

CENTRAL EUROPEAN UNIVERSITY

Records Center Database

USER MANUAL

Budapest
2012

Table of Content

Introduction	3
Access & Rights	3
How to register?	4
How to log in?	5
Opening page	6
Simple View & Extended View	6
Browsing records	7
Searching records	8
How to retrieve Records from the CEU Records Center?	9
Retrieval Form Tab	10
How to transfer material to the CEU Records Center?	12
New Transfer Tab	12
A step-by-step guide for transferring records	12
Adding containers	13
Adding folders inside container	14
Bad Examples and Some Suggestions for Container Descriptions	17
Old Transfers Tab	19
Destruction Tab	19
My Profile Tab	20
Help Tab	20

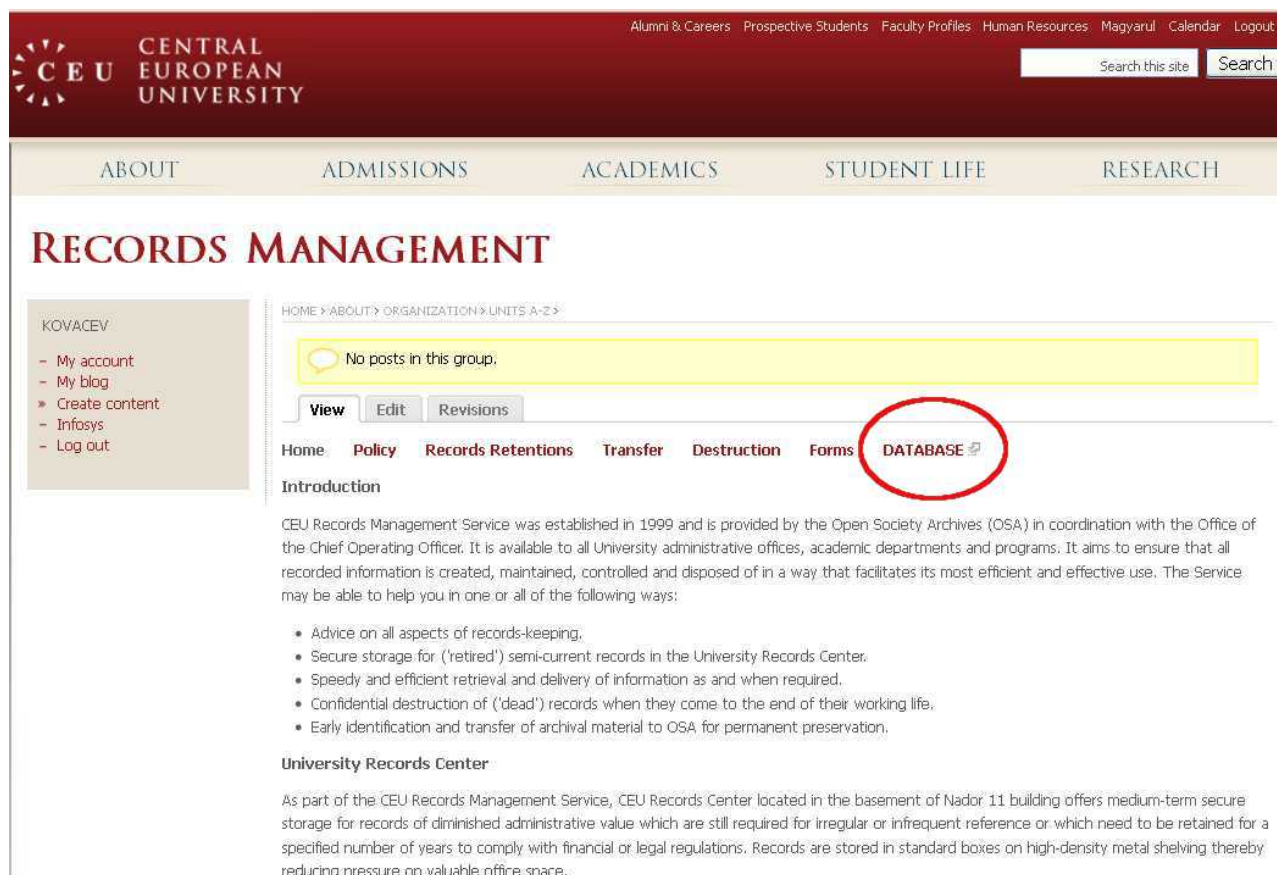
Introduction

OSA Records Management team developed a new CEU Records Center web-based database. The system provides full intellectual and physical control of the CEU semi-active and non-active records. It also offers careful and controlled tracking of the records deposited in the Records center (Nador 11) and ensures that they are readily available. CEU staff responsible for archiving will be able to locate their records and retrieve them within a short time.

This User Manual provides an overview of the system's features and intents to explain its different functions such as how to **transfer and properly describe records to be archived in the Records Center** or **how to find and retrieve already archived records**. The CEU-RCDB is designed in a user-friendly and self-explanatory way; however this step-by-step guideline will help you to get familiar with it more closely. All these features and functions were developed in order to support effective records management procedures.

