LOG ON AND NAVIGATION

The logon procedure and navigation tools allow you to access the system using your personal UserID and password, and navigate through its screens using the TAB key, or the mouse

Quick Reference – Log On and Navigation

LOG ON

To access CRMS, go to the Start Menu and select Ministry Connections, there you will see the CRMS 8.0.1 NEW icon, when you select it you will be taken to the CRMS website [intranet] choose Production from the CRMS 8.0.1 sites at the top of the page.

If you are prompted for your ID and password before reaching the CRMS sign-on screen, you will need to enter your username as IDIR\username and use your IDIR password to access this website.

CRMS Sign-On

FIELD	DEFINITION	EXAMPLE
UserId	Usually first initial and Last name	Kcampbell
Password	Initially same as UserID but can be changed	superman
Environment	The database in which you work. Will be autoselected	CRMS_PROD

SYMBOL	USE	EXAMPLE
↓ (Drop Down Button)	Allows you to select from a drop down list	OPR Code
... (List of Values Button)	Allow you to enter data in this field or select from a list	Primary numbers
>> (Double Arrows)	Opens the editor function	Description Field
° (Degree Symbol)	Indicates a mandatory field	Primary # field
|< or >|	Allows you to move to the beginning (|<) or end (>|) of a list	File List Screen

NAVIGATION

Use the TAB key or the mouse to move through the CRMS screens

CREATING A RECORD

There are 7 mandatory fields that must be filled in for each record:

Confidentiality Code °

- Assigned Access—the new record will only be able to be viewed by individuals within the organizational unit who have assigned access privileges
- Unit Only— IS THE DEFAULT -- the new record will be available only to the selected organizational unit
- All Units—the new record will be available to all organizational units

Schedule Number °
Primary Number °
Secondary Number °
OPR Code °

- Indicates whether or not you are the Office of Primary Responsibility

File Location °

- Only required if different from the default for the Org Unit

Opened Date °

- Entered in the form yyyy-mm-dd

Quick Reference – Creating a Record

STEP	ACTION
1.	From the main menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Select **New**
4.	Select *Confidentiality Code*
5.	Enter or Select the Schedule number
6.	Enter *Primary number*
7.	Enter *Secondary number*
8.	Enter *Series Code* and *Series Sub Code* (if needed)
9.	Select *OPR* or *NOPR*
10.	Enter *Location* (if other than default)
11.	Enter the *Opened Date* (or TAB to enter today's date)
12.	Enter the *Closed Date* (if applicable – only necessary for SO files)
13.	Select **Save**

For more information about Creating Records, consult the User Manual located on the CRMS website

CLASSIFYING RECORDS WITH THE MANUAL FUNCTION

The Manual Function can be used to find the correct classification for your records.

Quick Reference – Manual Classification

STEP	ACTION
1.	From the Records Maintenance Screen, select **New** to create a new record.
2.	Insert curser into Primary Number Field
3.	Select **Manual**
4.	Enter up to 3 separate keywords to define search criteria
5.	Select **Find**
6.	From the Classification list, select the code you believe to be correct, and click on **Details** to view more information about the classification
7.	Select **Primary** to display the description of this primary classification, scope notes, see also references and default retention schedule
8.	Select **Secondary** to display the list of secondaries associated with this primary classification
9.	Continue selecting primary or secondary details on each classification until you reach the selection you are seeking, or, clear the search criteria and set new criteria
10.	When you have decided on a classification from the list select the button to the left and your new record will be populated with schedule, primary and secondary completed for you.

CREATING A VOLUME

As you continue to add material to a file, it may eventually become too thick to manage and you may need to fill another, or several file folders. In CRMS each of the individual folders that make up the complete file is called a volume.

