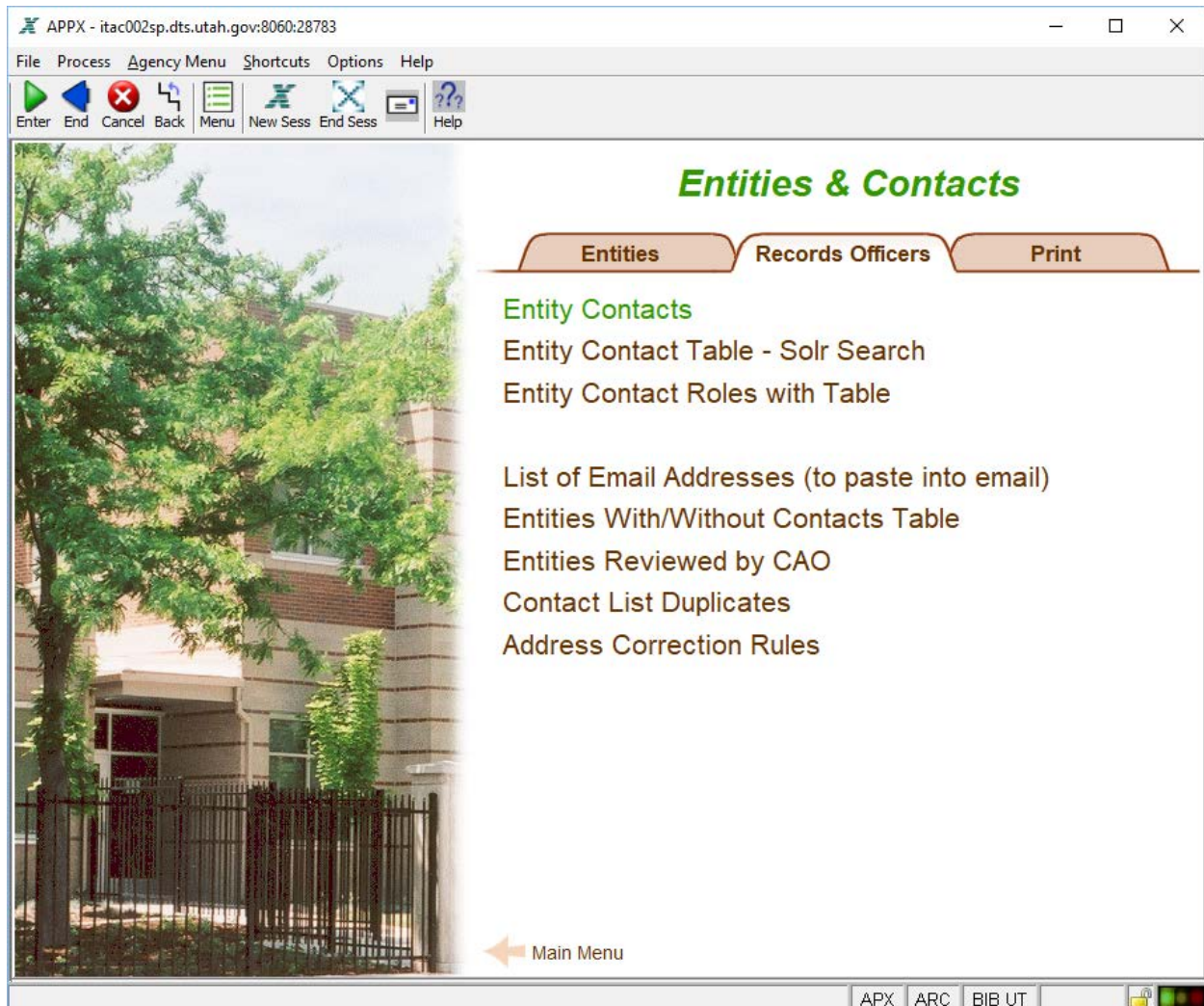


## Entity Contacts

June 7, 2018

The way to edit records in our mailing list has changed. You may access the mailing list directly by clicking Entity Contacts on the Entities Menu, Records Officers tab, and bringing up a name as usual:



APPX - itac002sp.dts.utah.gov:8060:28783

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

### Mailing List

## Brian Jones

Key	Prefix	Last Name	First Name	Middle Name	Familiar Name	Suffix
21485		Jones	Brian		Brian	

Title:

**Address Auto Correct**  
**Address Reformat**

**Physical Address**

Bldg/Ofc/Dept:

Street:

City:    -

**Mailing Address**

☒ Same as Physical Address

Street/PO Box:

City:    -

**Contact Information**

Phone:   -  Ext:  Fax:   -

Email:  **Send Email**

Notification Method:  **Receives Notifications:** ☒

Building Mail: ☐ **Agency to Appear on Label if Building Mail is Used:**

**Comments:**

**Role Description:**  **Edit**

**Certification**

Original:

Last:

Expires:

**Box Inventory ID:**  If non-blank, box inventory system will use address info from APPX

**UMD ID:**

**Training Classes (1)** **Entity Relationships (1)** **OK** **Cancel**

APX ARC BIB UT Chg

To navigate to the next record, click on the Next Rec button on the toolbar. To view the roles and entity relationships this person has, click Entity Relationships:

APPX - itac001sp.dts.utah.gov:8060:17455

File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Chg Attr Menu 1st Rec Prev Pg Up 1 Rec Dn 1 Rec Page Dn Last Page Next Rec Rescroll Redisplay New Sess End Sess

**Link Addressee to Contact Type**

Contact: James Perkins Jr.

Code	Description	from	to	GRAMA Default:
CAO	Chief Administrative Officer	08/17/2015	MM/DD/CCYY	?

Agency: 3184 Garfield Co. Sheriff Changed: 07/06/2017 MK Status: Active  
Reviewed: MM/DD/CCYY

First Name Suffix  
Jr.

Address Auto Correct  
Address Reformat

Physical Address  
0 -

Certification  
Original: MM/DD/CCYY  
Last: MM/DD/CCYY  
Expires: MM/DD/CCYY

< Exit OK Cancel

Role Description:  
Edit

Box Inventory ID: If non-blank, box inventory system will use address info from APPX  
UMD ID:

Send CAO Link Training Classes Entity Relationships (1) OK Cancel

APX ARC BIB UT Inq

Provide the 3-letter code representing the role of the person, such as:

- ARO
- CAD
- CAO
- CEO
- DST
- ERO
- FRO
- ROT

Or click the Scan option (red magnifying glass) to lookup available values:

APPX - itac001sp.dts.utah.gov:8060:17455

File Options Help

Enter End Cancel Back Go To Chg Key Chg Attr Menu 1st Rec Prev Pg Up 1 Rec Dn 1 Rec Page Dn Last Page Next Rec Rescroll Redisplay New Sess End Sess

### Link Addressee to Contact Type

Scan (Mail Type)

CAO Mail Type Code

Mail Code	Description
ARO	Records Officer
CAD	Chief Admin Officer Designee GRAMA
CAO	Chief Administrative Officer
CEO	Chief Executive Officer
DST	Destruction Letter Approver
ERO	Exempt Records Officer
FRO	Former Records Officer or CAO
ROT	Records Officer Training

Select File Goto... OK  
Select Path Cancel

7/2015 to MM/DD/CCYY GRAMA Default: ?  
Changed: 07/06/2017 MK Status: Active

Cancel

If non-blank, box inventory system will use address info from APPX

First Name Suffix  
Jr.

Address Auto Correct  
Address Reformat

Physical Address

Certification  
Original: MM/DD/CCYY  
Last: MM/DD/CCYY  
Expires: MM/DD/CCYY

Send CAO Link Training Classes Entity Relationships (1) OK Cancel

APX ARC BIB UT Inq

Click OK to bring back a value. If you are adding a new role, the start date will be filled in automatically. The GRAMA Default field is used to identify if the person has a primary responsibility of answering public records requests, in which case they will automatically receive messages from the Open Records Portal when new requests are submitted. The Agency field is for identifying the entity number, which is also a lookup value. The Status field impacts certain website functions, and should be set to Active if the person is still acting in that role. The Reviewed date identifies the last time the CAO reviewed his/her agencies for accuracy in setting records officer assignments. It is only set if the person is a CAO and that CAO submitted the CAO Review web form.

Click Cancel to return to the previous screen. Click Training Classes:

APPX - itac002sp.dts.utah.gov:8060:28783

File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Chg Attr Menu 1st Rec Prev Pg Up 1 Rec Dn 1 Rec Page Dn Last Page Next Rec Rescroll Redisplay New Sess End Sess

**Mailing List** ? ✓ ✕

**Brian Jones**

**Training Class Sessions** ? ✓ ✕

Contact: 21485 Brian Jones

Session Date	Class No	Training Class Title	Date Registered
02/14/2018 09	17	Records Management 101	2018-06-07 02:57

Box Inventory ID: UMD ID: If non-blank, box inventory system will use address info from APPX

Training Classes (1) Entity Relationships (1)

OK Cancel

APX ARC BIB UT Inq

If this individual has registered for training classes, they will be listed here. Click Cancel to return to the previous screen.

