Records Centre Request System

A User Guide

Records Centre Client Services

Provincial Archives of New Brunswick *(Finance and Treasury Board)*

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Version	Revision Date	Author	Summary of Changes
2	July 7, 2022	Records Centre Services	*Update to Table of Contents *Revision tracker table *Figure 8 Session timed out login
3	Feb. 14, 2023	Records Centre Services	Note page 8: two-year limit on recall of boxes.
	Last updated April 2024	Records Centre Client Services	Unit name

Introduction

The ***Provincial Archives of New Brunswick (PANB)*** is mandated under the *Archives Act* to provide economical storage facilities for public records and to encourage the use of such facilities.

The ***Provincial Archives' Records Centre*** (Records Centre) maintains and administers centralized off-site records storage program for semi-active records in paper form. While these records are stored, they remain under the care, custody, and control of the transferring body.

Purpose of this Publication

The purpose of this document is to provide clients with instructions on how to request records from the Provincial Archives' Records Centre storage using the on-line Records Centre Services System.

Intended Audience

This publication is for Records Managers/record custodians who are responsible for recalling and returning their organization's records from the Provincial Archives' Records Centre.

1. Background

1.1 Records Centre Activities

The Records Centre is an off-site storage facility. It provides secure, low-cost storage for semi-active records and processes retrieval/call back and return requests for files and boxes.

Records stored at the Records Centre remain under the control of the organization that sent them. Only authorized employees of the transferring body may recall their records from the Centre.

2. Records Centre Request System

The *Records Centre Request System* is an on-line system that enables authorized registered users to submit and track their retrieval requests electronically through an intranet site.

2.1 Who can use the system?

Any authorized Records Centre Services' client, including Government employees outside of the GNB Exchange Server, may access this system.

2.2 What can you request?

You can request semi-active records your department has transferred to the Records Centre. Boxes, single files, batches, maps, and plans may be requested.

3. Registered Users

The Records Centre maintains a list of authorized registered users. These names are supplied by departmental Records Managers (or equivalent). If you are already a registered user, you do not need to re-register.

3.1 Becoming a Registered User

If you are not a registered user and you attempt to use the Records Transfer System, an error message will appear advising you to contact your departmental Records Manager. The Records Manager will verify your need to transfer records and ask the Records Centre Request Coordinator to add you as an authorized user.

If you do not know who your departmental Records Manager is, contact the Records Centre Request Coordinator at records.centre@gnb.ca for assistance. If your organization does not have a Records Manager, the manager of your work unit/branch can request that you be added as a system user.

3.2 Departmental Records Managers vs. General Users

Departmental Records Managers and general users have different rights in the Records Centre Request System.

- General users can initiate requests and access their own request history,
- Departmental Records Mangers can search, track, and manage the requests of all authorized users in their department(s).

4. Records Centre Services Login

To access the system:

- For GNB Intranet users: [Records Center Services / Dépôt des documents (gnb.ca)]
- For Extranet users: [Login / Connexion (gnb.ca)]

4.1 Internal Users:

The link will take you to the *Records Centre Services* Login page.
Internal clients do not require a password. Simply click the blue Login button.

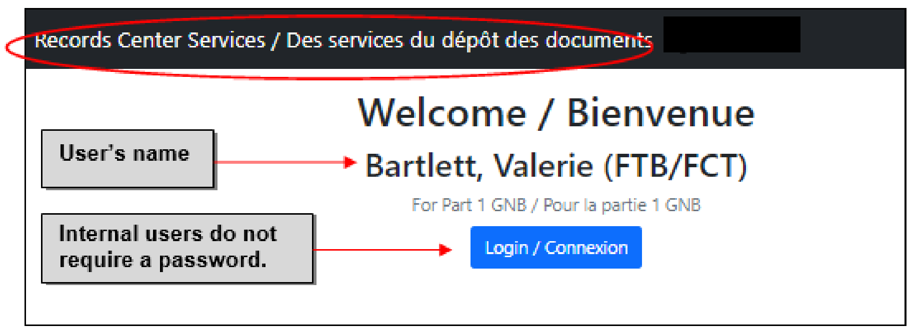


Figure 1 *Records Centre Services* Login for **internal** clients

4.2 External Users:

When your account is first authorized, you will receive an email with a temporary password. You will be prompted to change your password the next time you log in. If you forget your password, you can request a password reset.

