

THE ARMY RECORDS INFORMATION MANAGEMENT SYSTEMS
(ARIMS)



PRESENTED

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Lesson Activity # 1 - Army Consolidated Records Schedule – (ACRS)

On the HOME PAGE

1. Click on **SEARCH and the Search ACRS screen appears.**

a. Click on Dropdown Menu by **Record Series – “600”**

Click on Dropdown Menu **Sub-Series – “600A”**

Click on Duration – **0-6**

Submit Search

Click on **Records Title**

Disposition Details Screen Appears

Click on Close

Click Return to Search

b. Click on Dropdown Menu by **Record Series – “800”**

Click on Dropdown Menu **Sub-Series – “800D”**

Submit Search

Click on **Records Title for each Disposition**

Click on **Close after each Disposition Detail**

Click Return to Search

2. Click on **Search Cross-Walk**

Click on **Quick Reference Cross-Walk** – The record series populate.

Click on the “800” series

Click on the 800B subseries

Click on 15-6b1 subseries under 0-6 years. The Record Detail Instructions appear.

Click on Close

Click on 15-6b2 subseries under PERM. The Record Detail Instructions appear. (NOTE: PERM records MUST be transferred to the Records Holding Area or Uploaded into the Army Electronic Archives)

Click on Close

3. Click on “**Detailed Reference Cross-Walk**” NOTE: YOU MUST ALWAYS GO BACK TO DETAILED REFERENCE CROSS-WALK EACH TIME YOU CHANGE THE WAY YOU SEARCH:

Click on “**Old Record Number**” and type record number “**1aa4**”.

Click on “**Get Cross-Walk**” tab and the new Number, Title, Retention Period/Disposition and Record Description display.

Click on the “**View Instructions**” and the information that displayed on the old ORL is displayed.

Go back to “**Quick Ref Cross-Walk**” and back to “**Detailed**”

Click on “**Prescribing Directive**” and put publication number “**25-400-2**”.

Click on “**Get Cross-Walk**” tab for the Record number, Record title, description and retention data.

Go back to “**Quick Ref Cross-Walk**” and back to “**Detailed**”

Click on “**Record Series**” to look up by Record Series.

Insert Record Series “**700**”, Sub-Series “**700A**”, Duration “**0-6**”

Click on “**Get Cross-Walk**” tab for the Record number, Record title, description and retention data.

4. Click on “**List/Export**”

“**Export Records Category List**”

Click on “**Records Category**” - **600** and click “**Submit**” and Open

Lesson Activity 2 – Building Office Record List (ORL)

Click on **ORLS AND FOLDERS**

The three ways to create an ORL are as follows:

1. Create an ORL from scratch:

- Click on Create **Office Records List (ORL)**
- Select Create from Scratch
- Select the correct **Office Symbol**
- **Name the ORL** (Be specific to your unit, i.e., S-1, 199th, Records Section, MPA).
- Select **Correct Year**
- Click the “**Create ORL**” button. If you already have an ORL for your office symbol in ARIMS, do NOT click Submit.
- After creating an ORL, you may begin adding records from the ACRS to your ORL.

2. Create an ORL by copy: – Copy an existing ORL from the drop down menu, enter new name and select year.

- Click on **Office Records List (ORL)**

- Select **Create an ORL**
- Select **Create by copying** from the drop-down menu
- Ensure the office symbol reflected is your correct office symbol
- Choose the ORL from the **“ORL from which to copy”** drop down menu
- Type the **Name for the new ORL and select the applicable year** – Name the ORL a name that is unique to your organization.
- Click on the **Copy Folders box** to copy last year’s folders to this year.
- Click the **“Create ORL”** button. If successful, a message will appear that reads, “ORL created”.

If you need to add records to your copied ORL, you may do so. **The ORL will change from “Approved” to “Draft”**

3. Create an ORL by Library: – Is suppose to allow user to create an ORL using a pre-built library of ORL’s consisting of records created by Records Officials and based on the type of unit for which the records will be maintained.

Lesson Activity 3 – Editing (Updating) Records on ORL

1. List and update Office Records List (ORL):

- Click **ORLs & Folders, Office Records List, List ORLs**
- Select your **Unit and office symbol, click the submit button**. (A list of ORLs will be displayed.)
- Click the **Title/Name of the ORL** you want to update. (The ORL will highlight)
- Click **“Edit”** button. (“Records Management – ORL Details”) screen appears

- Click “**Add Records Instructions**” button at bottom of the page.
- The Army Consolidated Records Schedule (ACRS) Basic Search screen appears. Use the Army Consolidated Records Schedule (ACRS) to search for records to populate your ORL.

