

— **RIMS** —
 (Records & Information Management System)

Quick Guide for Users

The screenshot shows the RIMS Home Page Grid with search results for 'park' and 'cult'. The interface includes a top level menu, item type tabs, a quick search area, action buttons, and a home page grid. A red box highlights the search results table.

Department	Division	Section	Subsection	AR1 #	Title	Years	Contents	Box Number	Date From	Date Thru	Destruction Date	Box Barcode	Current Location
<input type="checkbox"/> Parks&Cult Resources	Cultural Resource	Admin	06-020	Quarterly Reports	4	Quarterly Reports Bx 1	1	9/1/1995	2/28/2004	7/1/2008	0000082271	6746 - 6746 - 0000011095	
<input type="checkbox"/> Parks&Cult Resources	Cultural Resource	Admin	02-047	Cultural Resources Correspondence	5	Cult Res Div Correspondence Bx 1	1	1/1/1999	12/31/2003	1/1/2009	0000082312	6763 - 6763 - 0000011112	
<input type="checkbox"/> Parks&Cult Resources	Cultural Resource	Admin	94-505	Budgets, Supplemental Budgets and related records including correspondence.	3	SPCR Annual Budget Rpts Bx 3	3	1/1/2002	12/31/2004	12/31/2007	0000082550	6763 - 6763 - 0000011112	
<input type="checkbox"/> Parks&Cult Resources	Cultural Resource	Admin	93-036	Subject Files	5	Archives Files & Cult Trust Bx 1 Eval	1	1/1/1998	12/19/2003	1/1/2009	0000084179	7112 - 7112 - 0000011461	
<input type="checkbox"/> Parks&Cult Resources	Cultural Resource	Admin	93-036	Subject Files	5	Arts Council Misc Bx 2 Eval	2	1/1/1998	12/19/2003	1/1/2009	0000084181	7112 - 7112 - 0000011461	

Sort results by clicking on any column header (Dept., Div., Sec., etc.). Click again to reverse sort.

A RIMS Home screen – listing search results in the Home Page Grid on the “Boxes” tab. Other tabs display their own Home Page Grid and search results.

These are your main tools for navigating and using RIMS

- ▶ **Top Level Menu** – provides access to the various indicated functions
- ▶ **Item Type Tabs** – to search for various items (Boxes, Records, Retention Schedules)
- ▶ **Quick Search Area** – used to enter search criteria for an item type
- ▶ **Action Buttons** – execute specific actions: Request, Transfer, New, etc.
- ▶ **Home Page Grid** – displays queried results in a list that can be sorted by any column

Finding *Any* Items (e.g. Boxes, Records, Places, Schedules)

To Find Items:

- 1) Click the desired **Item Type Tab** – Boxes, Records or Files, Retention Schedules, etc.
- 2) Choose the field(s) in the Quick Search Area you wish to search.
- 3) Enter appropriate search criteria in any one or more of the search fields.
- 4) Click the **Go** Button (far right) or press **<Enter>**.
- 5) Results will be displayed in the Home Page Grid.

Note: If search returns **no** items, too many items, or incorrect items, modify search criteria. Check spelling, simplify search, try fewer or different field(s). Click the **Clear** Button to start a fresh search.

Requesting Boxes from the State Records Center

To Request a Box:

- 1) Click on the **Boxes** tab. Quick-Search to find the desired boxes. See steps 2 – 5 above.
- 2) Click the far-left checkbox next to each desired item. Limit: 9 boxes.
- 3) Click the **Request** Action Button.
- 4) If your name and barcode don't appear as the destination, click the **Search** Button. On the **Users** tab search for and select yourself (click in the far-left circle), then click **OK**.
- 5) If the destination is correct, simply click **Request** to submit the request.

Note: **Faster search** – If you know which Box you want, simply enter the Box Barcode and click **Go**.

Requesting Records or Files from a Box

To Request Records or Files:

- *) FIRST** search for the file using the **Records or Files** Tab. *It may already be in RIMS!*
- If so, simply Request the records or files from your search results. **Otherwise...**
- 1) Working on the **Boxes** Tab,
 - Find the box containing the record.
 - Put a checkmark in the checkbox at the far left (only one box can be selected).
 - Click the **Request** Action Button.
 - 2) On the "Request Items" screen, note:
 - Immediately below the box information, between two horizontal lines...
 - "Enter Number of Records or Files," followed by a small, empty field and a button labeled **Enter Info**.
 - 3) Type in the field the actual number of files or folders you want (1, 2, 3 – be reasonable):
 - Click the **Enter Info** Button.
 - A small table appears in the lower left part of the screen (below the **Request & Cancel** Buttons). The table header is "Enter Folder Information" and the column headers are generic: "ID" and "Name."
 - Enter whatever identifying information will help the researcher locate each record or file, e.g. *Permit #, Case #, any type of Name* — however you label your folders.
 - "Enter Reason for the Request:" — although optional, this field can be quite useful for your own notes or comments about the request. You'll get a copy with the delivery.
 - 4) Click **Request**. You should get a message that your request was successfully submitted.

Creating New Boxes

To Create a New Box: *(Steps are similar for new Users and Places, except on different tabs)*

- 1) Click the **Boxes** Tab, then click the **New** Action Button.
- 2) Enter Box Number, date range, and Contents. An AR1# is required. Select it from the list.
Tip: Create unique Box Numbers to fit your requirements. Do not exceed 14 characters and spaces.
- 3) Click the **Save & Close** Button to return to the Home Page grid or click the **Save & New** Button to continue creating a series of similar items.
- 4) Box labels are automatically generated and sent to the Label Queues.

