

Guidance for using the Online Paper Records Management Database

The software can be used to undertake the following tasks:--

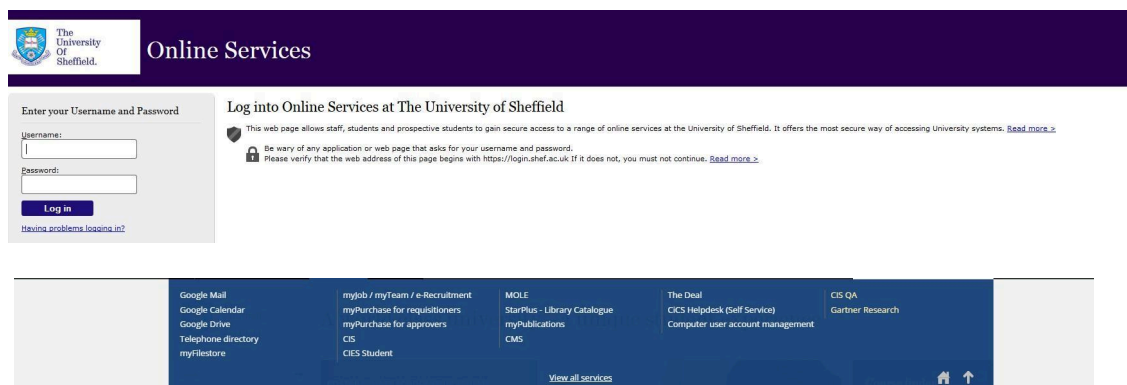
1. Sending information about the boxes to be transferred to the Records Centre.
2. Retrieving boxes or files from the Record Centre.
3. Viewing all of the boxes that you have stored or that have been disposed of within the Records Centre.

Logging in to the database

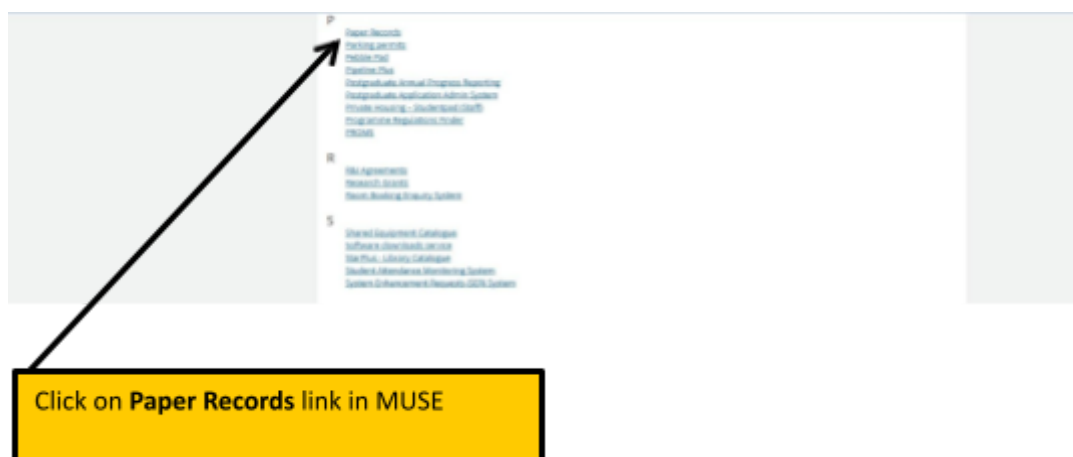
You need to be assigned and logged in to the database by the Records Management Service in order to use it.

