

## Agency User Help Manual

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## Overview

Welcome to the Division of Revenue & Enterprise Services - Records Management Services (RMS) eServices Portal. There are three main tabs available to all users.

- Disposition Management
- Retention Schedule
- Reports

All **Agency Users** can choose to do any of the following:

- **Search** for and view published retention schedules for all county and municipal agencies
- **Create, View, Update** and **Submit** Disposition Requests based on their own and general retention schedules
- **View** all Disposition Requests in any status for their agency.
- **Update** Disposition Status for their agency
- **View** Reports
- Update personal **User Profile**

In addition to the options available for all users, **Agency Administrators** will also be able to do the following for their agency:

- **Add** User
- **Search** for User
- **Modify** User
- **Update** Agency Profile

**Records Manager** users have access to all agencies within their organization.

In addition to the options available for all Agency Users and Agency Administrators, Records Manager users will also be able to do the following for all agencies within their organization:

- **Search** Agency ---- option allows the Update Agency Profile functionality for all agencies within Records Manager's organization.
- **Register** New Agency ---- option allows registration of agencies within Records Manager's organization.

## Account Management

### Login

The screenshot shows the Artemis login interface. At the top left is the Artemis logo with the tagline 'SECURITY RETENTION AND DISPOSITION MANAGEMENT SYSTEM'. At the top right are links for 'Contact Us | FAQ'. The central focus is a 'Login' form with the following elements:

- User Name:
- Password:
- 
- [Forgot Password](#)
- [New Agencies Register Here](#)

At the bottom of the page, it says 'Developed by Sunrise Systems Inc.'

Registered users must **login** to access the application. If the user's agency and/or the user have been disabled, they will not be able to **login**. In this case the agency administrator must be contacted.

If a user knows their user name and email address that was used to register them, but can not remember their password, they can select the '**Forgot Password**' option.



Users need to enter the **User Name** and **Email** address that was specified at registration and click on the **Get Password** button. **Password** will be sent to the **Email** specified. If user has been disabled or the user's agency has been disabled, no password will be sent and the user will see a message on the screen to that effect. If the user feels that they have been disabled in error, they must contact their agency administrator.

### **New User Registration**

New users can **register** using the '**New Users Register Here**' link located on the login screen. Refer to the following screen shot for the top portion of the **New Agency Registration** screen.

To register a **Records Manager**, select ‘**Yes**’ for the ‘**Are you the Records Manager for your organization?**’ question. User must then select the correct organization. The agency will be set automatically to the general agency for that organization. A **Records Manager** user will have access to all agencies within their organization.

To register an Agency user, select ‘**No**’ for the ‘**Are you the Records Manager for your organization?**’ question. User must then select their agency within the correct organization.

All users must enter all the primary user information and the agency contact information. If primary user and agency contact information is the same, user can select the ‘**Copy Primary User Information**’ checkbox and the agency contact information will be populated with the primary user information.

Refer to the following screen shot for the bottom portion of the **New Agency Registration** screen.

The screenshot shows a registration form with the following sections:

- Agency Contact Information:** Includes fields for First Name, Job Title, Address Line 1, City, Work Phone 1, Last Name, Email Address, Address Line 2, State (dropdown menu), Zip, and Work Phone 2. A checkbox labeled "Copy Primary User Information" is located at the top right of this section.
- Records Manager Information:** Includes fields for First Name and Work Phone. A checkbox labeled "Copy Primary User Information" and another labeled "Copy Agency Contact Information" are located at the top right of this section.
- Terms and Conditions:** A large empty text area for terms and conditions.
- Registration:** At the bottom, there is a checkbox labeled "I Accept\*", a "Signed By:" field, a "Register" button, and a "Signed Date:" field with a date picker set to 08/18/2008.

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Agency users may optionally add **Records Manager Information**. If primary user or agency contact information is the same as the **Records Manager** information, agency user can select the ‘**Copy Primary User Information**’ checkbox or the ‘**Copy Agency Contact Information**’ checkbox and the **Records Manager Information** will be populated with the appropriate information.

For **Records Manager** users, the **Records Manager Information** section will automatically be saved with **Primary User** information.

To complete the registration request the user must click on ‘**I accept**’ text box to accept the application usage **Terms and Conditions**, enter **Signed By** and **Signed Date**. After user clicks on the **Register** button, the **registration request** will be sent for review. User will be notified by email of either a completed registration or a reason for rejection as soon as the **registration request** is reviewed.

## **Agency Profile Update**

**Agency Administrator** users can update some of the information on their agency’s profile. Select **Update Agency Profile** menu option under the **System Management** tab.

**Records Manager** users can update some of the information on any of the agencies’ profiles within their organization. Select the **Search Agency** menu item within the **System Management** tab. Search for specific agency and click on the **Details** button. **Agency Profile Update** page is displayed.

Please refer to the following screen shot for the top portion of **Agency Profile Update** screen.

Agency administrator users can **update** the **agency contact information** and **records manager information** that was entered at agency registration. The name and type of organization and agency information is read only.

Please refer to the following screen shot for the bottom portion of **Update Agency Profile** screen.

User can add, edit and delete **Custodian Information**. There is no requirement for a custodian to be filled in, but if any of the custodian fields for any row are entered, all the required fields must be filled in for that row. Clicking on **Add New Row** button will display a new blank row so that more custodians can be entered.

User can view **Certificate Information** if it exists by clicking on the **scan/view** icon.

## **Add User**

**Records Managers** can add regular and agency administrator users for any registered, non general agency within their organization. For the general agency within their organization, records managers can add records manager users.

**Agency Administrators** can add regular and agency administrator users for their agency.

The screenshot shows the 'Add User' form in the Artemis system. The form is titled 'Artemis RECORDS RETENTION AND DISPOSITION MANAGEMENT SYSTEM'. It features a navigation bar with 'Disposition Management', 'Retention Schedule', 'System Management', and 'Reports'. The user is logged in as 'Cape May - testuser1 - C210000'. The form is divided into sections: 'Add User' (Organization Type, Municipality, County, Agency), 'User Information' (User Role, First Name, Last Name, Work Phone, Email Address, Pin Number, Confirm Pin Number), and 'Login Information' (Login name, Password, Confirm Password). There are 'Save' and 'Cancel' buttons at the bottom.

**Login Name** must be between 6 – 15 characters. **Password** must be between 6 – 15 characters with at least one non numeric character and one number. **Login Name** and **Password** cannot be the same. Pin must be between 4-6 digits.