2. Add Records to Office Records List (ORL):

- a. Click on Dropdown Menu **Record Series – “800”**

Click on Dropdown Menu **Sub-Series – “800D”**

Duration - 0-6

Click – **Submit Search**

Click **Record Title** to view Disposition Details

Click Close

- To add file numbers to your ORL, click on the box to the left of the “Record Series” and hit the “Submit” button at the bottom of the page.

Click Return to Search

- b. Click on Dropdown Menu **Record Series – “1000”**

Click on Dropdown Menu Sub-Series – **“1000B”**

Click – Submit

Click Record Title for each disposition

Click Close after each disposition

- To add file numbers to your ORL, click on the box to the left of the “Record Series” and hit the “Submit” button at the bottom of the page

Click Return to Update Page

c. Click on Dropdown Menu Record Series – “700”

Click on Dropdown Menu Sub-Series – “700A”

Duration - 0-6

Click – Submit

Click Record Title to view Disposition Details

Click Close

- To add file numbers to your ORL, click on the box to the left of the “Record Series” and hit the “Submit” button at the bottom of the page

Click **Return to Update Page**

- Click “Close” button at bottom of page.

- The “Records Management - List of ORLs” page will appear.

- **Click on the ORL name** you updated from the ORL list to select.

- Click the “**View/Print**” button at the bottom of the page. (The “Records Management - ORL Details” screen appears)

- Check the ORL to ensure the new files are listed. The status column will reflect “Proposed” for new files added.

- Click “Close” button at bottom of page.

- **When you have completed updating/adding records to your ORL, click the “Submit As Proposed” button at the bottom of the “Records Management - List of ORLs” page. This will submit your ORL to the Records Manager for approval. DO NOT DO THIS IN CLASS. Only submit the ORL when ready for approval.**

- The status column of your ORL changes from “**DRAFT**” to “**PROPOSED**” after the ORL is submitted for review/approval by the Records Coordinator and then to “**APPROVED**” when it has been approved by the Records Manager.

Lesson Activity 4 – Renaming and Printing ORLS

1. Rename ORL:

- Click **ORL & Folders, Office Records List, List ORLS**
- Select your unit and office symbol, click the submit button. (A list of ORLS will be displayed.)
- Click the **Title/name of the ORL you want to rename.** (The ORL will highlight)
- Click on the “**Rename**” button. (“Records Management - Rename ORL” screen appears)
- Type the new name for the ORL in the “**New Office Records List Name**”
– Be specific to your unit when naming ORL’s.
- Click on the “**Submit**” button. (A message box will appear to show the renaming was successful. Click the “OK” button to dismiss the message.)
- You will be returned to the **list of ORLS** screen. The new name appears in the ORL.

2. List and View ORLS:

- Click **ORL & Folders, Office Records List, List ORLS**
- Select your unit and office symbol, click the submit button. (A list of ORLS will be displayed.)
- Click on the **ORL name.** (The ORL will highlight)
- Click the “**View/Print**” button at the bottom of the screen. (“**Records Management ORL Details**” screen will be displayed)

- Click the “**Print Summary**” button at the end of the page to bring up the “Records Management – ORL Summary” screen.

- Click Print to print your ORL. Click Close.

- Click “**Print Details**” to a detailed view of all the records on your ORL.

Lesson Activity # 5 – Making Hardcopy Folders

- Click **ORLs & Folders, Folders, Create Folders.**

- “Records Management – Create Folders” screen appears.

- Ensure your **correct office symbol is reflected.**

- Choose the **Office Records List containing** the files that need folders.

Example 1:

- Choose the “**Records Series**” – **800**

- Choose the “**Sub-Series**” – **800D**

-

- Choose the “**Duration**” – **0-6**

- Click on the “**Use RRS-A**” box

- Click under the word “**Select**” beside **1a Office Record List**. The **retention period** will automatically populate.

- **Event Driven** will automatically **populate if applicable.**

- Event Description will automatically populate if applicable.

