

DEPARTMENT OF THE ARMY U.S. ARMY MANEUVER SUPPORT CENTER OF EXCELLENCE 14000 MSCoE LOOP, STE 316 FORT LEONARD WOOD, MISSOURI 65473-8300

ATZT-SGS (1e)

2 5 AUG 2023

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.

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(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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1: ACRS Big Buckets Structure

2 Encls

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

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

Chief of Staff

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



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.

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<u>RCH</u> > <u>CROSSWALK</u> > <u>O</u>	UICK REFERENCE-CROSSWALK
earch ACRS	QUICK REFERENCE-CROSSWALK
rosswalk	Quick Reference-Crosswalk Detailed Reference-Crosswalk
ist / Export	Record Series 100: Contingency Operations (CONOPS)
	Record Series 200: Installation Management and Field Organizations
	Record Series 300: Security
	* Record Series 400: Information Management
	400A Office Management, Management Information control >
	400B Information Management, Military Publications >
	400C Communications-electronics >
	Record Series 500: Medical
	Record Series 600: Personnel
	Record Series 700: Logistics
	Record Series 800: Administration
	Record Series 900: Emergency and Safety
	Record Series 1000: Legal
	Record Series 1100: Finance and Audits
	Record Series 1200: Quality Assurance and Quality Control

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

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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.

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SEARCH > CROSSWALK > DE	TAILED REFERENCE-CROSSWALK
Search ACRS	DETAILED REFERENCE-CROSSWALK
Crosswalk	Quick Reference-Crosswalk Detailed Reference-Crosswalk
List / Export	Old Record Number: 325-1s2
	OR *
	Get Crosswsik - CR
	Record Series:
	Duration:

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.

	IPLOAD ORLs & FOLDERS	MANAGE	MY ACCOUNT	HELP	ADMIN	REPORTS
& FOLDERS > OFFICE	ERECORDS LIST > CREATE ORLS >	CREATE FROM	SCRATCH			+ PAVBALTES
fice Records List	CREATE AN OFFICE RE	CORD'S LIST	FROM SCRAT	СН		
RL Library			ORLs List ORLs ORLs ORL Repo	t		
roposed ORLs	Create fr	om Scratch	Create by Copying	Create from	Library	
olders	Create an ORL from Soratch by selecting the Office Symbol, enter the name or title of the ORL in the Office Records List set to and select the ORL Year. Then, click the Create ORL button. After creation is complete, the ORL can be updated to add record series and retention periods. Note: If you need an ORL created for years prior to 2012, please ask your Records Officer to submit an online help desk ticket include the following information: Unitname, UIC, Office Symbol, DRL Name, ORL Year, and a list of all old RRS-A record num (i.e. 1s, 105-8s, 25-400-2s, ect.) to be included. The old RRS-A record numbers can be located by using the Quick Reference- Crosswalk or Detailed Reference-Crosswalk under the ACRS tab. US AHS - W313AA					
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			E AAHS-CH	*		
		Office Symbo		*		

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

On the Create Office Records List From Scratch page:

• The user will choose the Office Symbol from the dropdown

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- 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.

ES. ARTY Records Infe	MS prmation Management System	UnClassified	Logged Ir	h As: Tamara I	McCaughey, Un	it: US AHS-W313AA Log Out
HOME SEARCH	UPLOAD ORLs & FOLDERS	MANAGE	MY ACCOUNT	HELP	ADMIN	REPORTS
ORLS & FOLDERS > OFFI	CE RECORDS LIST > LIST ORLS					· PAVURITES
Office Records List	LIST OF ORLS					
ORL Library			ORLS LISTORLS ORLS ORL Report	t		
Proposed ORLs	This is a list of all ORLs for a selected Off Submit button. Once the ORL has been a					
Folders	proposed.		•			
and the second se	ACOMA SCC/DRU	HQDA				
	Unit:	US AHS - W	313AA		*	
	Office Symbol:	AAHS-CH				
			Submit			

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.