Access & Access Rights

CEU-RC database can be accessed through CEU website, Records Management page, at <https://www.ceu.hu/records>



CEU CENTRAL EUROPEAN UNIVERSITY

Alumni & Careers Prospective Students Faculty Profiles Human Resources Magyarul Calendar Logout

Search this site Search

ABOUT ADMISSIONS ACADEMICS STUDENT LIFE RESEARCH

RECORDS MANAGEMENT

KOVACEV

- My account
- My blog
- » Create content
- Infosys
- Log out

HOME » ABOUT » ORGANIZATION » UNITS A-Z »

No posts in this group.

View Edit Revisions

Home Policy Records Retentions Transfer Destruction Forms **DATABASE**

Introduction

CEU Records Management Service was established in 1999 and is provided by the Open Society Archives (OSA) in coordination with the Office of the Chief Operating Officer. It is available to all University administrative offices, academic departments and programs. It aims to ensure that all recorded information is created, maintained, controlled and disposed of in a way that facilitates its most efficient and effective use. The Service may be able to help you in one or all of the following ways:

- Advice on all aspects of records-keeping.
- Secure storage for ('retired') semi-current records in the University Records Center.
- Speedy and efficient retrieval and delivery of information as and when required.
- Confidential destruction of ('dead') records when they come to the end of their working life.
- Early identification and transfer of archival material to OSA for permanent preservation.

University Records Center

As part of the CEU Records Management Service, CEU Records Center located in the basement of Nador 11 building offers medium-term secure storage for records of diminished administrative value which are still required for irregular or infrequent reference or which need to be retained for a specified number of years to comply with financial or legal regulations. Records are stored in standard boxes on high-density metal shelving thereby reducing pressure on valuable office space.

... or directly through the following link <http://ceurcd.osaarchivum.org/office/>

... which brings you to the database login page

Login	
Email:	
Password:	
Submit	

Forgot your password?
[New Password](#)

You don't have an OSI-RCDB account?
[Register Here](#)

If you are not yet a registered user, click on “Register Here”. This link goes to the Registration page (see screenshot below)

How to register?

At this point, all departmental and central offices administrative staff is eligible to register to the database. Registration process requires you to fill in several information that identify you unambiguously.

Registration	
*Email:	
*Password:	
*Retype Password:	
*First Name:	
*Last Name:	
Position:	
Phone1:	
Phone2:	
* Select the main CEU Unit (Department/Program/Sub-Program) where you are working:	
...please select ...	
*Type the Characters:	
(Letters are not case-sensitive)	
Get another image	
Submit	

* Mandatory Fields

If you work for more than one CEU Unit, please contact the CEU Records Coordinator.

Do you want to login to CEU-RCDB?
[Login Page](#)

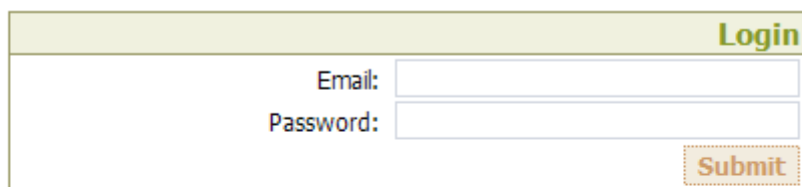
Forgot your password?
[New Password](#)

Please fill out the fields on the Registration page. All fields marked with an asterisk are mandatory fields. When you are done, select CEU Unit where you are working and then type the security code into the field you see in the image below. The letters are not case-sensitive. In case you cannot figure out the code, change it by clicking on “Get another image”. If you work for more than one CEU Unit, please contact the CEU Records Assistant Milos Pavlovic at pavlovicm@ceu.hu.

After submitting your registration you will receive an automatic confirmation once your account is activated.

How to log in?

For logging in, please enter your email address and password.

A login form with a light green header bar containing the word "Login" in green. Below the header, there are two input fields: "Email:" and "Password:". To the right of the "Password:" field is a "Submit" button with a dashed border.

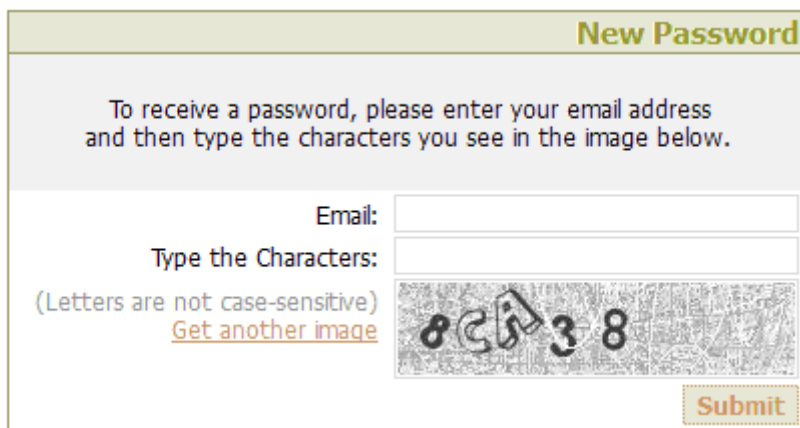
[Forgot your password?](#)

[New Password](#)

[You don't have an OSI-RCDB account?](#)

[Register Here](#)

In case you forgot your password click on “New Password” and fill out the field.

