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MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Revised Memorandum of Instruction (MOI), The Army Records Information Management System (ARIMS) for TRADOC Units and Organizations

1. REFERENCES:

　　a. AR 25-400-2, (The Army Records Information Management System).

　　b. Federal Records Act of 1950.

　　c. The United States Army Records Management and Declassification Agency (USARMDA) Army Consolidated Records Schedule (ACRS) Quick Reference Guide.

　　d. The USARMDA ARIMS User Guide.

　　e. AR 25-59, (Office Symbols).

　　f. OMB Memorandum M-23-07, (Transition to Electronic Records) 23 December 2022.

　　g. TRADOC Office of the G-6, (Records Management Training).

　　h. DA PAM 25-403 (Army Record Management Program).

2. PURPOSE: To establish Records and Information Management (RIM) as a portion of Army Information Management IAW AR 25-400-2. This MOI prescribes policies and assigns responsibilities to properly manage information from its creation through final disposition, according to Federal Laws and Army records management requirements.

3. DEFINITION:

　　a. Records management is the planning, controlling, directing, organizing, training, promoting, and other managerial activities involved with respect to records creation, records maintenance and use, and records disposition in order to achieve adequate and proper documentation of the policies and transaction of the Federal Government and effective and economical management of Army operations. Records management significantly contributes to the smooth operation of the Army's programs by making information readily available when needed for effective decision-making. Army records can be found in all media formats: paper, email, instant messaging, chat and text messages, telephone messages, voice mail messages, presentations, websites, social media, word processing documents, spreadsheets, and information systems. If the information is not a record, then such information would be categorized as either a non-record or personal paper. Additionally, records management—

　　　(1) Safeguards the rights and interests of the Army and its Soldiers and DA Civilians.

(2) Protects records from inappropriate and unauthorized access.

(3) Provides continuity in the event of a disaster.

b. The RRS–A is the records retention schedule approved by NARA and the only legal authority for destroying non-permanent Army information. Record information will be identified and managed in ARIMS, according to either short term or long term, based on their value to the business process.

4. DISCUSSION:

a. This MOI scopes the required Army directive to keep all records in an electronic format and to utilize ARIMS for retention. According to the Federal Records Act of 1950, effective records management is an important tool for efficient government operation. Without adequate and readily accessible documentation, agencies may not have access to important operational information to make decisions and carry out their mission. Refer to AR 25-400-2 for the purpose, responsibilities, statutory authority, and the application and principles of ARIMS.

b. This MOI establishes responsibilities, policies, and procedures for U.S. Army Maneuver Support Center of Excellence (MSCoE) Record Information Management (RIM). The RIM program, for the purpose of this MOI, governs the capture, maintenance, and disposition of Army information and includes record keeping, office symbol management, and information management control (IMC) requirements established in public law and regulatory guidance.

c. This MOI affixes responsibility on MSCoE organizations to include commanders, commandants, and directors to manage and safeguard Army records throughout their lifecycle from creation through final disposition.

5. ROLE DEFINITIONS: Everyone is responsible for managing records. Designated personnel will be assigned roles to oversee various aspects of the Army Records Management Program at different levels, these are Records Manager Officials (RMOs):
RMOs within the organization will receive records management training annually, see encl 1 for instructions. RMOs (in hierarchical order) are records administrators (RAs), records managers (RMs), and records coordinators. See mandatory procedures prescribed in DA Pam 25–403 for the list of duties and responsibilities for RMOs.

6. ROLE RESPONSIBILITIES: According to the Federal Records Act of 1950 and Title 44 U.S. Code, Sections 3301-3314 all roles are subject to pecuniary action of a fine or up to 3 years in prison.

a. Commandants, commanders, and directors are charged with ensuring official records are created and preserved throughout their units and organizations in accordance with established records procedures. They will appoint primary and alternate records managers (RM) and

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records coordinators (RC) who will execute functions assigned IAW AR 25-400-2 and ensure RMs and RCs complete required training.

    b. Records Managers.

        (1) Establish office symbols and maintain historical reference of office symbols for each of their respective organizations and submit to the Administrative Services Division on Fort Leonard Wood and the TRADOC G-6 SharePoint site.

        (2) Establish and maintain the record coordinator appointment letters and approvals in ARIMS.

        (3) Approve Office Records List (ORL).

        (4) Approve release of requested documents. This does not include FOIA requests.

    c. Records Coordinators.

        (1) Create ORLs for each office symbol they are responsible for by function: i.e. G-1; DEI; CDTF, etc. The United States Army Records Management and Declassification Agency (USARMDA) Army Consolidated Records Schedule (ACRS) is a system which enables you to more easily organize how records are categorized. The ACRS Quick Reference Guide version 2.1 provides instruction in creating ORLs (see encl 2).

        (2) Maintain an annual folder established per year. Folder naming convention is only characters a-z, numbers 0-9, underscores and/or hyphens. Do not use periods.

