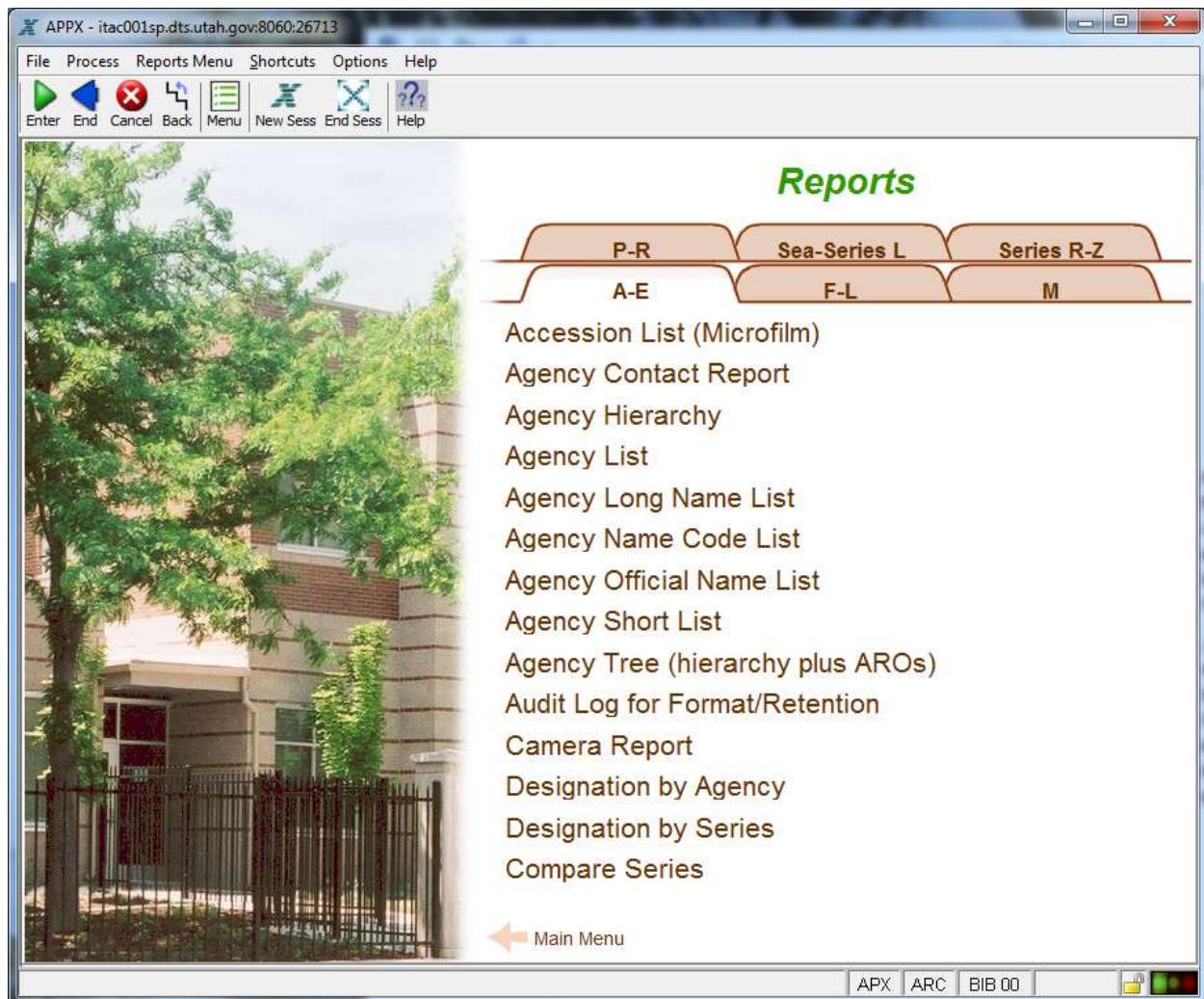


Reports Menu

August 10, 2016

The Reports menu exists to gather together all of the various reports that have been created over the years into one place. Many of these reports are also available on other menus. Some of the reports are quite old, and perhaps not used. Others could be adapted to better reflect the data now available in the database. Since the time the Reports Menu was created, other reporting mechanisms have become available. Any time a table widget is used to display information, that data can be copied to a spreadsheet, as a sort of pseudo-report. Data can also be exported to .csv.

In addition, the APPX Report Writer, which is part of the APPX tool, is available for staff use on the Unique Processes Menu, Tables tab. That tool comes with its own instructions about how to use it, and will not be described here. Note that for that tool to be optimized for staff use, some changes should be made to the AXAEM data structure so that fields which are related from one table to another use data lookups, which will allow the Report Writer to offer a Join option between the two tables. Since the Report Writer has not been in active use by staff until now, some of those refinements have not been made. The descriptive names of tables and fields also impact the Report Writer and how users are able to effectively interact with it.



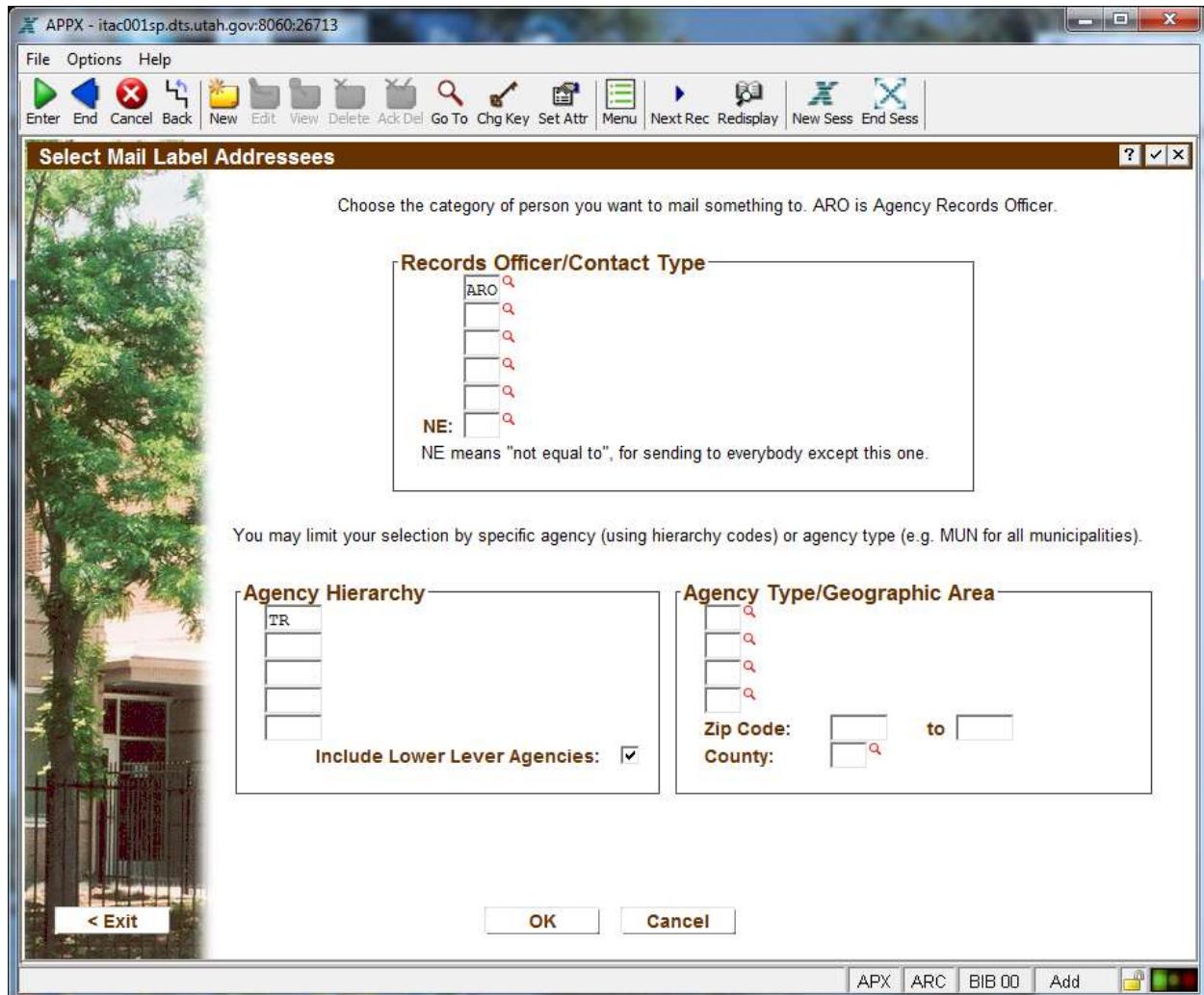
Accession List (Microfilm)

- Text report
- Query asks for:
 - Accession number range
 - Roll number range
 - Series number
 - Film format (defaults to MCR)
 - Date film received
 - Agency number
- Sort by:
 - Accession number
 - Series number
 - Roll number
- [Bug report: errors to Item Overlap Error]

Agency Contact Report

- PDF report

- Query is an input process
- Sort is automatically by surname
- Data includes:
 - Name of person
 - Agency name (at each level of the hierarchy)
 - Agency number
 - Person's address, phone, and email
 - Person's role, and for which agency



This input screen acts as a query to the Agency Contact Report. In the section labeled Records Officer/Contact Type, use the code for Records Officer (ARO), Chief Administrative Officer (CAO), or other role types. The more types you include, the longer the resulting list will be, so there is an understood “Or” happening in the contact type grouping. The last field in that group is for indicating you want everybody except those in a particular role. Within the Agency Hierarchy grouping, provide just the top level hierarchy and keep the Include Lower Level Agencies checkbox checked to grab all agencies in that hierarchy, or else identify each hierarchy level that you do want. [Bug report: fix spelling of label from Lever to Level.] This report can also query the mailing list geographically. In the Agency

Type/Geographic Area section, pick one or more agency types (such as SG for State Government or CNT for Counties), a zip code range, or county code. Agency types also have an understood “Or” happening between them, whereas zip code and county would limit the list. Click OK to save your query and run the report.

The screenshot shows a PDF document titled "Agency Contact Report". It contains three entries, each with a name, agency, address, phone number, and email. The names are David Adamson, Records Officer, and Jennifer Avila. The contact information is as follows:

David Adamson
Department of Transportation (1177)
Department of Transportation. Region One (2464)
166 West Southwell Street
Ogden, UT 84404
(801) 781-0545
deadamson@utah.gov

Records Officer
Department of Transportation. Region One (2464)

Jennifer Avila
Department of Transportation (1177)
Department of Transportation. Project Development. Consultant Services Division
4501 South 2700 West
Salt Lake City, UT 84114
(801) 965-4398
javilla@utah.gov

[Bug report: it appears that long agency names are getting cut off rather than wrapping to the next line.]

Agency Hierarchy

- PDF report
- Query asks for:
 - Agency hierarchy levels 1 through 5
 - Agency MARC coded name (official name)
 - Agency type
 - Agency created date
 - Agency dissolved date
 - Whether the agency is defunct
- No sort screen. Default appears to be alphabetical by agency name.
- Data includes:
 - Agency name
 - Agency hierarchy
 - Agency number

AGENCY LIST BY TITLE AND HIERARCHY

Agency Name:	Communications Office	01181
Lvl 1	TR	Transportation Department
Lvl 2	CRO	Community Relations Office
Lvl 3		
Lvl 4		
Lvl 5		
Agency Name:	Equipment Operations	03621
Lvl 1	TR	Transportation Department
Lvl 2	OP	Operations Administration
Lvl 3	TBO	Traffic Equipment Operations
Lvl 4		
Lvl 5		
Agency Name:	Motor Carrier Advisory Board	03989
Lvl 1	TR	Transportation Department
Lvl 2	MCB	Motor Carrier Advisory Board

Agency List

- PDF report
- Query asks for:
 - Agency hierarchy levels 1 through 5
 - Agency type
 - Agency created date
 - Agency dissolved date
 - Whether the agency is defunct
 - Agency report category
- Sort is by agency hierarchy, and alphabetical by name within the same hierarchy level
- Data includes:
 - Agencies with their hierarchy codes, indented
 - Agency number

Archives			Page: 1
Agency Hierarchy List			06/20/16 14:39
			APX
<hr/>			
Govt: TR	Transportation Department		
	Transportation Department	1177	
Dept: ARC	Aeronautics Commission		
	Transportation Aeronautics	60	
Dept: AS	Administrative Services		
	Transportation Admin Services	1178	
Div: DP	Data Processing		
	Transportation Data Processing	1813	
Div: HRM	Human Resource Management		
	Transportation Personnel	2427	
Div: PRM	Procurement		
	Transportation Procurement	2428	
Div: RM	Records Management		
	Transportation Library/Records	1179	
Div: RSK	Risk Management		
	Transportation Risk Management	2430	
Div: TRN	Training		
	Transportation Training	2429	
Dept: ATC	Utah Air Travel Commission Board		
	Utah Air Travel Commission Bd	3994	

Agency Long Name List

- PDF report
- Query asks for:
 - Agency number range
 - RLIN agency ID number (agency name prefaced with an H, leading zeros to make number 5-digit, the agency key, followed by an A)
 - Agency MARC coded name (official name)
 - Agency hierarchy levels 1 through 3
 - Who changed the agency
 - Agency created date
 - Agency dissolved date
 - Agency type
 - Whether the agency is defunct
 - Agency report category
- Sort is by:
 - Agency number
 - Agency long name
 - Agency hierarchy codes
- Data includes:
 - Agency number
 - Agency long name
 - RLIN agency number

Archives
Agencies Long Name List

60	Department of Transportation. Aeronautics Committee	RLIN ID H00060A
61	Department of Transportation. Division of Aeronautics	RLIN ID H00061A
219	Department of Transportation. Office of the Comptroller	RLIN ID H00219A
306	Department of Transportation. Region Two	RLIN ID H003D6A
346	Department of Transportation. Region Two (Salt Lake City). Encroachment Office	RLIN ID H00346A
673	Department of Transportation. Project Development. Materials and Research Section	RLIN ID H00673A
763	Department of Transportation. Project Development Division	RLIN ID H00763A

Agency Name Code List

- PDF report
- No query
- No sort
- Data includes
 - Hierarchy code
 - Level at which the hierarchy code appears
 - Name associated with the hierarchy code

Archives
Agency Name List

Struct	L:	Entity
Code	N:	Type
1	Box Elder	
3		
4		
1	3 Circuit Courts (1st)	
10	3 Circuit Courts (10th)	
11	3 Circuit Courts (11th)	
111	1 Utah County Service District	
12	3 Circuit Courts (12th)	
14J	4 Section 14 Juab	
2	3 Circuit Courts (2nd)	
2JP	2 Justice of the Peace/St. George	
3	3 Circuit Courts (3rd)	
35	4 District 5	
410	1	
5	3 Circuit Courts (5th)	
6	3 Circuit Courts (6th)	
7	3 Circuit Courts (7th)	

Agency Official Name List

- PDF report
- Query asks for (and has a Page Down requirement):
 - Agency number
 - Agency hierarchy levels 1 through 5
 - Agency type
 - Agency date added range
 - Who added the agency (range)
 - Agency changed when range
 - Who changed the agency
 - Agency history compiled by
 - Agency history compiled date range
 - Agency ARDOCS TRACK key (is agency available to Versatile)
 - Agency MARC coded name (official name)
 - Agency address line 1
 - Agency address line 2
 - Agency's city
 - Agency created date
 - Agency dissolved date
 - Whether agency is defunct
 - Agency reporting category
- Sort is by:
 - Entity name
 - Agency hierarchy levels 1 through 5
 - Agency number
 - Agency RLIN history date
- Data includes:
 - Agency number
 - Agency official (MARC-coded) name
 - Who added the agency
 - Agency added date
 - RLIN agency number

Screenshot of a web browser showing a PDF viewer interface. The main content area displays a table titled "Archives Agencies Listing by Official Name". The table has two columns: "Agency Number" and "Official Agency Name". The data includes:

Agency Number	Official Agency Name
1181	Utah.\$bDepartment of Transportation.\$bOffice of Community Relations (H01181A) Added: By: ELA Liz Asplund
3621	(91-A) Added: 11/15/2012 00:00 00 By: WGF Glen Fairclough
3989	(91-A) Added: 05/15/2014 14:42 34 By: WGF Glen Fairclough
3990	(91-A) Added: 05/15/2014 14:57 42 By: WGF Glen Fairclough
3991	(91-A) Added: 05/15/2014 15:07 11 By: WGF Glen Fairclough
3622	Department of Transportation.\$b Program Development Division (91-A)

The top right of the PDF viewer shows the page number (Page 1), date (06/20/16 15:21), and file type (APX). The bottom right of the PDF viewer shows options like "Create PDF", "Edit PDF", "Comment", "Control File", "Fill & Sign", "Send for Signature", and "Send to Track". A note at the bottom says "Show and download in the Document Cloud (optional)".

Agency Short List

- PDF report
- Query asks for (with a Page Down requirement):
 - Agency number
 - Agency hierarchy levels 1 through 5
 - Agency type
 - Agency date added range
 - Who added the agency (range)
 - Agency changed when range
 - Who change the agency
 - Agency history compiled by
 - Agency history compiled date range
 - Agency ARDOCKS TRACK (is agency available to Versatile)
 - Agency MARC coded name (official name)
 - Agency address line 1
 - Agency address line 2
 - Agency's city
 - Agency created date
 - Agency dissolved date
 - Whether agency is defunct
 - Agency report category
- Sort by:
 - Agency short name (aka common name)
 - Agency hierarchy levels 1 through 5
 - Agency number
 - Agency RLIN history date

- Data includes:
 - Agency short name
 - Agency number
 - Agency hierarchy codes

Archives Agencies Short List					
Communications Office	1181 TR	CRO			
Equipment Operations	3621 TR	OP	TEO		
Motor Carrier Advisory Board	3989 TR	MCB			
Multistate Highway Transportat	3990 TR	HTR			
Passenger Ropeway Safety Comm	3991 TR	ROPE			
Program Development Division	3622 TR	PRD			
Research Section	4084 TR	PRD	RSR		
Telecommunications Advisory Co	3992 TR	TRE			
Traffic Management	3623 TR	TTM			
Traffic Management Committee	3993 TR	TTM	TNC		
Transportation Admin Services	1178 TR	AS			
Transportation Aeronautics	60 TR	ARC			
Transportation Aeronautics Div	61 TR	OP	ARD		
Transportation Civil Rights	1814 TR	CIR			
Transportation Commission	3620 TR	TCO			
Transportation Comptroller	219 TR	COP			
Transportation Construction	1180 TR	PRE	CON		
Transportation Consultant Serv	3231 TR	PRE	CNV		
Transportation Data Processing	1813 TR	AS	DP		
Transportation Department	1177 TR				

Agency Tree (hierarchy plus AROs)

- PDF report
- Query asks for:
 - Agency number range
 - Agency dissolved date (defaults to blank)
 - Whether the agency is defunct
 - Whether the agency is Records Management Exempt
- Sort is automatic, alphabetic by department name, thereunder by agency hierarchy
- Data includes:
 - Agency name
 - Agency address
 - Agency phone number
 - Records officer names
 - Records officer title
 - Records officer address and email
 - Records officer role
 - Records officer training certification dates

Agencies of the State of Utah
with Authorized Records Officers

Updated: 06/20/2016 03:52 PM

Department of Agriculture and Food

350 North Redwood Road, P.O. Box 146500, Salt Lake City UT 84114-6500
538-7100

Records Officer(s)

Mr. Thayne R Mickelson
Executive Director
350 North Redwood Road
PO Box 146500
Salt Lake City, UT 84116-6500
E-mail: tmickelson@utah.gov
Description of Role: I am the Executive Director of the Utah Conservation Commission. We hold records for the 38 Conservation Districts throughout Utah.

Records Officer Certification

Initial Certification: 10/27/2014
Most Recent Certification: 10/27/2014
Certification Expires: 10/27/2015
Records Officer's certification has expired.

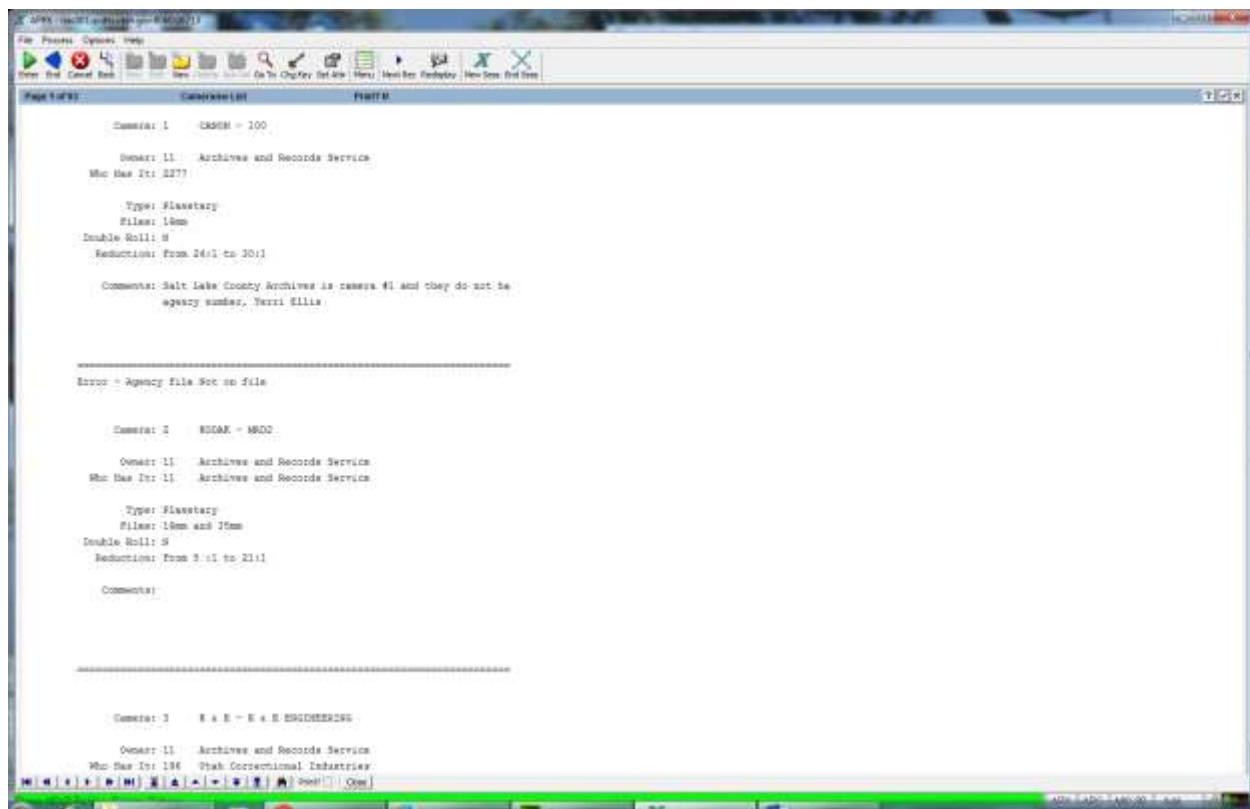
Audit Log for Format/Retention

- PDF report
- Query asks for:
 - Audit log date/time added range
 - Series number (aka BIBLGRPC KEY)
 - Audit log who added (aka who changed the format management record)
- Sort is by:
 - Series number
 - Format management sequence number
 - Audit log date/time
 - Audit log who added
- Data includes:
 - Series number
 - Format management sequence number
 - Date changed
 - Audit log who added
 - Format management statement

Archives Logformat Output				
Level	Biblgrpc Key	Date	Who	
series	1471	1 03/27/2006	APX	Paper: For records beginning in 1896 through 1969. Retain in State Archives until microfilmed and then destroy provided microfilm has passed inspection.
series	1471	1 02/06/2007	RC	Paper: For records beginning in 1896 through 1969. Retain in Delete format permanently after being microfilmed and then destroy provided microfilm has passed inspection.
series	1471	2 03/27/2006	APX	Microfilm master: Retain in State Archives permanently with authority to weed.
series	1471	3 03/27/2006	APX	Microfilm duplicate: For records beginning in 1896 through 1969. Retain in State Archives permanently with authority to weed.
series	1471	3 02/06/2007	RC	Microfilm duplicate: Retain in State Archives permanently

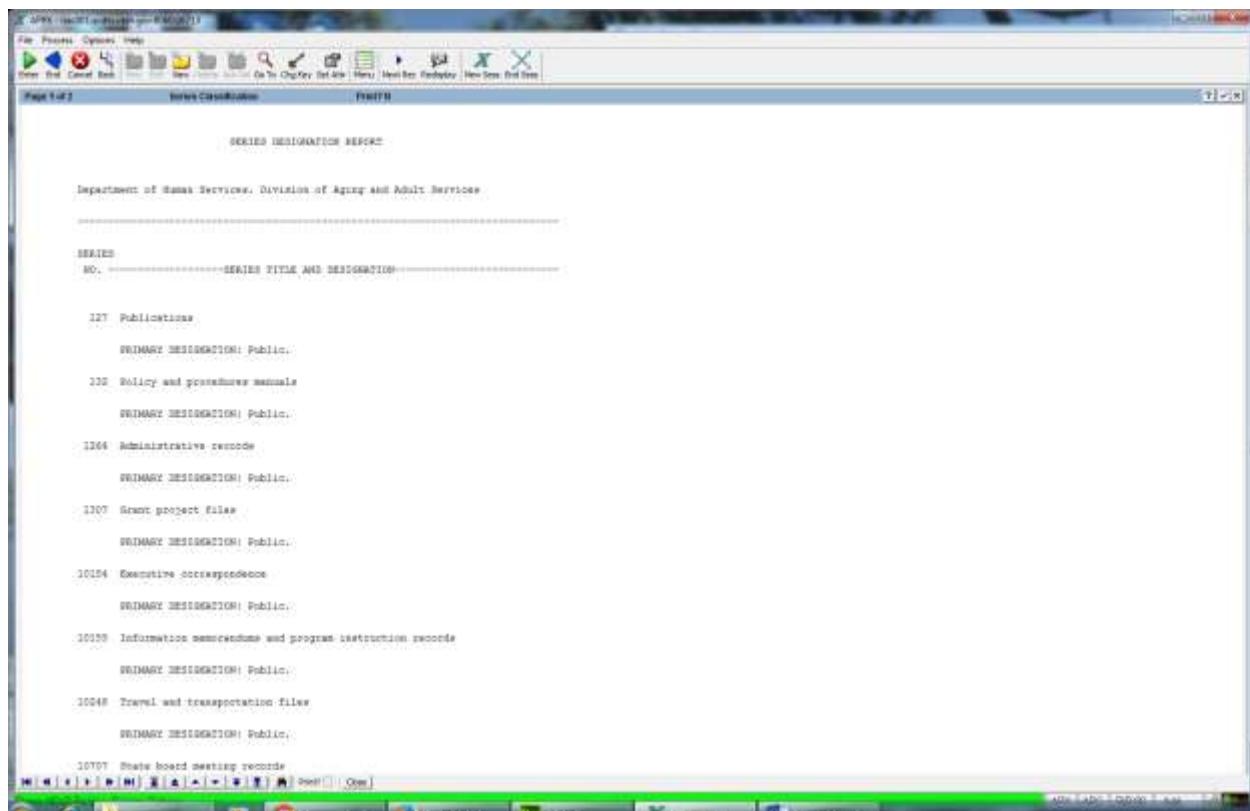
Camera Report

- Text report
- Query asks for:
 - Camera number range
- No sort, defaults by camera number
- Data includes
 - Camera number
 - Camera name
 - Agency that owns the camera
 - Agency that currently is using the camera
 - Camera type
 - Film type
 - Whether it supports double rolls
 - Reduction rates
 - Comments



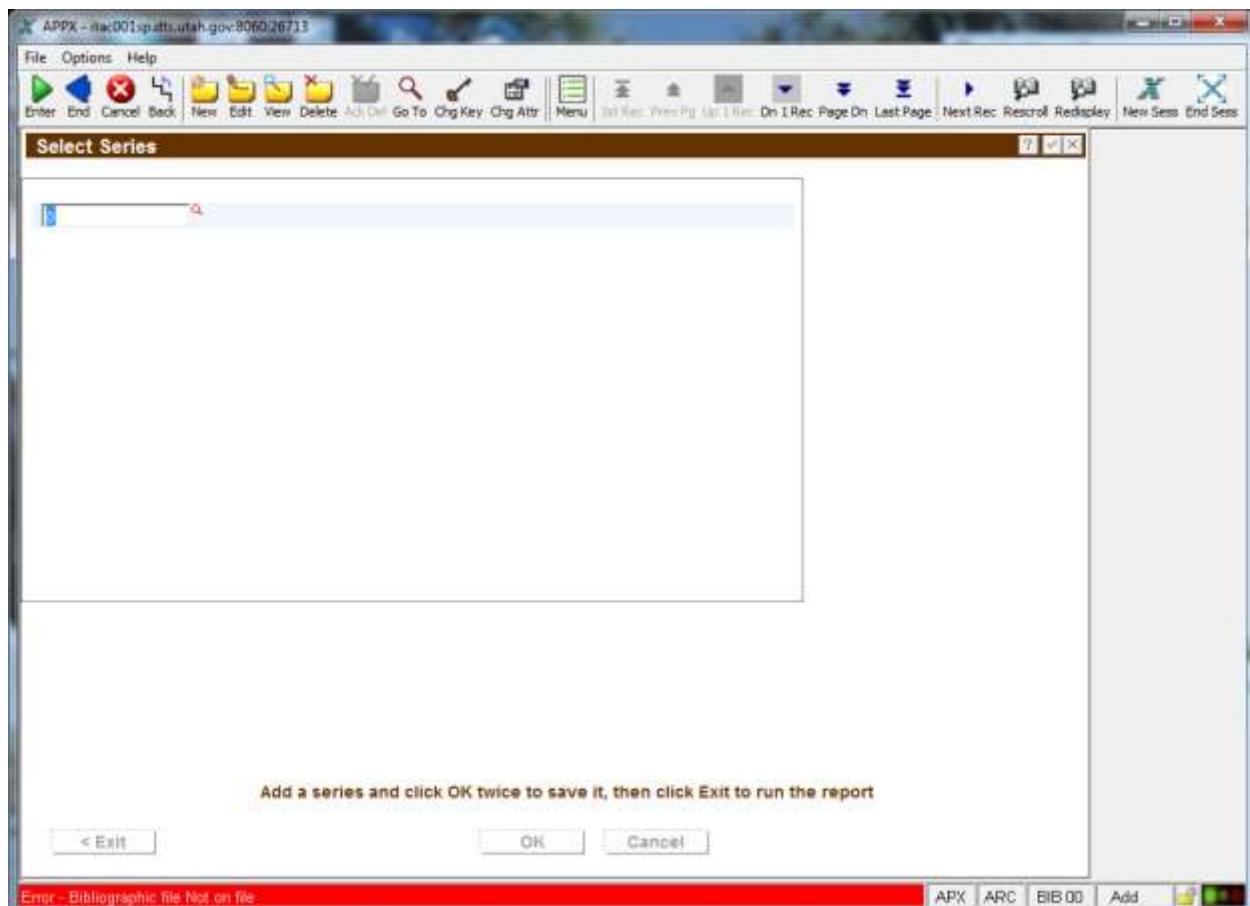
Designation by Agency

- Text report
- Query asks for:
 - Agency number
 - Agency hierarchy levels 1 through 5
- Sort by:
 - Agency hierarchy levels 1 through 5
 - Agency MARC coded name (official name)
 - Series number
 - Short record series title
- Data includes:
 - Agency name
 - Series number
 - Series title
 - Primary and secondary designations (aka classifications)
 - Citation or data elements related to designation



Designation by Series

- Text report
- Query is an input process



[Bug report: Series record id should have blank value set to null so the error does not appear.]

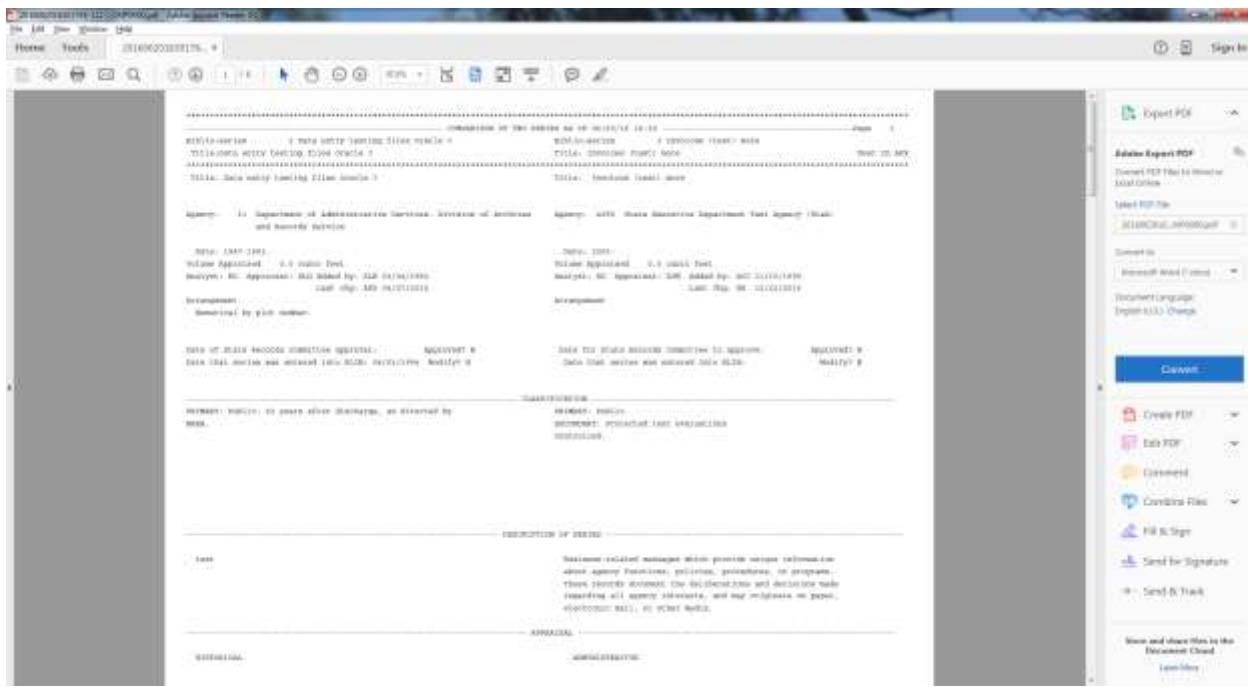
[Bug report: navigational elements do not work on this screen, likely due to the scrolling frame having graphical elements defined.]

[Bug report: The series record id scan doesn't appear to produce a working value, report brings back no records.]