A "New Password" form with a light green header bar containing the text "New Password" in green. Below the header, there is a grey box with the text: "To receive a password, please enter your email address and then type the characters you see in the image below." Below this, there are two input fields: "Email:" and "Type the Characters:". To the left of the "Type the Characters:" field is the text "(Letters are not case-sensitive)" and a link "Get another image". To the right of the "Type the Characters:" field is a CAPTCHA image showing the characters "8cA38". To the right of the CAPTCHA image is a "Submit" button with a dashed border.

Your password will be sent in an email to you, which you can later change on the **My Profile** page.

Opening page

Once you enter the database, you will be directed to the **Search & Retrieve** page, where all your records stored in the CEU Records Center are displayed:

CEU CENTRAL EUROPEAN UNIVERSITY

Records Center Database

Logged in Branko Kovacevic
Logout

Search & Retrieve New Transfer Retrieval Forms Help Extended View

Search

Select your CEU Unit: Admissions Office / Student Services Department

Records Series: ... All Records Series for Unit(s) ...

Search: Year: Search Less Search Options Export HTML Export CSV

☒ Descriptions ☐ Records Series ☐ Contact Person ☐ Confidential Only ☐ Vital Only ☒ Active Only

Found in: ... The Following Unit(s) ...

170 containers (Displaying results 161 - 170) Sort by: [...] Page length: 40

CEU Unit: Admissions Office / Student Services Department

	Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Destroyed	Retrieval Form
161	Applications - rejected	S (Box10)	2008-2009			box	N11		Add
162	Applications - rejected	U-V-W-Z (Box11)	2008-2009			box	N11		Add
163	Applications - rejected	A-Z	2009-2010			box	N11		Add
164	Applications - rejected	A-Z	2010-2011			box	N11		Add
165	Enrollment confirmation form	2010/2011 - Economics, Environmental, IRES, Legal Studies, Mathematics, Medieval Studies, Philosophy	2010-2011		7 folders	binder	N11		Add
166	Enrollment confirmation form	2010/2011 - DPP, Gender Studies, History, Nationalism, Political Science, Sociology	2010-2011		6 folders	binder	N11		Add
167	Enrollment confirmation form	2009/2010 - Economics, Environmental Science, Exchange/visiting - Enrollment Confirmation Form, Gender Studies, History, IRES, Mathematics, Na... [more]	2009-2010		11 folders	binder	N11		Add
168	Enrollment confirmation form	Visiting/Exchange Students ECF 2002/2005	2002-2005			binder	N11		Add
169	Admissions package	BUSI_BSC 0904_STA /IELTS 2009/2010, BUSI_DDIB_0704_SAT / TOEFL 2007/2008, DDIB_0803_04_SAT / TOEFL 2008/2009, DDIB_0808_04_SAT / TOEFL 2008/... [more]	2004-2010		7 folders	binder	N11		Add
170	Enrollment confirmation form	Full-time MBA 0304_ECF 2003/2004, WMBA_0304_ECF 2003/2004, WMBA_0405_ECF 2004/2005	2003-2005		3 folders	binder	N11		Add

170 containers (Displaying results 161 - 170)

Simple View & Extended View

The CEU-RCDB is designed to provide users with two different interfaces for basic and advanced functions called **Simple** and **Extended View**. The main difference between the two interfaces is the number of quick links at the top of the screen to other parts of the database. The Simple View of the system is set up as the default and contains four most frequently used tabs:

CEU CENTRAL EUROPEAN UNIVERSITY

Records Center Database

Search & Retrieve New Transfer Retrieval Forms Help

- Search & Retrieve
- New Transfers
- Retrieval Form
- Help

The Extended View contains three additional links:



- Search & Retrieve
- New Transfers
- **Old Transfer**
- Retrieval Form
- **Destruction**
- **My Profile**
- Help

Browsing records

Database opening page displays a list of **active** (not destroyed) records sorted by containers and folders and in a way they were described during the transfer. If Container (box or binder) description is too long, you can see the entire description by clicking on the link **[more]**.

170 containers (Displaying results 161 - 170)

Sort by: [...]

Page length: 40

« « ... 2 3 4 5 ... » »

CEU Unit: Admissions Office / Student Services Department

	Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Destroyed	Retrieval Form
161	Applications - rejected	S (Box10)	2008-2009			box	N11		Add
162	Applications - rejected	U-V-W-Z (Box11)	2008-2009			box	N11		Add
163	Applications - rejected	A-Z	2009-2010			box	N11		Add
164	Applications - rejected	A-Z	2010-2011			box	N11		Add
165	Enrollment confirmation form	2010/2011 - Economics, Environmental, IRES, Legal Studies, Mathematics, Medieval Studies, Philosophy	2010-2011		7 folders	binder	N11		Add
166	Enrollment confirmation form	2010/2011 - DPP, Gender Studies, History, Nationalism, Political Science, Sociology	2010-2011		6 folders	binder	N11		Add
167	Enrollment confirmation form	2009/2010 - Economics, Environmental Science, Exchange/visiting - Enrollment Confirmation Form, Gender Studies, History, IRES, Mathematics, N.... [more]	2009-2010		11 folders	binder	N11		Add
168	Enrollment confirmation form	Visiting/Exchange Students ECF 2002/2005	2002-2005			binder	N11		Add
169	Admissions package	BUSI_BSC 0904_STA / IELTS 2009/2010, BUSI_DDIB_0704_SAT / TOEFL 2007/2008, DDIB_0803_04_SAT / TOEFL 2008/2009, DDIB_0808_04_SAT / TOEFL 2008/... [more]	2004-2010		7 folders	binder	N11		Add
170	Enrollment confirmation form	Full-time MBA 0304_ECF 2003/2004, WMBA_0304_ECF 2003/2004, WMBA_0405_ECF 2004/2005	2003-2005		3 folders	binder	N11		Add