## **Search User**

**Records Manager** users can search for all users in all agencies within their organization.

**Agency Administrator** users can search for all users within their agency.



The screenshot shows the Artemis web application interface. At the top left is the Artemis logo with the tagline 'RECORD RETENTION AND DISPOSITION MANAGEMENT SYSTEM'. The top right contains navigation links: 'Home | My Profile | Contact Us | Help | FAQ'. Below the logo is a navigation menu with tabs: 'Disposition Management', 'Retention Schedule', 'System Management', and 'Reports'. The user is logged in as 'Cape May - testuser1 - C210000' with a 'LOGOUT' link.

The main section is titled 'Search User'. It contains several search criteria fields:
 

- Organization Type: dropdown menu (selected: C - County)
- Municipality: dropdown menu (selected: --- Select ---)
- User First Name: text input (containing 't') with radio buttons for 'Starts With' (selected) and 'Contains'.
- Login Name: text input with radio buttons for 'Starts With' and 'Contains' (selected).
- County: dropdown menu (selected: Cape May)
- Agency: dropdown menu (selected: C210000 - COUNTY SHERIFF'S OFFICE)
- User Last Name: text input with radio buttons for 'Starts With' and 'Contains' (selected).
- User Role: dropdown menu (selected: --- Select ---)

 There are 'Search' and 'Clear' buttons below the form.

The 'Search Results' section shows 'Showing Records 1 to 3 of 3' and 'Page: 1 of 1'. The results are displayed in a table:

| User Name                   | Login Name | Role                 |                         |
|-----------------------------|------------|----------------------|-------------------------|
| tom green                   | tgreen     | Regular User         | <a href="#">Details</a> |
| test new data test new data | o00000     | Agency Administrator | <a href="#">Details</a> |
| Test Data Test Data         | testuser1  | Agency Administrator | <a href="#">Details</a> |

Below the table, it says 'Showing Records 1 to 3 of 3' and 'Page: 1 of 1'. At the bottom of the page, it says 'Developed by Sunrise Systems Inc.'

Users may select any combination of search criteria. In the results grid users may click on any column heading to search that column. The ‘**contains**’ option will find specified text located in the beginning, middle or end of the field. The ‘**starts with**’ option will find specified text in the beginning of the field.

## Modify User

**Records Manager** users can modify any user in any agency within their organization.

**Agency Administrator** users can modify any user within their agency.



The screenshot shows the 'Artemis' web application interface. The header includes the logo, navigation links (Home, My Profile, Contact Us, Help, FAQ), and a user menu (Cape May - testuser1 - C210000 | LOGOUT). The main navigation bar contains 'Disposition Management', 'Retention Schedule', 'System Management', and 'Reports'. The 'Modify User' form is displayed with the following fields:

- Organization Type:** C - County
- County:** Cape May
- Municipality:** (empty)
- Agency:** C210000 - COUNTY SHERIFF'S OFFICE
- User Information:**
  - \*First Name:** Tom
  - \*Last Name:** Green
  - \*Work Phone:** 134 523 4634 Ext: 56345
  - \*Email Address:** test@test.com
  - \*Pin Number:** (empty)
  - \*Confirm Pin Number:** (empty)
  - \*User Role:** Regular User
  - Disable User:**
  - Disabled Date:** / /
- Login Information:**
  - \*Login name:** tgreen
  - \*Password:** (empty)
  - \*Confirm Password:** (empty)

Buttons at the bottom: 'Back to Search Results' and 'Update'. The footer text reads 'Developed by Sunrise Systems Inc.'

**Agency Administrator** users can **disable** any user within their agency except themselves.

**Records Manager** users can **disable** any user in any agency within their organization except themselves.

If a user is disabled they can no longer login or use the Forgot Password feature. If nothing is entered into **pin/password** fields, the original values remain.

**Login Name** must be between 6 – 15 characters. **Password** must be between 6 – 15 characters with at least one non numeric character and one number. **Login Name** and **Password** cannot be the same. Pin must be between 4-6 digits.

## User Profile

All users can change certain fields in their own user profile.

The screenshot shows the Artemis web application interface. At the top left is the Artemis logo with the tagline 'RECORDS RETENTION AND SCHEDULE MANAGEMENT SYSTEM'. To the right are navigation links: Home | My Profile | Contact Us | Help | FAQ. Below the logo is a navigation bar with tabs: Disposition Management, Retention Schedule, System Management, and Reports. On the right of the navigation bar, it says 'Cape May - testuser1 - C210000 | LOGOUT'. The main content area is titled 'User Profile' and contains two sections: 'Organization Information' and 'Account Information'. The 'Organization Information' section includes fields for Organization Type (C - County), Municipality (N/A), Login Name (testuser1), County Name (Cape May), Agency Name (C210000 - COUNTY SHERIFF'S OFFICE), and Role Description (Agency Administrator). The 'Account Information' section includes fields for First Name (Test Data), Last Name (Test Data), Password, Confirm Password, Pin Number, Confirm Pin Number, Work Phone (with area code, prefix, and extension boxes), Email Address (mtest@hotmail.com), and User Initials. At the bottom of the form, it shows 'Created On: 1/25/2008 2:30:44 PM' and 'Updated On: 3/26/2008 4:06:51 PM'. A black button labeled 'Update User Profile' is centered at the bottom of the form. The footer of the page says 'Developed by Sunrise Systems Inc.'

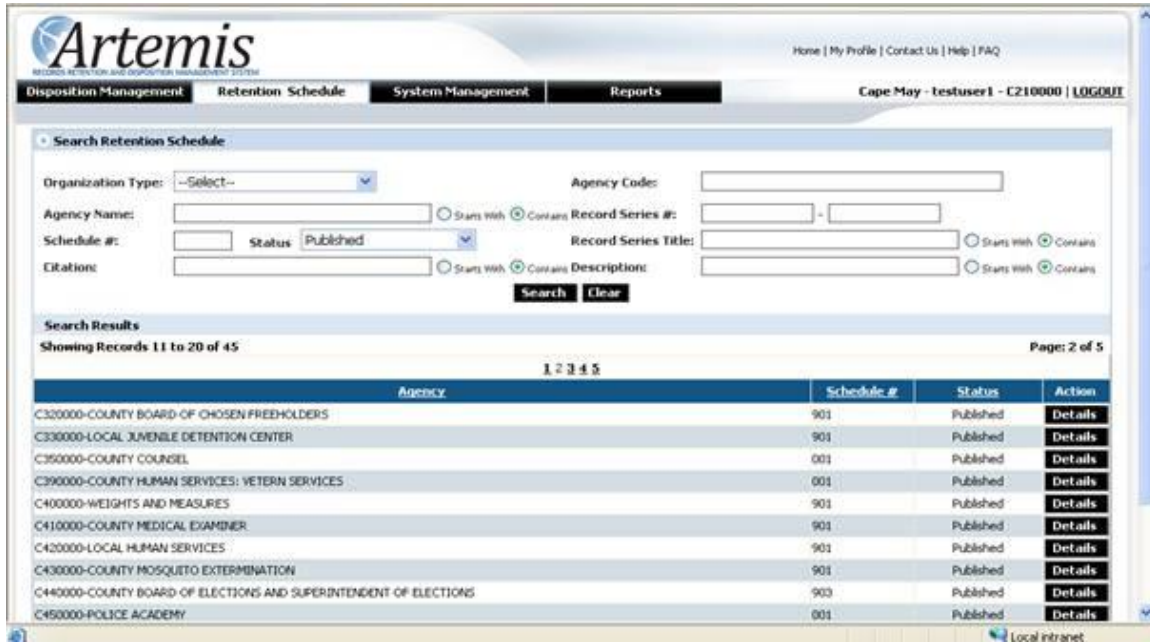
This screen is accessed by clicking on the **My Profile** link at the top right of any screen in this application.

