Records Management System

Forms Coordinator Training

August 2016

NORTH DAKOTA INFORMATION TECHNOLOGY DEPARTMENT

Records Management System

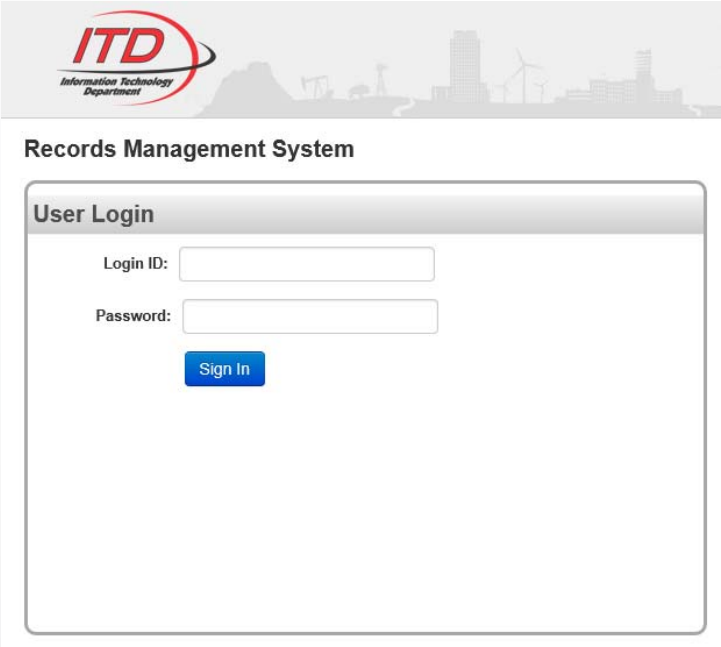
New Records Management System replaces:

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

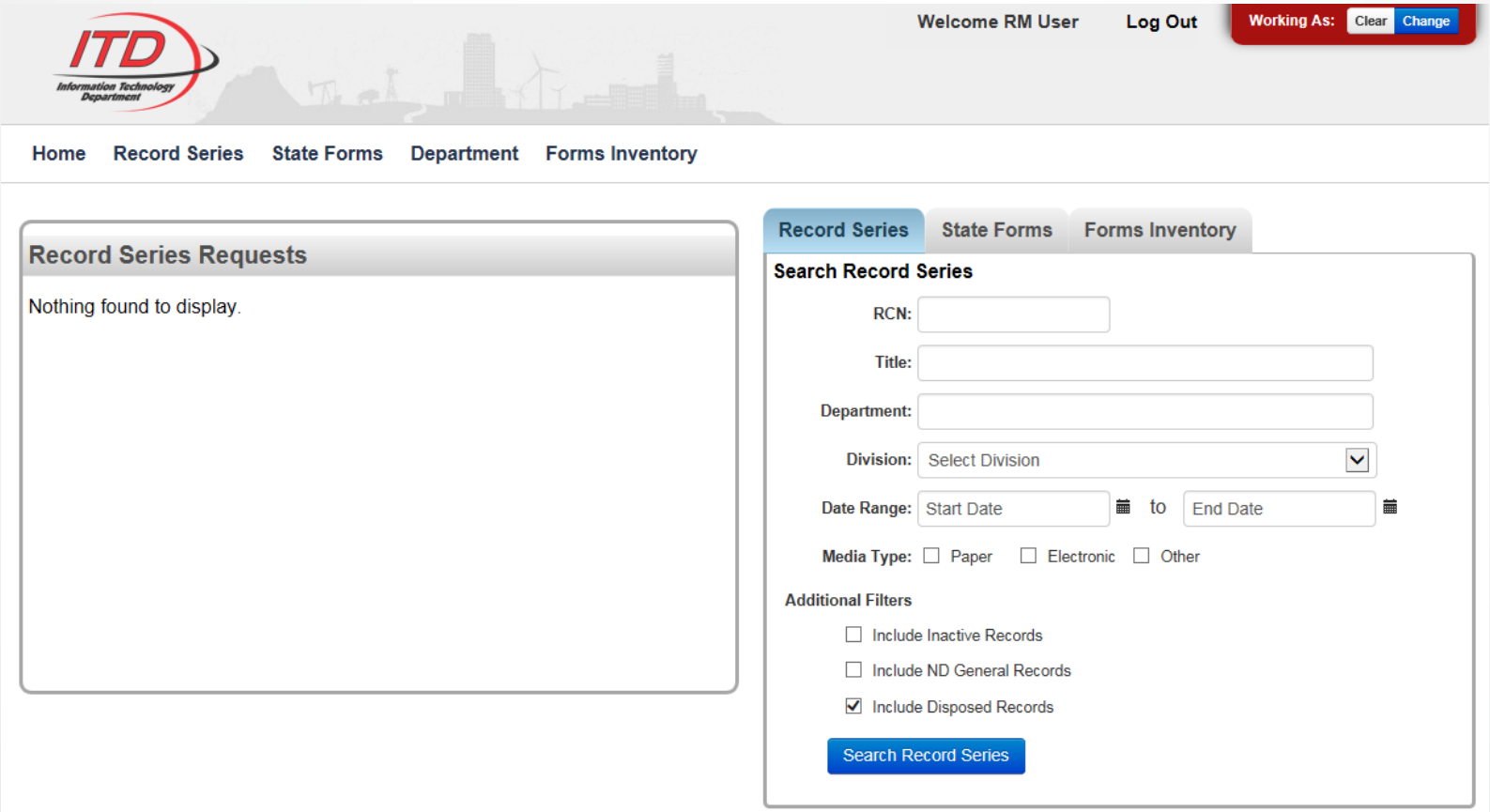
Log In

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

- Use NDGov account credentials

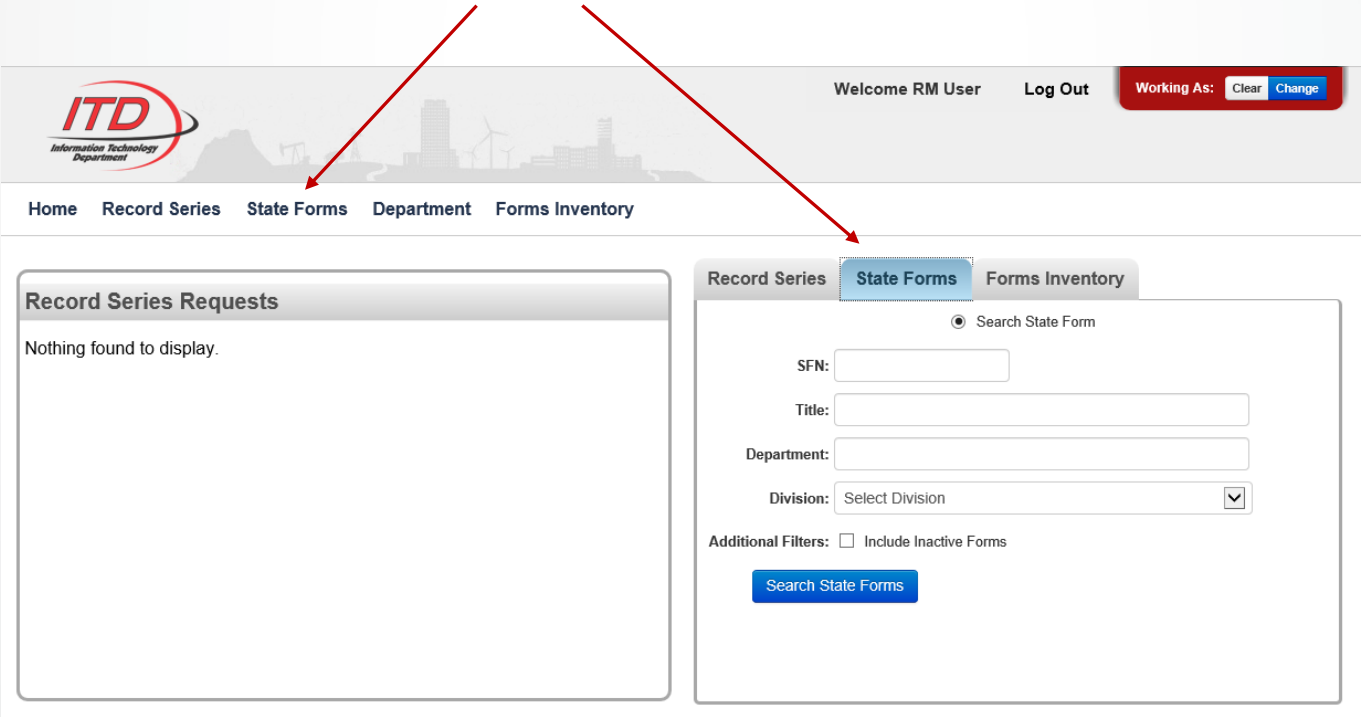


Home Screen


ITD
Information Technology Department
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:
Select Division
Date Range:
Start Date
to
End Date
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:



Search State Forms

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

