


Filing rPCRs in iRIMS


January 2006

rolling Project Completion Reports (rPCRs) are filed in iRIMS project folders. Using iRIMS will allow staff to keep track of rPCRs and retrieve them.

→ Creating your Favourites:

Start in the 'Consolidated View' page of iRIMS Web at <http://irims.idrc.ca>.

Projects in your PI/ Sec't/ Corp. Project:	Projects not in your PI/ Sec't/ Corp. Project:
<p>Step 1 -  Click on the 'Saved Searches' icon and select your program's 'favourites'.</p> <p>Step 2 - Select the project folder you want to add to your favourites by checking the box at the left side of the folder.</p>	<p>Step 1 - In the 'Search in' field, drop down to 'Folder Number' and in the next field enter the project number as; '*XXXXXX*', click on 'Go'.</p> <p>Step 2 - To select the project folder, look for the yellow folder symbol in the 'Type' column, the 'Folder Number' (232-01-02-XXXXXX), and 'ELECTR' in the 'Author/Location' column, check the box at the left side of the folder.</p>

Step 3 -  Click on the 'Add to favourites' icon.

NOTE: If you cannot find the project folder or if you are filing an rPCR for a non-funded activity, send an email request to open the project folder to records@idrc.ca.

→ Filing a rPCR

Step 4 - With your rPCR open in Word, click on "File" and then select 'Save As'

Step 5 - From the 'Save In' drop down menu, select 'iRIMS Filing Bin'

Step 6 - Double-click on the project folder (either 232-01-02-XXXXXX or 232-01-XXXXXX)

→ OPTION 1: Filing a Stage 3 rPCR Transcript

This option is to be used for projects that required **only the stage 3 interview**.

Step 7 - Enter the file name as 'rPCRXXXXXXstage3.doc' and click on 'Save' (XXXXXX is the project number). The 'iRIMS – Document Details' window will open.

Step 8 - "Details" tab:

- Document Date & Date Received: the date when the interview was conducted
- Originator: complete name of the interviewee (e.g., Laurent Elder)
- Establishment: leave blank
- Subject: enter the title as '*project number* - Project Completion Report of *project title* - Stage 3'
- Addressee, Sent To & Description: leave blank

Step 9 - 'Additional Details' tab:

- Official: only check as 'official' if you are filing the **final** version of the stage 3 interview transcript after it has been reviewed and approved by the interviewee (only the system administrator can modify an official document)
- Document Security: UNC
- Language: indicate whether the rPCR was completed in French or English
- Document Type: PCR
- Origin: INT

Step 10 - click on 'Submit' at the bottom of the window.

➔ **OPTION 2: Filing a Stage 1 rPCR Transcript**

This option is to be used for projects that were selected to receive **all 3 stages of interviews**.

Step 7 - Save stage 1 rPCRs by entering the file name as 'rPCRXXXXXXstages123.doc' and click on 'Save' (XXXXXX is the project number). The 'iRIMS – Document Details' window will open.

Step 8 - 'Details' tab:

- Document Date & Date Received: date when the interview was conducted
- Originator: complete name of the interviewee
- Establishment: leave blank
- Subject: enter the title as '*project number* - Project Completion Report of *project title* – Stage 1' (note: see Step 11 for saving stages 2 and 3)
- Addressee, Sent To & Description: leave blank

Step 9 - 'Additional Details' tab:

- Official: do **not** check the stage 1 rPCR as 'official' (permission from the system administrator is required to modify an official document)
- Document Security: UNC
- Language: indicate whether the rPCR was completed in French or English
- Document Type: PCR
- Origin: INT

Step 10 - click on 'Submit' at the bottom of the window

➔ **OPTION 2 continued: Filing a Stage 2 or 3 rPCR Transcript**

In order to conduct the stage 2 or stage 3 interviews, the rPCR document with the transcript from stage 1 must be retrieved from iRIMS.

Step 11 - Create a folder called 'Check Out' under 'My Documents'

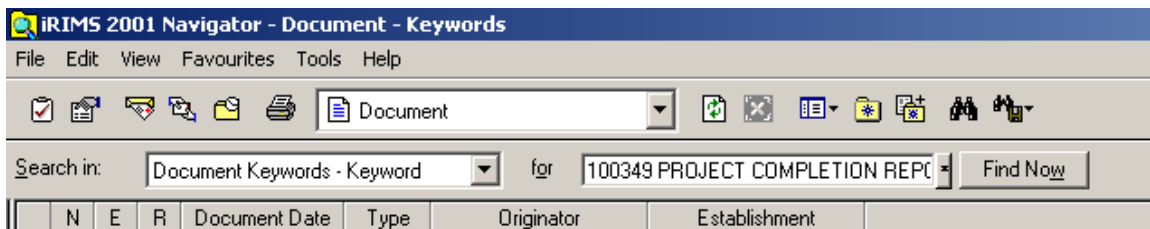


Step 12 - From your desktop click on 'iRIMS' (not the web access)

Step 13 - From the drop down list at the top of the page, select 'Document'

Step 14 - In the 'Search in:' drop down list select 'Document Keywords - Keyword'

Step 15 - Enter '*project number* Project Completion Report' as keywords in the blank field and click 'Find Now'



Step 16 - Right-click on the document line and select 'Edit', 'Electronic Records', 'Check Out'

Step 17 - In the 'Check Out' window, select the 'Check Out' folder under 'My Documents' (created in step 11) to temporarily save the rPCR for editing

Step 18 - Do not change the filename, check 'Open Document' and click 'Ok'

Step 19 - Update your document with the transcripts from the stage 2 or 3 interview and then save and close it without changing filename

Step 20 - Repeat steps 11 to 14 to retrieve the rPCR entry in iRIMS

Step 21 - Right-click on the document line and select 'Edit', 'Electronic Records', 'Check In'

Step 22 - In the 'Check In' window, enter a comment for the updated rPCR (e.g. stage 2 update), check 'Delete after import' and click 'Ok'

Step 23 - Right-click on the document line and select 'Update'

Step 24 - In the 'Update' window, change or add the following information:

- Date received and Document Date: change to the date of the stage 2 or 3 interview
- Originator: If a different person was interviewed, add a comma and their name (e.g. Roberto Bazzani, Federico Burone)
- Subject: Add the interview stage 2 or 3 at the end of the title (e.g. '*project number* - Project Completion Report of *project name* - Stages 1, 2' OR '*project number* - Project Completion Report of *project name* - Stages 1, 2, 3')
- Official: only check as 'official' if you are filing the **final** version of the stage 3 interview transcript has been reviewed and approved by the interviewee (only the system administrator can modify an official document)

Step 25 - click on 'Ok' at the bottom of the window

NOTE: If you need to modify the rPCR, refer to the procedure on how to edit a document filed in iRIMS at <http://irims.idrc.ca>. For further assistance with filing in iRIMS, contact your Records Coordinator or send an email to records@idrc.ca.