



University Records Management Records Inventory System Step-by-Step Guide

UNIVERSITY RECORDS MANAGEMENT TRAINING

RECORDS INVENTORY SYSTEM



As a State university, we are considered an agency under T.C.A. 10-7-301(1) and are required to follow public record laws and rules established by the Public Records Commission.

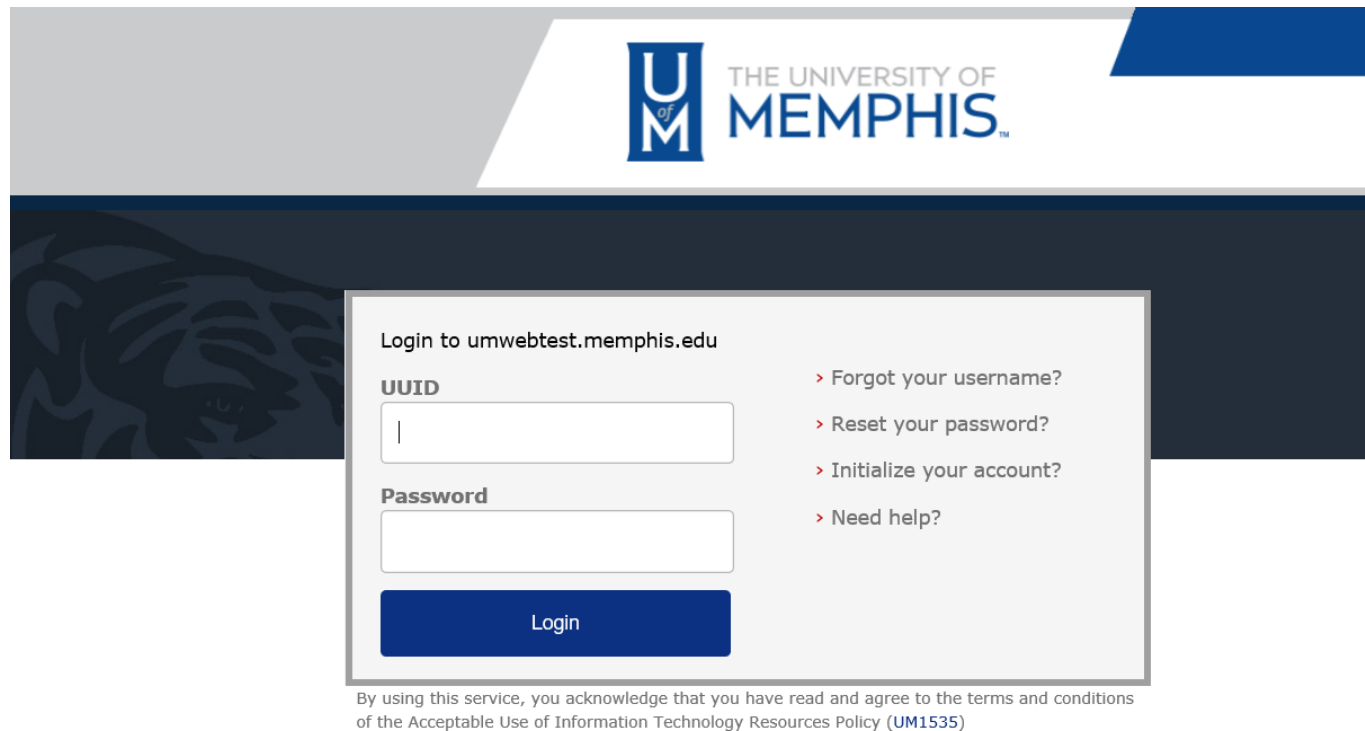
The State requires each agency to annually submit a records holding report. In order to submit accurate information, University of Memphis' faculty and staff are asked to submit an inventory of the records in their possession.



UNIVERSITY RECORDS MANAGEMENT TRAINING

RECORDS INVENTORY SYSTEM

[Log-in](#) to access the system.



