Artemis
RECORDS RETENTION AND DISPOSITION MANAGEMENT SYSTEM

Agency User Help Manual

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Functionality Available to Records Manager Only 30

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:

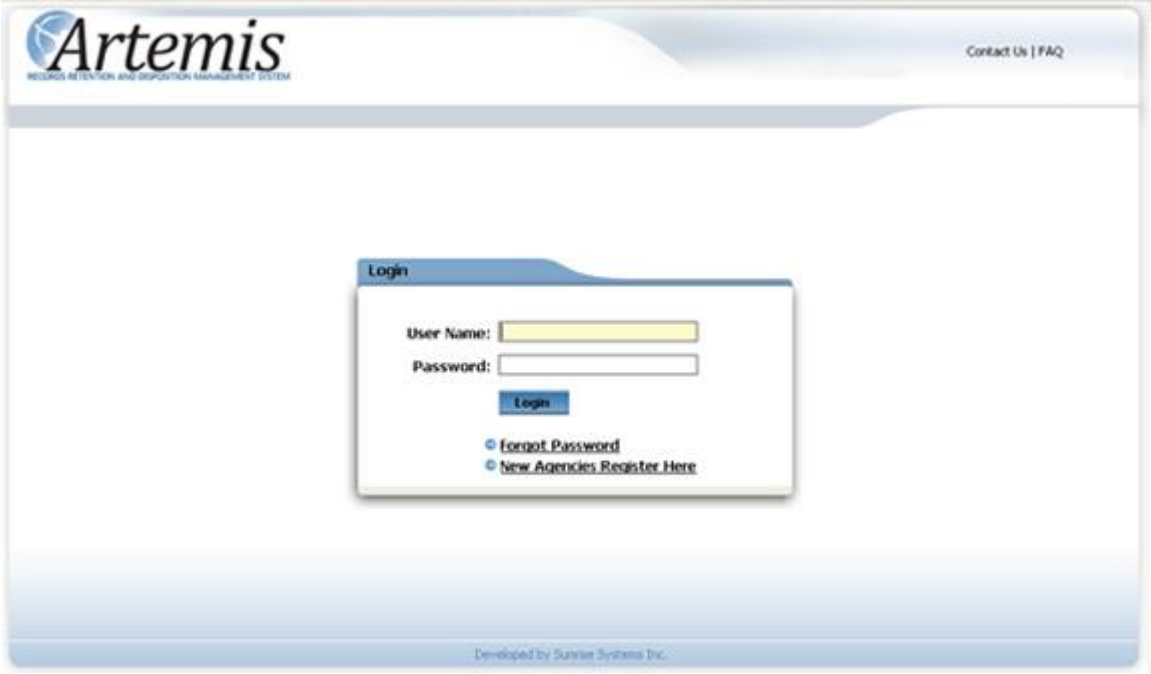
- **Add** User
- **Search** for User
- **Modify** User
- **Update** Agency Profile

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



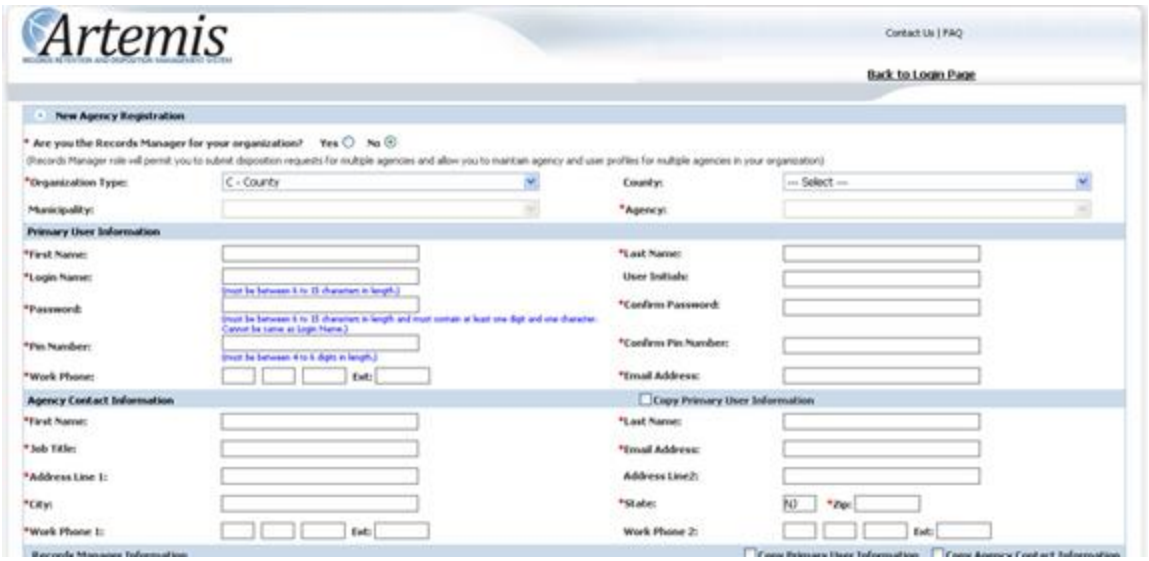
Registered users must **login** to access the application. If the user's agency and/or the user have been disabled, they will not be able to **login**. In this case the agency administrator must be contacted.

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.