To email a records officer, click on the Send Email button.

APPX - itac001sp.dts.utah.gov:8060:17455

File 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

### Send Email to Records Officer

**Sending Email Account:**

**Subject:**

Separate multiple recipients with a comma

**To:**

**cc:**

**bcc:**

**Message:**

**Role Description:**  Records Analyst

**Box Inventory ID:**  If non-blank, box inventory system will use address info from APPX

**UMD ID:** 101004295

APX ARC BIB UT Chg

**First Name**

**Suffix**

**Local Address**

-

**Executive Test Agency**

**Certification**

**Original:** 03/12/2014

**Last:** 02/28/2017

**Expires:** 02/28/2018

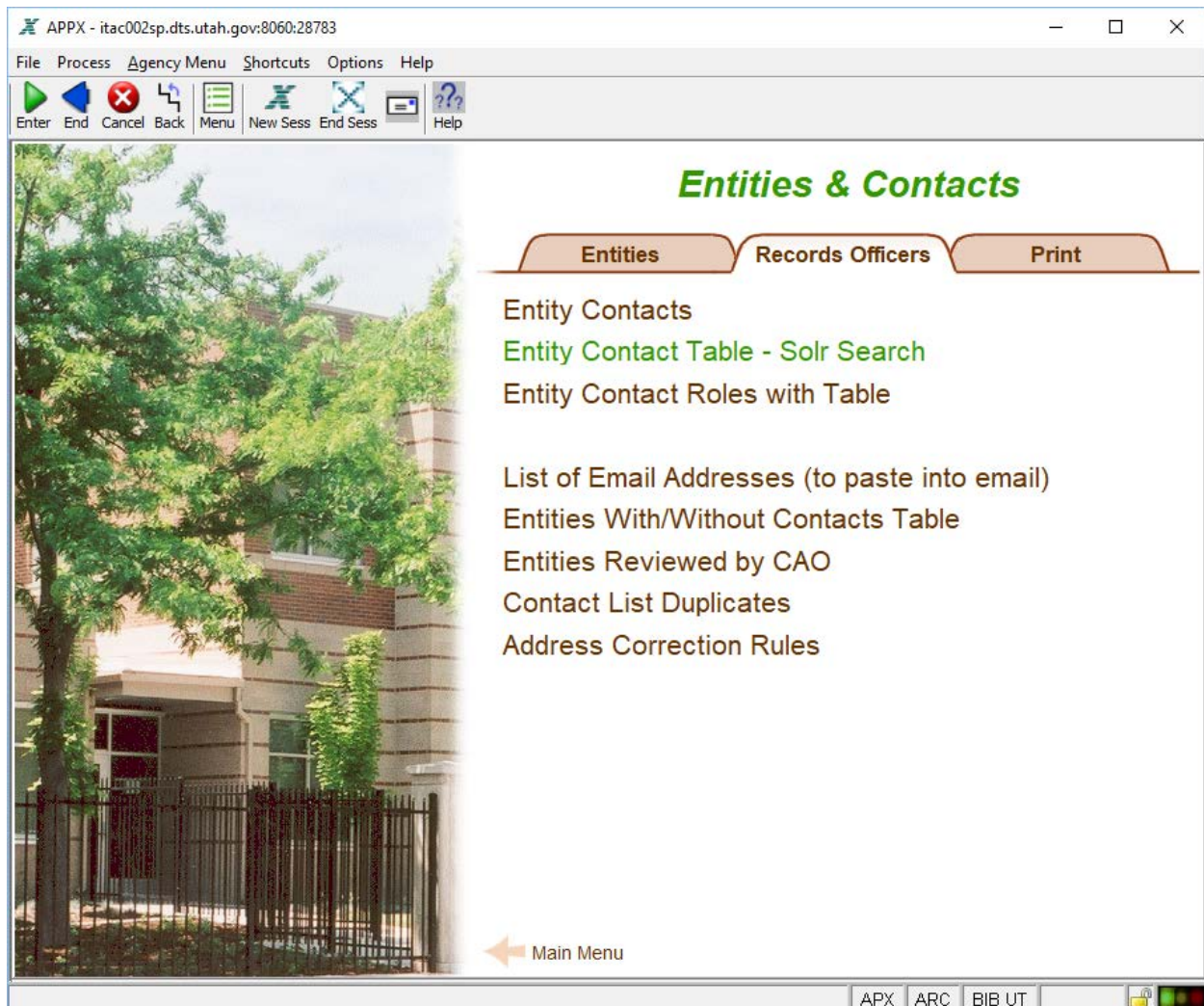
Choose from the list of sending email accounts that have been set up to work with the Gmail API.

