

Transfer Process

This tip explains the procedures that the Records Management Unit and GNWT Departments follow when creating new **Transfers** in iRIMS. The next tip(s) will cover the rest of the Transfer Process in iRIMS.

All records transfer requests should be routed through the departmental Records Coordinator first before being reviewed by the Records Analyst.

Transfer Creation

The first step is to create the actual **Transfer** in iRIMS. Once your transfer is created, you will receive a **Transfer ID** number that will be assigned to each box that belongs to the Transfer.

1. From the **View** menu, click **Transfer** – the **iRIMS 2001 Navigator – Transfer** desktop is displayed.

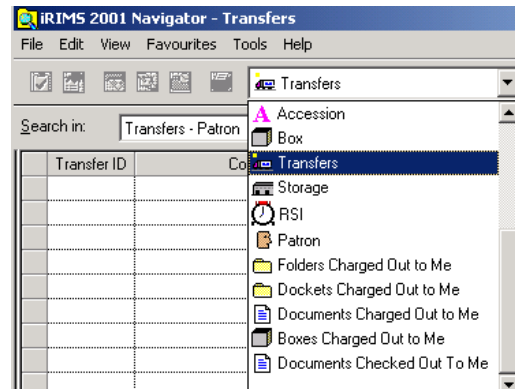


Figure 1.1 – Transfers View

2. Click **Insert** from the **Edit** menu – the **Transfer-Insert** window is displayed.

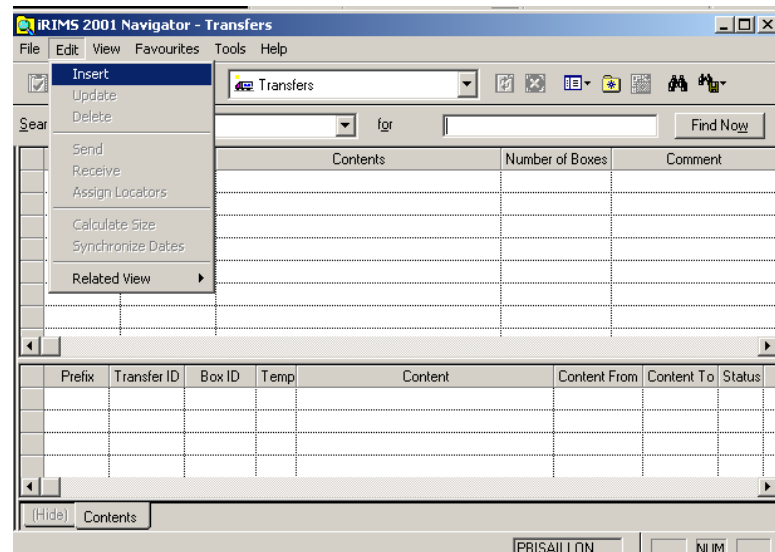


Figure 1.2 – Transfer – Insert

3. Do not enter any information into the **Transfer ID** field – the **Transfer ID** is generated by iRIMS upon insert.
4. Enter today's date in the **Created** field if not defaulted.
5. Select the name of the user who is responsible for this **Transfer** from the **Patron** drop down menu. This Field is optional.
6. The **Comment** field is used to enter the department's "**Request for Records Transfer Reference Number**" and the records management "**Disposition File Number**")
7. The **Number of Boxes** field identifies the number of boxes assigned to this **Transfer**. Enter the number of boxes for this transfer.
8. The **From/To** field identifies the range of dates of material stored in Boxes that are to be assigned to this **Transfer**. *(In the "From" field, enter the date of the earliest dated record in the transfer. In the "To" field, enter the date of the latest dated record in the transfer)*
9. The **Contents** field is used to identify the **Department/Division code, or Region/Community if outside of Yellowknife**. This field is also used to identify the type of material stored in the boxes that are to be assigned to the **Transfer**
10. Click the **OK** button to save the information and close the window.

Note: It is a good idea to write down the **Transfer ID #** that is generated by iRIMS as you will need to refer to the **Transfer ID** on a regular basis throughout the transfer process.

Figure 1.3 – Transfer Insert Screen

Figure 1.4 – Completed Transfer - Properties

Transfer ID	Create Date	Contents	Number of Boxes	Comment	Sent	Date R
3259	2004-04-06	RWED - Investment & Economic Analysis (RWE)	2	Reference # 04826-2 (Slp)	2004-04-26	2004-04-28

Figure 1.5 – Transfer View