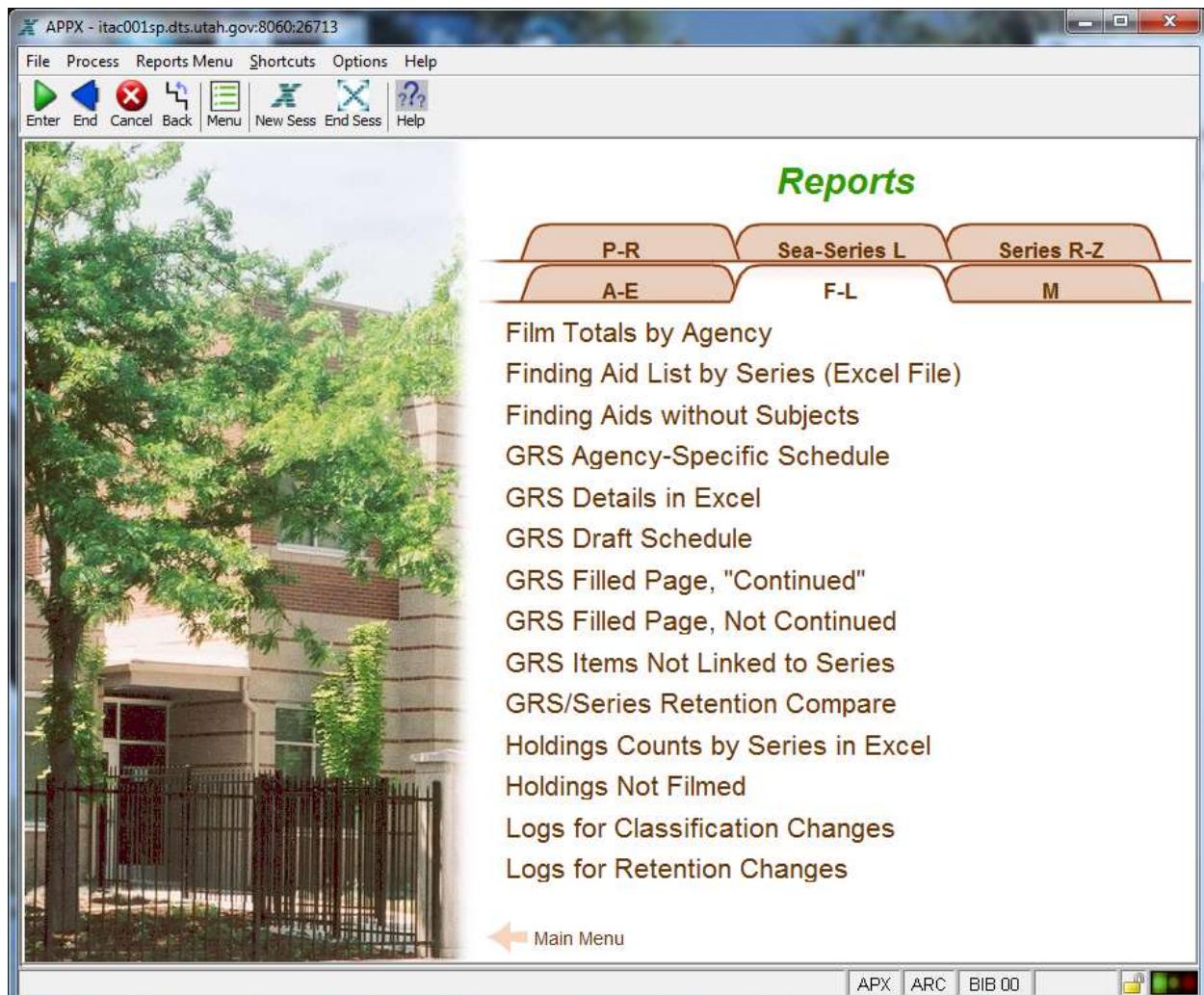
Compare Series

- PDF report
- Query is an input process, asks for series number to keep and series number to merge.
- No sort
- Date includes:
 - Series number
 - Series title
 - Agency number
 - Agency title
 - Series dates
 - Volume appraised
 - Analyst assigned to series
 - Who appraised the series

- Series added by
- Series added when
- Series last changed by
- Series last changed when
- Arrangement
- State Records Committee approval date
- Whether or not the SRC has approved the series
- Date that series was cataloged (aka entered into RLIN)
- Whether considered scheduled (aka modify)
- Primary and secondary designations
- Schedule description
- Appraisal value and text
- Personal data elements
- Series related to, and how
- Old box locations
- Total microfilm count
- Microfilm accession numbers
- Reference copy film reel number and accession number
- Custody history
- Access points
- Variant titles
- Finding aids
- Request permission to change logs
- Retention notes
- Who cataloged the record
- Cataloged date
- Cataloging notes
- Format management retention statements

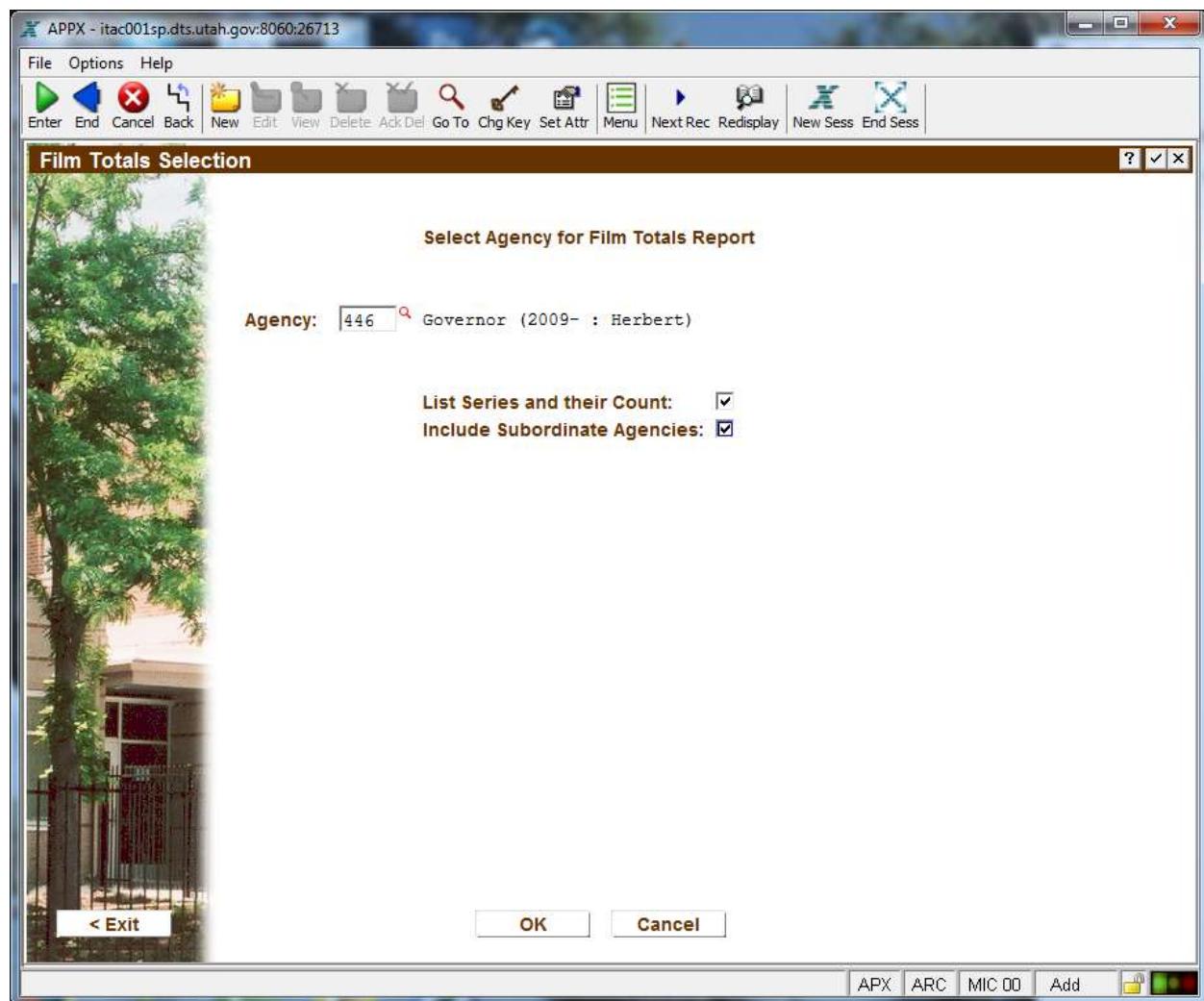


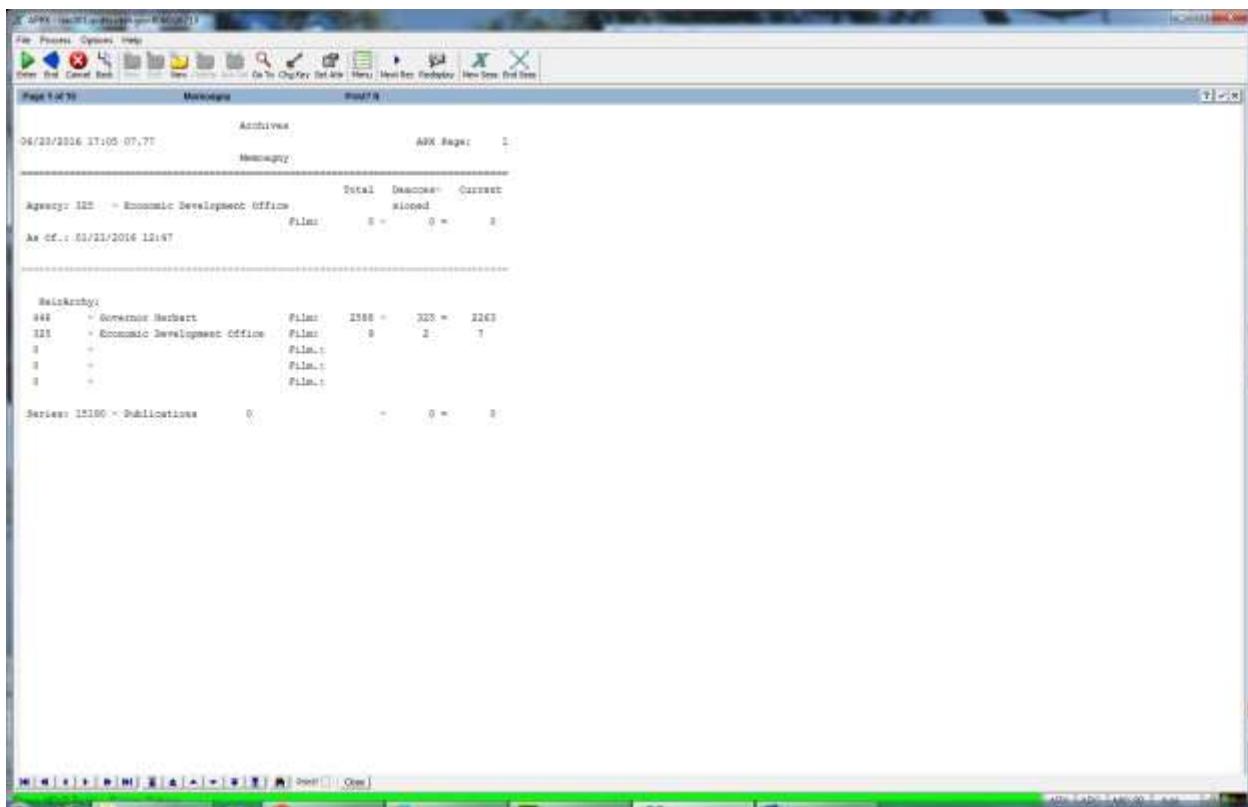
Click on tab F-L



Film Totals by Agency

- Text report
- Query is an input process, asks for:
 - Agency number
 - Whether to list series and their count
 - Whether to include subordinate agencies
- No sort
- Data includes:
 - Agency number
 - Agency name
 - Total number of film
 - Total film deaccessioned
 - Total current film
 - Date as of
 - Film numbers divided by series and hierarchy





Finding Aid List by Series (Excel File)

- Spreadsheet report
- Query asks for:
 - Finding aid type code
 - Agency history compiled date
- Sort by:
 - Series number (aka BIBLGRPC record id)
 - Finding aid sequence number
 - Agency name
 - Short record series title
- Data includes:
 - Series number
 - Finding aid sequence number
 - Finding aid date from
 - Finding aid date to
 - Series title
 - Finding aid text
 - Finding aid type code
 - Agency name
 - Series dates
 - Person who processed the series

	A	B	C	D	E	F	G	H	I	J
1	findaids_id	findaids_findingaid_type	findaids_findingaid_number	findaids_title	findaids_text	findaids_agency_name	series_dates		processed_by	
2	32	1		Medicaid information bulletins	\$ Department of Health, 1981-				AOT Anissa Taylor	
3	62	1		Administrative records	\$ Attorney General's Off 1902-				RH Rebekkah Shaw	
4	127	1		Publications	\$ Department of Human 1967-				RH Rebekkah Shaw	
5	165	1		Colorado River Commission case files	\$ Attorney General's Off 1925-1963,				JEK James Kichas	
6	171	1	1933	Laws, rules and regulations	\$ Utah State Board of Ag			1933	DHC David Clark	
7	180	1		Opinions (property tax)	\$ Attorney General's Off 1929-1964.				A8S Arlene Schmuland	
8	182	1		Messages to the legislature	\$ Governor (2009- : Herb 1851-				RH Rebekkah Shaw	
9	183	1		Administrative records	\$ Governor Bamberger 1913-1920.				WWC Wendy Checketts	
10	185	1		Water rights and irrigation records	\$ Governor Bamberger			1919	WWC Wendy Checketts	
11	186	1		Correspondence	\$ Governor Blood 1933-1940.				WWC Wendy Checketts	
12	187	1		Employment application correspondence	\$ Governor Blood 1932-1940.				WWC Wendy Checketts	
13	189	1		Deer Creek and Salt Lake aqueduct project files	\$ Governor Blood 1933-1940.				WWC Wendy Checketts	
14	190	1		Defense agencies administrative records	\$ Governor Blood			1940	WWC Wendy Checketts	
15	191	1		Relief programs	\$ Governor Blood 1933-1940.				WWC Wendy Checketts	
16	200	1		Upper Colorado River project case files	\$ Governor Clyde 1957-1964.				JEK James Kichas	
17	202	1		Correspondence [incoming]	\$ Governor Cutler 1905-1908.				RTO Ryan Oldroyd	
18	203	1		Correspondence [outgoing]	\$ Governor Cutler 1905-1908.				RTO Ryan Oldroyd	
19	206	1		Colorado River Compact subject file	\$ Governor Blood 1926-1936.				JEK James Kichas	
20	207	1		Conference, commission, and committee reports	\$ Governor Dern 1925-1931.				JEK James Kichas	
21	208	1		Expense ledger	\$ Governor Blood 1932-1940.				JEK James Kichas	
22	209	1		Speeches	\$ Governor Dern 1914-1933.				JEK James Kichas	
23	211	1		Correspondence	\$ Governor Lee 1949-1958.				A8B Alan Barnett	
24	214	1		Newspaper clippings	\$ Governor Lee			1956	A8B Alan Barnett	
25	215	1		Press releases	\$ Governor Lee 1949-1956.				A8B Alan Barnett	
26	216	1		Proclamations	\$ Governor Lee 1949-1950.				A8B Alan Barnett	
27	217	1		Speeches	\$ Governor Lee 1949-1956.				A8B Alan Barnett	
28	218	1		Administrative records	\$ Governor Mabey 1921-1925.				WWC Wendy Checketts	
29	219	1		Board and commission appointment records	\$ Governor Matheson 1969-1984.				KCR Kira Robertson	
30	221	1		Correspondence	\$ Governor Maw 1941-1948.				JEK James Kichas	
31	222	1		Reserve documents	\$ Governor Matheson 1969-1984.				UHM University of Hawaii	

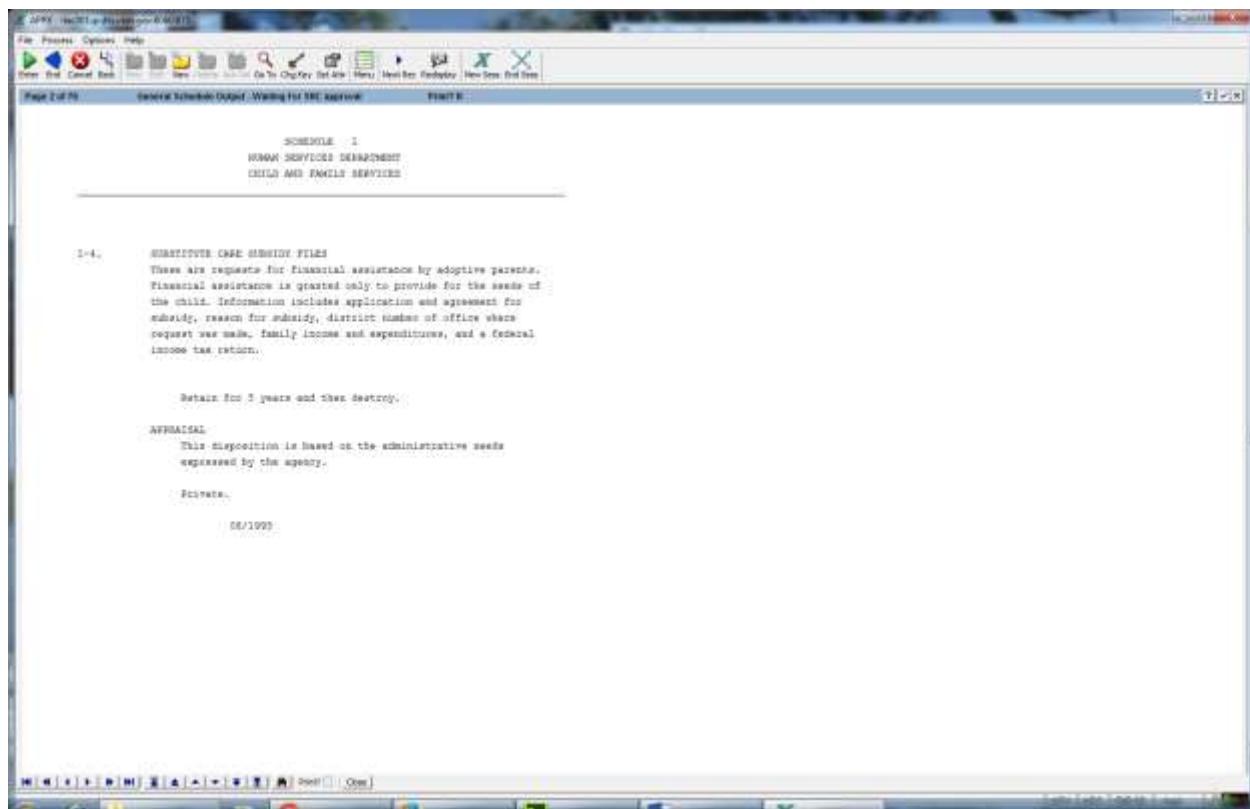
Finding Aids without Subjects

- Spreadsheet report
- Query asks for finding aids type code
- Sort by:
 - Series number (aka BIBLGRPC record id)
 - Finding aid sequence number
 - Agency name
 - Short record series title
- Data includes
 - Series number
 - Finding aid sequence number
 - Finding aid date from
 - Finding aid date to
 - Series title
 - Finding aid text
 - Finding aid type code
 - Agency name
 - Series dates
 - Person who processed the series

findaids.xls - Excel										
File		Home		Insert		Page Layout		Formulas		Data
Paste	Calibri	-	11	A	A	=	=	Wrap Text	General	
	B	Z	Y	X	Y	Z	X	Merge & Center	\$ % %	4%
Dashboard		Form				Alignment			Number	
									Styles	
									Cells	
										Editing
1	findaids_id	findaids_f	findaids_cf	findaids_c	findaids_title					
2	32	1			Medicaid information bulletins					
3	62	1			Administrative records					
4	127	1			Publications					
5	171	1	1933	1933	Laws, rules and regulations					
6	200	1			Upper colorado river project case files					
7	206	1			Colorado River Compact subject file					
8	207	1			Conference, commission, and committee reports					
9	208	1			Expense ledger					
10	209	1			Speeches					
11	360	2			Utility companies annual reports					
12	371	2			Cemetery deed records	Series Inventory	S			
13	424	1			Annual reports	Series Inventory	S			
14	425	1			Reports		S			
15	443	1			Publications		S			
16	448	1			Reports		S			
17	458	1			Committee records		S			
18	526	2			Annual reports		S			
19	546	1			Board minutes		S			
20	553	2			Publications		S			
21	628	2			Publications		S			
22	632	1			General orders and amendments		S			
23	657	1			Natural disaster hazard reports		S			
24	658	1			Administrative records		S			
25	776	1			Professional licenses and certificates register		S			
26	787	1			Correspondence		S			
27	788	1			Financial records		S			
28	794	2			Publications		S			
29	808	1			Annual reports	Series Inventory	S			
30	835	1			Administrative records		S			
31					Bulletin/Calendar documents		S			

GRS Agency-Specific Schedule

- Text report
 - Query asks for:
 - General schedule type
 - General schedule number range
 - General schedule item range
 - Agency number
 - No sort, defaults by schedule type, number, and item number
 - Data includes:
 - Name of schedule
 - Number of schedule
 - Agency name
 - Item number
 - Item title
 - Item description
 - Total retention
 - Appraisal
 - GRAMA designation
 - Date approved by the State Records Committee



GRS Details in Excel

- Spreadsheet report [Bug report: print disposition screen comes up]
- Query asks for:
 - Is this a general schedule
 - General schedule number
 - General schedule item
 - Agency number
 - General schedule type
- Sort by:
 - General schedule type
 - General schedule number
 - General schedule item
- Data includes:
 - Series number
 - Agency number
 - Agency name
 - Agency type
 - Schedule number
 - Item number
 - Item title
 - State Records Committee approval date
 - Date added
 - Security level

- Series attached
- Item description
- Retention for record copy
- Retention for duplicate copy
- Primary GRAMA designation
- Secondary GRAMA designation(s)
- Series updated date
- Made obsolete date

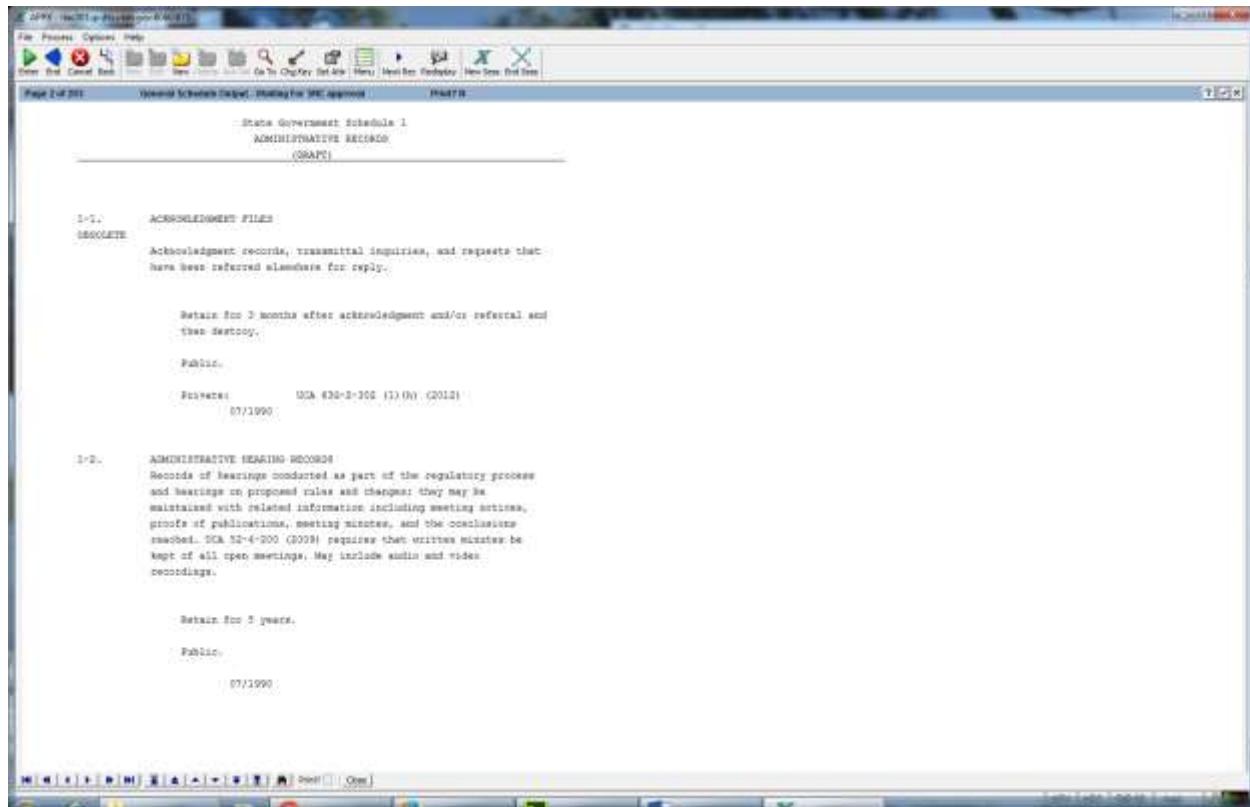
grdetails.csv - Excel

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	agency	agency number	agency type	schedule type	item number	title	SRC	date added	security level	series attached	schedule retention	retention type	primary designation	secondary designation	obsolete date		
1	agency	agency number	agency type	schedule type	item number	title	SRC	date added	security level	series attached	schedule retention	retention type	primary designation	secondary designation	obsolete date		
2	1228	Department SG	1	1 INCIDENT	1	INCIDENT	Jun-14	4/3/1998	3 no clue		These reports are pre 10 years at PUB		PRO	PRI			
3	229	Department SG	1	1 ASBESTOS	1	ASBESTOS	Oct-00	6/18/1998	3 no clue		Records d 10 years at 30 years at PUB						
4	3492	Department SG	1	1 BOUNDARY	1	BOUNDARY	Oct-08	7/29/2008	3 no clue		These are 30 years at Permanent PUB						
5	0	SG	1	1 ACKNOWLEDGEMENT	1	ACKNOWLEDGEMENT	Jul-90		3 no clue		Acknowledge Permanent: 3 months PUB		PRI		02/20: ######		
6	1116	Department SG	1	1 CLIENT CA	1	CLIENT CA	Feb-16		3 no clue		These are 3 months at 50 years at PRI		CON		02/2016		
7	1228	Department SG	1	2 GENERAL OFFICE OPI	1	GENERAL OFFICE OPI	4/3/1998		1 no clue		These rec 50 years at 2 years at PUB						
8	229	Department SG	1	2 AUDIT REC	1	AUDIT REC	Oct-00	8/28/1998	3 no clue		These are 2 years at Permanent EXE		PRO				
9	3492	Department SG	1	2 CLIMATOL	1	CLIMATOL	Oct-08	7/29/2008	3 no clue		These are Permanent Permanent PUB						
10	0	SG	1	2 ADMINIST	1	ADMINIST	Jul-90		3 no clue		Records d Permanent: 5 years at PUB						
11	1116	Department SG	1	2 SUBSTITUTE	1	SUBSTITUTE	Aug-95		3 no clue		These file 5 years at 25 years at CON		PRI				
12	1228	Department SG	1	3 CITATION	1	CITATION	Jul-14	4/3/1998	3 no clue		These rec 25 years at 10 years at PUB		PRI	PRO			
13	229	Department SG	1	3 AUDIT WC	1	AUDIT WC	Oct-00	8/27/1998	3 no clue		This files 10 years at 5 years at PRO		PUB				
14	3492	Department SG	1	3 PLANNING	1	PLANNING	Oct-08	7/29/2008	3 no clue		These are 5 years at Permanent PUB						
15	0	SG	1	3 ADMINIST	1	ADMINIST	Jul-90		3 no clue		Record of Permanent 1 year or 1 PUB			02/20: ######			
16	1116	Department SG	1	3 SUBSTITUTE	1	SUBSTITUTE	Aug-95		3 no clue		These are 1 year or u 6 years at PRI		CON				
17	1228	Department SG	1	4 VIOLENT FELONY REC	1	VIOLENT FELONY REC	4/3/1998		1 no clue		These are 6 years at 10 years at PUB						
18	229	Department SG	1	4 CONTRAC	1	CONTRACT	Oct-00	8/27/1998	3 no clue		These rec 10 years at 6 years at PUB						
19	3492	Department SG	1	4 SOCIETY R	1	SOCIETY R	Oct-08	7/29/2008	3 no clue		These rec 6 years at Permanent PUB						
20	0	SG	1	4 AGENCY H	1	AGENCY H	Jul-90		3 no clue		Records u Permanent: 10 years at PUB			08/20: ######			
21	1116	Department SG	1	4 SUBSTITUTE	1	SUBSTITUTE	Aug-95		3 no clue		These are 10 years at 5 years at PRI						
22	1228	Department SG	1	5 INTERNAL AFFAIRS R	1	INTERNAL AFFAIRS R	4/3/1998		1 no clue		These are 5 years at 20 years at PUB						
23	229	Department SG	1	5 CORRESP	1	CORRESP	Oct-00	6/19/1998	3 no clue		Records o 20 years at 2 years at PUB			10/20: ######			
24	0	SG	1	5 ATTORNEY	1	ATTORNEY	Dec-05		3 no clue		Copies of 2 years at Retain um PRI			06/20: ######			
25	1116	Department SG	1	5 DENIED SL	1	DENIED SL	Aug-95		3 no clue		These are Retain until 5 years at PRI		CON	03/20	3/7/2016		
26	1228	Department SG	1	6 CATEGORY TWO INV	1	CATEGORY TWO INV	4/6/1998		1 no clue		These are 5 years at 10 years T PRI						
27	229	Department SG	1	6 CORRESP	1	CORRESP	Oct-00	6/18/1998	3 no clue		Records n 10 years T 5 years at PUB			10/20: ######			
28	3492	Department SG	1	6 GEO-SCIEF	1	GEO-SCIEF	Oct-08	7/29/2008	3 no clue		These rec 5 years at Permanent PUB						
29	0	SG	1	6 COMMITTE	1	COMMITTEE	Jul-90		3 no clue		Records o Permanent Permanent PUB			03/20: ######			
30	1116	Department SG	1	6 DEVELOPM	1	DEVELOPMENT	Aug-95		3 no clue		These file Permanent: 6 years at PRI		CON				
31	1116	Department SG	1	7 MAINTENANCE	1	MAINTENANCE	4/5/2000		4 no clue		These file Permanent Permanent PUB						

GRS Draft Schedule

- Text report
- Query asks for:
 - General schedule type
 - General schedule number range
 - General schedule item range
- No sort, default is by schedule number, thereunder by item number
- Data includes:
 - Schedule name
 - Schedule number
 - Item number

- Item title
- Item description
- Retention
- Primary GRAMA designation
- Secondary GRAMA designation(s)
- Date approved by the State Records Committee
- Whether obsolete

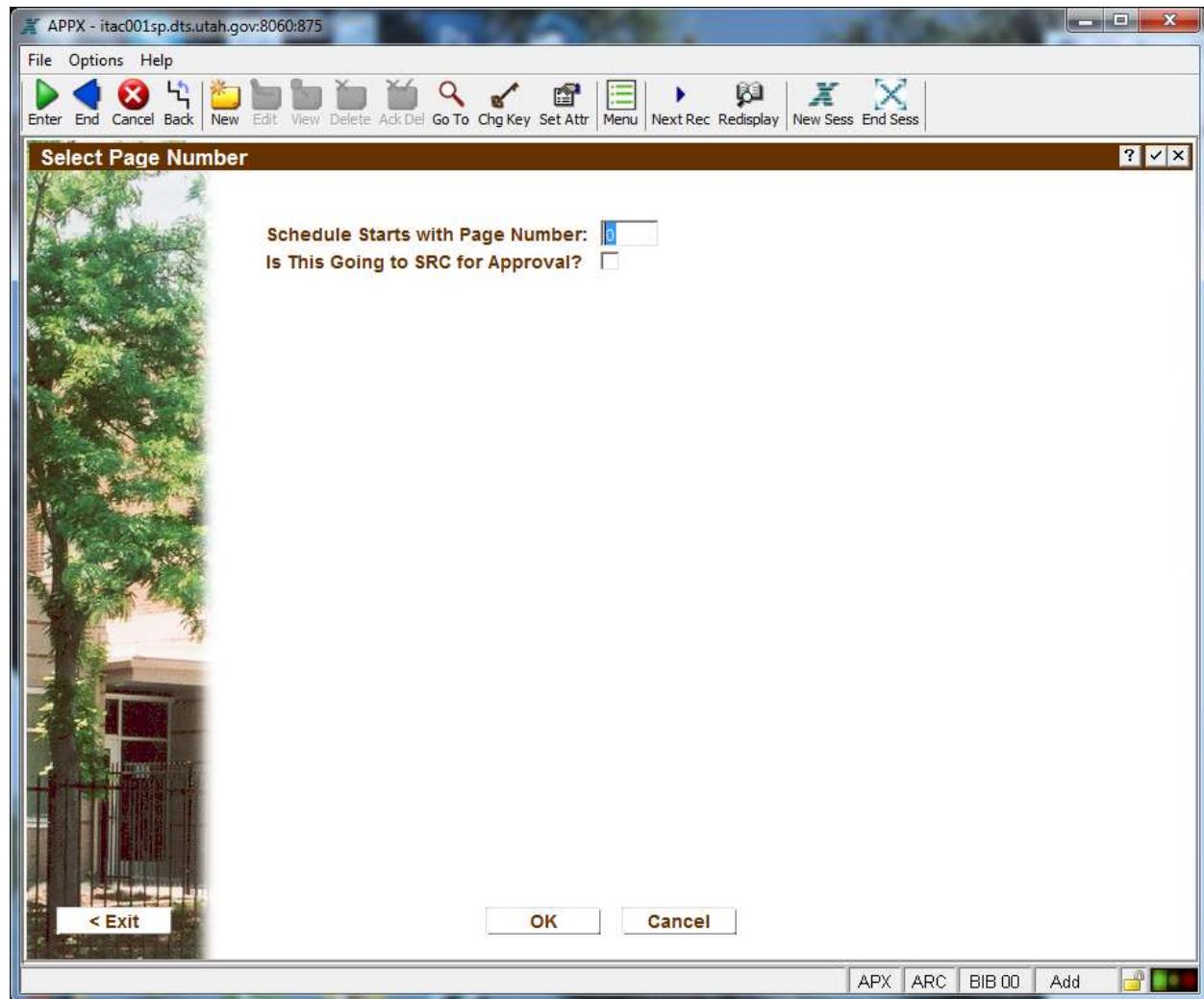


GRS Filled Page, "Continued"

This report will divide a schedule item across pages so as to make the most efficient use of paper, so the second page is "continued" from the first.

- PDF report
- Uses input process to gather details about how the report should print
 - Schedule starts with page number what
 - Is this schedule going to the State Records Committee for approval (that field does not influence anything on this version of the general schedule reports)
- Query asks for:
 - General schedule type
 - General schedule number range
 - General schedule item range
- No sort, defaults by schedule type, schedule number, and then item number
- Data includes:

- Schedule name
- Schedule number
- Item title
- Item number
- Item description
- Retention
- Date approved by the State Records Committee



SCHEDULE 1
ADMINISTRATIVE RECORDS

ACTIVITY REPORTS (Item 1-48)
Reports documenting work productivity of employees or an office. Includes weekly activity or production reports, monthly activity reports, etc.

RETENTION
Retain by agency for 1 year or until resolution of issue and then destroy.

(Approved 12/05)

ADMINISTRATIVE HEARING RECORDS (Item 1-2)
Records of hearings conducted as part of the regulatory process and hearings on proposed rules and changes; they may be maintained with related information including meeting notices, proofs of publications, meeting minutes, and the conclusions reached. UCA 52-4-200 (2009) requires that written minutes be kept of all open meetings. May include audio and video recordings.

RETENTION

An index is automatically generated at the end of the report, for use in publishing the schedule.