Compose your message and click OK to send.

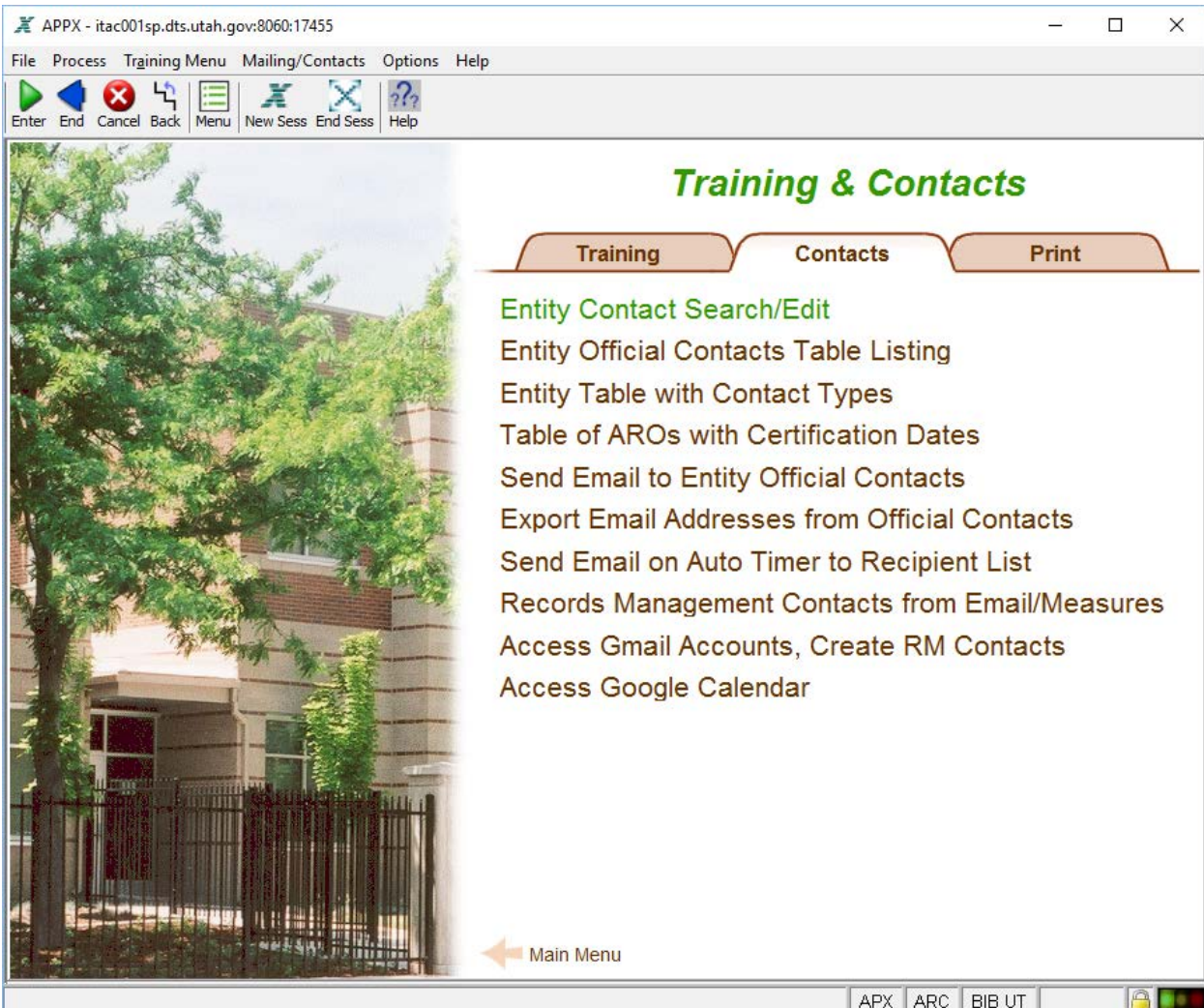
Click Cancel to return to the menu.