Sometime a container has several folders in it. To see which one, in the **Folders** column you can click on the blue link showing the number of the folders (e.g. "6 folders") and all folders will be listed as in the screen shot below.

170 containers (Displaying results 161 - 170)

Sort by: [...]

Page length: 40

« « ... 2 3 4 5 ... » »

CEU Unit: Admissions Office / Student Services Department

	Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Destroyed	Retrieval Form
161	Applications - rejected	5 (Box10)	2008-2009			box	N11		Add
162	Applications - rejected	U-V-W-Z (Box11)	2008-2009			box	N11		Add
163	Applications - rejected	A-Z	2009-2010			box	N11		Add
164	Applications - rejected	A-Z	2010-2011			box	N11		Add
165	Enrollment confirmation form	2010/2011 - Economics, Environmental, IRES, Legal Studies, Mathematics, Medieval Studies, Philosophy	2010-2011		7 folders	binder	N11		Add
166	Enrollment confirmation form	2010/2011 - DPP, Gender Studies, History, Nationalism, Political Science, Sociology	2010-2011		6 folders	binder	N11		Add

Folders

	Folder Description	Year	Retrieval Form
1	DPP 2010/2011	2010-2011	Add
2	Gender Studies 2010/2011	2010-2011	Add
3	History 2010/2011	2010-2011	Add
4	Nationalism 2010/2011	2010-2011	Add
5	Sociology 2010/2011	2010-2011	Add
6	Political Science 2010/2011	2010-2011	Add

Searching records

Besides by browsing records page by page, a particular container you are looking for may be found by entering search criteria in the **Search box**.

Search

Select your CEU Unit: Economics Department

Records Series: All Records Series for Unit(s) ...

Search: Exam Papers Year: 2005 Search [Less Search Options](#) | [Export HTML](#) | [Export CSV](#)

☒ Descriptions ☐ Records Series ☐ Contact Person ☐ Confidential Only ☐ Vital Only ☒ Active Only

Search can be narrowed down by selecting your CEU Unit and the Records Series. After that please enter your search term and/or document creation year. By default, search will go through **description fields** and **active (not destructed) records only**. You may want to tick/un-tick some other checkbox to expand or further narrow down your search. That way one can search by a **Records Series** name, the person who transferred records to the Records center (**Contact Person**) or among **confidential / vital records only**.

Search: Year: 2002 Search [Less Search Options](#) | [Export HTML](#)

☒ Descriptions ☐ Records Series ☐ Contact Person ☐ Confidential Only ☐ Vital Only ☒ Active Only

Once results of your search are displayed, they can be exported either as an Excel document by clicking on the **Export CSV** link in the Search box or into as a web page by clicking on the **Export HTML**.

The screenshot shows a search interface with the following elements:

- Select your CEU Unit:** Admissions Office / Student Services Department
- Records Series:** Admissions package
- Search:** [text input] **Year:** [text input] **Search** button
- Less Search Options** link
- Export HTML** and **Export CSV** links (circled in red)
- Checkboxes for: ☒ Descriptions, ☐ Records Series, ☐ Contact Person, ☐ Confidential Only, ☐ Vital Only, ☒ Active Only

The search field is not case-sensitive and text or names can be entered with or without Hungarian diacritics. First and last name may be written in any order: e.g. Kovács Mária, Mária Kovács, Kovacs Maria or Maria Kovacs will result in the same hits.

Listed containers can be sorted by different categories in the drop-down menu.

The screenshot shows a 'Sort by:' dropdown menu with the following options:

- [...]
- [...]
- Records Series
- Container Description
- C. V. (highlighted)
- Year
- Confidential
- Vital
- Retention Year
- Storage

In addition, if the search result is found in several CEU units, you can see the list of the units in the **Found in** section and narrow down the list of containers to only one of them by selecting.

The screenshot shows a 'Found in:' dropdown menu with the following options:

- ... The Following Unit(s) ...
- 38 conta
- Admissions Office / Student Services Department
- Curriculum Resource Center
- Special and Extensions Programs
- CEU Unit Summer University

How to retrieve Records from the CEU Records Center?

In order to retrieve material already sent to the Records Center, you have to perform an initial search as it is explained in the previous chapter. After you found container(s) you need, click the “Add” button in the **Retrieval Form** column at the end of the row.

