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Version	Author : modifications	Date
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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



9 chemin du Jubin 69570 Dardi	Type: Doo	Cumentatio Al	n Pro Chives p Damar Users N Departme Batch sta	<sub>ject : Damaris R</sub> Dhysique is RM /anual	<u>M</u> S	Page	3/25
FILTER	EDIT DEL	.ETE PL	IRGE BATCH DE				
Name +	Opening date +	State ‡	Company <sup>‡</sup>				
Annuel2014	15/01/2014	Received	Démo Archives				
Annuel_140416	16/04/2014	Received	Démo Archives				
Mensuel_Mai2014	02/05/2014	Received	Démo Archives				
3atch name*:		Company: Jser:	Démo Archives Archives Admini	strateur ate Ciose			
Create batch				X			
Batch name*: BATCH2017	C	company:	Démo Archives	ł			
Department*: Direction gén	iérale 🔻 U	lser:	Archives Admini	strateur			
Comments:			Сгеа	te Close			
0/04/2014 RECEIVED	Demorarchives		Direction gener	une			_

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# 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:

Actions Archiving of Boxes Archiving of Files Archiving of multi-boxes	
Archiving of boxes Batch*:	Add Close
Parent box codes:   Box Code*:  Declaration date: 11/05/2017  Storage years*:  Comments:	
	Generate barcodes

Please choose your Batch, your document type, and other fields describing your new box / file:

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Archiving of boxes			Add	Clos
Batch*: BATCH2017	Document*: Achats			
Box Type*: Boite 10	▼ Final state*. Destruction ▼			
File Code: 1760434670608-1				
Parent box codes:	▼ Box Code* 1760434670608	Generate		
Declaration date: 11/05/2017	Storage years*: 10			
Comments:				
		h		
Indexes:				
Fournisseur début				
Fournisseur fin				
Date début				
Data da fin				

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.

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Archive Cancel	
Company* :	Démo Archives 🔻
Document type* :	Achats •
Archive Type* :	Archive physique
<u>Index List:</u>	
Fournisseur début:	
Fournisseur fin:	
Date début:	
Date de fin:	
Exercice:	0
N° de facture:	٩
Batch* :	T
Final state* :	۲
Box Type* :	T
File Code* :	Generate
Box Code :	Generate
Parent box codes :	۲
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.





# 2.3 –Batch Closing

9 chemin du Jubin 69570 Dardilly	Type: Document	Page 7 / 25	
Physical Archive			
<ul> <li>Archive Declaration</li> </ul>	*		
Batch managem	lent		
Search Declaration	ons		

To find the right Batch, you can use filter existing batches:

	c	ompany:			• Dep	oartment:		•				
		User:			Ва	tch state:		Ŧ	Batch nam	e:		
	FILTER	CREATE	EDIT	DELETE	PURGE BATCH	DEACTIVATE	SHOW PASSIVES	SHOW CONTENT	EXPORT PDF	EXPORT CSV	BATCH VALI	DATION REPORT
F	Please	select th	ne Bato	h by cheo	king the	line:				1		
		0.700.0017				of						

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:

Change batch state	e confirr	mation		×
Are you sure	e you wa	nt change l	batch state ?	
	Yes	Cancel		

You cannot add new boxes / files in a closed Batch.

### <u>2.4 – Batch Validation</u>

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:



Janaris	Type: Documentation	Project : Damaris RM	Page 8 / 25
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Change batch sta	te confirmat	tion			X
Do you wa	ant to ReOpe	en batch o	r send it to a	archive ?	
	ReOpen	Send	Cancel		
					5

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 générale	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.

9 chemin du Ju	bin 69570 Dardilly	Type: Doc	Type: Documentation       Project : Damaris RM         Archives physiques       Damaris RM         Users Manual       Users Manual				
Reception Type: Box Code:	Boxes	Ÿ	Company:	•	¥	Batch:	•
Reception Type: Box Code:	Boxes	*	Company:	•	] Bat	ch: BATCH2017	· ·
FILTER	RECEIVE	RECEIVE ALL	EXPORT PDF	EXPORT CSV	ADD TO DASHBOAR	D	
Save Ordering			List	of Boxes (1-1 / 1)		x	Page 1 of 1      Page 1     Remove Ordering
	Box Code ¢		Company	Department		La	ist Name First Name
	1760434670608		Demo Archives	Direction générale		Ar	cnives Administrateur

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.

