Version	Author : modifications	Date
1.00	AA : English Version (From V4)	11/05/2017

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1 – Introduction

This document focuses on Physical Archives Management Workflows in Damaris RM Software.
Here we explain 3 major tasks:

- New boxes and Files archiving
- Users requests
- Documents Finalization (Destructions)

2 – New Documents Declaration

You need to declare new boxes or files in your Archives database.

Here are steps to fulfill to achieve your task:

Archives Correspondant	Archivist
	Open a new Declaration Batch (2.1)
Declare boxes or files in an existing Batch (2.2)	
Close your Batch (2.3)	
	Batch Validation before receiving declared boxes / files (2.4)
	Receive boxes or files (2.5)
	Localize boxes / files (2.6)

2.1 – Open a new Declaration Batch
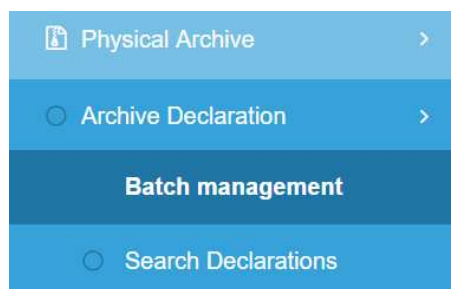
Company: [▼]   Departme

User: [   ]   Batch sta

FILTER	CREATE	EDIT	DELETE	PURGE BATCH	DE

Save Ordering

☐	Name ⇕	Opening date ⇕	State ⇕	Company ⇕
☐	Annuel2014	15/01/2014	Received	Démo Archives
☐	Annuel_140416	16/04/2014	Received	Démo Archives
☐	Mensuel_Mai2014	02/05/2014	Received	Démo Archives

Create batch   ✕

Batch name*: [   ]   Company: **Démo Archives**

Department*: [▼]   User: **Archives Administrateur**

Comments:

[   ]

[Create]   [Close]

Create batch   ✕

Batch name*: [BATCH2017   ]   Company: **Démo Archives**

Department*: [Direction générale ▼]   User: **Archives Administrateur**

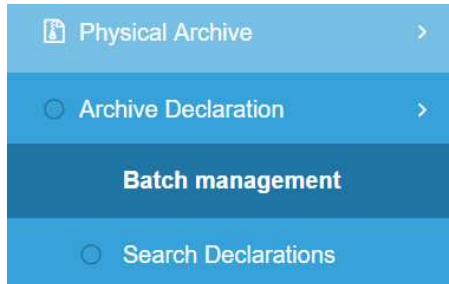Comments:

[   ]

[Create]   [Close]

☐	BATCH2017	11/05/2017	Open	Démo Archives	Direction générale	Archives Administrateur	0	0	Close

2.2 – Declare boxes and Files in an existing Batch

2.2.1 – From Batch Management Menu

In Actions menu, please choose your Archiving Type:
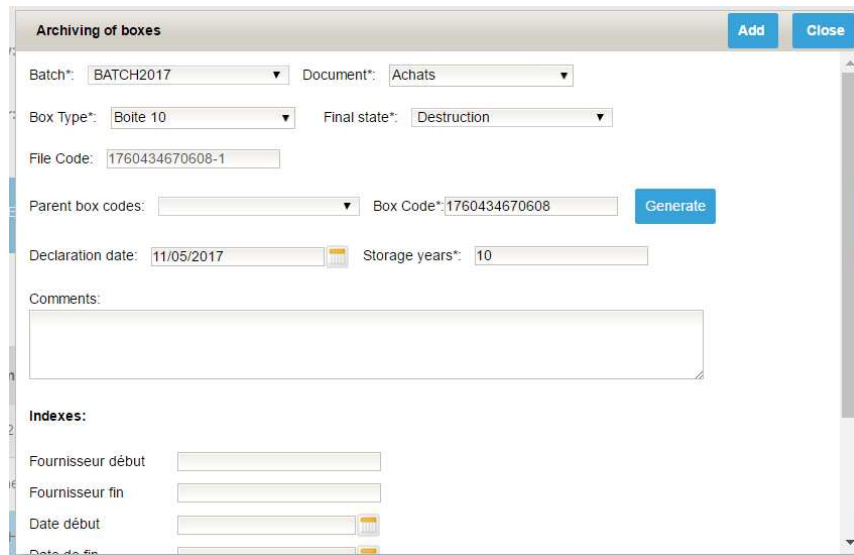
Please choose your Batch, your document type, and other fields describing your new box / file:
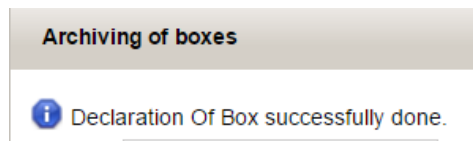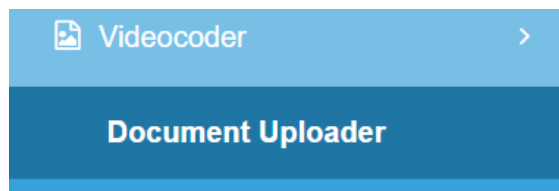
And validate your data by clicking on "Add" button.

A message confirms the process.