- Type in **Names of Folders** – “**ORL**”

- Click on **Hard Copy**

Vital Record will populate if the record is a vital record. - Click “Vital Record.” The definition of vital record as found in AR 25-403, is “*Vital records are records that contain information the Army may need to conduct business under emergency operating conditions or to protect the legal and financial rights of the Federal Government and the people it serves.*”

Click Multi-part if more than one folder is needed - If you need to make multiple copies of the label, click the box next to multi-part and count and input the number of labels in the “Count” box.

Click Special Collection, if applicable - Only click “Yes” for “special collection” if it applies to your organization. Otherwise, click “No.” Special collection records are records that pertain to the Gulf War, Operation Enduring Freedom, etc.

- Privacy Act will populate if the record is applicable to the Privacy Act
- Calendar Year or Fiscal Year will populate accordingly
- Click the “**Add Folders**” button at the **bottom of the page**.

Example 2:

- Choose the “**Records Series**” – **700**
- Choose the “**Sub-Series**” – **700A**
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- Choose the “**Duration**” – **0-6**
- Click on the “**Use RRS-A**” box
- Click under the word “**Select**” beside **710-2c – Hand Receipts**. The **retention period** will automatically **populate**.
- **Event Driven** will automatically **populate if applicable**.
- Event Description will automatically populate if applicable.

- Type in **Names of Folders** – “**Hand Receipts**”
- Click on **Hard Copy**
- The record will appear at the bottom of the page.
- **Continue to add folders** using the Records Instruction titles until all the files have folders made for them.
- The **folders will all populate** at the bottom of your screen.
- Click the “**Submit**” **button at the bottom** of the screen to create the folders and print the labels for the hardcopy folders.

Lesson Activity # 6 – Print Labels From Folder Screen

- Avery 5161 Labels will print labels correctly
- Print Labels Screen appears.
- Click on Advanced Options
- Choose ACRS Instruction, Folder or both
- Click on Create
- Click on Open
- Click print icon
- Go to Page Scale – Click “None” OR Size Options “Fit”
- Click O.K.
- Labels will print out

Lesson Activity # 7 – Create AO Folders for File Labels for Sub-Folders

You can only create AO folders for hard copy files. You can add AO folders directly in Outlook under the ARIMS file # on your ORL.

- Click on **ORLs and Folders, Folders, List Folders**.
- The “Records Management – List Folders” screen appears.
- Use the ORL drop down list to select the appropriate ORL.
- Ensure “**Hardcopy**” is **checked**.

EXAMPLE 1:

- Click the **Title of the hardcopy folder – Office Records List** that will contain the AO folder. “Folder Details” screen appears.
- Click the “**Create AO Folder Button**” at top right of page to create the new AO folder. The “Records Management – Create AO Folder” screen appears.
- Type in the **AO folder name** – example – “**ORL**”. Name the folder whatever files will be filed within the file.
- Enter up to five keywords in any of the “Keyword” boxes if you choose. This is mainly for electronic files.
- On the drop down menu for “**Media Type**” – enter **Hardcopy**
- Click “**Submit**” button
- “AO Folder was successfully created” screen will appear.
- Click “O.K.”
- “Folder Details” screen will appear.
- New **AO folder** will be displayed at the **bottom** of page.

EXAMPLE 2:

- Click the **Title of the hardcopy folder – Hand Receipt** that will contain the AO folder. “Folder Details” screen appears.
- Click the “**Create AO Folder Button**” at top right of page to create the new AO folder. The “Records Management – Create AO Folder” screen appears.
- Type in the **AO folder name** – example – “**HAND RECEIPT**”. Name the folder whatever files will be filed within the file.
- Enter up to five keywords in any of the “Keyword” boxes if you choose. This is mainly for electronic files.
- On the drop down menu for “**Media Type**” – enter **Hardcopy**
- Click “**Submit**” button
- “AO Folder was successfully created” screen will appear.
- Click “O.K.”
- “Folder Details” screen will appear.
- New **AO folder** will be displayed at the **bottom** of page.
- Continue adding AO folders as are needed for each file.
- Click on “**Close Detail View**” button at top of the page.
- To print **AO Folders**, click the **box** next to the **folder name** and click the “**print label**” button.
- Follow steps in Lesson Activity # 6 – Print labels from folder screen.