The username is your email address.

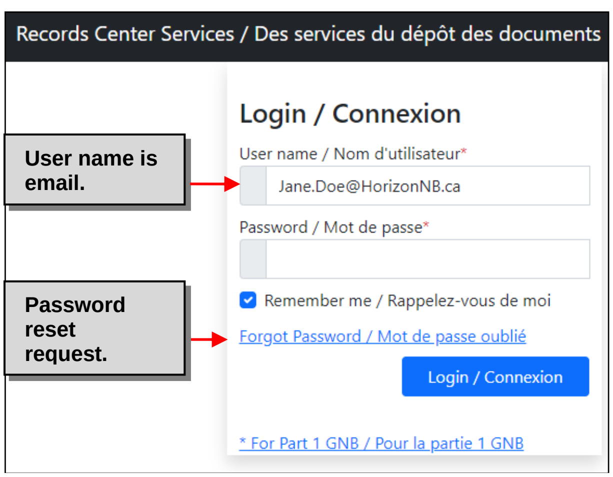


Figure 2 *Records Centre Services* Login for **external** clients

5. Records Centre Services Homepage

After logging in, the system will take you to your personalized Records Centre Services homepage. Your name will be shown on the top right. The dropdown arrow provides links to *My Profile* and this user guide, as well as the log out option.

The homepage provides the following functions:

- **My Requests/My Transfers** – Displays details of your current and past requests and transfers.
- **New Request/New Transfer** – Create new requests and new transfers (top of screen).
- **My Profile** –Manage your contact information, set language preference, and change your password.

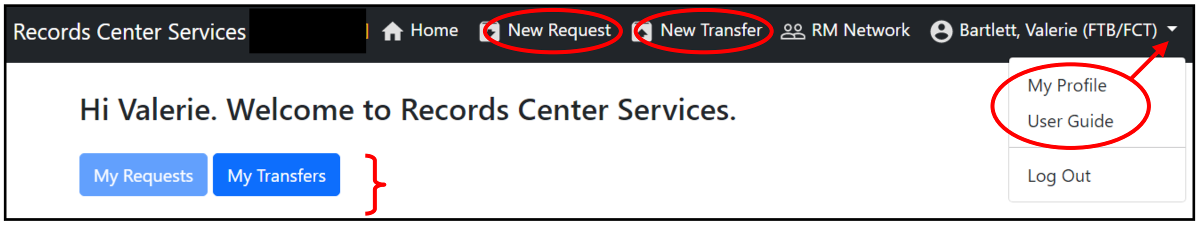


Figure 3 *Records Centre Services* homepage

5.1 My Profile settings

The *My Profile* tab allows you to manage your user information and preferences. Set your default information the first time you log in. This is the information the system defaults to auto-fill those fields each time you begin a new transfer.

On the Homepage, go to *My Profile* in the dropdown list under your name.

From here, set your language preference, change your pasword, and edit your contact information for pickups and deliveries. The system will autofill based on these details each time