Each new Archiving declaration changes Box and Data counters:

2.2.2 – From Document Uploader Menu

Archives Correspondant can select document type and enter data.

| | Type: Documentation | Project : Damaris RM | Page 6 / 25 |

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Archive   Cancel

Company* :   Démo Archives

Document type* :   Achats

Archive Type* :   Archive physique

Index List:

Fournisseur début:

Fournisseur fin:

Date début:

Date de fin:

Exercice:

N° de facture:

Batch* :

Final state* :

Box Type* :

File Code* :
                     Generate

Box Code :
                     Generate

Parent box codes :

Declaration date :   11/05/2017

Storage years* :   10

If needed, please validate the "Keep values after processing" to maintain entered data for next box declaration.

Keep values after processing

Archive   Cancel

2.3 –Batch Closing

To find the right Batch, you can use filter existing batches:
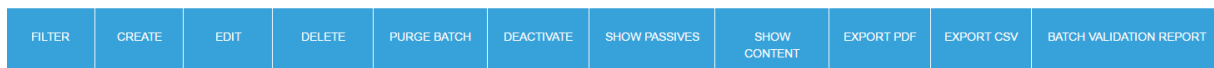
Please select the Batch by checking the line:

| ☑ | BATCH2017 | 11/05/2017 | Open | Dèmo Archives | Direction générale | Archives Administrateur | 1 | 2 | Close |

Click on "Show Content" button to view all boxes declared in chosen Batch:

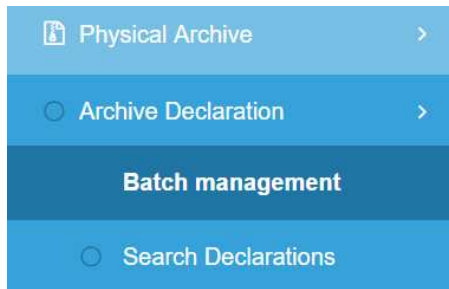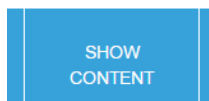To close a Batch please click on « Close » button right side of selected line :

Please validate the operation:
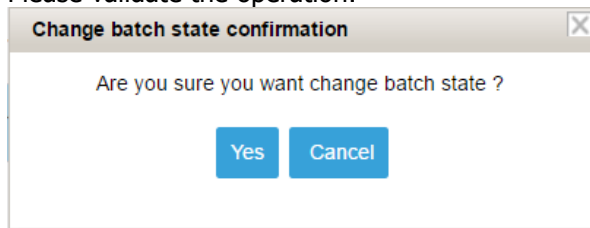
You cannot add new boxes / files in a closed Batch.

2.4 – Batch Validation

Lorsque l'archiviste est prêt à recevoir les boites déclarées dans ce lot, cliquez sur le bouton « Ouvrir / Envoyer ».

When Archivist is ready to receive declared boxes / files he clicks on "Open / Send" button:
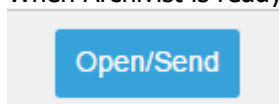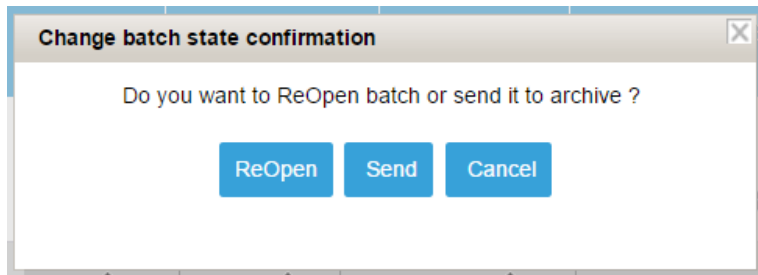
Then he validates this operation. If a Correspondant needs to add new boxes / files in the selected Batch, you can Reopen it by choosing the option.

Une fois cette opération effectuée, validez le lot à recevoir.
When the Batch is receivable, please click on « Validate » button :
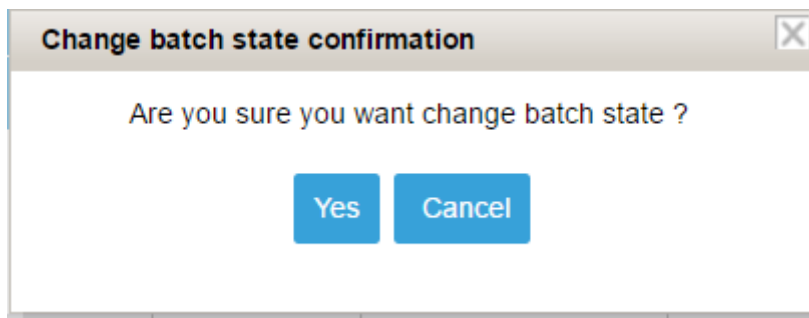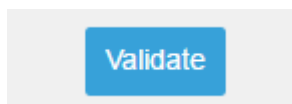
Batch is ready for boxes / files reception:

	BATCH2017	11/05/2017	Validated	Démo Archives	Direction gènèrale	Archives Administrateur	1	2	

2.5 – Receive Boxes or Files

2.5.1 – From Damaris RM online interface

Damaris RM shows all receivable Boxes / Files.

You can use filters to find specific items.