**Login Name** and **Role Description** are read only. **Password** must be between 6 – 15 characters with at least one non numeric character and one number. **Login Name** and **Password** cannot be the same. Pin must be between 4-6 digits. If nothing is entered into **pin/password** fields, the original values remain.

## Retention Schedule

All agency users can search for, view and print published retention schedules for any agency.

### Search Retention Schedule



The screenshot shows the Artemis web application interface for searching retention schedules. The top navigation bar includes 'Disposition Management', 'Retention Schedule', 'System Management', and 'Reports'. The user is logged in as 'Cape May - testuser1 - C210000'. The search form includes the following fields and options:

- Organization Type: --Select--
- Agency Name: [Text Field]
- Agency Code: [Text Field]
- Record Series #: [Text Field]
- Record Series Title: [Text Field]
- Description: [Text Field]
- Status: Published
- Search options: Starts With, Contains

Search Results: Showing Records 11 to 20 of 45. Page: 2 of 5

| Agency  | Schedule # | Status    | Action  |
|---|------------|-----------|---------|
| C320000-COUNTY BOARD OF CHOSEN FREEHOLDERS                        | 901        | Published | Details |
| C330000-LOCAL JUVENILE DETENTION CENTER                           | 901        | Published | Details |
| C350000-COUNTY COUNSEL  | 001        | Published | Details |
| C390000-COUNTY HUMAN SERVICES: VETERAN SERVICES                   | 001        | Published | Details |
| C400000-WEIGHTS AND MEASURES                                      | 901        | Published | Details |
| C410000-COUNTY MEDICAL EXAMINER                                   | 901        | Published | Details |
| C420000-LOCAL HUMAN SERVICES                                      | 901        | Published | Details |
| C430000-COUNTY MOSQUITO EXTERMINATION                             | 901        | Published | Details |
| C440000-COUNTY BOARD OF ELECTIONS AND SUPERINTENDENT OF ELECTIONS | 903        | Published | Details |
| C450000-POLICE ACADEMY  | 001        | Published | Details |

Search Retention Schedule page is available from the home page, by clicking on the Search Retention Schedule link in the Retention Schedule tab or by selecting Search Retention Schedule menu item from the Retention Schedule menu. User can **search** on any of the individual or combination of parameters available at the top of the page. There are no restrictions on the number of search criteria that a user must enter. The **'contains'** option will find specified text located in the beginning, middle or end of the field. The **'starts with'** option will find specified text in the beginning of the field.

## View Retention Schedule

Artemis  
RECORDS RETENTION AND DISPOSITION MANAGEMENT SYSTEM

Home | My Profile | Contact Us | Help | FAQ

Disposition Management > Retention Schedule > System Management > Reports

Cape May - testboxer1 - C210000 | LOGOUT

**View Retention Schedule**

Organization: C - County    Agency: 000000 - General Agency

Division: Division    Bureau: Bureau

Schedule Number: 002    Status: Published    Date Approved: 3/5/2008

Agency Representative Name: -N/A-    Job Title: -N/A-    Phone: -N/A-    Edit: -N/A-

**Record Series Details**

| Record Series # | Record Series Number               | Placeholder Record           | Status                          |
|-----------------|------------------------------------|------------------------------|---------------------------------|
| 00000-00000     | 11111-55555                        | No                           | Active                          |
| 11111-22222     | Title: Title 4                     |                              |                                 |
| 11111-33333     | Description: -N/A-                 |                              |                                 |
| 11111-44444     | Group Name: -N/A-                  |                              |                                 |
| 11111-55555     | Superseded: C100000 903: 0000-0001 |                              |                                 |
|                 | Permanent Record: No               |                              |                                 |
|                 | Total Retention: -N/A-             |                              |                                 |
|                 | Additional Info:                   |                              |                                 |
|                 | Minimum At Agency: -N/A-           |                              |                                 |
|                 | Final Disposition: Destroy         |                              |                                 |
|                 | Archival Review Required: No       | Microfilming Recommended: No | Audit Verification Required: No |
|                 | Security: -N/A-                    | Vital Record: No             |                                 |
|                 | Citations:                         |                              |                                 |

View Retention Schedule page is available through the Search Retention Schedule Screen. In the search results grid the **'Details'** buttons can be clicked, to view selected schedule. The entire screen is read only. The top portion of the View Retention Schedule page displays schedule related information. The middle displays **record series** level information. On the left side of the middle panel is a list of **record series numbers**. When the user first comes to the screen, the details for the first record series number are displayed on the right side of the middle panel. User can click on any listed record series number to see the details for it. If a record series number is **superseding** a record series number in another schedule or a different version of this schedule the original record series number will be listed along with the original agency and schedule number.

Refer to the following screen shot for the bottom portion of the View Retention Screen.

|                           |                             |                              |                     |                                 |
|---------------------------|-----------------------------|------------------------------|---------------------|---------------------------------|
| <a href="#">0002-0000</a> | Description:                | -N/A-                        |                     |                                 |
| <a href="#">0003-0000</a> | Group Name:                 | -N/A-                        |                     |                                 |
| <a href="#">0004-0000</a> | Superseded:                 | -N/A-                        |                     |                                 |
| <a href="#">0005-0000</a> | Permanent Record:           | No                           |                     |                                 |
| <a href="#">0006-0000</a> | Total Retention:            | -N/A-                        |                     |                                 |
| <a href="#">0007-0000</a> | Additional Info:            | -N/A-                        |                     |                                 |
| <a href="#">0008-0000</a> | Minimum At Agency:          | -N/A-                        |                     |                                 |
| <a href="#">0009-0000</a> | Final Disposition:          | -N/A-                        |                     |                                 |
| <a href="#">0010-0000</a> |                             | Archival Review Required: No | Alternate Media: No | Audit Verification Required: No |
| <a href="#">0011-0000</a> | Confidential:               | -N/A-                        |                     |                                 |
| <a href="#">0012-0000</a> | Citations:                  | -N/A-                        |                     |                                 |
| <a href="#">0013-0000</a> |                             | Vital Record: No             |                     |                                 |
| <a href="#">0014-0000</a> | Agency Representative Name: | Job Title:                   | Phone:              | Ext:                            |
| <a href="#">0015-0000</a> | -N/A-                       | -N/A-                        | -N/A-               | -N/A-                           |

1 2

View All

[Back to Search Results](#) [Print](#)

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In the bottom panel of the screen, user will find the **print** button. Clicking on the **print** button brings up the retention schedule in a printable report format.

