

## Guidance for using the Records Management Service software

The software can be used to undertake the following tasks:-

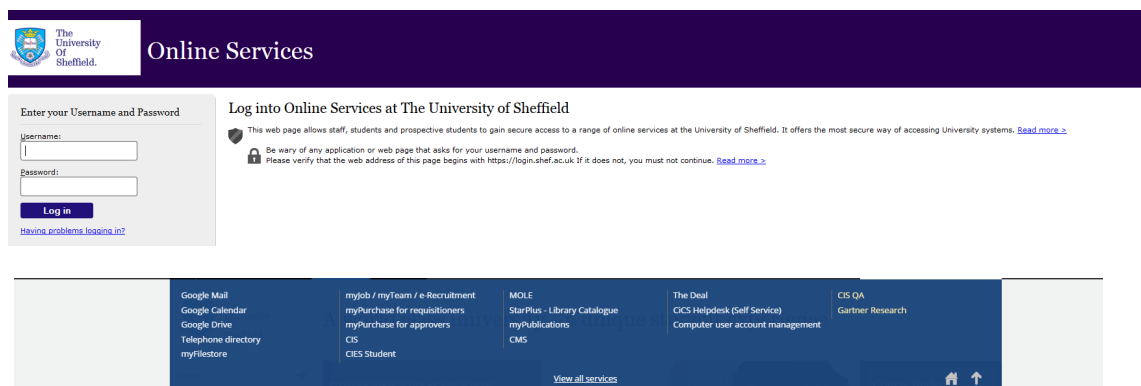
1. Sending information about the boxes to be transferred to the Records Centre.
2. Retrieving boxes or files from the Record Centre.
3. Viewing all of the boxes that you have stored or that have been disposed of within the Records Centre.

### Logging in to the system

You need to be assigned and logged in to the system by the Records Management Service in order to use it.

To log in for the first time you will need to be assigned to a department. You can use any popular browser – Firefox, Chrome, IE, Safari. The URL is <https://paper-records.shef.ac.uk>

Log in to MUSE using your Username and Password

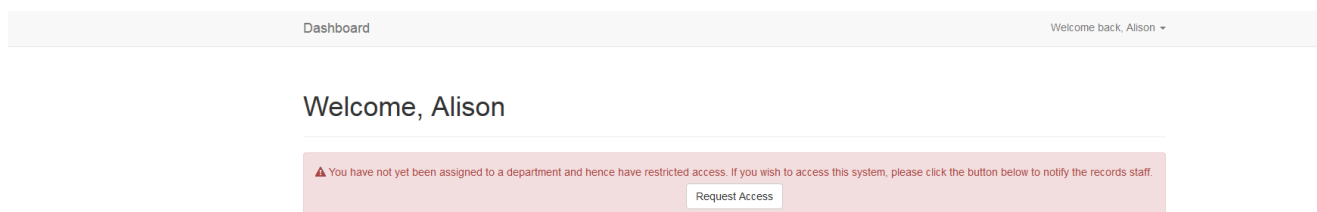


Under 'View all services' click on 'Paper Records'

