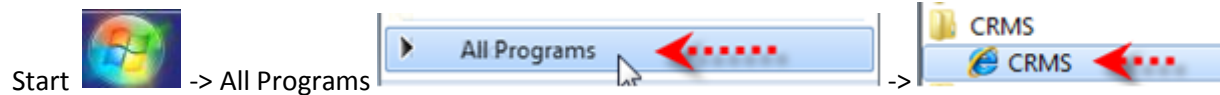


CRMS Quick Training Guide

What is CRMS?

CRMS stands for *Corporate Records Management System*. It is used to help manage your physical paper folders effectively for in-office use, offsite storage, and destruction.

How do I access CRMS?

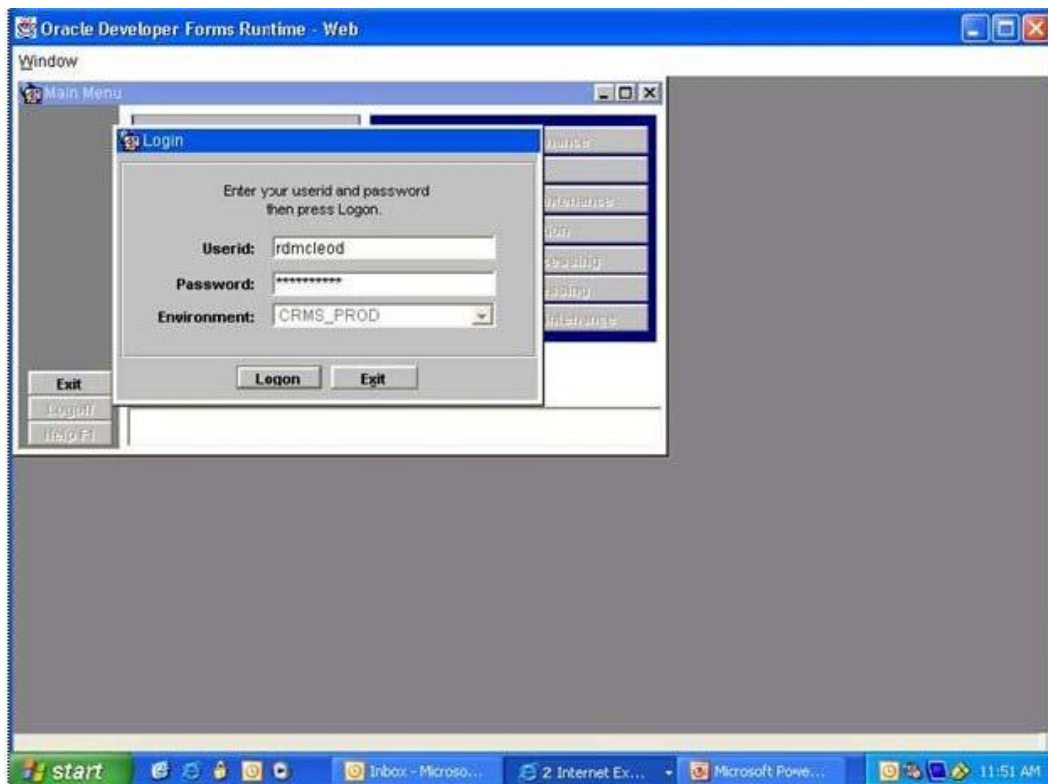


Need Assistance?

- **For Support** – Send technical queries to EDRMS.Help@gov.bc.ca. For disposition processing help, contact your Pod support.

Log On Screen

When you click on **Production**, you will be prompted to enter in your **Userid** and **Password**.



Main Screen



- **Records Maintenance** – You can create, edit, print labels, print file lists, and maintain records entered into an organizational unit.
- **Reports** – Where you can print system generated reports. I.e. Box Content Lists, Standard File Lists.
- **Classification Maintenance** – Administrator access only.
- **Administration** - Administrator access only.
- **Disposition Processing** – Used to prepare records for off-site transfer and destruction of records.
- **Rollover Processing** – Used for Calendar Year (CY) and Fiscal Year (FY) records that are created every year.
- **Ministry** – This field indicates your ministry's code.
- **Org Unit** – A pull down menu that shows the org units you have access to. The default Org Unit will be listed first, then use the pull down menu to search for other org units.