**View all** checkbox when clicked, allows user to use the scroll bar to see all the record series numbers in the grid. Clicking off the **view all** checkbox separates the list of record series numbers into pages and user must use the page number links to navigate through the list.

## Disposition Management

All **Agency Users** can, on behalf of their agency, create, update, submit, view, and print disposition requests. They can also update disposition status.

**Records Manager** users can, on behalf of all registered agencies within their organization, create, update, submit, view, and print disposition requests. They can also update disposition status.

In order to submit disposition requests, disposition request image(s) must be attached. If this is done through scanning, the following two items are required.

1. A valid scanner must be connected and correctly configured.
2. A permissions file must be executed once on every system used to scan disposition request images. This can be done by clicking on the **Click Here** link at the bottom of the **View/Scan Disposition Image** page.

## Create Disposition Request

The screenshot displays the 'Create Disposition Request' page in the Artemis system. The page header includes the Artemis logo and navigation links. The main content area is a form with the following sections:

- Retention Schedule:** C26000 - COUNTY ADJUSTER
- Schedule as:** (dropdown menu)
- Request Date:** 03/15/2008
- Requester Information:** Requester First Name: DPH, Requester Last Name: PUEK, Requester Title: (empty)
- Custodian Information:** Custodian Name: -Select-, Custodian First Name: (empty), Custodian Last Name: (empty)
- Disposition Request Details Table:**

| SL# | Record Series # | Title                        | Retention Period | Frequency | From (YYYY) | To (YYYY) | Disposal After (MM/DD/YY) | Medium Type | Volume (Cl, R) |
|-----|-----------------|------------------------------|------------------|-----------|-------------|-----------|---------------------------|-------------|----------------|
| 1   | 0004 - 0000     | Monthly Reports to Treasurer | 6 years          | 1         | 2000        | 2007      | 2/28/13                   | Paper       | 3,00           |

Buttons for 'Add New Rows' and 'Add Multiple Rows' are located below the table. At the bottom of the form are 'Save', 'Submit', 'Delete', and 'Print' buttons.

Create Disposition Request page is available from the home page, by clicking on the Create Disposition Request link in the Disposition Management tab or by selecting Create Disposition Request menu item from the Disposition Management menu.

**Agency** user may choose to **create a disposition request** based on their agency's retention schedule or on a general retention schedule. All available retention schedules are in the **Agency** dropdown. **Records Manager** user can do the same for any registered agency within their organization.


**Request Date** is pre-populated with the current date, but is editable. The date can be anytime in the past or present, not in the future.

**Requester First Name** and **Requester Last Name** are pre-populated from the logged in user's name. Users may optionally enter the **Requester Title**.




If on the Update Agency Profile page any custodians were entered, they will be displayed in the **Custodian Name** dropdown. Users may select any name from the **Custodian Name** dropdown or enter their own in the **Custodian First Name** and **Custodian Last Name**. It is possible to select either the **Custodian Name** dropdown or the **Custodian First** and **Last Name** text boxes. Only one custodian can be selected for a request.


If the **Limit Record Series to** dropdown is set to 'those requiring archival review', the only record series available will be ones specified as **Archival Review Required** in the Retention Schedule selected. If the **Limit Record Series to** dropdown is set to 'those not requiring archival review', all the record series that do not have **Archival Review Required** specified in the Retention Schedule selected will be available.

User may choose to enter a disposition request level comment in the **Comments** text box.

User may click on the  to display/print the **Retention Schedule** selected.


**Disposition Request Details** section contains all the record series information for the disposition request. This section is completely disabled until a selection is made in the Agency dropdown.

The first item on the left for every record series detail is  for **information**. Clicking on  will display the description and retention period for that record series. The  icon next to the **information** icon allows users if they so choose to enter and view record series level comments.

If the user knows the **record series #** that they want to enter, they may just type it in. If the user wants to enter **one record series #**, but is not sure of what it is, the user may click on the . This will bring up a pop up with a list of applicable record series numbers for the retention schedule the user chose. If Archival Review Required checkbox is clicked on, only those record series that have that option specified in the selected retention schedule will be displayed. The user may select **one** record series from the list by clicking on it. **Record series #** selected will be populated in the detail section of the disposition request.



Once a **Record Series #** is entered, the **Record Series Title** and **Retention Period** are automatically populated. **Retention period** is not populated, if it does not exist in the retention schedule or if the **retention period** is based on specified events in the retention schedule.

The user must enter the **From** and **To** dates for the documents represented by the **record series #**. The user must also select the **Medium Type** from the dropdown and enter the **Volume** to be disposed in cubic feet. If the user does not know the volume in cubic feet, they may click on the  (convert quantity) icon within the **volume** data entry area. A pop up will be displayed, allowing the user to enter the volume in units that are known to them and the result converted into cubic feet will be populated in the disposition request.

**Dispose After** date is populated as a guideline for when a set of documents (detail line) on the disposition request represented by a record series # are eligible for disposition. **Dispose After** date will not be populated if **Retention Period** is not populated or if the **Dispose After** date is already in the past.

The user may choose to **delete** a **record series #** detail line by clicking on the  icon or to **add another row** by clicking on the **Add New Row** button.

If the user wants to enter multiple record series numbers they can select the **Add Multiple Rows** button. A pop up is displayed with a list of applicable **record series numbers**, their **titles** and **retention periods**. User can click on the selection box to the left of the **record series number** for as many **record series numbers** as the user wants. On clicking 'ok' at the top or the bottom of the **record series list** pop up, all selected **record series numbers** will be populated in the detail section of the disposition request. Refer to the following screen shot for the multiple **record series selection** pop up.