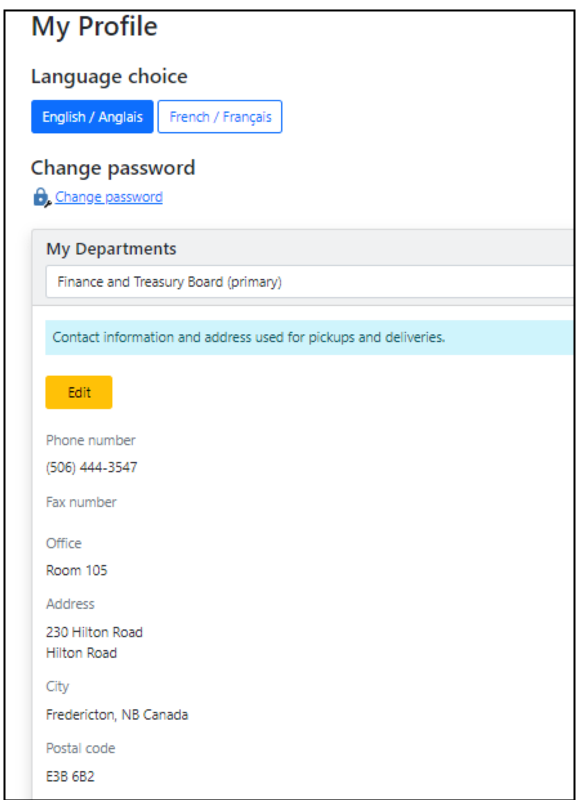


Figure 4 *My Profile settings*

6. <u>Initiating a New Request</u>

To create a new Request, select *New Request* from the menu at the top of the homepage.

Step 1
<u>Confirm Contact Information</u>
The contact information will default to your *My Profile* settings. Information may be edited here if the contact information and address for the intended recipient is different.

If contact information is correct/complete, go to the bottom of the page and select the *Step 2 Add Items.*

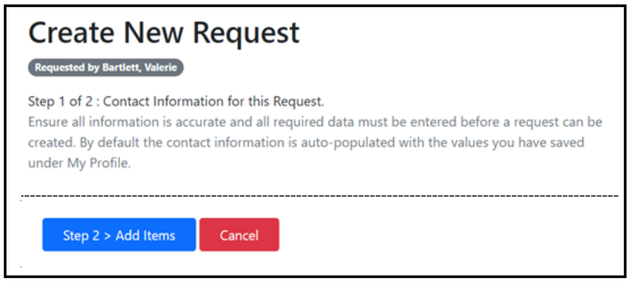


Figure 5 *Create new request: Confirm contact information*

Step 2
<u>Add Items</u>
Hover over each field to see an information text box.

If you leave the page without completing and sending the request, the system will auto save your details as a draft to complete later

