

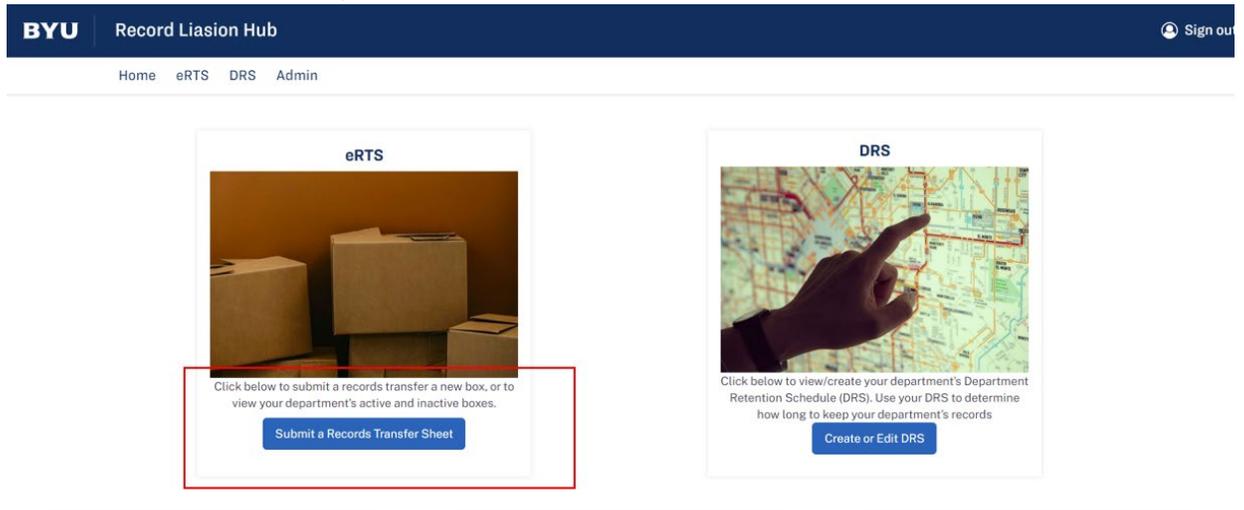
# eRTS App User Training

Our new eRTS app on the Records Liaison Hub allows users to submit new records transfer sheets for boxes in addition to granting users the ability to view any active or inactive boxes that have ever been submitted by their department, and to determine the retention of the boxes they are submitting using their DRS.

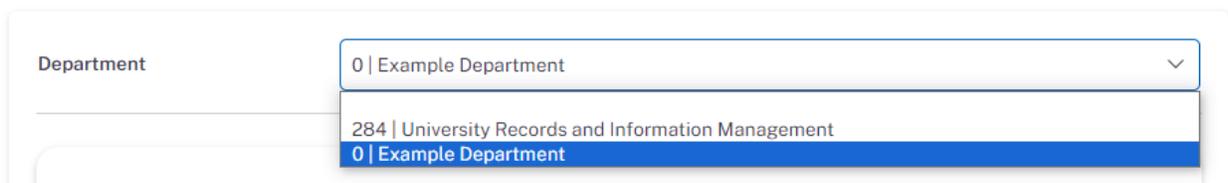
For help defining any words in this training, please see the glossary on the last page of this document.

## Navigating the Home Page

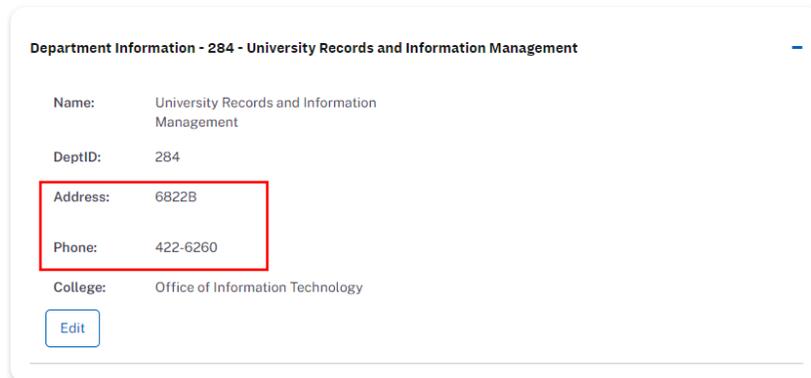
1. Go to the Records Liaison Hub at [urim.byu.edu](http://urim.byu.edu) and login with your BYU Net ID and password.
2. Click *Submit a Records Transfer Sheet*.



3. If you are associated with multiple departments, select the *Department* drop down menu to move between departments:



4. Select the *Department Information* bar to view and edit your department address and phone# :



5. Select the *Saved or Submitted Batches* bar to view previously submitted or saved batches that have not been processed.

