



## E-Records System

### Information Specialists Ltd (Infospecs)

The E-Records System is designed by Information Specialists Ltd, using the latest functionality of Inmagic® DB/TextWorks™. It has been developed to provide a solution for the management of paper-based records, including the classification system, files and storage boxes.

E-Records comprises three DB/TextWorks databases - Classification, Files and Boxes. A Menu screen provides shortcuts to processes managed by the databases.

#### Classification database

- Contains all classification categories and controls the file classification process.
- Includes retention and disposal information for files created in each classification.
- Accommodates up to three classification levels.
- Each record represents a classification category and includes the classification code.
- Enables a generic classification category to differentiate administration and subject files.
- Provides views of the classification hierarchy.

#### classification report

##### AD 01 00 Administration - General

Retention and disposal: 5 years onsite: 5 years offsite: Retain.

Classification status: Open

##### AD 02 00 Administration - Property Management

Retention and disposal: 5 years onsite: 5 years offsite: Retain.

Classification status: Open

##### AD 02 01 Administration - Property Management - Buildings

Retention and disposal: 5 years onsite: 2 years offsite: Destroy.

Classification status: Open

#### Files database

The Files database contains descriptions of the files that have been created. Each record captures information about a file volume, including its classification, name, volume number, location, date opened and closed, review dates and subject metadata.

Retention and disposal information from the associated classification records is used to automatically generate transfer and disposal dates for files.

The Files database also captures lending information so that files can be checked out, overdue notices emailed, and reports of current loans automatically produced.

(continued)

## File textbase

- Retention and disposal information from the classification automatically populates file records, but can be edited if required.
- Offsite transfer and disposal dates are automatically calculated.
- Query screens enable free text or field specific searching for easy retrieval of files.
- Menu shortcuts automatically produce file list reports, disposal and transfer reviews.
- Menu shortcuts produce reports of current loans sorted by borrower and date.
- Reserves for an item can be registered by adding names to the waiting list.

The screenshot shows a web-based interface titled "create or edit file records". At the top left is a "Return to menu" button. The main form is divided into sections:

- File classification code:** A text box containing "AD 03 03".
- Classification information:** A list with three levels: "Level 1: Administration", "Level 2: Utilities", and "Level 3: Air conditioning".
- Retention information:** A table with three columns: "5 years onsite", "0 years offsite", and "Retain".
- File name:** An empty text box.
- File number:** An empty text box.
- Volume number:** An empty text box.
- Create unique file ID:** A button.
- File ID:** A large text box with a scroll bar, currently empty.

## Boxes database

The Boxes database identifies the location of the storage boxes that inactive files have been transferred to, and also identifies the dates when boxes have been temporarily retrieved from storage. The Menu shortcuts enable users to automatically produce reports of box contents and box locations, and to identify boxes that are currently retrieved from storage.

- Create box records
- Track boxes retrieved and returned to storage
- Search for boxes and box content
- List boxes by storage location
- Calculate number of boxes at each location
- Report boxes currently out of storage



Information Specialists Ltd. 25 Jervois Road, Ponsonby, Auckland, New Zealand .  
tel 9 361-2059 fax 9 361-2089 info@infospecs.co.nz www.infospecs.co.nz