To log in for the first time you will need to be assigned to a department. You can use any popular browser – Firefox, Chrome, IE, Safari. The URL is <https://paper--records.shef.ac.uk>

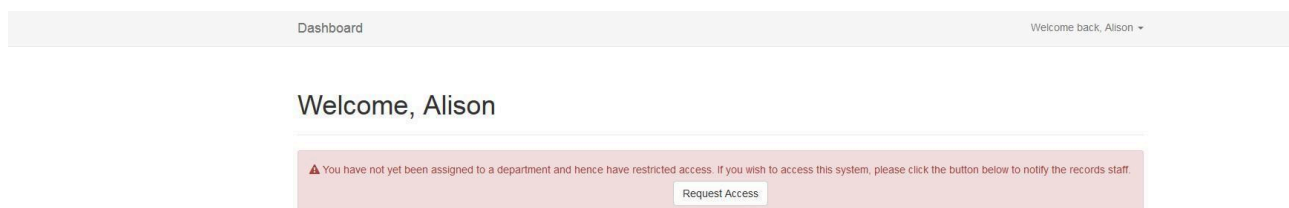
Log in to MUSE using your Username and Password



Under 'View all services' click on 'Paper Records'



When you have done this you will receive the following notification that asks you to Request Access. You need to do this in order to inform the Records Management Service.



When you have requested access the Records Management Service can assign you to your department.

Dashboard

Welcome back, Alison

Welcome, Alison

Thank you for requesting access. The records management staff have been notified and will be in touch shortly.

When you have been assigned a department you will be sent an email

Mail

1-30 of 30

COMPOSE

☆ Anne E Cutler

Fwd: Your account has been assigned to a department - Forwarded message From: Paper Records <no-reply@sheffield.ac.uk> Date: 19

13:14

COMPOSE

Inbox

Starred

Sent Mail

Drafts (6)

Bin

Circles

[Gmail]/Archives (...

[Gmail]/FOI

[Gmail]/Personal

[Gmail]/RM

Records centre

records manage...

research data

Student efile

Fwd: Your account has been assigned to a department

Inbox x

13:14 (1 hour ago)

to me

Forwarded message -----
From: Paper Records <no-reply@sheffield.ac.uk>
Date: 19 May 2015 at 13:07
Subject: Your account has been assigned to a department
To: a.cutler@sheffield.ac.uk

Online Paper Records Management

Hello Anne Cutler,

A manager has assigned you to the Corporate Information & Computing/Data Protection department. You can now submit new transfer forms, view currently stored boxes and manage retrievals for your department.

To access the system, please use the following link and log in with your CICS details.