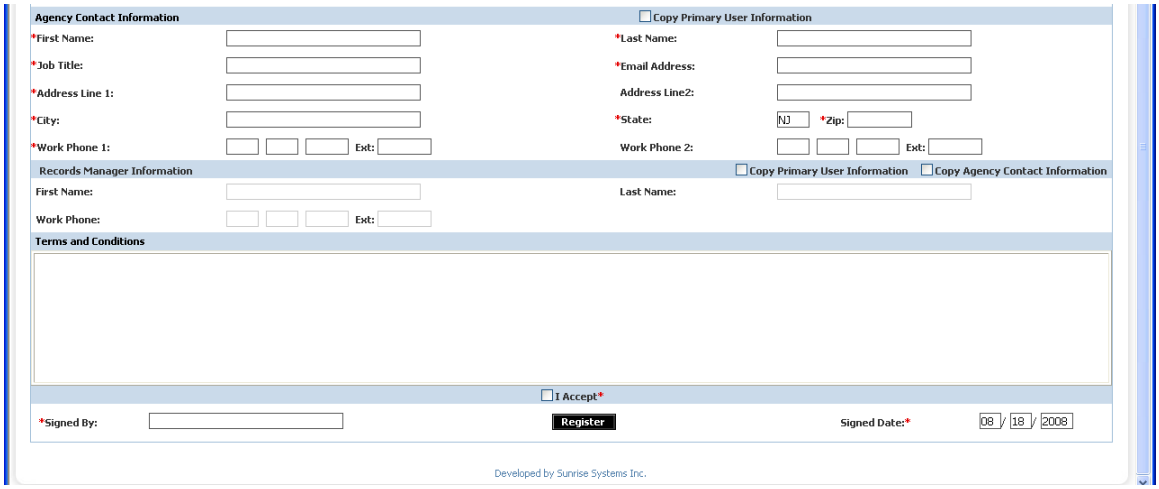


To register a **Records Manager**, select '**Yes**' for the '**Are you the Records Manager for your organization?'** question**.** User must then select the correct organization. The agency will be set automatically to the general agency for that organization. A **Records Manager** user will have access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



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.

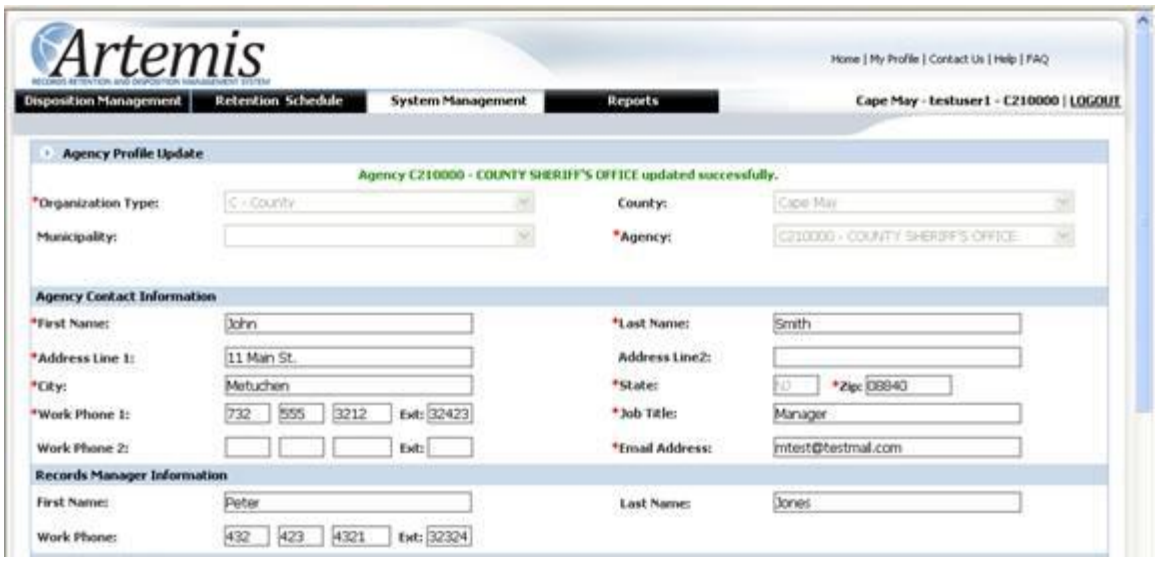
To complete the registration request the user must click on '**I accept'** text box to accept the application usage **Terms and Conditions**, enter **Signed By** and **Signed Date**. After user clicks on the **Register** button, the **registration request** will be sent for review. User will be notified 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.

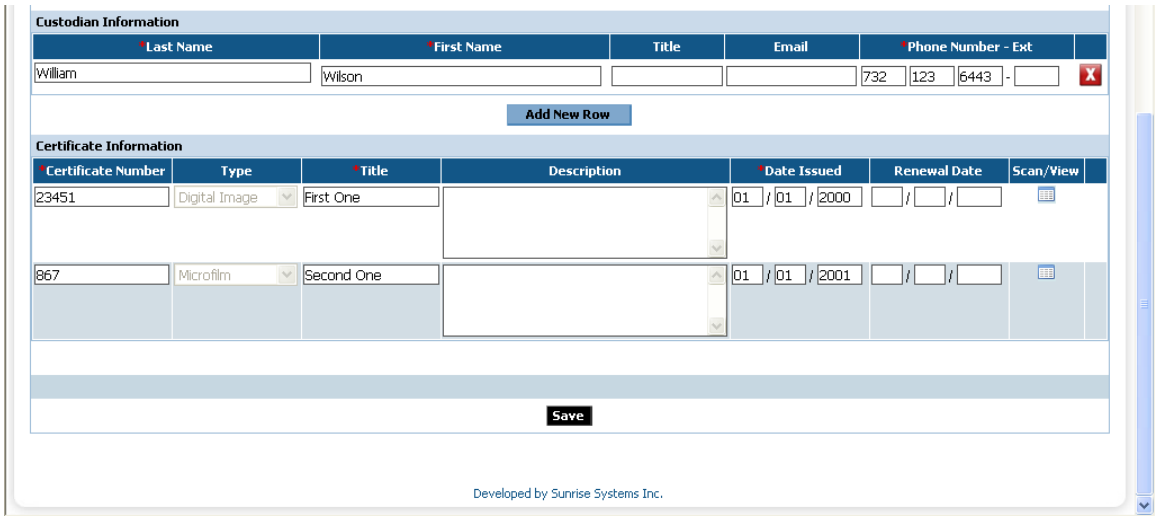
Records Manager users can update some of the information on any of the agencies' profiles within their organization. Select the **Search Agency** menu item within the **System Management** tab. Search for specific agency and click on the **Details** button. **Agency Profile Update** page is displayed.

