

Records Management System

Forms Coordinator Training

August 2016



NORTH DAKOTA
INFORMATION
TECHNOLOGY
DEPARTMENT

Records Management System

New Records Management System replaces:

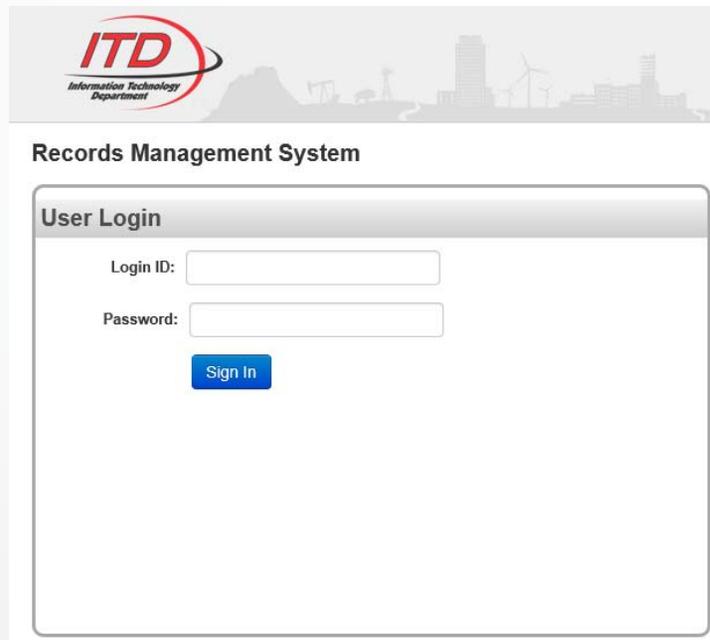
- SFN 51333 Forms Design Request/Approval
- Forms Inventory Report



Log In

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

- Use NDGov account credentials



The screenshot shows the login interface for the ITD Records Management System. At the top left is the ITD logo (Information Technology Department) with a stylized red and black graphic. To the right is a grey silhouette of a city skyline. Below the logo and skyline, the text "Records Management System" is displayed. The main content area is a white box with a grey header titled "User Login". Inside this box, there are two input fields: "Login ID:" followed by a text box, and "Password:" followed by a text box. Below the password field is a blue button with the text "Sign In".

Home Screen



Welcome RM User

Log Out

Working As: [Clear](#) [Change](#)

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

Record Series Requests

Nothing found to display.

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

Search Record Series

RCN:

Title:

Department:

Division:

Date Range: to

Media Type: Paper Electronic Other

Additional Filters

- Include Inactive Records
- Include ND General Records
- Include Disposed Records

State Forms

Information for state forms is accessible from two areas:

The screenshot displays the ITD Information Technology Department website interface. At the top left is the ITD logo. The top right shows the user is logged in as 'RM User' with 'Log Out' and 'Working As: Clear Change' buttons. A navigation menu includes 'Home', 'Record Series', 'State Forms', 'Department', and 'Forms Inventory'. Two red arrows point from the text above to the 'State Forms' menu item and the 'State Forms' sub-tab. The 'Record Series Requests' panel on the left shows 'Nothing found to display.' The 'State Forms' panel on the right contains a search form with fields for 'SFN', 'Title', 'Department', and 'Division' (a dropdown menu), an 'Additional Filters' section with an 'Include Inactive Forms' checkbox, and a 'Search State Forms' button.