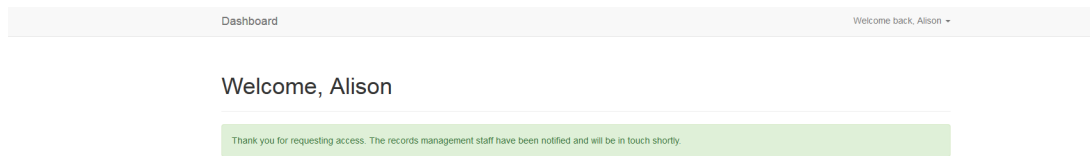


Click on **Paper Records** link in MUSE

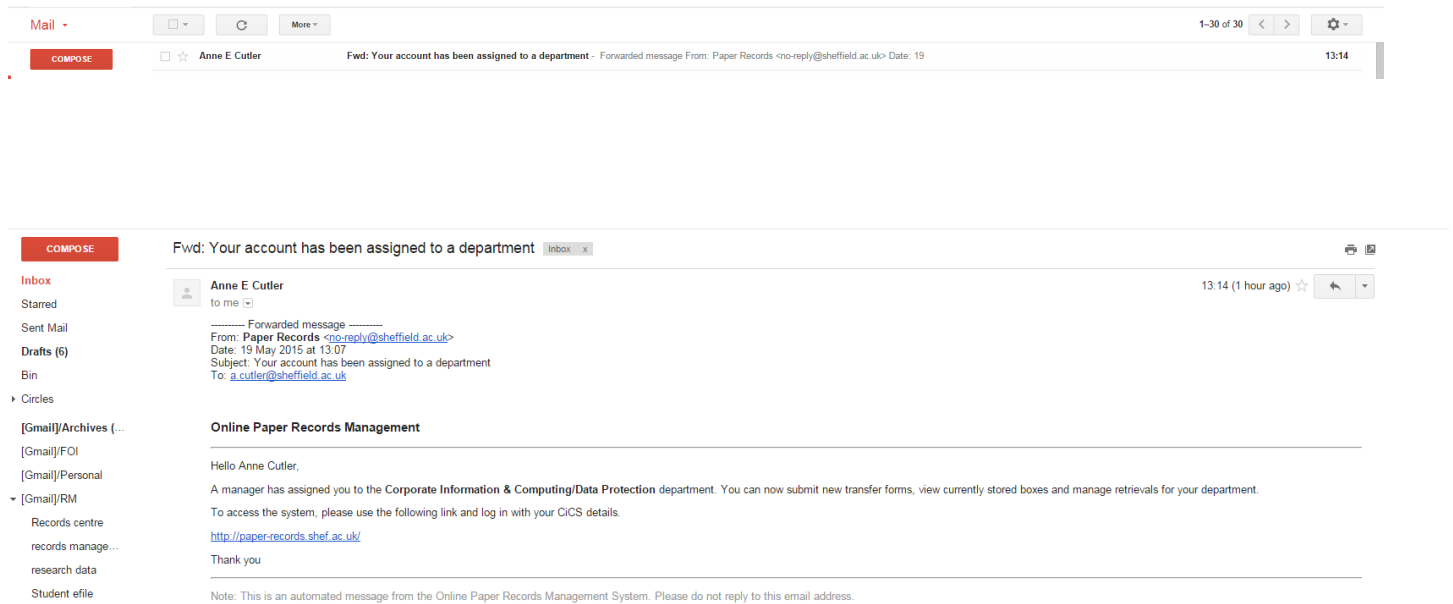
When you have done this you will receive the following notification that asks you to Request Access. You need to do this in order to inform the Records Management Service.



When you have requested access the Records Management Service can assign you to your department.



When you have been assigned a department you will be sent an email



If you click the URL in the email you will then be taken to the Dashboard for the system.

## Dashboard

When you have signed in to the system using your username and password you will be on your departmental landing page, showing you your Dashboard. The Dashboard allows you to view any activity or holdings relating to your boxes. It also allows you to undertake actions.

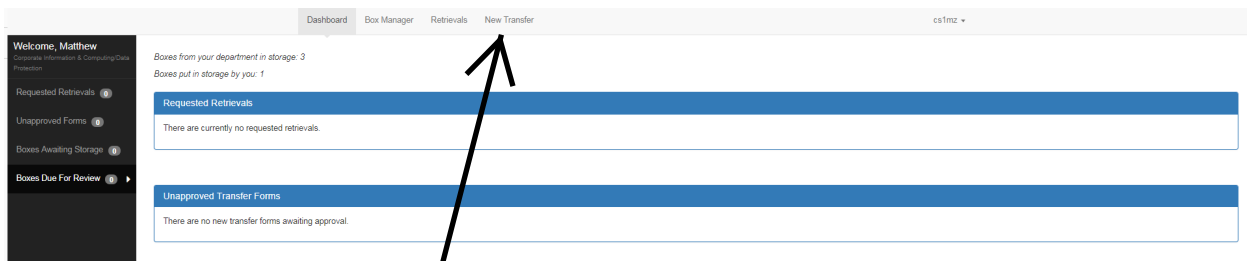
The screenshot displays a web dashboard interface. At the top, there is a navigation bar with tabs for 'Dashboard', 'Box Manager', 'Retrievals', and 'New Transfer', along with a user profile 'cs1mz'. A sidebar on the left contains a 'Welcome, Matthew' message and a menu with items: 'Requested Retrievals', 'Unapproved Forms', 'Boxes Awaiting Storage', and 'Boxes Due For Review'. The main content area features four panels, each with a blue header and a white body containing a status message:

- Requested Retrievals:** Boxes from your department in storage: 3  
Boxes put in storage by you: 1  
There are currently no requested retrievals.
- Unapproved Transfer Forms:** There are no new transfer forms awaiting approval.
- Boxes Awaiting Storage:** There are no boxes that need to be assigned a storage location.
- Boxes Due For Review:** There are no expired boxes up for review at this time.

At the bottom of the page, a copyright notice reads '© 2018 epigenesis'.