Note: Rolled plans (construction drawings, maps) are tracked like boxes. Plan # = Box # (Click the "Rolled Plan" checkbox).

Important: Do **not** click Save & View, *then* Save & Close – a duplicate box will be created!

Creating New Records or Files to Put in Boxes (*Optional*)

To Create a Brand New Record or File: *(Tip – Create a new box first! See steps 1-3 above)*

- 1) Click on the **Records or Files** Tab — then click the **New** Action Button.
- 2) Enter the desired information and choose applicable drop-down values.
(Note: "Land" information applies to agencies which use legal land descriptions.)
- 3) Click **Save & Close** *or* **Save & New** to continue creating a series of similar records.
- 4) **Transfer** new records or files to the **new** box, **not** to a pickup place.

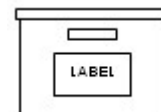
Transferring or Returning Items to the State Records Center

To Transfer New Boxes, Old Boxes, Old Records/Files to a Pickup Place:

- 1) Click the Boxes or Records/Files Tab. Quick-Search the items you wish to transfer.
 - 2) Click the checkbox next to item(s) to be transferred. Click the **Transfer** Action Button.
 - 3) See ***)Time-Saver**, or... click **Search**. Search & select a pickup Place from the **Places** Tab list. This is where you want the boxes or files to be picked up. Click **OK**.
 - 4) Click the **Transfer** Button on the Transfer page.
 - *) Time-Saver:** Transfer pickups to a Place **Barcode**. First search the **Places** tab, click on Place Description, find the Place Barcode near the bottom and write it down (include zeros) or save in Notepad, then you don't have to Search for it every time you Transfer items to your regular pickup Place. Just type or copy/paste it into the Destination field.
- **Important note for Field Offices bringing new boxes to Cheyenne:** First transfer boxes to Destination Barcode: 0000118093 (include leading zeros).

Printing Labels

(Boxes: Avery 5168, Files: Avery 5160)



To Print Labels:

- 1) Click Manage Label Queues in the Top Level Menu.
- 2) Select a label queue to view – Archive Boxes, Records/Files, or Rolled Plans.
- 3) In the display grid, select the labels you want to print by clicking the checkboxes.
- 4) Click the **Print Selected** Button **or** click **Print All** if applicable.
- 5) Close the Adobe Reader® preview window – click the X in the upper right corner.
- 6) If labels printed correctly, *please* **Delete** Printed Labels From Queue.

Reprinting Individual Labels

To Reprint Labels:

- 1) Select the **Boxes** or **Records or Files** Tab. Quick-Search for desired items.
- 2) Click the checkbox next to all items for which you wish to print labels.
- 3) Click the **Labels** Action Button. Verify or change the label Design and Starting Position.
- 4) Click **Print** to print labels immediately (recommended). When finished...
- 5) Close the Adobe Reader® preview window – click the X in the upper right corner.

Printing Search Results

Every tab has a handy option located between the Action Buttons and Home Page Grid:

 Click here for a **Printable Version** of your current search

- 1) First sort your search results if desired — by any column.
- 2) Click [Printable Version](#). A new, separate Report window opens. Adjust your printer settings for Landscape (optional), then click [Send To Printer](#) at the top of the Report.
- 3) With this feature you can print your own customized Retention Schedule Listings, lists of what's checked out (and to whom!), Boxes, Records/Files, Users and pickup Places.

Updating Items (e.g. Boxes, Records/Files, Users, Places)

To Update an Item:

- 1) Click the desired Item Type Tab. Quick-Search for the Box, User, etc. to update.
- 2) Click the checkbox next to the item you wish to update.
- 3) Click the **Update** Action Button.
- 4) Make desired changes on the Update screen.
- 5) Click the **Update** Button when finished.

Note: "Update" is also available when "Viewing" any Box, Record or File, User, or Place.

Tips and Reminders

- **!** When printing labels, make sure the Adobe Reader "Page Handling/Scaling" option is set to **None**
- Every Quick Search section displays what criteria you used. Look for "**Current Search: Find all...**"
- Remember: **Users** are for deliveries of requested boxes/files; **Places** are for **P**ickups – new or returns.
- **New Box tip:** *First* search for the desired **Retention Schedule**, View, scroll down, click [Create a New Box \(or Record or File\) for this Retention Schedule](#). You also can [Query items on the Home Page](#).
- Use the **Search** Action Button, scroll down, refine searches by various Dates, User, Location Barcode...
- Click the **Clear** Button (next to **Go**) to start a fresh search on any tab.
- Do **NOT** use your browser's "Back" button – instead use RIMS' [Home](#) link, Close or Cancel Buttons.
- You can set the Starting position for labels in [Manage Label Queues](#) **or** when reprinting labels.
- Problems viewing labels? Uninstall any/all browser toolbars such as Yahoo!® or Google™ using Microsoft Windows® Start -> Control Panel -> Remove Programs feature. Check for and close Adobe Reader's® 'auto' update if it is running in the background. Disable Windows® Internet Explorer's® popup blocking.
- To *securely* end your RIMS session, completely close the browser window.