Search State Forms

- Search by Department or Department and specific Division to display a list of all forms

[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 |

- Department field - either start typing the name or scroll through the drop-down list
- Ability to export data to Excel
- Type - Internal/Public on eforms website
- Click on a specific form to see detailed information

Search State Forms

- Search by State Form Number (SFN) to return specific form information
- Search by all or part of a Title to display forms with a similar word in the title
- Form numbers are not deleted - Inactive can be included in the search results

2041 - RECORDS INVENTORY

Information Technology Dept - Records Management (1120-004)

| <u>Permissions</u> | <u>Comments</u> |
|--------------------------------------|-----------------|
| Internal: Yes | |
| Public: No | |
| Visible on Web: Yes | |
| Form File: 02041.pdf | |

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

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 to certify the report has been reviewed

Forms Inventory Review - 2016013

Information Technology Dept - Records Management (1120-004)

Inventory Status: In Progress
Inventory Year: 2016
Total Forms: 13

Forms Inventory

| Form Number | Title | Department | Division | Size |
|-------------|-------------------------------------|-----------------------------|--------------------|--------|
| 2000 | NEW MICROFILM FEASIBILITY STUDY | Information Technology Dept | Records Management | |
| 2041 | RECORDS INVENTORY | Information Technology Dept | Records Management | 21 kb |
| 2042 | RECORD SERIES DESCRIPTION | Information Technology Dept | Records Management | 638 kb |
| 2043 | RECORDS RETENTION SCHEDULE | Information Technology Dept | Records Management | |
| 2044 | RECORDS DISPOSAL REQUEST | Information Technology Dept | Records Management | 694 kb |
| 2045 | RECORDS DISPOSAL AUTHORIZATION | Information Technology Dept | Records Management | |
| 2453 | RECORDS RETENTION/DISPOSAL LABEL | Information Technology Dept | Records Management | |
| 7694 | CERTIFICATION OF RECORDS DISPOSAL | Information Technology Dept | Records Management | |
| 17705 | ROUTING SLIP | Information Technology Dept | Records Management | |
| 51333 | FORM DESIGN REQUEST/APPROVAL | Information Technology Dept | Records Management | 219 kb |
| 51624 | TRAINING EVALUATION | Information Technology Dept | Records Management | |
| 51758 | RECORDS MANAGEMENT REVIEW WORKSHEET | Information Technology Dept | Records Management | |
| 59608 | RECORDS MANAGEMENT PROGRAM REVIEW | 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 submission to request an update for these forms Will Be Submitted to update the State Form Inventory.

Forms Inventory – Requires Corrections

If the forms inventory required corrections:

- Submit a Form Number service request in WMS to request the change
- Once notification is received that the change is complete, log in to RMS to update the Forms Inventory Certification
- Locate the appropriate Forms Inventory and click the option that it has been reviewed and is correct
- The status under the Forms Inventory column under the Department tab will change from 'Updates Required' to 'Complete'

Work Management System

- Submit requests for work from ITD
 - <https://apps.nd.gov/itd/workorder/login.htm>
 - Opens to My Work Queue screen

North Dakota nd.gov Official Portal for North Dakota State Government

WMS WORK MANAGEMENT SYSTEM

[Main Menu](#) | [My Work Queue](#)

Work Queue: Becky L. Lingle

[WO](#) | [WOGH](#) | [Process Req](#)

My Work Orders

Sort by clicking on column headers. Multiple clicking will sort alternately in ascending and descending order.

| Div - Desc | Work Order - Desc | End User | Request Manager | Status | Need By Date | Action |
|-------------------------|--|----------|-----------------|--------|--------------|---|
| 35 - Records Management | 151738 - Support for EDMS Projects | | Becky L. Lingle | Open | 12/31/2010 | Serv Req Edit Close |
| 35 - Records Management | 166764 - Record Series SR | | Becky L. Lingle | Open | 12/30/2015 | Serv Req Edit Close |

My Work Orders - General Header

Sort by clicking on column headers. Multiple clicking will sort alternately in ascending and descending order.

| Div - Desc | Work Order - Desc | End User | Request Manager | Status | Need By Date | Action |
|-------------------------|---|----------|-----------------|--------|--------------|---|
| 35 - Records Management | 166849 - GH 2016 ITD - RM | | Becky L. Lingle | Open | 12/31/2016 | Serv Req Edit Close |