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.

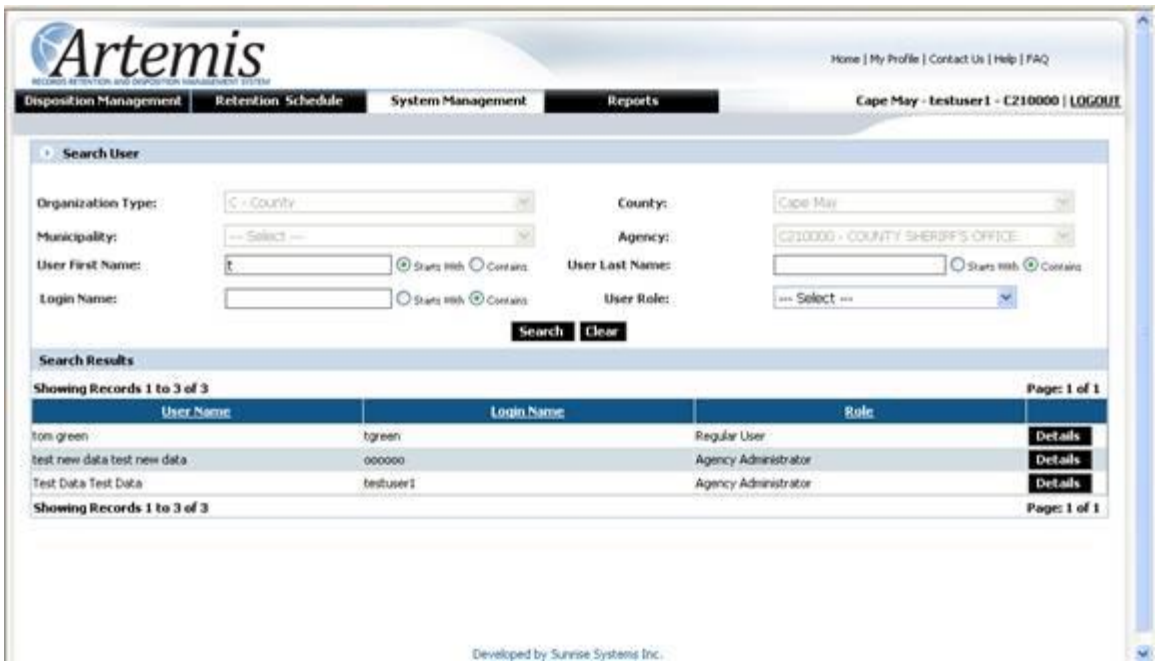
Agency Administrators can add regular and agency administrator users for their agency.

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.



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.

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

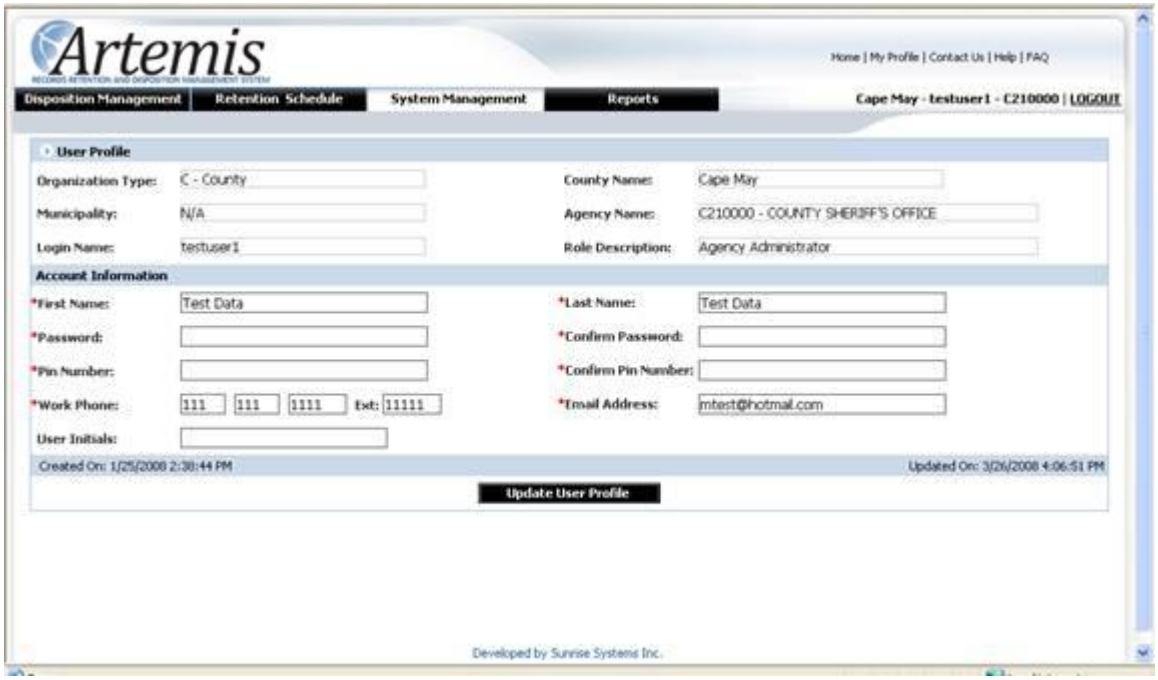
Records Manager users can **disable** any user in any agency within their organization except themselves.

