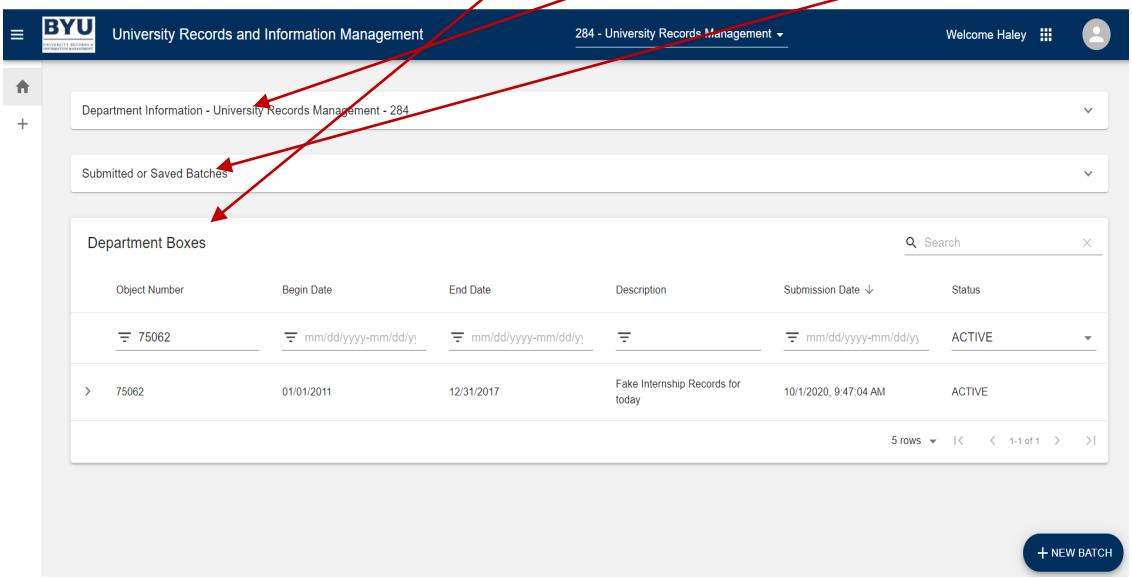
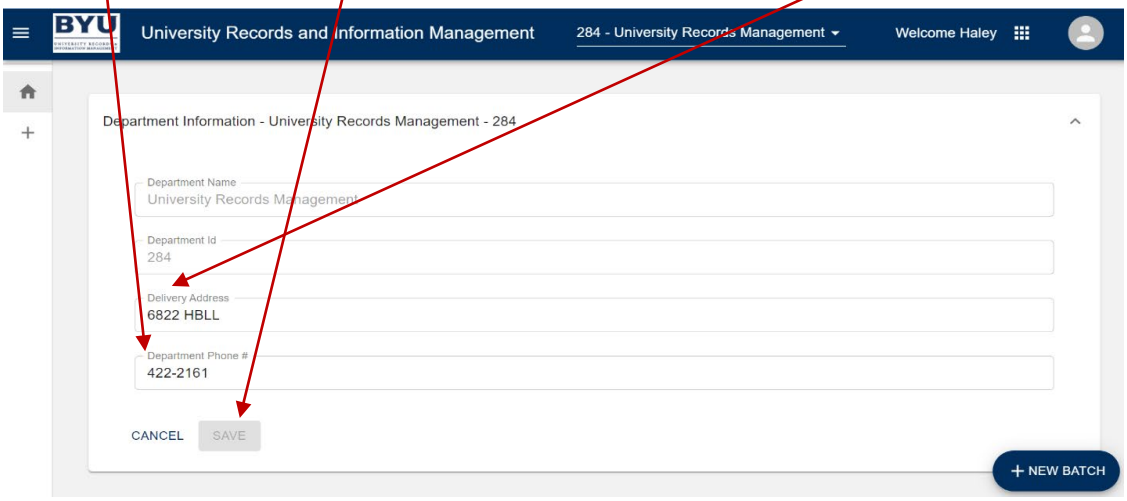
Submitting Boxes to University Records Management

Getting started with the electronic Records Transfer Sheet submission app: (eRTS)

1. Go to urim.byu.edu to login. Use your BYU Net ID and password when prompted by the BYU CAS login screen.
2. The eRTS system will open and display your department information, any saved or submitted batches and any boxes previously submitted.