Archives
Gensched Index

General Schedule Number: 1

	Page
ACTIVITY REPORTS	1-48
ADMINISTRATIVE HEARING RECORDS	1-2
ADMINISTRATIVE RULE RECORDS	1-42
AGENCY HISTORY RECORDS	1-76
AMERICANS WITH DISABILITIES ACT REQUESTS FOR ACCOMMODATIONS	1-57
ANIMAL CONTROL RECORDS	1-67
CLOSED MEETING RECORDS	1-60
CONFERENCE SPONSORSHIP FILES	1-50
EXECUTIVE INTERNAL COMMITTEE RECORDS	1-79
FORMAL OPINION RECORDS	1-75
GOVERNMENT RECORDS ACCESS AND MANAGEMENT ACT (GRAMA) APPEALS CASE	1-68
INFORMATION GOVERNANCE RECORDS	1-66
INTERIM VERIFICATION FILES	1-55
INTERNAL COMMITTEE RECORDS	1-78
LEGAL COUNSEL RECORDS	1-74
MANAGEMENT ANALYSIS/FEASIBILITY STUDIES	1-10
OPEN MEETING MINUTES & PUBLIC MATERIALS	1-59
OPEN MEETING RECORDINGS	1-65

GRS Filled Page, Not Continued

This report will print an item on its own page and not split it across multiple pages.

- PDF report
- Uses the same input process as above to determine:
 - Schedule starts with page number what
 - Is this going to the State Records Committee for approval (prints items differently if it is)

- Query asks for:
 - General schedule type
 - General schedule number range
 - General schedule item range
- Data includes:
 - Schedule name
 - Schedule number
 - Item name
 - Item number
 - Item description
 - Retention
 - Disposition
 - Date approved by the State Records Committee

SCHEDULE 1
ADMINISTRATIVE RECORDS

ACTIVITY REPORTS (Item 1-48)
Reports documenting work productivity of employees or an office.
Includes weekly activity or production reports, monthly activity reports, etc.

RETENTION
1 year or until resolution of issue

DISPOSITION
Destroy

(Approved 12/05)

ADMINISTRATIVE HEARING RECORDS (Item 1-2)
Records of hearings conducted as part of the regulatory process and hearings on proposed rules and changes; they may be maintained with related information including meeting notices, proofs of publications, meeting minutes, and the conclusions reached. UCA 52-4-200 (2009) requires that written minutes be kept of all open meetings. May include audio and video recordings.

GRS Items Not Linked to Series

- Text report
- No query
- No sort, defaults to numerical by bibliographic record id
- No print disposition screen
- Data includes:
 - Bibliographic number (aka series number, although a general schedule is not a series)
 - General schedule type
 - General schedule number
 - General schedule item

	Recd	Sch	Scw	Tm
19620	SS	17<	18	
19647	SS	17<	17	
19648	SS	17<	18	
19649	SS	17<	18	
19650	SS	17<	23	
19651	SS	14<	37	
19601	GRM	1<	44	
19909	SS	23<	1	
19910	SS	23<	1	
19911	SS	18<	3	
19912	SS	23<	4	
19913	SS	23<	5	
20243	SS	18<	5	
20244	SS	23<	7	
20245	SS	23<	8	
20246	SS	18<	8	
20247	SS	23<	12	
20248	SS	18<	12	
20249	SS	18<	12	
20250	SS	18<	13	
20281	SS	18<	13	
20282	SS	18<	16	
20283	SS	18<	17	
20284	SS	18<	18	
20285	SS	18<	27	
20287	SS	18<	28	
20288	SS	18<	29	
20289	SS	18<	39	
20290	SS	18<	39	
20291	SS	18<	33	
20292	SS	18<	32	
20293	SS	8<	26	
20294	SS	18<	35	
20295	SS	18<	35	

GRS/Series Retention Compare

- Text report
- Query asks for:
 - Schedule category (meaning schedule type/agency type)
 - Schedule number
- Sort by schedule category
- Data includes:
 - Agency number
 - Schedule category
 - Schedule number
 - Schedule State Records Committee date
 - Item number
 - Item bibliographic record id
 - Date item approved by the State Records Committee
 - Item title
 - Number of time units for the retention of the general schedule
 - Time unit type for the retention of the general schedule
 - Whether the Destroy checkbox on the general schedule retention is Y/N
 - Series number
 - Date series was approved by the State Records Committee
 - Number of time units in the total format management retention information for the series
 - Time unit type for the total format management retention information for the series

- Series title

Agency	Date	Description
Item - 1 30204 07/1389	07/1389	ACRESCEDIMENT FILE
		3 MHM Descript#
13769 07/1389	3 MHM	House of Representatives
Item - 2 30207 07/1389	07/1389	ADMINISTRATIVE HEARING RECORDS
		3 VHM Descript#
84004 07/1389	3 EEB	Michigan Legal Services
15349 07/1389	3 EEB	Real Estate Division
27900 07/1389	3 EEB	Public Safety Inspection
28545 07/1389	3 EEB	Agriculture and Food Dept.
28564 07/1389	3 EEB	Nurse Licensing Commission
82122 07/1389	3 EEB	Family Health Services
81370 07/1389	3 EEB	Insurance Department
623 07/1389	3 EEB	Public Service Commission
442 07/1389	3 EEB	Public Service Commission
1304 07/1389	3 EEB	Alcoholic Beverage Control
1723 07/1389	3 EEB	Environmental Air Quality
1766 07/1389	3 EEB	Environmental Drinking Water
1777 07/1389	3 EEB	Environmental Air Quality
2259 07/1389	3 EEB	Driver's License Division
3187 07/1389	3 EEB	Legislative Fiscal Analyst
6033 07/1389	3 EEB	Medicaid and Health Financing
6633 07/1389	3 EEB	Radiation Control
6634 07/1389	3 EEB	Radiation Control
7576 07/1389	3 EEB	Environmental Air Quality
11284 07/1389	3 EEB	Intercommunity Power Agency
11776 07/1389	3 EEB	Industrial Commission
11241 07/1389	3 EEB	Merit System Council
9723 07/1389	3 EEB	Purchasing
9277 07/1389	3 EEB	Occupational Licensing
9293 07/1389	3 EEB	Real Estate Division
9295 07/1389	3 EEB	Real Estate Division
54149 07/1389	3 EEB	Health Board
12626 07/1389	3 EEB	Education School Law and Leg.
12953 07/1389	3 EEB	Education At-Risk Services
12222 07/1389	3 EEB	Office of Consumer Services
15307 07/1389	3 EEB	Auth & Community Based Services
14200 07/1389	3 PER	Labor Commission

Holdings Counts by Series in Excel

- Spreadsheet report
- Query asks for:
 - Agency number
 - Series number (aka bibliographic record id)
 - Agency hierarchy levels 1 through 5
- Sort by:
 - Agency number
 - Series number
 - Series title
- Data includes:
 - Agency number
 - Agency hierarchy codes
 - Agency reporting category
 - Agency FINET code
 - Whether or not the agency is defunct
 - Agency long name
 - Series number
 - Series title
 - Total boxes in Records Center
 - Total boxes in Archives

- Total film
- Total fiche
- Total electronic records

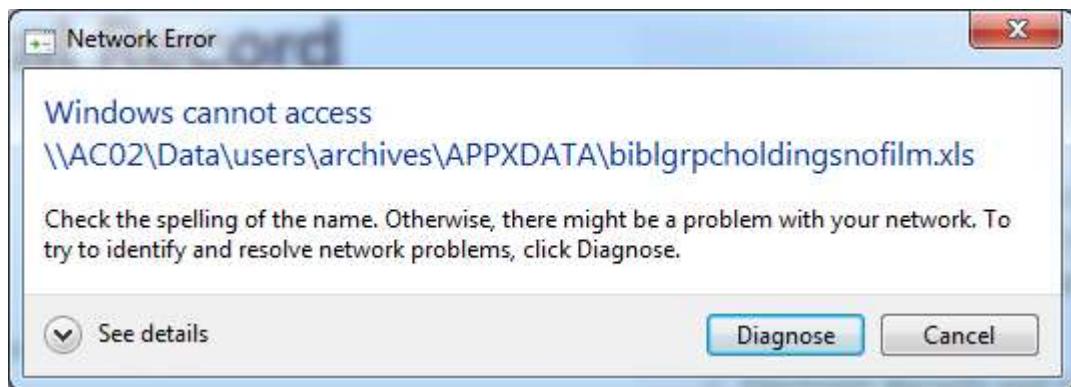
The screenshot shows an Excel spreadsheet titled "biblicounts.xls". The data is organized into columns:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	agency_n	agency_hi	agency_re	agency_f	agency_defunct	agency_long_narr	series_nu	series_title	total_boxes_R	total_bc	total_film	total_fiche	total_electr
2	2 HS AA	State Ager	200			Department of Hi	127	Publications	0	1	0	1	0
3	2 HS AA	State Ager	200			Department of Hi	132	Policy and proce	0	0	0	1	0
4	2 HS AA	State Ager	200			Department of Hi	166	Work program re	0	0	0	0	0
5	2 HS AA	State Ager	200			Department of Hi	1264	Administrative r	0	10	0	0	0
6	2 HS AA	State Ager	200			Department of Hi	1307	Grant project file	0	0	0	0	0
7	2 HS AA	State Ager	200			Department of Hi	1329	Financial record	0	0	0	0	0
8	2 HS AA	State Ager	200			Department of Hi	6228	Protective adult	0	0	0	0	0
9	2 HS AA	State Ager	200			Department of Hi	10154	Executive corres	0	8	0	0	0
10	2 HS AA	State Ager	200			Department of Hi	10155	Information mer	0	0	0	0	0
11	2 HS AA	State Ager	200			Department of Hi	10247	Personnel files f	0	0	0	0	0
12	2 HS AA	State Ager	200			Department of Hi	10248	Travel and transp	0	0	0	0	0
13	2 HS AA	State Ager	200			Department of Hi	10249	Daily activity sch	0	0	0	0	0
14	2 HS AA	State Ager	200			Department of Hi	10250	Staff agenda and	0	0	0	0	0
15	2 HS AA	State Ager	200			Department of Hi	10578	Fiscal review rec	0	0	0	0	0
16	2 HS AA	State Ager	200			Department of Hi	10707	State board mee	0	4	0	0	0
17	2 HS AA	State Ager	200			Department of Hi	10708	Advisory council	0	1	0	0	0
18	2 HS AA	State Ager	200			Department of Hi	10898	Accessioned put	0	1	0	1	0
19	2 HS AA	State Ager	200			Department of Hi	11784	Aging and adult	0	0	0	0	0
20	2 HS AA	State Ager	200			Department of Hi	17229	Ombudsman cas	0	0	0	0	0
21	2 HS AA	State Ager	200			Department of Hi	17230	Sub-state ombui	0	0	0	0	0
22	2 HS AA	State Ager	200			Department of Hi	17231	Adult day care cc	0	0	0	0	0
23	2 HS AA	State Ager	200			Department of Hi	17233	Client committe	0	0	0	0	0
24	2 HS AA	State Ager	200			Department of Hi	17234	District contract	0	0	0	0	0
25	2 HS AA	State Ager	200			Department of Hi	17486	Client case files	0	0	0	0	0
26	2 HS AA	State Ager	200			Department of Hi	17864	Investigation file	91	0	0	0	0
27	2 HS AA	State Ager	200			Department of Hi	19009	Time and attend	0	0	0	0	0
28	2 HS AA	State Ager	200			Department of Hi	19080	Contract files (A	0	0	0	0	0
29	2 HS AA	State Ager	200			Department of Hi	19391	Chronological fil	3	6	0	0	0
30	2 HS AA	State Ager	200			Department of Hi	22927	Training aids (Ad	0	4	0	0	0
	2 HS AA	State Ager	200			Department of Hi	36100	Commission on R&I	94	0	0	0	0

Holdings Not Filmed

- Spreadsheet report
- Query asks for:
 - Series number
 - Series title
 - Agency name
- Data includes:
 - Series number
 - Agency short name
 - Who processed the series

[Bug report: running report results in error, due to local server path being incorrect]



The screenshot shows an Excel spreadsheet with the following data:

SERIES NUMBER	TITLE	AGENCY	PROCESSED BY
16	Letterpress book	Salt Lake City Treasurer	
17	Special assessments-street lig	Salt Lake City Treasurer	
18	Special assessments-sewer ex	Salt Lake City Treasurer	
19	Special assessments-sidewalk	Salt Lake City Treasurer	
32	Medicaid information bulletin	Medicaid and Health Financir	AOT
46	Special assessments-waterma	Salt Lake City Treasurer	
47	Water assessment books	Salt Lake City Treasurer	
48	Correspondence (outgoing)	Salt Lake City Commission	
49	School district account book	Salt Lake City Treasurer	
50	Special taxes cash books	Salt Lake City Treasurer	
51	Special assessment property li	Salt Lake City Treasurer	
52	Release of indenture notices	Salt Lake City Treasurer	
53	Issued licenses reports	Salt Lake City Treasurer	
56	Special improvement tax sales	Salt Lake City Treasurer	
59	Special assessment ledgers	Salt Lake City Treasurer	
62	Administrative records	Attorney General's Office	RH
64	Case files	Attorney General's Office	RH
127	Publications	Aging and Adult Services	RH
128	Bruce Hale's correspondence	Attorney General's Office	
133	Civil actions registers	Attorney General's Office	
134	Criminal actions registers	Attorney General's Office	
136	Inheritance tax record books	Attorney General's Office	
137	Claims committee minutes	Attorney General's Office	
142	Slip laws	Attorney General's Office	
143	Harvey H. Cluff photograph	Attorney General's Office	
145	Utah Power and Light case file	Attorney General's Office	
157	Clyde Pearce's justice division	Attorney General's Office	
158	Robert B. Hansen's administrat	Attorney General's Office	
160	Board of Pardons meeting age	Board of Pardons	
162	Supreme court hearings 1900-190	Attorney General's Office	

Logs for Classification Changes

- Text report

- Query asks for:
 - Audit log date/time range
 - Series number (aka bibliographic record id)
 - Audit log who added (aka who changed the classification/designation)
- Sort by:
 - Series number
 - Audit log date/time
 - Audit log who added
- Data includes:
 - Bibliographic level (e.g. series)
 - Series number
 - Date added
 - Who added
 - Classification/Designation
 - Classification text

Logclass Output				
	Series Level	Number	Class	Classification Text
03/27/2006	APX		FUR	
03/15/2014	RR		FUR	
#ERL#:	2		FUR	
03/27/2006	APX		FUR Social Security Number	
#ERL#:	2		FUR	
03/27/2006	APX		FUR Social Security Number	
			FUR other stuff	
#ERL#:	2		FUR	
03/27/2006	APX		FUR Social Security Number	
			FUR	
#ERL#:	2		FUR	
04/28/2006	IRB		FUR	
			FUR	
#ERL#:	2		FUR	
03/31/2006	MEV		FUR Social Security Number	
			FUR	
#ERL#:	2		FUR	
03/31/2010	MJZ		FUR	
#ERL#:	2		FUR	

Logs for Retention Changes

- PDF report
- Query asks for:
 - Audit file date/time range
 - Series number (aka bibliographic key)
 - Audit file who added (aka who changed the retention)
- Sort by:

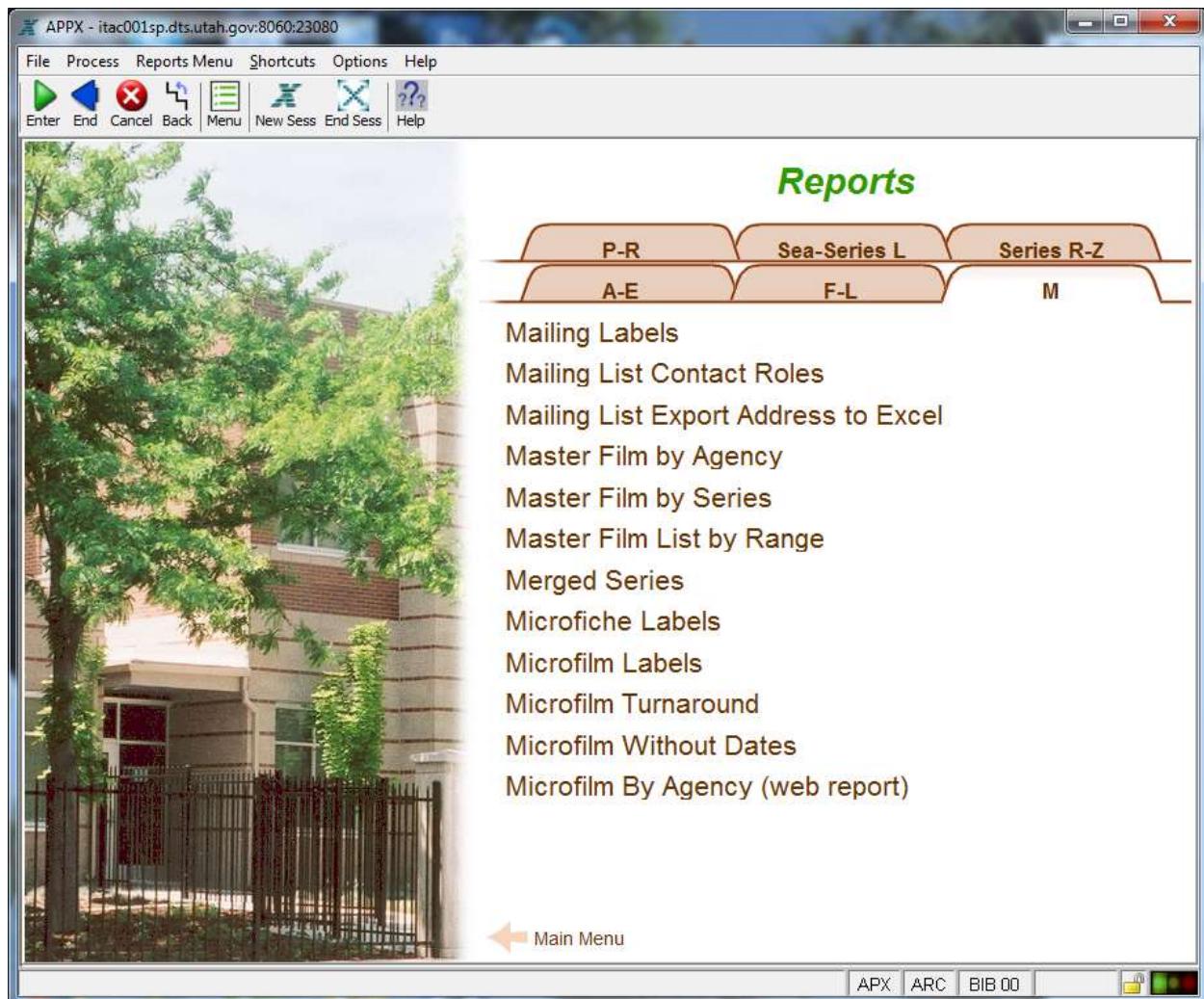
- Series number
- Format management sequence number
- Audit log date/time
- Audit log who added
- Data includes:
 - Bibliographic level (e.g. series)
 - Series number
 - Format management sequence number
 - Audit log date
 - Audit log who added
 - Retention statement

The screenshot shows a software window titled "Archives Logformat Output". The main content area displays a table of retention statements:

Level	Bibgrpc Key	Date	Who	Stamp	Add	Retention
series	9802	1	03/27/2006	APX	Paper:	Retain in State Archives permanently and then microfilm.
series	9802	2	03/27/2006	APX	Microfilm master:	Retain in State Archives permanently with authority to weed.
series	9802	3	03/27/2006	APX	Microfilm duplicate:	Retain in State Archives permanently with authority to weed.

The right side of the window features a vertical toolbar with various icons for file operations like "Export PDF", "Create PDF", "Edit PDF", "Comment", "Combine File", "File & Sign", "Send for Signature", and "Send & Track". A status bar at the bottom right indicates "Save and share files in the Document Cloud" and "Last Edit".

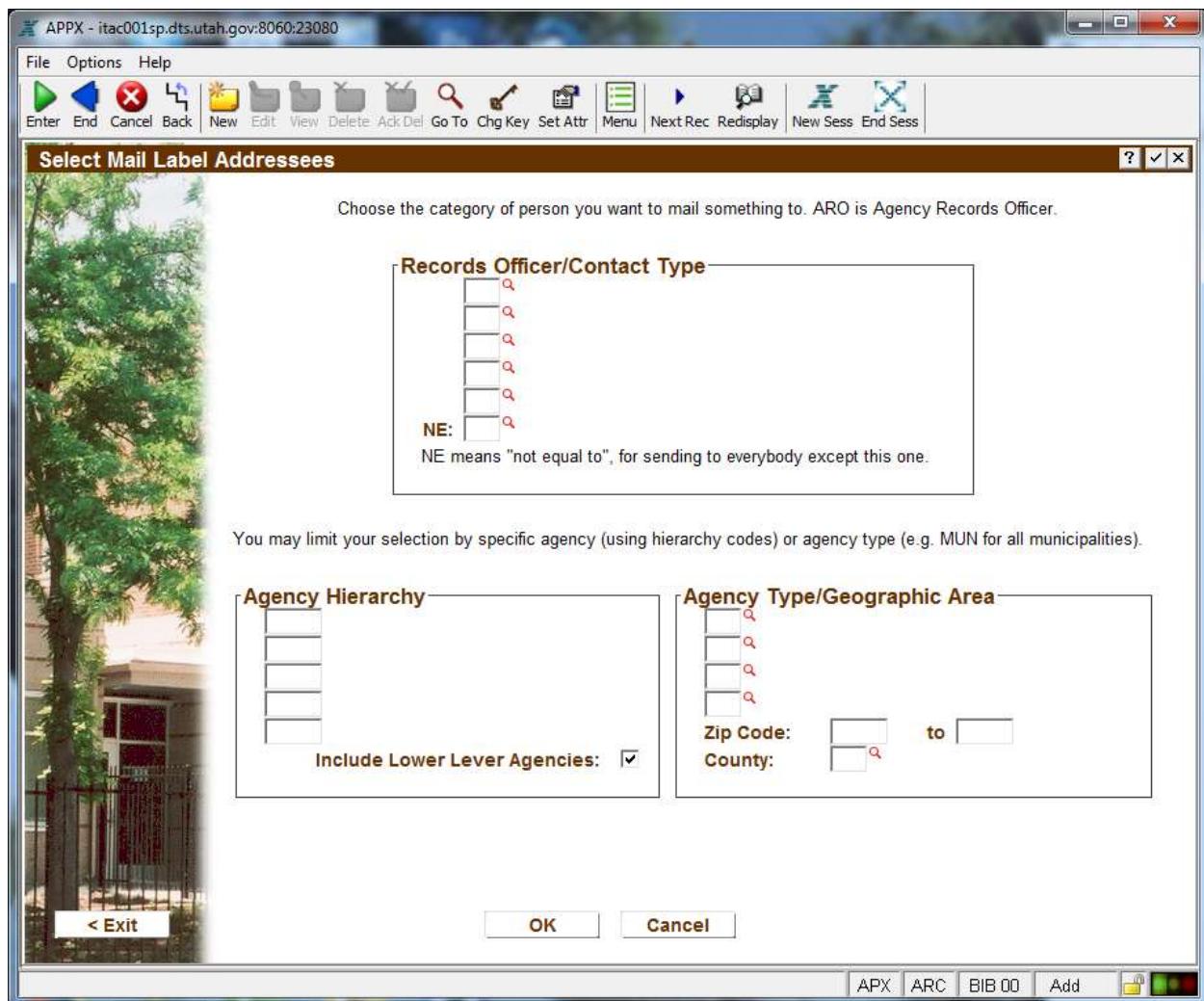
Click on the M tab of the Reports Menu.



Mailing Labels

- Mpage report
- Uses input process to query database, asking for records officer contact type, agency hierarchy, agency type, zip code range, or county.
- Additional query screen asks for:
 - Whether the Building Mail checkbox is checked (building mail is State Mail, meaning the label doesn't print out the full address)
 - City name
- Sort by:
 - Building mail yes/no
 - Entity name (aka agency short name)
 - Last name, first name
 - Zip code
 - City name
- Data includes:
 - Name of agency contact

- o Address



APX - Mailing List Contact Roles	
MRS. NICHELLE JEROMINA AGENCE EMPLOYEE 4511 S 2700 W SALT LAKE CITY UT 84116	NICHELLE JEROMINA EQUIPMENT OPERATIONS 4511 SOUTH 2700 WEST SALT LAKE CITY UT 84116
CARLOS RODRIGUEZ HUMAN RESOURCE MANAGEMENT 4511 SOUTH 2700 WEST SALT LAKE CITY UT 84116	JESSIE HILL PROGRAM DEVELOPMENT SENIOR 4511 SOUTH 2700 WEST SALT LAKE CITY UT 84116
HOMA SESESTANI TRANSFERT MANAGEMENT 2343 SOUTH 2700 WEST SALT LAKE CITY UT 84108	JILL BARTER TRANSPORTATION AERONAUTICS DIV 115 SOUTH 2400 WEST SALT LAKE CITY UT 84116
JUDIE BONELL TRANSFERT CIVIL RIGHTS 4511 SOUTH 2700 WEST 4TH FLOOR SALT LAKE CITY UT 84116 - 1223	MRS. JULIANNA FORRECK RECORDS OFFICER TRANSPORTATION CONTROLLER 4511 S 2700 W SALT LAKE CITY UT 84116
AMBER ACUTONE AGENCE EMPLOYEE TRANSFERTATION CONSTRUCTION 4511 SOUTH 2700 WEST 4511 S 2700 W	JENNIFER RYTA TRANSPORTATION CONSULTANT SERV 4511 SOUTH 2700 WEST SALT LAKE CITY UT 84116
DEBORA JOZIE TRANSFERTATION DEPARTMENT 4511 SOUTH 2700 WEST P.O. BOX 141263 SALT LAKE CITY UT 84116 - 1263	MANDY KIMMEL RECORDS OFFICER TRANSPORTATION DEPARTMENT 4511 SOUTH 2700 WEST AND FL. SALT LAKE CITY UT 84116
GAYNELL DARE RECORDS OFFICER TRANSFERTATION DEPARTMENT 4511 4511 SOUTH 2700 WEST	JIMMY HOLMEIS TRANSPORTATION INTERNAL AUDIT 4511 SOUTH 2700 WEST SALT LAKE CITY UT 84116

Mailing List Contact Roles

- PDF report
- Query asks for:
 - Role description of records officer
 - Date last updated
 - Mailing list key
- Sort by:
 - Mailing list key
- Data includes:
 - Role description
 - Mailing list key
 - Last name
 - First name

Archives
Mailrole Output

Role Description	Key	First Name	Last Name
State Treasurer	3	David	Damschen
For record center: Contact for destruction.	10	Anne	McNally
Legal Assistant, Mediator, Docket / Document Contr	28	Dennis	Miller
Hearing Officer and Records Officer	29	Benjamin	Jensen
Division GRAMA persons report to me weekly and I c	43	Laurie	Leib
My role is archiving/retention of records.	46	Marianne	Booth
GRAMA Coordinator	47	Terry	Montgomery
Finance Director/Records Officer	54	Michael	Jones
Office of Education	57	David	Rodermack
Office of Education	58	Ella	Adkins
Office of Education/Schools for Deaf and Blind	59	Brian	Gough
Department of Administrative Services, i&MDepartme	60	Larens	Nyas
Human Resources for Dept. of Workforce Services	61	Patricia	Barrett
Board of Education	62	David	Rodermack
Utah Department of Corrections	63	Jennifer	Wilde
Department of Human Resource Management	64	John	Golem
HR Officer for the Department of Public Safety	65	Bryan	Embley

Mailing List Export Address to Excel

- Spreadsheet report
- Query asks for:
 - Mailing list key range
 - Zip code range
 - Mailing category code (e.g. ARO, CAO, etc.)
 - Agency type
 - County code
 - Analyst assigned to agency
- Sort by:
 - Last name
 - First name
 - Mailing list key
- Data includes:
 - Mailing list key
 - Last name
 - First name
 - Middle name
 - Address line 1
 - Address line 2
 - City
 - State
 - Zip code
 - Unknown numeric field
 - Phone area code
 - Phone number prefix (3 digits)

- Phone number (4 digits)
- Phone extension
- Email
- Agency name associated with Building Mail value

mailist.csv - Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
98	20548	Aagard	Justin			PO Box 87 80 South 2 Moroni	UT		84646		435	436	8911	moronicit:Moroni (Uts			
97	3294	Abdullah	Patricia			75 N Main St	Heber City	UT	84032		435	654	6330	pabdullah@Heber City (
98	20542	Abercrom Robert				2381 E. 10th Rt. 2, Box	Ballard	UT	84066		435	722	3393	ballard1@Ballard (Uta			
99	20552	Adair	Kent			197 North Main Street	Monticello	UT	84535		435	587	2273	kent@mo Monticello			
100	20504	Adair	Leah			Excelsior 124 E Erda Way	Tooele	UT	84074		435	862	3062	ladair@ex Excelsior Ad			
101	20637	Adair	Melanie			3430 East Danish Road	Cottonwood	UT	84093		801	942	9620	adair@mo Metropolis			
102	20370	Adamic	Julie			125 North 100 East	Pleasant	UT	84062		801	796	5646	julie@joh John Hancock			
103	3280	Adams	Anthony			Wasatch F-804 West	Midvale	UT	84047		385	468	6332	aadams@ Wasatch Frit			
104	20788	Adams	Bryan			2010 South 2760 West	Salt Lake	UT	84104		801	360	4451	bryanadar@Department			
105	1405	Adams	Charne			2920 W 14010.5	Bluffdale	UT	84085		801	302	9579				
106	3176	Adams	Jaci			265 S Fair P O Box 96	Price	UT	84501		435	637	6351	101 jaciprwid@Price River			
107	2830	Adams	Jacky Lynn			5272 S College Dr Ste Murray	Utah	UT	84107		801	281	1200	jackyadan@Attorney G			
108	20678	Adams	Janet			75 South 400 West	Logan	UT	84321		435	753	8811	j.adams@ Bear River C			
109	662	Adams	Jon E			PO Box 923	American	UT	84003		801	756	5231	jona@tsi Timpanogos			
110	1862	Adams	Laurie			5400 W. Civic Center	Highland	UT	84003		801	772	4521	laurie@hi Lone Peak E			
111	14	Adams	Lisa			5120 State Office Bul	Salt Lake	UT	84114		801	538	9641	LISAADAMS@utah.gov			
112	31	Adams	Nadene			160 East 300 South	Salt Lake	UT	84111		801	530	8613	n nadams@ Department			
113	1345	Adamson	Cathie			12892 South Pony Ex Draper	UT		84020					cadamson@American P			
114	20662	Adamson	David			166 West Southwell Street	Ogden	UT	84404		801	781	545	deadams@ Department			
115	58	Adkins	Etta			250 East 500 South	Salt Lake	UT	84111		801	538	7560	ETTA.ADK Department			
116	1104	Adkins	Marlowe C			PO Box 9	Richmond	UT	84333		435	258	2092	richmondi@Richmond (
117	854	Afuvai	Lindsay			1896 North 1800 West	Farr West	UT	84404		801	731	4187	lindsay@f Farr West (
118	1175	Ahlstrom	Erika J			1600 E South Weber	South We	UT	84405		801	479	3177	eahlstrom@southwest			
119	926	Ahlstrom	Gail			PO Box 26 7309 East	Huntsville	UT	84317		801	745	3420	gailahlstrom@Huntsville (
120	3668	Albrecht	Jake			P.O. Box 3175 East 300 North	Glenwood	UT	84730		435	896	260	glenwood@Glenwood (
121	226	Albrecht	Stan L			1400 Old Main Hill	Logan	UT	84322	1400	435	797	1162	stan.albre Utah State (
122	1967	Aldrich	Alycia			300 S. Rio Grande St	Salt Lake	UT	84101		801	245	7226	saldrich@ Department			
123	20352	Alejandro	Eulogio			4956 West 3500 South	West Valli	UT			801	305	1450	eulogio.al Esperanza E			
124	969	Alger	Alison			153 N 100 E	Lehi	UT	84043		801	768	7100	2257 aalger@le Lehi (Utah)			
125	3076	Alhasoun	Rebecca W			3575 S Market Street	West Valli	UT	84119		801	955	3624	rebecca.al West Valley			
126	3000	Althamer	Yvonne			1610 S Franklin	Provo	UT	84636		801	873	8200	althamer@provo Com (UT)			

Master Film by Agency

- PDF report
- Query asks for:
 - Agency number
 - Agency type
 - Agency hierarchy levels 1 through 5
- No sort, default is by agency, thereunder series number, thereunder accession number
- Data includes:
 - Agency name
 - Agency number
 - Series number
 - Series title
 - Film accession number
 - Format (fiche or film)

- Date range of film
- Index range of film

Archives
Master film list by Agency

Page: 1
06/22/16 10:35
APX

Aging and Adult Services (2)

Accession -----Date Range----- Index Range-----

Series: 127 Publications

3302	FCH	1970 01 03 - 1976 03 30	1970	- 1976
------	-----	-------------------------	------	--------

Series: 132 Policy and procedures manuals

3304	FCH	1976 01 03 - 1976 12 31	manual	-
------	-----	-------------------------	--------	---

Series: 10898 Accessioned publications [1965-1977]