◼☑ё ≯≋≋;⋧,	65% 🛑 11:33		🖆 🛛 😽 🕅 🛜 📶 65% 🛑 11:33
← <i>O</i> <b>Damaris Mobile</b> Recherche document			Damaris Mobile Recevoir boite
Archives Administrateur Direction administratif et financier		Code bo	ite
Mes messages			
			SCAN CODE BOITE
Archives physiques			
Réception boîte			
Réception article			RECEVOIR BOITE
Localisation boîte			
Localisation article			
Relocalisation boîte			
Relocalisation article			
Conditionnement boîte			
Conditionnement article			
Recherche document			
Configuration			
A propag			

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### 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.

<u>2.6 – Boxes localization</u> 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 DA	SHBOARD	
Save Ordering			Lis	t of Boxes (1-10 / 1	76)	e c
	Box Code <sup>¢</sup>		Com	pany		Department
	1234054	4541224	Wailly	Conseil		Direction
2	1026665	1026665646550		Archives		Direction générale
	123456		Démo A	Archives		Direction générale
	120	12052		Archives		Direction générale

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Box Localization Managem	X
Box Localization Manager	
Please select an address to	localize
Storages*	
Storage Address :	
	Search
Storage Address *:	T
	Save Close
1	
	Demo Archives

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.

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		Damaris RM	
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	ً 11·58 <b>ي</b> ا		
— A Damaris Mobi			
Localiser boite			
Code boite			
SCAN CODE	BOITE		
Adresse de stockage			
SCAN ADRESSE D	E STOCKAGE		
LOCALISER	BOITE		
Code boite ob	ligatoire		