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.

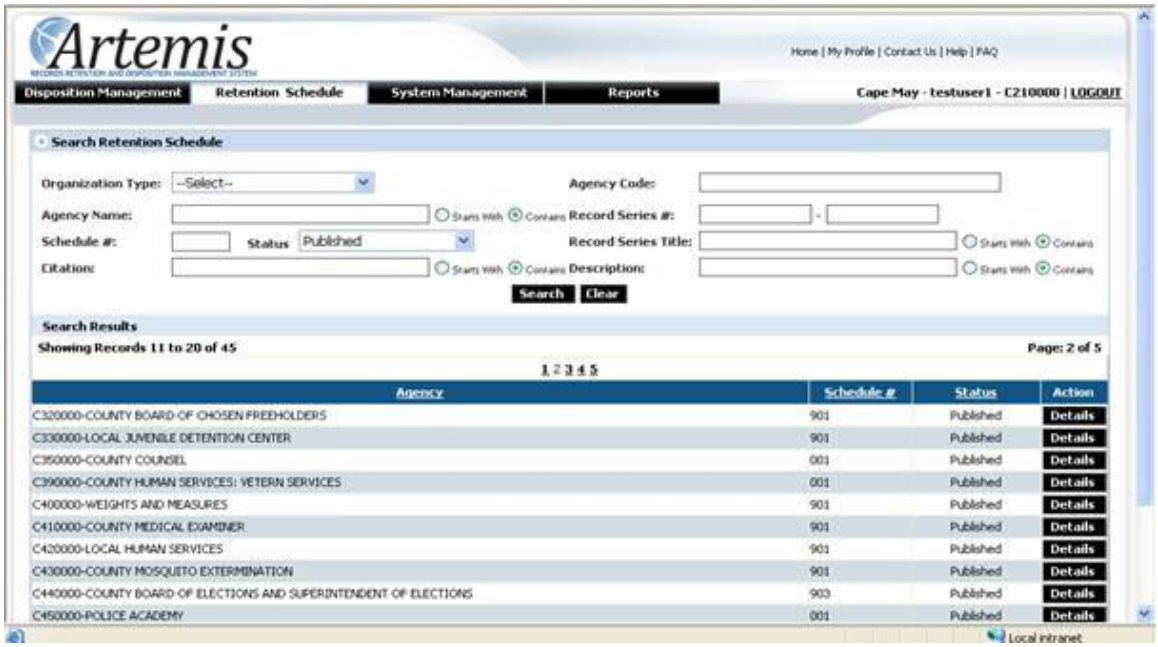


This screen is accessed by clicking on the **My Profile** link at the top right of any screen in this application.
Login Name and **Role Description** are read only. **Password** must be between 6 – 15 characters with at least one non numeric character and one number. **Login Name** and **Password** 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

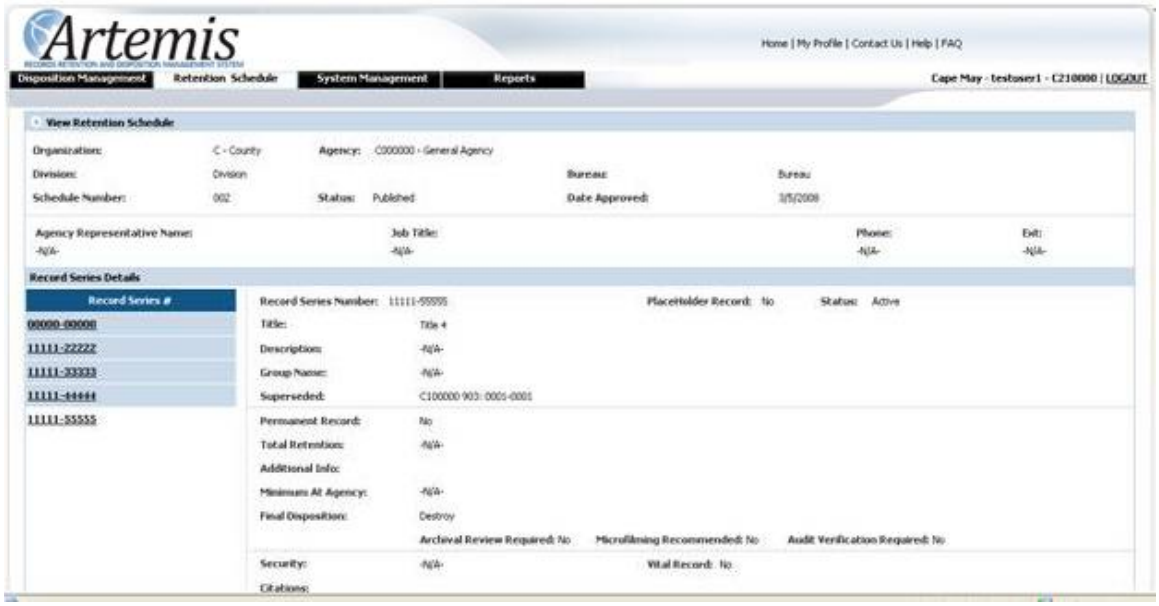
All agency users can search for, view and print published retention schedules for any agency.