Quick Reference – Adding Volumes

STEP	ACTION
1.	From the Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Locate the record to which you wish to add a volume (Using Search)
4.	Select **Volume**
5.	Select the next available line
6.	Enter the *Opened Date* (in the format YYYY-MM-DD)
7.	Select **Save**

CREATING AN ENCLOSURE

Sometimes information is contained in a media such as videotapes or CDs or bound books. They most often do not fit within a file volume or need to be stored separately. In this case we create enclosures

Quick Reference – Adding Enclosures

STEP	ACTION
1.	From the Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Locate the record requiring an enclosure (Using Search)
4.	Select **Volume**
5.	Select **Enclosure**
6.	Select **New**
7.	Enter the *Media Type Number* from the selection list
8.	Enter the *Enclosure Location*
9.	Enter the *Enclosure Description*
10.	Select **Save**

Quick Reference – Viewing Enclosures

STEP	ACTION
1.	From the Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Locate the record that has the enclosure (Using Search)
4.	Select **Volume**
5.	Select the Volume with the enclosure
6.	Select **Enclosure**
7.	Select **Next** to view the first enclosure

For more information about Volumes and Enclosures, consult the User Manual located on the CRMS website.

PRINTING LABELS

CRMS can automatically generate folder labels for all volumes and enclosures that you have entered. You can either print the label for an individual record or you can print labels for a group of records at once. If you wish to print labels for a group of records, you must determine what these records have in common, so that you can enter that information as the criteria in a search.

Quick Reference – Printing Labels

STEP	ACTION
1.	From the Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Select **Find**
4.	Enter your search criteria to locate the correct record(s)
5.	Select **Count**
6.	Select **Retrieve**
7.	From the resulting file list, you can selectively choose one, many or all of the records listed
8.	Once the appropriate records have been selected, click on **Label**
9.	Select the number of copies you wish for each label (default is 1)
10.	If you don't want the dates printed on your labels, deselect the *"Include Dates"* box
11.	If you have a smart label printer, select the appropriate one If you are using a laser printer, select the starting position on the label sheet
12.	Select **View**
13.	After previewing the labels select *Print* from the preview screen

For more information about Printing Labels, consult the User Manual located on the CRMS website **[intranet]**

PRINTING REPORTS

File lists are the most commonly printed report. To print a file list, you must first determine which files you would like to include on your list. Then you will perform a search for these records. Once you have the list of records you wish to print, you can print either a standard numeric file list, a condensed numeric file list, a standard alpha file list, or a condensed alpha file list

Quick Reference – Printing File Lists

STEP	ACTION
1.	From the Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Select **List Files** to go directly to the list of all records, or select **Find** to set search criteria
4.	Select type of sort you want (**Alpha** or **Numeric**)
5.	Select the records you wish to include on your list, or if you want them all click on the **Select All** button
6.	Click on **Print**
7.	Select *Standard*, *Condensed*, or *Descriptive*
8.	Select *Print* from the preview screen

SEARCHING

Searching is a powerful tool in CRMS. Once you learn how to set up the searches, you will find that working with a smaller set of records rather than the whole database, increases the speed of your tasks, and enables you to see only the records you want

There are a number of special symbols you may need to perform your searches, but the most important key to effective searching is determining what criteria are common to all the records you want, and yet different from the rest of the records in the database

Quick Reference – Search Symbols

SYMBOL		EXAMPLE (VALUE FOR PRIMARY FIELD)
%	Wildcard	%100 = all ending with 100 (eg 100, 7100, 13100, etc) 100% = all beginning with 100 (eg 100, 1000, 1006, etc) %100% = all with 100 in them (eg 8100, 81003, etc)
>	Greater Than	Records greater than >100 = 101 to end
<	Less Than	Records less than <6450 = 6449 to 100
:	Range	Records in between 100:199 = 100 to 199
	Blank	Exact match 100 = 100

Quick Reference – Searching

STEP	ACTION
1.	From the Record Maintenance Screen select **Find**
2.	If you don't see the Fields you wish to search in, Click on a list of values button (**...**) and select the field
3.	Enter your search criteria as a single value, a range of values, or a partial value using the wildcard (**%**)
4.	Click on the **Find** button