) You can PRINT ALL to print all labels in this queue, or you can select specific records to
print. You also have the option to remove labels from the queue. Once you have made your selection and PRINT, a pdf of the labels will be displayed and you can print from that screen:
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.

Once your records have been created in URMA and you have printed labels for your storage boxes, the next step is to “move” the records to storage. If your Storage Location is not one of the University managed storage vendors and is not in URMA, you will need to add it.

UVa’s Institutional Physical Records Storage Standards defines 3 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 (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]

Storage locations are not limited by ORG CODE so they can be viewed and/or used by all URMA users. 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.

Off-Site Storage vendor storage services managed by URMO are added by URMO and are available in URMA for you to select when requesting a pick-up for the storage of your records. NOTE: Please visit [http://www.virginia.edu/recordsmanagement/storage/physicalstorage.html] before requesting any pick-up to review the vendor charges and create an account with the vendor prior to moving records to an URMO managed vendor.
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 URMO, 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:
URMO Approval of Physical Storage Locations

When you create a new storage location a message will be sent to URMO and your storage location will be marked as “pending.” URMO will review the storage location and contact you to confirm that the location meets the Institutional Physical Records Storage Standards [http://www.virginia.edu/recordsmanagement/standards/storagestandards.html].

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.

The University Records Management Policy [https://policy.itc.virginia.edu/policy/policydisplay?id=IRM-017] requires that physical records be stored in compliance with the storage standards. If you have questions, please contact URMO (urma-help@virginia.edu)

Moving Records to Storage

You will either “REQUEST A PICKUP” (if the records are being moved to one of the University managed storage vendors) or “TRANSFER” (if the records are being moved to in-office or on-site storage). 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 URMO Managed Storage Vendor

If the records you have selected from the Home Page Grid are being moved to one of the URMO managed 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 URMO
managed storage vendors, select the **Storage Locations** tab, enter the vendor’s name in the Facility Name field using the % wild card and click search to display the results.

In the example below, the records are to be moved to long-term storage with URMO managed storage vendor EDM. 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 UVa Records Management Office (URMO) that you have records to be picked up. A confirmation screen similar to the one below will be displayed.
URMO will contact you via email about obtaining labels from the vendor (Vendor Barcode field), scheduling a date for pick-up and further instructions. Once the records have been picked up, you are finished 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 or archive these records.

**TRANSFER: Moving Records In-Office, On-Site or to Non-URMO Managed Storage**

If the records you have selected on the Home Page Grid are being moved to IN-OFFICE, ON-SITE or to Non-URMO Managed 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 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:
Place these records in the storage location at this point. You are finished with these records until they have met retention. Once retention is met, you will receive an email explaining what needs to be done to either dispose or archive these records.

THE DISPOSITION PROCESS

Disposition most commonly involves the destruction of records that have met retention. However, it also includes the transfer of archival documents to permanent storage locations, such as a special collections library. Once records have met the required retention, URMA will “manage” the approval process for the disposition by mirroring the workflow currently used for the paper Certificate of Records Destruction – RM3 form.

While step-by-steps instructions are below, here’s a brief summary of the process. The disposition of records must be “approved” first by the PRIMARY CONTACT (PC), then by the RECORDS ADMINISTRATOR (RA), and finally the UNIVERSITY RECORDS OFFICER (RO). All of this is done in URMA. Once approved:

If your records are stored with URMO-managed storage vendors, URMO will handle the destruction process and will update the actual destruction date in URMA for those records. Your work with these records is complete – you are finished!

If your records are stored on-site, in-office, with a non-URMO managed storage vendor, or are electronic, the PC is responsible for completing the destruction process and updating the “Actual Destruction Date” and “Method of Destruction” in URMA for the records.

The University Records Management Office must initiates the disposition process which will likely be done on a semi-annual basis. This means that you may have records that are eligible for disposition but you have not yet received a notice from URMA. However, you can request a disposition at any time by sending email to urma-help@virginia.edu.

APPROVING RECORDS FOR DISPOSITION

Primary Contact (PC) Approval

All PCs who have records that meet disposition requirements will receive an email notification similar to the one below. Note: each disposition will be assigned a batch number, so that number will change.

Subject: URMA: Records Have Met Retention - Batch 78

You are listed as the Primary Contact for records assigned to 22011 - IT-Info.
Sec'ty, Pol., & Recds that have met retention. Follow the link below to log into URMA, and then select “Query Records On Home Page”. Your records will be listed for review and disposition. If you find records within this group incorrectly included, or if you have any other questions contact the UVa Records Management Office.