### 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	

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```
Request followup
```

### <u>3.1 – Archives Fund Simple Search</u>

User selects Search engine by using the following menu:

Q Searc	h Engine	>	
Searc	h Archives Fund		
A similar v	vindow appears:		
Search	Advanced Search	Search by Stamps	My Recent Searches

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.

## <u>3.2 – Advanced Search</u>

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

Then select « Advanced Search » Tab.

A similar window appears:

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Jamarıs		i				Direction g	Dém	o Archives	Archives Adm	ninistrateur
	BATCH MANAGEN	ENT	DOCUMENT UPLOADE	R SEARCH ARCH	IVES FUND				BOOKMARK 5 (B	DELETE 3 88
	Search	Advanc	ed Search	Search by Stamps	N	ly Recent Searches				
										Search
	Document:	Achats	•	Department:		٠	Company:		•	
	General Fields Archive Type:	Bulletin de salair Clients Dossier de carri Dossier du perse	re êre onnel	Box Type:		٠	Show finalized documents:		Box Mode: (	
Storage Management	File Code: Archiving Date From	Etudes Outils Proj Tech-Inn		Box Code: Archiving Date To:		-	Parent Box Code:			
	Finalization Date From:	ica boo		Finalization Date To:						
Search Archives Fund	Address From: Storage Years :			Address To: Storage type:		Ŧ	Final State: Storage:	Destruction	•	
<ul> <li>My Basket</li> </ul>	Comments:								2	
										Search
Messages (10)										

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.

# <u>3.3 – Search Results hit list navigation</u>

After search step, you will get results hit list.

A similar window appears:

Remove Ordering Add           Stamps         File Code *         Box Code *         Archive Type *         Storage Address *         Parent Box Code         Doc           BT05201603-0         BT05201603         Archive physique         SS01-A13         Doc         Doc         Doc	Tex detailed (1963	Dex		Achats (1-2 / 2)		N Page 1	of 1
BT05201603-0 BT05201603 Archive physicile SS01-A13	w all fields Save Orde Stamps	e Ordering Ds File Code <sup>\$</sup>	Box Code *	Archive Type *	Storage Address *	Remove Ord Parent Box Code	ering Add To Dashi Document
	J	BT05201603-0	BT05201603	Archive physique	SS01-A13		Achats
BT20150605-0 BT20150605 Archive physique -		BT20150605-0	BT20150605	Archive physique	5		Achats

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.

Page 1	de 2	>	Х

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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.

Stamps	File Code <sup>‡</sup>	Box Code +	Archive Type *	Storage Address
	BT05201603-0	BT05201603	Physical archive	SS01-A13
	BT20150605-0	BT20150605	Physical archive	-

A similar popup window appears:

Request Manag	jement						Save	Clos
			Acha	ts				
File Code	Box Code	Archive Type	Storage Address	Parent Box Code	Document	Company		Dep
BT05201603-0	BT05201603	Physical archive	SS01-A13		Achats	Démo Archives	Direction	admi
4								•
Expected Date*:	12/05	/2017	Return	Date*:	12/	08/2017		
Reques <mark>t R</mark> eason		٣	Reques	st type*:				T
Entire Box:			Reques	ster:				
Comments:								
							2	

Please review and fill the following fields:

- Expected date
- Return date
- Request Reason istbox
- Request type listbox
- Requetser if different from you

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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:

9 chemin du	Jubin 695	70 Dardilly	Type: D	ocumentation Arc	hives Dama Users	Project : Dam physic aris RN Manua	aris RM QUES 1 21			Page 17 / 2	5
Company	y:		v	Department:		٠	Requ	est From:			]
Request statu	s: To be p	rocessed	Ŧ	Storage:			Re	quest To:			
Requeste	r:			Request type:			• Retu	Irn From:			
File Code	e:			Request Reason:			v R	eturn To:			
Closed	#										
FILTER	RECE	VE	PRINT	EXPORT PDF EX	KPORT CSV	ADD TO DASHBOARI	>				
							List Of Reque	ests (1-1 / 1)	Page	1 of 1	æ
Box Code +	File Code ‡	Document *	Storage address	Destination name *	Request date +	Expected date *	Request type *	Comments *	Request reason *	Page number *	Return d
Henner001	Henner001-2	Etudes			12/05/2017	12/05/2017	Request update from applicant		End of Exam	1	12/08/2
									Page	1 of 1	

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:

	(F) (1)
ľ	ACTIONS
•	Validate
-	Check out
_	Check in
	Put on place
	Transfer responsibility
_	Remove closed requests
	Observers

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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

 $\frac{3.6-Users\ Requests\ followup}{Users\ can\ check\ list\ of\ their\ own\ requets\ for\ themselves\ or\ for\ all\ members\ of\ their\ department.}$ To do so, please use "Request / List Of Requests" menu.



### Similar window opens:

Compan	y:	,	, Departm	nent:	•	,	Request From:		]
Request statu	s:	,	, Stor	rage:	•	,	Request To:	_	]
Requeste	r:		Request t	:ype:		Ŧ	Return From:		]
File Code	e:		Request Rea	ison:		Ŧ	Return To:		]
FILTER		CANCEL		EXPORT PDF	EXPORT CSV				
								< Page 1 of 3 >	»
Save Ordering						Lis	st Of Requests (1-10 / 2	27)	

Jav	e ordening											
	Box Code <sup>‡</sup>	File Code <sup>‡</sup>	Document <sup>¢</sup>	Storage address <sup>¢</sup>	Destination name +	Request date <sup>¢</sup>	Expected date <sup>+</sup>	Request status ¢	Request type +	Comments <sup>¢</sup>	Request reason <sup>¢</sup>	1
	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		

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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.

Construction Document Finalization	>
Manage final state	
<ul> <li>Batch finalization</li> </ul>	
O Timeline	

### <u>4.1 – Manage final state Batch</u>

Please use "Documents Finalization / Manage final state" menu.

A similar window appears:

	Company	:		Depart	ment:		,			
	User	:	•	Batch	state:		v	Batch:		
