



FORMS COORDINATOR TRAINING
for the
Records Management System

October 2023

NORTH
Dakota
Be Legendary.

Information Technology

Records Management System

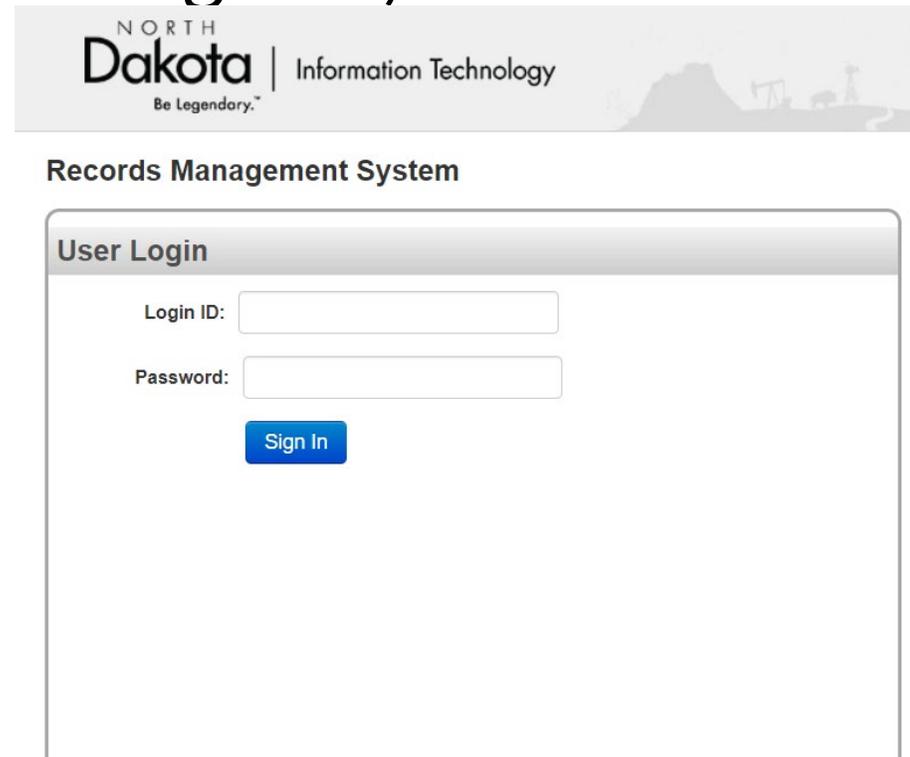
Records Management System (RMS) related to forms:

- State Forms:
 - Search for State Form Numbers (SFNs) assigned to agency forms
- Forms Inventory:
 - Review/certify the list of SFNs annually
 - System generates new reports each July, reporting due Dec 31st
 - If changes required, submit a ServiceNow request

RMS Log In

Link: <https://apps.nd.gov/itd/recmgmt/rm/user/login>

- Use state nd.gov (active directory) account credentials (user id, not email, as Login ID)



The screenshot shows the login interface for the Records Management System. At the top, there is a header for "NORTH Dakota | Information Technology" with the slogan "Be Legendary." and a background image of an oil pumpjack. Below the header, the text "Records Management System" is displayed. The main login area is titled "User Login" and contains two input fields: "Login ID:" and "Password:". A blue "Sign In" button is positioned below the password field.

Home Screen

Record Series Requests Submit Request

Nothing found to display.

[Record Series](#) [State Forms](#) [Forms Inventory](#)

Search Record Series

RCN:

Title:

Description:

Department:

Division:

Date Range: to

Media Type: Paper Electronic Other

Additional Filters

Include Inactive Records

Include ND General Records

Include Disposed Records

Search Record Series

State Forms

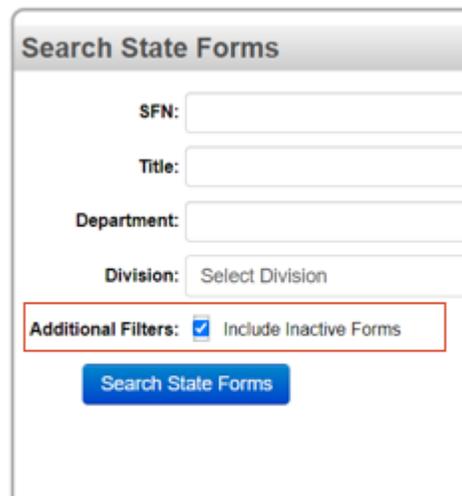
Information for state forms is accessible from two areas:

The screenshot displays the North Dakota Information Technology system interface. At the top, the logo for North Dakota Information Technology is on the left, and the user status 'Welcome RM User' with 'Log Out' and 'Working As: Clear Change' buttons is on the right. Below the header is a navigation menu with 'Home', 'Record Series', 'State Forms', 'Department', and 'Forms Inventory'. Two red arrows originate from the text above: one points to the 'State Forms' menu item, and the other points to the 'State Forms' tab in the right-hand panel. The left-hand panel, titled 'Record Series Requests', contains a 'Submit Request' button and the text 'Nothing found to display.'. The right-hand panel has tabs for 'Record Series', 'State Forms', and 'Forms Inventory'. The 'State Forms' tab is active and contains a search form with fields for 'SFN:', 'Title:', 'Department:', and 'Division: Select Division'. There is also an 'Additional Filters' section with an unchecked checkbox for 'Include Inactive Forms' and a 'Search State Forms' button.

Search State Forms

- Search by State Form Number (SFN), Title (keywords), or by Department/Division to return form details assigned to agency SFN(s).
 - Note: Department field searches - either start typing the name, agency number, or scroll through the drop-down list
- Form numbers are not deleted from RMS, but instead made inactive. Select “Include Inactive Forms” to include these SFNs in the search results.