        (3) Maintain files within the folder using the Records Retention Schedule Army (RRSA) numbers and title (see encl 2). Ensure you use enough information in your title to be able to utilize a search function. ACRS Big Buckets Structure is below to assist with locating categories in the RRSA (encl 2):

        (4) Files will be maintained electronically and retained on the organization's shared drive if retention is 0-6 years; files will be uploaded in ARIMS if retention requirements are >6 years.
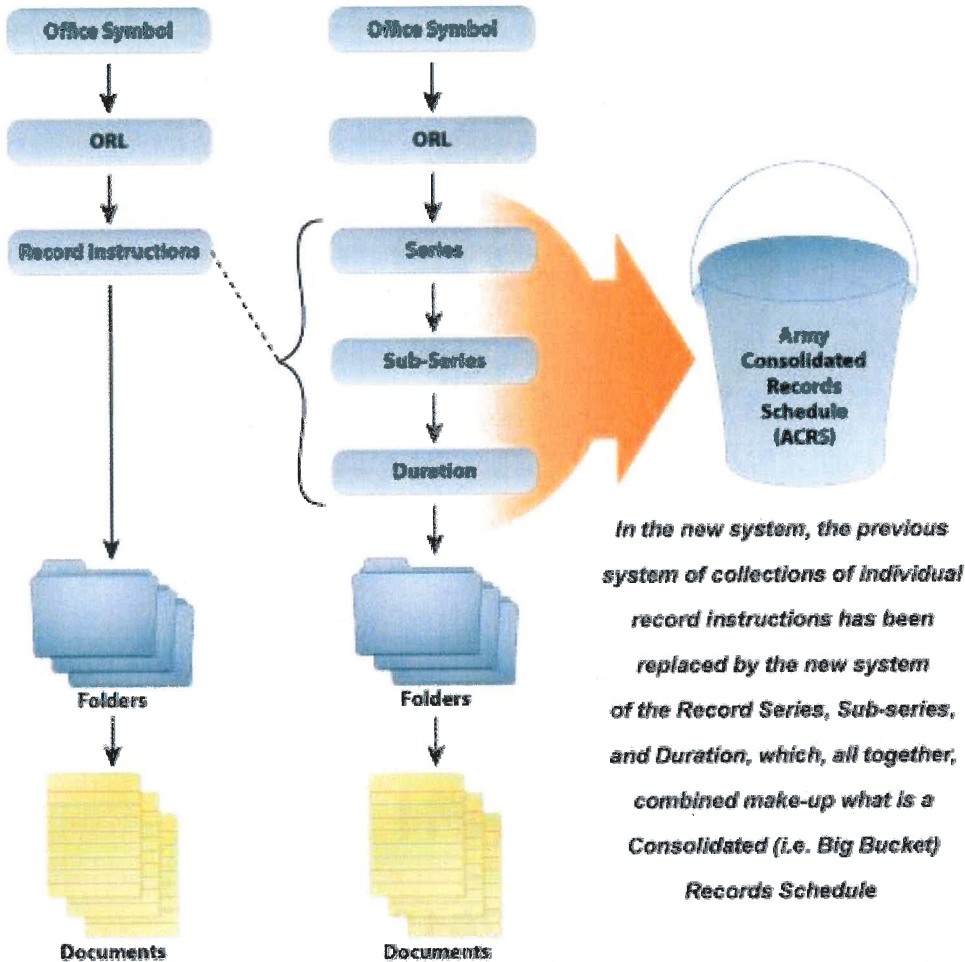
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CONOPS 100	Installation Management 200	Operations and Security 300	Information Management 400	Medical 500	Personnel 600
100A	200A 200B 200C 200D	300A 300B 300C 300D	400A 400B 400C	500A 500B 500C	600A 600B 600C 600D 600E

Logistics 700	Administration 800	Emergency and Safety 900	Legal 1000	Finance and Audits 1100	Quality Assurance 1200
700A 700B 700C	800A 800B 800C 800D	900A 900B 900C	1000A 1000B	1100A 1100B	1200A 1200B 1200C 1200D

Figure 1: ACRS Big Buckets Structure

   d. Action Officers. Maintain folders with records in an organized fashion and submit to record coordinators on a monthly basis for the required upload into ARIMS as appropriate.

7. Mandator training for all Army personnel is through the ALMS Portal, course name Records Management Training Course.

8. The proponent for this MOI is the Office of the Secretary of the General Staff at (573) 563-6154.

MARK E. GLASPELL
Colonel, GS
Chief of Staff

2 Encls
1. USARMDAS ACRS Quick Reference Guide
2. RRSA (electronic copy)

DISTRIBUTION:
All TRADOC Schools, Brigades, Battalions, Companies, Directorates, General Staff and Personal Staff Offices

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Enclosure 1

United States Army Records Management and Declassification Agency (USARMDA)

Army Consolidated Records Schedule (ACRS) Quick Reference Guide Version 2.1

Prepared by

INTERGRAPH

August 13, 2013

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What is the Army Consolidated Records Schedule (ACRS)?