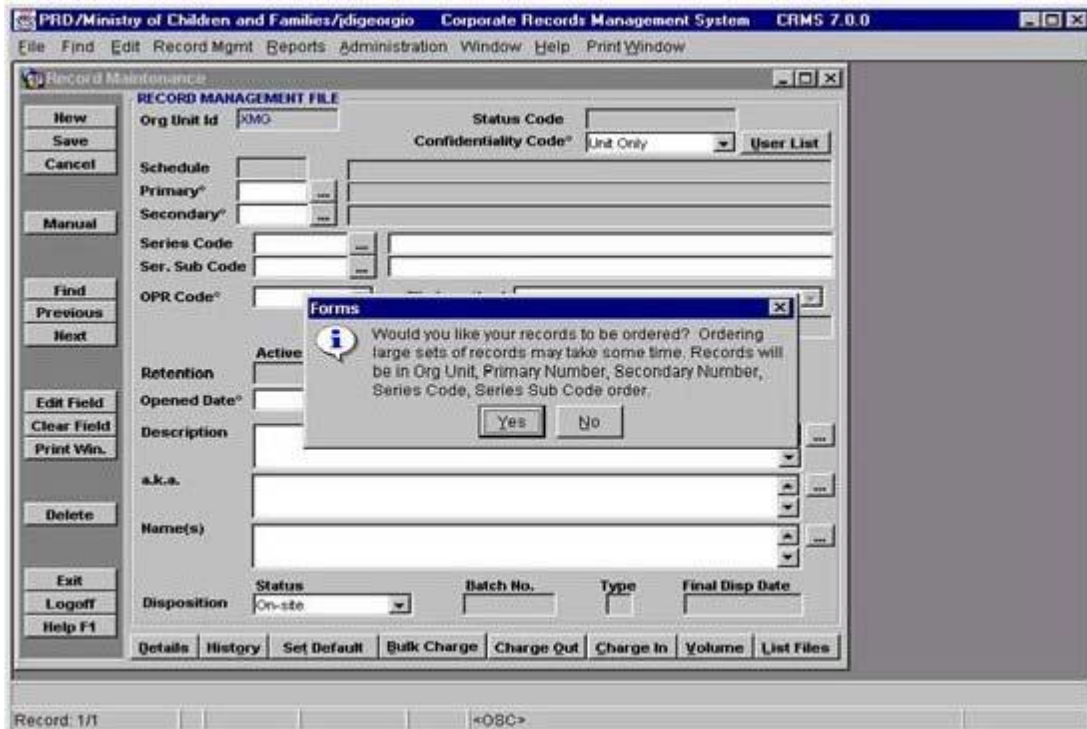
Records Maintenance Window

Every time you click on the Records Maintenance button, a dialogue box appears, asking if you would like your records to be ordered:

- **YES** – Brings up all active records. You can conduct a search once all the active records come up.
- **NO** – Brings up records a few at a time. You will need to specify the records you want through the **Find** button in the left column.

Most Commonly Used Buttons Located in the Left Column Toolbar

- **NEW** – Creates a new record.
- **SAVE** – Saves a record.
- **CANCEL** – Cancels the last function.
- **MANUAL** – Brings up a keyword search function when searching for appropriate classification to classify a record.
- **FIND** – Brings up the search parameter screen. Your search can be specific or broad ranging.
- **PREVIOUS/NEXT** – Scrolls through the records.
- **CLEAR FIELD** – Will clear the data in the field that your cursor is in.
- **EXIT** – Click on this button to exit this page.
- **LOGOFF** – Logs out of CRMS.