38 containers (Displaying results 1 - 38)

Sort by: Records Series Page length: 40

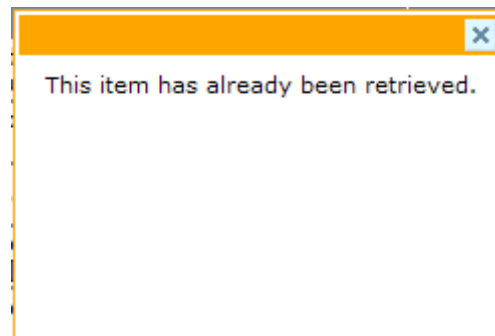
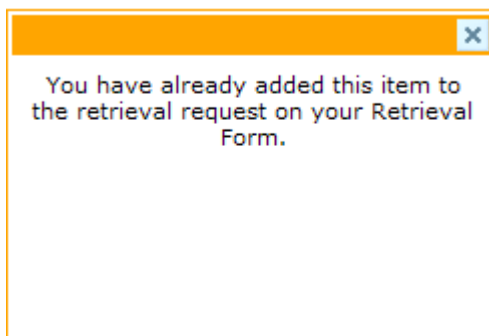
CEU Unit: Admissions Office / Student Services Department

You have successfully added the item(s) to the Retrieval Form.

	Records Series	Container Description	Containers	Cont.type	Storage	Destroyed	Retrieval Form
1	Applications - accepted	Mathematics, Medieval, Philosophy, 2002/2003		box	N11		Add
2	Applications - accepted	Legal (S-Y), Nationalism, 2002/2003		box	N11		Add
3	Applications - accepted	Legal (A-R), 2002/2003		box	N11		Add
4	Applications - accepted	Sociology, 2002/2003		box	N11		Add
5	Applications - accepted	Gender, History, 2002/2003	2002-2003	P	box	N11	Add
6	Applications - accepted	Environmental Studies, 2002/2003	2002-2003	P	box	N11	Add
7	Applications - accepted	Economics, 2002/2003	2002-2003	P	box	N11	Add

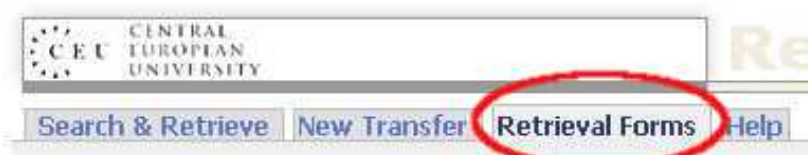
After you successfully added the item, you will see a green pop-up window with a message which confirms the procedure.

However, in case the item was already added to the Retrieval Form or retrieved by you or another user, a yellow pop-up message will alert you.



Retrieval Form Tab

Once all containers you need are selected, they will appear on the **Retrieval Form** tab.



The latest added form is on the top of the list.

Search & Retrieve New Transfer Retrieval Forms Help Extended View

Retrievals

	Retrieval ID	Request Date	Retrieval Date	Return Date	Containers	Folders	Status
1	0044				5 containers		Menu
2	0043	2012-02-21		2012-02-21	2 containers		returned

Check once again the list of containers you want to retrieve by clicking the link in the **Containers** column. It can be modified by pressing **Remove** button at the end of each container row.

Search & Retrieve New Transfer Retrieval Forms Help Extended View

Retrievals

Retrieval ID	Request Date	Retrieval Date	Return Date	Containers	Folders	Status
1 0044				5 containers		Menu

Containers

	Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Destroyed	Retrieval Form
1	Applications - accepted	Mathematics, Medieval, Philosophy, 2002/2003	2002-2003				N11		Remove
2	Applications - accepted	Legal (S-Y), Nationalism, 2002/2003	2002-2003				N11		Remove
3	Applications - accepted	Legal (A-R), 2002/2003	2002-2003				N11		Remove
4	Applications - accepted	Sociology, 2002/2003	2002-2003				N11		Remove
5	Applications - accepted	Gender, History, 2002/2003	2002-2003				N11		Remove

Once the list is ready, right click the **Menu** button at the right end of the row and select **Send retrieval** from the pop-up menu. After confirming with the pop-up window...



... your retrieval request will be sent to the OSA Records management team, who will provide you with the requested records.

After sending the request the status of your Retrieval Form will be changed into **sent**, which means that your retrieval request was sent via email to the administrators. After containers are delivered to you, the status will be changed to “retrieved”.

Retrievals

Retrieval ID	Request Date	Retrieval Date	Return Date	Containers	Folders	Status
1 0070	2011-06-09			1 containers		sent
2 0069	2011-06-03	2011-06-03		2 containers		retrieved

When your retrieval period is over (two weeks), the system will notify you via email if records were not returned to the records center.

How to transfer material?

New Transfer Tab

Inactive or semi-active records that are not frequently used are good candidates for transfer to the Records Center, so the precious office space is not wasted. These records are transferred and kept in the Records Center according to the CEU Records Management Policy and the Records Retention Schedule. In order to meet the requirements and easy retrieve records later, it is essential to pay attention to filling out the Transfer Form correctly. Precisely described records are important for effective storage and retrieval activities, they help in a systematic and controlled disposal process, and lower risk and exposure to litigation.