To submit the disposition request the user must first save it by clicking on the **Save** button. When a request is **saved**, a **Request Id** is created for that request and displayed at the top, the **Print**, **Disposition Form Image** and **Delete** buttons are enabled. **Submit** button remains disabled until an image is attached to the disposition request (**Disposition Form Image** button functionality). Refer to the following screen shot for a saved disposition request.



The user can **print** the REQUEST AND AUTHORIZATION FOR RECORDS DISPOSAL form based on the current disposition request by clicking on the **Print** button.

After obtaining the applicable **signatures**, the user can then click on the **Disposition Form Image** button and **scan** or **upload** from disk the updated REQUEST AND AUTHORIZATION FOR RECORDS DISPOSAL form. Refer to the following screenshot.

View/Scan Disposition Image -- Web Page Dialog

Scan Disposition Form Image

Request Id: 421      Status: Ready For Submission

Agency: C250000 - COUNTY BOARD OF TAXATION      Image Type: Disposition Request

Include images of microfilming certificate, imaging certificate, and damaged records certificate with disposition request as applicable.

Front Side   Letter   Add at End   Fit to Width   Enhance

NJDARM - Division of Archives and Records Management

**REQUEST AND AUTHORIZATION FOR RECORDS DISPOSAL**

Instructions: Please type or print. This request must be submitted prior to the disposition of any public records. State agencies must complete items 1 through 9, county and municipal must also complete items 10, 11 and 12. If fiscal records are listed, Return initial form (all four parts) to: DISPOSAL REQUESTS, Department of State, Division of Archives and Records Management (DARM), 2300 Skyway East Avenue, P.O. Box 307, Trenton, N.J. 08625. For questions or assistance, call (609) 530-3209. Please include self-addressed envelope for expedited service.

1. Requesting Agency Name  
COUNTY BOARD OF TAXATION  
1 Main St Arny Town NJ 12344  
(732) 555-1212 Ext:n

1.A Agency Retention Schedule Number  
C250000 - 902

2. Request Id/Date  
109  
4/28/2008

3. Requested By (Signature)  
George Bush  
President

4. Request Approved By (Signature)  
George Bush

Records Manager (Signature)  
George Bush

Archival Review  
Not Required

Premature Disposition  
Microfilm   Digital Image   Damaged Records Certificate

Comments

Authorization is here by requested for the disposal of the following public records in accordance with New Jersey P.L. 1953, c. 410 as amended. It is further certified that the record series listed herein have exceeded their respective retention periods and are not involved in litigation and are not required for present or future audit. NOTE: Items 5, 6, and 8 must be completed as they appear on an approved records retention schedule.

| #                      | 5. Series # | 6. Record Series Title                                   | 7. Retention Period | 8. Inclusive Dates |              | Dispose After | 9. Volume (in Cubic Feet) |
|------------------------|-------------|--|---------------------|--------------------|--------------|---------------|---------------------------|
|                        |             |  |                     | From (MM/YYYY)     | To (MM/YYYY) |               |                           |
| 1                      | 0003-0002   | Appeal Case File - Judgments                             |                     | 01/1998            | 12/2004      |               | 2.00                      |
| 2                      | 0004-0000   | NJ Tax Court Appeals - Filed With County                 |                     | 01/1998            | 12/2005      |               | 2.00                      |
| 3                      | 0005-0000   | Tax Appeals Register                                     |                     | 01/2002            | 12/2005      |               | 4.00                      |
| 4                      | 0006-0000   | Appeal Schedules/Log List                                |                     | 01/2003            | 12/2005      |               | 4.00                      |
| 5                      | 0007-0000   | Judgment proof lists                                     | 3 Years             | 01/2002            | 12/2005      |               | 4.00                      |
| 6                      | 0009-0000   | New Construction Cap Report (JDC-1, JDC-2)               | 3 Years             | 01/2003            | 12/2005      |               | 2.00                      |
| 7                      | 0010-0000   | Equalization Tables - Preliminary and Final Equalization |                     | 01/2003            | 12/2007      |               | 4.00                      |
| 8                      | 0011-0000   | Exempt Property  | 3 Years             | 01/2003            | 12/2006      |               | 2.00                      |
| 9                      | 0012-0001   | Meeting Records File - Minutes of the Board of Taxation  |                     | 01/2005            | 12/2006      |               | 2.00                      |
| For Division Use Only: |             |  |                     |                    |              |               | Total Volume : 26.00      |

10. Audit Verification      11. Authorization      12. Disposition












Page 1 of 1   Resolution: 300 X 300 DPI   Height X Width : 2560 X 3300 Pixel   Height X Width : 8.5 X 11 Inches

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I certify that the images attached to this disposition request were scanned in accordance with the policies and procedures provided by the New Jersey Division of Archives and Records Management.

Save   Close

The following features are available on the **View Scan Disposition Image** page.

1. Click on  to scan a document and attach it to the disposition request.
2. Click on  to pick up a previously saved to disk document and attach it to the disposition request.
3. Select the paper size that is being scanned in (Letter, A4, Legal).
4. Select where to place the scanned/loaded images:
  - A. Add at End – appends images to the end of the image list.
  - B. Insert Before – inserts images before the first one.
  - C. Replace Current – deletes existing images and replaces them with new ones.
5. Save a newly scanned/loaded image to disk by clicking on .
6. Print images by clicking on .
7. Zoom an image in and out by using the  and .
8. Delete current image by clicking on .
9. Click on **Delete All** to delete all scanned/loaded images.
10. Rotate an image by clicking on .
11. Click on  to undo the changes made.
12. Click on  and  to move between scanned/loaded images.
13. Click on the **Click Here** link at the bottom of the page to correct viewing/scanning images problems.

After saving the new image(s) (click on the **Save** button at the bottom of the screen) close the images window by clicking on the **Close** button next to the **Save** button. The status of the request becomes '**Ready for Submission**' and the **Submit** button becomes enabled. Clicking on the **Submit** button submits the request and makes it read only for the agency user. Once submitted, the request will be reviewed and either authorized or rejected.

