SEARCHING FOR RECORDS - ADVANCED

Searching is a powerful tool in CRMS. Once you learn how to set up the searches, you will find that working with a smaller set of records rather than the whole database, increases the speed of your tasks, and enables you to see only the records you want.

There are a number of special symbols you may need to perform your searches, but the most important key to effective searching is determining what criteria are common to all the records you want, and yet different from the rest of the records in the database

Quick Reference – Search Symbols

SYMBOL		EXAMPLE (VALUE FOR PRIMARY FIELD)
%	Wildcard	%100 = all ending with 100 (eg 100, 7100, 13100, etc) 100% = all beginning with 100 (eg 100, 1000, 1006, etc) %100% = all with 100 in them (eg 8100, 81003, etc)
>	Greater Than	Records greater than >100 = 101 to end
<	Less Than	Records less than <6450 = 6449 to 100
:	Range	Records in between 100:199 = 100 to 199
	Blank	Exact match 100 = 100

- When searching the **description field** use the Wildcard Symbol (%) on both ends of the Search Value

Default Search Fields

There are several default fields on the Search Parameters screen. To customize your search, select different search fields using the list of values button (…).

- Keyword
- Org Unit ID
- Primary Number
- Secondary Number
- Series Code
- Series Code Name
- Series Sub Code
- Series Sub Code Name
- Disposition Status
- Active Retention
- Semi Active Retention
- Final Disposition
- Final Disp Date
- Volume Disposition Status
- Enclosure Disposition Status
- Volume Description

Boolean Searches

To make searching faster, you can further refine your search using the Boolean operators

BOOLEAN SEARCHES (AND/NOT)

If you use the AND operator, CRMS will look for entries with BOTH values. If you use the NOT operator, CRMS will exclude entries matching the NOT value.

Example with AND

In the following example, CRMS will search each record to retrieve those that match exactly both sets of criteria and return only records that contain both primary 100 and secondary 20.

OPERATOR	SEARCH FIELD	SEARCH VALUE
AND	PRIMARY NUMBER	100
AND	SECONDARY NUMBER	20

Example with NOT

In the following example, CRMS will search each record to **exclude** all records with secondary 01; then it will further narrow the search to include only those records that exactly match both criteria for primary 100 and final disposition of DE.

OPERATOR	SEARCH FIELD	SEARCH VALUE
AND	PRIMARY NUMBER	100
NOT	SECONDARY NUMBER	01
AND	FINAL DISPOSITION	DE

Example with a RANGE in the value field

The following search will find all primary numbers between 100 and 1050.

OPERATOR	SEARCH FIELD	SEARCH VALUE
AND	PRIMARY NUMBER	100:1050

Example with Search Field duplication

To give yourself multiple selections, any field can be used more than once.
For example the following search will return the same results as the previous search

OPERATOR	SEARCH FIELD	SEARCH VALUE
AND	PRIMARY NUMBER	>99
AND	PRIMARY NUMBER	<1051

***Note**: if the search criteria was >100 and < 1050 the results would not include files with primary 100 or primary 1050.*

BOOLEAN SEARCHES (OR)

If you use an OR operator in combination with AND or NOT, CRMS will expand its search to include files matching criteria on either side of the OR operator . i.e., OR divides the search criteria into 2 separate search groups. Because OR divides the search you often have to repeat search fields.

Example with OR

If you wish to find all records with primary number 100 that were created by User A or by User B. You need to tell the system to perform the following search:

OPERATOR	SEARCH FIELD	SEARCH VALUE
AND	CREATE USER	User A
AND	PRIMARY NUMBER	100
OR	CREATE USER	User B
AND	PRIMARY NUMBER	100

***Note**: the PRIMARY NUMBER field needed to be repeated on both sides of the OR operator to ensure that this field is included in both groups of search criteria.*

If you had omitted the PRIMARY NUMBER after using the OR operator your search results would have been all records created by User A with primary 100 and all records created by User B with any primary.

OPERATOR SUMMARY

OR requires that either criteria be true in each record.

AND requires that both criteria be true in each record.

NOT excludes each record that matches criteria.

Quick Reference – Searching

STEP	ACTION
1.	From the Record Maintenance Screen select **Find**
2.	If you don’t see the Fields you wish to search in, Click on a list of values button (**...**) and select the field
3.	Enter your search criteria as a single value, a range of values, or a partial value using the wildcard (**%**)
4.	Click on the **Find** button

***For more information on searching, consult the User Manual located on the CRMS website* [intranet]**

CHARGE OUT/IN RECORDS

User removes a file volume from its usual volume location and assigns it to a temporary volume location. CRMS documents action and records temporary location until file volume(s) are returned (charged in).