To find more on records management in general and existing CEU procedures see CEU website: <https://www.ceu.hu/records>

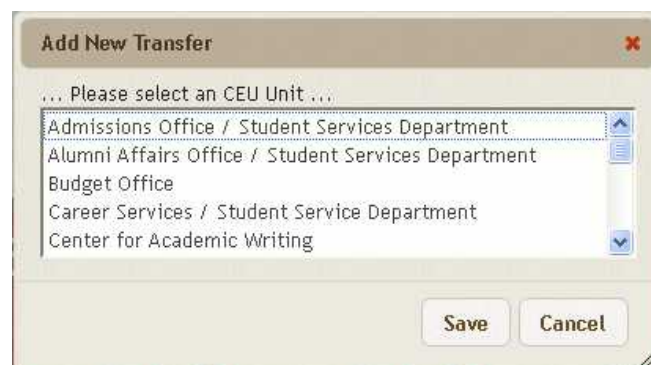
The New Transfer page is usually empty when you start with a new transfer. However, it is possible that at the New Transfer page you see previously started transfers which are still under process. Under the Menu button you will find the functions you will need to navigate your transfer through the process.

A step-by-step guide for transferring records

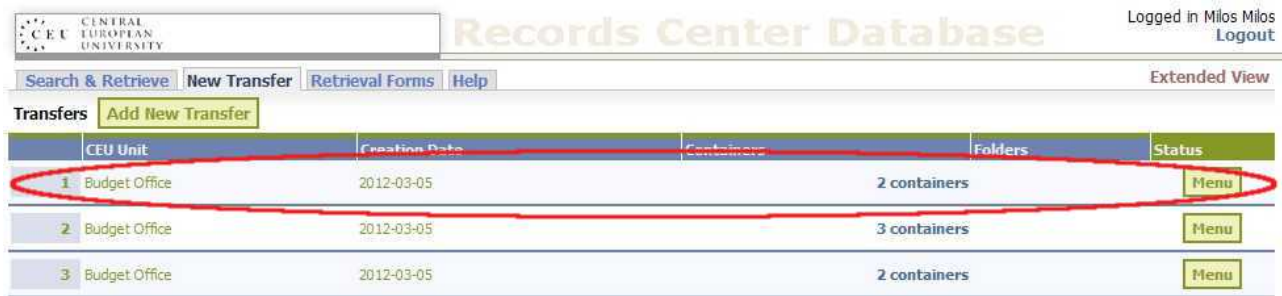
As a first step, click on the **Add New Transfer** button and select your CEU Unit, for which you would like to transfer the records.



By default, only the CEU unit(s) you are working for will be listed.



After selecting your department by pressing **Save** button, new transfer form will show up listed among the others.



Records Center Database

Logged in Milos Milos Logout

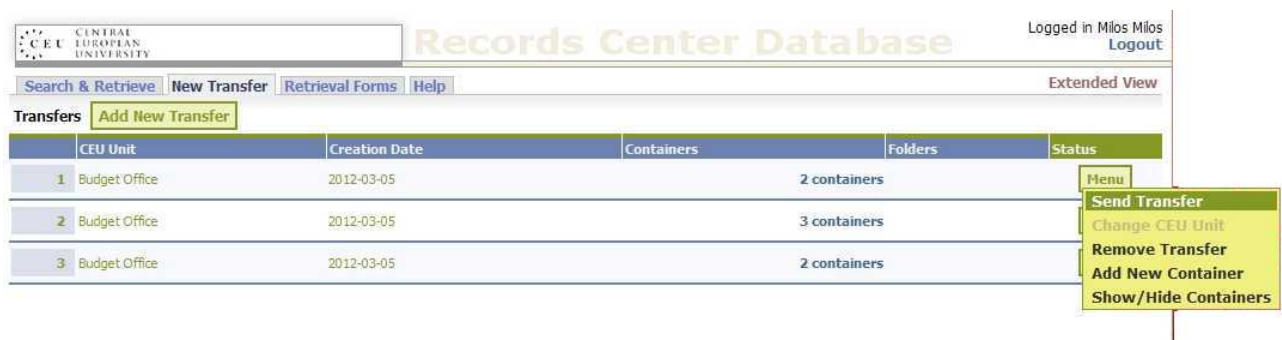
Search & Retrieve New Transfer Retrieval Forms Help

Transfers Add New Transfer

	CEU Unit	Creation Date	Containers	Folders	Status
1	Budget Office	2012-03-05	2 containers		Menu
2	Budget Office	2012-03-05	3 containers		Menu
3	Budget Office	2012-03-05	2 containers		Menu

Adding Containers

To list containers scheduled for a transfer, hover over the **Menu** button and from the pop-up menu select **Add New Container**



Records Center Database

Logged in Milos Milos Logout

Search & Retrieve New Transfer Retrieval Forms Help

Transfers Add New Transfer

	CEU Unit	Creation Date	Containers	Folders	Status
1	Budget Office	2012-03-05	2 containers		Menu
2	Budget Office	2012-03-05	3 containers		
3	Budget Office	2012-03-05	2 containers		

- Send Transfer
- Change CEU Unit
- Remove Transfer
- Add New Container
- Show/Hide Containers

And describe containers one by one in the form...



Add New Container

Records Series: [...]