	Type: Documentation	Project : Damaris RM	Page 9 / 25

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Reception Type:	Boxes ▼	Company:	▼	Batch:	▼
Box Code:		Department:	▼	User:	▼

Reception Type:	Boxes ▼	Company:	▼	Batch:	BATCH2017 ▼
Box Code:		Department:	▼	User:	▼

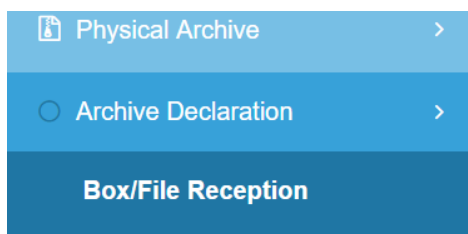| FILTER	RECEIVE	RECEIVE ALL	EXPORT PDF	EXPORT CSV	ADD TO DASHBOARD	

Page 1 of 1

Save Ordering   **List of Boxes (1-1 / 1)**   Remove Ordering

	Box Code ⬍	Company	Department	Last Name First Name
☐	1760434670608	Démo Archives	Direction générale	Archives Administrateur

Page 1 of 1

Please select one or several lines and click on "Receive" button.

You also can receive all receivable items (Boxes or files) by clicking "Receive All" button.

2.5.2 – Receive items by using Damaris Mobile Application

You can use Damaris Mobile Application to receive boxes or files by reading their barcode or entering their unique code in the App.
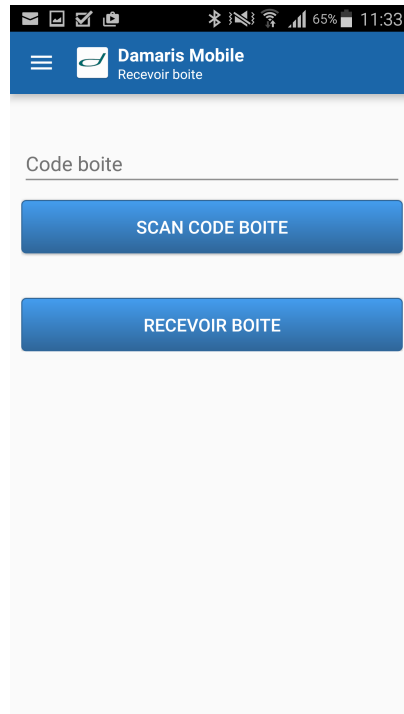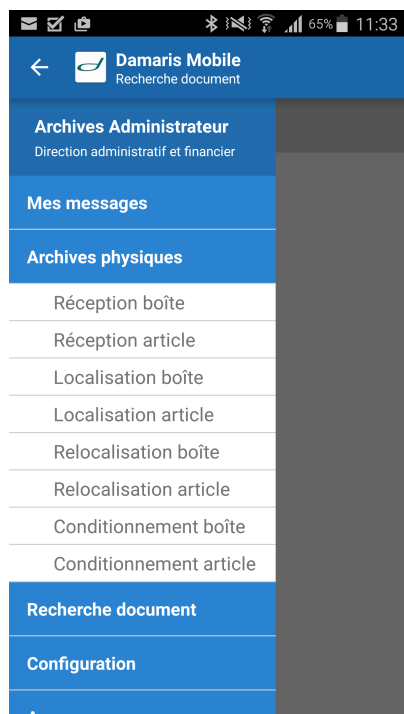
2.5.3 – Receive items by using barcode reader

You can use your barcode reader by selecting « Receive » function.
Please read the appropriate barcode on barcodes list and read each individual boxes / files barcodes.

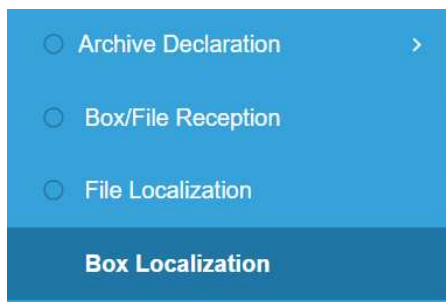Synchonize data with your server by using Damaris Clipbarcode software installed on your workstation.

2.6 – Boxes localization

Toute boite reçue peut être localisée. Il en est de même pour les articles reçus.

2.6.1 – From Damaris RM online interface

Sélectionnez le sous-menu approprié dans le menu Archives physique

Please select the appropriate function in

You can use information filtering to adapt hit list:

Please select the box to localize and click on "Localize" button.

FILTER	LOCALIZE	EXPORT PDF	EXPORT CSV	ADD TO DASHBOARD	

Save Ordering

List of Boxes (1-10 / 176)