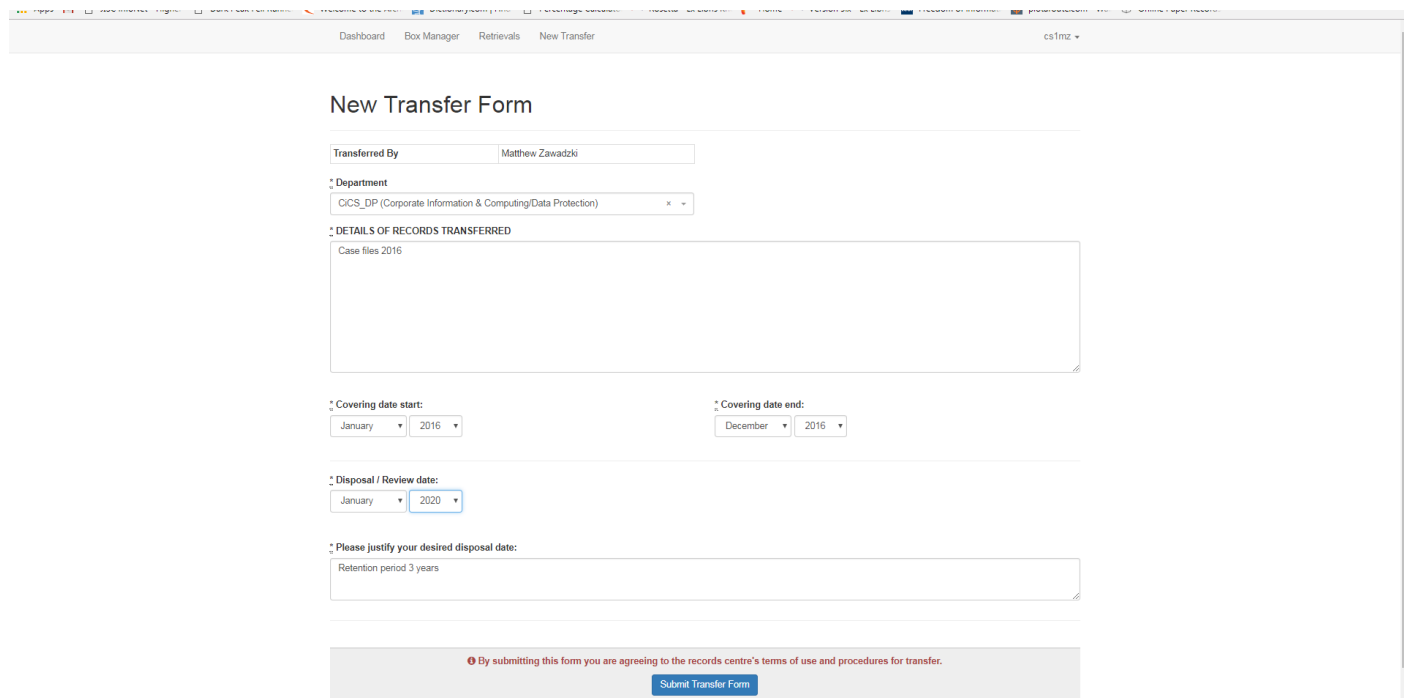
The Dashboard is your view of your boxes. It allows you to undertake new transfers, request retrievals and view the status of your boxes