<http://paper-records.shef.ac.uk/>

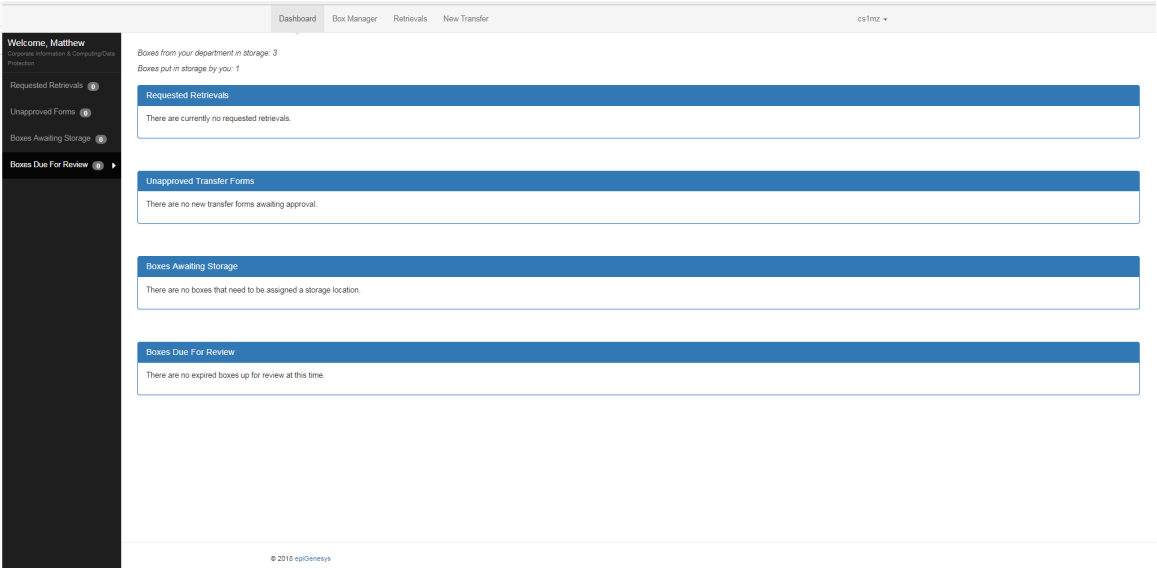
Thank you

Note: This is an automated message from the Online Paper Records Management System. Please do not reply to this email address.

If you click the URL in the email you will then be taken to the Dashboard for the database.


Dashboard

When you have signed in to the database using your username and password you will be on your departmental landing page, showing you your Dashboard. The Dashboard allows you to view any activity or holdings relating to your boxes. It also allows you to undertake actions.



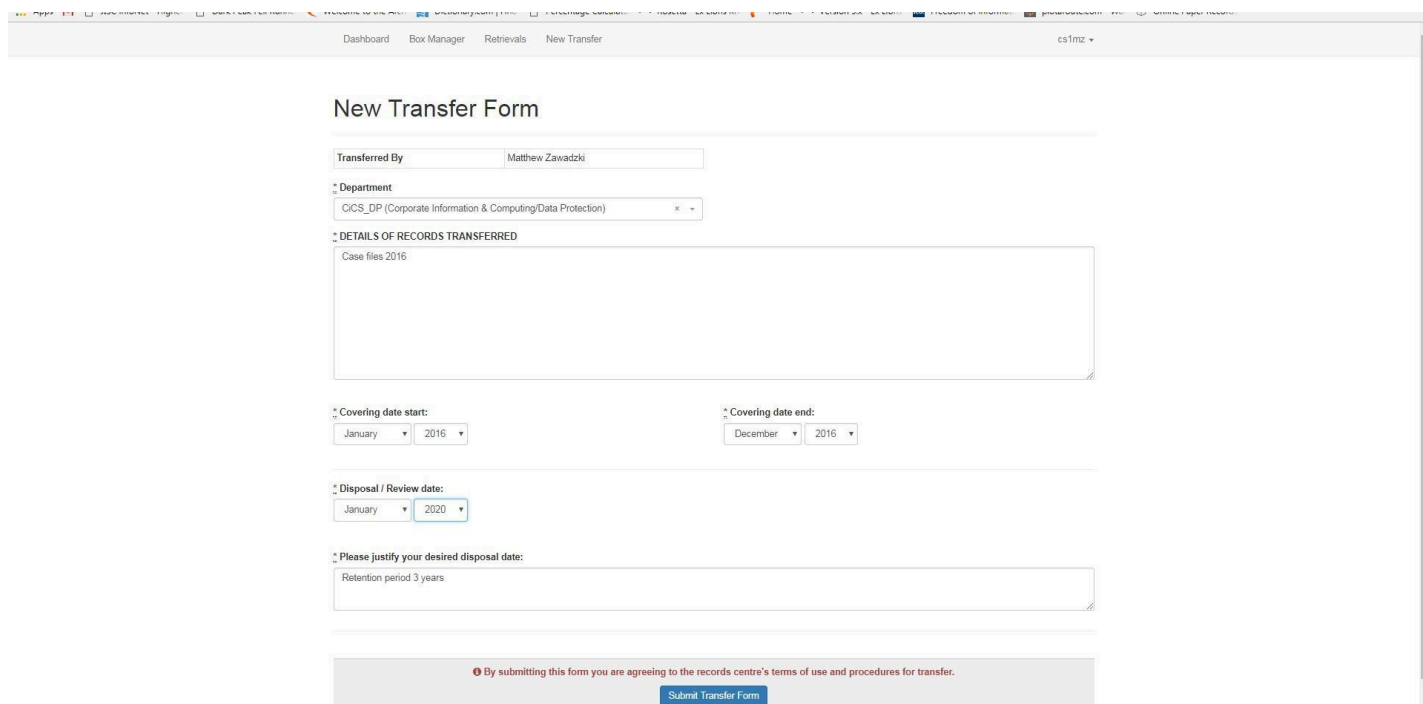
The Dashboard is your view of your boxes. It allows you to undertake new transfers, request retrievals and view the status of your boxes