				UnClassified	Logged In A	s: Tamara McCaughe	
	1S mation Management	System				a f	E.F
DME SEARCH U	IPLOAD ORLS	& FOLDERS	N		MY ACCOUNT	HELP ADM	IN REPORTS
LS & FOLDERS > OFFICE	RECORDS LIST > J	LIST ORLS					
							+ PAVORITES
Office Records List	LIST OF OR	LS					
	Create ORLs List ORLs Reorganize ORLs ORL Report						
ORL Library	-			repurganize O	tra i our repon		
ORL Library Proposed CRLs			ted Offici	e Symbol. Select			fice Symbol and click the submit an ORL as
-			ted Offici	e Symbol. Select	the ACOM/ASCC/DRU,		
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Proposed CRLs	Submit button. One	e the ORL has t	ted Offici been sele C/DRU: [e Symbol. Select ected, then you n	the ACOM/ASCC/DRU, ay choose to update, re		submit an ORL as
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Proposed CRLs	Submit button. One	ACOMMASCO Unit:	ted Offici been sele XDRU: [e Symbol. Select ected, then you n HQDA US AHS - W313	the ACOM/ASCC/DRU, say choose to update, re AA	name, view/print, or	submit an ORL as
Proposed CRLs	Submit button. One proposed.	ACOMMASCO Unit:	ted Offici been self XDRU: [ol: [e Symbol. Select ected, then you of HQDA US AHS - W313 AAHS-CH	the ACOM/ASCC/DRU, ay choose to update, re AA	name, view/print, or	submit an ORL as
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Proposed CRLs	Submit button. One proposed. ORL Name kjöhulkyg	e the ORL has t ACOMEASICO Unit: Office Symbo	ted Offici been sele XDRU: [ol: [<u>Year</u> 2014	e Symbol. Select acted, then you of HQDA US AHS - W313 AAHS-CH Status Approved	the ACOM/ASCC/DRU, ay choose to update, re AA Submit ACOM/ASCC/DRU HQDA	name, view/print, or <u>Unit</u> US AHS	submit an ORL as

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.

	2014-kjhfulkyg		
	Office Symbol: AAH: ORL Name: 2014	S-CH -kjhfulkyg	
Record Sub-series	Record Number	Retention Period	Status
7008	7008	54	Approved
800C	800C	6+	Approved
A009	ADD9	0-6	Approved
900A	900A.	Perm	Approved

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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	MS formation Management System	
Anny Seconds In	ormation management of stern	
ME SEARCH	HELP	
RCH > SEARCH ACRS	SEARCH ACRS INSTRUCTION	
Search ACRS	SEARCH ARMY CONSOLIDATED RECORDS SCHEDULE	(ACRS) IN STRUCTION S
	All users may search the Army Consolidated Records Schedules, which are a component of the Army	Reports information Management System (ARIMS). The
Crosswalk	Records Scredules reflect all National Archives and Records Administration approved refer for and	disabsition information for Army repords.
	You may search by Keyword or Record Series. To start a new search, blick the Reset Form button.	
List / Export		
	Search by Keyword	Hints for Searching by Keyword
	Keyword: (3) Search within Report Series	 Sasiroh sy Keyword is not obse sanskilje, navidalar, 5 will not
	Ri searce within report penes	perform demonstry functions,
	Browse by Record Series	Ecolean, or "fuzzy" searching (i.e., ersty must be eract wording).
		· The layword being searched may
		Expess Brywhere in the Instruction
	Duston	Search within Record Series is
	Evolution of Olexaction Instructions	checked, the Series title and Series description will also be easimpted. It
	Submit Search Reset Form	will not be highlighted.
		 Enter one keyword instead of a phrase, and then use the Search
		wähin Results cotion to reclupe the humber of hits.
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		phrase with substation marks (* *). • The assists engine will not property
		EBBION PROBABILITY AND ALL PROPERTY
		"Toke words" (and, or, not, as, etc.)

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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ME SEARCH HEL	Р					
ARCH > SEARCH ACRS > SE	ARCH RES	IULT				
Search ACRS		SEARCH F	RESULTS suids of your seators, and additional keywords to be used within the seators, or return to the			
Crosswalk			Return to Search Criteria			
List/ Export	Keyword easish within results: Enter keyword ordanta to search within the search results					
	Series	Sub-series	Record Title	Disposition	Date Added	
	Series Logistics		Record Title General Logistics Equipment Bilabiles and Property accountability	Disposition 0-6	Date Added 4:14:2011 4 44 15 PM	
		700A				
	Logistics	700A 700A	General Logistics. Equipment Busilies and Property accountability	0-6	414/2011 4 44 15 PM	
	Logistics	700A 700A 700A	General Logistics. Equipment: Supplies and Property accountability General Logistics. Etylayment: Supplies and Property accountability	0-6 6+	414/2011 4 44 15 PM 414/2011 4 44 15 PM	
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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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		2014-kijnilukyg		
			is-CH H(MUII)(g	
	Record Sub-series	Record Number	Retention Period	Status
	7005	7008	Q+-	Approved
Z	300C	300C	6+	Approved
	ACCE	9004	0-6	Approved
	900A	900A	Perm	Approved