	FILTER	CREATE	EDIT	DELETE	SHOW CONTENT	EXPORT PDF	EXPORT CSV	FINALIZATION VALIE	DATION REPORT	
Save (	Ordering				Batch list	(1-2 / 2)		ĸ	Page 1	of 1 > >
	Nar	ne ‡	Opening date <sup>‡</sup>	State <sup>‡</sup>	Company <sup>\$</sup>	Department <sup>‡</sup>		User <sup>‡</sup>	Data count	Change state
	Destructi	ion Dardilly	22/08/2014	Open	Démo Archives	Direction général	e Archive	s Administrateur	7	Close
	SRH	2016D	06/10/2016	Applied	Démo Archives	AELB	E	MILCENT	1	
								<	< Page 1	of 1 > »

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

A similar window appears:

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	1101	aartment.		
Create batch				X
Batch name*:		Company*:		V
Department*:	۲	User*:		Ţ
Archive Type*:	T			
Comments:				
			Create	Close

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:

Jamaris	Type: Documentation	Project : Damaris RM	Page 21 / 25
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	L	Jsers Manual	
Batch:*	v User:	•	
Final state* :	v Destination:	Finalization date check box:	

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.

Search	Advanced Search	Search by Star	nps My Recent Searches	5		
						Search
2						
Document:	•	Department:		Company:		·
General Fields				Show finalized		
Archive Type:	<b>T</b>	Box Type:		documents:		Box Mode:
File Code:		Box Code:		Parent Box Code:		
Archiving Date From:		Archiving Date T	D:			
Finalization Date From:		Finalization Date	To:			
Address From:		Address To:		Final State:	Destruction •	
Storage Years :		Storage type:	T	Storage:		r -
Comments:						
						A
·						
						Search

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".

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	FILTER CREATE	EDIT	DELETE	SHOW CONTENT	EXPORT PDF	EXPORT CSV	FINALIZATION VA	LIDATION REPORT	
	Page 1								of 1 > >>
Save	Ordering			Batch li	st (1-3 / 3)				Remove Ordering
	Name <sup>‡</sup>	Opening date <sup>‡</sup>	State <sup>‡</sup>	Company <sup>‡</sup>	Department <sup>‡</sup>		User <sup>‡</sup>	Data count	Change state
	Destruction Dardilly	22/08/2014	Open	Démo Archives	Direction générale	Arc	hives Administrateur	7	Close
	SRH2016D	06/10/2016	Applied	Démo Archives	AELB		E MILCENT	1	
	FINAL STATE Batch 2017	12/05/2017	Closed	Démo Archives	Direction des opération	ons Arc	hives Administrateur	0	Open/Validate
								« C Page 1	of 1 >>>

Please click on "Open/Validate" button to continue the process. You get a similar popup:

Change ba	Change batch state confirmation										
Are you sure you want change batch state ?											
	ReOpen	Validate	Cancel								

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 button to launch next finalization step

	Batch state successfully changed validate to confirmed.										
	Compan	y:	Ŧ	Departr	nent:		,				
	Use	ir:	•	Batch	state:		Ŧ	Batch:			
	FILTER	CREATE	EDIT	DELETE	SHOW CONTENT	EXPORT PDF	EXPORT CSV	FINALIZATION VALIDAT	ION REPORT		
								æ	< Page 1	of 1 >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	
Save	Ordering				Batch list	(1-3 / 3)				Remove Ordering	
	I	Name <sup>‡</sup>	Opening date ‡	State ‡	Company ÷	Departmen	t ÷	User <sup>‡</sup>	Data count	Change state	
	Destr	uction Dardilly	22/08/2014	Open	Démo Archives	Direction gén	érale	Archives Administrateur	7	Close	
	s	RH2016D	06/10/2016	Applied	Démo Archives	AELB		E MILCENT	1		
	FINAL S	TATE Batch 2017	12/05/2017	Confirmed	Démo Archives	Direction des op	érations	Archives Administrateur	0	Apply	
								ď	< Page 1	of 1 >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	

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- Batch is then Confirmed
- Please click on

button to go one step further

-			applied.	nged confirmed to	ite successfully cha	🦋 Batch sta			
					nent:	Departr	٧	Company:	
		Batch:	v		state:	Batch		User:	
	TION REPORT	V FINALIZATION VALIDA	EXPORT CSV	EXPORT PDF	SHOW CONTENT	DELETE	EDIT	TER CREATE	FI
of 1	Page 1			(1-3 / 3)	Batch list				
of 1 Remove Ordering	Page 1 Data count	User <sup>‡</sup>	t+	(1-3 / 3) Departmen	Batch list Company *	State +	Opening date ‡	dering Name <sup>e</sup>	ave Or
of 1 2 2 2 Change state	Page 1 Data count 7	User * Archives Administrateur	t÷ érale A	(1-3 / 3) Departmen Direction géne	Batch list Company * Démo Archives	State * Open	Opening date * 22/08/2014	dering Name <sup>e</sup> Destruction Dardilly	ave Or
of 1 Parameters of 1 Parameter	Page 1 Data count 7 1	User <sup>e</sup> Archives Administrateur E MILCENT	t e érale A	(1-3 / 3) Departmen Direction génu AELB	Batch list Company * Démo Archives	State + Open Applied	Opening date <sup>9</sup> 22/08/2014 06/10/2016	Destruction Dardilly SRH2016D	ave Or

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

BATCH MANAGEMENT	DOCUMENT UPLOADER			BOOKMARK 5 🗄	DELETE 3 🕀
		Batch state successfully cha	nged confirmed to applied.		<u>0</u>
Company:	Ŧ	Department:	•		
User:	T	Batch state:	v Batch:		

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

# 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.

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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.

Create a	New Quality Control				
Type*:	Mask	T	Name*:	Box Code Demo	
Mask:	ARCH[0-9]{4}				
	CITERITO ALCH				

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.

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Quality Control			Close
Field*: Type: All	▼ Quality Control*: Date	▼ Required:	Add
Field	Quality Control	Required	Delete
File	Box Code Demo		<b>*</b>

### 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

- QUALITY CONTROL
- 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

Quality Control				ive Close
Type: All ▼ Quality Control*: Non Empty ▼ Required:  Add				
Туре	Quality Control	Required	Load Index Values	Delete
	Non Empty	<b>~</b>		1
		· · · · · · · · · · · · · · · · · · ·		<u> </u>

- 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.