Transfer data about new boxes



The screenshot shows the Records Management dashboard. The 'New Transfer' button is highlighted with a yellow box, and an arrow points to it. The dashboard includes a sidebar with 'Welcome, Matthew' and a main area with 'Requested Retirements' and 'Unapproved Transfer Forms' sections.

Enter the data on to the Transfer Form. When you have completed the data entry click on 'Submit Transfer Form' to send it to the Records Management Service. Please note once you have submitted the transfer form you cannot edit the data, so please ensure accuracy. You can now continue to complete another Transfer Form, navigate to another function on the dashboard or close down the browser. Note that some of the data remains in place, which enables faster data entry for boxes of material of a similar type / date. **Note:** All fields must be completed

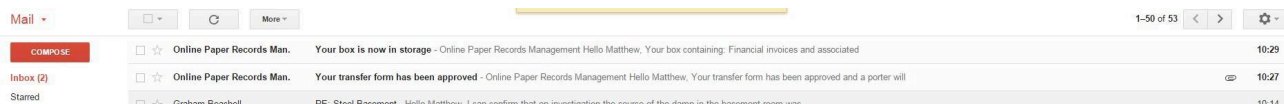


The 'New Transfer Form' page includes the following fields:

- Transferred By: Matthew Zawadzki
- Department: CICS_DP (Corporate Information & Computing/Data Protection)
- DETAILS OF RECORDS TRANSFERRED: Case files 2016
- Covering date start: January 2016
- Covering date end: December 2016
- Disposal / Review date: January 2020
- Please justify your desired disposal date: Retention period 3 years
- Submit Transfer Form button

By submitting this form you are agreeing to the records centre's terms of use and procedures for transfer.

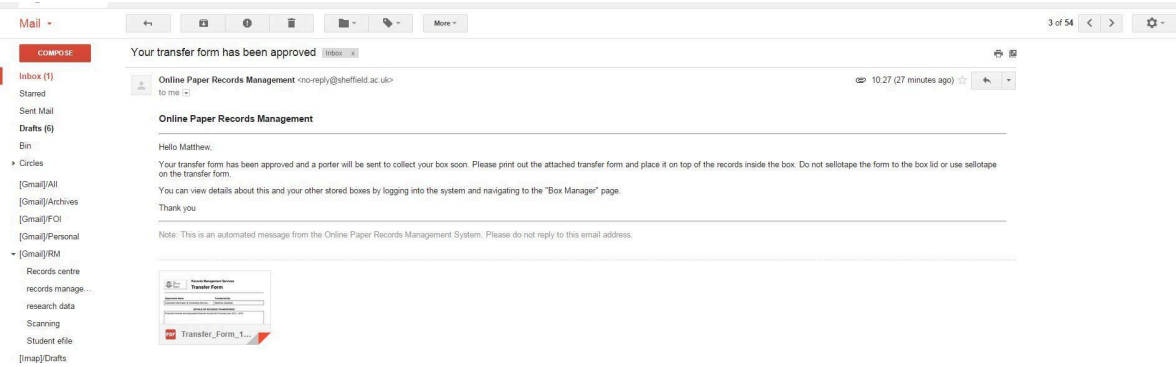
When you have submitted your Transfer Form to the Records Centre you will receive two emails.



The email inbox shows two emails from 'Online Paper Records Man.':

- Subject: Your box is now in storage - Online Paper Records Management Hello Matthew, Your box containing: Financial invoices and associated
- Subject: Your transfer form has been approved - Online Paper Records Management Hello Matthew, Your transfer form has been approved and a porter will

The first email will return to you a PDF of your Transfer Form that you will need to print out and place in the box to which it relates.





