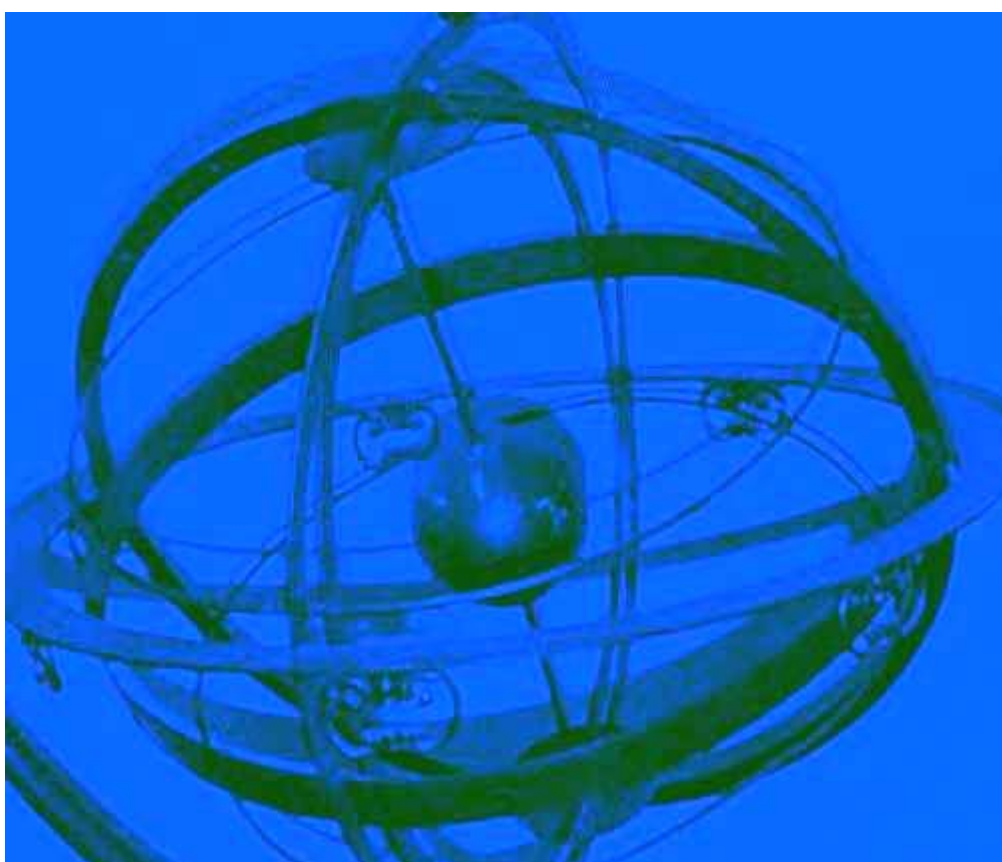


Guidelines Records Management and Archive Storage (ReMAS)

Volume 3

Simple Instructions for New Entries and Searching




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Opening the Database

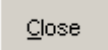
- Double click on the ReMAS icon on the desktop
- Type in *User Name* and *Sign On* password, then click *OK*
- Select the correct database by scrolling through the list using the arrow keys on the right, highlight the relevant database, then select *Open*

New Entry

- Go to *Edit* on top taskbar and select *Inventory* from the drop down list
- Click  on bottom taskbar
- Cursor should be in *Inventory Id*
- Press *Ctrl* and *2* together to copy the *Inventory Id* from the previous entry
- Alter the last digit in the number shown to the next in sequence
- Go to *From Accession* and select your Division or Department
- Go to *Series ID* and select the correct Series for your records
- Go to *Provenance* and select your Division or Department
- In *Title* enter the file title
- Use *Title Qualifier* for any additional information
- In *Control* enter any previous filing references used, for example any numerical references allocated
- In *Date Range From* put the date the file was opened, use *To* only if the file has subsequently been closed. You may need to delete the number shown in *To* as the database copies this in automatically.
- Use *Date Qualifier* if files are undated, for example enter 'current' or 'on-going'
- In *Details* enter any additional information about the file, for example contents, format, current location. As much information can be put in this field as you wish. For example, it could include details on how a file is used, or any restrictions involved.
- Use *Container and Number* for location if preferred. Add details of cabinet, shelf and room for example. This is a useful field as it will assist colleagues, CRU and successors to find individual files.
- Use *Retention* to indicate retention and weeding requirements for the files. For example;
 - ▶ How long the files are required for audit or legislative requirements
 - ▶ Weeding of files on a regular basis to comply with legislation
 - ▶ Known dates for the disposal of the files
- Use *Retention Date* to indicate the year in which the file should be destroyed, reviewed or transferred to the CRU, using the information shown in *Retention*. The format of the date is DD/MM/YYYY

NB. If you are unsure how long a file should be retained for, please check the College Retention Schedule available on Spectrum at the following link.

<http://www3.imperial.ac.uk/pls/portallive/docs/1/62304.DOC>

- Repeat the above steps for each new entry
- Click  on the bottom taskbar to close and save the changes made


Deleting Records

- Entries should never be deleted. If a file is closed or destroyed, put this information in *Details* – the database is for new information to be added, rather than old information to be taken away
- If you have any queries or concerns about any alterations made, or if a message appears that you do not understand, contact the Corporate Records Unit on cru@imperial.ac.uk or ext. 58850 and staff there will advise

Searching

- Go to *Search* on top taskbar, select *Inventory Search* then *Direct Search* from the drop down list
- Click in the field you want to search in for information
- Press *Ctrl* and *F*
- Type a search term in *Find What*.
- Choose a field to search in from the drop-down box in *Look In*. If all fields are to be searched, change this to *Inventory*. This will slow the search down significantly as every field will be checked.
- Change *Match*, the third box from the drop-down menu, to read *Any Part of Field*.
- Select *Find Next* to scroll through all records containing that keyword.
- To change a search field, click in a different field and repeat the steps above.

Reports

- Go to *Search* on top taskbar, select *Reporting* from the drop down list
- Select report from *Select a report title* drop down list
- Choose from *Sort by* to impose the order of the report, suggested option *ITEM_ID* to list the records in numerical order by Inventory ID
- Select *Preview*
- Select  from top taskbar to change the report to a Word document

Useful Reports

- *Inventory – List Report – all records* for a list of all files in the database
- *Inventory – List Report – select one Series ID* for a list of all files in a particular Series
- *Inventory – File Labels – all records* and *Inventory – Box Labels – all records* for labelling files
- *Destruction List - all sentenced records not destroyed* for a list of files due for destruction (only suitable if Retention fields have been completed).

Logging Off

- Select *Close* to exit from an input screen.
- Select *Exit* from the Main Menu in the middle of the screen.

More detailed guidelines that include pictorial guides and information on other functions are also available on Spectrum at the following link, or by contacting the Corporate Records Unit.

http://www3.imperial.ac.uk/portal/page?_pageid=288,1080437&_dad=portallive&_schema=PORTALLIVE