3303	FCH	1965 01 30 - 1976 12 31	1965	- 1976
------	-----	-------------------------	------	--------

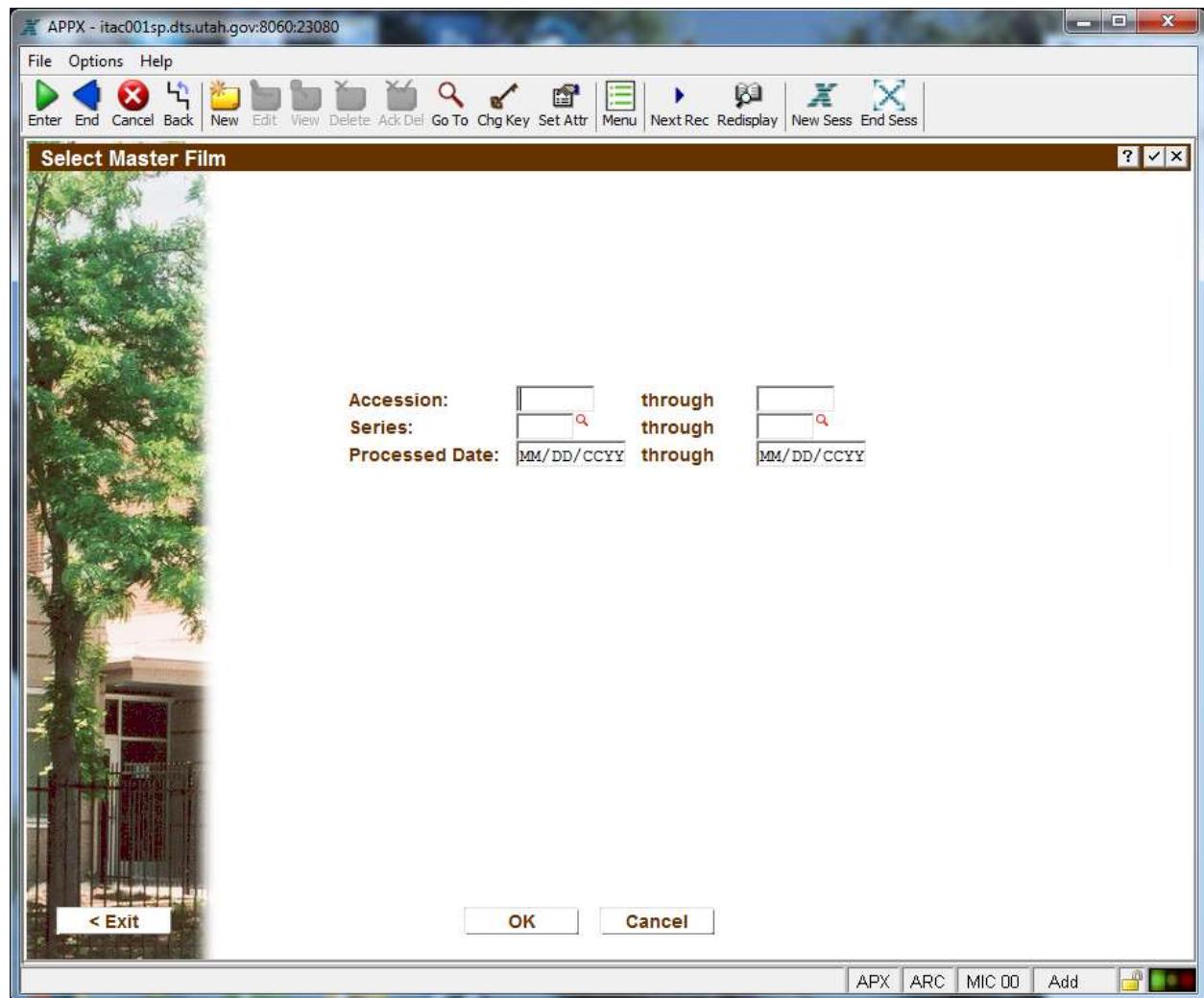
Master Film by Series

- Text report
- Query asks for:
 - Series number range
 - Accession number range
- Sort by:
 - Series number
 - From year
 - Accession number
 - Index range
- Data includes:
 - Series number
 - Total format management retention time unit
 - Roll number
 - Accession number
 - Format
 - Whether deaccessioned
 - Date range (from, through)
 - Index range (from, through)
 - Reel number

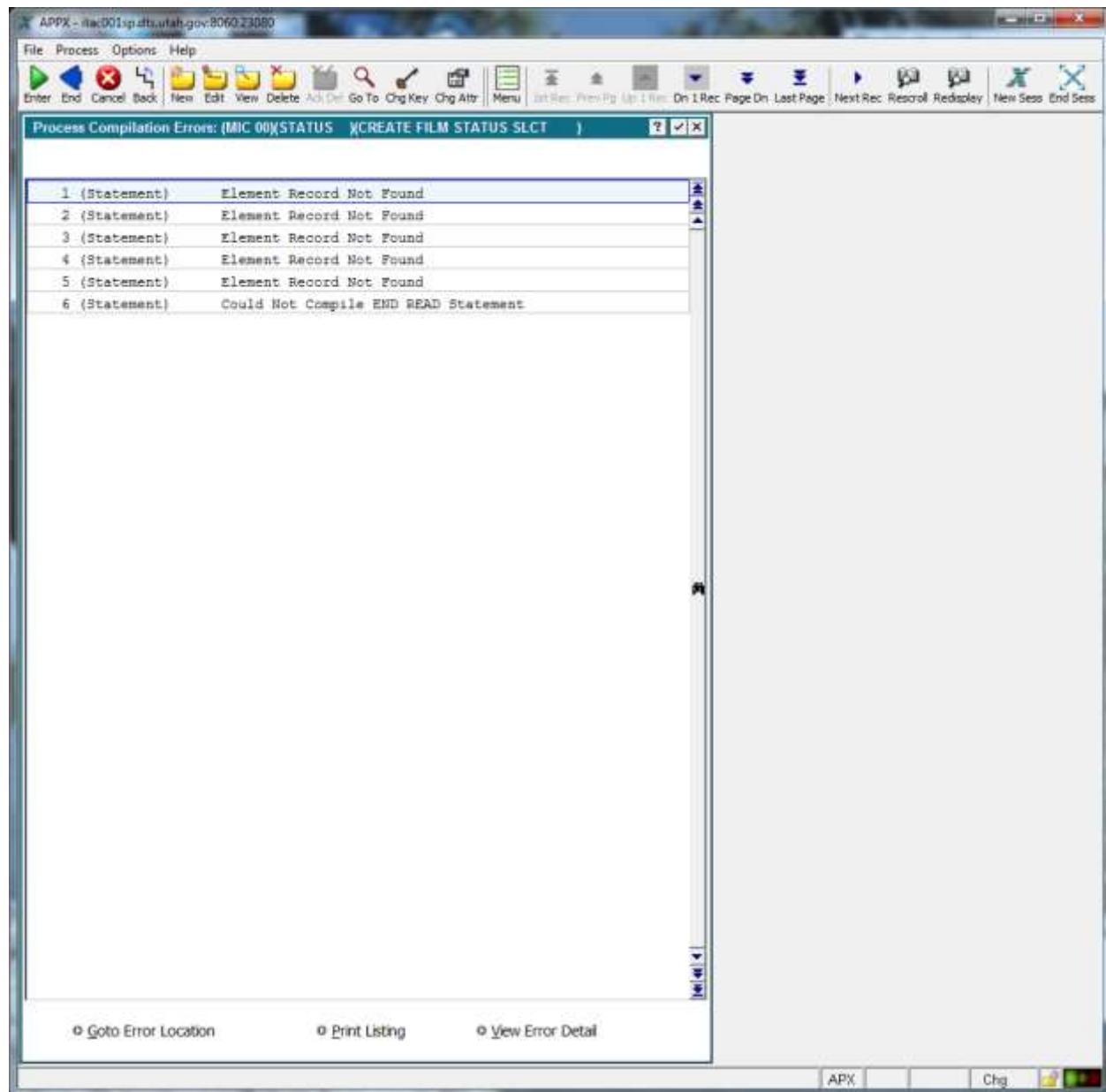
Master Film List by Range						
Series	Roll	Accession	First	Last	Accession	Index
1471						
Retention: 0 858						
1471.1	45794	NCR	V	1800	01-13	00460
				thru		
				1800	02-18	
1471.2	45795	NCR	V	1800	01-13	12517
				thru		
				1801	01-13	
1471.3	45796	NCR	V	1852	01-13	18100
				thru		
				1852	12-33	
1471.209	110212	NCR	H	1815	02-18	003001
				thru		
				1815	06-13	003949
1471.210	110218	NCR	H	1815	07-13	003717
				thru		
				1815	11-28	003609
1471.210	110218	NCR	H	1815	06-19	003970
				thru		
				1815	08-14	004048
1471.211	110213	NCR	H	1815	08-14	004046
				thru		
				1815	11-13	004130
1471.212	110214	NCR	H	1815	11-13	004131
				thru		
				1816	01-18	004126
1471.213	110212	NCR	H	1816	01-16	Case 4197
				thru		
				1816	06-18	Case 4200
1471.214	110213	NCR	H	1816	11-12	003610

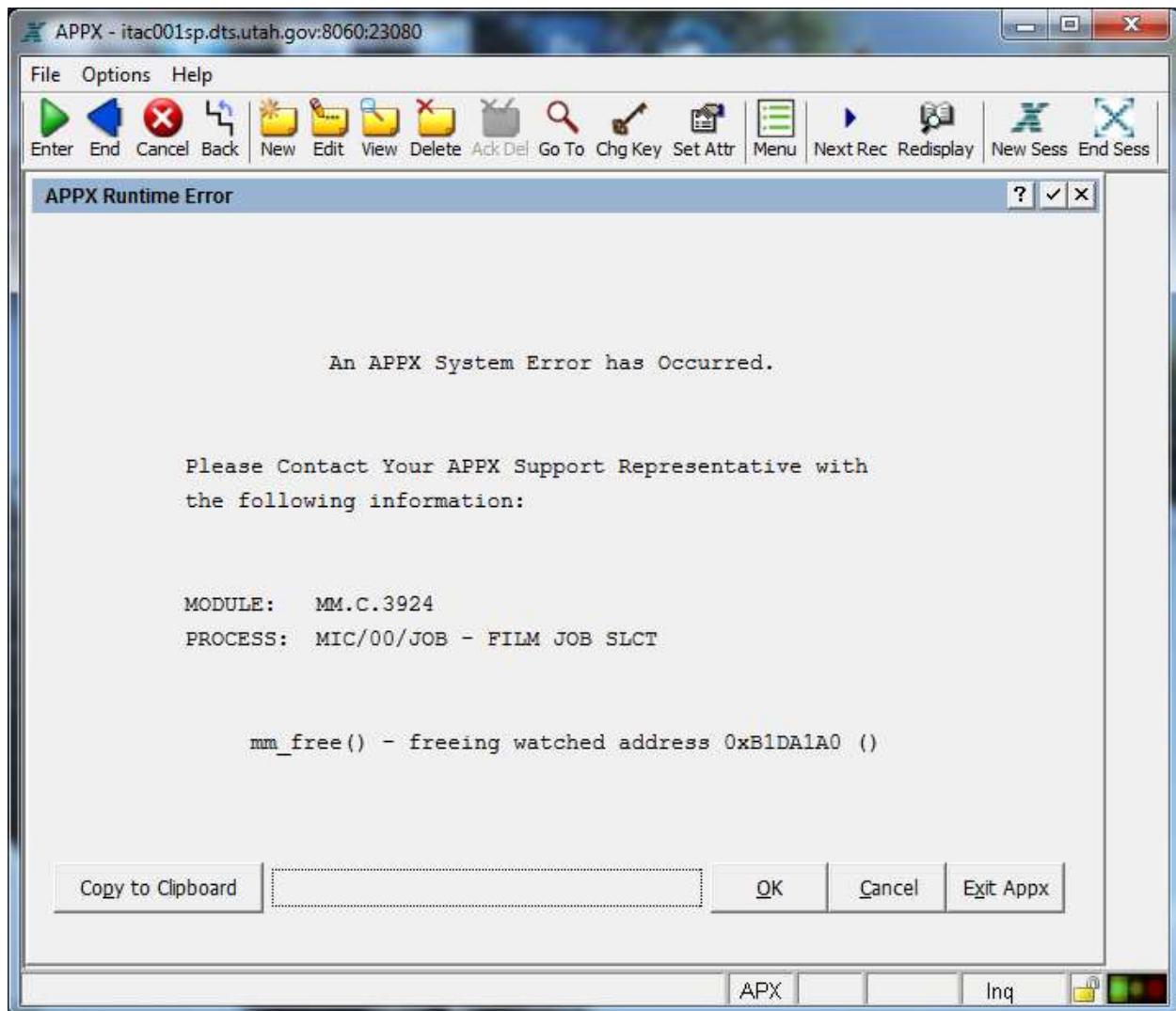
Master Film List by Range

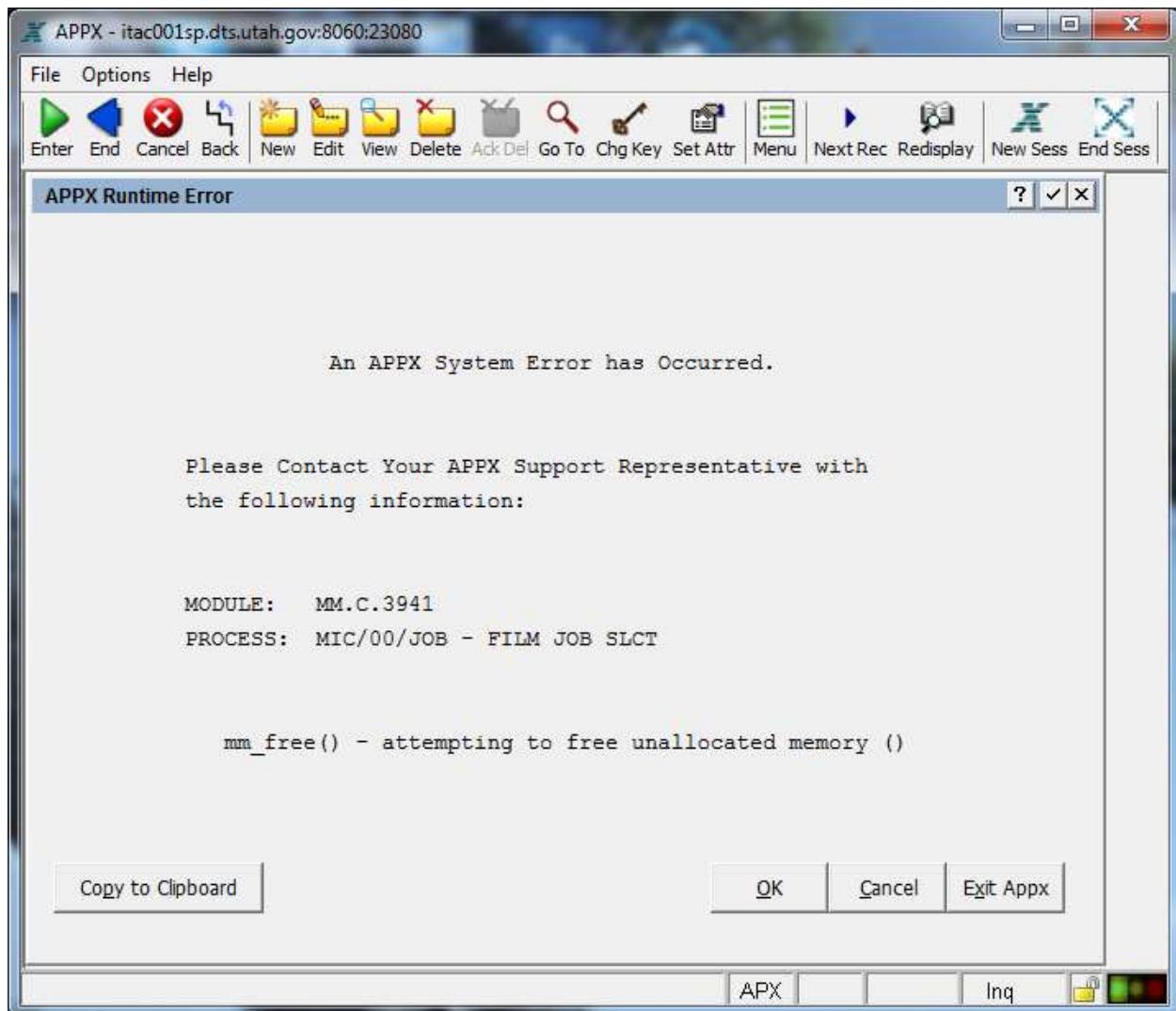
- Uses input process for query, asking for accession number range, series number range, or processed date range



[Bug report: running report results in an error of elements not found, followed by a c-assert)







Merged Series

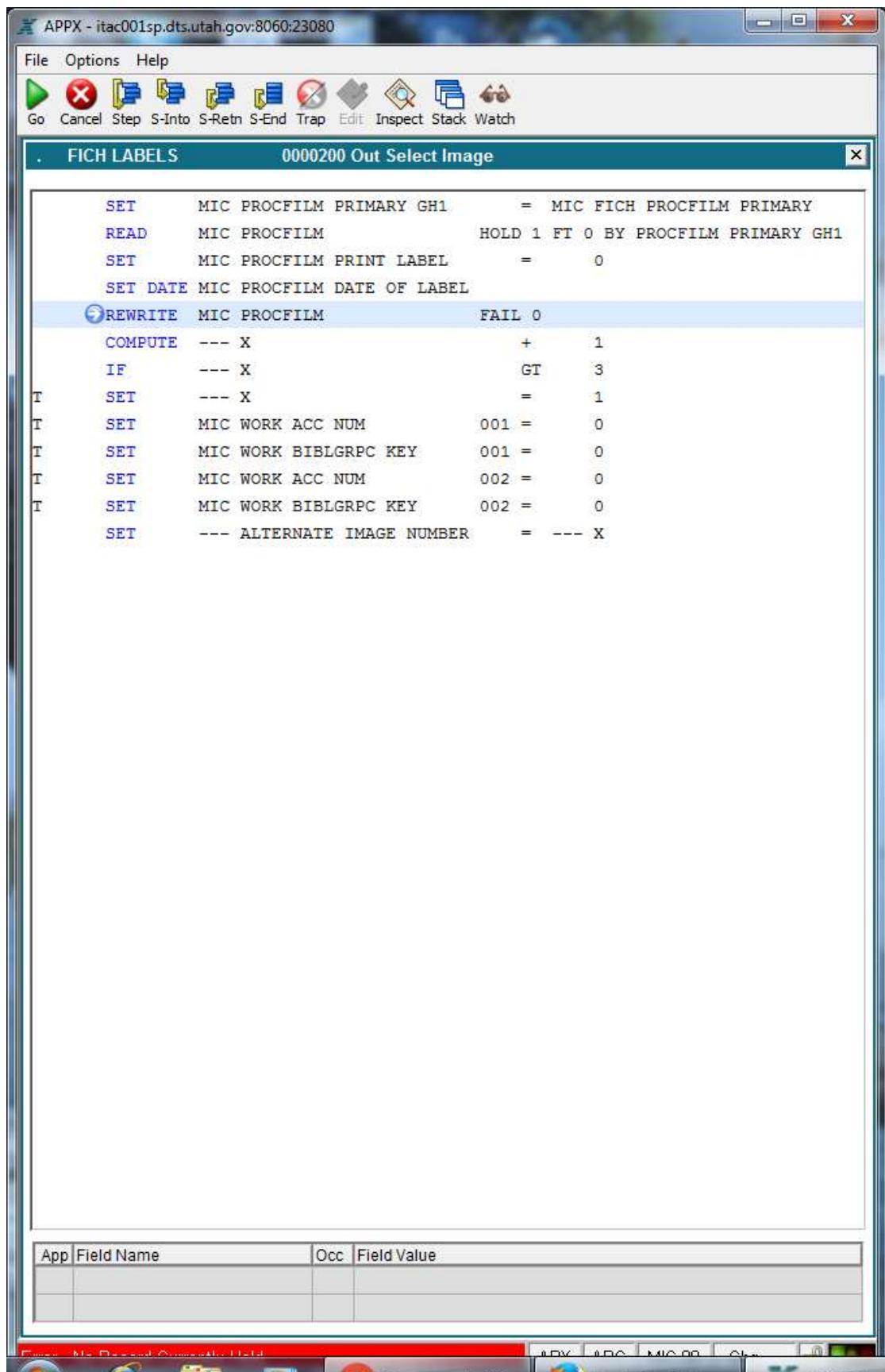
- Text report
- Query asks for:
 - Date merged range
 - Agency number
- Sort by:
 - Date merged
 - Merged series number
- Data includes:
 - Merged series number
 - Series title
 - Agency number
 - Date merged
 - Series merged into

APX - Mpage Report					
File Process Options Help					
New					
Page 1 of 2 Merged PRINT					
Archives					
04/22/2016 11:19 06:02			APX Page:	1	
Mergeid	Date	Merged			
Merged Title	Agency	Merge#	Info		
03618 Utah official roster	LL	1130			
7300		11 03/18/1980	3		
I Flagmail files	LL	03/03/1980	10194		
Error - Bibliographic file not on file					
8578 HRE AGAIN (UNABLE TO DELETE)	LL	03/03/1980	3		
7173 HRE AGAIN (UNABLE TO DELETE)	LL	03/03/1980	3		
8527 HRE AGAIN (unable to delete)	LL	03/03/1980	3		
8551 What is wrong with this	LL	03/03/1980	3		
13184 HRE AGAIN	LL	03/03/1980	3		
28882 HRE AGAIN (UNABLE TO DELETE)	LL	03/03/1980	3		
93376 HRE AGAIN (UNABLE TO DELETE)	LL	03/03/1980	3		
93377 HRE AGAIN (UNABLE TO DELETE)	LL	03/03/1980	3		
93388 HRE AGAIN (UNABLE TO DELETE)	LL	03/03/1980	3		
93389 HRE AGAIN (unable to delete)	LL	03/03/1980	3		
93395 HRE AGAIN (unable to delete)	LL	03/03/1980	3		
84358 Utah Agency Authority listing	LL	03/03/1980	3		
851 Statute public law	LL	01/18/1980	367		
Error - Bibliographic file not on file					
11544 Trade marks and Service-marks names	LL	01/18/1980	367		
Error - Bibliographic file not on file					
11583 Uniform reciprocal enforcement of E	LL	01/18/1980	84900		
Error - Bibliographic file not on file					
11588 Military Department record group re	LL	01/18/1980	84900		
Error - Bibliographic file not on file					
11573 Affirmative action plan	LL	01/18/1980	11964		
Error - Bibliographic file not on file					
54988 Veterans buried in Utah	LL	01/18/1980	11573		
Error - Bibliographic file not on file					
8852 Legislative bill duplicates	LL	07/20/1980	7279		
13512 Alice's surprise	LL	03/18/1995	3		
14345 I am frustrated	LL	03/18/1995	3		
14342 I am still mad.	LL	03/18/1995	3		
14153 Frustration	LL	03/18/1995	3		
987 Publications	LL	12/17/1995	TOTL		
1867 Publications	LL	12/17/1995	987		

Microfiche Labels

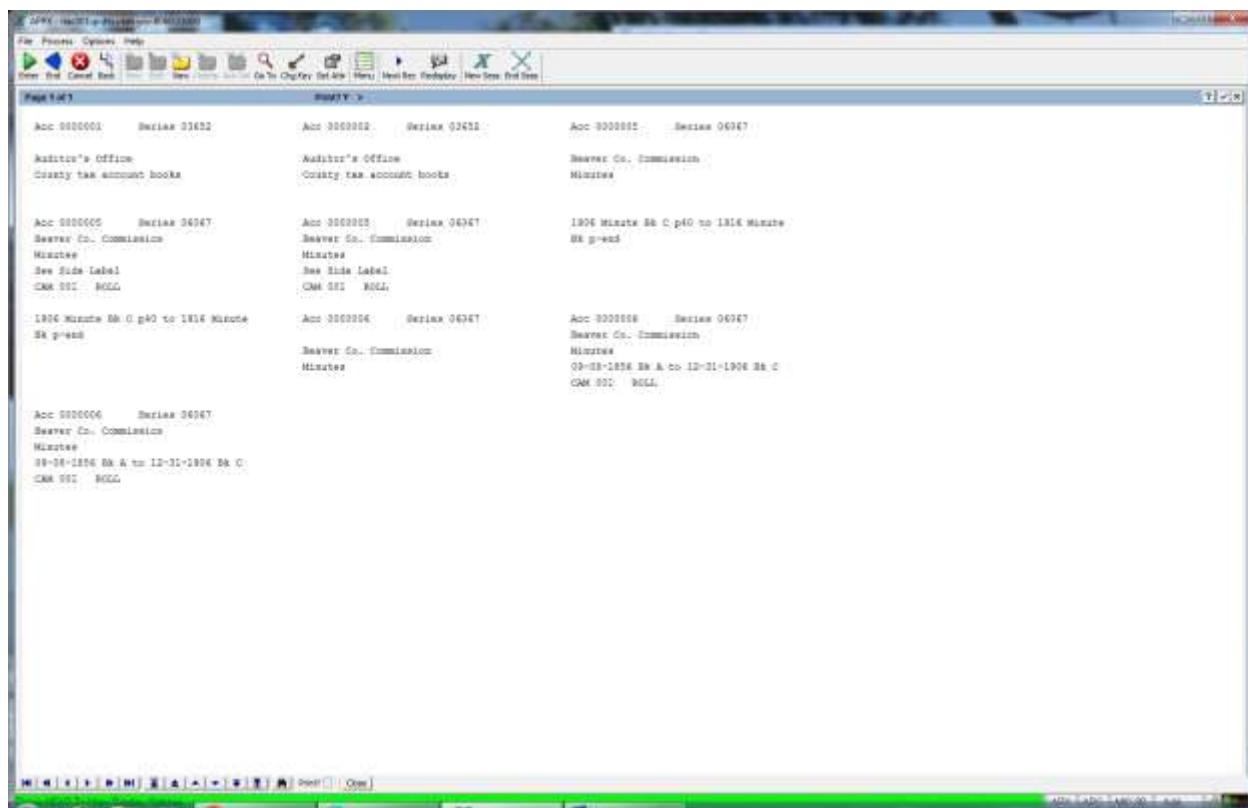
- Mpage report

[Bug report: results in error No Record Currently Held, although fiche were selected in Film Input Lookup prior to running the report]



Microfilm Labels

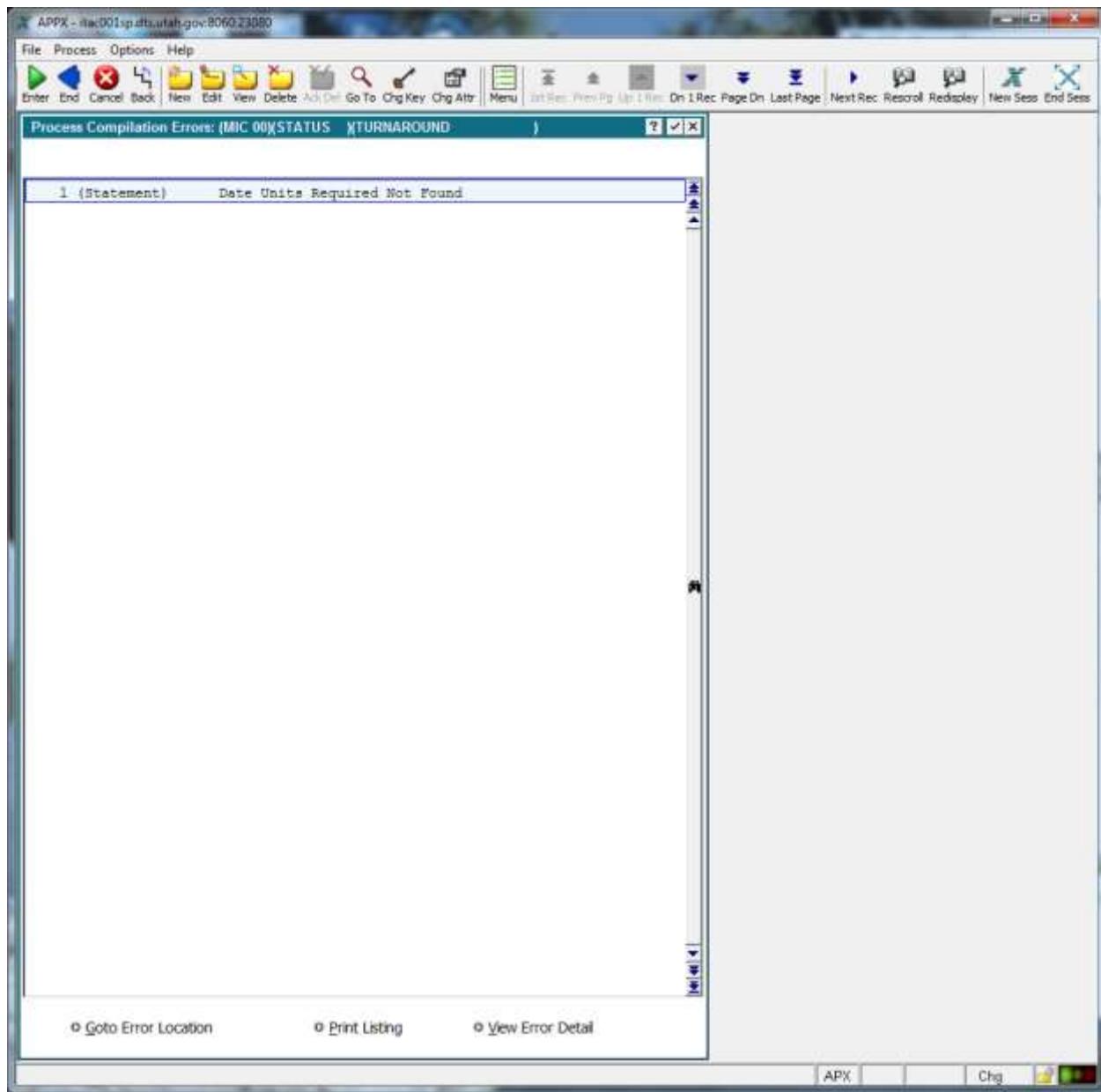
- Mpage report
- Query is the Film Input Lookup process, where users select the film they want labels for.
- No sort, default is by accession number
- Data includes:
 - Accession number
 - Series number
 - Agency short name
 - Series title
 - Index range
 - Camera number
 - Roll number



Microfilm Turnaround

- Text report
- Query in an input process, asking for the date completed [Bug report: the input process reflect the old blue design instead of the brown]

[Bug report: running the report results in an error of date units required not found]

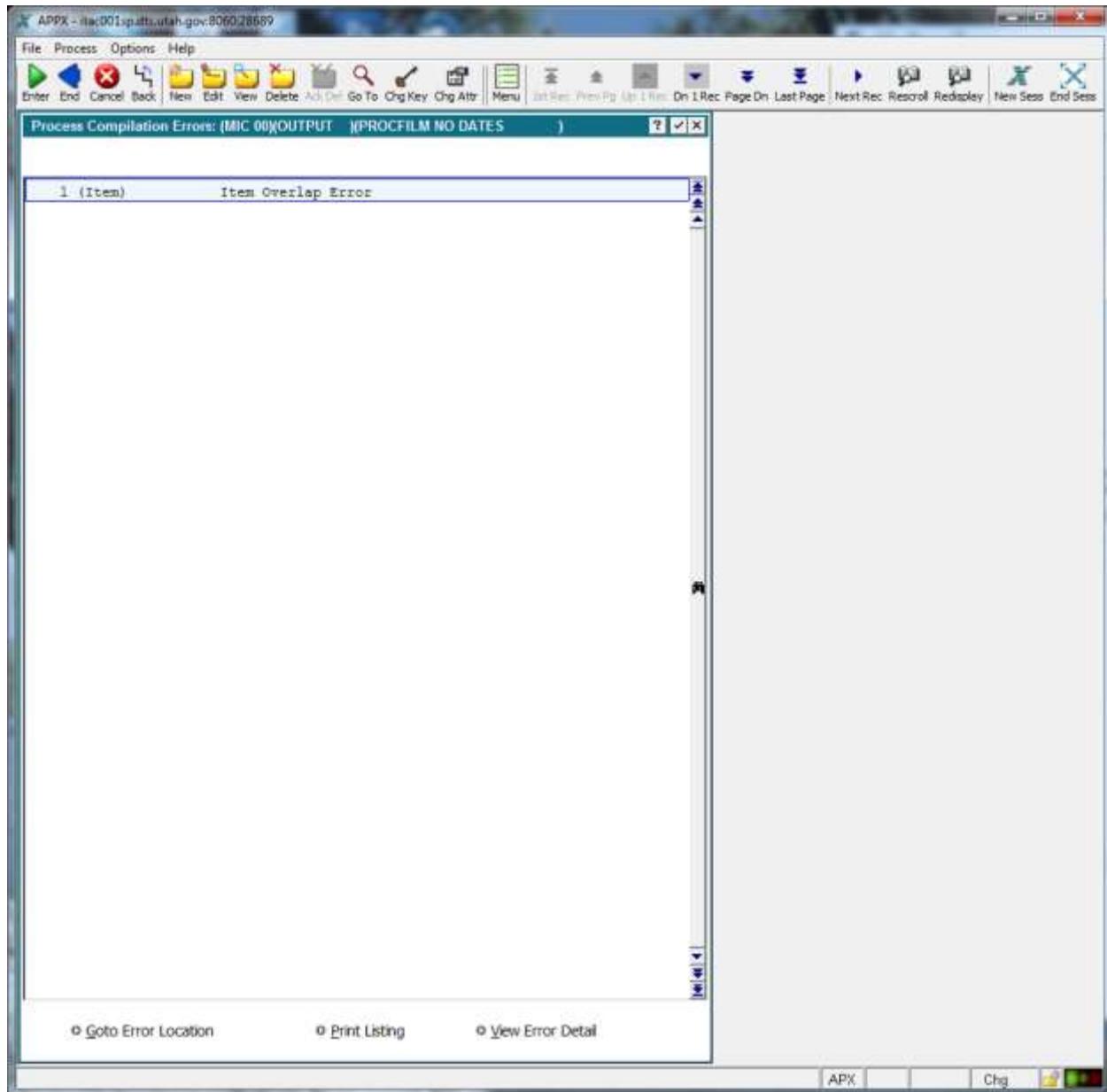


Microfilm Without Dates

- Text report
- Query asks for:
 - Year range
 - Accession number
 - Format (defaults to MCR)
 - Whether deaccessioned
 - Day range
 - Month range
- Sort by:
 - Accession number

- Series number

[Bug report: results in an error of Item Overlap]



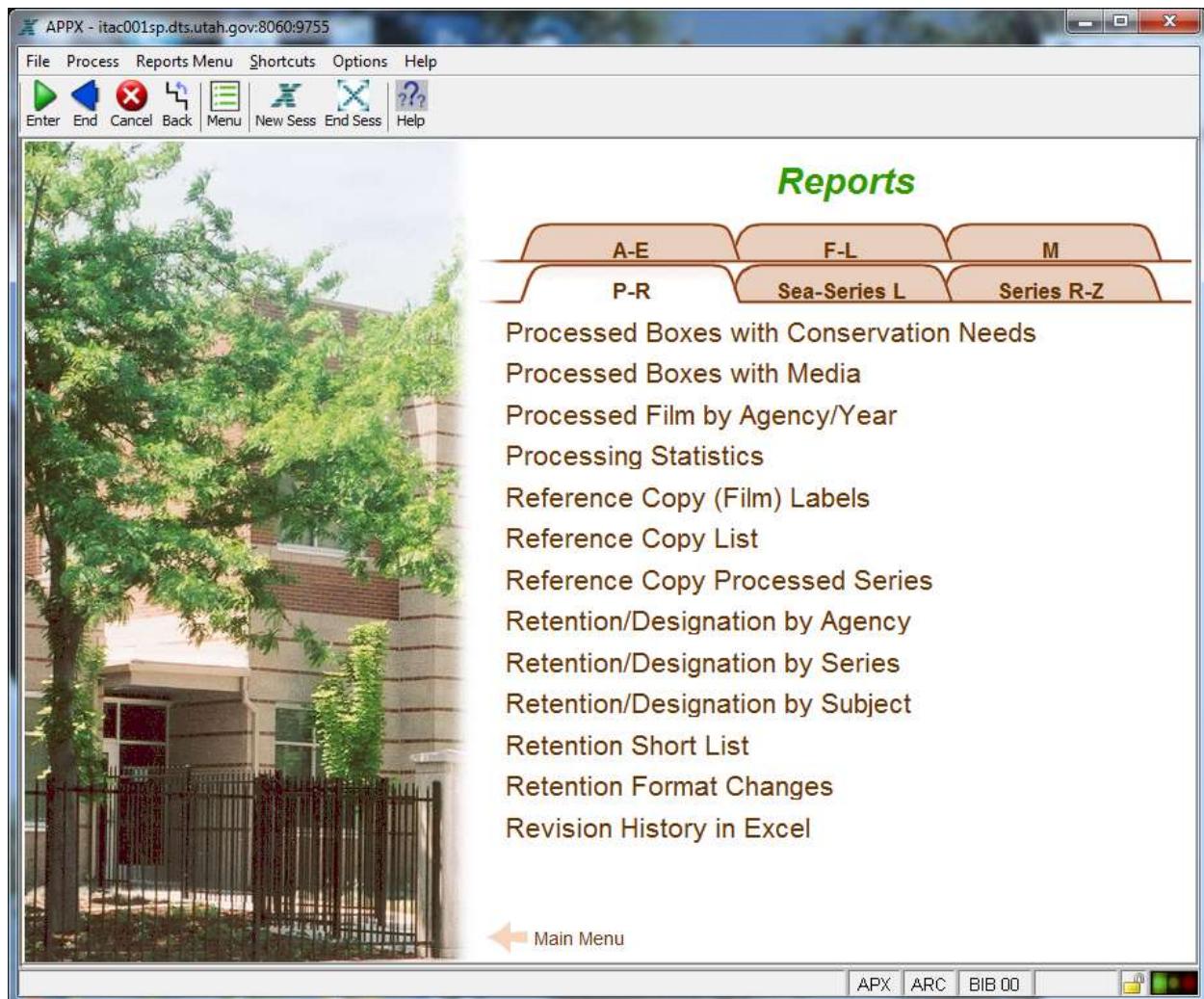
[Microfilm By Agency \(web report\)](#)

- PDF report
- Query asks for agency number
- No sort, defaults by series number, thereunder by accession number
- Data includes:
 - Agency name
 - Series number
 - Series title

- Accession number
 - Date range
 - Index range

Governor (2009- : Herbert)							
Series	182	Messages to the legislature					
Accession #:	20821	Dates: File Ranges:	Jan 05 1878 -	Jan 05 1896			
Accession #:	20823	Dates: File Ranges:	Sep 22 1851 - Brigham Young - George L Woos	Jan 13 1874			
Accession #:	20825	Dates: File Ranges:	Jan 05 1896 -	Jan 05 1945			
Accession #:	20826	Dates: File Ranges:	Jan 05 1945 -	Jan 05 1967			
Accession #:	20827	Dates: File Ranges:	Jan 05 1966 -	Jan 05 1977			
Series	183	Administrative records					
Accession #:	20902	Dates: File Ranges:	Jan 01 1913 - scrapbook -	Dec 31 1914			

Click on the P-R tab of the Reports menu.