Records Management Services

Transfer Form

Department Name	Transferred By
Corporate Information & Computing Service...	Matthew Zawadzki

DETAILS OF RECORDS TRANSFERRED

Financial invoices and associated financial records for Financial year 2013 - 2014

Covering date start	Covering date end
August 2013	July 2014

Desired disposal date

August 2020

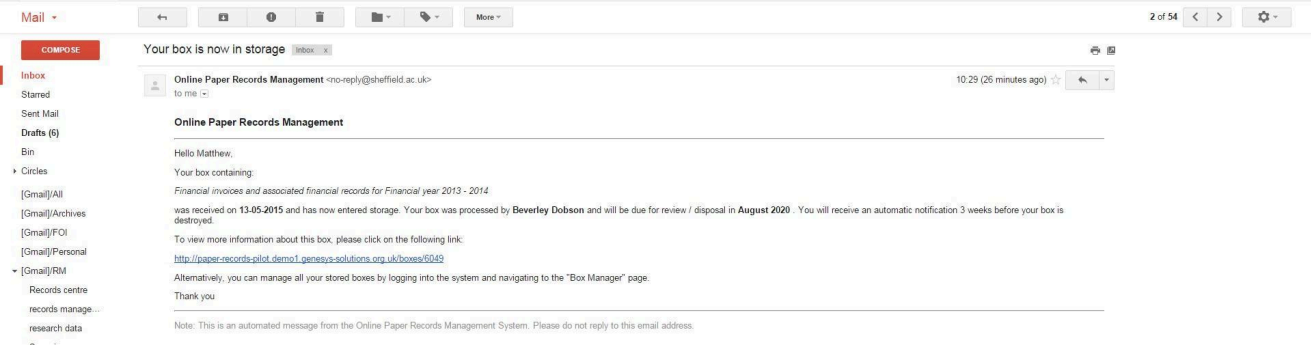
Justification for disposal date

Current Financial Year + 6 years

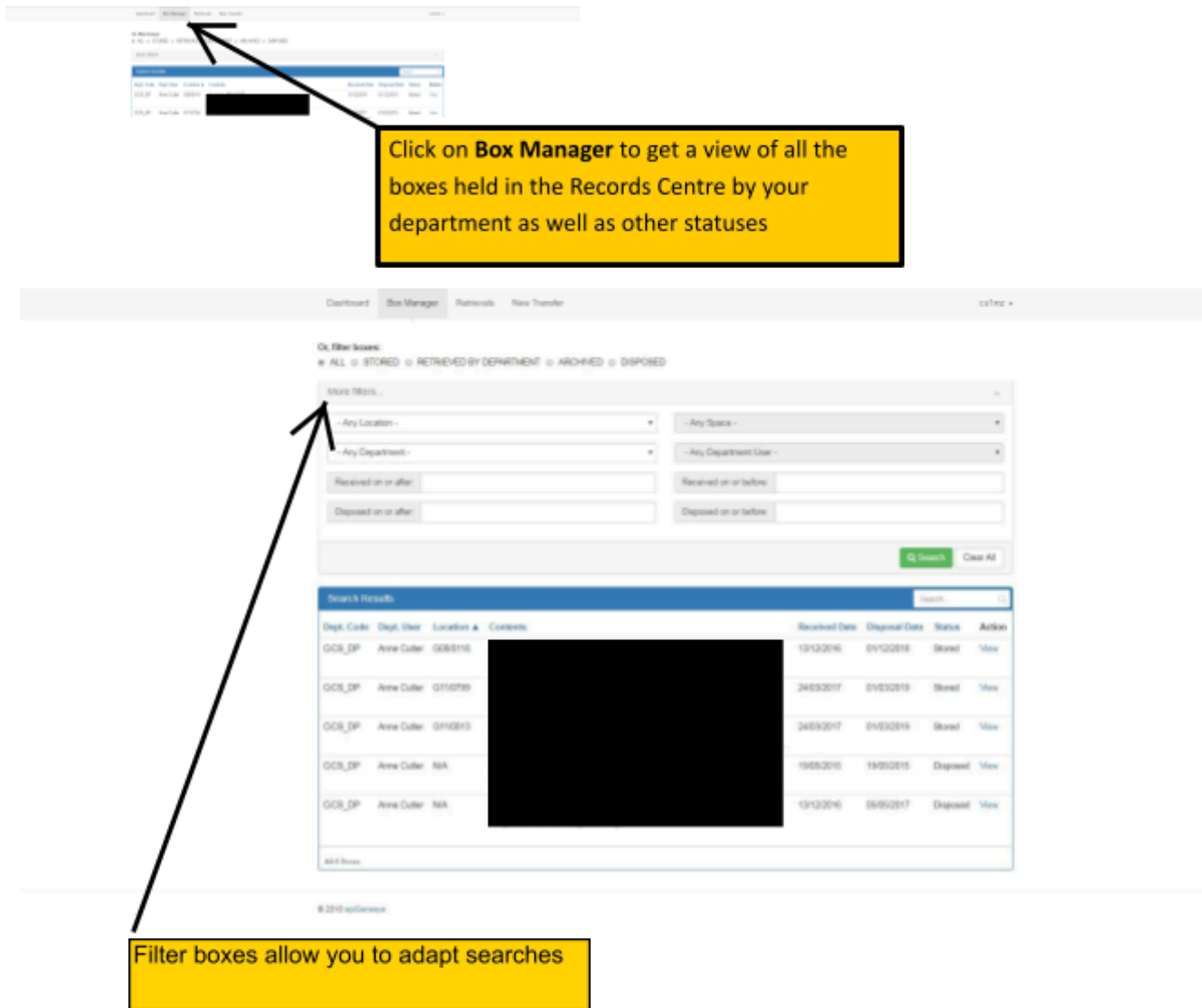
00000006049



The second email will be sent once the box has been collected and assigned a space in the Records Centre and will let you know how long it is being retained for and when you will receive a notification regarding its disposal.



Box Manager



The screenshot shows the Box Manager interface. At the top, there is a navigation bar with 'Dashboard', 'Box Manager', 'Retrievals', and 'New Transfer'. Below this, there is a 'Filter boxes' section with tabs for 'ALL', 'STORED', 'RETRIEVED BY DEPARTMENT', 'ARCHIVED', and 'DISPOSED'. The 'STORED' tab is selected. Below the tabs, there are several filter fields: 'Any Location', 'Any Space', 'Any Department', and 'Any Department User'. There are also date pickers for 'Received on or after', 'Received on or before', 'Disposed on or after', and 'Disposed on or before'. A 'Search' button and a 'Clear