## Transfer data about new boxes

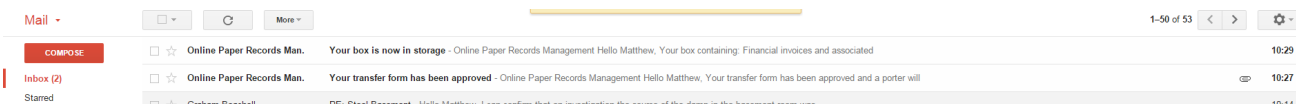


Click on **New Transfer** to set up a new transfer form for a box

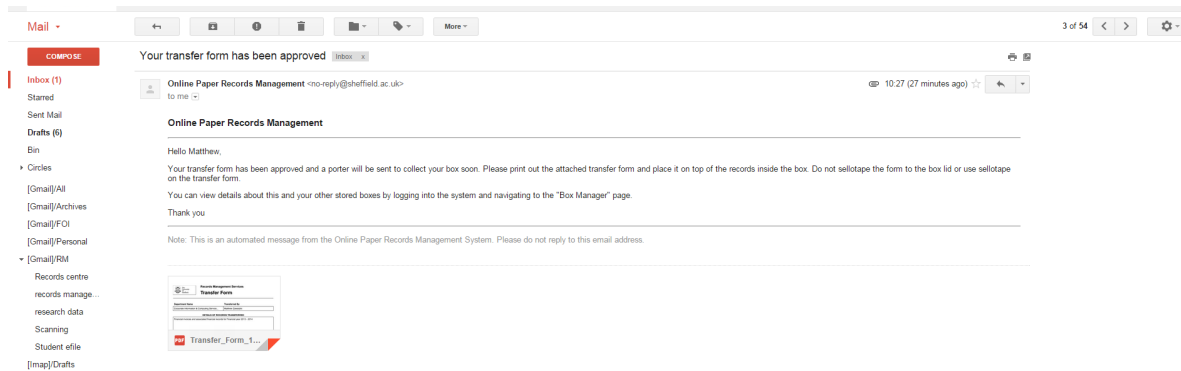
Enter the data on to the Transfer Form. When you have completed the data entry click on 'Submit Transfer Form' to send it to the Records Management Service. Please note once you have submitted the transfer form you cannot edit the data, so please ensure accuracy. You can now continue to complete another Transfer Form, navigate to another function on the dashboard or close down the browser. Note that some of the data remains in place, which enables faster data entry for boxes of material of a similar type / date. **Note:** All fields must be completed



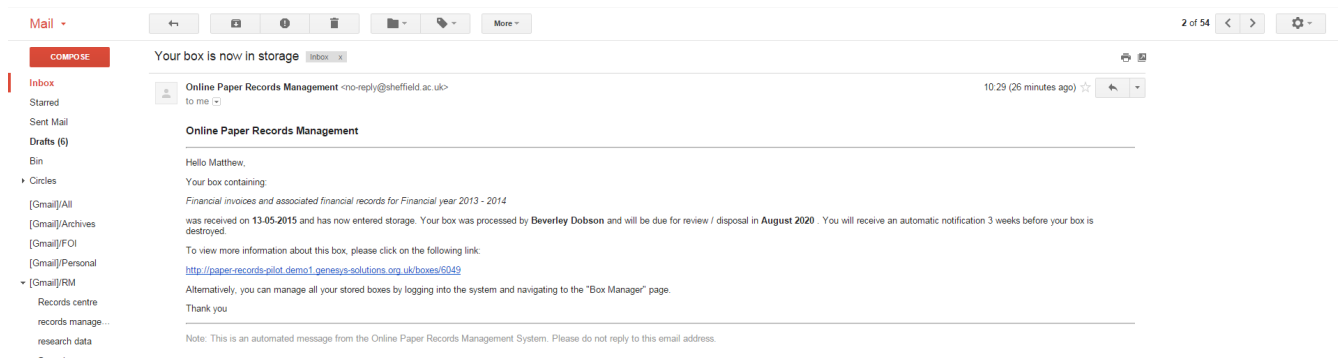
When you have submitted your Transfer Form to the Records Centre you will receive two emails.



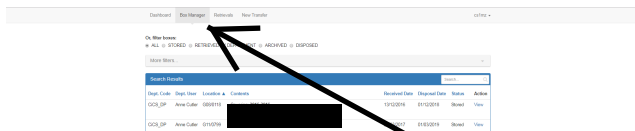
The first email will return to you a PDF of your Transfer Form that you will need to print out and place in the box to which it relates.