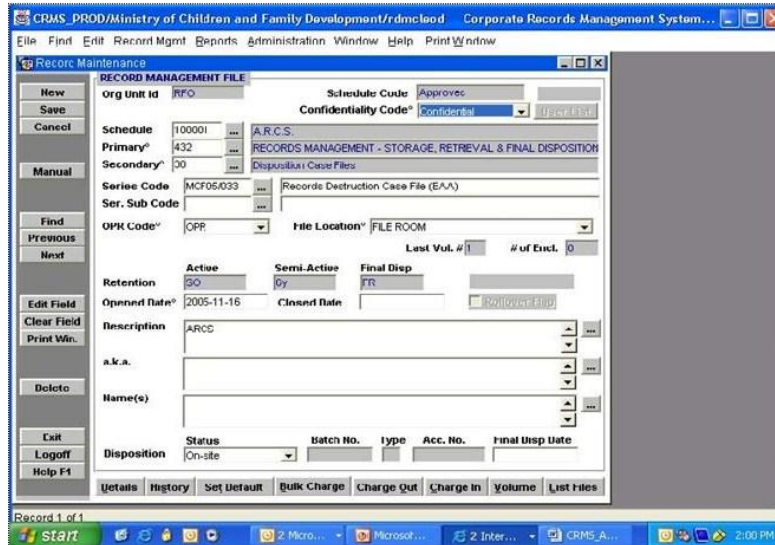


Most Commonly Used Buttons Located on the Bottom Toolbar

- **DETAILS** – Provides information on the record. I.e. schedule, primary, and secondary numbers.
- **HISTORY** – Will tell give you creation and edit information.
- **SET DEFAULT** – Used when creating multiple folders with the similar information.
- **BULK CHARGE** – Used when charging out a large amount of records to a specific person or location.
- **CHARGE OUT** – Used when charging out a single or a couple of records to a specific person or location.
- **CHARGE IN** – Used when placing the records back into the filing room.
- **VOLUME** – Used to create additional volumes and to list them together.
- **LIST FILES** – Will list all records found. Used with printing labels and reports.

Record Management File Fields

- **SCHEDULE** – Tells us the schedule number of the ORCS or ARCS.
- **PRIMARY** – ARCS or ORCS primary number
- **SECONDARY**– ARCS or ORCS secondary number.
- **SERIES CODE** – The first level of file identification, after the primary and secondary numbers. Known as the tertiary number.
- **SER. SUB CODE** – This is the secondary level of information (Optional).
- **OPR CODE** – Office or Primary of Responsibility.



- **FILE LOCATION** – where the file is located.
 ** The file needs to be located in the File Room in order to be off-sited or destroyed.
 **
- **RETENTION** – determined by Schedule, Primary, Secondary, and OPR status.
- **OPENED DATE/CLOSED DATE** – for CY and FY files, CRMS will automatically populate the dates. The user will need to populate the date for SO files.
- **DESCRIPTION** – optional location for additional notes on the record
- **FINAL DISPOSITION DATE** – generated once the end of active period has been determined and the closed date has been entered.

Set Default Function

1. Enter in the common data. I.e. primary, secondary, OPR status.
2. Click on **Set Default**. The button should change to **Clear Default**.
3. Finish entering the information into the record fields. Click **Save**.
4. Click on **New** and the common fields will already be populated.
5. Repeat steps 4 and 5 for how many folders you would like to create.
6. When complete, click **Clear Default** on the bottom bar to clear your default settings.

Navigation

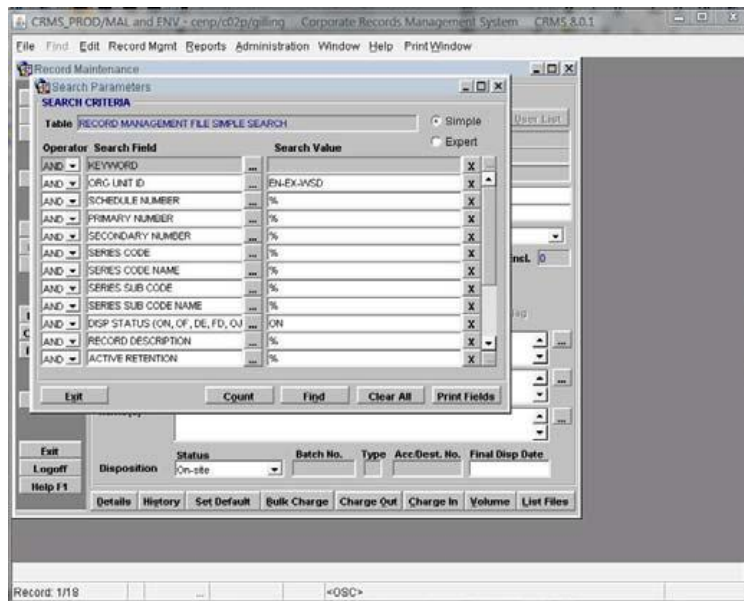
When working in CRMS, in order to go back to the previous screen you were working in, click on the **Exit** button located in the bottom of the left toolbar.