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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	UisClassified Gogded In Act Tanada McCaughey, Unit: US Add-W31344 (Log C AS mattion Management System
	PLOAD ORLS & FOLDERS MANAGE MY ACCOUNT HELP ADMIN REPORTS
RLS & FOLDERS > OFFICE	RECORDS LIST > CREATE ORLS > CREATE FROM LIBRARY
Office Records List	RECORDS MANAGEMENT - CREATE ORL FROM LIBRARY
ORL Library	Create ORLs List ORLs Reorganize ORLs ORL Report
Proposed ORLs	Create from Scratch Create by Copying Create from Library
	Create a new ORL from Library allows users to add a group of preachines record ballgories to an ORL. Selecting one of the Library to the ORL individual record sub-series can be added or removed after the ORL is preaching one of the Library to the ORL individual record sub-series can be added or removed after the ORL is preaching one of the Library to the ORL individual record sub-series can be added or removed after the ORL is preaching or the ORL individual record sub-series can be added or removed after the ORL is preaching or the ORL for
	US AHS - W313AA
	Office Symbol: AAHS-CH
	12 1to 20 of 27
	SART Velomool Makterance Operations
	a a
	ACRS 51V 5-1 Lasie, passas promotion pasiats Atolie Duy science. Inout processing, enlicted retrement cases
	ACR3 Office Files Piles found in most offices: current employee manager files; job descriptions, TCY, military paraonnelifies, palifantime and attancence files, satificates, califantime, and attancence files, satificates, califantime, and attancence files, satisficates, california, and attancence files, satisficates, and attancence files, satisficat

Figure \mathcal{D} – 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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	S tion Management System	A. A				
OME SEARCH UPLO	OAD ORLS & FOLDERS MANAG	SE MY ACCOUNT HELP ADMIN REPORTS				
RLS & FOLDERS > FOLDERS	> CREATE FOLDERS	+ TAV ORETES				
		TH COMPTEM				
Office Records List	RECORDS MANAGEMENT - CREA	ITE FOLDERS				
ORL Library	Create Folders Delste Folders List Folders Vital Record Review					
Proposed ORLs		copy folders at one time. To preate folders, enter the folder names, one per line, into the Names field and				
Folders	the same year. They will all be in the same Special Collect A folder may be removed from the creation list by clicking D	lease before clicking the Submit button. Once all follows have been actied, olick Submit to create the follows				
	and to print labels for any hardboxy folders that were preate					
		then one folder, use the Multi-part checktox, and enter the total humber required in the Count field. Ab folger names if they will be used in the Share-Point Skatem ~ 14 % & + (<> ? () } Add(total)); the				
	name cannot begin or and with a dot and cannot contain co-					
		US AHS - W313AA				
	Office Symbol:	AAHS-CH				
	Office Records List:					
	Record Series:	(*)				
	Sub-series:					
	Duration:					
		Use RRSA				
	Event Driven:					
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		*				
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	Calendar Year or Fiscal Year?	🚸 Calendar Year				
		🗇 Fiscal Year				
	Indexing for a Special	🔿 Yes 💩 No				
	Collection: Special Collection:					
	apeciai Conection.	(7)				
	Freeze Code:	⊙ Yes è No				
	No freez	a codes have been assigned to the above folder.				
		Add Folders				
	You	u neusi achi foxiana bafore yau aubanit for creation.				
		Submit				

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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 \rightarrow 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.

		UnClassified Logged In As. Tamara McCaughey, Unit: US AHS-W313AA Log Out							
	A share and the state	gement System					E.	~	
IOME SEARCH	UPLOAD	ORLs & FOLDERS	MANAGE	NEY ACC	OUNT	HELP AD	MIN REPO	DRTS	
RLS & FOLDERS > FOLD	<u>ers</u> > <u>list f</u> i	OLDERS					+ 78.93	242725	
Office Records List	RECO	RDS MANAGEMEN	T - LIST FOL	DERS					
ORL Library	Create Folders Delete Folders List Folders Vital Record Review								
-			CTOR I GIO						
Proposed ORLs	request a click the f	en allows you to request acces coses to restricted folders, sek Request Records button. To c x beside the folder title and cliq	s to restricted folder act the View All opti- reate and print baro	s, print bare on, click the ode labels f	e check boxe	s beside the folder	title you need acci	ess to and	
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Figure 14 – List Folders 22

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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.

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