ACRS is the new method for organizing how records are categorized. It is based on three categories, Series, Sub-Series, and Duration. The thousands of Records Retention Schedule-Army (RRS-A) record instructions that existed before the ACRS (or "Big Buckets") are now consolidated and organized into pre-defined Record Series and Sub-Series, along with three broad retention periods — durations – 0-6 Yrs., 6+ Yrs., Permanent. A record no longer has a record instruction applied to it as it did before the ACRS implementation; rather, a record is determined to fall under a series, a sub-series, and a length of time (duration) that it will be held onto before it receives its final disposition (i.e., transfer or destroy), as shown in Figure 1.

Figure 1 – Record Instructions Now Become Consolidated Record Schedules, as Series, Sub-Series, and Duration

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How It Works

Previously, in ARIMS, users would create Office Records Lists (ORLs) at the beginning of each calendar year for each Office Symbol under a particular unit. The ORL would be created by using the available options for creating a new ORL from Scratch, by copying the ORL from the previous year, or by pulling the ORL from the library. Then, the user would choose from the thousands of record instructions available in the RRS-A and apply those individual record instructions to the folders in that ORL; this could be a tedious and time consuming task. The folders would then be used to maintain documents and records either electronically or as hardcopy, according to policy, for that particular year.

That system for categorizing and managing records for an office symbol required degrees of individual attention and custom organization by a Records Manager for his/her unit and the associated office symbols. But, that system is now replaced by the new ACRS of pre-defined series or "buckets" that will replace a large portion of the custom organization and work involved, which was so necessary in the previous system.

Now, with the implementation of the ACRS, at the beginning of every year, a unit will determine the ORL for an office symbol by similar means to that of the past, by creating an ORL from scratch, or by copying an existing ORL, or by creating an ORL from a library of ORLs. However, what will be different is that the new ACRS series will replace the previous system of individual record instructions, by either updating existing ORLs automatically to contain the new ACRS series, or by creating new ORLs and setting-up the ACRS series and sub-series therein.

Crosswalk

The Crosswalk is a reference guide explains how pre-ACRS record instructions relate to the new Series and Sub-series of Big Buckets. The Crosswalk will help records officials understand how to manage new records that have had dispositions applied to them after the implementation of ACRS, and for understanding how to handle existing records that receive new dispositions. Available in ARIMS is a Quick Reference Crosswalk, which can be found on the **Search** tab by clicking on **Search Crosswalk** in the left menu, then **Quick Reference-Crosswalk** in the blue navigation bar. There is also a **Detailed Reference Crosswalk**, which can be found at by clicking on **Detailed Reference-Crosswalk** in the blue navigation bar.

The **Quick Reference Crosswalk** shows Series and Sub-series and the record numbers from the previous system that fall into the new categories, as shown in Figure 2.
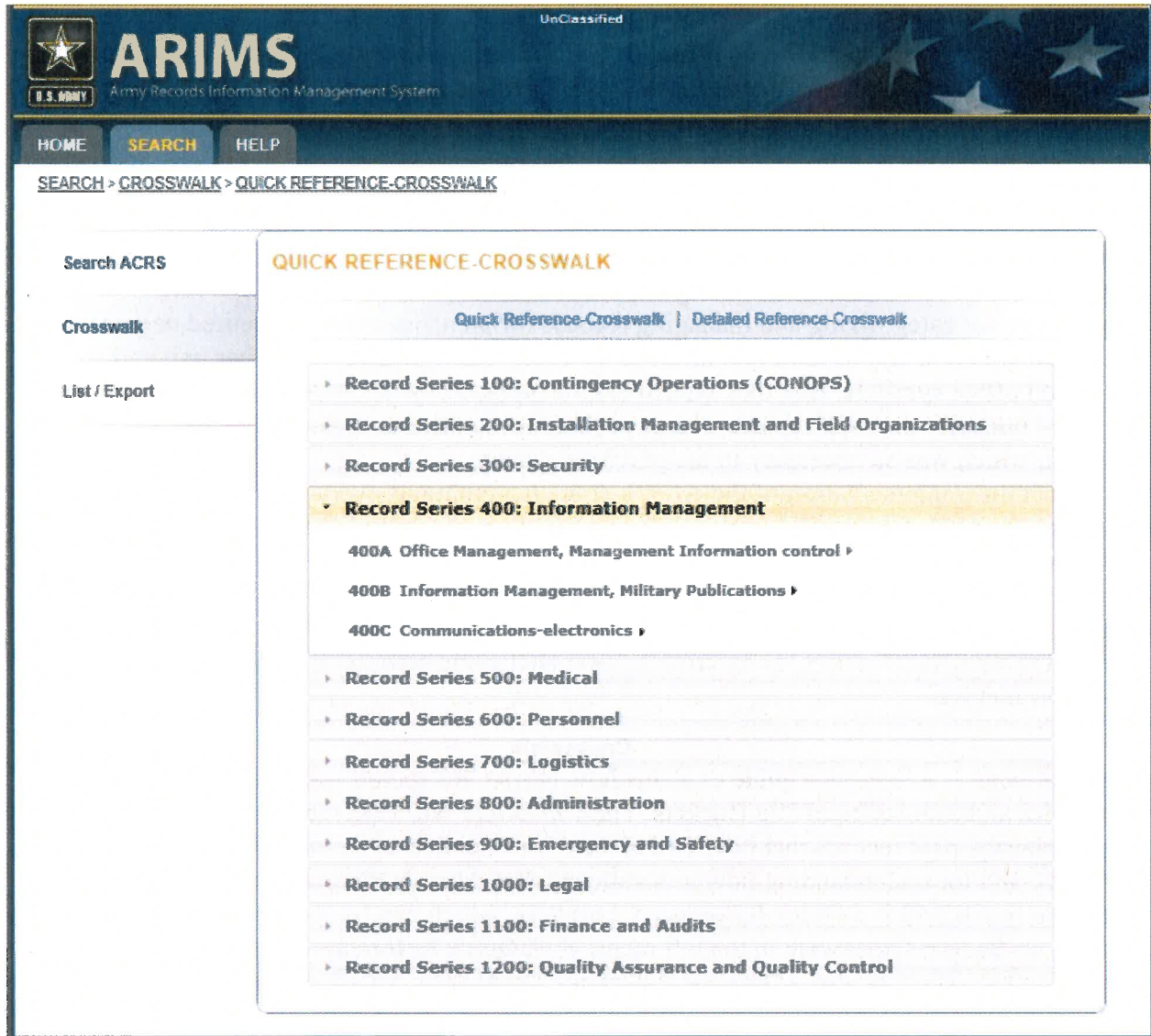
Figure 2 – Quick Reference Crosswalk