All' button are at the bottom of the filter section. Below the filter section, there is a table titled 'Search Results' with columns: 'Dept. Code', 'Dept. User', 'Location', 'Contents', 'Received Date', 'Disposal Date', 'Status', and 'Action'. The table contains five rows of data. A yellow callout box with an arrow points to the 'Filter boxes' section, containing the text: 'Filter boxes allow you to adapt searches'.

Click on **Box Manager** to get a view of all the boxes held in the Records Centre by your department as well as other statuses

Filter boxes allow you to adapt searches

Dept. Code	Dept. User	Location	Contents	Received Date	Disposal Date	Status	Action
GCS_DP	Anna Cullen	G080110	[REDACTED]	13/12/2016	01/12/2018	Stored	View
GCS_DP	Anna Cullen	G110759	[REDACTED]	24/09/2017	01/03/2019	Stored	View
GCS_DP	Anna Cullen	G110813	[REDACTED]	24/09/2017	01/03/2019	Stored	View
GCS_DP	Anna Cullen	N/A	[REDACTED]	19/05/2015	19/05/2015	Disposed	View
GCS_DP	Anna Cullen	N/A	[REDACTED]	13/12/2016	06/05/2017	Disposed	View

An 'open search' will allow you to return all boxes held by your department that have been assigned a storage space, and by using other fields you can narrow searches to find boxes that cover particular dates. There is also the facility to undertake specific free text searching for information about the boxes by using the 'search' box.