Quick Reference – Charge Out Records

STEP	ACTION
1.	From Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Select **Find** and set search criteria for specific or all files
4.	Click the button to the left of the first record to return to RMF screen
5.	Select **Charge Out**
6.	Select *individual* records or **Select All**
7.	Select a new location from the **Charge Out** list (click on down arrow to right of empty box at the bottom of screen).
8.	Select the **Charge Out** button
9.	Click **OK** in dialogue box
10.	Repeat steps 4 to 7 for charge outs to other locations
11.	Select **Exit** to return to RMF screen

Processes Charge in when files are returned to their usual location. Changes location information in CRMS Volume Screen.

Quick Reference – Charge In Records

STEP	ACTION
1.	From Main Menu, select **Record Maintenance**
2.	At the prompt to have the records ordered, select **Yes** if you want the records to display sorted in numeric order, or select **No** to display in random order
3.	Select **Charge In**
4.	Select *record(s)* for charge in
5.	Select the **Charge In** button at the bottom of the screen
6.	Click **OK** in dialogue box
7.	Select **Exit** to return to the RMF screen

For more information on Charge In/ Charge Out, consult the User Manual located on the CRMS website.

ROLLOVER PROCESSING – CY, FY AND 6M FILES

To rollover a record, you must first set the rollover flag. This can be done individually or you can update multiple files using bulk update. You can then process the records using the rollover processing feature. Rollover does not work for SO files since their close date is set manually by user rather than system calculated.

Quick Reference – Using Bulk Update to Set Rollover Flags

STEP	ACTION
1.	From Record Maintenance, select **Find**
2.	Click on the list of values button (**...**) in an unused row, and select **Rmfile Closed Date**. In **Search Value** type date range (separated by colon) e.g. 2003-01-01:2003-12-31
3.	Click on the list of values button (**...**) in an unused row, and select **Rollover Flag**. In **Search Value** type **N**.
4.	Click on the list of values button (**...**) in an unused row, and select **Active Retention**. In the OPERATOR column on left change the **AND** to a **NOT**. In **Search Value** type **SO**.
5.	Select **Find** then select **Retrieve**
6.	Select **Select All** or select individual files you wish to rollover
7.	Select **Update**
8.	Click in **Rollover Flag** box
9.	Select **Bulk Update**
10.	Select **OK** to confirm, then select **Exit** to return to main menu

Quick Reference – Rollover CY, FY, or 6m Files

STEP	ACTION
1.	From Main Menu, select **Rollover Processing**
2.	Select **Type Of Rollover** from selection menu – **Calendar**, **Fiscal**, or **6M**.
3.	In the **Year** field type the year of the closed date of the file you are rolling over and press the **TAB** key
4.	Select **Find**, then select **Find** again in the next screen
5.	Select **Select All** or select the individual files you wish to rollover
6.	Select **Rollover**
7.	Select **Yes** or **Yes to all** depending on whether you have single or multiple files

For more information on Rollover Processing, consult the User Manual located on the CRMS website.

DISPOSITION PROCESSING – TRANSFER TO STORAGE

In order to store records on-site or off-site the records must be batched together. An eligibility report is then printed and this report is used for pulling files from their file location.

The process in CRMS involves:

- Batch together eligible records
- Print an eligibility report
- Assign an accession number
- Box records
- Print box content lists
- Confirm the collection offsite

Quick Reference – Create a Batch and Print Eligibility Report

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Transfer To Offsite Storage**
3.	Select **End Of Active, In Advance, o**r **Active**
4.	Click on **Find** (use default search criteria unless a more specific search is desired) and **Retrieve**
5.	Select files either by clicking on them individually or click **Select All**
6.	Select **Create Batch** (make a note of the batch #)
7.	Select **Select All**
8.	Select **Print** to preview the Offsite Storage Eligibility List
9.	From the preview screen, select **Print**

Disposition Processing – Transfer to Storage (cont)

Periodically records that show on the eligibility report cannot be located at the time of boxing or are required further.   You may need to remove files from a batch and return them to active status.

Quick Reference – Remove Records From a Batch

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Transfer To Offsite Storage**
3.	Select **End Of Active, In Advance, o**r **Active**
4.	Select **Find** and enter batch # as search criteria (you can refine the search if needed)
5.	Select the *files* you wish to remove (note the list will be in numeric order)
6.	Select **Remove From Batch**
7.	Observe confirmation and confirm **OK**

Perhaps you have additional files you would like to add to an existing batch.

