

Setting Up Preferences – Part 3

Part 3 of this iRIMS tip will cover the **Boxing**, **Folders**, and **Labels** preference tabs.

To access your preferences select the **File** menu from the main toolbar in iRIMS and select **Preferences** (see **Figure 1.1**)

Boxing Tab (Figure 1.2)

The options under the **Boxing** tab enable you to enter default information to speed up the data entry of boxes.

Available Defaults and Explanation:

- **Type:** Defaults to the selected Box type code when inserting a new Box. *Default is Box.*
- **Status:** Defaults to the selected Box Status code when inserting a new Box. (PW&S Records Management updates this field when boxes are transferred to the records centre, or destroyed.)
- **Location:** Defaults to the selected Box Location code when inserting a new Box.
- **Disposition Type:** This field is used by PW&S Records Management for generating disposition labels.

Default Flags:

Box Destroy Date: This field is used by PW&S Records Management for generating Disposition Labels.

Box Status Date: Defaults to the current date when inserting a new box.

Transfer Create Date: Defaults the “Transfer Create Date” to the current date when inserting new transfers.

Create new record using:

- **Default Values:** Will reset fields to the original defaults.
- **Repeated Values:** Will leave the last values used in the fields.

(These options are used when the **New Button** available on Insert and Update is used.)

Contains: (Relates to records within a Box)

- **Originals:** Contains original (*paper*) Documents.
- **Copies:** Contains copy (*paper*) Documents

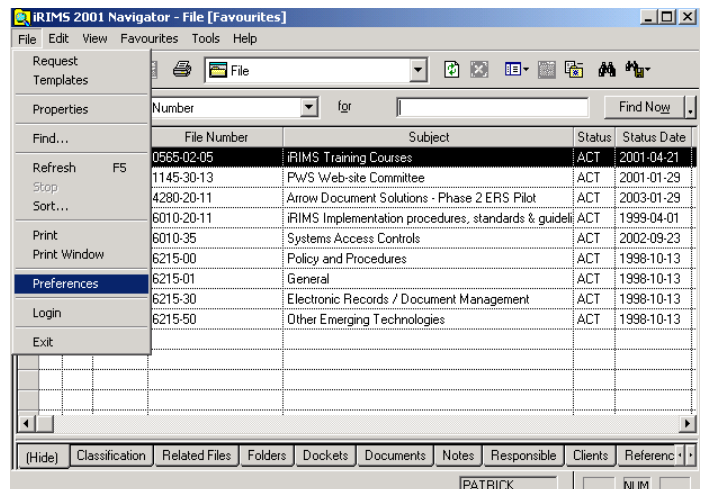


Figure 1.1 – iRIMS Preferences

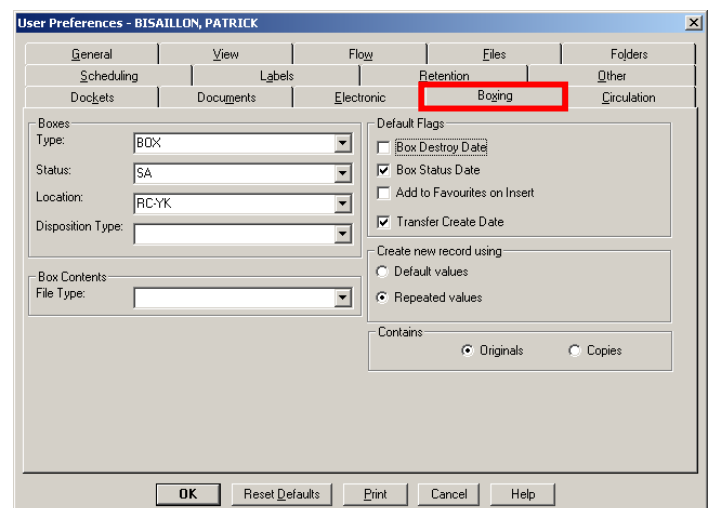


Figure 1.2 – Preferences - Boxing Tab

Folders Tab (Figure 1.3)