Container Description:

Year From: To:

Container Type: binder

☐ Confidential ☐ Vital

Save Copy & Save Cancel

,,, by selecting appropriate **Records Series** and filling in all other information necessary to indentify a container during transfer and later if you need to retrieve it from the Records Center. **Please note that all fields are mandatory.**

By marking the “Confidential” and/or “Vital” check box(es), you can categorize your records according to the access rights and importance.

Add New Container

Records Series: Course evaluations

Container Description: International Finance

Year From: 2011 To: 2011

Container Type: binder

☒ Confidential ☐ Vital

Save Copy & Save Cancel

In case you have more containers with similar description, you can use the **Copy & Save** function to save time. This feature will open up the next container description window filled out exactly the same as the previous one. A tiny word “[copy]” appears in the Container Description field to remind you that this is the next container and you have to change the description only in the fields which differ from the previous description.

When you are done with describing all containers, please click on the **Save** button and they will be listed like this:

Search & Retrieve

New Transfer

Retrieval Forms

Help

Extended View

Transfers

Add New Transfer

	CEU Unit	Creation Date	Containers	Folders	Status
1	Economics Department	2012-03-06	3 containers		Menu

Containers

	Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Status
1	Course evaluations	International Finance	2011			binder		Menu
2	Course evaluations	Economics of Law	2011			binder		Menu
3	Course evaluations	International Trade	2011			binder		Menu

Adding folders inside container

In the previous screenshot thee described containers are saved and listed. In case you need to modify any of the information of the previously saved containers, you can still do it by clicking on **Edit Container** under the Menu button. The Menu button also offers removing the container completely if not needed, or adding individual folders within already created container. This can be used, for example, when transferring student files and one box contains several of them. Hove rover the **Menu** button at the end of the row of the chosen container and select **Add New Folder**

Search & Retrieve New Transfer Retrieval Forms Help Extended View

Transfers Add New Transfer

CEU Unit	Creation Date	Containers	Folders	Status
1 Economics Department	2012-03-06	3 containers		Menu

Containers

Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Status
1 Course evaluations	International Finance	2011			binder		
2 Course evaluations	Economics of Law	2011			binder		
3 Course evaluations	International Trade	2011			binder		

Edit Container
Remove Container
Add New Folder
Show/Hide Folders

In the pop-up window enter title of the folder:

Add New Folder

Folder Description: Kalman Edit, 2010-2011

Year From: 2010 To: 2011

Save Copy & Save Cancel

After all folders are described, click Save button and you can see the list of all of them.

Search & Retrieve New Transfer Retrieval Forms Help Extended View

Transfers Add New Transfer

CEU Unit	Creation Date	Containers	Folders	Status
1 Economics Department	2012-03-06	3 containers	5 folders	Menu

Containers

Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Status
1 Student files	Student Files 2010/2011	2010-2011		5 folders	binder		Menu

Folders

Folder Description	Year	Status
1 Cucu Alina-Sandra, 2010-2011	2010-2011	Menu
2 Bunjevac Lana, 2010-2011	2010-2011	Menu
3 Anderson Timothy, 2010-2011	2010-2011	Menu
4 Baiocchi Maria Lis, 2010-2011	2010-2011	Menu
5 Petrovic Marko, 2010-2011	2010-2011	Menu

2 Student files	Student Files 2010/2011	2010-2011		binder		Menu
3 Student files	Student Files 2010/2011	2010-2011		binder		Menu

Finally, when you've finished describing all the records to be transferred, your last step is to send the Transfer Form by clicking on the Send Transfer link under the menu button...

Transfers [Add New Transfer](#)

CEU Unit	Creation Date	Containers	Folders	Status
1 Economics Department	2012-03-06	3 containers	5 folders	Menu

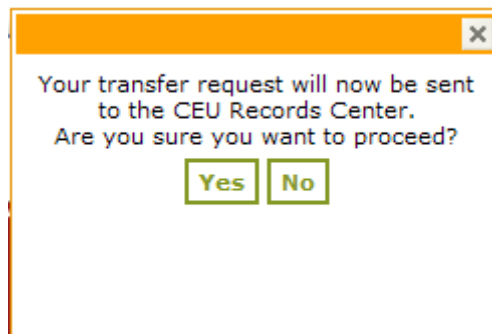
Containers

Records Series	Container Description	Year	Retention	Folders	Cont.type	Storage	Status
1 Student Files	Student Files 2010/2011	2010-2011		5 folders	binder		Menu

Folders

Folder Description	Year	Status
1 Cucu Alina-Sandra, 2010-2011	2010-2011	Menu
2 Cucu Alina-Sandra, 2010-2011	2010-2011	Menu
3 Bunjevac Lana, 2010-2011	2010-2011	Menu
4 Bunjevac Lana, 2010-2011	2010-2011	Menu
5 Baiocchi Maria Lis, 2010-2011	2010-2011	Menu
6 Baiocchi Maria Lis, 2010-2011	2010-2011	Menu

...and confirm your action.



After that, the status of your transfer will be change into “sent” in the **Status** column.

Transfers [Add New Transfer](#)

CEU Unit	Creation Date	Containers	Folders	Status
1 Economics Department	2012-03-07	3 containers	5 folders	sent

When your transfer form is reviewed and approved by the OSA RM team, its status will change into “approved” and after completion of the whole procedure (assigning storage locations to each container), it will disappear from **New Transfer** tab and be visible under **Old Transfers**.