	Box Code ⬍	Company	Department
☐	1234054541224	Wailly Conseil	Direction
☑	1026665646550	Démo Archives	Direction générale
☐	123456	Démo Archives	Direction générale
☐	12052	Démo Archives	Direction générale
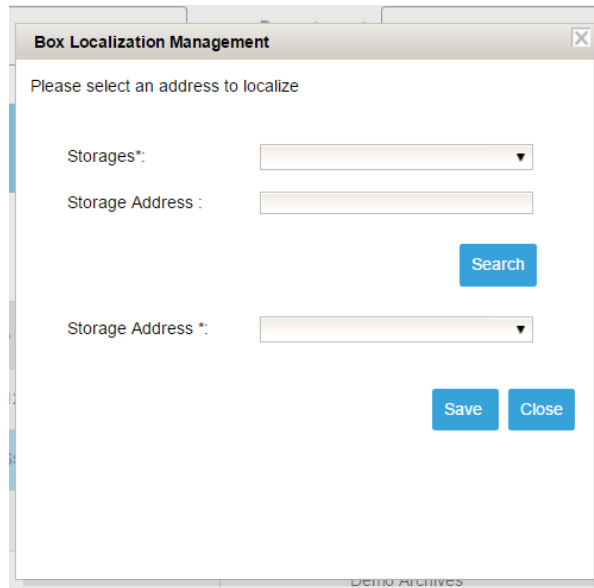
In this popup window please choose the storage area and the storage address.
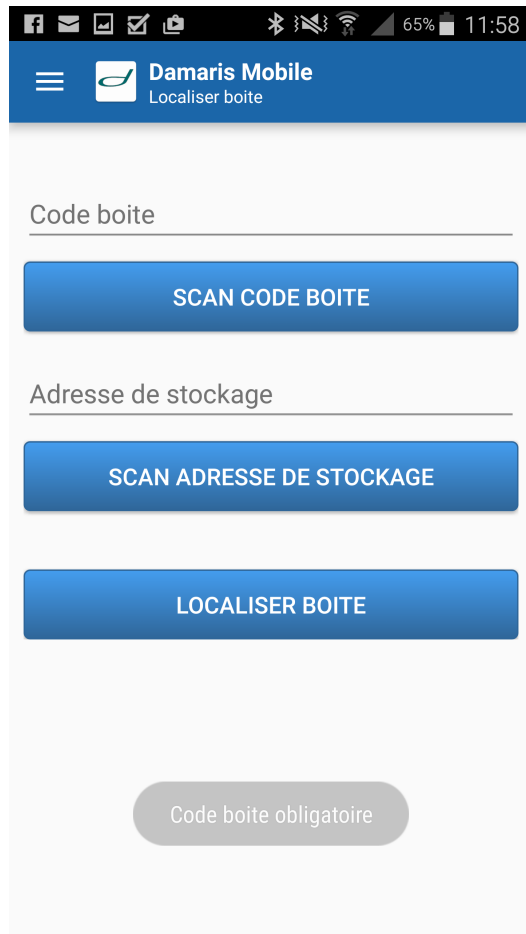Validate localization by using "Save" button.

2.6.2 – Localize with Damaris Mobile

Please select Box Localization menu.
Enter the unique box code or read the barcode.

Then, enter the storage address or scan address barcode.

Validate the operation.

2.6.3 – Localize with barcode reader

Please select "Box localization" by reading the appropriate barcode.

Then, read storage address barcode and one or multiple boxes barcodes on each shelf.

Synchonize data with your server by using Damaris Clipbarcode software installed on your workstation.

3 – Search and Request

This function is available for all authorized users.

Users can retrieve specific boxes or files by using search criterias.
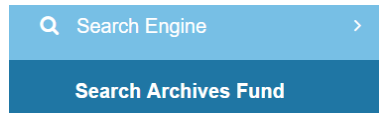
You can find the step by step Workflow:

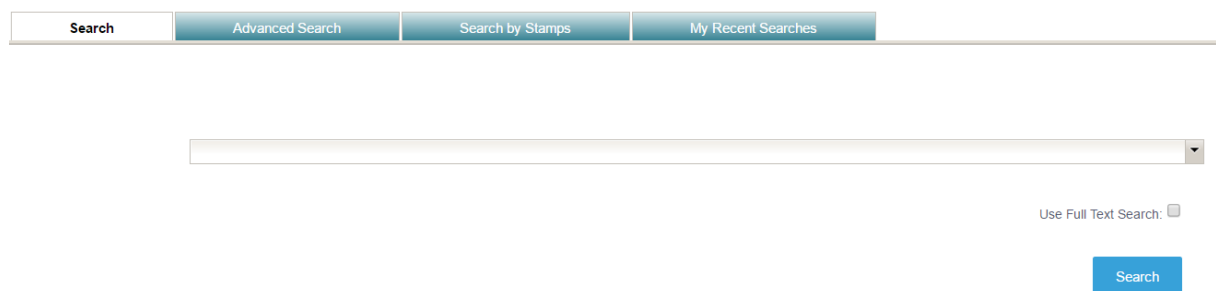| User	Archivist
Search • Simple • Advanced	
Request	

Request followup	

3.1 – Archives Fund Simple Search

User selects Search engine by using the following menu:

🔍 Search Engine	>
Search Archives Fund	

A similar window appears:

| Search	Advanced Search	Search by Stamps	My Recent Searches

Use Full Text Search: ☐

Search

Enter known information in the field and press "Search" button.
This approach will try to find any item box or file in the whole database and limited to authorized documnt types for connected user.

3.2 – Advanced Search

Please use "Search Engine / Search Archives Fund" menu.