The **Detailed Reference-Crosswalk,** accessible by clicking on the title in the blue
navigation bar, displays a search screen that will allow you to search for a record's new Series
and Sub-series number. You may search by entering data in **Old Record Number** or
Prescribing Directive and then clicking **Get Crosswalk**, as shown in Figure 3. You may

also select a Record Series, Sub-series, and Duration from the drop-down lists, and click **Get Crosswalk** to see a list of all Record Numbers that now fall under a particular Sub-series.
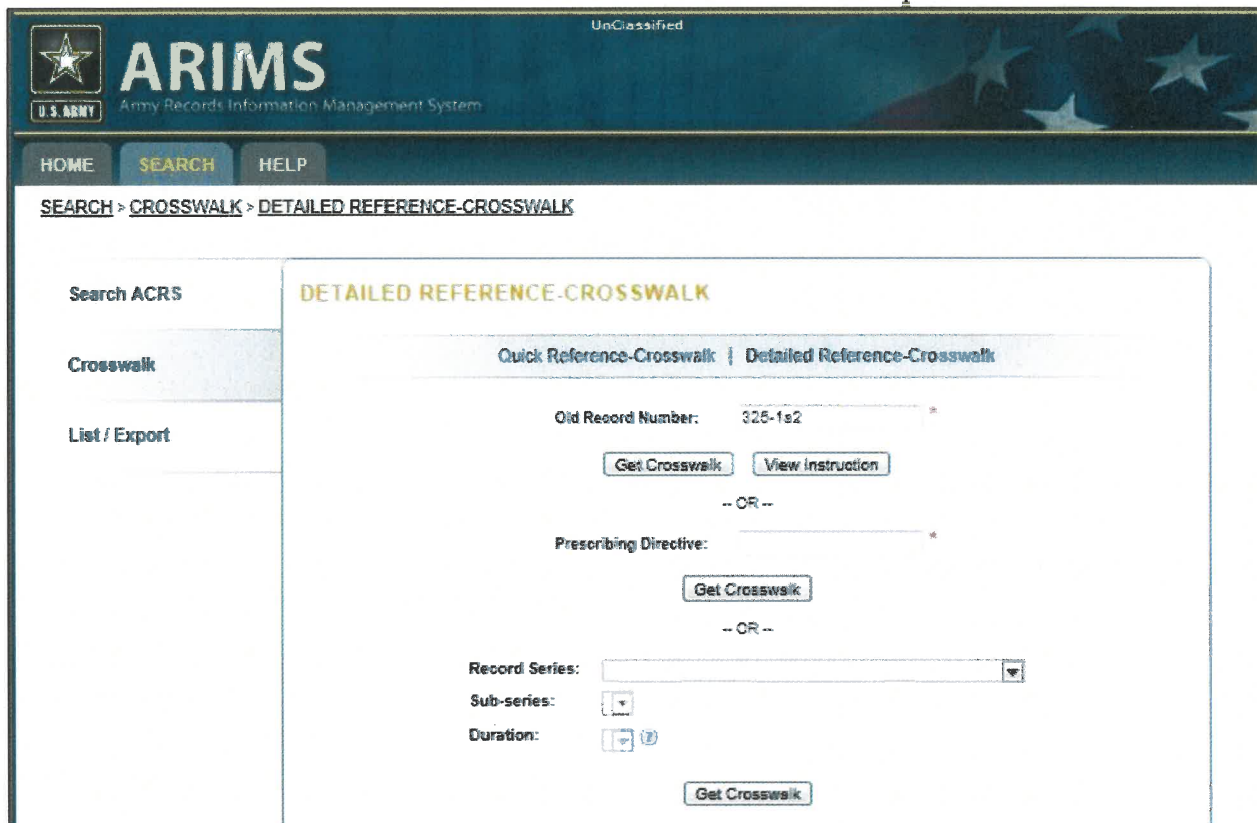
Figure3 – Detailed Reference Crosswalk