To close out of CRMS, click on the **Logoff** button located in the bottom of the left toolbar.

Do not use the  to close out of CRMS.

Searching in CRMS

To search for a record in CRMS, click on the **Find** button, located in the left column. The search criteria window will open.



In the **Search Criteria** window, there are three columns that will assist you with searching.

- **OPERATOR** – Enables you to search with AND, OR, NOT for more flexibility.
- **SEARCH FIELD** – Lists the types of searches available to you.
- **SEARCH VALUE** – Is the field where you enter the word or characters you seek.

The percent symbol, % , is the default value for each **Search Value** field. The percent symbol is the wildcard symbol and will expand your search.

Once CRMS has retrieved your records, the records will be listed in the **Search Results** window. Each record will be listed with the following columns:

Org Unit ID, Classification, Series Code, SS Code, OPR, Retention Schedule

- To select your record, check off the box located on the far right end of your record(s) line.
- To open a record, click on the gray square located in the far left end of your record(s) line.

Printing Labels

1. Search for your records.
2. In the **Search Results** screen, select the records you would like to print a label for, by checking off the box in the far right column.
3. Click on the **Label** button. The **Label Parameter** screen will open.
4. If you have a Smart Label printer, select that option. If not, select the **Start Position** on your label sheet and the number of copies you would like.
5. Click **Print**. Adobe Acrobat Reader will open a new Internet Explorer window so you can view your labels.
6. Select **Print** under the **File** menu. Select your printing options under **Properties**.
7. Select **Print**.

Adding Volumes

1. Search for the record you would like to add a Volume to.
2. Click on the **Volume** button on the bottom toolbar. A new window will open, enabling you to add your volumes.

Org Unit Id	Classification	Series Code	Ser. Sub Code	Act. Ret.	SA Ret.	FD
EN-EX-RGD	1665-20	APPLICATIONS	ONLY	50	10y	SR

Volume No.	Opened Date	Closed Date	Last Encl	Acc./Best No.	Box No.	Disposition Status	Disposition Batch#	Label
1	2006-09-27		0			On-site		<input checked="" type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>

Disposition Exception Note
Volume Description
Vol. Location FILE ROOM

Enclosure

Volume Number - System Generated.
Record: 1/1

3. Select the next blank line under the last entered volume.
4. Place your cursor in the mandatory **Opened Date** field, enter a date. Press **Enter**.

*The format must be YYYY-MM-DD. You cannot enter a **Volume Opened Date** that is outside the range of the Record's Opened and Closed dates. If the record's open and closed dates are modified or removed, the volume dates will also be altered.*

*Once you have entered in the opened date of the new volume and clicked on **Save**, the system will modify the closed date of the previous volume to the day before the new volume was opened. If the*

file has the same opened and closed date, or there are no days left for the previous volume to close a day earlier, you will be allowed to save volumes with the same opened and closed date.

5. Keep adding volume`s, as necessary, until the file is closed.

Adding Enclosures

1. Search for the record you would like to add an Enclosure to
2. Select the **Volume** on the bottom toolbar. A new window will open. On the lower left, click on the **Enclosure** button.
3. Select a **Media Type Number** by clicking on the gray square with three black dots. A list of options will open.
The **Box Number**, **Disposition Status** fields, etc will be automatically populated if there are values in the same fields in the **Records Maintenance** screen for that record.
4. Enter the **Enclosure Number** and the **Description** fields.
5. Click **Save** and **Exit**, to close the window.
6. Click **Exit** to return to the **Records Maintenance** screen.

Rollover Processing

Rolling over a record into the next fiscal or calendar year automatically creates a record for the new year, with the previous year's information. Though the rollover processing feature is located within its own menu, the records must be marked for rollover from the records maintenance screen. In addition to rolling over records, you can find and print rollover lists using the system's FIND and PRINT features.

(A) Setting the Rollover Flag

Before a record can be rolled over, it must have the rollover box checked in record maintenance. This can be done when the record is first created, or later on in the process.