Processed Boxes with Conservation Needs

- PDF report
- Query asks for:
 - Needs filming
 - Needs scanning
 - Needs flattening
 - Needs repairing
 - Needs cleaning
 - Needs reformatting
- Sort by:
 - Series number (aka bibliographic record id)
 - Processed container sequence number
 - Container type
 - Container numeric value
 - Container alpha value
 - Box barcode
- Data includes:

- Series number
- Processed container sequence number
- Conservation action needed
- Container type
- Container number
- Box barcode

The screenshot shows a software application window with a toolbar at the top. The main content area displays four entries, each consisting of a label (e.g., 'Bibliographic series'), a value (e.g., '32 -1'), and a status message ('Requires Conservation Action'). Below each entry are three fields: 'Container:', 'Number:', and 'Barcode:', followed by their respective values. To the right of the main content is a sidebar with several buttons and dropdown menus. One button is labeled 'Export PDF'. Other buttons include 'Create PDF', 'Edit PDF', 'Comment', 'Check File', 'Fill & Sign', 'Send for Signature', and 'Send by Email'. A dropdown menu under 'Document' is set to 'Microsoft Word (Normal)'. A note at the bottom of the sidebar says 'Show and edit files in the Document Cloud'.

Bibliographic	series	32 -1	Requires Conservation Action:
Container:	Box		
Number:	1		
Barcode:	%00179558		
Bibliographic	series	63 -1	Requires Conservation Action:
Container:			
Number:	1		
Barcode:	%00121407		
Bibliographic	series	63 -2	Requires Conservation Action:
Container:	box		
Number:	2		
Barcode:	%00121408		
Bibliographic	series	165 -1	Requires Conservation Action:
Container:	box		

Processed Boxes with Media

- PDF report
- Query asks for:
 - Photos
 - Slides
 - Negatives
 - VHS video
 - Beta video
 - Movie film
 - Filmstrips
 - Audio tapes
 - Audographs
 - Magnetic tape
 - Floppy disks
 - CD
 - DVD
 - Zip disks
- Sort by:
 - Series number (aka bibliographic record id)

- Processed container sequence number
- Container type
- Container numeric value
- Container alpha value
- Box barcode
- Data includes:
 - Series number
 - Processed container sequence number
 - Media type in container
 - Container type
 - Container number
 - Box barcode

Bibliographic:	series	776 -1	Contains Media:
Container:	box		PHOTOS
Number:	1		
Barcode:	%00104314		
Bibliographic:	series	4101 -1	Contains Media:
Container:	box		PHOTOS
Number:	1		
Barcode:	%00179234		
Bibliographic:	series	5610 -1	Contains Media:
Container:	box		PHOTOS
Number:	1		
Barcode:	%00067020		
Bibliographic:	series	11894 -1	Contains Media:
Container:	box		PHOTOS

Processed Film by Agency/Year

- Text report
- Query asks for year
- No sort, defaults alphabetical by agency short name
- Data includes:
 - Agency short name
 - Number of film rolls processed

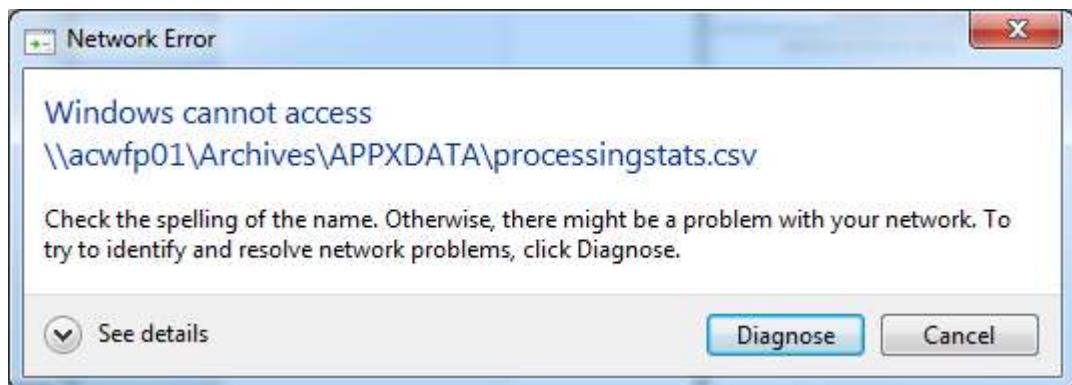
The screenshot shows a Microsoft Access application window. The title bar reads "APX - Processed File By Agency By Fiscal Year". The menu bar includes "File", "Process", "Options", and "Help". Below the menu is a toolbar with icons for "New", "Open", "Save", "Print", "Find", "Copy", "Paste", "Delete", "Insert", "Format", "Search", "Sort", "Filter", "Help", "Help Contents", "Index", "New Key Set Area", "New Key Field Area", "New Sheet", and "New Item". The main area displays a table with two columns: "Agency/Title" and "ARX Pages". The data is as follows:

Agency/Title	ARX Pages
06/22/2016 15:52:30.43	1
Archives and Records Service	3
Board of Pardons and Parole	1
Benton Co. Recorder	26
Benton Co. Treasurer	1
Cache Co. Recorder	48
Corporations	3
Davis Co. Building Inspector	6
Davis Co. Clerk	6
Davis Co. Personnel	6
Davis Co. Recorder	138
Davis Co. Sheriff	33
Distr. Court 3rd Salt Lake Co.	3
Distr. Court 8th Sanpete Co.	16
District Court (Judi)	1
Driver's License Records Bureau	1
Duchesne Co. Commission	1
Duchesne Co. Recorder	128
Duchesne Co. Treasurer	22
Eddy Co. Recorder	8

Processing Statistics

- Spreadsheet report
- Query asks for:
 - Series processed date range
 - Series processed by whom
- Sort by:
 - Series number
 - Series title
 - Series processed by
 - Series processed when
- Data includes:
 - Series number
 - Series title
 - Agency long name
 - Cubic feet
 - Number of reels
 - Processed by
 - Processed date

[Bug report: the server location needs to be updated.]

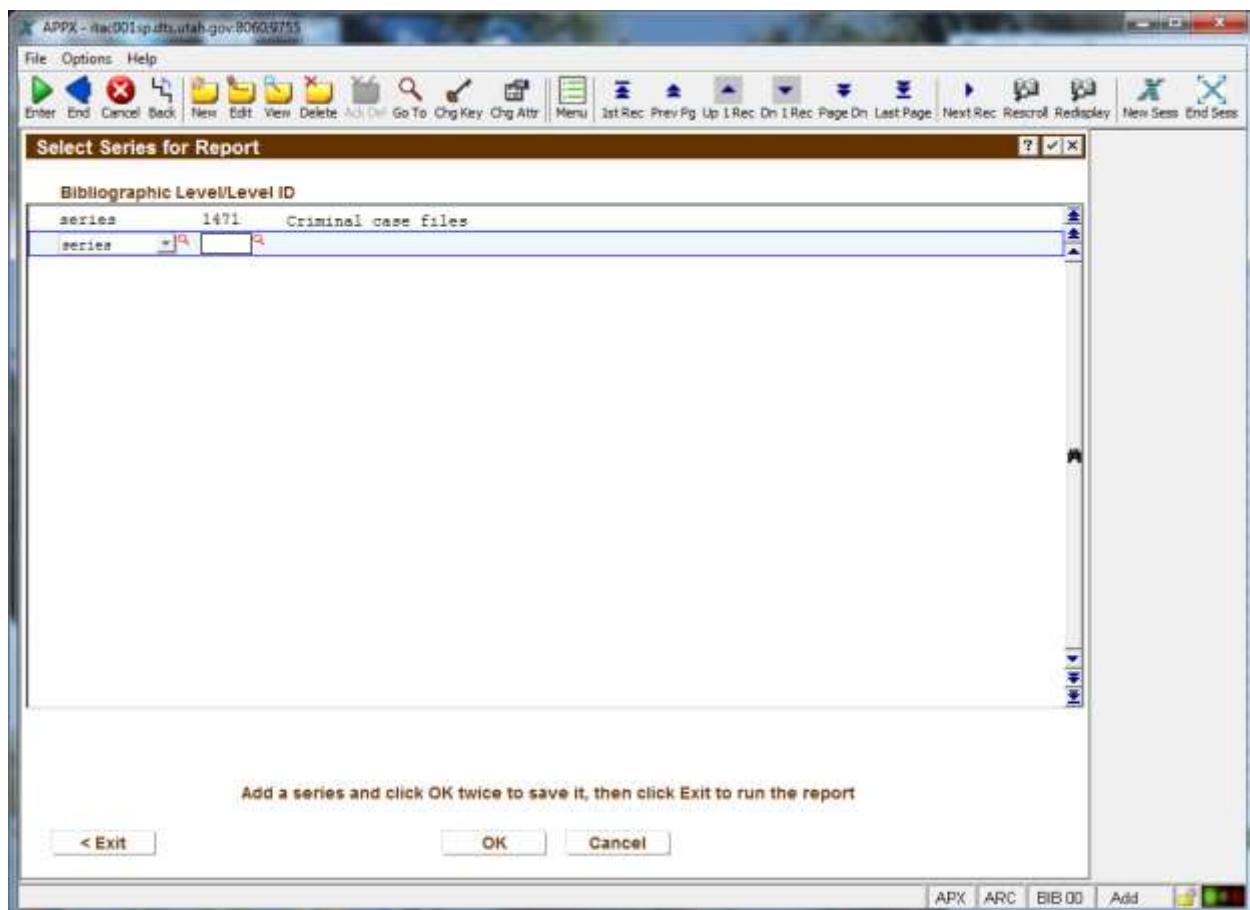


processingstats.csv - Excel

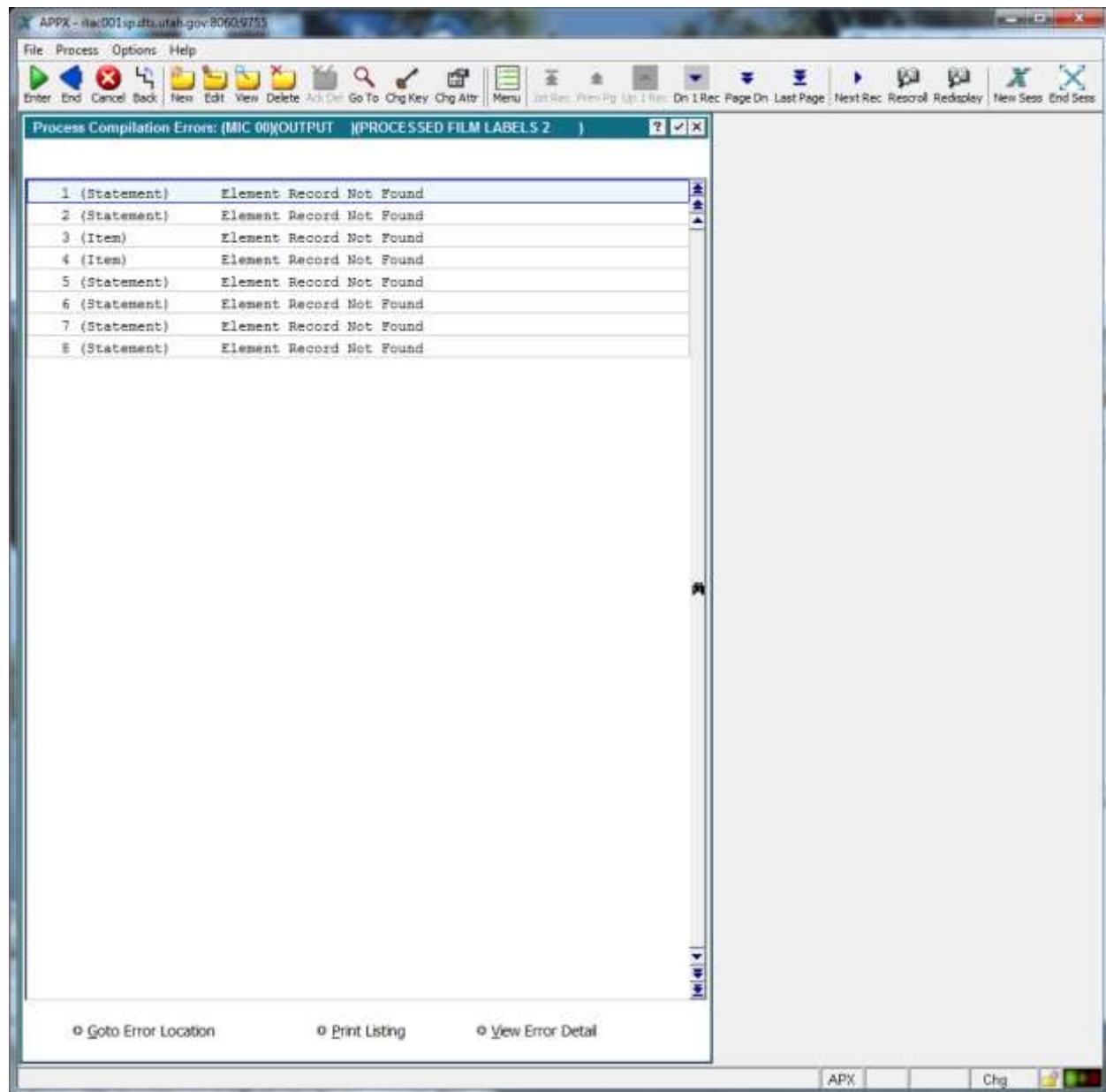
	A1	Series Number	Series Title	Agency Name	Cubic Fee	Reels	Processed	Processed When
1	968	Federally funded highway	Road Commission		0	0	JEK	Apr-15
2	3529	Juror and witness fee book	District Court (Third District : Tooele)		0.5	0	ABB	Mar-16
3	4031	Criminal case files	District Court (Seventh District : Cache)		0	37	JEK	Feb-15
4	4640	Probate case files	District Court (Seventh District : Cache)		0	166	JEK	Feb-15
5	4650	Criminal case files	District Court (Second District : Davis)		0	0	JEK	Jan-15
6	4651	Civil case files	District Court (Second District : Davis)		0	62	JEK	Jan-15
7	4654	Probate case files	District Court (Second District : Davis)		0	15	JEK	Jan-15
8	5282	Dentistry and Optometry	B Weber County (Utah). County Clerk		0.5	0	ABB	Jun-16
9	5285	School system records	Weber County (Utah). County Comm		0.35	0	ABB	May-16
10	9669	Council minutes	Levan (Utah)		0.7	1	ABB	Sep-15
11	11183	City Council minutes	Mona (Utah)		2.9	2	ABB	Jan-15
12	11860	Council minutes	Farmington (Utah)		0	42	ABB	Feb-16
13	12072	Council minutes	Fillmore (Utah)		0	0	ABB	Jul-15
14	12073	Ordinances	Fillmore (Utah)		0	0	ABB	Jul-15
15	13111	Civil case files	District Court (Seventh District : Garfield)		0	0	JEK	Jan-15
16	13114	Criminal case files	District Court (Seventh District : Garfield)		0	0	JEK	Jan-15
17	13190	William S. Callaghan Reference collection	Department of Administrative Services		0	0	ABB	May-16
18	13300	Arrest and jail record book	Ogden (Utah). Ogden Police Department		0	0	JEK	Jul-15
19	14031	Board of Education minute	Ogden School District (Utah)		4	11	ABB	Apr-16
20	17529	Military records section	State Historical Society		0	13	GMS	Mar-16
21	23526	Photographs	Salt Lake City (Utah). Fire Department		0	0	JEK	Jan-15
22	24293	Civil case files	District Court (Second District)		0	0	JEK	Dec-15
23	25010	Employee newsletters	Salt Lake City (Utah). Mayor. Division of		0.2	0	ABB	Jan-16
24	25113	Proof of publication record	Salt Lake City (Utah). City Recorder		0	0	ABB	Apr-15
25	25943	Criminal registers of action	District Court (Fourth District : Utah)		1	1	ABB	Apr-16
26	26068	Civil and criminal case index	District Court (Second District : Davis)		0	4	ABB	Sep-15
27	26195	Naturalization records	District Court (Seventh District : Garfield)		0	1	ABB	Jan-15
28	26262	Probate case files	District Court (Seventh District : Garfield)		0	0	JEK	Jan-15
29	27773	Probate case files	District Court (Sixth District : Kane County)		0	0	ABB	Apr-15
30	27861	Civil registers of action	District Court (Eighth District : Uintah County)		7.5	0	ABB	Mar-16

Reference Copy (Film) Labels

- Mpage report
- Query is an input process that asks for one or more series numbers



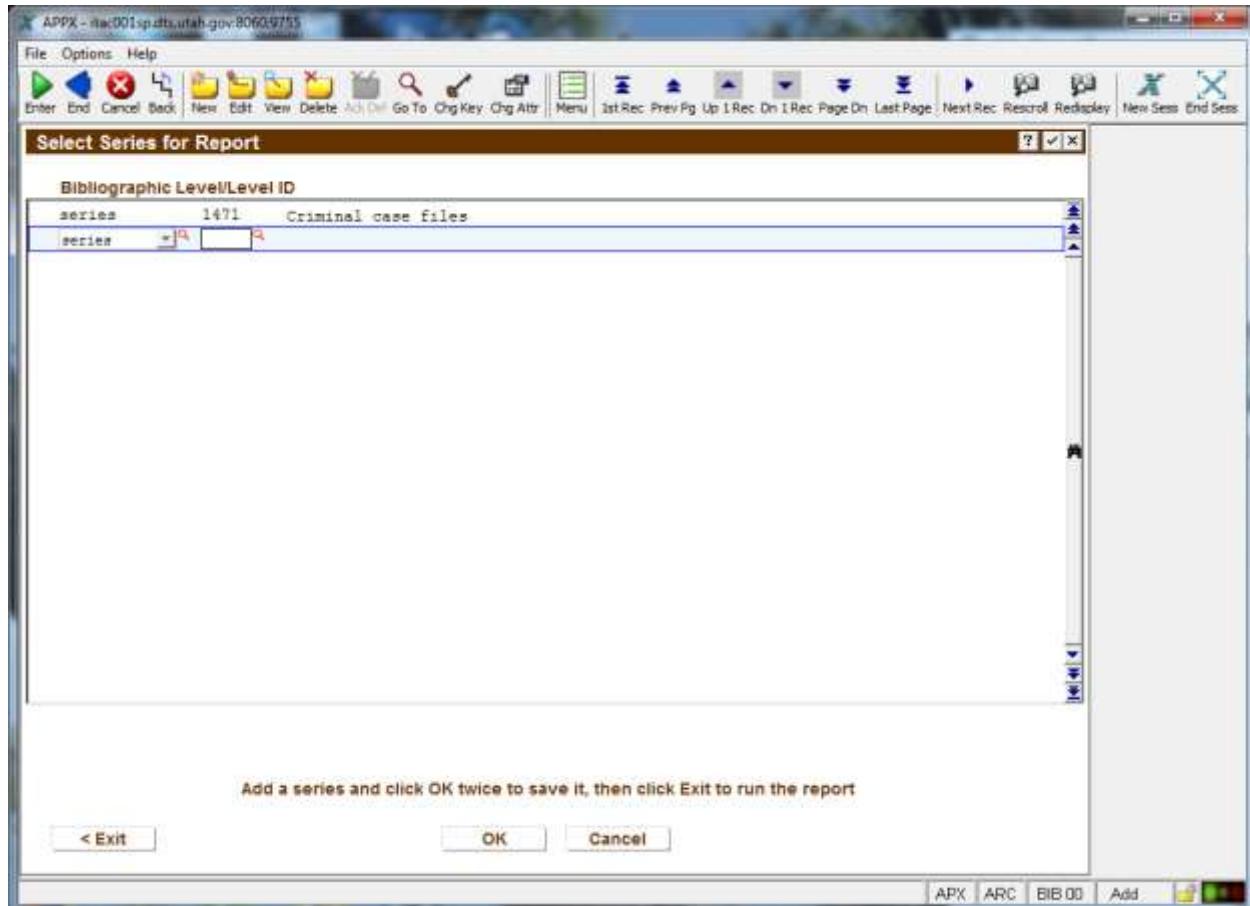
[Bug report: results in an Element Record Not Found error.]



Reference Copy List

- Text report
- Query is an input process that asks for one or more series
- No sort
- Data includes:
 - Agency number
 - Agency name
 - Series number
 - Series title
 - Reel number
 - Accession number

- Date range
- Index range



REEL#	INDEX#	DATE	THRU DATE
1426 - Dist. Court 1st Salt Lake Co., series 1671 Criminal case files			
REEL# 18	ACCESSION# 121300	INDEX From: Case 975 DATES From: 12 01 1902	Thru: Case 999 Thru: 13 19 1903
REEL# 4	ACCESSION# 120652	INDEX From: 000161 DATES From: 11 24 1906	Thru: 000217 Thru: 12 31 1907
REEL# 5	ACCESSION# 120976	INDEX From: 000228 DATES From: 04 30 1907	Thru: 000246 Thru: 08 16 1907
REEL# 6	ACCESSION# 120692	INDEX From: 000287 DATES From: 06 16 1907	Thru: 000299 Thru: 11 10 1908
REEL# 11	ACCESSION# 121004	INDEX From: 000476 DATES From: 07 15 1909	Thru: 000518 Thru: 12 07 1909
REEL# 8	ACCESSION# 120949	INDEX From: 000390 DATES From: 10 27 1900	Thru: 000447 Thru: 11 03 1908
REEL# 22	ACCESSION# 121630	INDEX From: 001111 DATES From: 09 04 1903	Thru: 001133 Thru: 12 16 1903
REEL# 23	ACCESSION# 121658	INDEX From: 001134 DATES From: 11 19 1903	Thru: 001181 Thru: 13 04 1908
REEL# 20	ACCESSION# 121859	INDEX From: 001000 DATES From: 03 28 1903	Thru: 001248 Thru: 17 07 1903
REEL# 21	ACCESSION# 121918	INDEX From: 001049 DATES From: 07 07 1903	Thru: 001110 Thru: 09 04 1903
REEL# 1	ACCESSION# 120742	INDEX From: 000001 DATES From: 02 17 1906	Thru: 000039 Thru: 07 28 1908
REEL# 28	ACCESSION# 124690	INDEX From: 002182 DATES From: 03 04 1904	Thru: 002168 Thru: 10 05 1904

Reference Copy Processed Series

[Bug report: option does not run, no optional process tied to menu item. Might have intended to be BIB Job REFECOPY PROCESSED.]

- Text report
- Query asks for:
 - Series processed by whom
 - Series processed date
 - Series number
- Sort by:
 - Series number
 - Accession number
 - Reel number
 - Year
 - Month
 - Index range
- Data includes:
 - Series number
 - Series title
 - Agency number
 - Agency short name
 - Reel number
 - Accession number

- Index range
- Date range

Series	ID	Description	Start Date	End Date
1471	115322	Criminal case files	003881	003848
		Dist. Court 3rd Salt Lake Co.	31.12.1853	06.03.1853
	115328		003717	003888
			31.02.2004	11.02.1854
	115388		003870	004043
			06.01.2005	06.14.1853
	115313		004046	004133
			06.14.2005	11.11.1853
	115314		004131	004186
			11.02.2005	01.12.1856
	118212	Gove #297	004187	004200
			01.12.1856	06.08.1854
	118213		003811	003878
			11.02.2004	02.22.1853
	120843		003881	000039
			02.17.1886	07.28.1886
	120883		003885	000039
			10.02.1886	11.02.1886
	120635		000086	000183
			11.02.1886	11.12.1886
	120882		000143	000217
			11.14.1886	03.31.1887
	120883		000200	000333
			01.14.1888	06.24.1888
	120876		000216	000246
			06.20.1887	06.14.1887

 The application interface includes a menu bar (File, Process, Options, Help), toolbar, and status bar at the bottom."/>

Retention/Designation by Agency

- PDF report
- Parameters controlling display of certain elements are set from an input screen, asking for:
 - Print the superior agency
 - Print the agency approval signature sheet
 - Print the SRC approval signature sheet
 - Print Personal data elements
 - Print GRAMA data
 - Print Page numbers
 - Print user, date, time
 - Print SRC approved/not approved
 - Print closed series
 - Print format management information
 - Print program name (disabled)
- Query asks for:
 - Agency hierarchy levels 1 through 5
 - State Records Committee approved checkbox
 - State Records Committee approved date

- Agency number
 - Series number range
 - Series cataloged date range
- Data includes:
 - Agency name
 - Agency number
 - Agency address
 - Agency phone
 - Records officer name
 - Series number
 - Series title
 - Series title
 - Series dates
 - Series arrangement
 - Series schedule description
 - Retention
 - Disposition
 - Retention and disposition authorization (e.g. SRC approval, general schedule, etc.)
 - Date schedule was authorized
 - Format management retention
 - Appraisal values
 - Appraisal text
 - Primary designation
 - Secondary designation
 - Review and update status

The screenshot shows a Microsoft Word document window. The title of the document is "Retention and Classification Report". Inside the document, the following text is visible:

Agency: Department of Human Services. Division of Aging and Adult Services, Adult Protective Services (2725)
, UT

Records Officer: Terri Ruesch

17485 Client case files
24565 Client trust account files
17863 Investigation files

On the right side of the screen, there is a vertical ribbon of icons for a PDF editor, likely Adobe Acrobat. The icons include: Export PDF, Edit Report PDF, Create PDF, Edit PDF, Comment, Control Risks, Fill & Sign, Send for Signature, and Send & Track.

Retention/Designation by Series

- PDF report
- Query is an input process that asks for one or more series numbers
- Parameters controlling display of certain elements are set from an input screen, asking for:
 - Print the superior agency
 - Print the agency approval signature sheet
 - Print the SRC approval signature sheet
 - Print Personal data elements
 - Print GRAMA data
 - Print Page numbers
 - Print user, date, time
 - Print SRC approved/not approved
 - Print closed series
 - Print format management information
 - Print program name (disabled)
- Data includes:
 - Agency name
 - Agency number
 - Agency address
 - Agency phone
 - Records officer name
 - Series number
 - Series title
 - Series title
 - Series dates
 - Series arrangement
 - Series schedule description
 - Retention
 - Disposition
 - Retention and disposition authorization (e.g. SRC approval, general schedule, etc.)
 - Date schedule was authorized
 - Format management retention
 - Appraisal values
 - Appraisal text
 - Primary designation
 - Secondary designation
 - Review and update status

Utah State Archives

Page: 1

AGENCY: Department of Public Safety, Driver License Division, Records Bureau

SERIES: 81215

TITLE: Incident report files

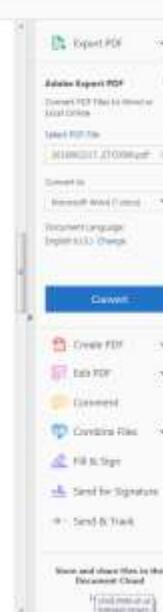
DATES: 1981-2012.

ARRANGEMENT: Numerical by file number

DESCRIPTION:

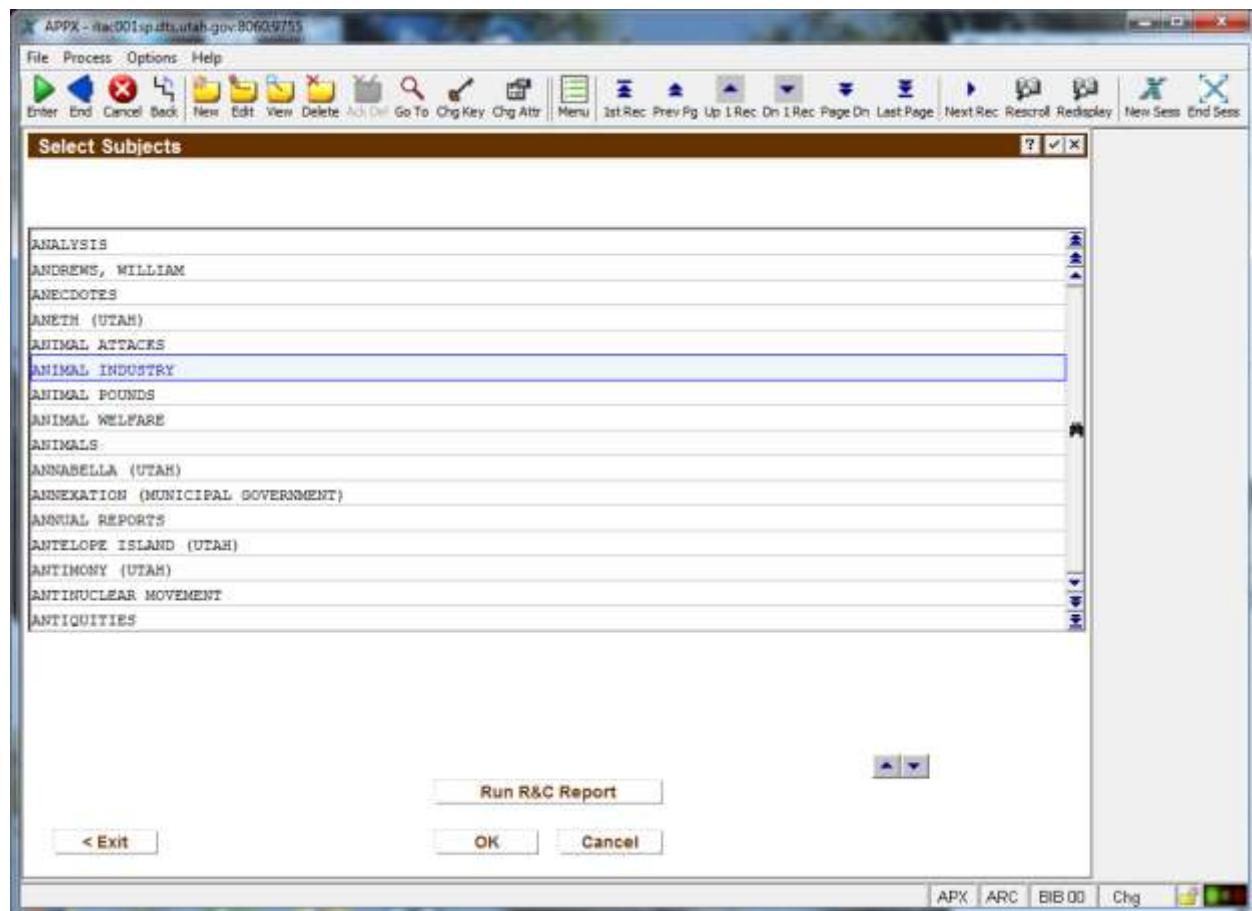
These are the initial written or recorded reports that are made by police officers describing actions initially taken in response to a complaint or the discovery of an apparent violation of law. The reports may contain "the dates, time, location, and nature of the complaint, the incident, or offense; names of victims; the nature or general scope of the agency's initial actions taken in response to the incident; the general nature of any injuries or estimate of damages sustained in the incident; the name, address, and other identifying information about any person arrested or charged in connection with the incident; or the identity of the public safety personnel (except undercover personnel) or prosecuting attorney involved in responding to the initial incident" (UCA 63G-2-103(14) (2012)). These reports do not include follow-up or investigative reports prepared after this initial report. Please also see Schedule 21, Item #3 "Arrest

3

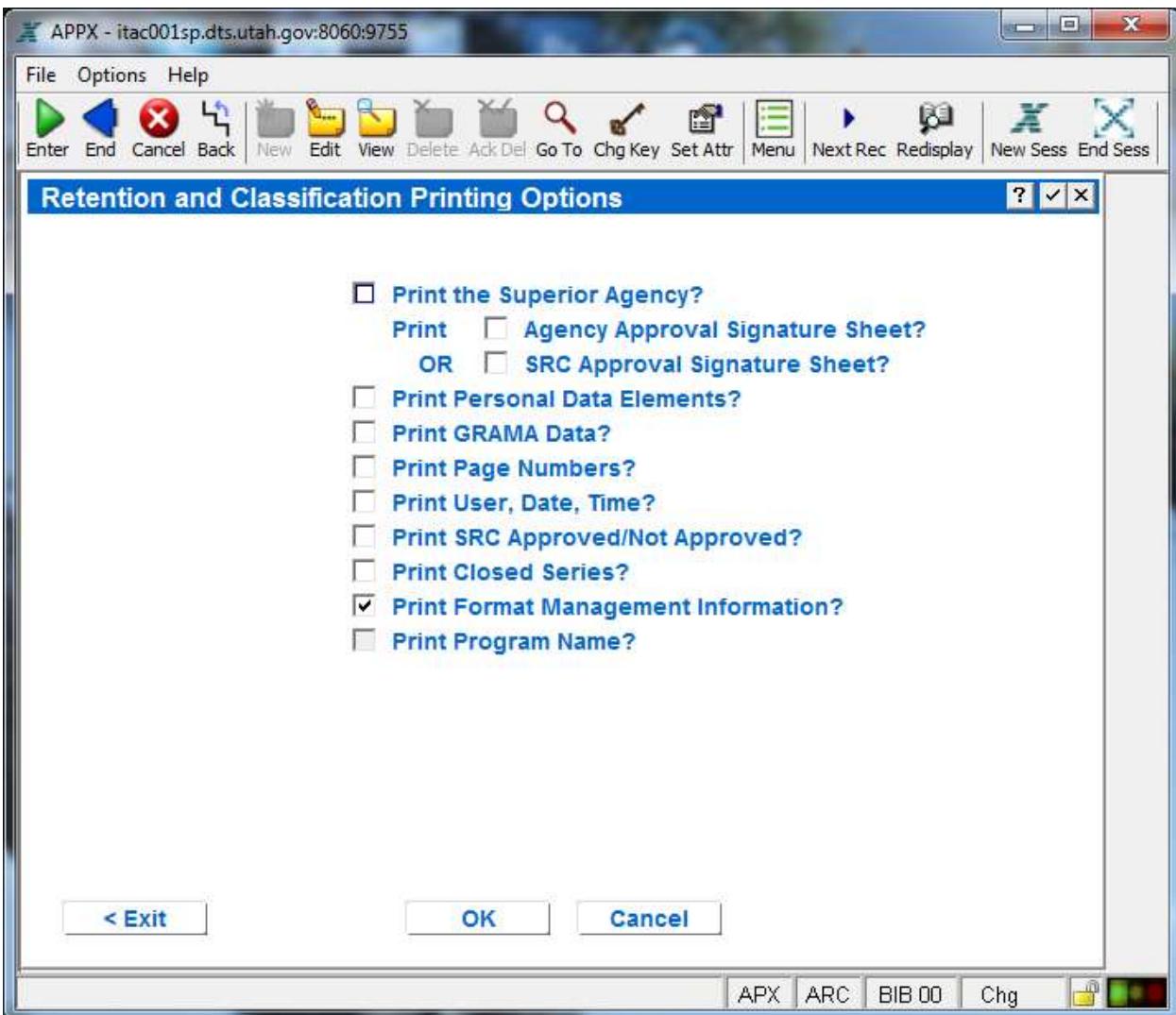


Retention/Designation by Subject

- PDF report
- Query is an input process that displays all subject terms in use. Pick a subject, and then click Run R&C Report. To navigate the Subjects file, click the Go To button on the toolbar.



