

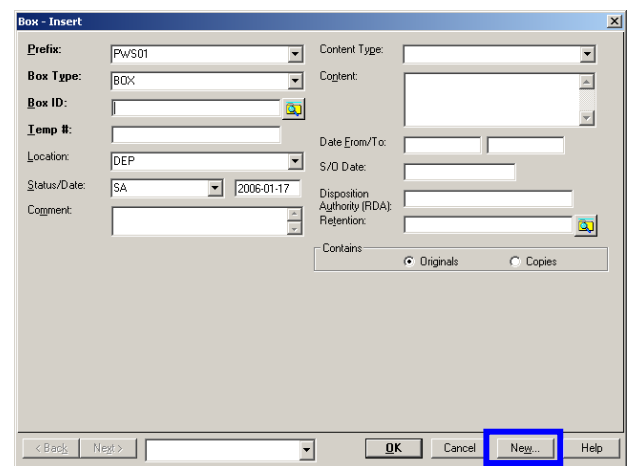
Using the “New” Button

Have you been entering multiple boxes or files that always have the same type of information to be entered on the profile form? If so, then this iRIMS Tip may be helpful to you. This tip covers explains the “**New**” button that is found on the File, Folder, & Box insert screens.

Note: The Box Insert Screen is being used for this example. The same process applies to the File & Folder insert screens.

On each of the insert screens (Box, Folder, File) there is a “**New**” button that is found at the bottom of the profile form next to the “**Cancel**” button. The main purpose of this button is to create a new box without having to click OK, and then Edit – Insert again to bring up another insert screen.

The “**New**” button allows you to either enter a new box based on your “**Default Values**” (setup in your preferences – [See iRIMS Tip 11](#)) or a new box based on “**Repeated Values**”.



The screenshot shows the 'Box - Insert' dialog box with the following fields and values:

- Prefix: PWS01
- Box Type: BDX
- Box ID: (empty)
- Temp #: (empty)
- Location: DEP
- Status/Date: SA, 2006-01-17
- Content Type: (empty)
- Content: (empty)
- Date From/To: (empty)
- S/O Date: (empty)
- Disposition Authority (RDA): (empty)
- Retention: (empty)
- Contains: Originals, Copies

The 'New...' button at the bottom right is highlighted with a red box.

Figure 1.1 – Box Insert Screen - Default

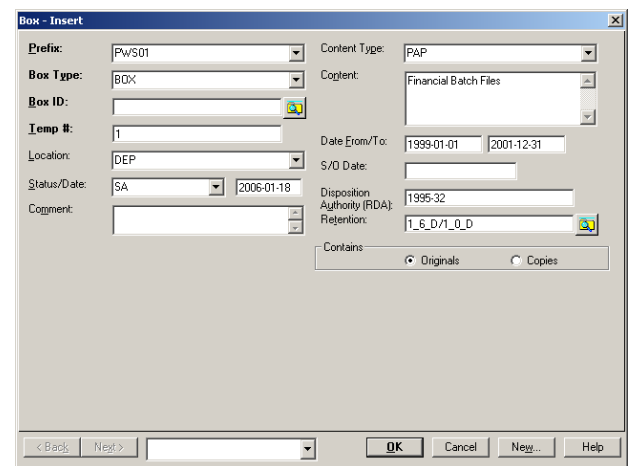
Default Values

Default Values are defined and setup in your Preferences. These values will always come up when inserting objects (File, Folder, Box). Figure 1.1 displays the Box Insert screen with the default values setup.

Repeated Values

Repeated Values are defined by whatever information you just entered on the profile form. Say for example you have 20 boxes that need to be entered that all contain “Batch Files” for the same years. By using the Repeated Values, the only information on the profile form that would need to be changed for all the other boxes would be the Temp # field.

This would save you from re-typing all of the same information for each box.