Available Defaults and Explanation:

- **Type:** Defaults the selected **Folder Type** code
Default is VOL
- **Location:** Defaults the selected **Folder Location** code (If there is no location code for your division, please contact Records Management at 873-7231)
- **Storage:** Defaults the selected **Folder Storage** code. *Default is PAP.*
- **Default Folder Status to File Status:**
 - **Yes:** Defaults the folder status code to the parent File status code.
 - **No:** Enables the Status Drop-down menu to select a folder status to be defaulted.
- **Status:** Defaults to the selected Folder Status code when inserting a new Folder. (PW&S Records Management updates this field when folders are transferred to the records centre, or destroyed.)
- **Contains:** (Relates to types of documents within a folder.)
 - **Originals:** Indicates Folder contains (**paper**) originals.
 - **Copies:** Indicates Folder contains (**paper**) copies.
- **Create new record using:** (These options are used when the **New Button** available on Insert and Update is used.)
 - **Default Values:** Will reset the fields to the original defaults.
 - **Repeated Values:** Will leave the last value used in the fields.
 (See Figure 1.4 for the “New” button)

Default Flags:

- **Folder From Date:** Today’s date is the default in the *Folder From Date* field when inserting a new Folder.
- **Folder To Date:** Today’s date is the default in the *Folder To Date* field when the *Closed* radio button on Folder Insert and/or Update windows is selected. If *Closed* radio button has not been selected, *Folder Date To* field is left blank.
- **Folder Status date:** Today’s date is the default in the *Folder Status Date* field when inserting a new Folder.
- **Folder Create Date:** Today’s date is the default in the *Folder Create Date* field when inserting a new Folder.

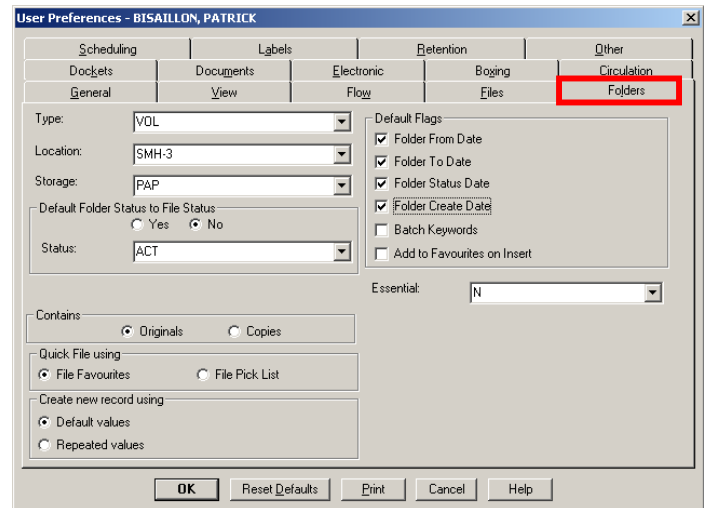


Figure 1.3 – Preferences - Folders Tab

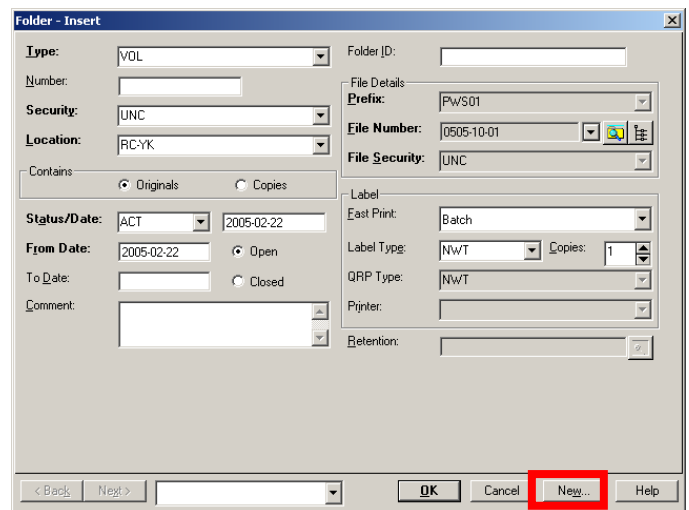


Figure 1.4 – Folder Insert Screen

Labels Tab (Figure 1.5)

The **Labels** preferences allows you to select what label format you would like to use, choose a default printer, and give you the option to batch your folder labels. For more information about the different label types, please contact Records Management at 873-7231.