**Saved Or Submitted Batches** -

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**O - MxAdmin**

Status: SAVED on: 8/22/2024, 1:26 PM

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- a. Select *Edit* to review and/or edit a batch.
- b. After making changes, select:
  - i. *Finish Later* to save changes so you can come back later.
  - ii. *Submit* to submit the batch for approval.
  - iii. *Cancel* closing out of the batch without saving changes.
6. A list of currently active boxes will be displayed at the bottom of the main screen.

**Department Active Boxes**

Object Number	Description	Date Range	Status	Retention	View Contents
56549	Your Box Description	1/1/2001-1/1/2002	ACTIVE	3	<input type="button" value="Open"/>

7. Next to the heading “Department Active Boxes”, there are 3 buttons.
  - a. Select the *All Box View* button to view boxes with any status for your department.

**Department All Box View**

Object Number	Description	Contents	Status
123456	This is my box's description.	Item 1 Item 2 Item 3 Item 4 ... Item 378	ACTIVE

1 of 1

- b. Select *Email Specific RTS's* to email yourself or another individual several Records Transfer Sheets at the same time.
  - i. To do so click that button then select the desired boxes, and click *Send Email*.
- c. Select *Export All Active to Excel* to export a list of all of your department’s active boxes.

## Viewing Department Records

1. Currently active boxes are displayed, by default on the page.
  - a. For each box you can select *Open* to view the box’s retention, submission date, and contents. Once opened there is also a button to create and share PDFs of that box’s Record Transfer Sheet.
2. To view all boxes, active or not, select *All Box View*.
  - a. Use the different headers to filter and sort this list of boxes.

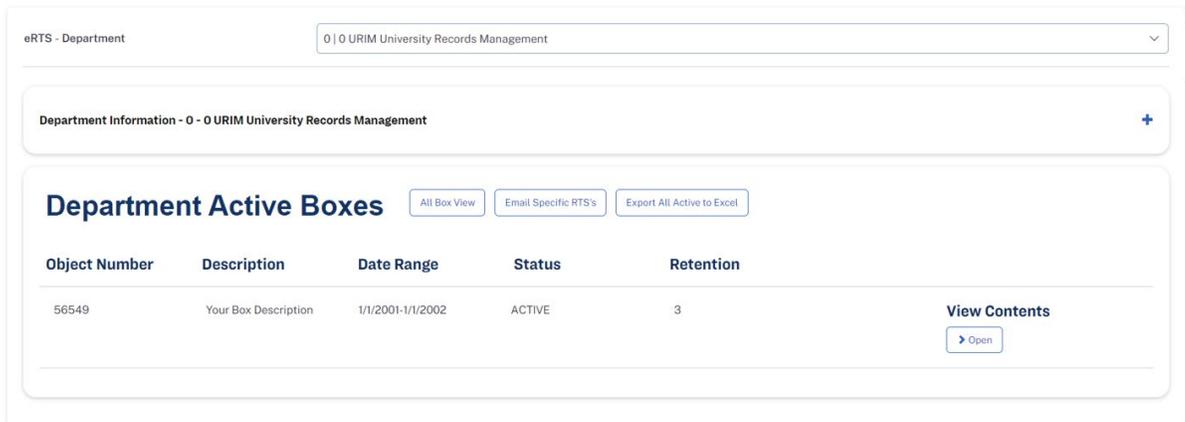
- b. Select the  icon to access expanded fields such as Review Date and the Date Range of the records within the box.

## Things to Know Before Submitting a Records Transfer Sheet

1. When submitting multiple boxes, please mark each box with a **temporary** sticky note so the courier knows which box is which. (Ex: Boxes 1, 2, 3 or A, B, C)
2. Do **not** make any permanent markings on the boxes – every box in the Records Center must look identical so that someone unauthorized cannot easily find the records they are looking for.
3. Individual boxes must contain records with similar retention:
  - a. Never mix Historical records with Non-Historical records.
  - b. Never mix Permanent records with Temporary records.
  - c. If a box is filled with several types of temporary records, the longest retention will be applied to the box.
  - d. Boxes of permanent records that are not considered historical will not be sent to the University Archives.
  - e. It is important to identify the contents of each box so records can be found in the future. As the expert of your department's records, document the records in a way that makes sense to your department. (Ex: For a box containing advisement records for graduated students, consider listing out the names of each student in the Box Contents area)
4. Use your department's Department Records Retention Schedule (DRS) for guidance on how long to retain records. For additional guidance, contact the URIM Records Analyst or email [urim@byu.edu](mailto:urim@byu.edu).