Search Retention Schedule



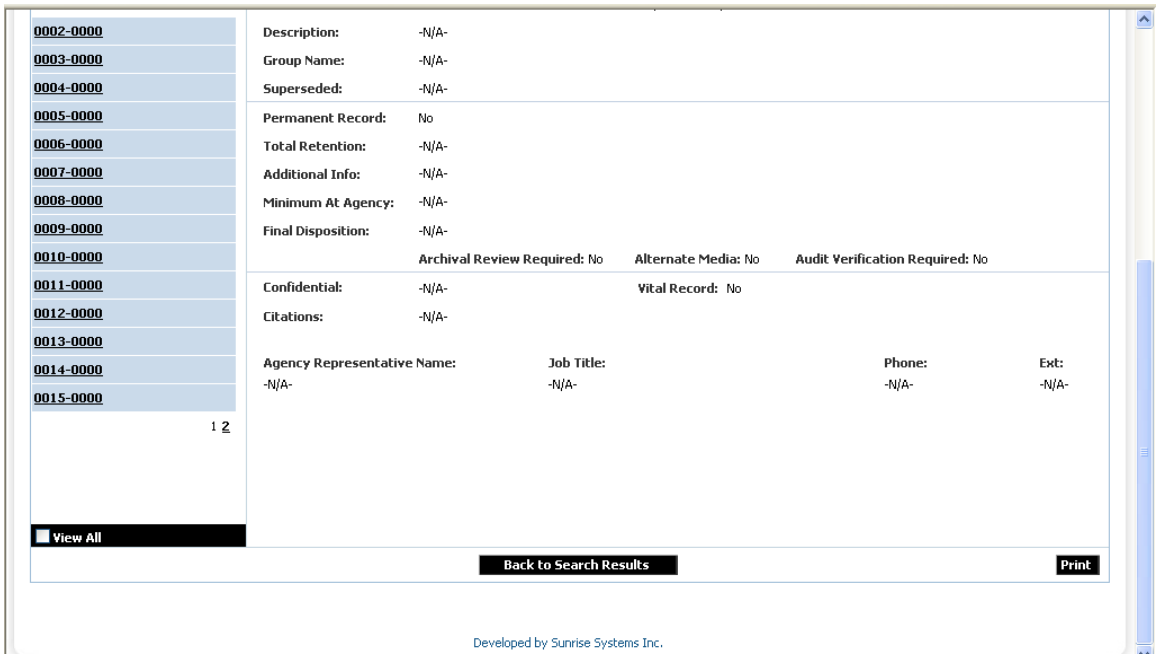
Search Retention Schedule page is available from the home page, by clicking on the Search Retention Schedule link in the Retention Schedule tab or by selecting Search Retention Schedule menu item from the Retention Schedule menu. User can **search** on any of the individual or combination of parameters 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



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.



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

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.

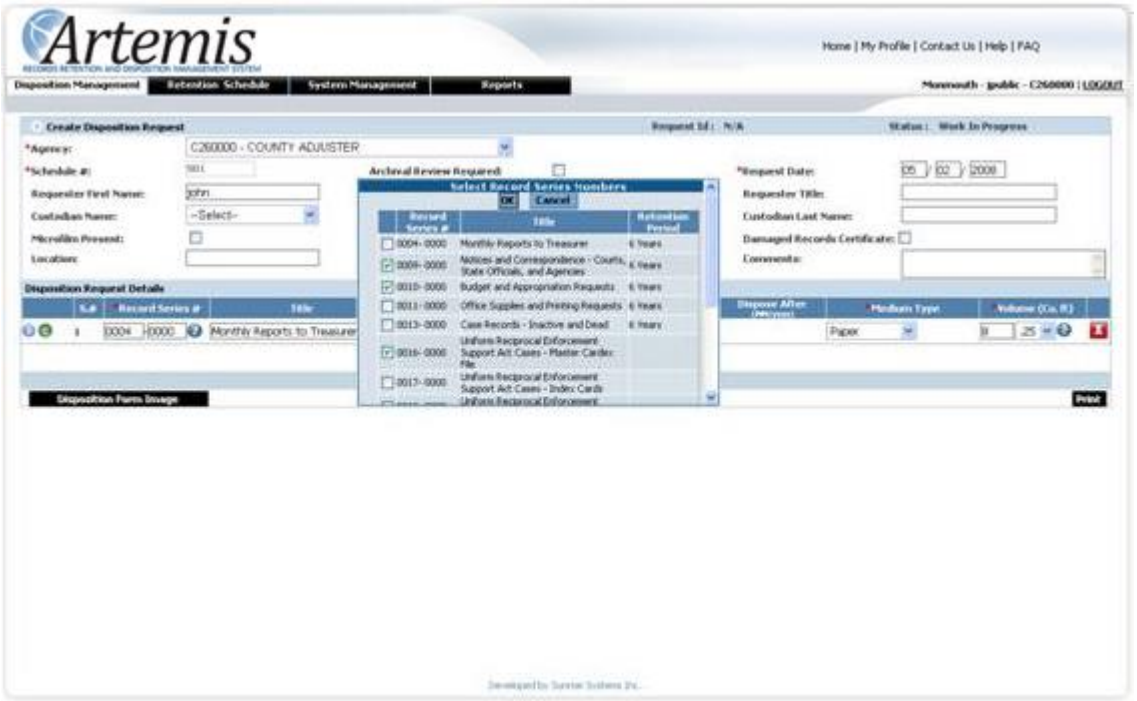
Once a **Record Series #** is entered, the **Record Series Title** and **Retention Period** are automatically populated. **Retention period** is not populated, if it does not exist in the retention schedule or if the **retention period** is based on specified events in the retention schedule.

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.