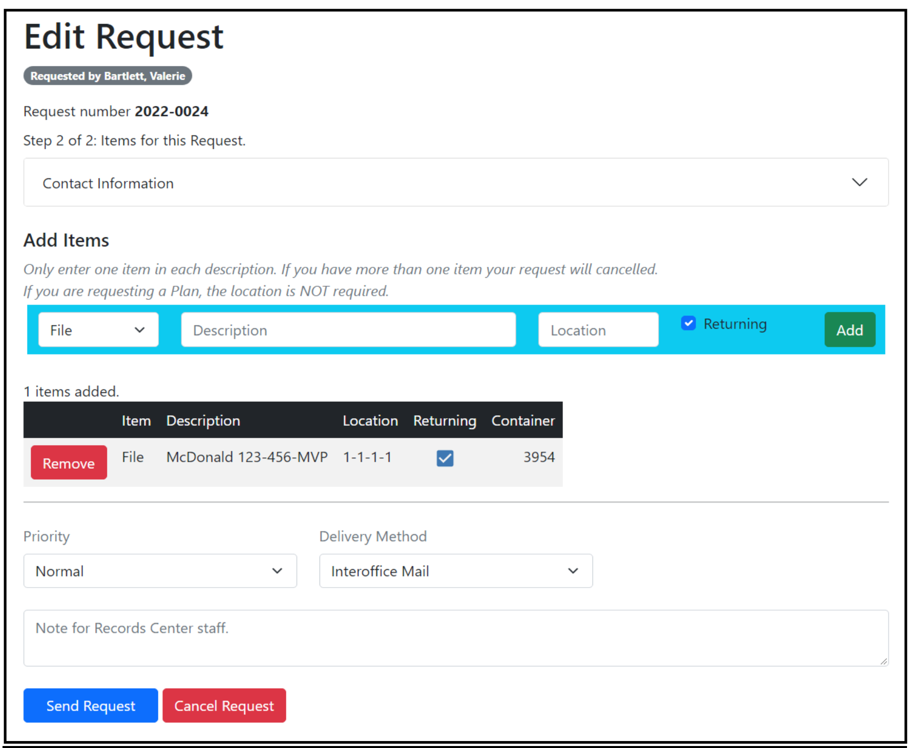


Figure 6 *Step 2 page for creating new request*

- **Contact Information**:
  Check contact information by hitting the down arrow in the Contact Information field. Remember this autopopulates from your Profile details.
- **Add Items**
  Each field provides an information text box when hovering over the field.
  If you leave without sending the request, the system will save your added items as a draft to complete later.

Type: Specify the items you need beginning with the item type from the dropdown list.

Description: Enter the name/number of one file, batch, or plan you are requesting.

<u>**Note**</u>: You can request only **one** item per line. Records Centre will render any request with multiple items in one line as invalid and the user will be asked to make the correction and resubmit.

Example:	**Item**	**Description**	**Location**
Do:	File	John Smith	1-2-3-4
	File	Jane Doe	1-2-3-4
Don't:	File	John Smith, Jane Doe	1-2-3-4

Location: Enter the 4-part Records Centre box location number. (e.g. 23-7-9-5).

Aisle	Bay	Shelf	Box
23	7	9	5

<u>**Note:**</u> Locations for <u>**boxes**</u> recalled by departments are reserved for two (2) years only. After two (2) years the locations will be de-accessioned for re-use.

Returning?: Indicate if the item will be returned to Records Centre or retained by the department. The default setting is "Returning". If the item will <u>not</u> be returned to Records Centre, uncheck the box and update your transfer list.

<u>**Note**</u>**:** When you indicate that a **box** will not be returning, the box is automatically removed from the Records Centre system and the space on the shelf will be re-assigned. The system will give you a warning message so that you avoid de-accessioning a box unintentionally.

Add: Once you have completed entering the details of your retreival request, click the *Add* button to add it to the request. The item summary will appear below and the fields will clear ready for the details of the next entry.

Once you have completed adding requested items, set the priority and method of delivery.

- **Priority and Delivery Method:** Select the appropriate priority level and method of delivery from the dropdown lists.

  The default is set to *Normal* priority level and delivery via *Interoffice Mail*. If you choose Priority Post, you will be asked to enter your Priority Post billing number.

  <u>**Note**</u>**:** The requests are processed as they arrive at the Records Centre, on a first-in, first-out basis. The turnaround time is usually the same day. Therefore, the *Rush* priority option should only be used for emergency circumstances when a file or box is needed <u>immediately</u>. Interoffice mail does not provide a *Rush* service option.

- **Note for Records Centre staff**
  Enter any special instructions or added information you may have for the Records Centre staff.

- **Send Request**
  When you have completed entering your request item(s) details, review the information carefully. To complete the transaction, you must click *Send Request*. If you do not *Send Request*, the system will save the request items you added in a draft.

- **Cancel Request**
  To cancel the entire request before sending it, use the *Cancel Request* button.
  To only cancel one Request item, select the *Remove* button next to the added item.

6.1 Error Messages

Information that is not valid or complete will generate an error message. Some examples include inactive/invalid schedule numbers or missing description.

If you do not understand the error message, need clarification or more details, contact your departmental Records Manager. You will find that contact information on the homepage. If your agency does not have a Records Manager, send an email to Records.Centre@gnb.ca

***Figure 7**. Error message example*

6.2 Session timed out

After 30 minutes of inactivity, your login session will time out. If you leave the page you were on it will take you to a new login. This is for both internal and external clients. Choose the appropriate link to log back in and continue. Note that any request left undone will be automatically saved as a draft.