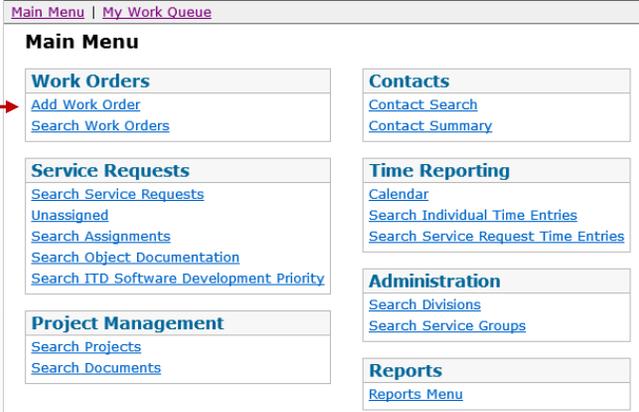
Process Service Requests

Sort by clicking on column headers. Multiple clicking will sort alternately in ascending and descending order.

| Type | Dept | Div | Work Order No | Serv Req No - Desc | Priority | Status | Dev Status | Required Date | Est Comp Date | Action |
|-------------|--------------|-----|------------------------|--|----------|-----------|------------|---------------|---------------|--------|
| Form Design | 0540 - NDACo | | 166770 | 1306212 - Form Design SR | | Assigned | | 07/24/2015 | 12/30/2017 | |
| Form Design | 3250 - DHS | 10 | 166950 | 1307105 - SFN 1947 Changes | | Assigned* | | 09/01/2016 | 10/03/2016 | |
| Form Design | 8011 - MV | 10 | 166902 | 1306572 - Form Design SR | | Assigned | | 03/22/2017 | 03/22/2017 | |
| Form Number | 8010 - DOT | 30 | 166672 | 1305767 - Form Number SR - Del | | Assigned | | 06/27/2016 | 09/02/2016 | |

Work Management System

- Involves two steps:
 - Work Order
 - Service Request
- Add Work Order under Main Menu 
- One Work Order can be set up for each year
 - Short Description: 20XX Forms
 - Need By Date: 12/31/20XX
- Charge Code - check with your Accounting area



Main Menu | My Work Queue

Main Menu

Work Orders
[Add Work Order](#)
[Search Work Orders](#)

Service Requests
[Search Service Requests](#)
[Unassigned](#)
[Search Assignments](#)
[Search Object Documentation](#)
[Search ITD Software Development Priority](#)

Project Management
[Search Projects](#)
[Search Documents](#)

Contacts
[Contact Search](#)
[Contact Summary](#)

Time Reporting
[Calendar](#)
[Search Individual Time Entries](#)
[Search Service Request Time Entries](#)

Administration
[Search Divisions](#)
[Search Service Groups](#)

Reports
[Reports Menu](#)

New State Form

- Select appropriate Work Order
- Click Service Request button
- Click Add Service Request button
- Forms coordinators have been set up to access appropriate service request types under Records Management
 - Form Number if the form was drafted or designed by your department and just needs a State Form Number
 - Forms Design if ITD will design the new form and assign a State Form Number

New State Form

- Attach a copy of the form if the form was drafted or designed by your department
- Information Analyst will review the form and assign a State Form Number
- The new State Form Number will be returned through WMS

Update State Form

- Requested through ITD's Work Management System
<https://apps.nd.gov/itd/workorder/login.htm>
 - Forms Design – request changes to the actual design of the form if designed by ITD
 - Attach a copy of the form with changes indicated
 - Form Number – request updates to form title or division

Delete State Form

- Requested through ITD's Work Management System
<https://apps.nd.gov/itd/workorder/login.htm>
 - Form Number service request
 - Include reason the forms is being deleted in Comments/
Special Instructions field



Contact Information

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Service Desk

701-328-4470 or 877-328-4470

<https://www.nd.gov/itd/onlineincident/createincident.aspx>

THANK YOU

Visit us at [*www.ND.gov/ITD*](http://www.ND.gov/ITD)