## Search Disposition Request

Artemis  
RECORDS RETENTION AND DISPOSITION MANAGEMENT SYSTEM

Home | My Profile | Contact Us | Help | FAQ

Disposition Management | Retention Schedule | System Management | Reports | Monmouth - ipublic - C260000 | LOGOUT

Search Disposition Request

Retention Schedule: C260000 - COUNTY ADJUSTER Schedule #:

Status: --Select-- Request Id:

Submitted Date: From  /  /  To  /  /  (mm/dd/yyyy) Request Date: From  /  /  To  /  /  (mm/dd/yyyy)

Auth/Rejected Date: From  /  /  To  /  /  (mm/dd/yyyy) Authorization #:  Archival Review: --Select--

RIM Request Id:

Search Results

Showing Records 1 to 4 of 4 Page: 1 of 1

| Submitted Date | Request Date | Request Id | Schedule #  | Status                | Archival Review | Authorization Number | Auth/Rejected Date | RIM Request Id | Action                              |
|----------------|--------------|------------|-------------|-----------------------|-----------------|----------------------|--------------------|----------------|-------------------------------------|
| 04/28/2008     | 04/28/2008   | 116        | C260000-901 | Disposition Completed | No              | 10                   | 04/28/2008         |                | <input type="button" value="View"/> |
| 04/24/2008     | 04/24/2008   | 113        | C260000-901 | Disposition Completed | No              | 9                    | 04/24/2008         | 123            | <input type="button" value="View"/> |
|                | 05/02/2008   | 129        | C260000-901 | Work In Progress      | No              |                      |                    |                | <input type="button" value="Edit"/> |
|                | 05/07/2008   | 138        | C260000-901 | Ready For Submission  | No              |                      |                    |                | <input type="button" value="Edit"/> |

Showing Records 1 to 4 of 4 Page: 1 of 1

Developed by Sunrise Systems Inc.

Search Disposition Request page is available from the home page, by clicking on the Search Disposition Request link in the Disposition Management tab or by selecting Search Disposition Request menu item from the Disposition Management menu. User can **search** on any of the individual or combination of parameters available at the top of the page. The only requirement is that the user must enter at least one **search** criterion.

In the results grid the **Action** button depends on the **Status** of the request. If the request is in any **Status** before **Submitted**, the **Action** button is **Edit**. If the request **Status** is any **Status** after **Submitted**, then the **Action** button is **View**. The user can **edit** any disposition request that has not been submitted yet. Once a request has been submitted, the only modification possible is to update the disposition status for disposition requests that have been **authorized**.

## Update Disposition Request

The screenshot shows the 'Update Disposition Request' page in the Artemis system. The page header includes the Artemis logo and navigation links. The main form contains the following fields:

- Retention Schedule:** CAGSD - COUNTY ADJUTEN
- Schedule at:** [Dropdown]
- Limit Record Series to:** THOSE REQUIRING ARCHIVAL REVIEW
- Requester First Name:** JOHN
- Requester Last Name:** DUBO
- Requester Title:** [Empty]
- Custodian First Name:** [Empty]
- Custodian Last Name:** [Empty]
- Damaged Records Certificate:** [Checkbox]
- Digital Image Present:** [Checkbox]
- Location:** [Empty]
- RPM Request ID:** [Empty]
- Request Date:** 03/15/2008
- Comments:** [Text Area]


Below the form is a table titled 'Disposition Request Details' with the following data row:

| S.# | Record Series # | Title                        | Retention Period | From year | To year | Creation Date | Medium Type | Volume (Cl. #) |
|-----|-----------------|------------------------------|------------------|-----------|---------|---------------|-------------|----------------|
| 1   | 0004 - 0000     | Monthly Reports to Treasurer | 6 Years          | 01/2000   | 02/2007 | 02/2013       | Paper       | 3.00           |

Buttons at the bottom include 'Add New Row', 'Add Multiple Rows', 'Disposition Form Image', 'Back to Search Results', 'Save', 'Submit', 'Delete', and 'Print'.

**Update Disposition Request** page is available from the **Search Disposition Request** page. Any disposition request that has not been submitted yet will be available for **update**. In the search results grid all requests available for **update** will have an **Action** button of **Edit**.

**Request Id**, **Retention Schedule/Retention Schedule #** and **Limit Record Series to** are filled in based on what was entered on the Create Disposition Request screen. All four of these are read only. **Limit Record Series to** dropdown is set to 'those requiring archival review' to signify that the current disposition request, contains only those record series that have **Archival Review Required** selected in the specific **retention schedule** that is the basis for the current disposition request. If the user needs to add record series numbers to a disposition request that has **Limit Record Series to** dropdown set to 'those requiring archival review', the only record series available will be ones specified as **Archival Review Required** in the **retention schedule** selected.

User may click on the  to display/print the **Retention Schedule** selected.




**Request Date** is filled in with information entered on the Create Disposition Request screen, but is editable. The date can be anytime in the past or present, not in the future.




**Requester First Name, Requester Last Name, Requester Title, Custodian First Name and Custodian Last Name** are filled in with information entered on the Create Disposition Request screen. All of them are editable.


User may choose to enter a disposition request level comment in the **Comments** text box.

**Disposition Request Details** section contains all the record series information for the disposition request.

The first item on the left for every record series detail is  for **information**. Clicking on  will display the **Description** and **Retention Period** for that record series. The  icon next to the **information** icon allows users if they so choose to enter and view record series level comments.

If the user knows the **record series #** that they want to enter, they may just type it in. If the user wants to enter **one record series #**, but is not sure of what it is, the user may click on the . This will bring up a pop up with a list of applicable record series numbers for the retention schedule the user chose. If Archival Review Required checkbox is clicked on, only those record series that have that option specified in the selected retention schedule will be displayed. The user may select **one** record series from the list by clicking on it. **Record series #** selected will be populated in the detail section of the disposition request.

Once a **Record Series #** is entered, the **Record Series Title** and **Retention Period** are automatically populated. **Retention period** is not populated, if it does not exist in the retention schedule or if the **retention period** is based on specified events in the retention schedule.

The user must enter the **From** and **To** dates for the documents represented by the **record series #**. The user must also select the **Medium Type** from the dropdown and enter the **Volume** to be disposed in cubic feet. If the user does not know the volume in cubic feet, they may click on the  (convert quantity) icon within the **volume** data entry area. A pop up will be displayed, allowing the user to enter the volume in units that are known to them and the result converted into cubic feet will be populated in the disposition request.

**Dispose After** date is populated as a guideline for when a set of documents (detail line) on the disposition request represented by a record series # are eligible for disposition. **Dispose After** date will not be populated if **Retention Period** is not populated or if the **Dispose After** date is already in the past.

The user may choose to **delete** a **record series #** detail line by clicking on the  icon or to **add another row** by clicking on the **Add New Row** button.

If the user wants to enter multiple record series numbers they can select the **Add Multiple Rows** button. A pop up is displayed with a list of applicable **record series numbers**, their **titles** and **retention periods**. User can click on the selection box to the



left of the **record series number** for as many **record series numbers** as the user wants. On clicking ‘ok’ at the top or the bottom of the **record series list** pop up, all selected **record series numbers** will be populated in the detail section of the disposition request. Refer to the following screen shot for the multiple **record series selection** pop up.