Quick Reference – Add Records to an Existing Batch

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Transfer To Offsite Storage**
3.	Select **End Of Active, In Advance, o**r **Active**
4.	Select **Find** and enter search criteria for the file(s) you wish to add
5.	Select the *files* you wish to add by clicking on their selection box(es)
6.	Select **Add To Batch**
7.	Click **OK** on the warning box, and select the **Batch #** from the dropdown list
8.	Select **OK**

Disposition Processing – Transfer to Storage (cont)

There are two mandatory fields required when assigning an accession number:

- application # - preprinted 6 digit # on form (example: 789654)
- accession # - assigned by MRO Office (example: 91-1234*)*

Quick Reference – Assign an Accession Number

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Transfer To Offsite Storage**
3.	Select **End Of Active, In Advance, o**r **Active**
4.	Select **Find** and enter batch # for search criteria
5.	Select **Select All**
6.	Select **Get Accession Number**
7.	Enter **Application #** and **Accession #** in applicable fields
8.	Select **OK**

Once all the records have been boxed in accordance with the order prescribed in the eligibility list you must confirm in which box each of the files now exist.

Quick Reference – Boxing Records

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Transfer To Offsite Storage**
3.	Select **End Of Active, In Advance, o**r **Active**
4.	Select **Find** and enter Batch # and Accession # for search criteria
5.	Select *individual files* that are contained in a box
6.	Select **Confirm Boxed**
7.	Enter **Box # (Box 1 for first box, 2 etc.)**
8.	If additional information is desired, select **Box Info** and enter details
9.	Select **OK**
10.	Repeat steps 5 through 9 until all records are boxed

Disposition Processing – Transfer to Storage (cont)

Once all the records have been confirmed boxed you are ready to print box content lists to attach to the applications in preparation for obtaining approval signatures.

Quick Reference – Printing Box Content Lists

STEP	ACTION
1.	From Main Menu, select **Reports**
2.	Select **Box Content Lists**
3.	Select **Accession** # using the list of values button (**...**)
4.	Select the **Box #** , or leave **%** to print all boxes in the batch
5.	Select **Run Report**
6.	Select **Report Status Screen**
7.	Select the completed report and click **View Report** (If the report status is not *completed*, wait a minute and click on the **Update Status** button)
8.	Select **Print** from the preview screen

When the application is signed by MRO Office arrangements will be made to pick up boxes from your office. After the boxes have been physically removed to storage it is necessary to confirm this action in CRMS. This will update the status of the record to show Offsite.

NOTE – *It is important to **wait until the boxes leave the office** before doing this task, as it is possible that the MRO will request changes to the application. This is best done prior to confirming the collection offsite.*

Quick Reference – Confirm Offsite

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Transfer To Offsite Storage**
3.	Select **End Of Active, In Advance,** or **Active**
4.	Select **Find** and enter Batch # and Accession # for search criteria
5.	Select **Select All**
6.	Select **Confirm Offsite**
7.	Select **OK**

For more information on Disposition Processing, consult the User Manual located on the CRMS website

DISPOSITION PROCESSING – DESTRUCTION OF RECORDS

In order to prepare records for disposal you must first find out what is eligible and then batch (or collect) these together in CRMS. An eligibility report is then printed and this report is used for pulling files from their file location.

Quick Reference – Create a Batch and Print Eligibility Report

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Destruction Of Records**
3.	Click on **Find** (use default search criteria unless a more specific search is desired) and **Retrieve**
4.	Select files either by clicking on them individually or click **Select All**
5.	Select **Create Batch** (make a note of the batch #)
6.	Select **Select All**
7.	Select **Print** to preview Destruction Eligibility List (use list to pull files)
8.	From the preview screen, select **Print**

Disposition Processing – Destruction of Records (cont)

Periodically records that show on the eligibility report cannot be located at the time of boxing or are required further. You may need to remove files from a batch and return them to active status.

Quick Reference – Remove Records From a Batch

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Destruction Of Records**
3.	Select **Find** and enter batch # as search criteria (you can refine the search if needed)
4.	Select the *files* you wish to remove (note the list will be in numeric order)
5.	Select **Remove From Batch**
6.	Observe confirmation and confirm **OK**

- Perhaps you have additional files you would like to add to an existing batch.