[Bug report: Parameters screen is in the blue design instead of brown.]



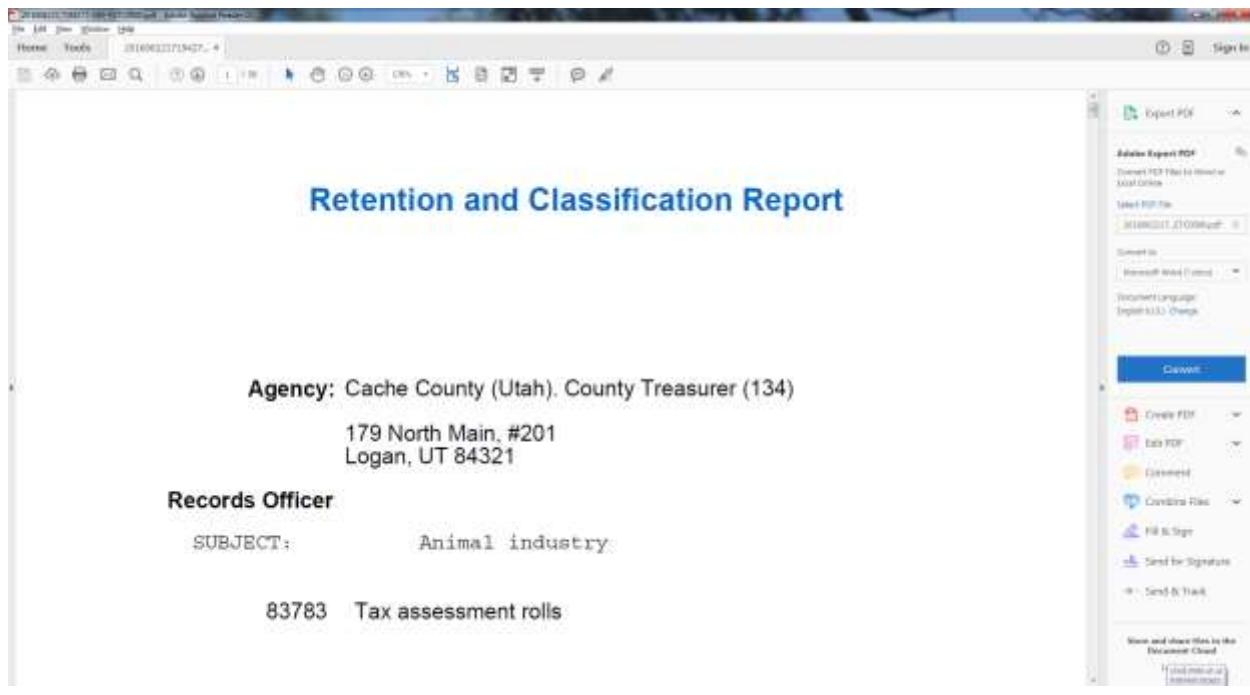
Retention and Classification Report

Agency: Cache County (Utah). County Treasurer (134)
179 North Main, #201
Logan, UT 84321

Records Officer

SUBJECT: Animal industry

83783 Tax assessment rolls



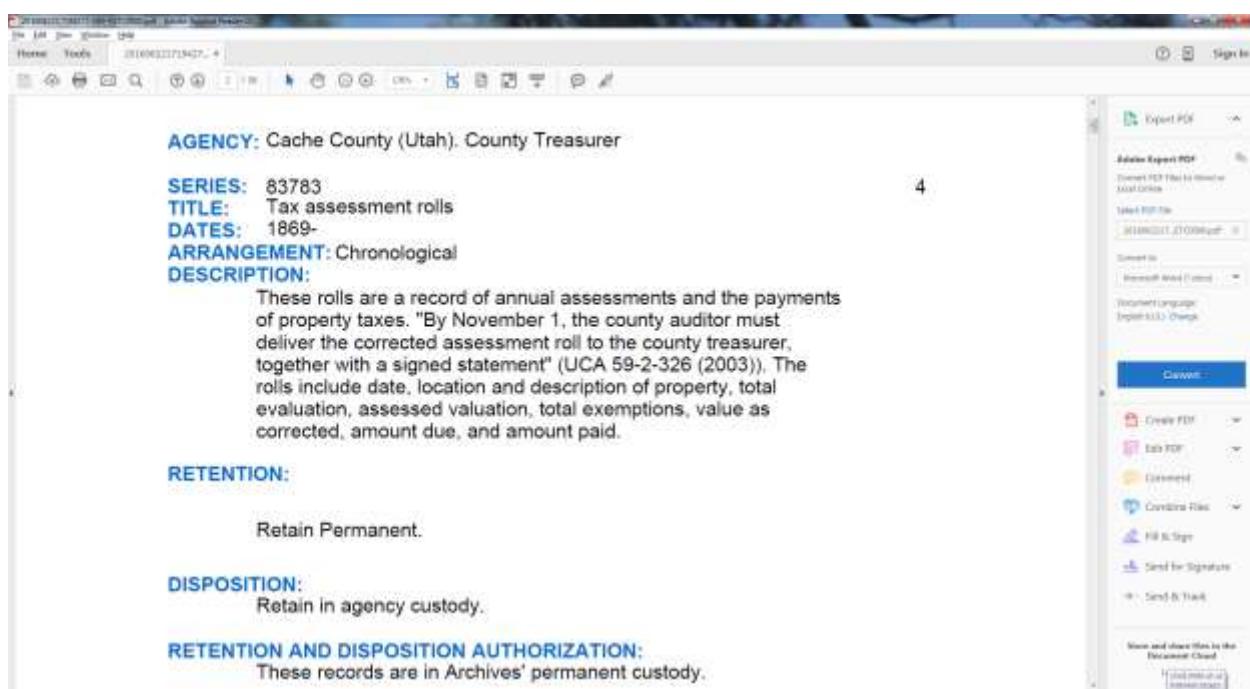
AGENCY: Cache County (Utah). County Treasurer

SERIES: 83783 4
TITLE: Tax assessment rolls
DATES: 1869-
ARRANGEMENT: Chronological
DESCRIPTION:
These rolls are a record of annual assessments and the payments of property taxes. "By November 1, the county auditor must deliver the corrected assessment roll to the county treasurer, together with a signed statement" (UCA 59-2-326 (2003)). The rolls include date, location and description of property, total evaluation, assessed valuation, total exemptions, value as corrected, amount due, and amount paid.

RETENTION:
Retain Permanent.

DISPOSITION:
Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:
These records are in Archives' permanent custody.



Retention Short List

- Text report
- Query asks for:
 - State Records Committee date range
 - State Records Committee approved checkbox
 - Agency number
- Sort by:
 - Entity name (aka agency short name)

- Series title
- Data includes
 - Series title
 - Format
 - Length of retention in office
 - Length of retention in Records Center
 - Length of retention in Archives

Retention List			
Agency	Series Title	Format	Retention
	Accessioned publications 1983-1977	Paper	PER
	Administrative records	Paper	PER
	Adult day care complaint files	Paper	2 YRS
	Total Volume: 1.1 cubic feet		
	Advisory council meeting minutes	Paper	2 YRS 3 YRS PER
	Aging and adult services case files	Paper	2 YRS 3 YRS
	Annual Governor's Centennial Celeb.	Paper	5 YRS 5 YRS PER
	Annual reports	Paper	PER
	Chronological files	Paper	1 YRS 11 YRS PER
	Client case files	Paper	1 YRS 3 YRS
	Client committee files	Paper	2 YRS
	Total Volume: 3.2 cubic feet		
	Contract files (AAA's)	Paper	1 YRS 4 YRS
	Daily activity schedules	Paper	2 YRS 3 YRS
	Disaster contract files	Paper	2 YRS 3 YRS
	Accumulation: 2.5 cubic feet		
	Executive correspondence	Paper	2 YRS PER
	Financial information network (FINE)	Paper	1MTH 7 YRS
	Financial records	Paper	
	Total Volume: 3.8 cubic feet		
	Final review records	Paper	1 YRS 6 YRS
	Grant project files	Paper	1MTH 3 YRS
	Information memorandums and programs	Paper	1 YRS 3 YRS
	Investigation files	Paper	2 YRS 8 YRS
	Local project files	Paper	1 YRS
	Total Volume: 3.2 cubic feet		
	Warning home invasion file		
	Total Volume: 3.2 cubic feet		
	Undisposed case files	Paper	5 YRS 3 YRS
	Accumulation: 1.8 cubic feet		
	Undisposed senior complaint log	Paper	6MTH
	Personnel files for permanent employ.	Paper	10 YRS 30 YRS
	Policy and procedures manuals	Paper	1 YRS 8 YRS PER
	Protective adult services case file	Paper	1 YRS 8 YRS
	Publications	Paper	PER

Retention Format Changes

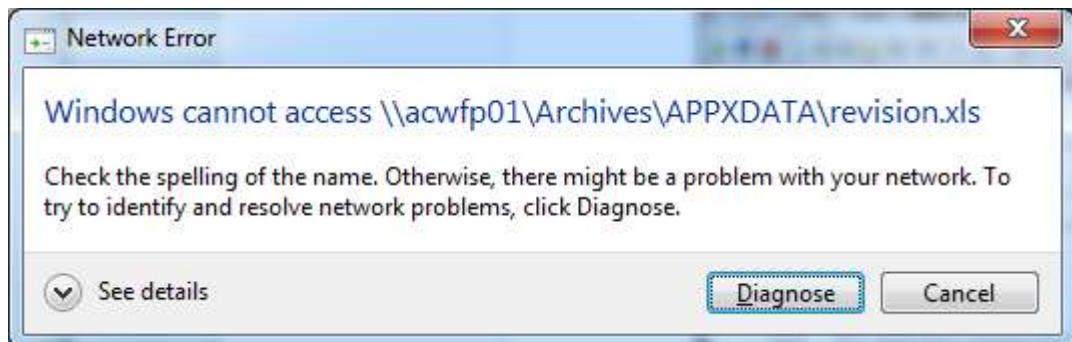
- Text report
- Query asks for:
 - When changed date range
 - Who changed
- Sort by:
 - When changed
 - Series number (aka bibliographic key)
- Data includes:
 - Series number
 - Series title
 - Initials of person making a change to format management
 - Date change was made

series	29768	Utak mining oral histories	86	12/16/2013
series	89128	Criminal history name file	86	12/27/2013
series	9458	Chamorro contracts and special na	86	12/26/2013
series	18153	Utak criminal history records	86	12/04/2013
series	20378	high-profile criminal history case	86	12/04/2013
series	13918	file extensions applications	86	12/05/2013
series	14828	bearing recordings	86	12/05/2013
series	14828	bearing recordings	86	12/05/2013
series	14828	bearing recordings	86	12/05/2013
series	82473	Water user claim books	86	12/06/2013
series	10100	Appeals files	86	12/06/2013
series	29770	Murray Board of Education meeting m	86	12/06/2013
series	86562	Expunged criminal records	86	12/09/2013
series	27462	Dated expenditure packets	86	12/10/2013
series	14943	Designation of emergency liaison su	86	12/12/2013
series	14943	Designation of emergency liaison su	86	12/12/2013
series	20761	Executive correspondence	86	12/13/2013
series	20761	Immigration consultant registration	86	12/14/2013
series	20761	Executive correspondence	86	12/14/2013
series	8881	Gas refund warrant requests transac	86	12/16/2013
series	20783	Medical Advisory Board hearing and	86	12/03/2013
series	5331	Official student transcripts	86	12/14/2013
series	5331	Official student transcripts	86	12/14/2013
series	5331	Official student transcripts	86	12/14/2013
series	10022	Official student transcripts	86	12/14/2013
series	10022	Official student transcripts	86	12/14/2013
series	10022	Official student transcripts	86	12/14/2013
series	5331	Official student transcripts	86	12/15/2013
series	6884	Official student transcripts	86	12/15/2013
series	6884	Official student transcripts	86	12/15/2013
series	6884	Official student transcripts	86	12/15/2013
series	6884	Official student transcripts	86	12/15/2013
series	6884	Official student transcripts	86	12/15/2013
series	10022	Official student transcripts	86	12/15/2013
series	29398	Official student transcripts	86	12/15/2013
series	29398	Official student transcripts	86	12/15/2013
series	29398	Attendance reports	86	12/16/2013

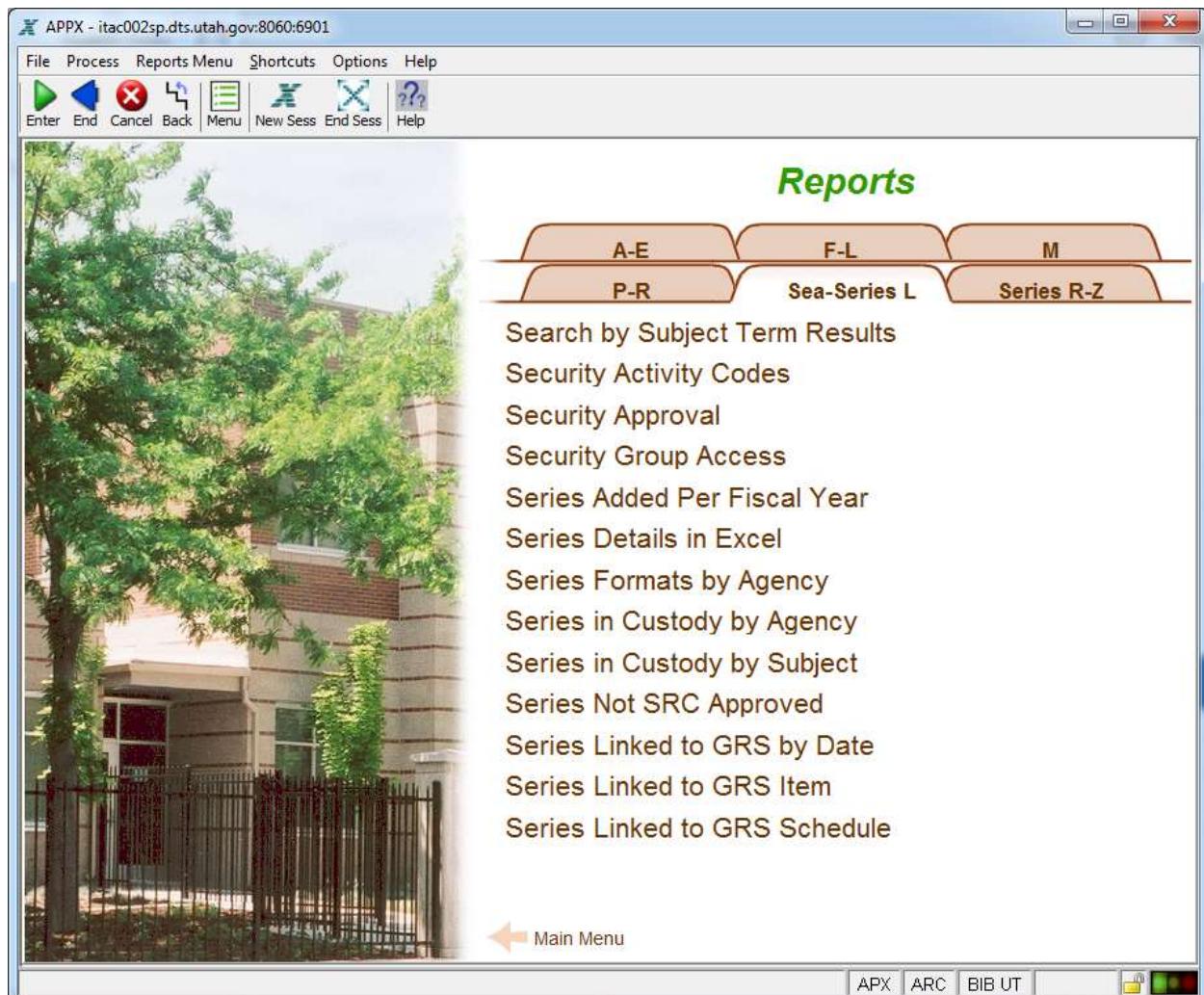
Revision History in Excel

- Spreadsheet report
- Query asks for:
 - Revision date range
 - Series number (aka bibliographic record id)
- No sort
- Data includes:
 - Series number
 - Revision sequence number
 - Series title
 - Agency long name
 - Revision date
 - Revision note

[Bug report: Server information needs to be updated so the file can be uploaded to the client.]

A screenshot of Microsoft Excel showing a table with over 50 rows of data. The columns are labeled A through P. Column A contains numerical IDs, column B contains descriptions, column C contains agency names, column D contains dates, and column E contains notes. The notes column contains detailed descriptions of changes made to container lists, often mentioning Gina Strack and Alan Barnett.

Click on the Sea-Series L tab.



Search by Subject Term Results

- Query uses input process, asks for:
 - Agency short name
 - Agency key range
 - Series title
 - Series number range
 - Subjects
 - Just permanent records
 - Disregard series whose title begins with
- No sort
- Data includes:
 - Agency name
 - Agency number
 - Series number
 - Series title
 - Series dates
 - Series arrangement

- Series schedule description
- Series appraisal
- Access restrictions
- Finding aids
- Access points
- Cataloged copy

APPX - itac001sp.dts.utah.gov:8060:17303

File Process Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Set Attr Menu Next Rec Redisplay New Sess End Sess

Search Series by Subject Terms

Search Any Combination of Fields

Agency Name: Agencies: through

Series Title: Series:

Subjects: through

Subject Modifiers

Limit Search

Just Permanent Records:

Disregard Series whose Title Begins with:

Add search terms, click OK to run search, click Exit to run report

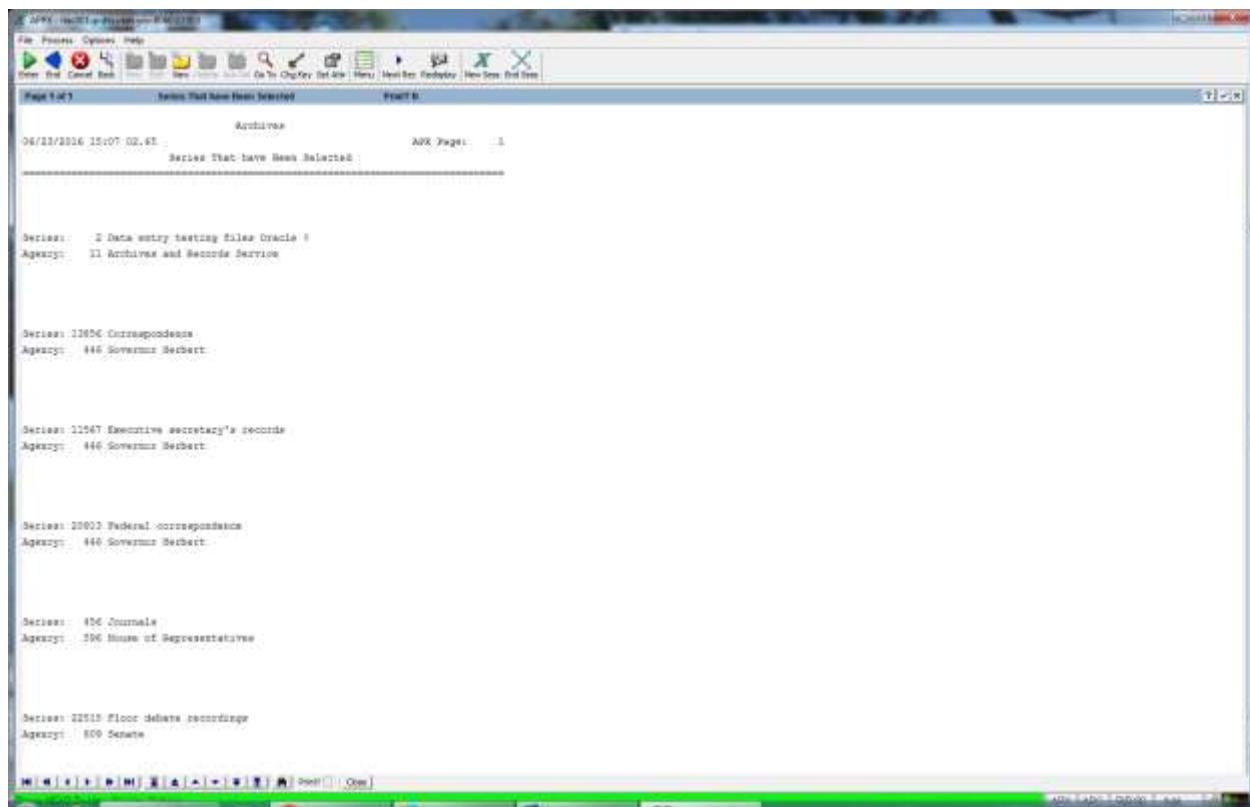
Number of Series Found:

< Exit OK Cancel Go to Search Results

APX ARC BIB 00 Add

[Bug report: input process should use brown design instead of blue.]

Clicking OK on the input process produces a simple list with series and agency information of the hits:



Clicking Go to Search Results button produces this report:

This screenshot shows a detailed archival finding aid report. The title bar reads "Page 3 of 75" and "PRIMUS". The report includes the following sections:

- Governor (1268-1) Herbert - 00448**
- Series:** Title: Executive secretary's records
12567 Date: 1862-1970.
Arrangement: Chronological by year.
- DESCRIPTION:**

This series contains records preserved by Macel Thamm, executive secretary to Governor Hampton throughout his three terms in office. This series includes memorabilia from various conventions and conferences, such as the National Governor's Conference meeting in Washington, D.C., in 1975, and the Western Governors' Conference meeting in Park City, Utah, in 1976. Records also include newspaper clippings from 1865 to 1986.
- APPRAISAL:**

This series has historical value. This disposition is based on information provided in aspects of the Hampton administration as chief executive for the state.
- RESTRICTED ACCESS:**

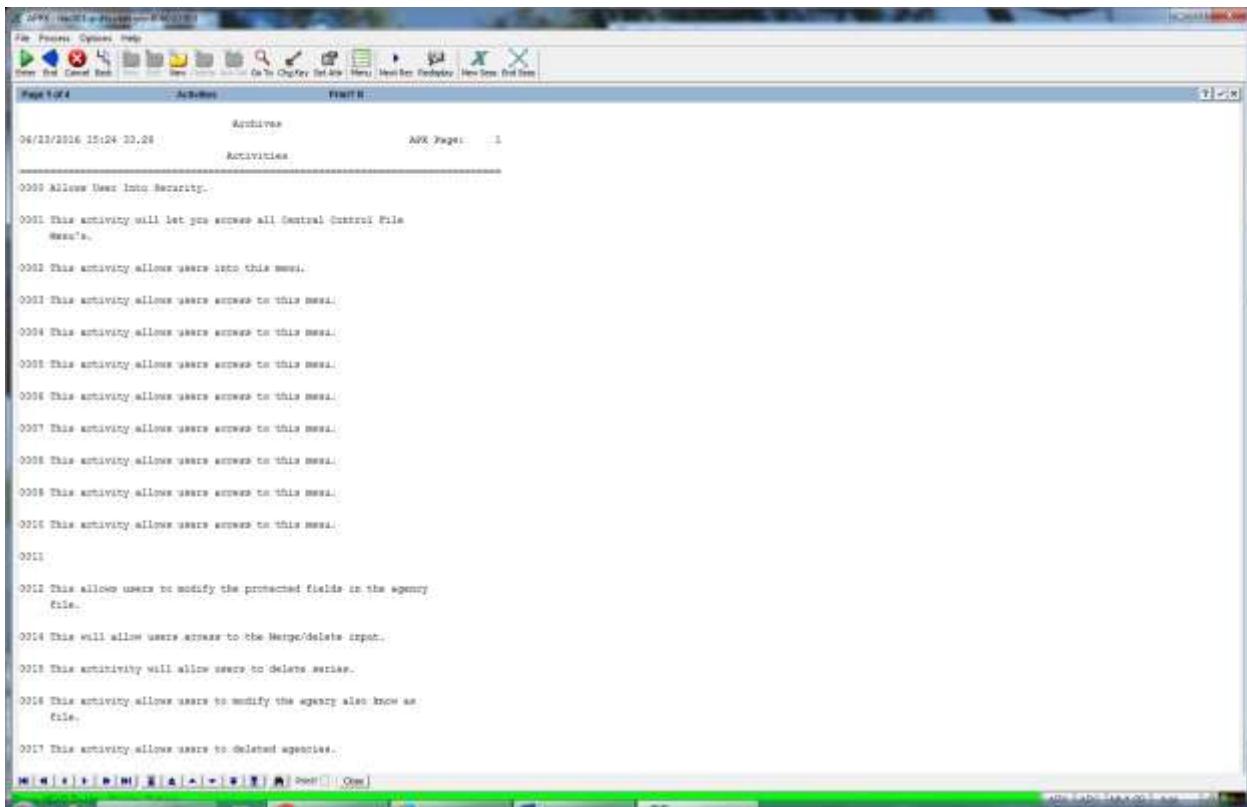
Access public share are as access restrictions.
- FINDING AIDS:**

Brief inventory available.
- ACCESS POINTS:**

Governor-Records and correspondence
Governor-Staff
National Governor's Conference
Hampton, Calvin L., 1813-2007
Western Governors' Conference
- CATALOGED COPY:**

Security Activity Codes

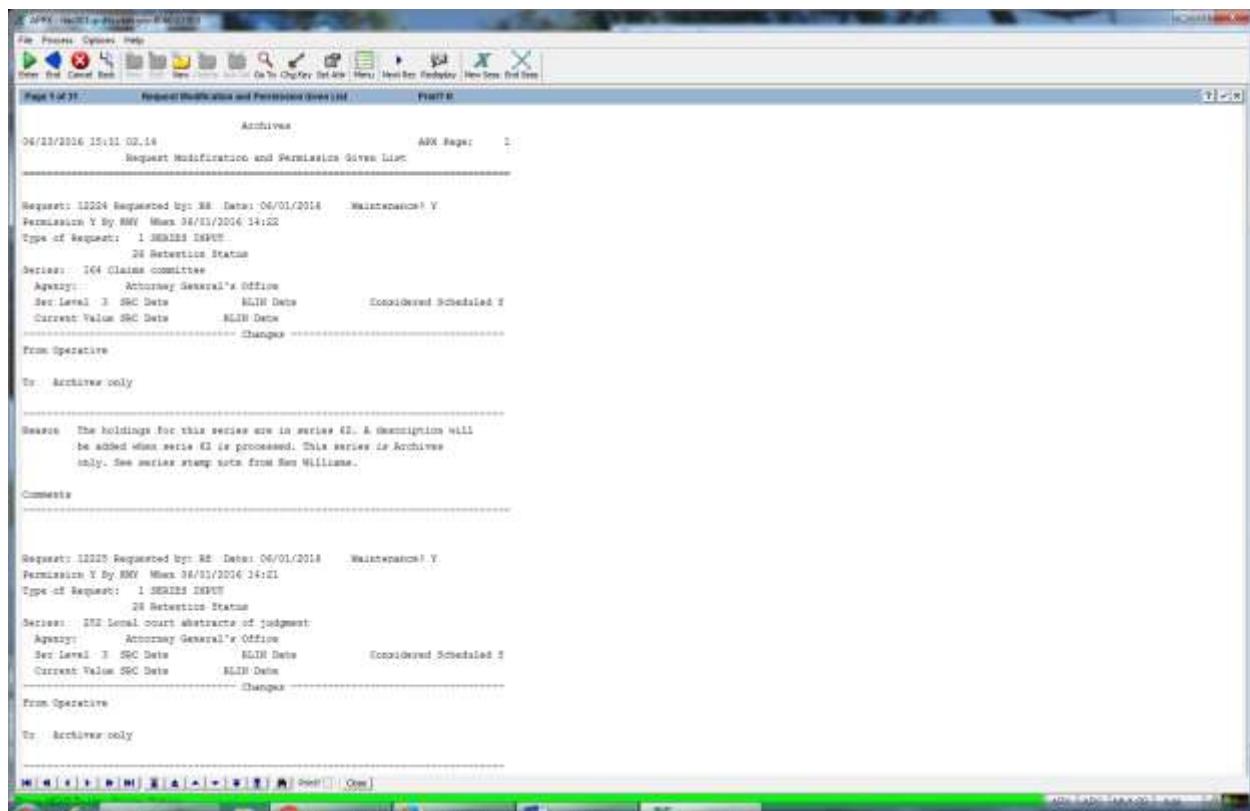
- Text report
 - No query
 - No sort, defaults by numerical order of security code
 - Data includes:
 - Security code number
 - Description of purpose of security code



Security Approval

- Text report
 - Query asks for:
 - Permission given by
 - Permission requested date range
 - Resubmit series to the State Records Committee
 - State Records Committee approval date
 - Series cataloged date
 - Permission requested by
 - Function to change (always has a value of 1)
 - Field to change
 - Sort by security key
 - Data includes:
 - Request number
 - Requested by

- Date requested
- Whether change is for maintenance
- Whether permission was given
- Who gave permission
- When permission was given
- Type of request
- Series number
- Agency name
- Security level of series
- State Records Committee approval date
- Cataloged date (aka RLIN date)
- Whether considered scheduled
- Description of change
- Reason
- Comments



Security Group Access

- Text report
- No query
- No sort, defaults to alphabetical by field name
- Data includes:
 - Security groups set at each security level, and whether those groups have the ability to change data directly or give permission to change.

[Bug report: running the report results in an Invalid Occurrence Number error.]

APPX - itac001sp.dts.utah.gov:8060:17303

File Options Help

Go Cancel Step S-Int S-Rtn S-End Trap Edit Inspect Stack Watch

. SPECIAL SECURITY LISTING 0000200.001 Out Pre-Display

```

SET      MV1 SPECPERM SPECCLVLS KEY      =      0
BEG AT   MV1 SPECPERM IN MV1 SPECPERM KEY
SET      MV1 SPECPERM SPECCLVLS KEY      =      9
END AT   MV1 SPECPERM IN MV1 SPECPERM KEY
SET      --- X                      =      0
SET      --- A                      =      0
SET      --- B                      =      0
SET      --- C                      =      0
SET      --- D                      =      0
SET      --- E                      =      0
SET      --- F                      =      0
SET      --- G                      =      0
SET      --- H                      =      0
BEG READ MV1 SPECPERM          HOLD 0 KEY IS SPECPERM KEY
SET TEMP 79      AT 001 FOR 025 FROM 001 OF MV1 SPECPERM SECURITY GRP
SET      MV1 WORK ALPHA 25          = --- TEMP 79
IF      MV1 SPECPERM PERM CHG      EQ      C
- IF    MV1 SPECPERM SPECCLVLS KEY EQ      1
-- IF   MV1 SPECPERM SPECCLVLS KEY EQ      2
--- IF  MV1 SPECPERM SPECCLVLS KEY EQ      2
---- IF MV1 SPECPERM SPECCLVLS KEY EQ      2
TT--- COMPUTE --- A            +      1
TT--- SET    MV1 WORK CHANGE 1      A      = MV1 WORK ALPHA 25
T-T-- COMPUTE --- B            +      1
T-T-- SET    MV1 WORK CHANGE 2      B      = MV1 WORK ALPHA 25
T--T- COMPUTE --- C            +      1
T--T- SET    MV1 WORK CHANGE 3      C      = MV1 WORK ALPHA 25
T---T COMPUTE --- D            +      1
T---T SET    MV1 WORK CHANGE 4      D      = MV1 WORK ALPHA 25
FT--- COMPUTE --- E            +      1
FT--- SET    MV1 WORK PERM 1       E      = MV1 WORK ALPHA 25
F-T-- COMPUTE --- F            +      1
F-T-- SET    MV1 WORK PERM 2       F      = MV1 WORK ALPHA 25
F--T- COMPUTE --- G            +      1
F--T- SET    MV1 WORK PERM 3       G      = MV1 WORK ALPHA 25
F---T COMPUTE --- H            +      1
F---T SET    MV1 WORK PERM 4       H      = MV1 WORK ALPHA 25
END READ MV1 SPECPERM

```

App	Field Name	Occ	Field Value
MV1	WORK CHANGE 1	A	" m xé i Y°
MV1	WORK ALPHA 25		SRC

The screenshot shows a software interface with a menu bar (File, Process, Options, Help) and a toolbar. The main window title is "Special Security Listing". It displays four tables of access rights:

- Access Rights:**

	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
CHANGE	SP ADMINISTRATOR	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR
	ARMON SERVICES	PROCESSING/CATALOGING	PROCESSING/CATALOGING	PROCESSING/CATALOGING
	PROCESSING SUPERVISOR	PROGRAMMER	PROGRAMMER	PROGRAMMER
	PROCESSING/CATALOGING	SLIS	SLIS	SLIS
	PROGRAMMER			
	SLIS			
	SLIC			
- GIVE PSM:**

	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
GIVE PSM:	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR
	PROCESSING/CATALOGING			
- Agency - Full Modification Rights:**

	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
GIVE PSM:	SP ADMINISTRATOR	SP ADMINISTRATOR	SP ADMINISTRATOR	SP ADMINISTRATOR
	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR	PROCESSING SUPERVISOR
- Agency Number:**

	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
CHANGE	SP ADMINISTRATOR	SP ADMINISTRATOR	SP ADMINISTRATOR	SP ADMINISTRATOR
	ARMON SERVICES			
	PROCESSING			
	PROCESSING SUPERVISOR			
	PROCESSING/CATALOGING			

Series Added Per Fiscal Year

- Text report
- Query asks for (with a Page Down requirement):
 - When series was added date range
 - Who added the series
 - Who changed the series
 - Series number range
 - When series was changed date range
 - Series processed date
 - Series processed by
 - Series cataloged before checkbox
 - State Records Committee date
 - State Records Committee approved checkbox
 - Classification
 - Date series cataloged
 - Security level
 - Retention status
- Sort by:
 - Series number
 - When series was added
- Data includes:

- Series number
- Series title
- Security level
- When series was added
- Who added the series
- When series was last changed
- Who changed the series

The screenshot shows a Windows application window titled "Total series added per fiscal year". The window has a standard Windows interface with a menu bar (File, Process, Options, Help) and a toolbar. The main area contains a table with the following columns: Series Short Number, Series Title, Security Level, When Added, and When Changed. The data is sorted by When Added. Most entries have a security level of "ARW" and were added and last changed on 08/13/2013.