The user can **print** the REQUEST AND AUTHORIZATION FOR RECORDS DISPOSAL form based on the current disposition request by clicking on the **Print** button. After obtaining the applicable **signatures**, the user can then click on the **Disposition Form Image** button and scan or upload from disk the updated REQUEST AND AUTHORIZATION FOR RECORDS DISPOSAL form. Refer to the following screen shot.

View/Scan Disposition Image -- Web Page Dialog

Scan Disposition Form Image

Request Id: 421      Status: Ready For Submission

Agency: C250000 - COUNTY BOARD OF TAXATION      Image Type: Disposition Request

Include images of microfilming certificate, imaging certificate, and damaged records certificate with disposition request as applicable.

Front Side   Letter   Add at End   Fit to Width   Enhance

NJARM - Division of Archives and Records Management

**REQUEST AND AUTHORIZATION FOR RECORDS DISPOSAL**

Instructions: Please type or print. This request must be submitted prior to the disposition of any public records. State agencies must complete items 1 through 9, county and municipal must also complete items 10, A and 10, B. If fiscal records are listed, Return initial form (all four parts) to: DISPOSAL REQUESTS, Department of State, Division of Archives and Records Management (NJARM), 2300 Skyway Avenue, P.O. Box 307, Trenton, N.J. 08625. For questions or assistance, call (609) 530-3208. Please include self-addressed envelope for expedited service.

1. Requesting Agency Name  
COUNTY BOARD OF TAXATION  
1 Main St Arny town NJ 12344  
(732) 555-1212 Ext:n

1.A Agency Retention Schedule Number  
C250000 - 902

2. Request Id/Date  
109  
4/28/2008

3. Requested By (Signature)  
George Bush  
Sj

4. Request Approved By (Signature)  
Sj

Records Manager (Signature)  
George Bush  
Sj

Archival Review  
Not Required      Premature Disposition      Comments

Microfilm   Digital Image   Damaged Records Certificate

Authorization is here by requested for the disposal of the following public records in accordance with New Jersey P.L. 1953, c. 410 as amended. It is further certified that the record series listed herein have exceeded their respective retention periods and are not involved in litigation and are not required for present or future audit. NOTE: Items 5, 6, and 8 must be completed as they appear on an approved records retention schedule.

| #                      | 5. Series # | 6. Record Series Title                                   | 7. Retention Period | 8. Inclusive Dates |              | Dispose After | 9. Volume (in Cubic Feet) |       |
|------------------------|-------------|--|---------------------|--------------------|--------------|---------------|---------------------------|-------|
|                        |             |  |                     | From (MM/YYYY)     | To (MM/YYYY) |               |                           |       |
| 1                      | 0003-0002   | Appeal Case File - Judgments                             |                     | 01/1998            | 12/2004      |               | 2.00                      |       |
| 2                      | 0004-0000   | NJ Tax Court Appeals - Filed With County                 |                     | 01/1998            | 12/2005      |               | 2.00                      |       |
| 3                      | 0005-0000   | Tax Appeals Register                                     |                     | 01/2002            | 12/2005      |               | 4.00                      |       |
| 4                      | 0006-0000   | Appeal Schedules/Log List                                |                     | 01/2003            | 12/2005      |               | 4.00                      |       |
| 5                      | 0007-0000   | Judgment proof lists                                     | 3 Years             | 01/2002            | 12/2005      |               | 4.00                      |       |
| 6                      | 0009-0000   | New Construction Cap Report (JDC-1, JDC-2)               | 3 Years             | 01/2003            | 12/2005      |               | 2.00                      |       |
| 7                      | 0010-0000   | Equalization Tables - Preliminary and Final Equalization |                     | 01/2003            | 12/2007      |               | 4.00                      |       |
| 8                      | 0011-0000   | Exempt Property  | 3 Years             | 01/2003            | 12/2006      |               | 2.00                      |       |
| 9                      | 0012-0001   | Meeting Records File - Minutes of the Board of Taxation  |                     | 01/2005            | 12/2006      |               | 2.00                      |       |
| For Division Use Only: |             |  |                     |                    |              |               | Total Volume:             | 26.00 |

10. Audit Verification      11. Authorization      12. Disposition

Page 1 of 1   Resolution: 300 X 300 DPI   Height X Width : 2560 X 3300 Pixel   Height X Width : 8.5 X 11 Inches

Having trouble viewing or scanning images? [Click Here](#)

I certify that the images attached to this disposition request were scanned in accordance with the policies and procedures provided by the New Jersey Division of Archives and Records Management.

Save   Close

If no images existed previously, after saving the new image(s) (to save click on the **Save** button at the bottom of the screen), the status of the request becomes ‘**Ready for Submission**’ and the **Submit** button becomes enabled.

Deleting all image(s) will cause request status to revert back to ‘**Work in Progress**’ and the **Submit** button to become disabled.

For all available features on the **View/Scan Disposition Image** screen refer to the **Create Disposition** section of this document.

Clicking on the **Submit** button **submits** the request and makes it read only for the agency user. Once **submitted**, the request will be reviewed and either authorized or rejected.

## View Disposition Request

**Artemis**  
RECORDS, RETENTION AND DISPOSITION MANAGEMENT SYSTEM

Home | My Profile | Contact Us | Help | FAQ

Disposition Management | **Retention Schedule** | System Management | Reports

Muskegon - public - C260000 | LOGOUT

**View Disposition Request** Request ID: 139 Status: Authorized

Request Date: 05/06/2009 Submit Date: 05/06/2009 Submission Type: Web  
Type: C County: Muskegon Municipality: COUNTY AUDITOR Agency: COUNTY AUDITOR  
Schedule #: C26000-001 Archival Review Required: No Requester Name: John Public  
Requester Title: Custodian Name: Agency Comment:  
Microfilm Present: No Digital Image Present: No Damaged Records Certificate: No  
Location: RDM Request ID: DARM Comment:

**Disposition Request Details**

| S#R | Record Series # | Title                                 | Retention Period | From (m/y) | To (m/y) | Medium Type | Agency Comment | Disposal After (m/y) | Volume (in. ft.) | Arch. Volume (in. ft.) | Status     | DARM Comments |
|-----|-----------------|---------------------------------------|------------------|------------|----------|-------------|----------------|----------------------|------------------|------------------------|------------|---------------|
| 1   | 0010-0000       | Budget and Appropriation Requests     | 6 Years          | 01/2000    | 12/2001  | Paper       |                |                      | 12.00            |                        | Authorized |               |
| 2   | 0011-0000       | Office Supplies and Printing Requests | 6 Years          | 01/2000    | 12/2001  | Paper       |                |                      | 4.00             |                        | Rejected   |               |
| 3   | 0012-0000       | Case Records - Inactive and Dead      | 6 Years          | 01/2001    | 12/2001  | Paper       |                |                      | 2.00             |                        | Authorized |               |

**Review Information**  
Authorization #: 25 Authorization, Rejection Date: 05/06/2009 Rejection Reason:

**Final Disposition Status**  
Final Disposition: Comment: User Name: Disposition Date:

Disposition Form Image Back to Search Results Update Disposition Status Print

Developed by Sunrise Systems Inc.