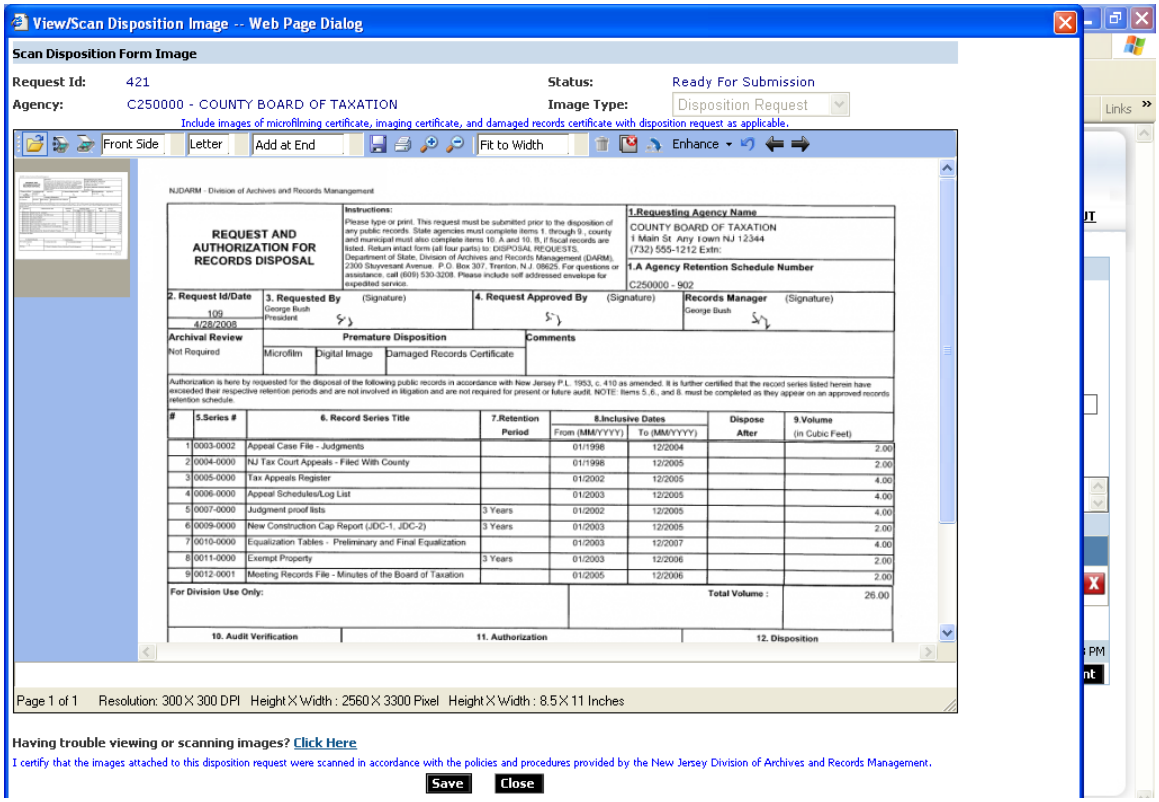
If the user wants to enter multiple record series numbers they can select the **Add Multiple Rows** button. A pop up is displayed with a list of applicable **record series numbers**, their **titles** and **retention periods**. User can click on the selection box to the left of the **record series number**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

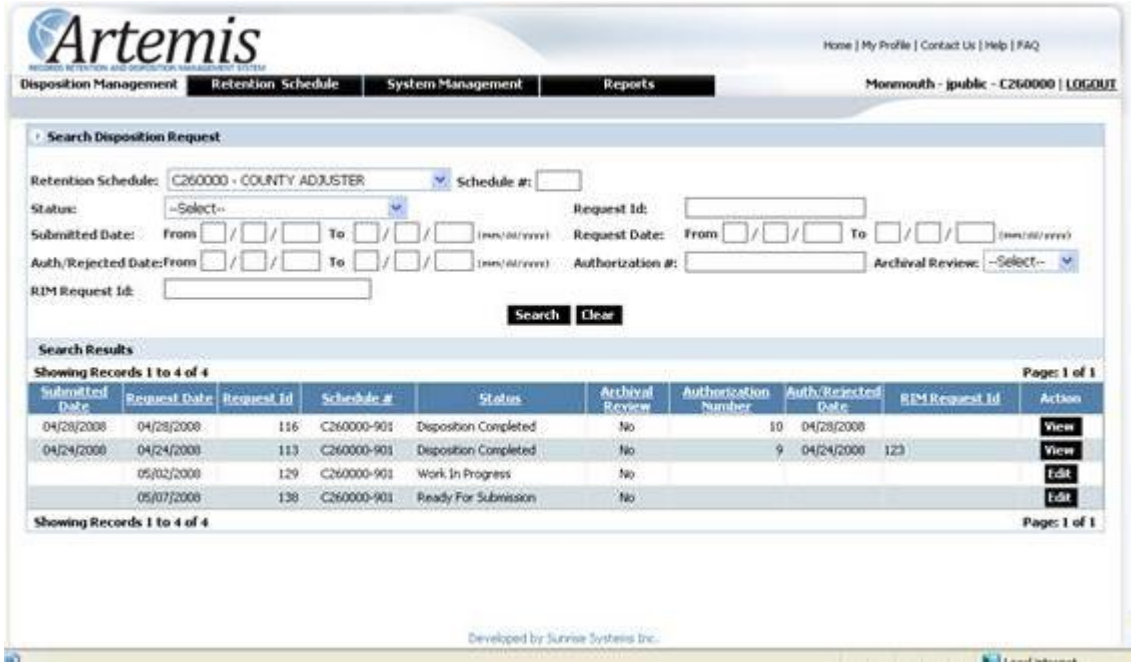


The following features are available on the **View Scan Disposition Image** page.

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.