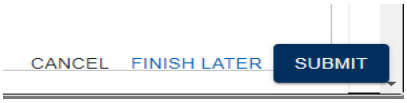
3. Select the "Department Information" bar to view and update your department address and phone, then select Save.



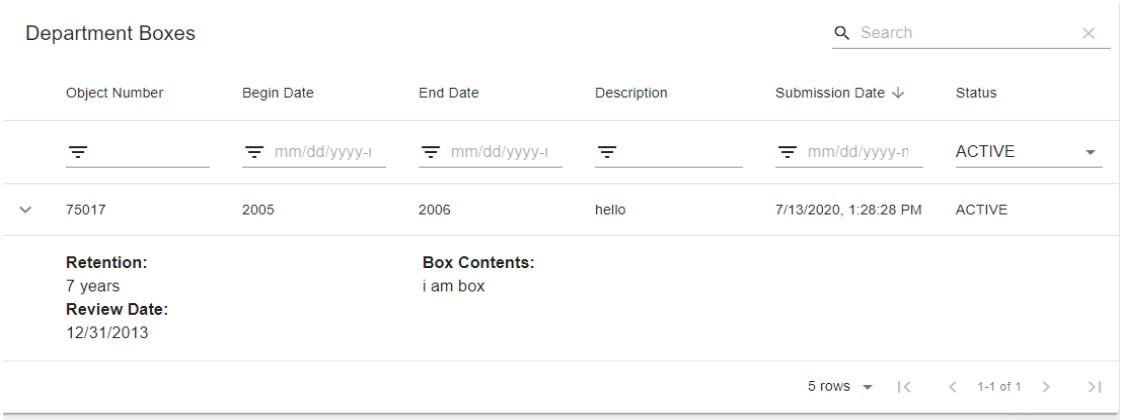
4. If you are associated with multiple departments, select the top menu drop down to move between departments.

5. Select the “Submitted or Saved Batches” bar to view previously submitted or saved batches that have not been processed. A batch is a collection of boxes submitted together as a single group.
    a. Select the Edit pencil to review and/or edit a batch.

    b. After making changes, select Finish Later to save changes so you can come back later, Submit to submit the batch, or Cancel to close out of the batch without saving changes.



6. A list of previously submitted boxes will display at the bottom of the main screen.
    a. Use the header to Filter and Sort the list of Boxes
    b. Select a row to view or close the details of a Box.