1. From the main menu, select **Record Maintenance**.
2. Find the records you wish to rollover by primary number or closed date.
3. CRMS is unable to rollover SO files, (no closed date) so you must refine the search to exclude them. Enter a search field with the **Operator** field changed to NOT and SO for the **Active Retention** search value.
4. Select **Find**.
5. If you want to rollover only one record, click on the box to the left of the record in the list to bring the record up in the Record Maintenance screen. Select the **Rollover Flag**.
6. If you want to rollover several records at one, check the **Select** box to the right of the records you want, and then click on **Update**.
7. By selecting the **Rollover Flag** in the Update screen, and choosing **Bulk Update**, all the records selected will have their flags check-marked. You will then be warned that you are about to update # records, and asked if you want to proceed. Select **OK** to proceed or Cancel to cancel the update.

Remember that the **Rollover Flag** must be selected to roll the record over to the Rollover Processing menu.

8. Select **Exit**, you can now rollover the records in the Rollover Processing menu.

(B) Rollover Processing Screen

1. From the Main Menu, select **Rollover Processing**

The Rollover Processing screen has a number of fields:

- ORG Unit ID – record's Org Unit
- Type of Rollover – Fiscal, Calendar, or 6-mnths
- Year – year the file was closed
- Month – if 6 mnth is selected as the type this field will be displayed.
- Rollover Date – date the record will be rolled over
- Maximum Records – maximum number of records to be rolled over

2. Select **Type Of Rollover** to determine if calendar, 6 month or fiscal records are going to be rolled over.

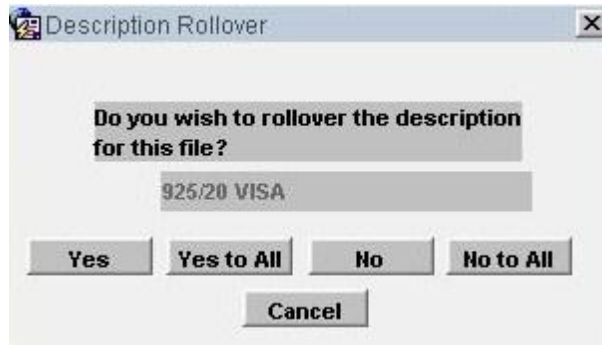
3. Select **Count** to find out how many records of the type specified are ready for rollover. If the number of records that will be retrieved is greater than expected, you can use **Find** to narrow the search.

4. Click on **List** to bring up the records chosen for rollover - this is the list of records available for rollover.

5. Mark the **Select** box next to the records in the Search Results screen

6. Select **Rollover** and **OK**. You will need to confirm that you want to rollover the selected number of records.

7. If any of the records selected for rollover included text in the Description field, you will see the following message:



If the description from the previous year's record still applies, then select **Yes** or **Yes To All**. If you would like to enter new descriptions for the new records, then select **No** or **No To All**.

8. Select **OK**.

9. If you return to the Record File Maintenance screen and bring up the rolled over record, you will see the phrase "Rolled Over" in red above the Rollover Flag.

(C) Printing Rollover Lists

1. From the Main Menu, select **Rollover Processing**. You must first create the list before it can be printed.
2. Select the **Type of Rollover** from the pick list.
3. Select **Find** or **List**.
4. Mark the **Select** box next to the record(s) and select **Print**.
5. Select a list type to view and print your list.

Disposition Processing

When you click on the **Disposition Processing** button on the main CRMS page, CRMS gives you the following options:

- **DESTRUCTION OF RECORDS** – Here you can create destruction batches for records that are ready for DE.
- **TRANSFER TO OFF-SITE STORAGE** – Here you can create disposition batch for records the
- **STORAGE CONTAINER MAINTENACE** – Determines when a box will be moved to final disposition and if it can be destroyed or transferred to BC Archives. This is a MRO function.
- **DISPOSITION BATCH MAINTENACE** – Monitors and edits disposition batches, regardless of their retention. This is a MRO function.

Destruction of Records

1. From the main menu, click **Disposition Processing**.
2. Click on **Destruction of Records**.
3. The **Search Criteria** window will open. Search for your records.
4. Your records will populate in the **Destruction File List** window.