U THE UNIVERSITY OF
M MEMPHIS™

Login to umwebtest.memphis.edu

UUID

Password

Login

- > Forgot your username?
- > Reset your password?
- > Initialize your account?
- > Need help?

By using this service, you acknowledge that you have read and agree to the terms and conditions of the Acceptable Use of Information Technology Resources Policy ([UM1535](#))

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Available options are to “Enter/Edit Records” or “Certify Records”

“Certify Records” function is only required once a year on or by May 31.

UNIVERSITY OF MEMPHIS RECORDS INVENTORY

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Welcome, Ladonnal - [Logout](#)

[Enter/Edit Records](#)

[Certify Records](#)

UNIVERSITY RECORDS MANAGEMENT TRAINING

RECORDS INVENTORY SYSTEM

NAME OF
SUBMITTER: Ladonnal Curry

DIVISION/DEPARTMENT: Chief Financial Officer

DATE: 04/07/202

Submit and Add a New Record

View Disposed Records

Clear Form

Disposed Sensitive Dates of Records: From (mo/yr) To (mo/yr)

Physical Location (Room) Record Series Title & No.

Retention Period Vital Record Confidential Active/Inactive Original or Duplicate

Type of Media Volume Unit of Measure

Records Description

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NAME OF
SUBMITTER: Ladonnal Curry

DIVISION/DEPARTMENT: Chief Financial Officer

DATE: 04/07/2022

Submit and Add a New Record

View Disposed Records

Clear Form

For details regarding the fields, hover cursor above the question marks.

- Submit and Add New Record – Select if adding more records.
- View Disposed Records– indicate yes or no. If records are being disposed at the time of entry of the record, respond “yes” in this space.
- Clear Form – Select to remove all information from the form.

UNIVERSITY RECORDS MANAGEMENT TRAINING

RECORDS INVENTORY SYSTEM

NAME OF
SUBMITTER: Ladonnal Curry

DIVISION/DEPARTMENT: Chief Financial Officer

DATE: 04/07/2022

Submit and Add a New Record View Disposed Records Clear Form

Disposed Sensitive Dates of Records: From (mo/yr) To (mo/yr)

For details regarding the fields, hover cursor above the question marks.

- Disposed – indicate yes or no. If records are being disposed at the time of entry of the record, respond “yes” in this space.
 - NOTE: If you have a record series that spans several years and you are only disposing of a particular year, indicate the date of those records disposed. As you will need to maintain the dates of the remaining records in the system until the time of disposal.
- Sensitive – indicate yes or no (ex. SSNs, birthdates, etc.)
- Dates of Records – indicate the month and four-digit year (ex. 08-2021)

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Physical Location (Room) ?

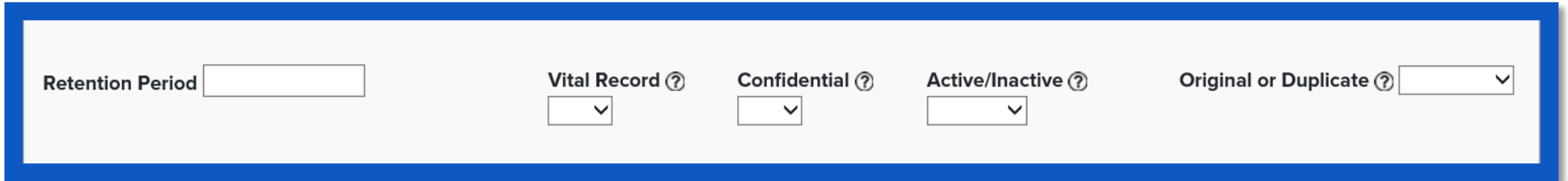
Record Series Title & No. ?