Important Information before Creating a New Batch

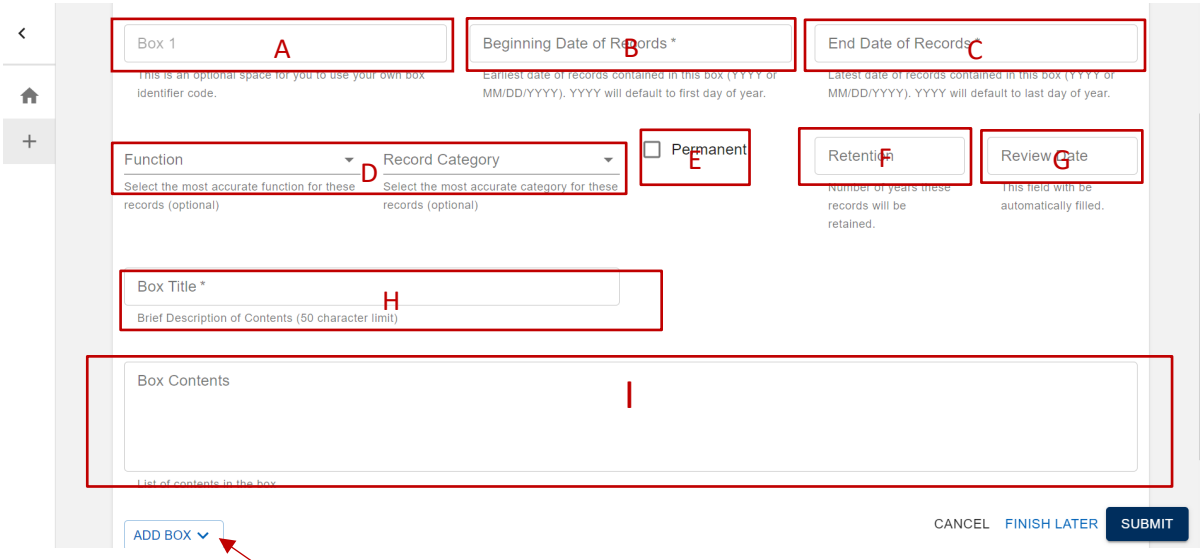
Before creating a new batch please consider the following:

- When submitting multiple boxes, please mark each box with a temporary sticky note. Use 1, 2, 3, etc…. or create your own numbering arrangement.
- Each Box should contain records with similar retention
    - Never mix Historical Records with Non-Historical Records
    - If a box is filled with several types of temporary records, the longest retention will be applied to the box.
    - Boxes of permanent records that are not considered historical, will not be sent to the University Archives. Permanent should be selected, but “Not Historical” should be added as part of the box title.
    - It is important to identify the contents of each box so records can be found in the future. As experts of your department’s records, document the records in a way that makes sense to your department. For example, if the box contained advisement records for graduated students, consider listing out the names of each student in *the Box Contents* area.
- Use your department’s Department Records Retention Schedule (DRS) for guidance on how long to retain records. For additional guidance, contact the Records Analyst at haley_dunkley@byu.edu

Submitting a New Batch

1. Select "+ New Batch" in the bottom right of the screen to prepare one or more new boxes for submission to University Records.

2. Enter the following information for the first box
    a. Box identifier code – Leave this blank unless you use a specific code to label your boxes
        i. If left blank it will auto populate with Box 1, Box 2, etc…
    b. Beginning Date – enter the beginning year or date of the records within the box
    c. End Date – enter the ending year or date of the records within the box
    d. Optional – use the Function/Record Category lookups to find the retention of your records. When using the Function/Record Category, the "Permanent", Retention and Review Date fields will auto populate. They can be modified manually
    e. Permanent – if selected, the boxes will be reviewed for historical preservation, unless the title contains "Not Archival." The Retention field will be disabled
    f. Retention – Enter the number of years to be retained. Refer to your Department Records Retention Schedule (DRS)
    g. Review Date – this field will be auto populated using End Date + Retention = Review Date. The Review Date is the date the box will be eligible to be reviewed for destruction
    h. Box Title – Short Description of the Box Contents (i.e. Student Advisement Records, Cashnet Deposits, Personnel Records, Faculty Contracts, etc.)
    i. Box Contents – enter or copy/paste a detailed description of the box contents. This field is searchable and will be used to find records in the future.



3. Add Another Box
    a. Select Add Box in the bottom left-hand corner, then select Blank Box or Duplicate Box
        i. Blank Box will create a new Box Submission Form
        ii. Duplicate Box will create a duplicate Box. The Box Contents field will not be duplicated, but all other fields will be auto populated
4. After all Boxes have been added, the user has three choices
    a. Cancel – which deletes the batch (unless you have previously saved the batch)
    b. Finish Later – saves the batch so the user can come back later to finish
    c. Submit – submit batch for approval and pickup by University Records.

Call or email URIM for help with this app. 2-2828 or urim@byu.edu