Creating ORLs

For the ARIMS user, the creation of ORLs will seem mostly the same as it had been before ACRS whenever the user is copying an existing ORL or pulling from a library, as the new functionality of setting-up the correct series/ buckets will simply occur automatically. For copies of preexisting ORLs, the ARIMS software technology converts the existing ORL and Record Instructions into the new pre-defined series/buckets. However, for all new ORLs, a few easy steps will allow the user to quickly set-up buckets within the new ORL.

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ORLs from Scratch

For users **ORLs & Folders** upper navigation tab
• Choose **Office Records List** from the left menu.

☐ Choose **Create ORLs/ Create from Scratch** from the blue and yellow menu bars, respectively.

• The **Create Office Records List From Scratch** page will appear, as shown in Figure 4.

Figure 4 – Create ORLs from the ORLs & Folders menu tab and choose Office Records List → Create ORLs → Create from Scratch

On the Create Office Records List From Scratch page:
• The user will choose the **Office Symbol** from the dropdown

- Enter the **Name** of the ORL in the name text box

- Choose the **Year** of the ORL from the dropdown, and click the **Create ORL** button

- This will create an <u>ORL</u> which contains <u>no record instructions</u>; but, this ORL is now ready to have "buckets" defined and populated with ACRS series, sub-series, and durations to create folders (hardcopy or electronic)

Add ACRS Series to ORLs Created from Scratch

For users creating an ORL from Scratch, once the ORL has been created, go to the **List ORLs** page to begin the process of adding ACRS series, sub-series, and durations to ORLs. The user will:

- Click on the **ORLs & Folders** upper navigation tab.

- Then choose **Office Records List** from blue menu bars.

- The **List of ORLs** page will appear, as shown in Figure 5.
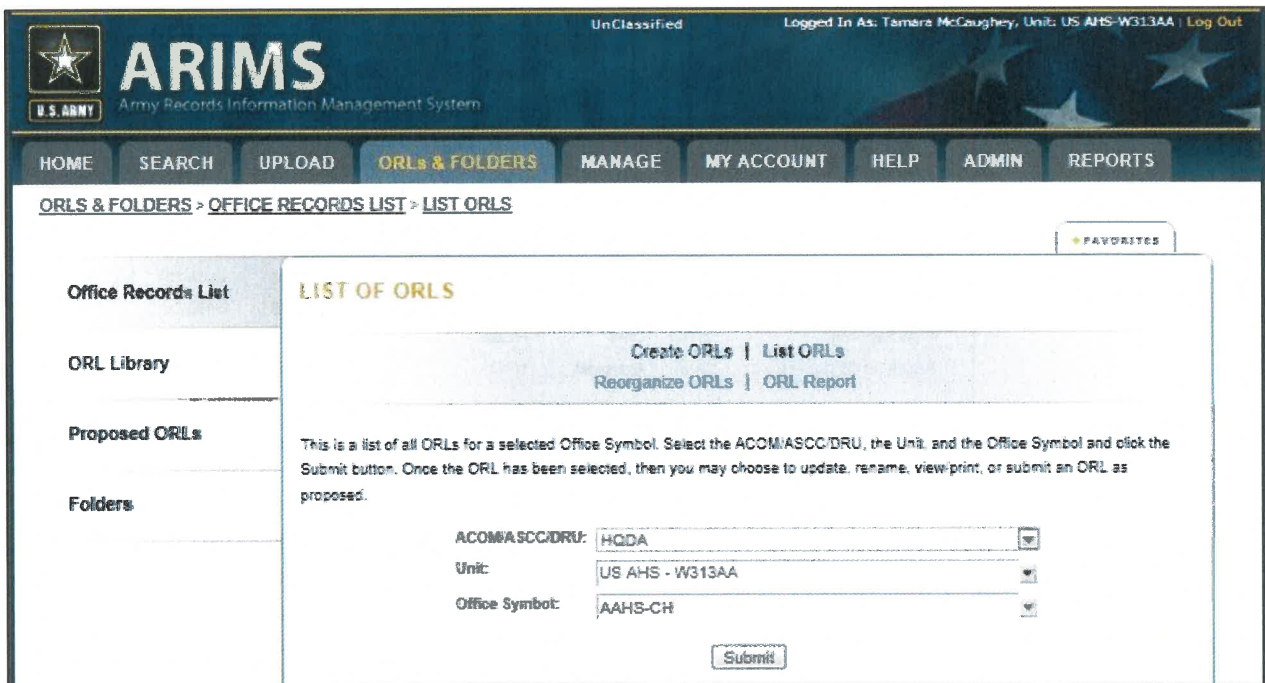
Figure 5 – Navigate to the List of ORLs page to Begin Adding ACRS series, sub-series, and durations "Buckets" to ORLs

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On the List of ORLs page, the user will:
- Choose the **ACOM/ASCC/DRU**, the **Unit**, and the **Office Symbol** from the dropdown menus and click the **Submit** button.
- Then, the page will refresh with the list of the ORLs.