Figure 8. *Session timed out Login*

6.3 Notification Messages

You will receive email notifications as your records request moves through each step of the process from *Received (In Progress)* to *Completed*, including when an item has been cancelled.

You can reduce the number of email notifications by using the **Add** button to send separate items under one Request number. There is no limit to the number of items you can request.

TIP: If you are concerned about the number of emails being generated, it is advised that you create a special folder in your Inbox with rules to filter Records Centre emails to that folder. For instructions on setting up folders and rules, consult the *Help* feature in your *Outlook* menu and search “Manage email using rules”.

7. Searching Current and Past Requests

Your transfer history is displayed on *My Requests* page and is updated in real time. Requests history can be filtered based on department, fiscal year, and status, then sorted by column fields in the results table. Records Managers can also filter by client . You can access the complete details of an individual request via the corresponding *View* button.

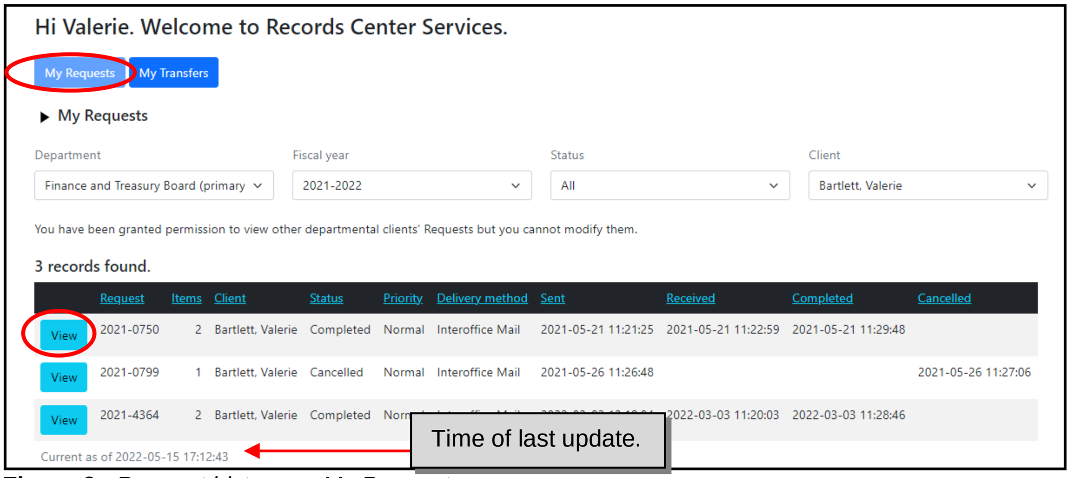


Figure 9. *Request history on My Requests page*

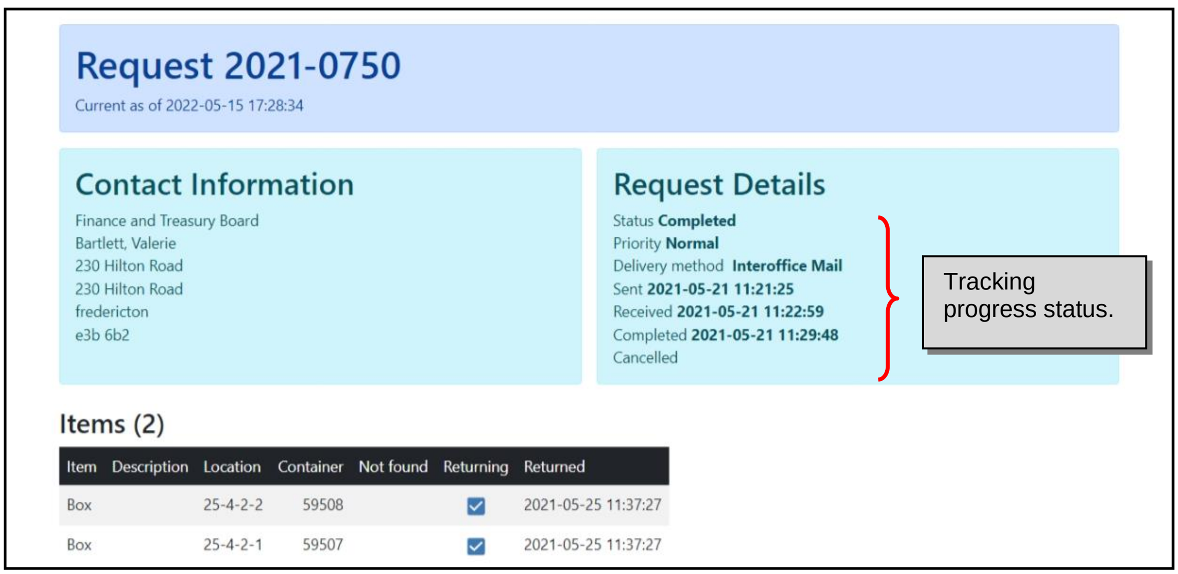


Figure 10. *View of Request detail.*

7.1 Tracking Your Requests

The status of your transfer is tracked and presented in the table on *My Transfers* page as well as in the individual detail view of the transfer.

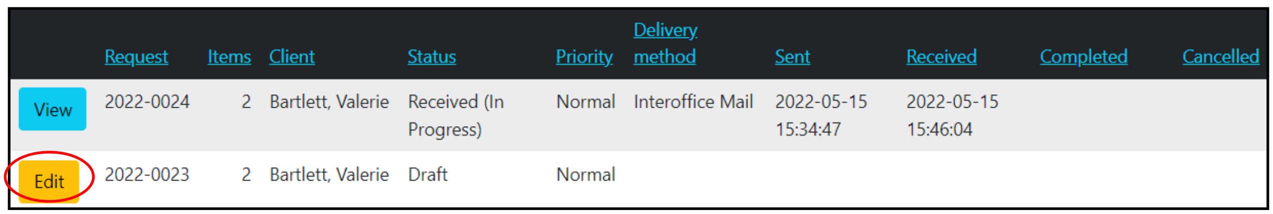
The transfer status definitions are:

Sent	submitted by the client.
Received	successfully received by Records Centre staff and in progress.
Completed	Item has been retrieved and prepared for pickup and delivery by interoffice mail or courier.