Series Short Number	Series Title	Security Level	When Added	When Changed
28888	Expenditure of funds ledger	ARW	08/13/2013	08/13/2013 by ARW
28878	Grand jury records	ARW	08/13/2013	08/13/2013 by ARW
28877	Daily cashier deposits and receipts	ARW	08/13/2013	08/13/2013 by ARW
28878	Meeting minutes	ARW	08/13/2013	08/13/2013 by ARW
28878	Building permits	ARW	08/13/2013	08/13/2013 by ARW
28888	Residential building plans	ARW	08/13/2013	08/13/2013 by ARW
28888	Nonresidential building plans	ARW	08/13/2013	08/13/2013 by ARW
28882	KIDNAPERS AND FELONS INVESTIGATIONS	ARW	08/13/2013	08/13/2013 by ARW
28882	HOMICIDE, VIOLENT FELONIES AND SEX	ARW	08/13/2013	08/13/2013 by ARW
28884	DAILY ACTIVITY RECORDS	ARW	08/13/2013	08/13/2013 by ARW
28885	SUICIDE INVESTIGATION FILES	ARW	08/13/2013	08/13/2013 by ARW
28886	Workers compensation case files	ARW	08/13/2013	08/13/2013 by ARW
28888	Brand names	ARW	08/13/2013	08/13/2013 by ARW
28888	Earth Mitigation Assistance	ARW	08/13/2013	08/13/2013 by ARW
28883	Operational Activities	ARW	08/13/2013	08/13/2013 by ARW
28882	State Emergency Management: IED: Ctr	ARW	08/13/2013	08/13/2013 by ARW
28883	Emergency Management Assistance Ctr	ARW	08/13/2013	08/13/2013 by ARW
28884	Emergency Management Accreditation	ARW	08/13/2013	08/13/2013 by ARW
28885	Emergency 509A and checklist	ARW	08/13/2013	08/13/2013 by ARW
28886	Disaster plan records	ARW	08/13/2013	08/13/2013 by ARW
28887	State FEMA/Dept of Homeland Security	ARW	08/13/2013	08/13/2013 by ARW
28888	Utah Native American Tribal Activit	ARW	08/13/2013	08/13/2013 by ARW
28888	Employee Training	ARW	08/13/2013	08/13/2013 by ARW
28778	Flood Mapping	ARW	08/13/2013	08/13/2013 by ARW
28772	Social Media	ARW	08/13/2013	08/13/2013 by ARW
28712	Multimedia	ARW	08/13/2013	08/13/2013 by ARW
28773	Division Committees/Schedule	ARW	08/13/2013	08/13/2013 by ARW
28774	Council minutes	ARW	08/13/2013	08/13/2013 by ARW
28775	Audit reports	ARW	08/13/2013	08/13/2013 by ARW
28776	RIGHT OF WAY RECORDS	ARW	08/13/2013	08/13/2013 by ARW
28777	Assessment files	ARW	08/13/2013	08/13/2013 by ARW
28778	REQUEST FOR RECORDS	ARW	08/13/2013	08/13/2013 by ARW
28779	Operations Committee meeting notes	ARW	08/13/2013	08/13/2013 by ARW
28779	Denied applications	ARW	08/13/2013	08/13/2013 by ARW

Series Details in Excel

- Spreadsheet report
- Query asks for:
 - When series was added date range
 - Agency type
 - Agency number
 - Series number range
 - Is this a general schedule, not a series checkbox
- No sort
- Data includes:
 - Series number
 - Agency number
 - Agency long name
 - Agency type
 - Agency defunct

- Agency dissolved date
- Series title
- Series dates
- Appraisal administrative value
- Appraisal fiscal value
- Appraisal historical value
- Appraisal legal value
- Appraisal text
- Whether considered scheduled
- State Records Committee approval date
- Series added date
- Series security level
- Series schedule description
- Series catalog description
- Retention
- Disposition
- Format management
- Primary designation
- Secondary designation(s)
- Series updated date

seriesholdings.csv - Excel

	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	dates	adminstr_fiscal	historical	legal	appraisal	considered	src_date	date_added	security	schedule	catalog	d retention	dispositio	m	primary_c	secondary	series_update	
2	1967-	Y	N	Y	N	These rec	N	Oct-13				3 This serie	This serie	In Archive	Archives	Paper: Re PUB		03/2015
3	1966-	Y	N	Y	N	Dispositio	N	Feb-15				3 The Policy	The Policy	5 years.	Archives	Paper: Re PUB		
4	1976-2009	Y	N	Y	N	This dispo	N	Jul-90				3 Records d	Records d	3 years.	Archives	Paper: Re PUB		
5	1963-	Y	N	Y	N	These rec	N					3 These rec	This serie	Permanen	Archives	Paper: Re PUB		
6	1967-	Y	Y	N	N	These rec	N	Jul-90				3 Accepted	Accepted	until adm	Destroy	Paper: Re PUB		
7	1967-1972	N	N	N	N		N	Jun-96				3 These records are ac	7 years.	Destroy	Paper: Re PUB			
8	1980-2004	Y	N	N	N	This dispo	N	Aug-95	12/5/1990			3 These file These file	5 years.	Destroy	Paper: Re PRI		CON	
9	1980-	Y	N	Y	N		N	May-14	1/28/1992			3 Records n	Records n	Records not dupl	Archives	Paper: Re PUB		
10	1983-	Y	N	N	N	This dispo	N		1/28/1992			1 These file	These file	10 years.	Destroy	Paper: Re PUB		
11	1975-2003	Y	Y	N	Y	This dispo	N	Dec-92	2/28/1992			3 Complete	Complete	65 years a	Destroy	Paper: Re PRI		PUB
12	1985-	Y	N	N	N	This dispo	N	Jul-90	2/28/1992			3 Correspor	Correspor	3 years.	Destroy	Paper: Re PUB		
13	1989-2004	Y	N	N	N		N	Jun-95	2/28/1992			3 Records n	Records regarding St	Destroy	Paper: Re PUB			
14	1985-2004	Y	N	N	N	This dispo	N		2/28/1992			1 These file	These file	10 years.	Destroy	Paper: Re PUB		
15	1979-1983	Y	Y	N	N	This dispo	N	Jul-90	7/22/1992			3 These rec	These rec	7 years.	Destroy	Paper: Re PUB		
16	1961-	Y	N	Y	N	This dispo	N	Jun-95	8/25/1992			3 Records c	Records c	10 years.	Archives	Paper: Re PUB		PRI
17	1988-2003	Y	N	Y	N	This dispo	N	Jun-95	8/25/1992			3 Records c	Records c	5 years.	Archives	Paper: Re PUB		
18	1963-1977	Y	N	Y	N	These rec	N	Jul-90	9/23/1992			3 Holdings:	Holdings:	[1] Copy o	Archives	Paper: Re PUB		
19	1980-2004	Y	Y	N	N	This retain	N	Apr-00	2/8/1993			3 These file	These file	4 years a	Destroy	Paper: Re PRI		CON
20	1981-	Y	Y	N	Y	Retention	N	Jul-89				3 This serie	This serie	is a recon	Destroy	Paper: Re PRI		
21	1982-2009	Y	N	Y	Y	Retention	N	Jul-89				3 This serie	This serie	is a recon	Destroy	Paper: Re PRI		
22	1985-2004	Y	N	N	N		N	Dec-88				3 These file	These files	documen	Destroy	Paper: Re PRI		
23	1984-2004	Y	N	N	N		N	Dec-88				3 These are	These are	client rec	Destroy	Paper: Re PRI		
24	1984-	Y	Y	N	N		N	Dec-88				3 This is a c	This is a c	5 years a	Destroy	Paper: Re PRI		CON
25	1980-2004	Y	N	N	N	This dispo	N	Sep-96	2/7/1996			3 These file	These file	10 years.	Destroy	Paper: Re PRI		
26	1975-	Y	N	N	N	This dispo	N	Nov-96	8/16/1996			3 These file	These file	10 years.	Destroy	Paper: Re PRO		
27	1990-2009	Y	N	N	N	This dispo	N	Jul-90	7/21/1997			3 State empl	State empl	3 years	Destroy	Paper: Re PUB		
28	1990-	Y	Y	N	N	This dispo	N	Aug-15	8/19/1997			3 Files whic	Files whic	7 years.	Destroy	Paper: Re PUB		
29	1990-	Y	N	N	N	This dispo	N	May-14	10/21/1997			3 These file	These file	12 years.	Archives	Paper: Re PUB		
30	1998-	Y	N	N	N			Jul-90	5/11/2000			3 One copy	One copy	5 years.	Archives	Paper: Re PUB		

Series Formats by Agency

- Text report
- Query asks for:
 - Format type key
 - Agency number
 - Agency hierarchy levels 1 through 2
 - Storage location (1st occurrence)
- Sort by:
 - Agency name
 - Series title
 - Format type key
- Data includes:
 - Format type
 - Series number
 - Series title
 - Agency short name

The screenshot shows a Microsoft Access application window titled "Series Formats by Agency". The window has a standard Windows-style title bar and menu bar. The main area displays a table of data with the following columns: Form, Series#, Short Title, Type Level, and Number. The data consists of approximately 40 rows of records, each detailing a specific series format. The "Type Level" column contains values like "Approved monthly retention and class" and "Information Fractious Act training". The "Number" column contains values such as "84568", "23512", and "13748". The "Short Title" column contains values like "Archives and Records Serv.", "Archives and Records Serv.", and "Archives and Records Serv.". The "Form" column contains values like "SAP serice", "SAP serice", and "SAP serice".

Form	Series#	Short Title	Type Level	Number
SAP serice	84568	Approved monthly retention and class Archives and Records Serv.		
SAP serice	23512	Commemorative resolutions Archives and Records Serv.		
SAP serice	23518	Harold Jacobson funeral program Archives and Records Serv.		
VIS serice	22068	Information Fractious Act training Archives and Records Serv.		
SAP serice	23512	Lizas Peagland oral history Archives and Records Serv.		
CAS serice	23512	Lizas Peagland oral history Archives and Records Serv.		
CDF serice	23512	Lizas Peagland oral history Archives and Records Serv.		
SAP serice	84562	Records Center shelf inventory Archives and Records Serv.		
SAP serice	21853	Research Contact records retrieval I Archives and Records Serv.		
SAP serice	3093	State records survey data Archives and Records Serv.		
VIS serice	23511	Television interviews Archives and Records Serv.		
MHS serice	86578	Veterans buried in Utah index Archives and Records Serv.		
SAP serice	13758	Administrative assistant's subject Archives and Records Services		
SAP serice	9081	Administrative correspondence Archives and Records Services		
MHS serice	3981	Administrative correspondence Archives and Records Services		
SAP serice	13748	Agency and processess series name f1 Archives and Records Services		
SAP serice	21208	Agency histories Archives and Records Services		
CDF serice	21208	Agency histories Archives and Records Services		
SAP serice	21208	Agency history questionnaires Archives and Records Services		
SAP serice	21148	Agency history research records Archives and Records Services		
SAP serice	21118	Agency record official name reports Archives and Records Services		
SAP serice	25437	Agency records management files Archives and Records Services		
CDF serice	25437	Agency records management files Archives and Records Services		
SAP serice	7208	Annual leave compilation card Archives and Records Services		
SAP serice	11578	Annual reports Archives and Records Services		
MHS serice	11578	Annual reports Archives and Records Services		
MHS serice	11578	Annual reports Archives and Records Services		
SAP serice	9987	Archives building planning records Archives and Records Services		
MHS serice	9987	Archives building planning records Archives and Records Services		
MHS serice	9987	Archives building planning records Archives and Records Services		
MHS serice	9987	Archives building planning records Archives and Records Services		
MHS serice	9987	Archives building planning records Archives and Records Services		
MHS serice	86578	Archives correspondence index Archives and Records Services		
CDF serice	86578	Archives correspondence index Archives and Records Services		

Series in Custody by Agency

- Text report
- Query asks for:
 - Agency hierarchy levels 1 through 5
 - Primary location of series
 - State Records Committee date

- Series cataloged date
 - Agency number range
 - Format retention accumulation time
 - Agency type
 - Is this a general schedule, not a series checkbox
- Sort by:
 - Agency hierarchy levels 1 through 5
 - Agency name
 - Agency number
 - Series title
- Data includes:
 - Agency short name
 - Agency number
 - Series title with dates
 - Series number
 - Volume processed (cubic feet and number of reels)
 - Whether or not processed

SERIES TITLE AND DATE	SERIES NUMBER	VOLUME	REELS
Administrative records, 1910-1920.	I83	0.1 cu ft 0.1 reel	Y
Coal storage investigation records, 1917.	I1882	0.2 cu ft 1.0 reel	Y
Legislative bills records, 1917, 1919.	I2381	0.4 cu ft 1.0 reel	Y
Hammock dam failure records, 1917.	I1881	0.2 cu ft 1.0 reel	Y
Veteran rights and irrigation records, 1918.	I88	0.1 cu ft 1.0 reel	Y

Series in Custody by Subject

- Text report
- Query asks for:
 - Subject title range
 - Agency hierarchy levels 1 through 5

- Agency number
- No sort, default is alphabetical by subject
- Data includes:
 - Subject term
 - Agency long name
 - Series title, with series dates
 - Series number
 - Series volume



Series Not SRC Approved

- Text report
- Query asks for:
 - Analyst assigned to agency
 - When series was added date range
 - Is this a general retention schedule, not a series checkbox
 - Series security level
- Sort by:
 - Agency number
 - Series number
 - Records analyst assigned to agency
- Data includes:
 - Series number
 - Series title

- When series was added
- Agency number
- Records analyst assigned to agency

Series Short Number	Series Title	When Added	Agency Analyst
28872	Government Records Access and Management	09/18/2014	11 kB
28873	Archives Month records	11/03/2014	11 kB
28877	Military reconnaissance survey maps	01/12/2014	11 kB
28825	Vendor setup records	02/04/2014	22 kB
28834	Vendor tax records	02/04/2014	22 kB
28837	Vendor Electronic Funds Transfer (EFT)	02/04/2014	22 kB
28727	Informal administrative hearing record	07/02/2013	27 kB
28543	Administrative Hearing records	07/03/2014	30 kB
28844	Workers compensation case files	04/17/2014	41 kB
28821	Federal grant financial records	02/12/2014	67 kB
28845	Photographs	02/10/2014	78 kB
28472	Subdivision name files and maps	02/17/2014	103 kB
28738	City Attorney's Disconnection Litigation	07/17/2014	103 kB
28129	Publications	06/16/2014	182 kB
28858	Administrative meeting minutes	07/11/2014	182 kB
28888	Disaster Mitigation Assistance	05/05/2015	182 kB
28881	Operational Activities	05/07/2015	182 kB
28882	State Emergency Management (DEM) Com.	05/12/2015	182 kB
28883	Emergency Management Assistance Com.	05/12/2015	182 kB
28884	Emergency Management Accreditation	05/12/2015	182 kB
28885	Emergency 900s and checklists	05/12/2015	182 kB
28886	Disaster plan records	05/12/2015	182 kB
28887	State DEM/Deg of Homeland Securit.	05/12/2015	182 kB
28888	Dash Native American Tribal Activism	05/12/2015	182 kB
28889	Employee Training	05/12/2015	182 kB
28701	Flood Mapping	05/12/2015	182 kB
28702	Social Media	05/12/2015	182 kB
28703	Multimedia	05/12/2015	182 kB
28704	Division Committees/Boards	05/12/2015	182 kB
28714	Ordinances	06/03/2015	190 kB
28715	Resolutions	07/07/2015	190 kB
28736	Articles of Incorporation files	07/16/2015	190 kB
28735	Board of Adjustment minutes	09/16/2015	190 kB
28778	Municipal Building Authority minutes	09/16/2015	190 kB

Series Linked to GRS by Date

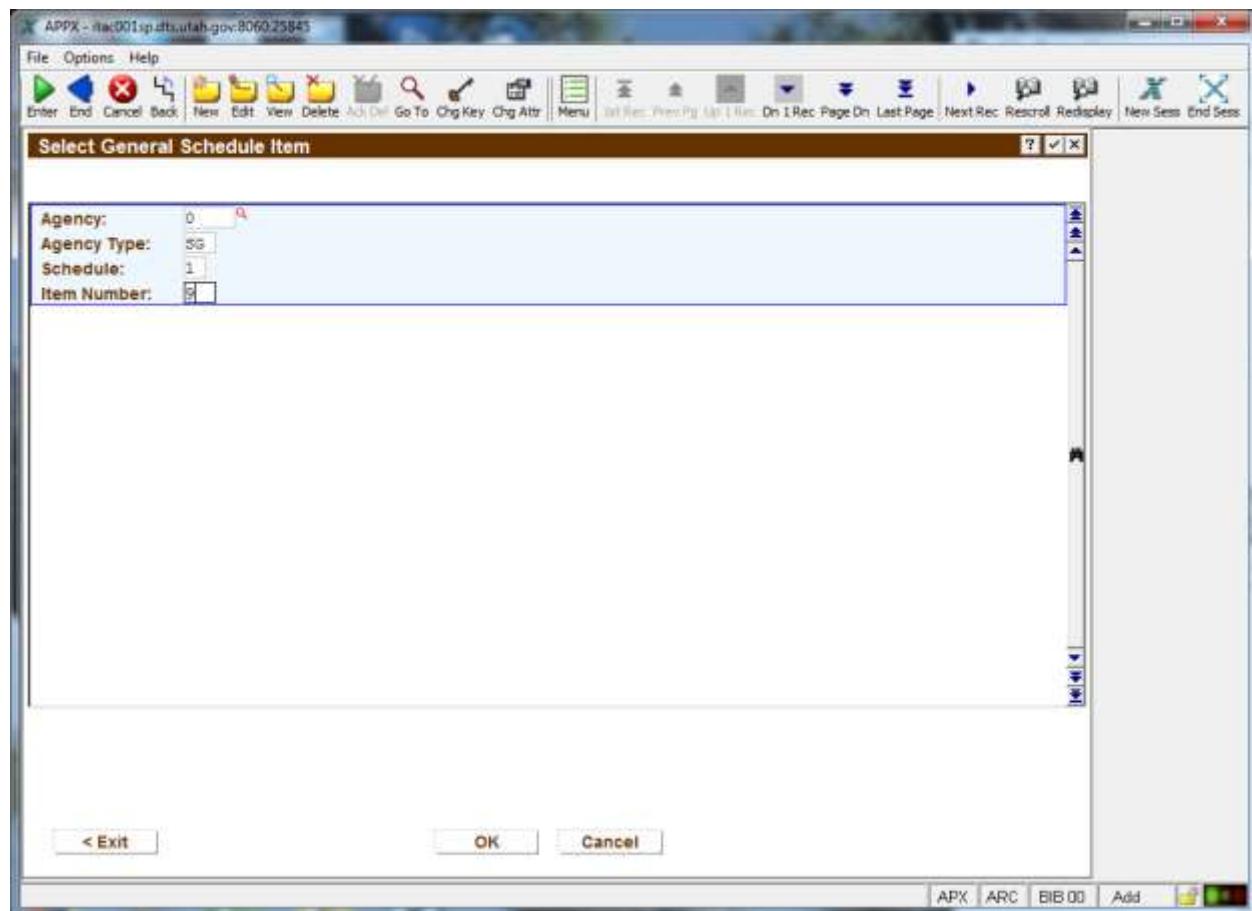
- Text report
- Query asks for link date range
- No sort, defaults chronological
- Data includes:
 - Month and year
 - Total number of series linked during that time frame
 - Total links made in a given year

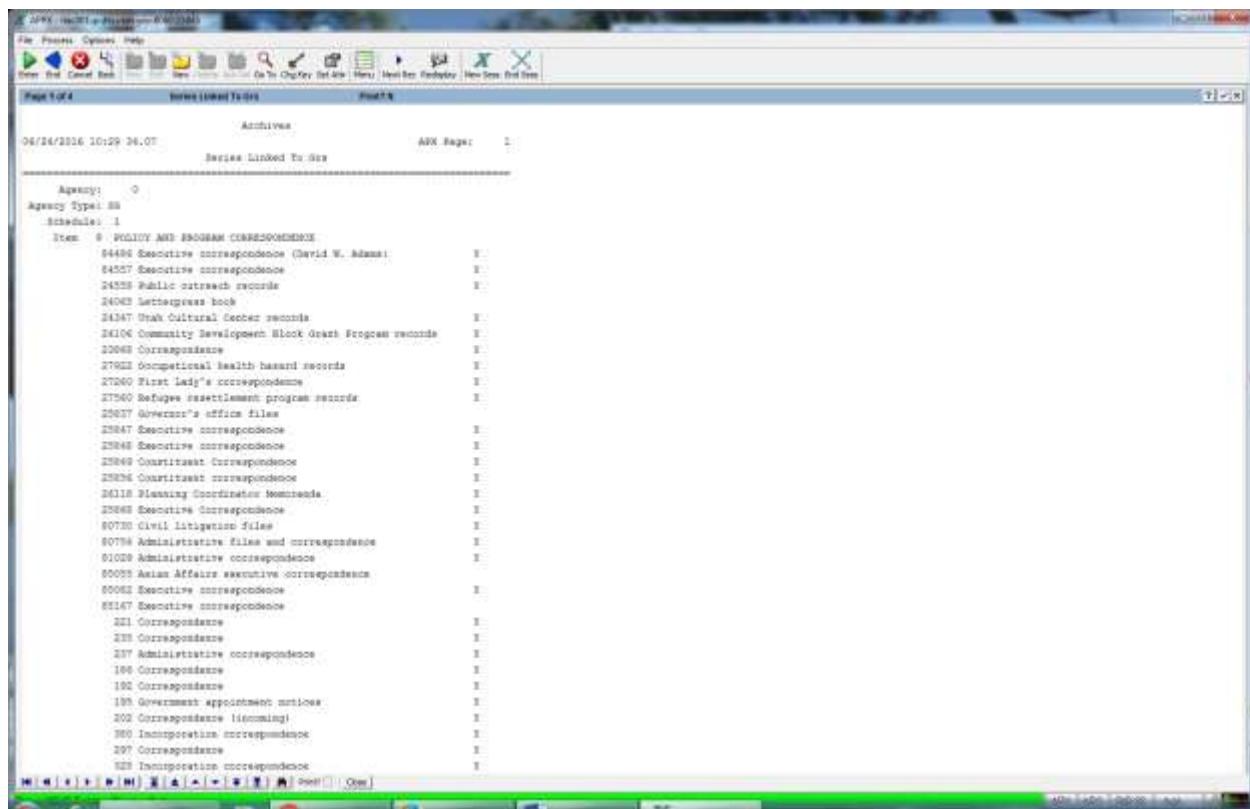
The screenshot shows a software interface with a menu bar (File, Process, Options, Help) and a toolbar with various icons. The main window title is "APX - Radcliffe - Archives". The date "04/26/2016 10:12:28,61" is displayed at the top left. The table contains two sets of data, separated by a horizontal line:

	Archives	ARX Pages
January, 2015	27	
February, 2015	27	
March, 2015	448	
April, 2015	31	
May, 2015	221	
June, 2015	31	
July, 2015	421	
August, 2015	31	
September, 2015	265	
October, 2015	12	
November, 2015	32	
December, 2015	36	
2015	1,871	
January, 2016	88	
February, 2016	178	
March, 2016	87	
April, 2016	36	
May, 2016	334	
June, 2016	27	
2016	108	

Series Linked to GRS Item

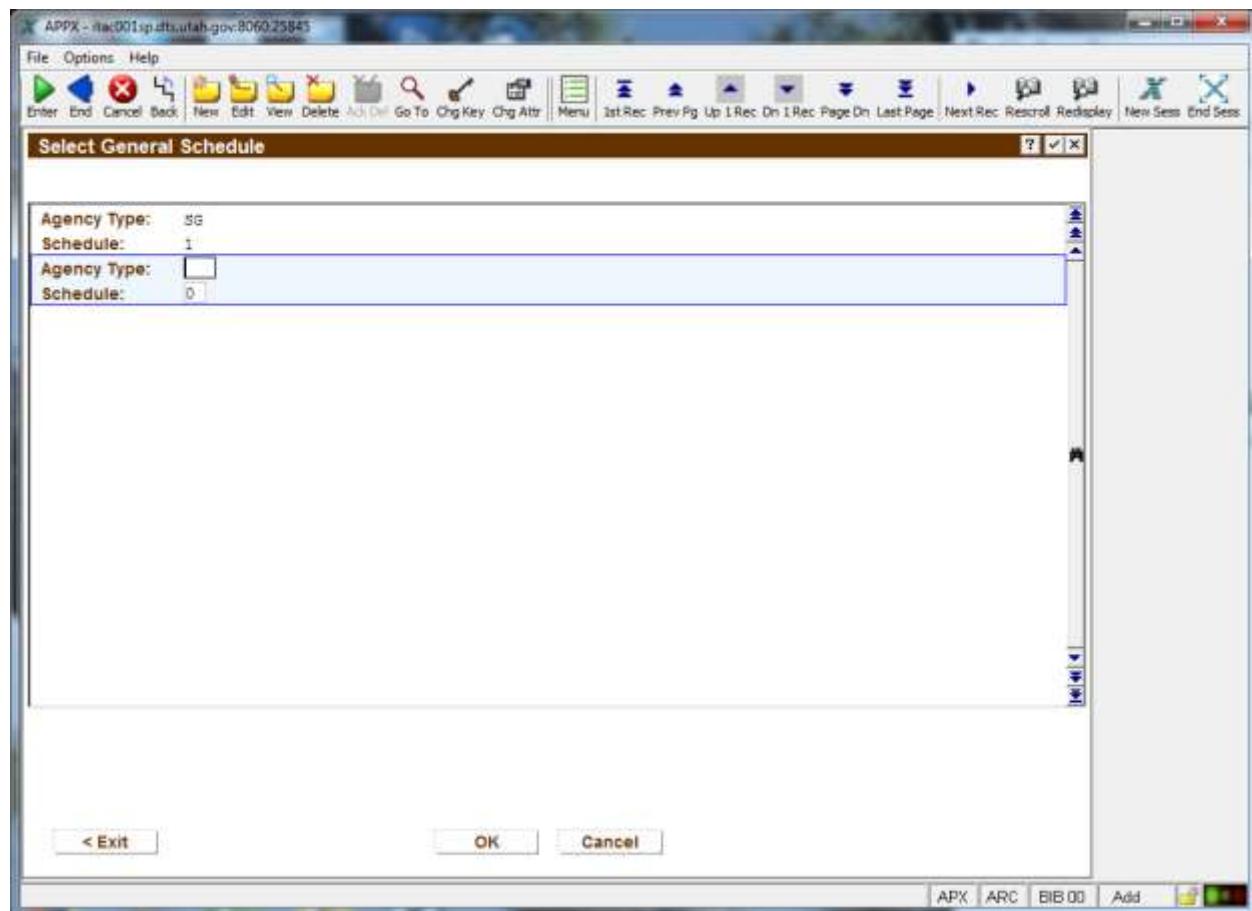
- Text report
- Query is an input process, asks for:
 - Agency number
 - Agency type
 - Schedule number
 - Item number
- No sort
- Data includes:
 - Agency key
 - Agency type
 - Schedule number
 - Item number
 - Item title
 - Series number
 - Series title
 - Y/N flag indicating if boxes exist for the series

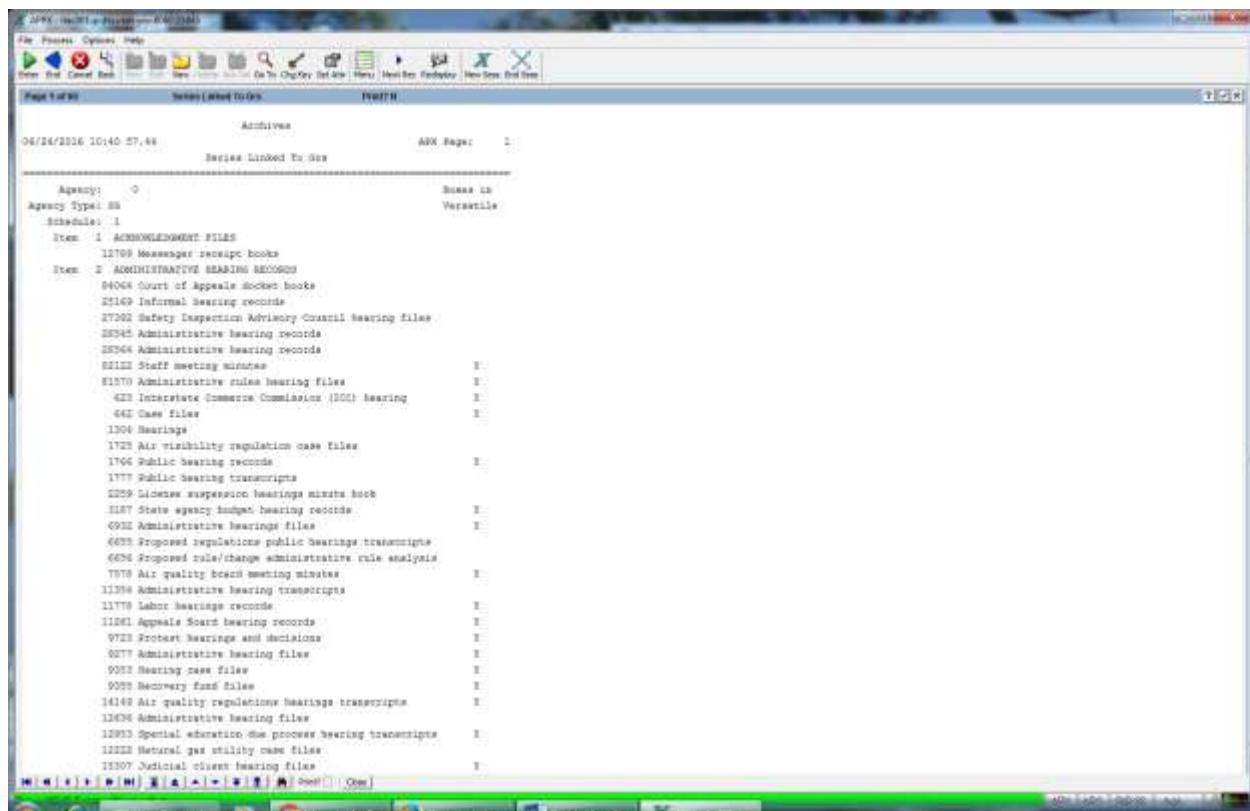




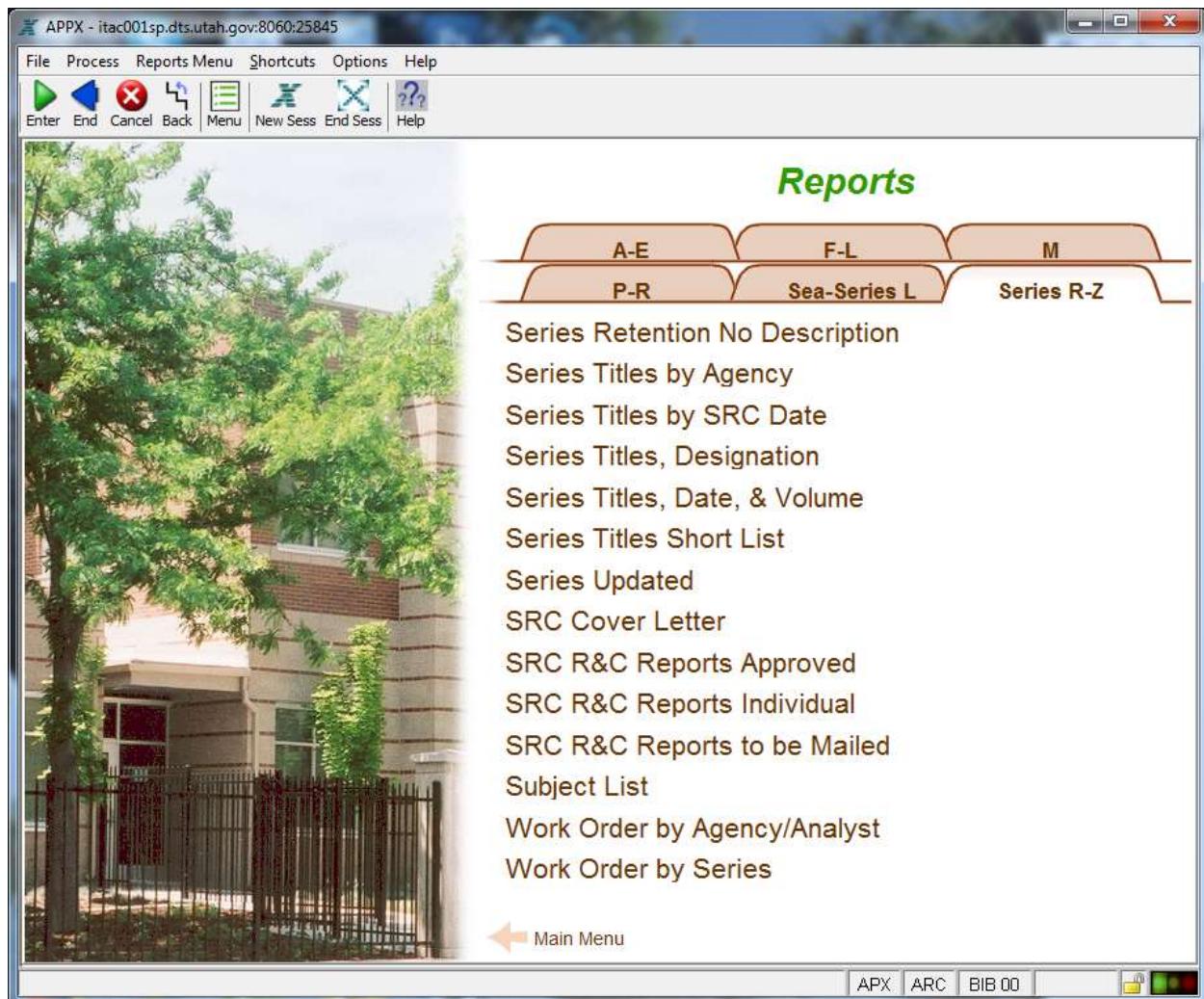
Series Linked to GRS Schedule

- Text report
- Query is an input process, asks for:
 - Agency type
 - Schedule number
- No sort, default is numerical by item number
- Data includes:
 - Agency number
 - Agency type
 - Schedule number
 - Item number
 - Item title
 - Series number
 - Series title
 - Y/N flag indicated the existence of boxes for the series



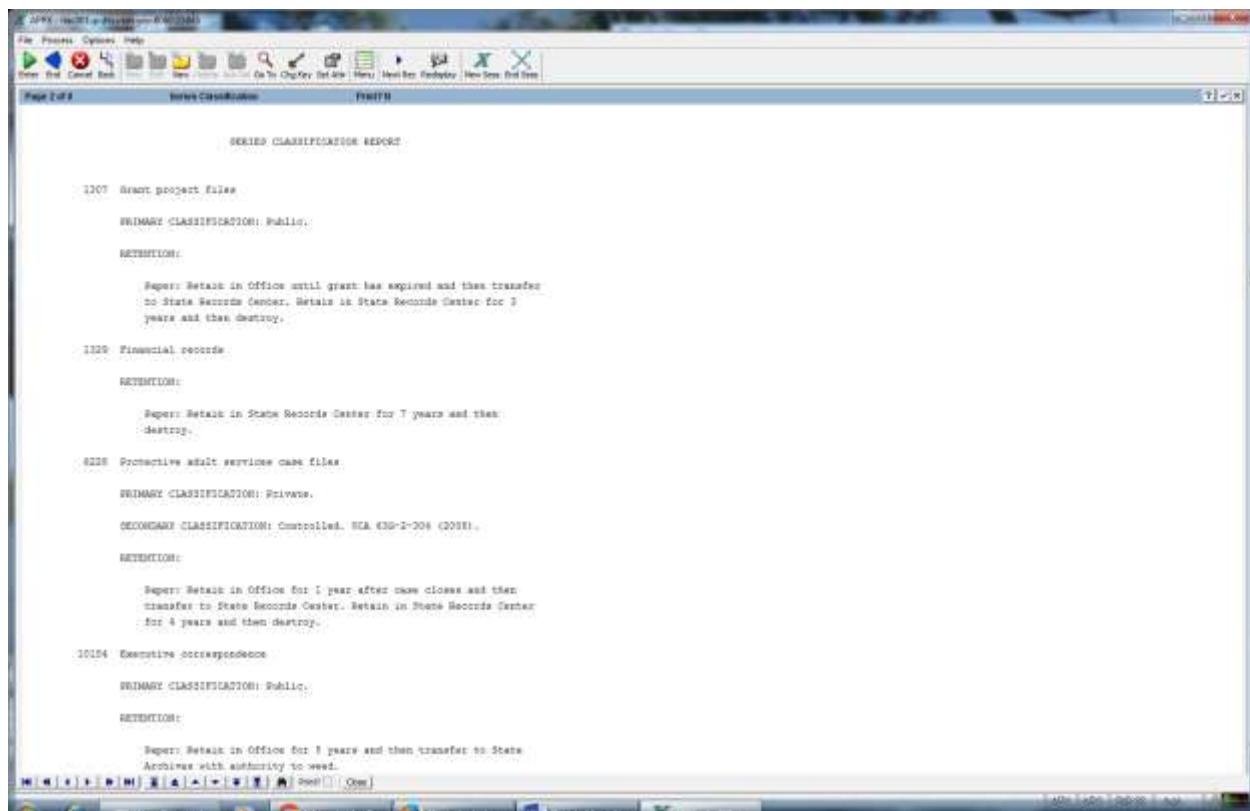


Click on the Series R-Z tab of the Reports menu.