The screenshot shows the 'Box - Insert' dialog box with the following fields and values:

- Prefix: PWS01
- Box Type: BDX
- Box ID: (empty)
- Temp #: 1
- Location: DEP
- Status/Date: SA, 2006-01-18
- Content Type: PAP
- Content: Financial Batch Files
- Date From/To: 1999-01-01, 2001-12-31
- S/O Date: (empty)
- Disposition Authority (RDA): 1995-32
- Retention: 1_6_D/1_0_D
- Contains: Originals, Copies

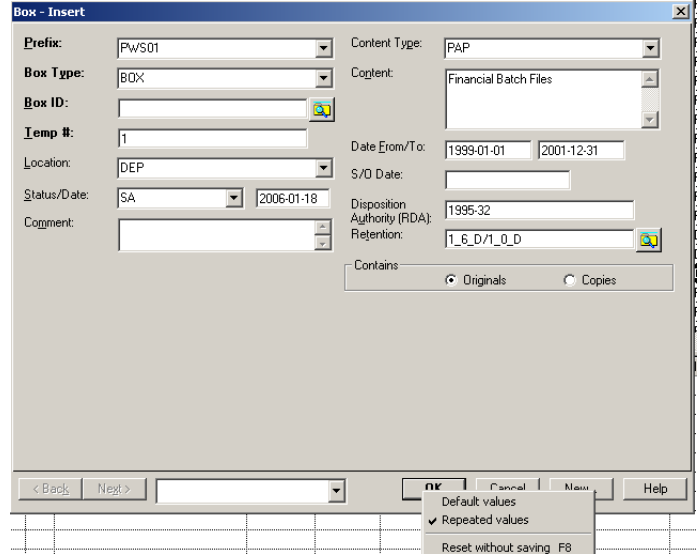
The 'New...' button at the bottom right is highlighted with a red box.

Figure 1.2 – Box Insert Screen - Repeated

Usage

The quickest way to switch between using Default Values & Repeated Values is by “**Right Clicking**” on the “**New Button**” and defining which method you would like to use for the current set of boxes that you are entering.

If you have a lot of boxes that are related in content, then use the “Repeated Values” to save you time on re-entering the Content, Type, Dates, RDA, etc. It may appear that nothing happened after you clicked the “New Button” because the profile form looks identical. Remember to change the values in the fields that shouldn’t stay the same (IE: Temp #, Dates)



The screenshot shows a 'Box - Insert' dialog box with the following fields and values:

- Prefix: PWS01
- Box Type: BOX
- Box ID: [Empty]
- Temp #: 1
- Location: DEP
- Status/Date: SA 2006-01-18
- Comment: [Empty]
- Content Type: PAP
- Content: Financial Batch Files
- Date From/To: 1999-01-01 2001-12-31
- S/O Date: [Empty]
- Disposition Authority (RDA): 1995-32
- Retention: 1_6_D/1_0_D
- Contains: Originals Copies

At the bottom, a context menu is open over the 'New' button, with 'Repeated values' selected. Other options include 'Default values' and 'Reset without saving F8'.

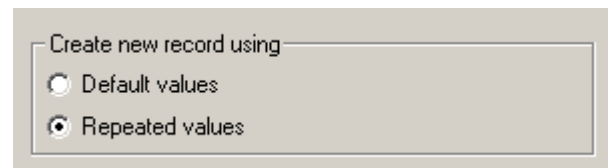
Figure 1.3 – Values Selection

If you are done with the set of boxes and want to clear the profile form, you can either select “Default Values” from your list, or click on OK and this will create the box, and complete the insert process.

Preferences

If you see that you are always using the “Repeated Values” instead of the “Default Values” then you can define in your preferences what you would like defaulted. If you define it in your preferences, then you will not have to select the methods on the profile form – unless you want to use a different method for the type of information you are entering.

Under the following tabs in your preferences (Boxing, Files, Folders) there is a section called: “**Create new record using**” (Figure 1.4). Select which method you would like to use for each of the objects (Box, File, Folder).



The screenshot shows a preference section titled 'Create new record using' with two radio button options:

- Default values
- Repeated values

Figure 1.4 – Preferences

Remember, you can change these values at anytime that you wish by “Right Clicking” on the “New Button” on the insert screens.

If you would like more information on how to use this function, please contact Records Management at 873-7231.