Export Table Data

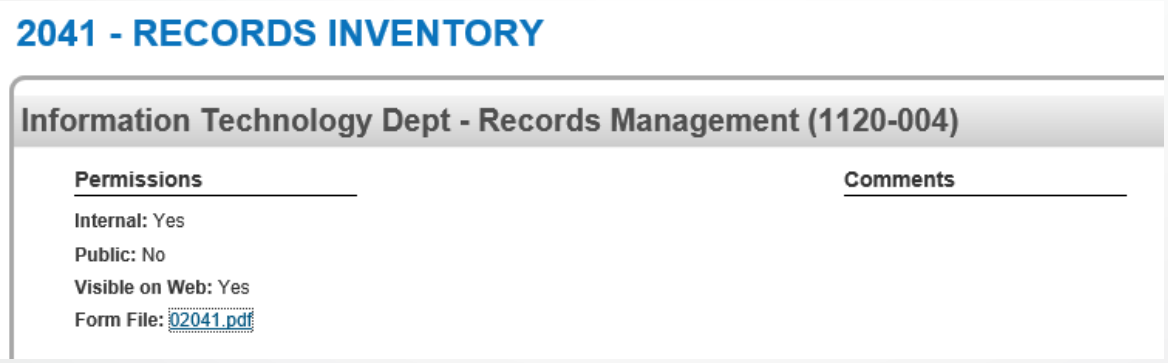
13 items found, displaying all items.

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



Forms Inventory

Access Forms Inventory:

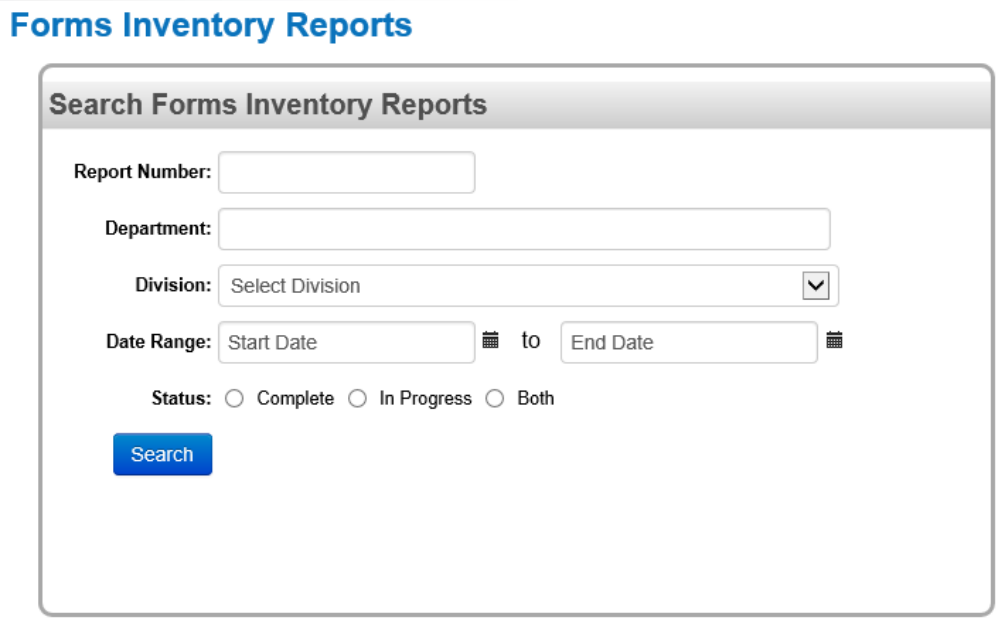
- Option 1 - If logged in to RMS, click the link in the email notification to be directed to Forms Inventory Review
- Option 2 - Department option from top menu
  - List of divisions is displayed
  - Click link under the Forms Inventory column for the appropriate division