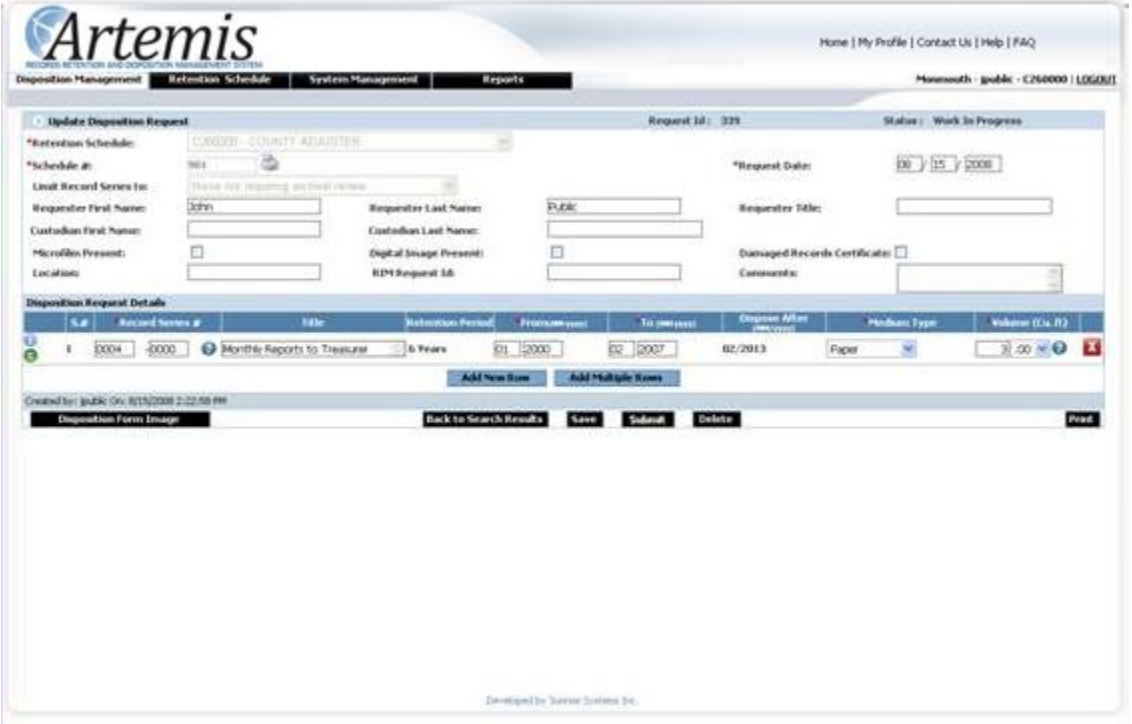
Search Disposition Request



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



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.

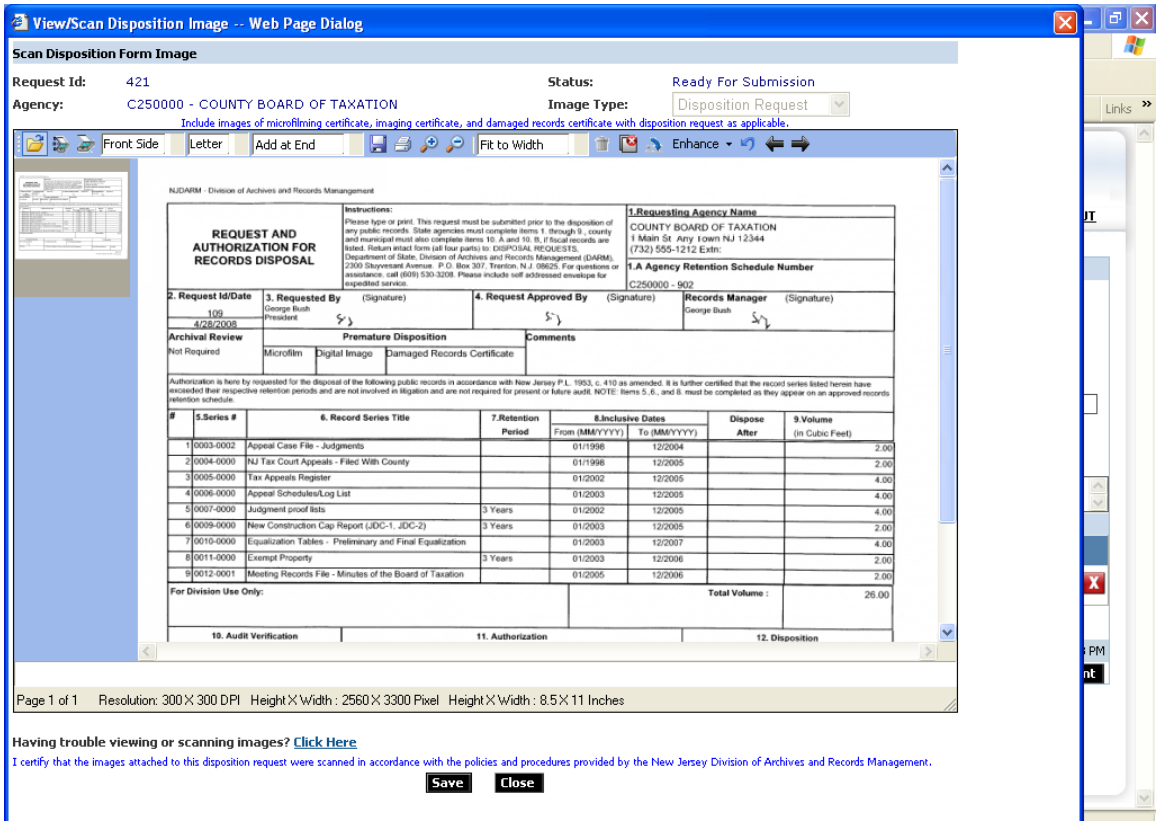
Dispose After date is populated as a guideline for when a set of documents (detail line) on the disposition request represented by a record series # are eligible for disposition. **Dispose After** date will not be populated if **Retention Period** is not populated or if the **Dispose After** date is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



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

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**.