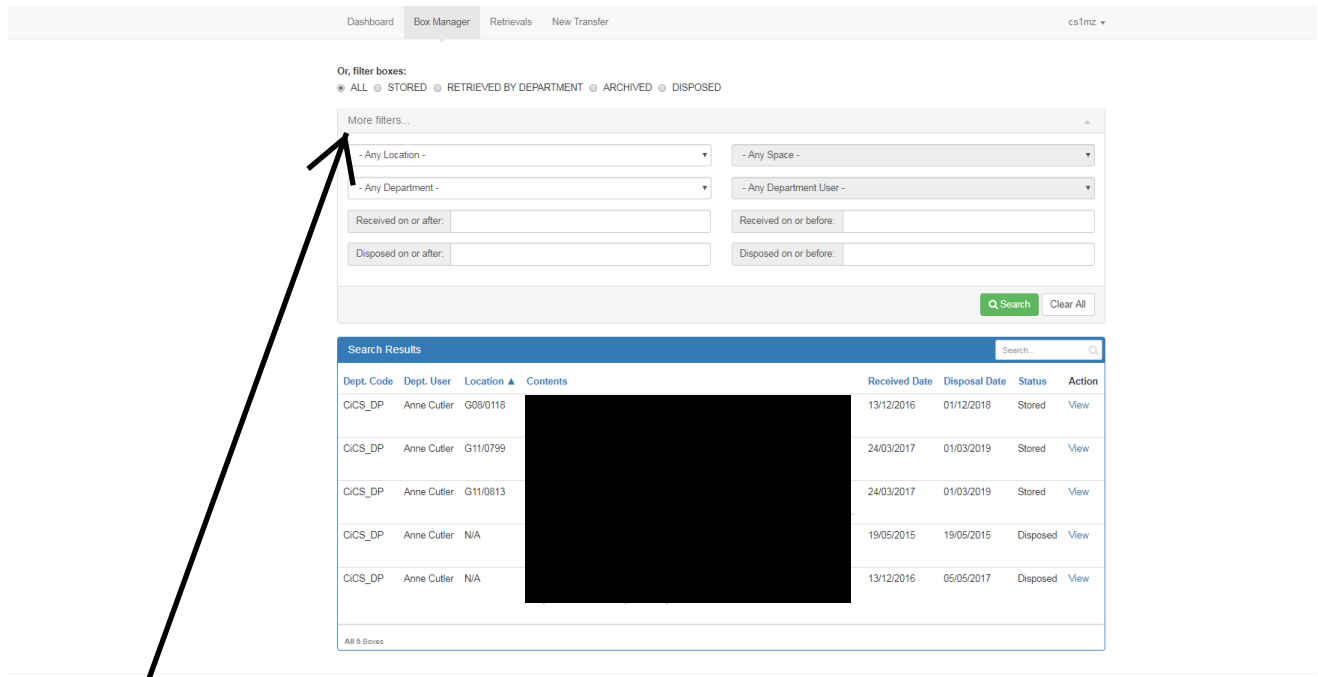
The second email will be sent once the box has been collected and assigned a space in the Records Centre and will let you know how long it is being retained for and when you will receive a notification regarding its disposal.



## Box Manager



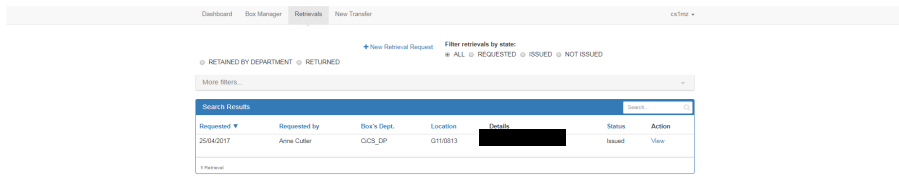
Click on **Box Manager** to get a view of all the boxes held in the Records Centre by your department as well as other statuses



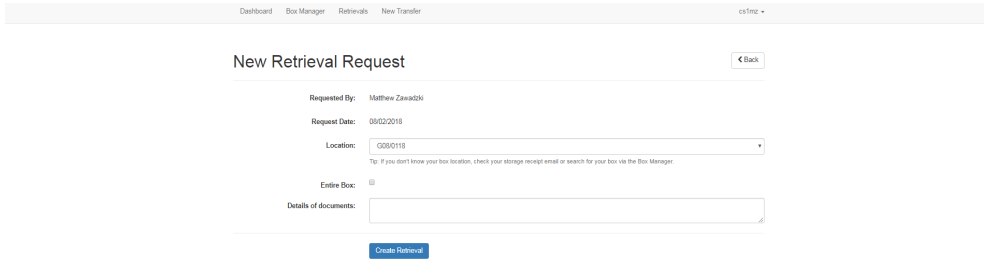
Filter boxes allow you to adapt searches

An 'open search' will allow you to return all boxes held by your department that have been assigned a storage space, and by using other fields you can narrow searches to find boxes that cover particular dates. There is also the facility to undertake specific free text searching for information about the boxes by using the 'search' box.

# Retrieval Manager



Clicking on **Retrievals** will open the Retrieval Manager and allow you to send a request for a box or a file. Click on **New Retrieval Request** to start a request for a box or file



Choose a box number from the **Location**, and provide details of the file required, or request the entire box by checking the box. Once you are happy with the request, click **Create Retrieval**.

When you press **Create Retrieval** you will see a message stating that the retrieval was successfully created.

The request will then be actioned by the Records Management staff. If rejected / not issued Records Management staff will contact you.

You will also be able to see a list of all retrievals, and their status, within the Retrievals page / more filters

Please email [records@sheffield.ac.uk](mailto:records@sheffield.ac.uk) / ring 23205 to return retrieved items as this cannot be organised on the system.

## DISPOSALS

You will receive an email listing boxes to be disposed, 3 weeks before the due date. On the first of the month box details will appear in the **Boxes due for Review** section on the Dashboard.