Then select « Advanced Search » Tab.
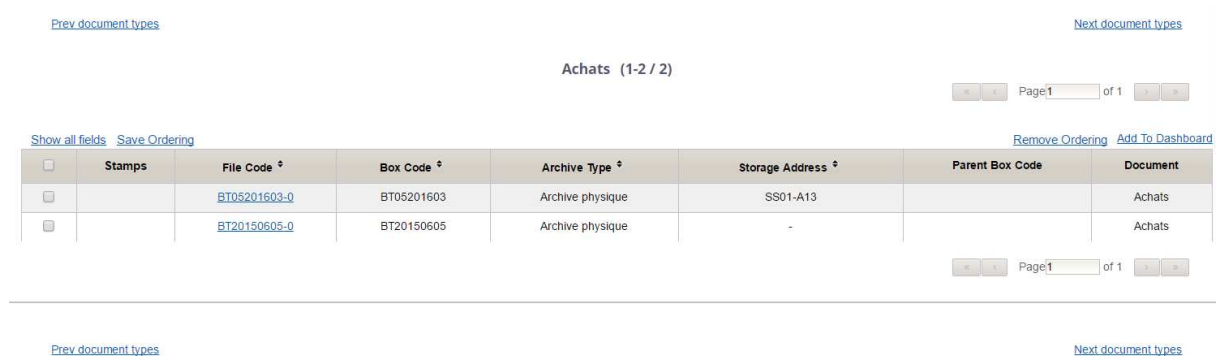
A similar window appears:
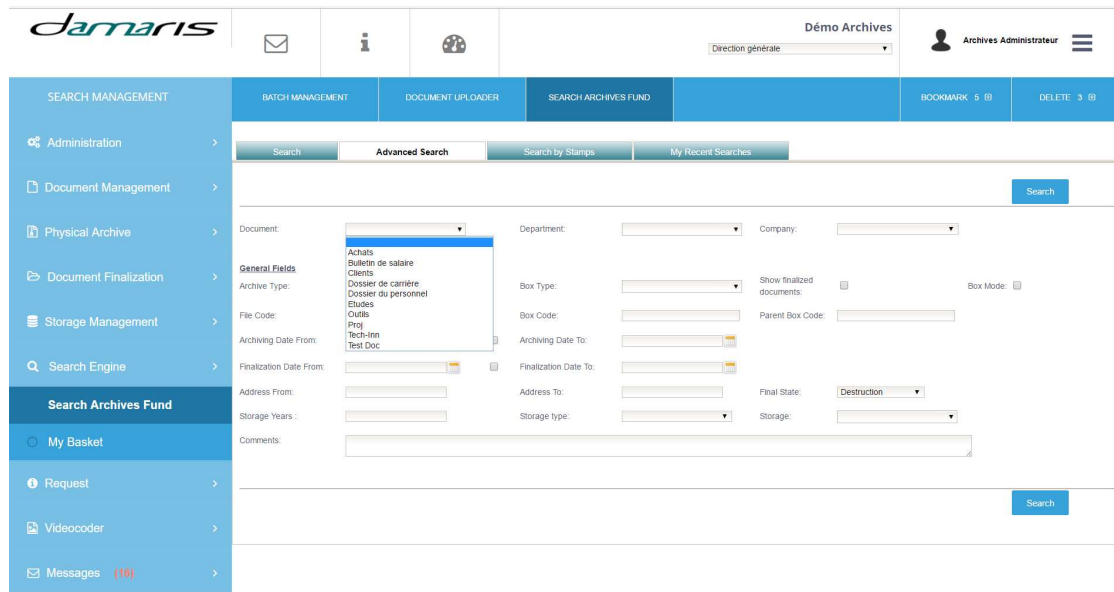
In "Document" listbox please select the target document type.
The window presents specific search criterias for that document type.

Enter known search criterias and click on "Search" button.

3.3 – Search Results hit list navigation
After search step, you will get results hit list.

A similar window appears:

You can navigate in the same document type results by using page numbers.

To change results page, please use left and right arrows.
You also can go directly to a given page by entering page number and clisk on ">" button.

If more than one document type is found, you will see document type navigation links at left and right sides of result list.

Prev document types   Next document types

...

Please use these links to change document type results list back and forth.

These navigation links appear only if more than one document type is found.

3.4 – Box or File Request
You can request archivist to get specific box or file from archives storage.
Please select the target item by clicking on first column link of search result list.

A similar popup window appears:

Please review and fill the following fields:
- Expected date
- Return date
- Request Reason istbox
- Request type listbox
- Requetser if different from you

And validate by clicking on "Save" button.

If you want the whole box containing the specific item, please check "Entire Box" checkbox.

You also can request more than one item at a time.
In that case, please select given items from search result list by using left side checkboxes, and launch the operation by clicking on "Request" button on top of your window.

Please fill the popup window as shown bellow and validate your request.

A confirmation message appears on top of the popup windiw.

The Requests has been created successfully.
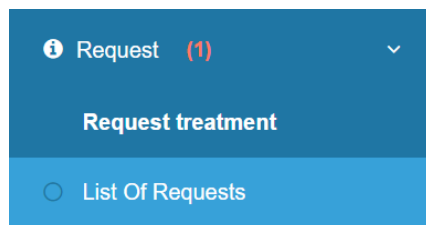
3.5 – Archivist's Request Processing
All requests are grouped in a unique list available for archivists.

Periodically, archivists have to verify this list and process requests.

To do so, please use « Request / Request Treatment » menu.

Utilisez le menu Demandes / Traitement des demandes pour accéder à la liste.
A red indicator give the number of non-processed requests.

Archivist can filter the requests list upon his needs:
- Request type
- Request status: To be processed
- User department

A similar list appears:

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You can use columns title to sort the result.

Pleasze select one or several lines and click on "Receive" button on top the page. This operation will generate one document for each request.

Please print document and use the first part as proof of delivery and the second part to replace the item you extract from archives storage.

Each document contain information about the item, its storage address and the user who requested it.