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 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

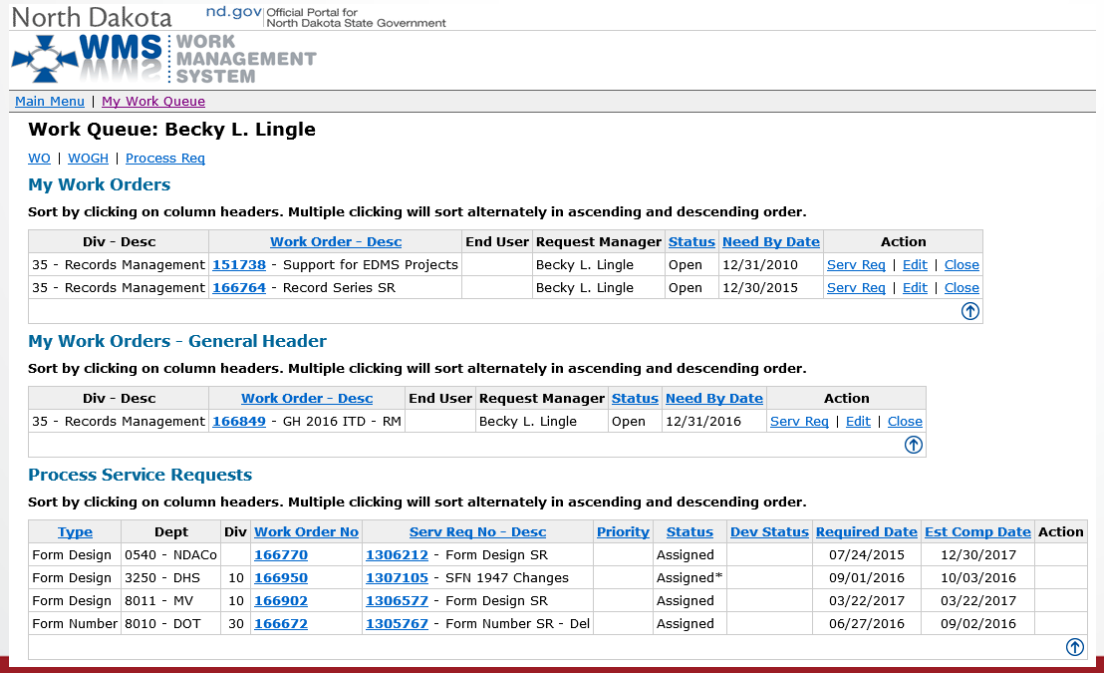
○ I Certify that the State Forms **Have Been Reviewed** and **Are Correct.**

○ 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.

Back Submit

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

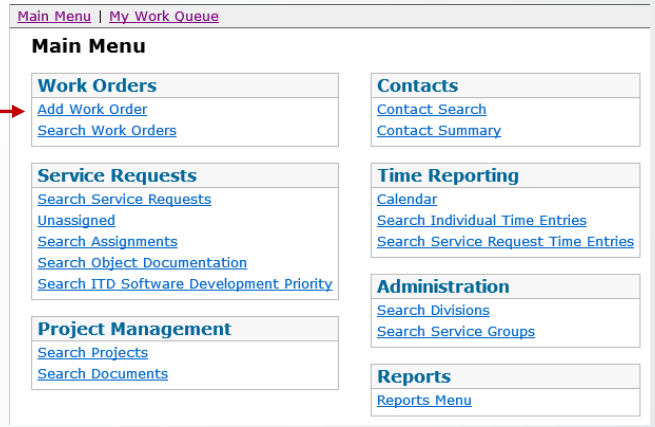
Process Service Requests

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	1306577 - 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

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***