Retrieval Manager



Clicking on **Retrievals** will open the Retrieval Manager and allow you to send a request for a box or a file. Click on **New Retrieval Request** to start a request for a box or file

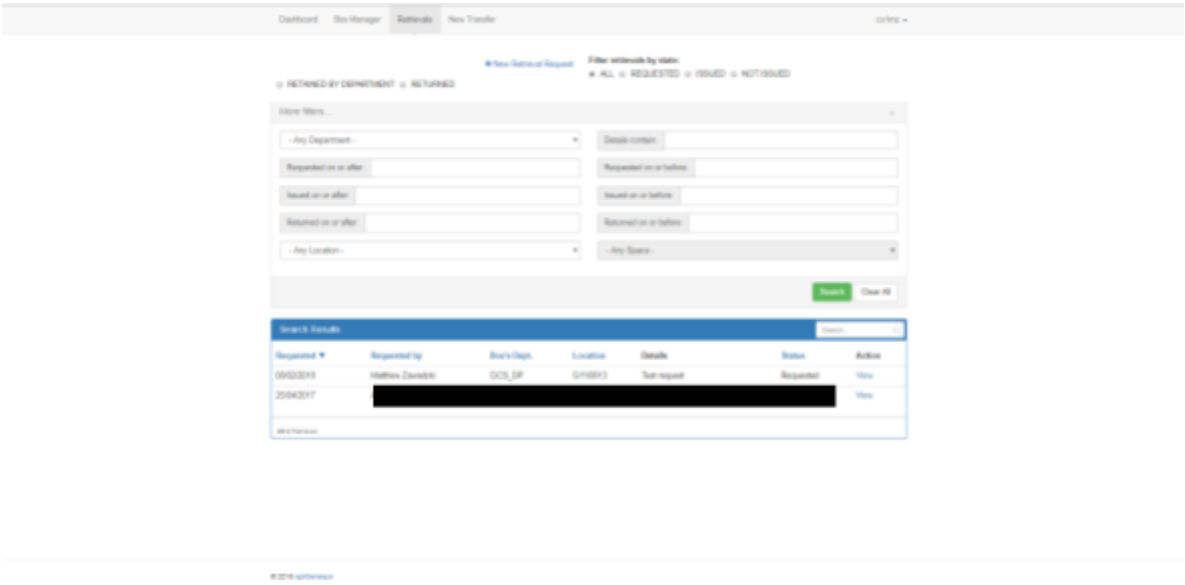
The screenshot shows the 'New Retrieval Request' form. It has a 'Back' button at the top right. The form fields are: 'Requested By' (Matthew Zawadzki), 'Request Date' (06/02/2018), 'Location' (a dropdown menu showing '00000001'), 'Entire Box' (a checkbox), and 'Details of documents' (a text area). At the bottom, there is a 'Create Retrieval' button.

Choose a box number from the **Location**, and provide details of the file required, or request the entire box by checking the box. Once you are happy with the request, click **Create Retrieval**.

When you press **Create Retrieval** you will see a message stating that the retrieval was successfully created.

The request will then be actioned by the Records Management staff. If rejected / not issued, Records Management staff will contact you.

You will also be able to see a list of all retrievals, and their status, within the Retrievals page / more filters



Please email recordsmanagement@sheffield.ac.uk / ring 23205 to return retrieved items as this cannot be organised on the database.

DISPOSALS

You will receive an email listing boxes to be disposed of, 3 weeks before the due date. On the first of the month box details will appear in the **Boxes due for Review** section on the Dashboard.