5. Select the records you want to destroy by checking the box in the far right column.
6. Click on **Create Batch**, located on the bottom toolbar. CRMS will give you a batch number and populate it in the batch number field, located at the top of your screen. The batch number is a generated CRMS number.

*After you create the batch, you will notice that there are now two lines for each single entry. The first row indicates the **F level**, or file level. The second row indicates the **V level**, or volume level.*

7. Click **Get Destruction** and enter in the Destruction number.
8. Click OK. Your records are now tied to the batch and destruction number.

*** It is best to print off your **Eligibility Report/Batch Report**. See instructions below. ***

9. To box your records, select the records in the far right column.
10. Click **Confirm Boxed**. Enter in the box number. I.e. 2 for box 2. The box number will appear in the **Box #** column of the V level for each file.
11. Repeat steps 9 and 10 until all your files are boxed in CRMS.

Printing off the Eligibility Report/Batch List

** This process can be used for both Destruction and Transferring Records to Off-site Storage. **

Before boxing up your records in CRMS, it is best to print off an **Eligibility Report/Batch Report** to determine which files you are boxing up. Take this report into your filing room and mark off which file belongs in which box.

Then do the following in CRMS:

1. From the **Destruction List** window, select all the records in the far right column, by checking the box for each record or click **Select All** in the bottom toolbar.
2. Select **Print** in the lower right corner.
3. CRMS will open a print preview screen.
4. Select the print icon or select **File | Print**.

Confirming Batch Destruction

1. From the main menu, select **Disposition Processing**.
2. Select **Destruction of Records**.
3. Search for the records that have been destroyed. You can search by the disposition batch number or the destruction number.
4. Select the destroyed records, by checking the box in the far right column.
5. Select **Confirm Destroy**.
6. Enter in a **Destruction Date** and any notes about the destruction of this batch.
7. Click **OK**.

Transferring Records to Off-Site Storage

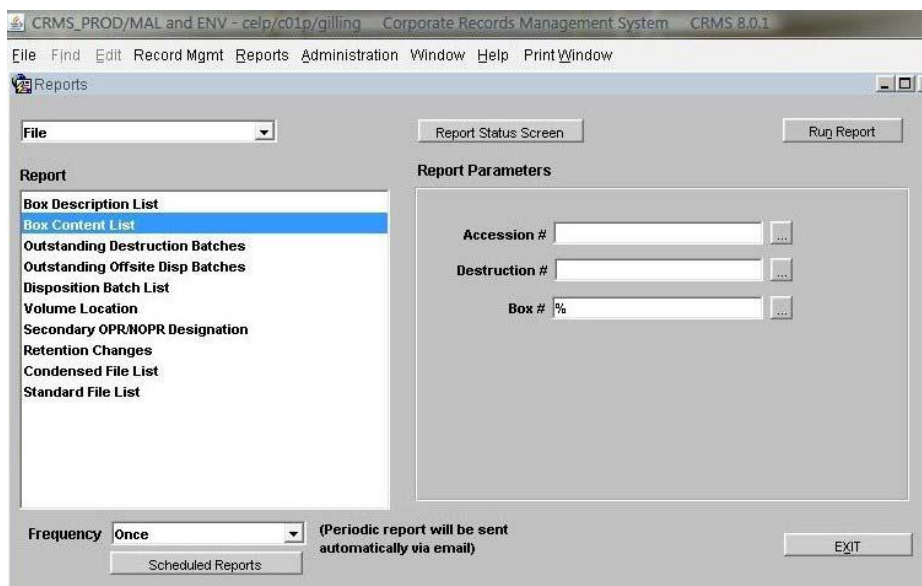
1. From the main menu, click **Disposition Processing**.
2. Click on **Transfer to Off-site Storage**.
3. The **Search Criteria** window will open with an information alert, asking which files you would like to transfer. Select **End of Active**.
4. The **Search Criteria** will open. Search for your records.
5. Your records will populate in the **Off-Site File List** window.
6. Select the records you want to off-site by checking the box in the far right column.
7. Click on **Create Batch**, located on the bottom toolbar. CRMS will give you a batch number and populate it in the batch number field, located at the top of your screen. The batch number is a generated CRMS number

After you create the batch, you will notice that there are now two lines for each single entry. The first row indicates the **F level**, or file level. The second row indicates the **V level**, or volume level.