Lesson Activity # 8 – Edit AO Folders for Sub-Folder File Labels

- Click on one of the folder titles.

- The “**Folder Details**” screen will appear.
- Click “**Edit AO Folders Detail**” button to the right of the folder name.
- Under “**AO Folder Name**” modify the name and/or any keywords.
- Click the “**Update**” button to the right of the page.
- The “**Folder Details**” screen is displayed reflecting your changes.
- Click the “**Close Detailed View**” button to return to the “Records Management - List Folders” screen.
- Check the **boxes next** to the file names to print and click **Print**

Lesson Activity # 9 – Creating Labels

Creating labels – there are two ways to create labels.

If you are just entering ARIMS follow these steps to get to the “Records Management List”.

- Click on “**ORLs and Folders**”
- Click on “**Folders**” and “**List Folders**”
- Choose the correct **ORL**.
- The “List Folders Screen” is displayed.
- Click the “**Hardcopy**” button.

If you are already working in ARIMS and at the “Records Management List” screen, you can begin here.

- Click the **check boxes** beside the **Folder Title(s)** that need labels.
- Print Labels Screen appears.

- Click on **Advanced Options**
- Choose **ACRS** Instruction, Folder or both
- Click on **Create**
- Click on **Open**
- Click **print**
- Go to **Page Scale** – Click “**None**”
- Click O.K.
- Labels will print out-

Lesson Activity # 10 – Making Electronic Folders

- Click **ORLs & Folders, Folders, Create Folders.**
- “**Records Management – Create Folders**” screen appears.
- Ensure your **correct office symbol** is reflected.
- Choose the Office Records List containing the files that need electronic folders. **YOU CAN MAKE ELECTRONIC FOLDERS FOR ANY FILES, BUT ONLY THOSE WITH 6+ YEAR DURATION CAN BE FILED IN THE ARMY ELECTRONIC ARCHIEVE IN ARIMS. OTHER FOLDERS CAN BE FILED IN YOUR E-MAIL FOLDERS FOR YOU TO DESTROY IN YOUR CENTAL FILES AREA.**

EXAMPLE 1:

- Choose the “**Records Series**” – **1100**
- Choose the “**Sub-Series**” – **1100B**
- Choose the “**Duration**” – **6+**

- Click on the “**Use RRS-A**” box
- Click under the word “**Select**” beside **37z Government Credit Card Certifying/Billing Officer's Accounts Files.** The retention period will automatically populate.
- **Event Driven** will automatically **populate if applicable.**
- Event Description will automatically populate if applicable.
- Type in **Names of Folders** – “**GPC Files**”
- Click on **Electronic Copy** - Click on **Add Folders**
- The record will appear at the bottom of the page.
- **Continue to add folders** using the Records Instruction titles until all the files have folders made for them.
- Do NOT hit submit until all folders are added.

EXAMPLE 2:

- Choose the “**Records Series**” – **800**
- Choose the “**Sub-Series**” – **800D**
- Choose the “**Duration**” – **0-6**
- Click on the “**Use RRS-A**” box
- Click under the word “**Select**” beside **1ii, Office military personnel files**
- **Event Driven** will automatically **populate if applicable.**
- Event Description will automatically populate if applicable.

- Type in **Names of Folders** – “**Military Personnel Files**”
- Click on **Electronic Copy**
- Click **Add Folders**
- The record will appear at the bottom of the page.
- **Continue to add folders** using the Records Instruction titles until all the files have folders made for them.
- Click Submit

Lesson Activity # 11 – Delete Folders

Folders may not be deleted if they have records indexed in the ARIMS AEA or at a RHA against them.

- Click on, ORLs & Folders, Folders and Delete Folders
- “Records Management - **Delete Folders**” screen appears.
- Select the **ORL** containing the **folder titles** needing to be **deleted**.
- Select the **box** next to the **Folder Title** of the **folders** to be **deleted**.
- Click “**Delete**” button at the bottom of the page. Then click “O.K.” in the pop up dialogue box.
- You will be returned to the “Records Management - Delete Folders” screen

Lesson Activity #12a – Electronic Filing – Uploading Documents to the Army Electronic Archive (AEA): YOU MUST HAVE ELECTRONIC FOLDERS TO FILE ELECTRONICALLY

Files with a disposition of 0 – 6 years may be electronically filed on your computer or CD. It is your responsibility to destroy them at the correct time IAW the ARIMS destruction disposition. - **ARIMS will only allow you to file documents with a retention period of 6+ years in the Army Electronic Archive.**

To load multiple records in the AEA from a folder, you must download the Bulk Archive Tool.