Cancelled	Request is removed from queue, no more action to be taken.

7.2 Editing or Cancelling Your Requests

Request details may be edited, or items cancelled by clients while still in draft by clicking the *"Edit"* button.

Note: You will not be able to cancel or edit the order once your request has been received by Records Centre staff.
If changes are necessary, send an e-mail to records.centre@gnb.ca.



	Request	Items	Client	Status	Priority	Delivery method	Sent	Received	Completed	Cancelled
View	2022-0024	2	Bartlett, Valerie	Received (In Progress)	Normal	Interoffice Mail	2022-05-15 15:34:47	2022-05-15 15:46:04		
Edit	2022-0023	2	Bartlett, Valerie	Draft	Normal					

Figure 11. *Edit function on draft requests.*

8. Additional Assistance

Your departmental Records Manager is the primary contact for questions or concerns regarding records management. They are the records expert for departments and public bodies and can respond to questions about records series and retention schedules specific to your area.

For questions about records storage and retrieval, or records transfer to PANB, contact the Records Centre: records.centre@gnb.ca.

The PANB *Corporate Information Management Unit* provides advice and assistance to all government organizations in the management of their information resources. This includes providing practical tools and information for everyday use to help Records Managers/records custodians with their information management activities. Visit the ***Corporate Information Management Unit*** on the *Provincial Archives of New Brunswick* website https://archives.gnb.ca. There you will find forms, standards and directives, FAQ's, checklists, calculation tables, bulletins and fact sheets geared to assist you in practicing effective records and information management.