<A link to the correct dataview in URMA will be included in this email>

Clicking the link in the email will take you to the VIEW DISPOSITION NOTICE screen similar to this:

If you act as both PC and RA for these records you will see separate links to query records for the PC and the RA roles beneath the list of records on this screen. The number of records eligible for disposition for each role is listed in parentheses:

To view the individual records that need PC APPROVAL, click on QUERY RECORDS THAT REQUIRE PC APPROVAL. You will be returned to the Home Page Grid where the records eligible for disposition will be displayed.
From this screen you have the opportunity to review each record to ensure that it is eligible for disposition. You can do this by hovering over each record or by clicking the Record Quick Description to see the record entry. Always go back to the Home Page Grid when you are ready to approve.

Select those records eligible to be destroyed by clicking on the box on the left of each record (as shown below). If you want to select all, click on the box next to the STORAGE TYPE column heading. If there are records which should not be destroyed, do not select them, and send an email to urma-help@virginia.edu to discuss the continued retention.

Once you have selected the records, from the same screen click and select BULK UPDATE. A screen similar to the one below will be displayed:
On this screen, you (as the PC) have the ability to “approve” the disposition of all the records you selected on the previous screen. Click the box next the PC Approval and add any appropriate notes. The record will be stamped by the system with your computing ID, time and date in order to provide verification that approval was given.

Before updating the records you must select a Records Administrator in your department to Notify from the drop down box (see screen below). If you need to select a different Records Administrator for different records, update only those records which a specific Records Administrator needs to approve, and then update the other records and select the alternate Records Administrator.

Click  to update all selected records.

A message similar to the one below will be displayed on your screen. Click OK to continue.
As PC you will receive an email indicating the bulk update is in process. If Primary Contact is your only ROLE in URMA, you now need to wait for RA and RO approval before continuing with the actual destruction process.

**Records Administrator (RA) Approval**

An email notification will now be sent to Records Administrator (RA) selected by the PC.

**Subject: URMA: Second Level Approval Requested – Batch 78**

You have been selected by sel5b - Sue Breeden [22011] as the Second Level Approver for records that have met retention and are assigned to 22011 - IT-Info. Sec’ty, Pol., & Recds. Follow the link below to log into URMA, and then select “Query Records On Home Page”. Your records will be listed for review and disposition. If you find records within this group incorrectly included, or if you have any other questions contact the UVa Records Management Office.

<a link to the correct dataview in URMA will be included>

Clicking the link in the email will take you to a VIEW DISPOSITION NOTICE screen similar to the partial screen below. If you act as a PC and RA for records you will see separate links to query records for the PC and the RA roles beneath the list of records on the VIEW DISPOSITION NOTICE screen. The number of records for each role awaiting approval is listed in parentheses.
Click on the link QUERY RECORDS THAT REQUIRE RA APPROVAL. From this screen you have the opportunity to review each record to ensure that it is eligible for disposition. You can do this by hovering over each record or by click the Record Quick Description to see the record entry. Always go back to the Home Page when you are ready to approve.

Select those records eligible to be destroyed by clicking on the box on the left of each record (as shown above). If you want to select all, click on the box next to the STORAGE TYPE column heading. If there are records which should not be destroyed, do not select them, and send an email to urma-help@virginia.edu to discuss the continued retention. As RA, you should also discuss this retention issue with the Primary Contact in your office.

Once you have selected the records which are ready for disposition, Select , and select either BULK UPDATE (for multiple records) or UPDATE (single records). A screen similar to the one below will be displayed:
If updating a single record you will see the PC approvals in the fields above the RA approval, whereas if you are doing a bulk update, these fields will be blank.

On this screen, you (as the RA) have the ability to “approve” the disposition of all the records you selected on the previous screen. Click the box next to the RA Approval and add any appropriate notes. The record will be stamped by the system with your computing ID, time and date in order to provide verification that approval was given.

Click to update all selected records. When the message below is displayed, click OK to continue.

As RA you will receive an email indicating the bulk update is in process. The University Records Officer (RO) will now receive notification that your records have been approved. The RO will then review and approve the records for the destruction. If the RO does not approve your records the PC will be contacted for a discussion.

**DESTROYING THE RECORDS**

The PC for the records will receive an email (similar to below) when the records have been approved by the RO for destruction. (Each individual PC will receive a notice when records can be destroyed, and you should only update destruction information on records for which you are the PC).