View Disposition Request page is available through the Search Disposition Request screen. Any disposition request that has been submitted will be available for **View**. In the search results grid of the Search Disposition Request screen, all requests available for **View** will have an **Action** button of **View**.

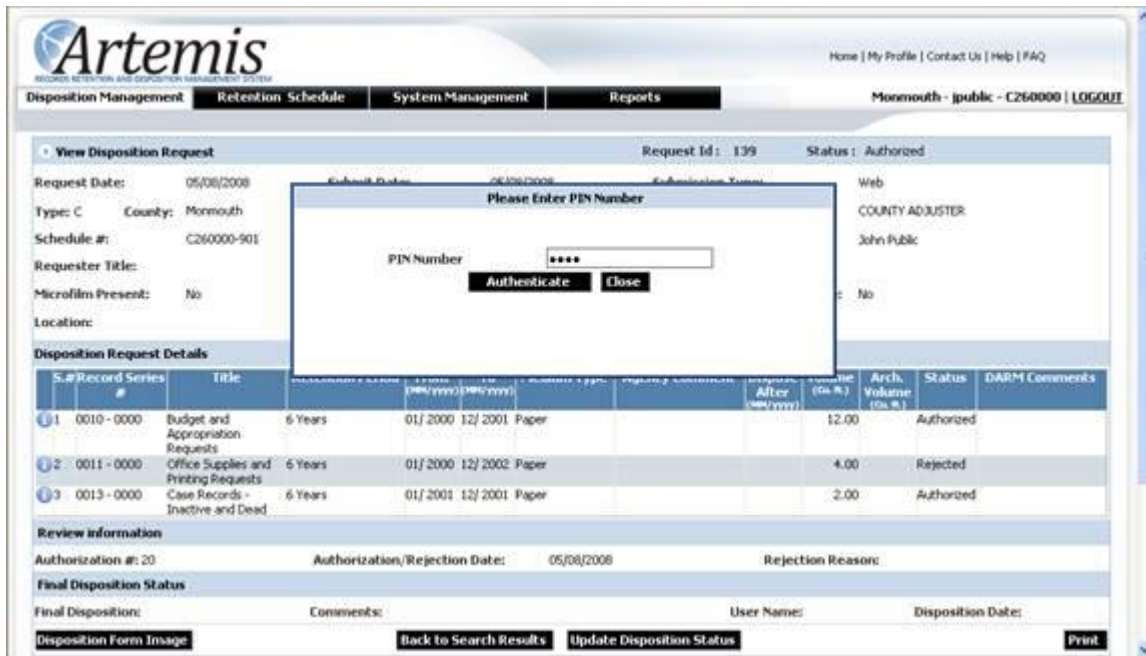
Disposition Requests in the following **statuses** can be **viewed**:

1. **Submitted**
2. **Archival Review Pending**
3. **Archival Review Completed**
4. **Rejected** – **Rejection Date** and **Rejection Reason** are populated under **Review Information** section.
5. **Authorized** – **Authorization Number** and **Authorization Date** are populated under **Review Information** section. **Update Disposition Status** button is available.
6. **Disposition Completed** - **Authorization Number** and **Authorization Date** are populated under **Review Information** section. **Final Disposition**, **Comment**, **User Name** and **Disposition Date** are populated under the **Final Disposition Status** section.

The entire screen is read only except the **Update Disposition Status** button for disposition requests in **Authorized** status. Once disposition of authorized documents has

been completed, the user can update the disposition status by clicking on the **Update Disposition Status** button. This is a two step process.

First the user will be asked to enter their **Pin Number** for **authentication**. If a valid **Pin Number** is entered, **authentication** will be successful. Please use the **Pin Number** that was assigned at agency registration or user creation. **Pin Number** can be reset by going into **My Profile** page.



If **authenticate** is successful, the following pop up is displayed.



**User Name**, **Disposition Date**, and **Disposition Method** must be filled in before disposition status update is successful. Optionally, **Comments** may be filled in. **User Name** is populated on entry to the screen with the logged in user's user name but can be edited. **Disposition Date** is populated on entry to the screen with the current date, but can be edited with any date in the past or present. **Disposition Method** must be selected from the **Disposition Method** dropdown.

## Functionality Available to Records Manager Only

**Records Manager** users in addition to having access to all **Agency Administrator** functionality for all agencies within their organization can also **register all new agencies** within their organization. Refer to the following screen.

The screenshot shows the 'New Agency Registration' form in the Artemis system. The form is divided into several sections: 'Primary User Information', 'Agency Contact Information', and 'Records Manager Information'. Each section contains various input fields for user details, agency contact details, and records manager details. A 'Register' button is located at the bottom of the form. The form also includes a 'Copy' checkbox for each section.

**Artemis**  
RECORDS RETENTION AND DISPOSITION MANAGEMENT SYSTEM

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Disposition Management | Retention Schedule | System Management | Reports

Atlantic - testme - 0800000 | LOGOUT

**New Agency Registration**

\*Organization Type: County County: Atlantic  
Municipality: Agency: Select

**Primary User Information** (Optional unless registering Records Manager)

First Name: Last Name: [ ]  
Login Name: User Initials: [ ]  
Password: Confirm Password: [ ]  
Pin Number: Confirm Pin Number: [ ]  
Work Phone: [ ] [ ] [ ] Ext: [ ] Email Address: [ ]

**Agency Contact Information**  Copy Primary User Information

\*First Name: Last Name: [ ]  
\*Address Line 1: Address Line 2: [ ]  
\*City: State: NJ Zip: [ ]  
\*Work Phone 1: [ ] [ ] [ ] Ext: [ ] \*Job Title: [ ]  
Work Phone 2: [ ] [ ] [ ] Ext: [ ] \*Email Address: [ ]

**Records Manager Information**  Copy Primary User Information  Copy Agency Contact Information

First Name: Last Name: [ ]  
Work Phone: [ ] [ ] [ ] Ext: [ ]

**Register**

Developed by Sunrise Systems Inc.

**Records Manager** user needs to select the agency and enter **Agency Contact Information**. **Records Manager** information is optional. Primary User information is also optional, but only as long as nothing is entered in any of the Primary User information fields. As soon as something is entered, all fields must be filled in.