At the end of items picking, please use one of the following methods to validate the operation:
- In Damaris RM online interface change the status by using "Actions" menu
- With Damaris Mobile application by reading the item's barcode
- With barcode reader by using the appropriate function and by reading item's barcode
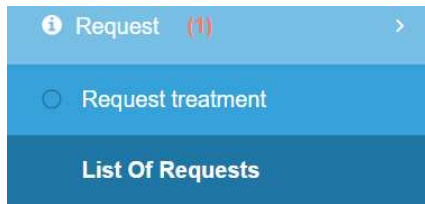
Here is an example of "Actions" menu:
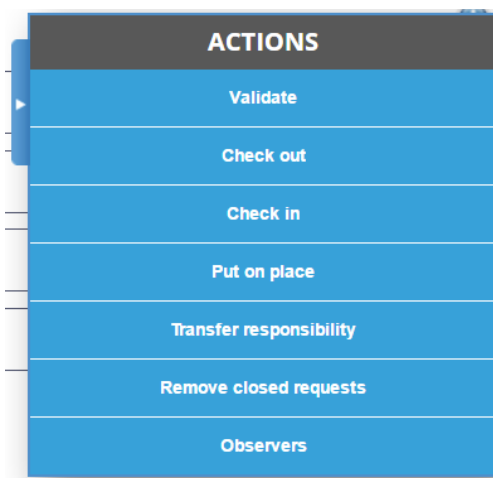
The following table lists all requets Status:

Status	Explanation
To be processed	Requests are ready to be processed When done, request passes at "To be validated"
To be validate	Archivist validates corrrectly pronted out documents
Marked for Checkout	Proof of deliveries are printed, and archivist is ready to pick up items from Stroage.
Checked out	Items are picked up and delivered to users
To be shelved	Items are returned to archivist from users and wait to be localized again in storage
Closed	Items returned back to their storage shelf.
On Hold	If multiple requests are aothorized for a unique item (Box or File), this step indicates that it is on hold waiting for its return back before processing for the next user

3.6 – Users Requests followup

Users can check list of their own requets for themselves or for all members of their department.
To do so, please use "Request / List Of Requests" menu.

Similar window opens:

	Box Code	File Code	Document	Storage address	Destination name	Request date	Expected date	Request status	Request type	Comments	Request reason	
☐	5452554655735	5452554655735-1	Achats	SS01-A14		14/04/2014	21/04/2014	To be Shalved				
☐	4380473634881	4380473634881-1	Achats	SS01-B14	Parfait Sanchez	01/07/2014	07/07/2014	On Hold		Attention pas le mercredi		
☐	1205	1205-1	Bulletin de salaire			15/04/2015	15/04/2015	To be Shalved				
☐	11111	11111-1	Bulletin de salaire		delachaise	15/04/2015	15/04/2015	To be Shalved				
☐	BT150516	BT150516-1	Achats	SS01-A14		16/05/2015	16/05/2015	To be Validate		Test demande de sortie		
☐		1234	Achats			16/05/2015	16/05/2015	To be Validate		Test demande		

L'utilisateur a la capacité d'appliquer des filtres pour retrouver plus facilement la ou les demandes qu'il recherche.

User can apply filters to limit the list. Generally used filters are:
- Company
- Departement
- Dates
- Request status
- Etc.

4 – Final State Management

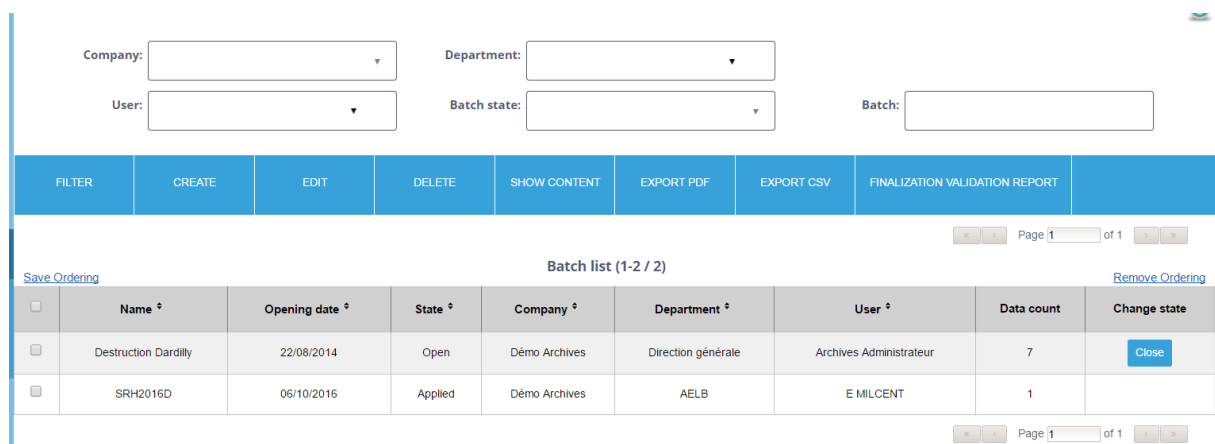Please find description of final state management Workflow.
Here archivist will create Final State Batches to logically group item to be processed. Grouping could be done by using Storage, Departement, Finalization year, etc.
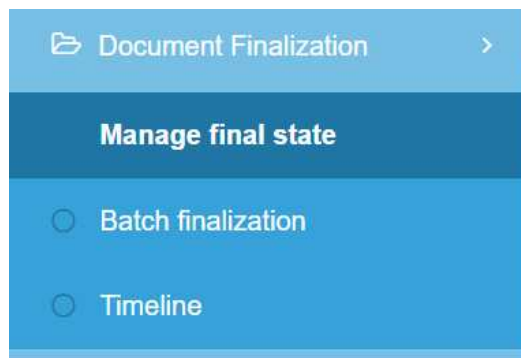
4.1 – Manage final state Batch