- Physical Location – list the room and room number where the documents are physically stored
- Records Series Title & No. – use the dropdown menu to determine the appropriate series related to your records



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The screenshot shows a search interface with five filters: 'Retention Period' (text input), 'Vital Record' (dropdown), 'Confidential' (dropdown), 'Active/Inactive' (dropdown), and 'Original or Duplicate' (dropdown). Each dropdown menu has a downward arrow icon.

- Retention Period – This field is automatically populated based on the “Record Series Title” selected.
- Vital Record – Indicate if the record is vital. To determine if it is a vital record, ask yourself, “if your office was destroyed by a fire or natural disaster, would this document be needed to restart operations?”
- Confidential – Indicate if the record is confidential.
- Active/Inactive – Indicate active if the record was used within the last 6 – 12 mos. Inactive records are those not used within the past year.
- Original/Duplicate – Indicate if the record is the original document and not one that has been submitted to another internal office or external agency.



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Type of Media   Volume  Unit of Measure 
 

- Type of Media – Indicate if the record is paper, CD, USB, etc.
- Volume –Provide the volume of the media.
- Unit of Measure –Indicate the unit of measure (paper, MB, or GB)



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Records Description ?

- Records Description – Provide description of your records (ex. AY2018 student advising files)



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NAME OF

DIVISION/DEPARTMENT: Chief Financial Officer

DATE: 04/07/2021

SUBMITTER: Ladonnal Curry

You responded with 'I have reviewed and submitted official records' for 2021 on 2021-06-01.

You can change your selection below:

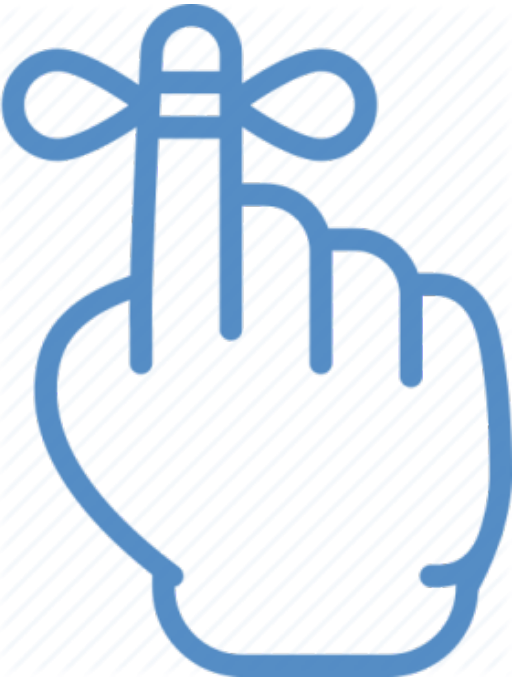
- I have reviewed and submitted my official record documents.
- I have reviewed my documents but do not have any official records.

[Submit](#)

[Return to Main Menu](#)

UNIVERSITY RECORDS MANAGEMENT TRAINING

THINGS TO REMEMBER



- Once all information is entered, click “Submit and Add a New Record” to save the document and/or enter a new record.
- The form can be cleared if needed to start over.
- If changes are needed to the newly created record, make the necessary changes and select “Update the Record” to save the changes. **Please Note: The dates and/or volume are the only updates allowed.**
- If it is determined that the record is not needed or entered in error, select “Delete the Record” to discard those changes. Deleted records cannot be restored. **Do NOT** use the delete button if you are planning and/or have disposed of the record.
- Certify records by May 31. If no official records, please certify records as such.
- “Disposed” should be selected for any record scheduled for and/or destroyed per the State of Tennessee mandate regarding the proper disposal of records.



UNIVERSITY RECORDS MANAGEMENT TRAINING RESOURCES

For additional questions, please see the [Records Management Training](#) website or contact Ladonnal Curry at lcurry@memphis.edu or 901-678-0410.

[Record Retention & Disposition Schedule](#)

University Records Management Training: Register in [Learning Curve](#)