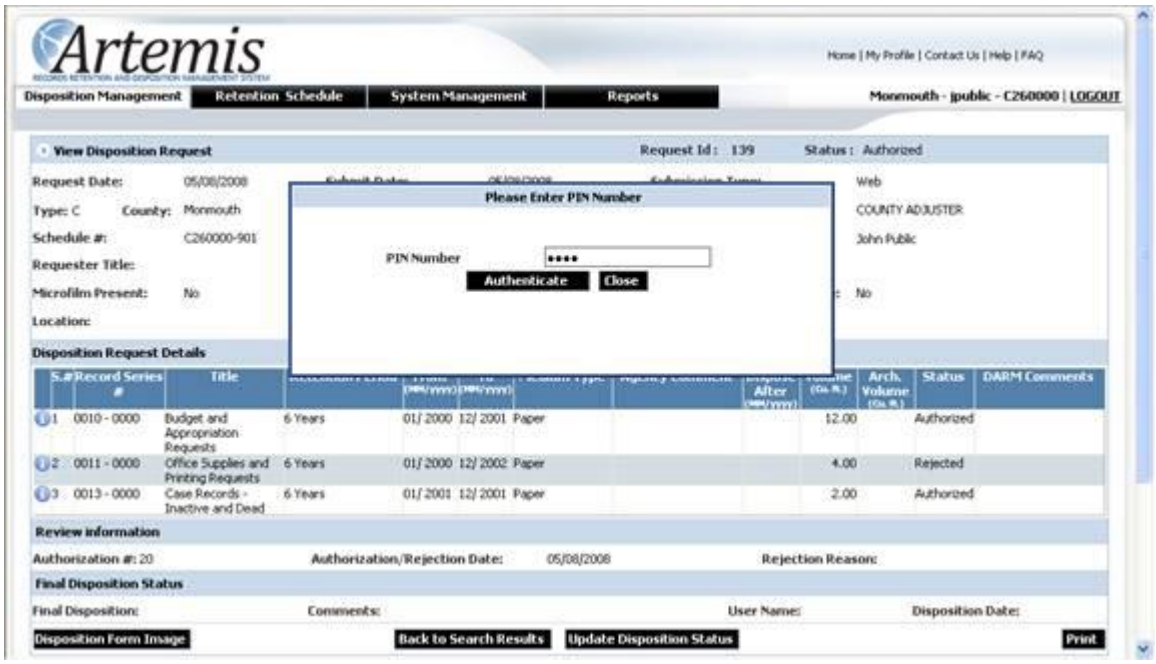
Disposition Requests in the following **statuses** can be **viewed**:

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.

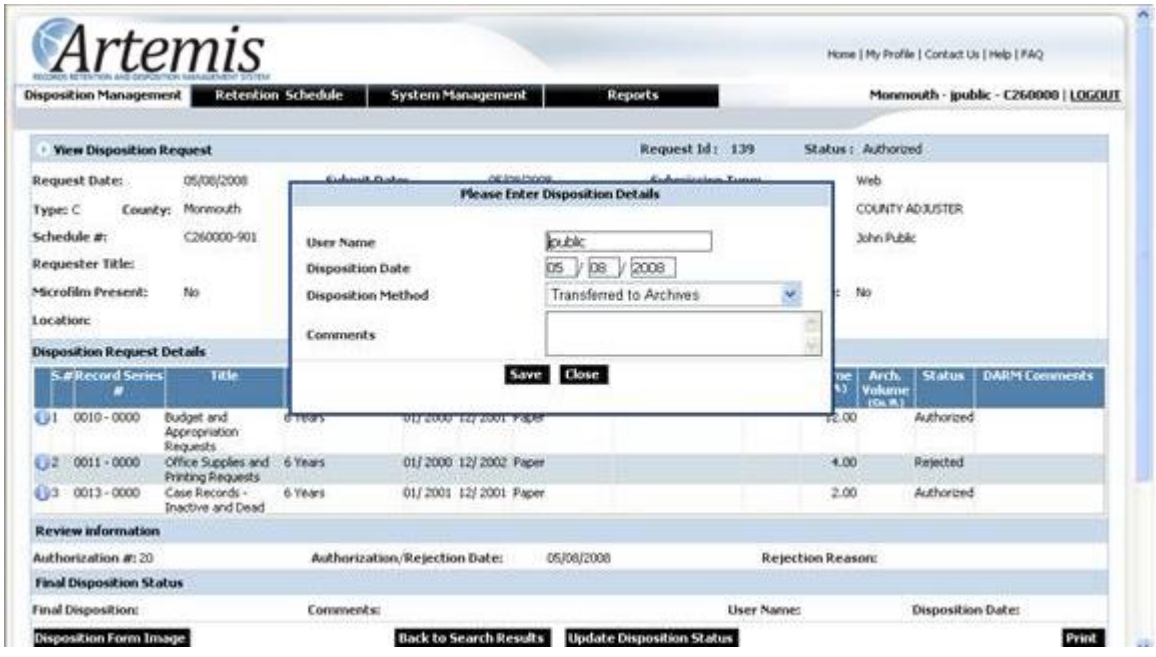
The entire screen is read only except the **Update Disposition Status** button for disposition requests in **Authorized** status. Once disposition of authorized documents has

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.

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.