Series Retention No Description

- Text report
- Query asks for:
 - Agency number
 - Agency hierarchy levels 1 through 5
- Sort by:
 - Agency hierarchy levels 1 through 5
 - Agency official name
 - Series number
 - Series title
- Data includes:
 - Agency long name
 - Series number
 - Series title
 - Primary designation/classification
 - Secondary designation/classification
 - Format management retention statements



[Bug report: the resulting report appears to have little in common with the label it has been given on the menu. Should the optional process be tied to a different report instead, such as BIBLGRPC MISSING DATA?]

Series titles by Agency

- PDF report
- Query asks for (with a Page Down requirement):
 - Agency hierarchy levels 1 through 5
 - Agency number range
 - State Records Committee approved checkbox
 - Series catalogued date range
 - Series catalogued before checkbox
 - Agency type
 - Is this a general retention schedule, not a series
 - Agency dissolved date
 - Whether agency is defunct (defaults to not equal to checked)
 - Series dates (defaults to excludes a period)
- Sort by:
 - Agency hierarchy levels 1 through 5
 - Work alpha 35 field (unknown content)
 - Series title
 - Series number
- Data includes:

- Agency long name for each level of the agency hierarchy
- Series number
- Series title

Archives
Series Titles By Agency

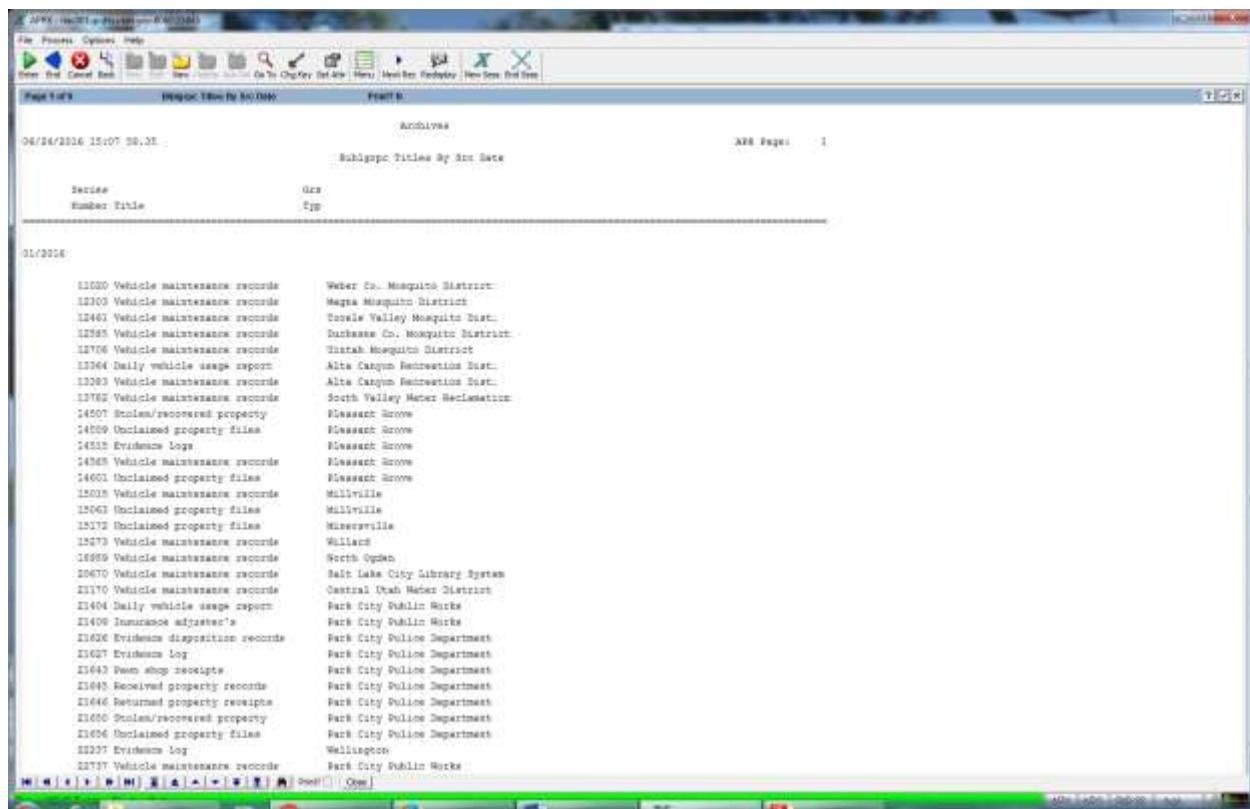
Page: 1
06/24/16 14:55
APX

Department of Human Services. Division of Aging and Adult Services
Division of Aging and Adult Services

1264	Administrative records
25628	Annual Governor's Centenarian Celebration records
83851	Annual reports
19391	Chronological files
19080	Contract files (AAA's)
17234	District contract files
10154	Executive correspondence
1307	Grant project files
10155	Information memorandums and program instruction records

Series Titles by SRC Date

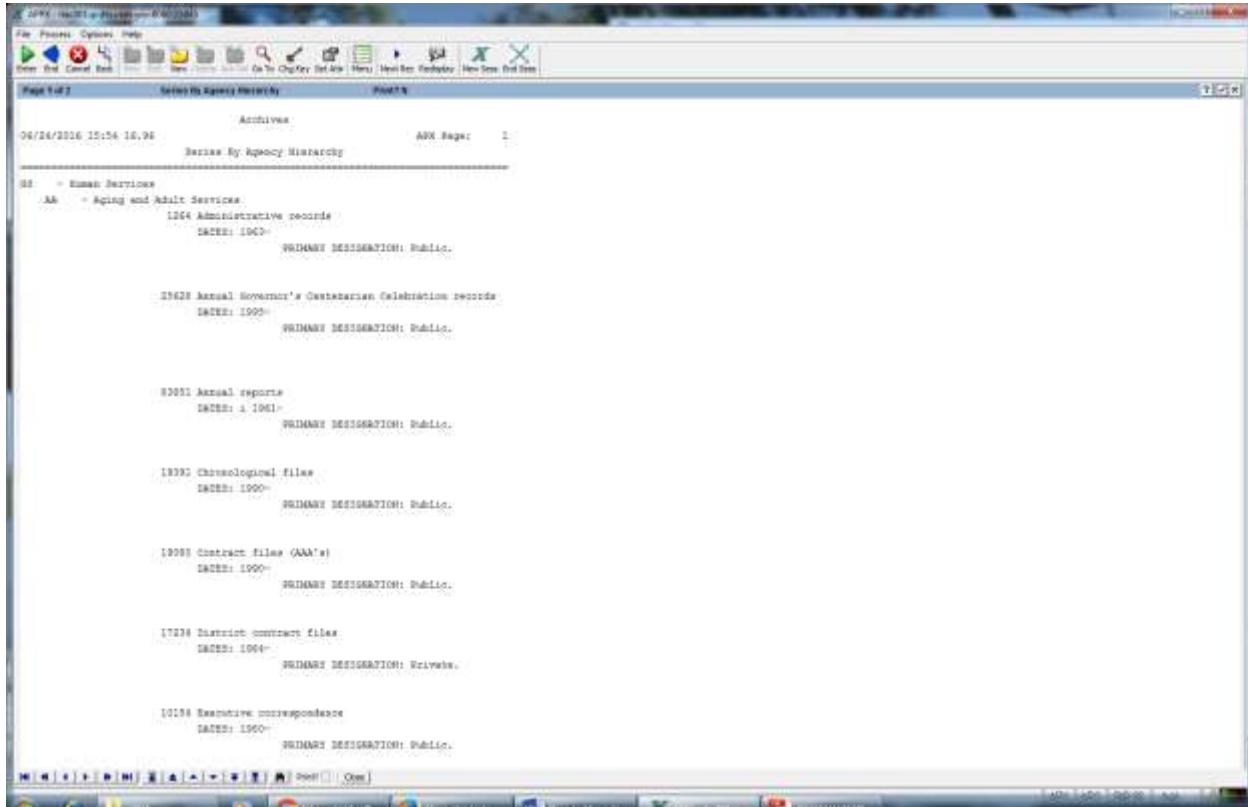
- Text report
- Query asks for State Records Committee date range
- Sort by State Records Committee date
- Data includes:
 - Month State Records Committee approved the retention
 - Series number
 - Series title
 - Agency short name



Series Titles, Designation

- Text report
- Query asks for (with a Page Down requirement):
 - Agency hierarchy levels 1 through 5
 - Agency number range
 - State Records Committee approved checkbox
 - Series cataloged date range
 - Series cataloged before checkbox
 - Agency type
 - Is this a general retention schedule, not a series
 - Agency dissolved date
 - Whether agency is defunct (default is not equal to checked)
 - Series dates (default excludes period)
- Sort by:
 - Agency hierarchy levels 1 through 5
 - Work alpha 35 field (data unknown)
 - Series title
 - Series number
- Data includes:
 - Agency hierarchy code
 - Agency code name
 - Series number
 - Series title

- Series dates
- Primary designation/classification



Series Titles, Date, & Volume

- Text report
- Query asks for (with a Page Down requirement):
 - Agency number
 - Agency type
 - Agency hierarchy levels 1 through 3
 - Series number
 - Series title range
 - Cataloged date range
 - Series cataloged before checkbox
 - Series processed date range
 - Series processed by
 - State Records Committee approved checkbox
 - State Records Committee date range
 - Series in Archives custody checkbox
 - Is this a general schedule, not a series checkbox
 - Series considered scheduled checkbox
 - Date retention was set
- Sort by:
 - Agency number

- Agency name
 - Work alpha 35 field (unknown data)
 - Series number
- Data includes:
 - Agency number
 - Agency official name (cut off)
 - Series dates
 - Series number
 - Series title
 - Whether cataloged (aka RLIN Y/N)
 - Cataloged date
 - State Records Committee date
 - Volume
 - Date retention was set

Series By Agency with Date and Volume					
Archives					
04/26/2016 16:11:30,98		APX Page:	1		
<hr/>					
11 - Department of Administrative Services,Subdivision of Archives and					
Date: 1909-1997; 2010-2015.	Proc-by:	RLIN # Date	SRE:	02/2000	
13750 - Administrative assistant's subject		Volume:			
				Retention was set on: 11/10/1998	
Date: 1975-	Proc-by:	RLIN # Date	SRE:	04/2014	
3885 - Administrative correspondence		Volume: 0.8 cu ft			
				Retention was set on: 11/06/2014	
Date: 1904-2000.	Proc-by:	RLIN # Date	SRE:	12/1998	
13745 - Agency and processed series case file		Volume:			
				Retention was set on: 11/10/1998	
Date: 1905-	Proc-by:	RLIN # Date	SRE:	10/2013	
13234 - Agency histories		Volume:			
				Retention was set on: 11/10/1998	
Date: 1906-2012.	Proc-by:	RLIN # Date	SRE:	04/1999	
13112 - Agency history questionnaires		Volume:			
				Retention was set on: 11/17/1998	
Date: 1906-2016.	Proc-by:	RLIN # Date	SRE:	04/2013	
13146 - Agency history research records		Volume:			
				Retention was set on: 11/16/1998	
Date: 1900-2000.	Proc-by:	RLIN # Date	SRE:	07/1990	
13124 - Agency record official name reports		Volume:			
				Retention was set on: 11/21/1998	
Date: 1904-2016.	Proc-by:	RLIN # Date	SRE:	07/2004	
13437 - Agency records management files		Volume:			
				Retention was set on: 11/03/2004	
Date: 1.1909-2003.	Proc-by:	RLIN # Date: 12/05/1995	SRE:	07/1988	
1316 - Annual leave compilation card		Volume: 0.2 cu ft			
				Retention was set on: 11/16/1998	

Series Titles Short List

- Text report
- Query asks for:
 - Agency number
 - Whether the agency is eligible for inclusion in Versatile based upon retention of formats
- Sort by:
 - Agency number
 - Series number

- Series title
- Data includes:
 - Agency number
 - Agency long name
 - Series number
 - Series title

SERIES NUMBER	TITLE	DESCRIPTION
3	Department of Human Services, Division of Aging and Adult	
1327	Publications	
1328	Policy and procedure manuals	
1328	Work program reports	
1328	Administrative records	
1329	Grant project files	
1329	Financial records	
1329	Protective adult services case files	
13294	Executive correspondence	
13295	Information memorandum and program instruction records	
13297	Personnel files for permanent employees	
13298	Travel and transportation files	
13299	Daily activity schedules	
13299	Staff agenda and meeting minutes	
13299	Fiscal review records	
13299	State board meeting records	
13299	Advisory council meeting minutes	
13299	Accolades publications 1989-1977	
13299	Aging and adult services case files	
13299	Outpatient case files	
13299	Sub-state outpatient case files	
13299	Adult day care complaint files	
13299	Citizen committee files	
13299	District contract files	
13299	Citizen case files	
13299	Investigations files	
13299	Time and attendance reports	
13299	Contract files (AAA's)	
13299	(Chronological files)	
13299	Training aids (Adult Protective Services)	
13299	Financial information network (FINET) reports	
13299	Annual Governor's Commencement Celebration records	
81026	Title XX program files	
81026	Model project files	
82009	Outpatient master complaint log	
82009	Nursing home cards file	
81051	Annual reports	

Series Updated

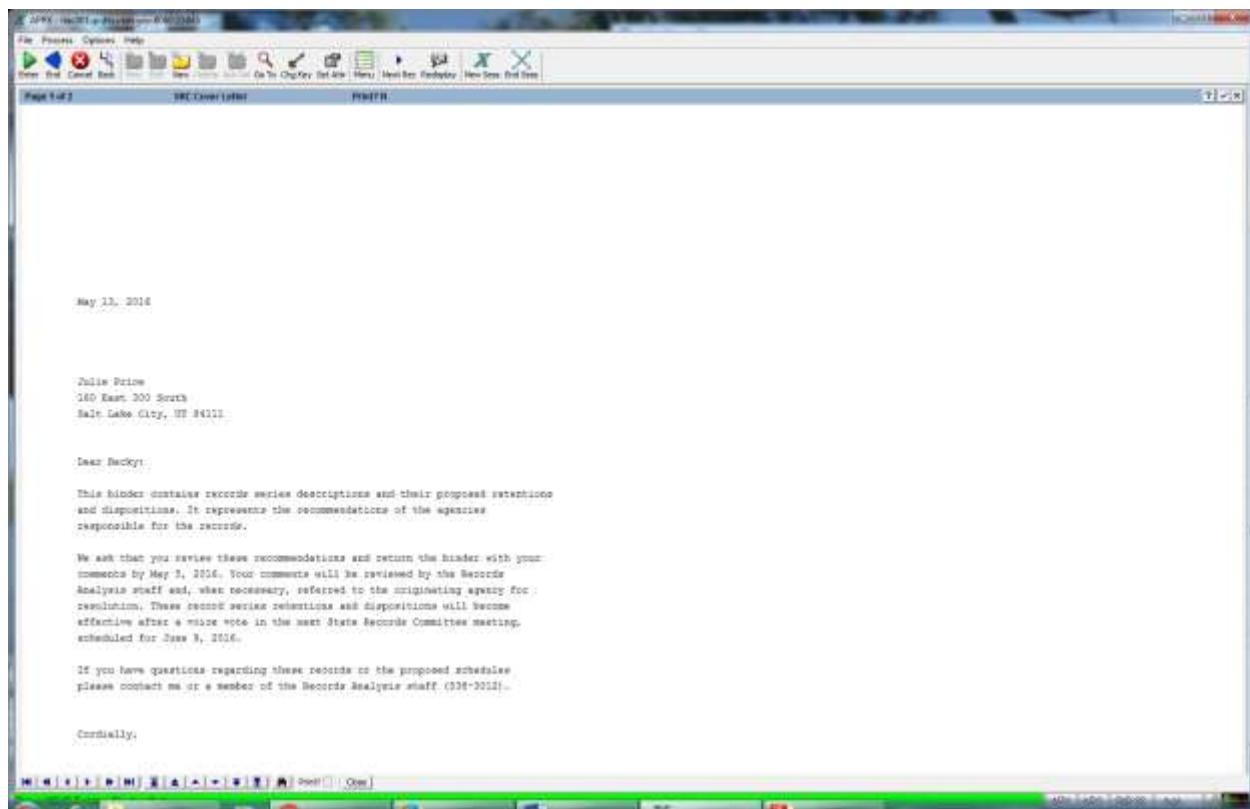
- PDF report
- Query asks for:
 - Series updated date range
 - Person who updated series
 - Series number (aka bibliographic record id)
 - Agency type
- Sort by:
 - Date updated
 - User updated
 - Series number
- Data includes:
 - Series number
 - Series title
 - Date updated
 - User updated

Archives
Retention Schedule Updates

Biblgrp Rid	Short Title	Date Updated	Us Upd
21226	Internal administrative correspondence	01/2016	KMY
26582	Toxicology batch files	01/2016	LPO
27784	Adverse action investigation files	01/2016	LPO
28806	Building permits	01/2016	LPO
2992	Publications	01/2016	RG
7707	Superfund sites environmental monitoring	01/2016	RG
10303	Drug enforcement administration plans	01/2016	RG
10307	Unit controlled substance order files	01/2016	RG
10311	Controlled substance biennial inventories	01/2016	RG
13669	Purchase orders	01/2016	RG
13669	Purchase orders	01/2016	RG
13670	Purchase requisitions	01/2016	RG
23654	Accounts payable records	01/2016	RG
26126	Invoices	01/2016	RG
26423	Budget information files	01/2016	RG
27694	Policies and procedures manuals	01/2016	RG
28468	Administrative correspondence	01/2016	RG

SRC Cover Letter

- Text report
- Query asks for SRC panel member key
- Sort is by SRC panel member key
- Data includes:
 - A letter to the State Records Committee member outlining when submitted retention schedules should be returned after the monthly review.



SRC R&C Reports Approved

- PDF report
- Query asks for State Records Committee meeting key [Bug report: no data lookup on that field]
- No sort
- Data includes:
 - Agency name
 - Agency address
 - Records officer name
 - Series number
 - Series title
 - Statement that the retention schedules have now been approved by the State Records Committee as of <date>
 - Signature line of State Records Committee executive secretary
 - Series dates
 - Series arrangement
 - Series schedule description
 - Series total retention
 - Series disposition
 - Format management retention statements
 - Appraisal values
 - Appraisal text
 - Primary designation
 - Secondary designation(s)

Utah State Archives

Parent Agency:

Agency: Department of Technology Services
1 State Office Building, FL 6
Salt Lake City, UT 84114

Records Officer: Stephanie Weiss

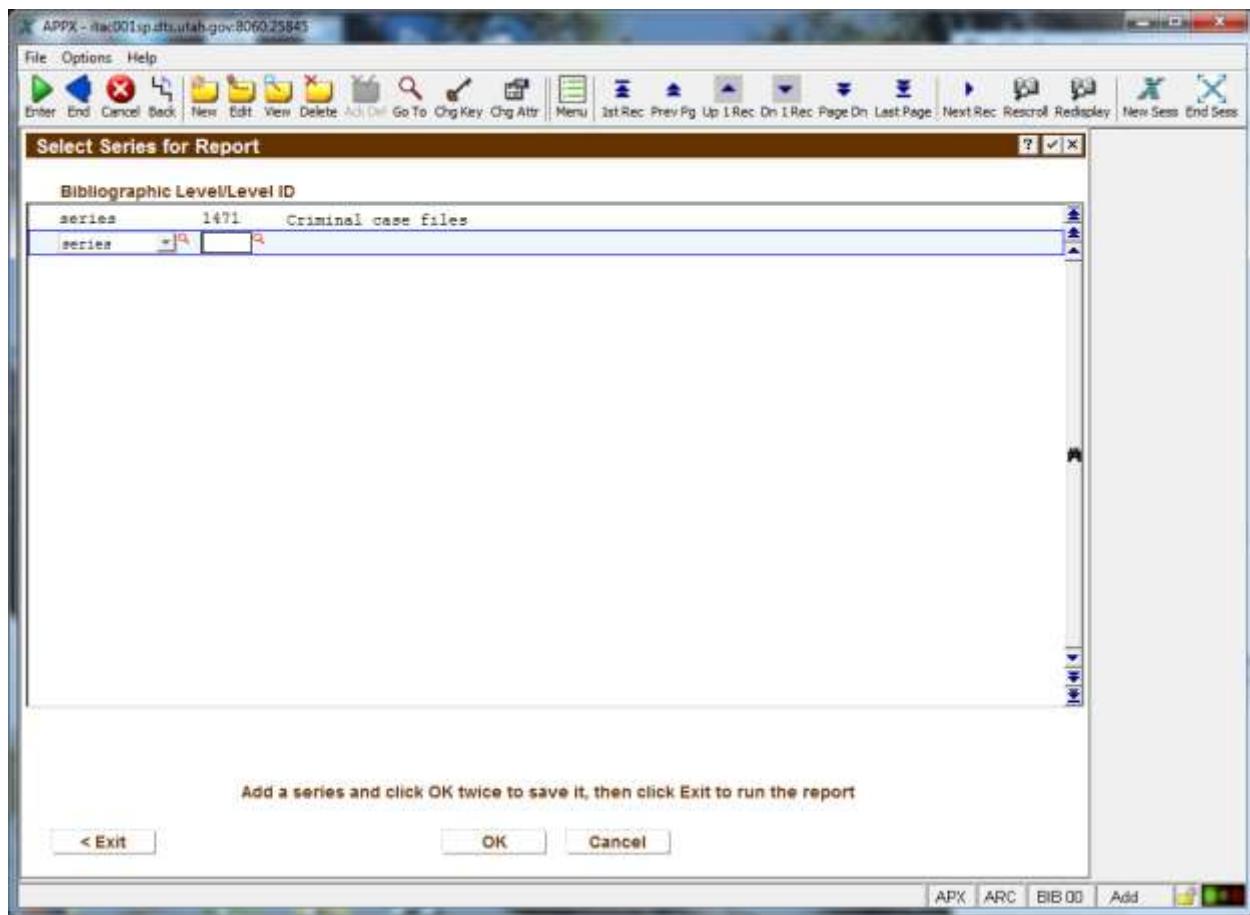
83970 Policies and procedures manuals

Destroying records in accordance with this agency Retention Schedule is in compliance with the Archives and Records Service and Government Records Access and Management Act (UCA 63-2-101 et seq.).

The Agency classifies its records under provisions of the Government Records Access and Management Act (UCA 63-2-101 et seq.). Classifications have not been approved by the State Records Committee.

SRC R&C Reports Individual

- PDF report
- Query is an input process that asks for one or more series numbers
- No sort
- Data includes:
 - Agency name
 - Agency address
 - Records officer name
 - Series number
 - Series title
 - Statement that the retention schedules have now been approved by the State Records Committee as of <date>
 - Signature line of State Records Committee executive secretary
 - Series dates
 - Series arrangement
 - Series schedule description
 - Series total retention
 - Series disposition
 - Format management retention statements
 - Appraisal values
 - Appraisal text
 - Primary designation
 - Secondary designation(s)



Utah State Archives

Parent Agency: Judicial Council
Court Administrators Office
Statehood 3rd district court

Agency: District Court (Third District : Salt Lake County)
450 South State
P.O. Box 1860
Salt Lake City, UT 84111
435-238-7407

Records Officer

01471 Criminal case files

Destroying records in accordance with this agency Retention Schedule
is in compliance with the Archives and Records Service and Government
Records Access and Management Act (UCA 63-2-101 et seq.).

Export PDF

Selected Export PDF

Selected PDF file: 01471C01.pdf

Current to: Microsoft Word Document

Document language: English (US) - English

Create

Create PDF

Edit PDF

Comment

Control Risk

Fill & Sign

Send for Signature

Send & Track

Show and share files in this document cloud

SRC R&C Reports to be Mailed

- PDF report

- Query is an input process asking for the mailing date
- No Sort
- Data includes
 - Same as other retention and classification/designation reports
 - Includes a total at the end of all series being submitted and their total volume

JULY 15, 2016

AGENCIES SUBMITTING RECORD SERIES

AGENCY	NUMBER OF RECORD SERIES
STATE AGENCIES	
Administrative Services Archives and Records Service.....	1
TOTAL RECORD SERIES SCHEDULED:	1
TOTAL VOLUME:	0.00
TOTAL ANNUAL ACCUMULATION:	0.00
CUBIC FEET	

I have read the enclosed record series and concur with proposed retentions
and dispositions, except for any noted substantive changes.

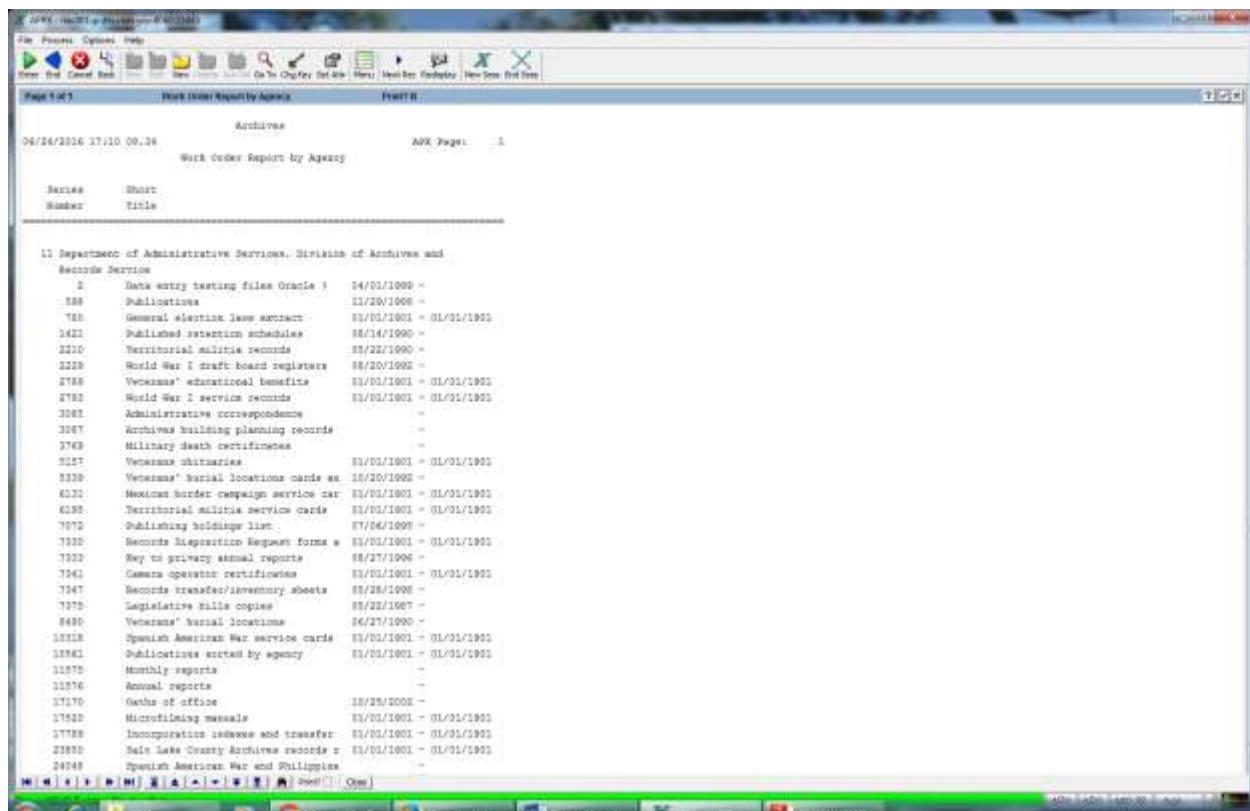
Subject List

- Text report
- Query asks for subject title range
- No sort, defaults to alphabetical by subject term
- Data includes:
 - Subject term
 - MARC code associated with subject term
 - Subject term key

Subject Listing		Print
06/26/2016 17:02 40.61	Archives	ARX Page: 1
	Subject Listing	
Abandonment of property	3333	
650		
Abortion	3169	
650		
Abstaining	1004	
650		
Abstracts	6456	
free-floating subdivision--only form subdivision by		
Abstracts of title	13	
650		
82 Land titles		
82 Real property		
82 Abstracts of title		
82 Abstracts of title		
82 Insolvency		
82 Deeds		
Abused children	4663	
Academic workload	2001	
use only as a subfield with students; Students--Academic workload; for teachers, it's Teachers--workload.		
Accidents	2429	
650, #=topical subdivision under 610--corporates entry and 651--geographic entry.		
Accounting	364	
Used only as a subdivision: 490, 651, 610		
Accreditation	1032	
650		

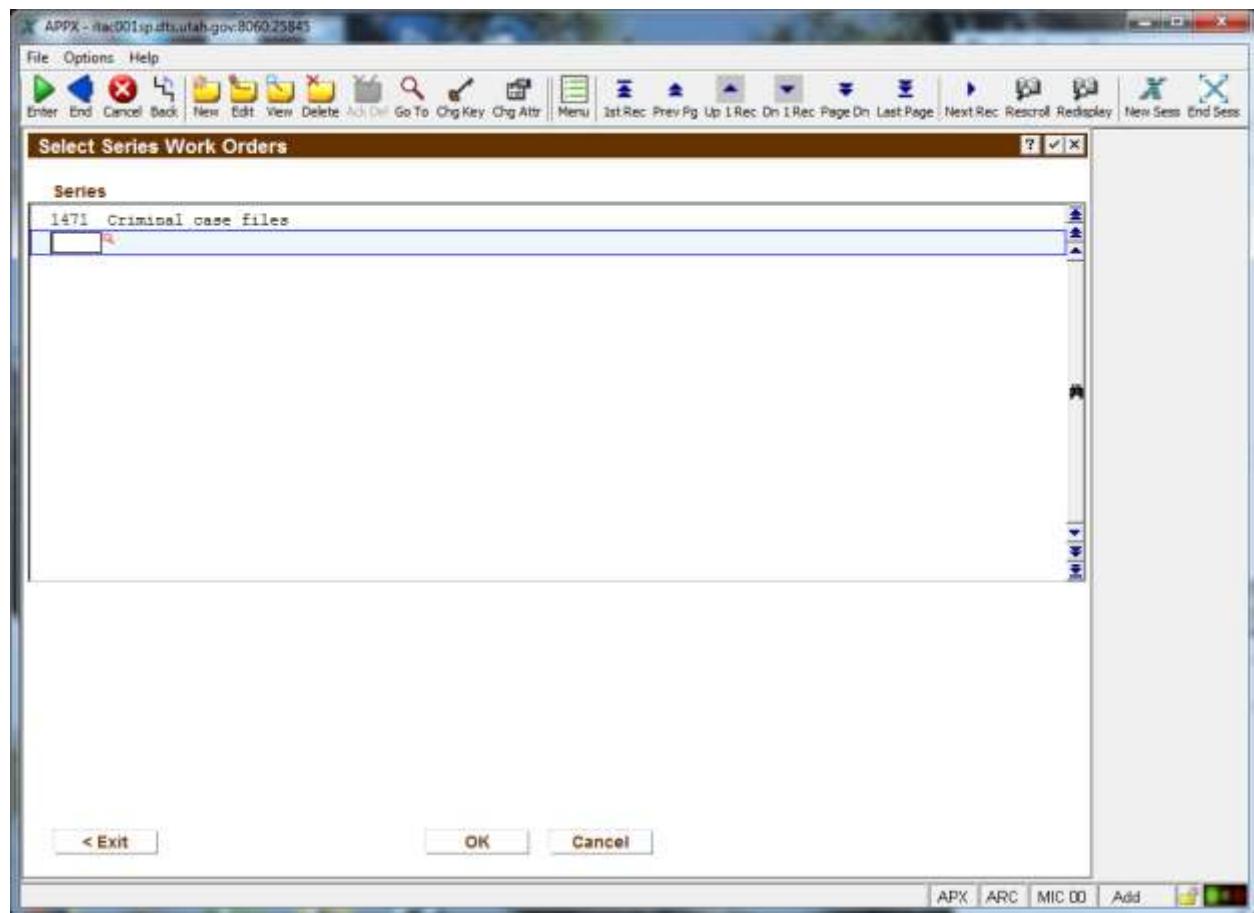
Work Order by Agency/Analyst

- Text report
- Query asks for:
 - Analyst assigned to agency
 - Agency number range
 - Series number range
 - Work order begin date
 - Work order end date
- Sort by:
 - Agency number
 - Series number
- Data includes:
 - Agency number
 - Agency name
 - Series number
 - Series title
 - Work order begin date
 - Work order end date



Work Order by Series

- Text report
- Query is an input process asking for one or more series numbers
- No sort



[Bug report: running a series returns no data, takes user back to the menu.]