Figure6 — Select the ORL and Edit

- With the list of ORLs available to the user, the user will then click on the hyperlink, which is the **ORL Name** of the ORL to which the user would like to add ACRS series, sub-series, and durations.
- The ORL will then be highlighted with a blue background, as shown in Figure 6.
- Then, with the ORL highlighted, click on the **Edit** button.

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- Once the user has clicked the Edit button, the **Records Management - ORL Details** page will appear .
- On the ORL Details page, there will be a button for adding Add Record Instructions, as shown in Figure 7.

ORL DETAILS

2014-kjhfulkyg

Office Symbol: AAHS-CH
ORL Name: 2014-kjhfulkyg

	Record Sub-series	Record Number	Retention Period	Status
☐	700B	700B	6+	Approved
☐	800C	800C	6+	Approved
☐	900A	900A	0-6	Approved
☐	900A	900A	Perm	Approved

Remove | Add Record Instructions | Close | Print Summary | Print Details

Figure 7 – ORL Details

- Click the **Add Record Instructions** button.
- Once the user has clicked on the **Add Record Instructions** button, the **ACRS Search** page will open.
- On the ACRS Search page, as shown in Figure 8, the user will either enter a keyword into the Search by Keyword search box, or select from the dropdown menus for Record Series, Sub-series, and Duration.

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Figure 8 – ACRS Search

- Once the user has entered a Keyword or selects the Record Series, Sub-series, and Duration, the user will click the **Submit Search** button and the results will then appear.

- Then, the user will check the checkbox beside the ACRS series/bucket to be submitted (as a proposed record instruction in the new ORL)

- With the checkbox checked, the user will click the **Submit** button to submit the new record instruction for addition to the ORL for approval, as shown in Figure 9.

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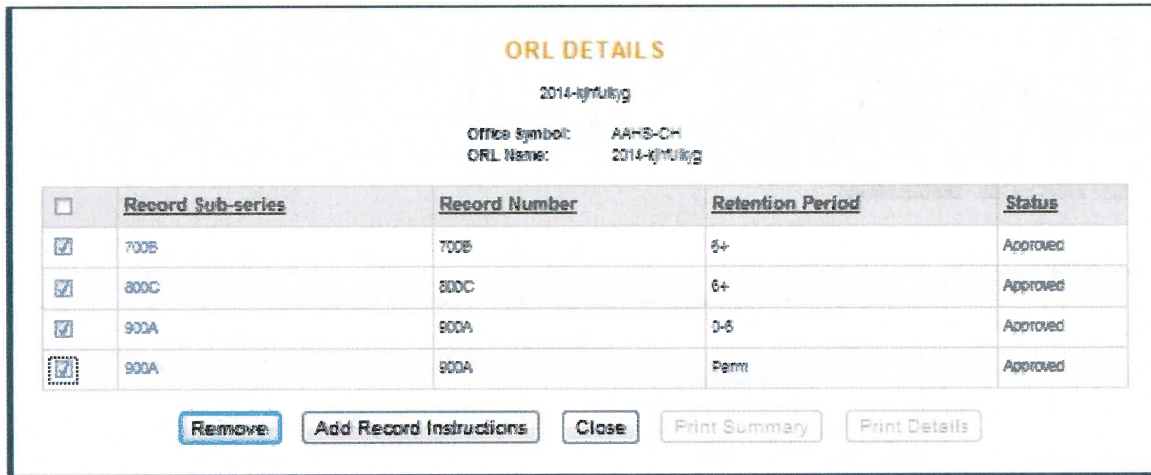

Figure9 – Search Results

After the user has submitted the new ACRS record instruction for approval, the user will return to the ORL Details page where the proposed instruction will now appear with the **Status** listed as **Proposed.**

The user will need to return to the List of ORLs page and **Submit as Proposed** for approval, as shown in Figure 10.
Once the proposed ORL has been approved by a Records Manager or Administrator, it will appear in the ORL Details as **Approved** and the ORL is now ready for use.

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Figure 10 – ORL Details with Approved Status

ORLs by Copy

For users creating an ORL from Copy, the user will:

- From the ORLs & Folders>Office Records List page, click **Create ORLs**, then click **Create by Copying** in the yellow navigation bar, as shown in Figure 11.

- Select the Office Symbol and the ORL from which to make a copy.

- Enter the name for the new ORL and select the applicable year.

- You must choose and select the **Copy Folders** option.

- Finally, click the **Create ORL** button. If successful, an "ORL created" message box appears.