- **Label Type:** Lists all available Label Types.
Default is NWT.
- **Copies:** Defaults the number of copies to print of this label.
- **QRP Type:** Lists all available QRP Types.
Default is NWT
- **Printer:** Defaults to a specific printer to be used for printing labels.
- **Fast Print on Create:** Enables the options to be carried out on insert. If left unchecked, no action will occur.
- **Options:**
 - **Save Format:** If labels will be edited using the edit label feature on the folder main view this option will save any changes made.
 - **Batch/ Save Format:** Similar to save format but will also insert the label into the batch print so it can be printed out later using the Label Batch Print feature of iRIMS. Label Batch Print can be found under the Tools -> Labels menu.
 - **Batch:** Inserts the label into the batch print so it can be printed out later using the Label Batch Print feature of iRIMS. Label Batch Print can be found under the Tools -> Labels menu.
 - **Print:** Select this option to print the label on Folder insert.

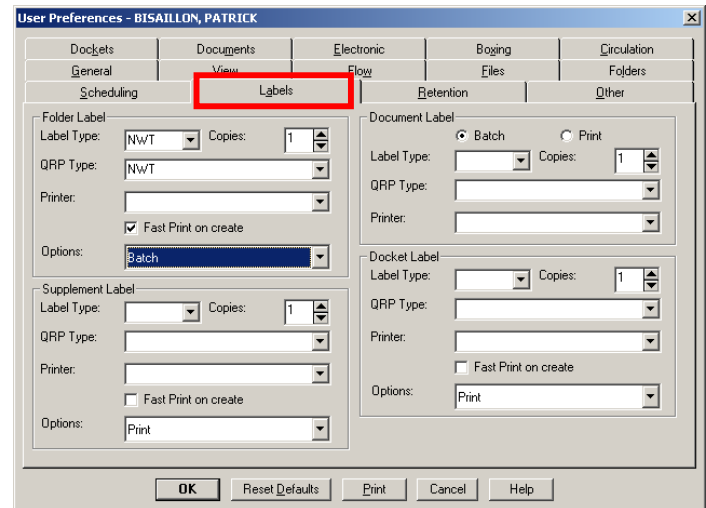


Figure 1.5 – Preferences - Labels Tab

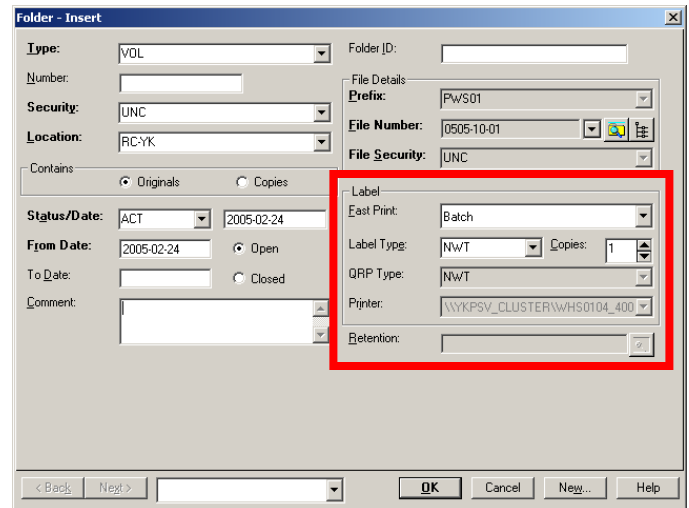


Figure 1.6 – Folder Insert Screen – Label Options