State Forms



The screenshot shows a web interface for searching state forms. It features a search box with the title "Search State Forms" and four input fields: "SFN:", "Title:", "Department:", and "Division:". The "Division:" field is a dropdown menu with the text "Select Division". Below the input fields is a section for "Additional Filters" with a checkbox labeled "Include Inactive Forms" which is checked. At the bottom of the search box is a blue button labeled "Search State Forms".

State Forms - Search Results

- Search Results are initially sorted by SFN:



Export Table Data
13 items found, displaying all items.

Form Number	Title	Department	Division	Type	Active
2000	NEW MICROFILM FEASIBILITY STUDY	Information Technology Dept	Records Management		Yes
2041	RECORDS INVENTORY	Information Technology Dept	Records Management	Internal	Yes
2042	RECORD SERIES DESCRIPTION	Information Technology Dept	Records Management	Internal	Yes
2043	RECORDS RETENTION SCHEDULE	Information Technology Dept	Records Management		Yes
2044	RECORDS DISPOSAL REQUEST	Information Technology Dept	Records Management	Internal	Yes
2045	RECORDS DISPOSAL AUTHORIZATION	Information Technology Dept	Records Management		Yes
2453	RECORDS RETENTION/DISPOSAL LABEL	Information Technology Dept	Records Management		Yes

- Includes ability to export results to Excel (use Export Table Data-see arrow above)
- “Type” column – used if posted to state eforms website:
<https://www.nd.gov/eforms>
- Active – only active forms display, unless box checked to include inactive forms.

State Forms - Details

- Click anywhere on row to see details associated with forms

Form Number	Title	Department	Division	Type	Active
2000	NEW MICROFILM FEASIBILITY STUDY	Information Technology Dept	Records Management		Yes
2041	RECORDS INVENTORY	Information Technology Dept	Records Management	Internal	Yes

- This is an example of a form posted “internally” on the state eforms website:

2041 - RECORDS INVENTORY

Information Technology Dept - Records Management (1120-004)

Permissions

Internal: Yes

Public: No

Visible on Web: Yes

Form File: [02041.pdf](#)

Comments

Forms Inventory

Access Forms Inventory:

- Option 1 - If logged in to RMS, click the link in the email notification to be directed to Forms Inventory Review
- Option 2 - Department option from top menu
 - List of divisions is displayed
 - Click link under the Forms Inventory column for the appropriate division **Department**

Department	Division	Record Series	State Forms	Disposal	Disposal Month	Forms Inventory
Information Technology Dept (1120)		21	13		August	
Information Technology Dept (1120)	Records Management (004)	21	13	In-Process (0-90)	August	Incomplete

Forms Inventory

- Option 3 - Forms Inventory tabs, enter search criteria to locate the appropriate list
 - Reports are generated each July (i.e. if using “Date Range” to narrow search)

Forms Inventory Reports

Search Forms Inventory Reports

Report Number:

Department:

Division:

Date Range: to

Status: Complete In Progress Both

Forms Inventory Report

- List of state form numbers and titles is displayed
- Click the appropriate option* (bottom) to certify the report has been reviewed

*Notes:

1. If corrections required (option 2), a request is not automatically initiated for updates (see next slide)
2. Department tab status:
 - Option 1 will display as “Updates Required”
 - Option 2 will display as “Complete”
3. Once updates made, changes are reflected on the list.
 - SFNs made inactive will automatically be removed from the list.

Forms Inventory Review - 2023040

Information Technology Dept - Records Management (1120-004)

Inventory Status: In Progress
Inventory Year: 2023
Total Forms: 10

Forms Inventory

Form Number	Title	Department	Division
2000	MICROFILM FEASIBILITY STUDY	Information Technology Dept	Records Management
2041	RECORDS INVENTORY	Information Technology Dept	Records Management
2042	RECORD SERIES DESCRIPTION	Information Technology Dept	Records Management
2044	RECORDS DISPOSAL REQUEST	Information Technology Dept	Records Management
2045	RECORDS DISPOSAL AUTHORIZATION	Information Technology Dept	Records Management
2453	RECORDS RETENTION/DISPOSAL LABEL	Information Technology Dept	Records Management
51758	RECORDS MANAGEMENT REVIEW WORKSHEET	Information Technology Dept	Records Management
59608	RECORDS MANAGEMENT PROGRAM ASSESSMENT	Information Technology Dept	Records Management
61121	RESPONSE TO OPEN RECORDS REQUEST	Information Technology Dept	Records Management
62318	FORM DOWNLOAD INSTRUCTIONS	Information Technology Dept	Records Management

Forms Inventory Certification

I certify that the State Forms Have Been Reviewed and Are Correct.

I certify that the State Forms Have Been Reviewed and Requires Corrections. A request Will Be Submitted to update the State Form Inventory.

Forms Inventory – Requires Corrections

If the forms inventory requires corrections (SFN deletions, transfers to a new division, new SFNs needed - not on list, etc.):

- Submit a “State Forms” request on the ServiceNow portal:
<https://northdakota.service-now.com/serviceportal>
 - Instructions on NDIT RM website:
<https://www.ndit.nd.gov/it-services/statewide-shared-platforms/records-management>
- Once updates complete, log in to RMS to change the Forms Inventory certification to reflect the list as correct
- The status under the Department tab, Forms Inventory column will change from ‘Updates Required’ to ‘Complete’

Contact Information

Dawn Cote	dcote@nd.gov	701-328-3592
Sharon Freeman	sfreeman@nd.gov	701-328-3579
Aimee Bader	aimee.bader@nd.gov	701-795-3051
Service Desk	ndit.nd.gov/support	701-328-4470 or 877-328-4470