Guidance for using the Records Management Service software

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 system

You need to be assigned and logged in to the system 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

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.

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

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

When you have signed in to the system 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

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.

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

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.
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

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

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.

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 records@sheffield.ac.uk / ring 23205 to return retrieved items as this cannot be organised on the system.

**DISPOSALS**

You will receive an email listing boxes to be disposed, 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.