Please use "Documents Finalization / Manage final state" menu.
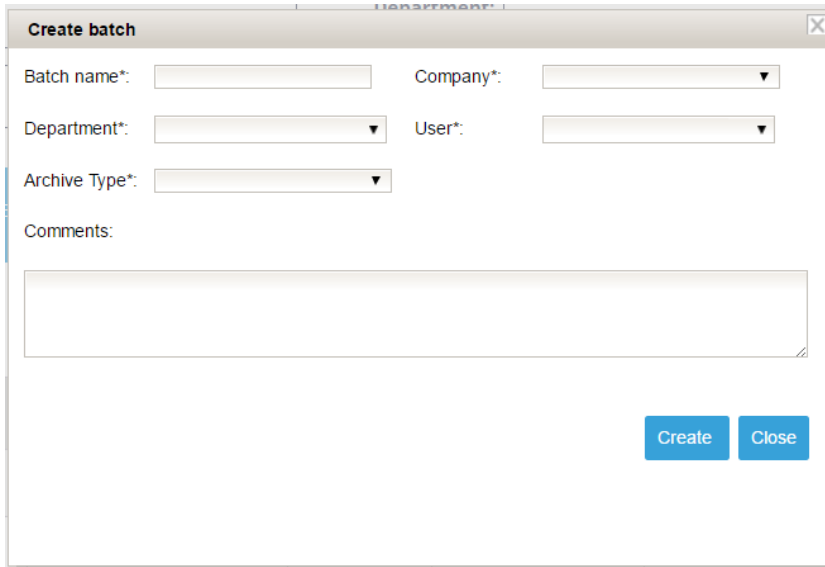
A similar window appears:

Name ⇕	Opening date ⇕	State ⇕	Company ⇕	Department ⇕	User ⇕	Data count	Change state
Destruction Dardilly	22/08/2014	Open	Démo Archives	Direction générale	Archives Administrateur	7	Close
SRH2016D	06/10/2016	Applied	Démo Archives	AELB	E MILCENT	1	

Please click on "Create" button to start a new Batch.

A similar window appears:

Please enter data for the following fields:

- Batch name
- Company (If multiples companies)
- Department
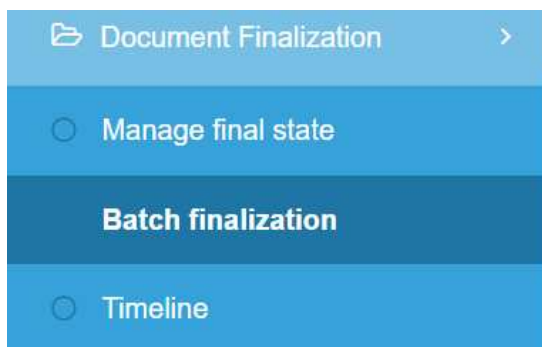- Archive type, physical or electronic

You can also add a comment to help future users about this specific batch.

Confirm batch creation by using "Create" button.

Batch list is then updated.

4.2 – Batch filling

Please use « Batch finalization » menu to pick up item to be finalized.

A similar window appears:

	Type: Documentation	Project : Damaris RM	Page 21 / 25

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Please choose the batch from listbox and Final State you want to process.

If you select "Finalization date checkbox" you can pick up items even if their finnbalization date is not over. Please be careful using this option because you could destroy items which you need to hold.

Then click "Next" button.

You can now launch several search processes to find items (Boxes or Files) and fill your batch.

If you check "Box Mode" option, your search list indicates only boxes where all files are ready to be finalized.

In result list please select items you want to add to the Batch.

If users decide to hold selected items not to be finalized, you can remove them from Batch's list.

4.3 – Apply Final State
When the Batch list is created and you have users acceptance, you can then apply the final state operation.

To do so, please go to « Document Finalization / Manage final state » menu.

Find the Batch and click on « Close » button right side of the list.
After validation, the state passes to "Closed".

Please click on "Open/Validate" button to continue the process.
You get a similar popup:
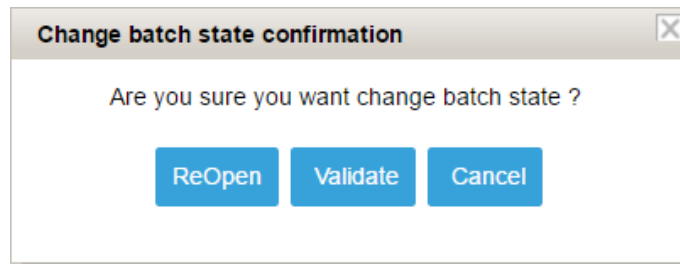
NOTE : This is the last step before definitly close the batch. After this validation, you can no more reopen the batch.

- Batch passes to "Validated" step

- Please use **Confirm** button to launch next finalization step

- ▪ Batch is then Confirmed

- ▪ Please click on **Apply** button to go one step further

Note : You will get a specific message on top of the window, validating the operation.

Note: Please find a sum up of all Finalization Batch States:
- Open: Archivist can add or remove items in the Batch list
- Closed: Batch is ready to be finalized
- Validated: Archivist is ready to pick up items from storage
- Confirmed: Archivist picked up all items from storage
- Applied: Database is updated, storage faciility is updated, spaces are usable again

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5 – Quality Control

Damaris RM provides data quality control engine which ensures data quality keyed in by users.