- Click on **“Upload”**
- Click on **Run the Bulk Archive Tool (File System)**
- Select your **Office Symbol** and **Office Records List** from the drop-down menu. Then your **ORL Folder hyperlink** will appear. ie.
c:\users\jane.doe\documents\Bulk Archive\W1FCR2-ATZK-LZ\2012 – Bde S1
- Click **Update Folders**
- Note: If the BAT has never been installed on your computer, it will automatically install it to the “My Documents” Folder.
- Make the **screen smaller** and **put to the side**, but do not close it.
- Open **My Documents**
- **Double Click on the Bulk Archive Folder**
- **Double Click on ORL Folder containing your UIC and Office Symbol**
- **Double click the 2012 or 2013 ORL Name**
- **Double click the Record Number folder – must be a 6+ or permanent file number, Example – “800D 6+” to be filed in the AEA**
- **Double click the Electronic Folder – move screen to side**
- **Open folder or file in your documents or CD that you want to electronically file. Copy or drag files from your desktop, CD or My Documents on computer to the Electronic Folder.**
- **Then click Update Folders from the Bulk Archive Tool**

- Click **Begin Upload**. Your ORL populates. The file you have just added should have a **Green** checkmark beside it.
- **Upload Complete** Appears
- Click Close

Lesson Activity #12b – Electronic Filing For (0-6 Year Files) – Uploading Documents to the Bulk Archive Tool (BAT): YOU MUST HAVE ELECTRONIC FOLDERS TO FILE ELECTRONICALLY

- Open **My Documents**
- **Double Click on the Bulk Archive Folder**
- **Double Click on ORL Folder containing your UIC and Office Symbol**
- Double click the **2012 or 2013 ORL Name**
- Double click the **Record Number** Example – “800D 0-6”
- Double click the **Electronic Folder** – move screen to side
- Open **folder or file** in your My Documents, Desktop or CD that you want to electronically file. **Copy or drag** files from your My Documents, Desktop or CD on computer to the **Electronic Folder**.

Lesson Activity #13 – Electronic E-Mail Filing

To download your Office Records List to Outlook, you must download the Bulk Archive Tool. This will enable you to file any file regardless of duration in your personal folders in Outlook. You must have created an electronic folder in order for this to work.

- Click on **“Upload”**
- Click on Run the **“Bulk Archive Tool (E-Mail System)”**

- Select your **Office Symbol and Office Records List** from the drop-down menu. Then your **ORL Folder** hyperlink will appear. ie.
c:\users\jane.doe\documents\Bulk Archive\W1FCR2-ATZK-LZ\2012 – Bde S1
- Click **Update Folders**
- Open up your **E-mail** account in **Outlook** and your **Office Records List** with electronic folders populates.
- You may now **drop and drag your E-mails** to the appropriate file #.
- Remember you must run **the E-mail Bulk Archive Tool again if you wish to add new electronic folders to your Outlook.** Only electronic file numbers will transfer to Outlook.

Lesson Activity #14 – Search for Electronic Documents:

- Go to **“Search”**
- Click on **“Search for Records”**
- Click on **“Electronic Folder”**
- Go to **2013 or 2012 & Criteria** (Bottom of Page)
- Click on **Record Series, Record Sub-Series, Duration** and **Submit Search**
- Ensure your correct Office Records List is reflected and **Electronic Records** is checked
- Records will appear. **Click on Records title and open to view the records.**
- You may also search by - Clicking on **keywords or record number** for your search. Make note that the Master Index has criteria for 2011 and 2012 searches if you desire to search by record series.

Notes

- Avery 5161 Labels will print labels correctly; You may also cut and paste files to word to print; Bar labels must be printed with all permanent hard copy folder labels.

References:

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DA PAM 25-403, Guide to Recordkeeping in the Army
11 August 2008

AR 25-1, Army Knowledge Management and Information Technology Management,
4 December 2008

USARMDA ARIMS Users Guide, August 2009

MCoE Pamphlet 25-51
Information Management: Records Management Office Symbols, Apr 12

For Additional Information - Log on to <https://www.arims.army.mil>

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