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Figure11 – Create ORL by Copy

ORLs from Library

For users who wish to create an ORL from an ORL Library, the user will:

- From the **ORLs & Folders>Office Records List** page, click **Create ORLs**, then click **Create from Library** in the yellow navigation bar, as shown in Figure 12.

- Be sure the Office Symbol is correct, enter a name for the new ORL, and select the year.

- Then use the checkboxes to select a **Library Name**, and then click **Create ORL** at the bottom of the screen.

Newly created ORLs will be saved as a *Draft* ORL and may have other record series added or deleted from it. Once the ORL is completed, you must submit it as a *Proposed* ORL for approval by the appropriate records official.

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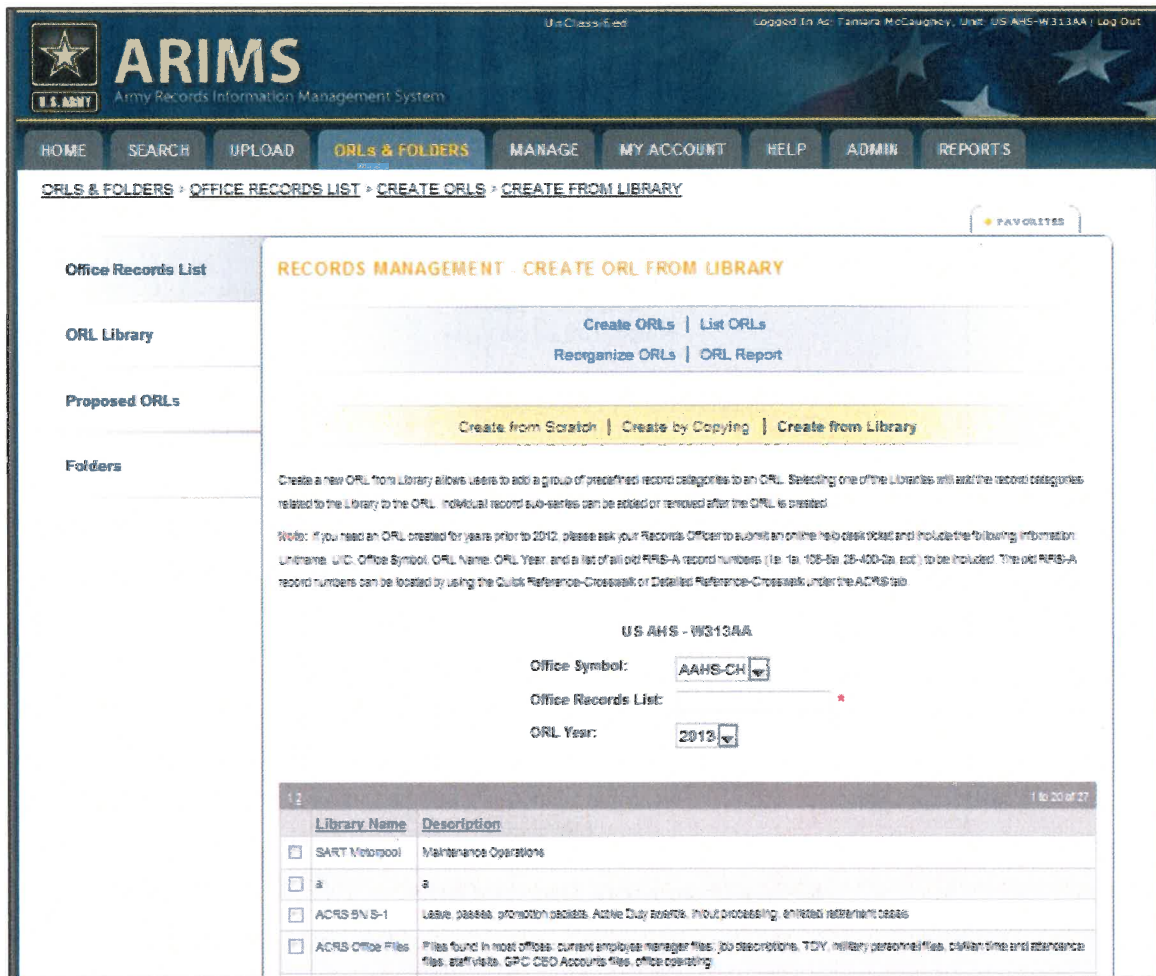
Figure 12 – Create ORL from Library

Creating Folders

After creating ORLs and obtaining approval, the next steps will be setting-up Folders with the
Series, Sub-Series, and Durations defined. Once the Folders have been set-up, documents and
other appropriate records can then be maintained within the proper Folders.

The user will:

- To create a folder, select the **ORLs & Folders** tab, then click **Folders** in the left menu, and
  then click **Create Folders** in the blue navigation bar.

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On the **Create Folders** page, the user will:
- Choose the **Office Symbol** from the first dropdown menu.
- Then choose the **Office Records List** from the next dropdown menu.
- The **Create Folders** page appears, as shown in Figure 13.