Bad Examples and Some Suggestions for Container Descriptions

It is of crucial importance to describe records and containers properly since wrong or unclear descriptions can make search and retrieval difficult, in extreme cases even impossible. In case of auditing or litigation, finding records with delay or not finding them at all can harm your institution a lot. Be always sure that your container and folder descriptions are informative, clear, and comprehensible not only for you but for other colleagues or possible successors as well.

The descriptions should not be too general or too short. Avoid using acronyms and abbreviations or use them after you spell out the whole term; in case of grant numbers or other numbering systems, you should list all the numbers, not only e.g. “from 3001 to 3015” or e.g. “3001 through 3015”, included in a container in order to assist effective search and retrieval.



The screenshot shows a dialog box titled "Add New Container" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Records Series:** A dropdown menu with the selected value "Correspondence - Partnering Organizations".
- Container Description:** A text area containing the word "Correspondence".
- Year From:** A text box with the value "2000".
- To:** A text box with the value "2005".
- Container Type:** A dropdown menu with the selected value "binder".
- Confidential:** An unchecked checkbox.
- Vital:** An unchecked checkbox.
- Buttons:** "Save", "Copy & Save", and "Cancel" buttons at the bottom right.

Bad example 1

In this example the Records Series is “Correspondence - Partnering Organization” and the Container Description says “Correspondence”. This description is too general and redundant since you know from the Records Series already that the container contains correspondence. You should specify in the description the name of the partnering organization and the topic of the correspondence if possible.

Add New Container [Close]

Records Series: Payment files - petty cash

Container Description: petty cash HUF

Year From: 2000 To: 2000

Container Type: binder

☐ Confidential ☐ Vital

Save Copy & Save Cancel

Bad example 2

In this example is not enough to say “petty cash HUF” as description. It only clarifies the currency of the petty cash records; however, you need to describe the content more precisely. Usually, you have more binders from the year 2000 which contain petty cash HUF. Specify in the description the exact date range of the content of the particular binder and in addition the binder number if you think it is helpful.

Add New Container [Close]

Records Series: Grant files - organizational

Container Description: GI: from 3000 to 3015

Year From: 1998 To: 2004

Container Type: box

☐ Confidential ☐ Vital

Save Copy & Save Cancel

Bad example 3

The following example contains more mistakes. It is advisable not to use abbreviations in the description because some colleagues might not know what does it stand for, but also because users usually search for whole words and not for possible abbreviations. In

this case GI might stand for Grant ID, but also the term Grant Number is commonly used.

Let's assume that a user might want to retrieve Grant Number 3010. The easiest would be to put into the search field the number 3010 after you selected the CEU Unit for which you search for the given grant file. Obviously, it is not possible to find the particular grant file since the number was not written into the description field.

Because of records management practices, we ask the users not to pack into archival boxes records from a very wide date range. If the retention period of the above mentioned grant files is ten years, the first records from the box could be destroyed in 2009. However, since also records from 2004 are in this box, the content of the box can only be destroyed in 2015. We might waste money and time by keeping the box for an additional six years. Try to pack records into archival boxes from a narrow date range, for instance from 1998 to 2000 only.

In case of folder description, do not write the same description into the Container and Folder description field. For instance, putting all grantee names into the container description and then again into folder description is redundant. Put a general description into the Container Description field and a detailed specific description into the Folder Description field.

In case of binders or folders, write first the exact description of the binder or folder into the description field and then if you think that it is needed or useful and helpful write additional information after.

Old Transfers Tab



The Old Transfers page offers you the option to review all previous transfers, sorted by date or contact person.

Destruction Tab

CEU Records must be retained in a particular location (offices, records center) and form during the period of time which is set in the Records Retention Schedule. When the retention period expires, records should be destroyed or, if they have historical value, transferred to the Open Society Archives

Records to be destroyed will be selected by the Records Management Team according to the Retention Schedule. The Records Destruction Authorization Form will be prepared, listing all the containers with detailed description (records series name, container and folder description, and years). Responsible person at the administrative office or department have to check the container list and authorize the destruction. Only after the authorization is the Records Management team entitled to carry out the records destruction.

Destruction tab in the menu bar offers you the option to search for records which are already destroyed. All containers are listed here with violet color, just to distinguish them from those already in the Records Center.

	Records Series	Container Description	C.	Year	Folders	Destruction Date
1	Language tests	TEWS tests I, 2000		2000		2009-05-06
2	Language tests	TEWS tests II, 2000		2000		2009-05-06
3	Language tests	TEWS tests, 1999		1999		2009-05-06
4	Applications - rejected	AB- AZ, 2002/2003		2002-2003		2009-05-06

Search box is just the same as on the **Search & Retrieve** page. Therefore, you can filter your CEU Unit and Records Series, narrowing down your search according to the additional search criteria.

My Profile Tab

On this page, you can see your profile information and change them if needed. However, for changing your email address and the CEU Unit for which you work, please contact the Records Assistant at pavlovicm@ceu.hu.

Help Tab

On the Help page you will find the CEU RCDB User Manual and the administrator's contact information.