SUBJECT: URMA: Records Ready For Disposition: Batch 78
Records assigned to you have been approved and are ready for final disposition. If you store your records with a vendor managed by the Univ. Records Management Office, you are finished. The vendor will destroy your records and the Records Management Office will add the actual destruction date to your set of records in URMA.

If you store your records On-Site, In-Office or with an approved Off-Site vendor, your next steps are to 1) destroy, or request destruction by the vendor, of the approved records in accordance with University policy, and 2) enter the actual destruction date and method in URMA once complete.

If you have records that have permanent retention and will be transferred to an archival repository, the Records Management Office will be contacting you to discuss your next steps.

If you have any questions, contact the Univ. Records Management Office.

As the email indicates, if your records are stored with URMO-managed storage vendors, **URMO will handle the destruction process and will update the actual destruction date for those records.** Your work with these records is complete – **you are finished!**

If your records are stored on-site, in-office, with a non-URMO managed storage vendor, or are electronic stored on a Server/Service (HOST), the PC is responsible for **completing the destruction process and updating the “Actual Destruction Date” and “Method of Destruction”** for the records.

**QUERY** to locate the records that have received all 3 levels of approval (PC, RA, and RO) and see/print a list of the records approved for destruction, you need to:

From the Home Page Grid, select the RECORDS Item Type tab:

Click on SEARCH and VIEW and select SEARCH from the drop down list:

![URMA Interface](image)

You are searching all records that have a specific storage type, your organization code, primary contact and have all 3 levels of approval for destruction. Enter the following search criteria.

- If you have both electronic and physical records, select the appropriate **STORAGE TYPE**, otherwise leave blank.
Using the drop down arrow, select the correct **ORGANIZATION CODE** assigned to these records.

Scroll further down the screen and enter the PC’s **COMPUTING ID** in the field as indicated below:

Continue to scroll down to the Levels of Approval section. Select the **RO APPROVAL** box:

Click on the **EXECUTE** button at the **top right side of the screen**.
All records that meet the criteria entered will be displayed on the Home Page Grid, as shown below. Be sure to note if you may have multiple pages.

Best Practices suggests verifying that the boxes you are about to destroy or have destroyed are the correct ones. You can print a hardcopy of this “screen” to use as a checklist to locate the boxes that have been approved for destruction. Simply click the PRINTER GRID icon to print a hardcopy of your report. Using this icon will print ALL the pages.

If you have both electronic and physical records, simply search the records again, selecting the appropriate STORAGE TYPE and printing the new “screen”.

Once you have verified you have the correct records, please destroy these records.

**UPDATING “Actual Destruction Date” and “Method of Destruction”**

Remember: if your records are stored with URMO-managed storage vendors, **URMO will handle the destruction process and will update the actual destruction date for those records.** Your work with these records is complete – you are finished!
However, if your records are stored on-site, in-office, with a non-URMO managed storage vendor, or are electronic stored on a Server/Service (HOST), the PC is responsible for completing the destruction process and updating the “Actual Destruction Date” and “Method of Destruction” for the records.

After the records/boxes have been destroyed, the ACTUAL DESTRUCTION DATE and METHOD OF DESTRUCTION fields in URMA must be updated. Follow the QUERY instructions above to display the same group of records in URMA. A screen similar to the one below will be displayed.

Records with the same **storage type, disposition date, and destruction method** can be updated via BULK UPDATE. If **storage type, disposition date, and destruction method** are not the same then the records must be updated individually.

Select the records that have been destroyed.

Click the down arrow on the **Create and Update** action item, and select **Update/Bulk Update**. A screen similar to the one below will be displayed.
Select the range of records you would like to update, noting that there are 2 choices available. The default is “Update the X records I selected on the previous page”. Check to ensure that the number is the same as the number of records you selected on the previous page.

Enter the Actual Disposition Date
Select the Method of Destruction from the drop down list
Do NOT modify any other fields on this screen.
Click **Bulk Update**

A message similar to the one below will be displayed on your screen.

```
Message
This will update 3 Records with the values you have specified.
Click OK to continue with this Bulk Update or Cancel to cancel this operation.

Ok  Cancel
```

Click OK to continue. As PC you will receive an email that the bulk update is complete.

After disposition date and destruction method have been entered, URMA views these records as deleted and, depending on your role, you may not be able to view them. If you need information on any of these records, contact URMA (urma-help@virginia.edu).