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ARIMS
Army Records Information Management System

HOME | SEARCH | UPLOAD | ORLs & FOLDERS | MANAGE | MY ACCOUNT | HELP | ADMIN | REPORTS

ORLS & FOLDERS > FOLDERS > CREATE FOLDERS

+ FAVORITES

Office Records List

ORL Library

Proposed ORLs

Folders

RECORDS MANAGEMENT - CREATE FOLDERS

Create Folders | Delete Folders
List Folders | Vital Record Review

This screen allows you to create multiple electronic or hardcopy folders at one time. To create folders, enter the folder names, one per line, into the Names field and click the Add Folder button. All folders that are created will be identical except for the name; they will be based on the same record instruction from the same ORL, and in the same year. They will all be in the same Special Collection, if applicable.

A folder may be removed from the creation list by clicking Delete before clicking the Submit button. Once all folders have been added, click Submit to create the folders and to print labels for any hardcopy folders that were created.

If you have multiple hardcopy records that will occupy more than one folder, use the Multi-part checkbox and enter the total number required in the Count field.

Note: The following character restrictions apply to electronic folder names if they will be used in the SharePoint System ~ ' # % & * ; < > ? / \ { | }. Additionally, the name cannot begin or end with a dot and cannot contain consecutive dots.

US AHS - W313AA

Office Symbol:	AAHS-CH
Office Records List:	
Record Series:	
Sub-series:	
Duration:	? Use RRSA...
Event Driven:	☐
Event Description:	
Names of New Folders:	

☑ Electronic ☐ Hard Copy

Vital Record:	☐
Multi-part:	☐ Count:
	☐ Show count in folder name?
Privacy Act:	☐
Calendar Year or Fiscal Year?	⦿ Calendar Year
	○ Fiscal Year
Indexing for a Special Collection:	○ Yes ⦿ No
Special Collection:	
Freeze Code:	○ Yes ⦿ No

No freeze codes have been assigned to the above folder.

Add Folders

You must add folders before you submit for creation.

Submit

Figure 13 – Create Folders

- Select the Office Symbol and ORL in which you wish to create a folder. Select the appropriate Record Series and Sub-series and enter a name for the new folder.

- Then select from the **Other Retention Period** dropdown menus (for the 0-6 Yrs. and 6+ Yrs.
retention periods only) and make the proper selections for any other retention period that may apply to records in the Folder(s) created

- Next, the user will then enter the name of the new folder in the **Names of New Folders** text box

- Then the user must choose with **Electronic** records or **Hard Copy** records (if the records in that Folder will be Hard Copy records, the user must choose if the page count will be entered by checking the **Count** checkbox and entering in the number of pages, and the user must also choose to either show the page count in the Folder name or not by either checking or leaving unchecked the **Show count in folder name?** checkbox)

- After making the Electronic or Hard Copy selections for this folder(s), the user must choose if the records in this folder will be Vital Records or not by checking or leaving unchecked the **Vital Record** check box

- Then, the user will select **Yes** or **No**, if there will be **Indexing for a Special Collection** (if Yes, you must choose a Special Collection from the dropdown menu)

- Then, the user will check if this folder(s) is subject to Privacy Act considerations or not by checking or leaving unchecked the **Privacy Act** checkbox

- The user must choose the type of year for this folder by selecting either the **Calendar Year** or **Fiscal Year** radio button

- Then, once all of the folder criteria has been selected, the user will click the **Add Folders** button and the folder(s) that the user has chosen to add will appear in a list box

- Finally, the user will click the **Submit** button and the folder(s) has been created (if the Folders that were created are Hard Copy folders, the user is taken to the **Print Labels** page where the user can choose among several options for saving and printing labels for Hard Copy folders)

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Review Folders on List Folders Page

After creating folders, users can review the folders for a particular Office Symbol and Office
Records List by reviewing the List Folders page:

- Select the **ORLs & Folders** tab→ select **Folders** in the left menu

- Then select **List Folders** in the blue navigation bar

- There the user will select the specific **Office Symbol** and **Office Records List** from the
  dropdown menus

- Select the Folder Type

- The available folders will appear, as shown in Figure 14.

Figure 14 – List Folders

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Records and Dispositions

All records that are created after the implementation of ACRS will have the proper Record Series, Subseries, and Duration applied to those records by the proper Disposition Authority at the time of classification. Once ORLs and Folders have been set-up for an Office Symbol, all Electronic records are moved into and stored in the appropriate, corresponding electronic folders. If Hard Copy folders have been created, all appropriate and corresponding hard copy records will be placed within the proper folders at the time of disposition and maintain in the appropriate RHA.

For records that have had dispositions placed upon them before or outside of the implementation of ACRS, records officials will need to refer to the Crosswalk Reference to determine where new records, and/or records that have received new disposition determinations, will be stored and maintained by relating previous record instructions to the new Series, Sub-series, and Duration disposition criteria.

Both the previous record instructions system (RRS-A) and the new consolidated records system (ACRS) will be available for users to reference, because there will be a long-term need for maintenance of records that have received dispositions before ACRS.