## Submitting a Records Transfer Sheet

1. Select *Add New Box* in the bottom right of the screen to prepare one or more new boxes for submission to University Records.



eRTS - Department: 0 | 0 URIM University Records Management

Department Information - 0 - 0 URIM University Records Management

**Department Active Boxes** All Box View Email Specific RTS's Export All Active to Excel

Object Number	Description	Date Range	Status	Retention
56549	Your Box Description	1/1/2001-1/1/2002	ACTIVE	3

View Contents  
Open



2. Enter the following information for the first box:
  - a. *Optional: Personal Box Identifier* – If your department uses any codes for identifying boxes outside of just 1,2,3, etc, put that code here. Otherwise leave it blank and it will automatically populate with Box 1, Box 2, etc.

- b. *Start Date* – Enter the earliest date of records within the box.
  - c. *End date* – Enter the ending year or date of records within the box.
  - d. *Description* – Brief description of contents. (i.e. Student Records)
  - e. *Function (Optional)* – Select the most accurate function from the dropdown menu. This menu is pulled from your department’s Department Retention Schedule or from the Common Records List.
    - i. *Category* – Each function has subcategories. Select the most appropriate from the dropdown menu.
    - ii. If you cannot find the correct function, uncheck the blue box to show more options from the General Retention Schedule (GRS).
  - f. *Retention* –The number of years the records will be retained, this is automatically updated if you use the *Function* and *Category* dropdowns listed above. If not using those dropdowns, please enter this manually.
  - g. *Contents* – List all contents of the box in as much detail as possible. (i.e. student names and graduation dates)
  - h. *Record Type* –
    - i. *Permanent* – If selected, the box will be retained permanently.
    - ii. *Historical* – If selected, the box will be reviewed for historical preservation in University Archives.
    - iii. *Confidential* – If selected, the box should never end up in the University Archives.
3. Add another box by selecting:
- a. *Duplicate Box* to create a duplicate of the current box, without its contents.
  - b. *Create Blank* to create a new box submission form.
4. After all boxes have been added, select:
- a. *Save All & Finish Later* to save the batch without submitting so the user can finish it later.
  - b. *Submit Boxes* to submit the batch for approval and pickup by Records Management.
  - c. *Cancel* to delete the current batch, or any changes made if it was previously saved.

**Box1** a

Optional: Your personal box identifier.

**Start date** b m/d/yyyy 

Earliest date of records.

**End date** c m/d/yyyy 

Latest date of records.

**Description** d

Brief Description of Contents (50 character limit)

**Function**  e

Select the most accurate function for these records

**Retention** f

Number of years these records will be retained.

0

**Contents** g

List all contents of box in as much detail as possible.

**Record Type** h

Permanent	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Historical	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Highly confidential	<input type="radio"/> Yes	<input checked="" type="radio"/> No

3a & b

4a, b, & c

**Call or email URIM for help with this app.**

**2-2828 or [urim@byu.edu](mailto:urim@byu.edu)**

## Glossary

Term	Definition
eRTS	Electronic Records Transfer Sheet
Records Transfer Sheet	Information submitted to Records Management about a box being sent to the Records Center, detailing what's inside and how long it should be kept for.
Record	A record is any piece of business information that is required by law to be retained for a specific period of time or that should be retained for as long as it has business value to the organization.
Box	A physical box with records inside of it. Boxes are provided and maintained by Records Management for the purpose of storing records.
Box (Electronic Records Center)	A cloud-based storage system online (box.byu.edu) used by the University to store information and records. For more information, please visit our website.
Batch	A box or set of boxes being submitted to Records Management to be retained.
Retention	The period of time that records will be kept, or <i>retained</i> .
DRS	Department Retention Schedule. Based off of the General Retention Schedule for the University, a DRS is a list of records your department needs to manage.
Function	What kind of records are in the box
Category	Of the kind of records in the box what are they specifically
Permanent	Records with this classification should not be destroyed.
Historical	Records with this classification should eventually end up in the University Archives
Highly Confidential	Records with this classification should not end up in the University Archives.
Active Box/Records	These are boxes currently being stored at the University Records Center and used by Departments.
Inactive Box/Records	Boxes that have been PCO'd, Destroyed, or Archived.
PCO	Stands for "Permanently Checked Out" these boxes were previously submitted by a department and then checked back out permanently by the department. These boxes are no longer kept track of by URIM.
Destroyed	These boxes have met their retention and were destroyed per the University General Retention Schedule.
Archived	These boxes were determined to have historical value by the University Archivist and were transferred to the University Archives under the direction of the department and the Archivist.