8. Click **Get Accession #**. Enter in both the accession and application number.
9. Click OK. Your records are now tied to the batch and accession/application number.
10. Print off your **Eligibility Report/Batch List** (see steps above).
11. To box your records, select the records in the far right column.
12. Click **Confirm Boxed**. Enter in the box number. I.e. 2 for box 2. The box number will appear in the **Box #** column of the V level for each file.
13. Repeat steps 9 and 10 until all your files are boxed in CRMS.

Reports

On the main menu, the **Reports** button enables you to search and print off reports, such as the Box Content List, Standard File List, and Condensed File List.



The screenshot shows the 'Reports' window in the CRMS 8.0.1 application. The window title is 'CRMS_PROD/MAL and ENV - celp/c01p/gilling - Corporate Records Management System - CRMS 8.0.1'. The menu bar includes 'File', 'Find', 'Edit', 'Record Mgmt', 'Reports', 'Administration', 'Window', 'Help', and 'Print Window'. The 'Reports' window has a 'File' dropdown menu and a 'Run Report' button. The 'Report' list on the left includes: 'Box Description List', 'Box Content List' (highlighted), 'Outstanding Destruction Batches', 'Outstanding Offsite Disp Batches', 'Disposition Batch List', 'Volume Location', 'Secondary OPR/MOPR Designation', 'Retention Changes', 'Condensed File List', and 'Standard File List'. The 'Report Parameters' section on the right contains three input fields: 'Accession #' with a search icon, 'Destruction #' with a search icon, and 'Box #' with a search icon. At the bottom, there is a 'Frequency' dropdown set to 'Once', a 'Scheduled Reports' button, and a note: '(Periodic report will be sent automatically via email)'. An 'EXIT' button is also present.

Printing the Box Content List

1. In the upper left corner, on the pull down menu select **Preview**.
2. In the Report column, on the left side of your window, highlight the report name **Box Content List**.
3. In the **Report Parameters** column, on the left side of your window, three fields will appear: **Accession #**, **Destruction #**, and **Box #**.
 - If you are printing off a Box Content List for a destruction application, enter the destruction number.

- If you are printing off a Box Content List for an off-siting application, enter in the accession number.
- If you would like to print off the Box Content List for a specific box, enter in the box number.
- If you would like to print off all the boxes for the off-siting or destruction application, leave the **Box #** field blank.

4. Click on **Run Report**, in the upper right corner.

5. CRMS will open the **Report Statuses** window and the report will appear on the first line.

Check to make sure the Report Status column reads **COMPLETED**. Select the report and click the **View Report** button in the lower left corner.

The screenshot shows a window titled 'Report Statuses' with a table containing the following data:

Report Name	Request Date	Start Time	End Time	# of Pages	Report Status	Format
RMSRBINC	14-JUN-03 21:22:47	21:22:47	21:24:52	2	COMPLETED	FILE
RMSRBDES	14-JUN-03 21:21:28	21:21:29	21:22:16	1	COMPLETED	PREVIEW
RMSRORGA	14-JUN-03 21:09:24	21:09:24	21:12:20	257	COMPLETED	FORMS
RMSRBDES	14-JUN-03 12:05:08	12:05:08	12:05:56	1	COMPLETED	FILE
RMSCONA2	14-JUN-03 11:51:40	11:51:40	11:51:46	197	COMPLETED	FILE
RMSRSECL	14-JUN-03 11:47:07	11:47:08	11:47:44	142	COMPLETED	FILE
CRMS_R2	14-JUN-03 11:37:39	11:37:39	11:37:47	22	COMPLETED	FILE
RMSRLOCV	14-JUN-03 11:00:26	11:00:27	11:00:29	1	COMPLETED	MAIL
RMSRLOCV	14-JUN-03 10:46:29	10:46:29	10:46:32	1	COMPLETED	PREVIEW
RMSRLOCV	14-JUN-03 10:40:01	10:40:02	10:40:05	1	COMPLETED	MAIL

Below the table are three buttons: 'View Report', 'Update Statuses', and 'Exit'.

6. Your report will open in a new window. Select the print icon or select **File | Print**.