Quick Reference – Add Records to an Existing Batch

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Destruction Of Records**
3.	Select **Find** and enter search criteria for the file(s) you wish to add
4.	Select the *files* you wish to add by clicking on their selection box(es)
5.	Select **Add To Batch**
6.	Select *Batch* # from list**--** confirm **OK**

Disposition Processing – Destruction of Records (cont)

Quick Reference – Assign a Destruction Number

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Destruction Of Records**
3.	Select **Find** and enter batch # for search criteria
4.	Select **Select All**
5.	Select **Get Destruction Number**
6.	Enter **Destruction #** provided by MRO Office
7.	Select **OK**

Once all the records have been boxed or collected together in accordance with the eligibility list you must confirm in which box each of the files now exist.

Quick Reference – Boxing Records

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Destruction Of Records**
3.	Select **Find** and enter **Destruction #** for search criteria
4.	Select *individual files* that are contained in a box
5.	Select **Confirm Boxed**
6.	Enter **Box # (Box 1 for first box, 2 etc.)**
7.	If additional information is desired, select **Box Info** and enter details
8.	Select **OK**
9.	Repeat steps 4 through 8 until all records are boxed

Disposition Processing – Destruction of Records (cont)

Once all the records have been confirmed boxed you are ready to print box content lists to attach to the applications in preparation for obtaining approval signatures.

Quick Reference – Printing Box Content Lists

STEP	ACTION
9.	From Main Menu, select **Reports**
10.	Select **Box Content Lists**
11.	Select **Destruction** # using the list of values button (**...**)
12.	Select the **Box #** , or leave **%** to print all boxes in the batch
13.	Select **Run Report**
14.	Select **Report Status Screen**
15.	Select the completed report and click **View Report** (If the report status is not *completed*, wait a minute and click on the **Update Status** button)
16.	Select **Print** from the preview screen

When the application is signed by MRO Office destruction can be carried out. After the boxes have been physically destroyed it is necessary to confirm this action in CRMS. This will update the status of the record to show destroyed.

NOTE – *This* ***must not be done*** *until MRO has provided approval and the physical records have been disposed*

Quick Reference – Confirm Destroyed

STEP	ACTION
1.	From Main Menu, select **Disposition Processing**
2.	Select **Destruction Of Records**
3.	Select **Find** and enter Batch # and Accession # for search criteria
4.	Select **Select All**
5.	Select **Confirm Destroy**
6.	Enter **Destruction Date** and any required notes related to methodology used
7.	Select **OK**
8.	Observe confirmation that status has been updated, select **OK**

For more information on Disposition Processing, consult the User Manual located on the CRMS website

REPORTS -

This is a list of reports available from the Reports menu.

- **Box Description List** – lists the accession number, box number, box note, date boxed, and final disposition
- **Box Content List** – lists boxed records, including classification and description – by accession and box number
- **Outstanding Destruction Batches** – lists the org unit with outstanding destruction batches
- **Outstanding Off-Site Disposition Batches** – lists the organization units with outstanding off-site disposition batches
- **Disposition Batch List** – lists the destruction batch and its final disposition date, org unit, schedule, and classification information
- **Volume Location** – lists the location of all volumes by org unit and includes file name, date opened, volume number, file location, and charge out information
- **Secondary OPR/NOPR Designation** – lists the secondaries that are locked for a specific Org Unit
- **Retention Changes**
    - **Updates in Retention Schedule** – lists records sorted by Org Unit, that would be impacted by changes to the Retention Schedule
    - **Batch Conflict Report** – lists batches that will be impacted by changes to the Retention Schedule
    - **Invalid Volume Report** – lists volumes that will be impacted by changes to the Retention Schedule
- **Condensed File List** – gives a condensed listing of files that match your search criteria
- **Standard File List** – lists files that match your search criteria

Note – the file lists can also be accessed from within Record Maintenance. See Level I Handout for instructions on this.

PRINTING REPORTS

In addition to printing reports on the fly, you can choose to schedule reports to run on a daily, weekly or monthly basis, and have the reports emailed to you.

Quick Reference – REPORTS

STEP	ACTION
1.	From the Main Menu, select ***Reports***
2.	Select desired *Report*
3.	If necessary set criteria for your report
4.	Select **Run Report**
5.	Select **Report Status Screen**
6.	Select the completed report and click **View Report** (If the report status is not *completed*, wait a minute and click on the **Update Status** button)
7.	Select **Print** from the preview screen

For more information on Reports, consult the User Manual located on the CRMS website