You can configure quality control on index values or on File Code and Box Code values also.
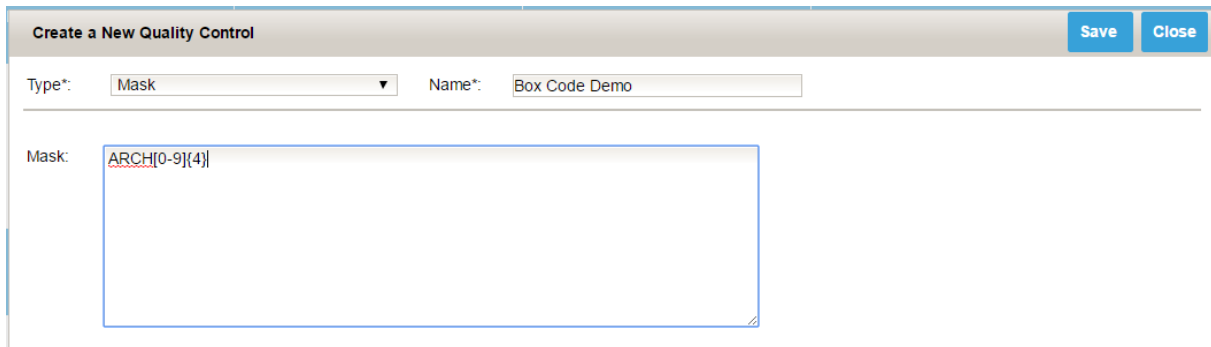
5.1 – File Code and Box Code Quality control

You can define right information format for these two fields.

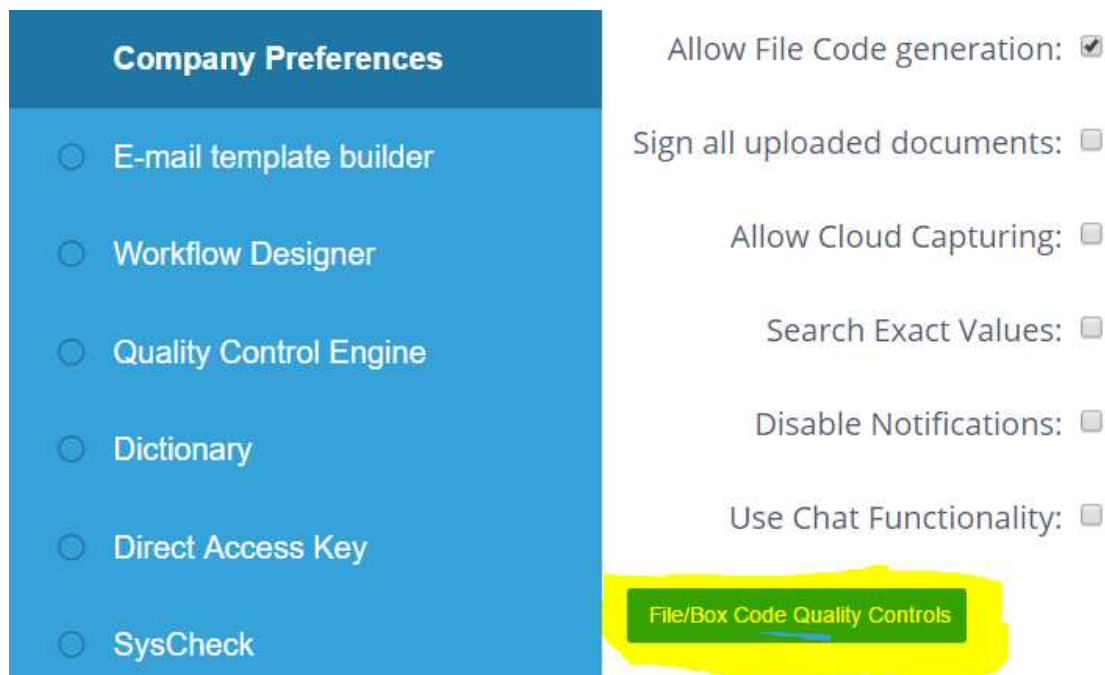For example, you can define a prefix value like "ARCH" followed by 3 or 4 numeric digits.

This option is defined at Company level.
Please go to "Administration / Qualty Control Engine" menu and "Administration / Company Preferences".

In Quality Control Engine menu, you will define specific controls by creating a configuration for each field.

Then, please go to "Company Preferences" menu to choose the quality control for each field.

Please click "File/Box Code Quality Control" button.

In the next popup, you will invited to define which quality control you want to use for File Code or Box Code fields.

If you check "Required" option, this quality control becomes mandatory. If user doesn't follow the requirments then he cannot enter data. If this option is not set, then a warning message appears but user can validate his data entry.

5.2 – Search Criteria Quality Control

You also can add quality control for specific fields linked to a document type:
- You can add controls on a value entered for a given field (Index)
- You also can use already configured controls in Quality Control Engine menu

For example, to define a mandatory field, please go to "Document Management / Document" menu:
- Select the document type you want to configure
- Click on "Edit" button
- Please retrieve the field in "Search Criteria" list

- At the far right part of the list, please click on "Quality Control" icon
- In the popup window please select "Non Empty" option in Quality Control
- Please check the "Required" option if needed
- Validate your configuration by clicking on "Save" button

- You can configure quality controls for other Search criterias
- Please click on "Edit" button in document type popup

You successfuly configured quality control for this document type. You can continue for other ones if necessary.