Click on the Entity Contact Table – Solr Search option on the menu:





Note that this same option is called Entity Contact Search/Edit on the Training Menu, Contacts tab:





APPX - itac001sp.dts.utah.gov:8060:17455

File Process Contacts 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 Print

### Contacts List

Quick Search Options

Keyword Search:  Search

Sort By:

Max # of Records to Display: 1000

# of Records found: 3830

Mail Key	First Name	Last Name	Phone Number	Email	Certif Exp	Agenc
8	Cee Cee	Niederhauser	801-538-3261	cniederhauser@utah.gov	04/13/2018	Depar
16	Dorothy	Phillips	435-678-1462	dphillip@utah.gov		Board
21	Shauna	DeWolf	801-530-6618	sdewolf@utah.gov	10/07/2017	Depar
24	Teresa	Swanson	801-530-6153	tswanson@utah.gov	12/20/2017	Depar
28	Dennis	Miller	801-530-6657	dennismiller@utah.gov	10/19/2016	Depar
30	Mark	Fagergren	801-530-7967	markf@utah.gov		Depar
32	Michele	Black	801-530-6158	mblack@utah.gov	03/24/2018	Depar
34	Chip	Lyons	801-530-6940	clyons@utah.gov	03/28/2018	Depar
36	Marjorie	Moore	801-245-7202	marjoriemoore@utah.gov	07/22/2017	Depar
38	Claudia	Nakano	801-245-7211	cnakano@utah.gov		Depar
43	Laurie	Leib	801-536-4440	lleib@utah.gov	02/17/2018	Depar
45	Kate	Johnson	801-536-4206	katej@utah.gov	01/27/2016	Depar
49	Arlene	Lovato	801-536-0202	alovato@utah.gov	03/20/2018	Depar
51	Kathryn	Dozier	801-536-0252	kdozier@utah.gov	03/11/2017	Depar
56	Wendy	Peterson	801-538-3075	wendypeterson@utah.gov	09/23/2017	Depar
60	Larene	Wyss	801-538-3361	lwyss@utah.gov	06/23/2018	Depar
65	Bryan	Embley	801-965-4744	bembley@utah.gov	03/20/2018	Depar
74	Alan	Owens	801-545-5703	alanowens@utah.gov	12/09/2017	Depar
79	Monica	Jimenez	801-965-4744	mjimenez@utah.gov	08/23/2017	Depar
85	Jay	Jensen	801-538-4231	jayjensen@utah.gov	09/30/2017	Depar
88	Joseph	Gonzalez	801-538-8270	jgonzalez@utah.gov		Depar
92	Sara	Danielson	801-530-6953	sdanielson@utah.gov	10/13/2017	Labor
102	Dianne	Davis	801-537-3305	diannedavis@utah.gov	05/07/2014	Depar
104	Tammy	Wright	801-538-7359	tammywright@utah.gov	11/02/2017	Depar
106	Rusty	Andersen	801-538-7321	rustyandersen@utah.gov	06/24/2016	Depar
110	Lauralee	Blue	801-281-5094	lblue@utah.gov	05/19/2018	Depar

Edit Filter Apply Filter New Clone Delete OK Cancel

APX ARC BIB UT Chg

There are several important things to note about this screen. The first one is the “Max # of Records to Display” field at the top, where it limits the search results to a certain number of hits. You may edit the filter to change this setting. In the screen above, it is set to 1,000, which is fewer than the number of names in the database, so if you start sorting the table by columns, realize that you don’t have the whole set of names in front of you.

You may do a simple keyword search at the top. Add a search term and click Search.

APPX - itac001sp.dts.utah.gov:8060:17455

File Process Contacts 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 Print

### Contacts List

Quick Search Options

Keyword Search:

Sort By:

Max # of Records to Display:

# of Records found: 3830

Mail Key	First Name	Last Name	Phone Number	Email	Certif Exp	Agency L
4125	Elizabeth	Hart		elizabethh@vineyardtown.com		
4202	Elizabeth	Perkes	801-531-3852	eperkes@utah.gov		
20253	Elizabeth	Sollis	801-538-3991	liz@utah.gov		
20882	Elizabeth	Christensen	801-225-6692 EXT 4	elizabeth@umma.org		Risk Man
1519	Elizabeth	Hone	435-623-1959	ehone.levantown@gmail.com	11/14/2017	Levan (U
21339	Elizabeth	VanDerwerken	801-852-6120	evanderwerken@provo.org		Storm W
21255	Elizabeth	Nance	435-259-7161	moabmad@frontiernet.net	01/18/2018	Moab Mo
826	Elizabeth	Holt	435-888-6613	liz@eastcarboncity.org	01/11/2018	East Car
3357	Anne	Hatch	801-785-3442	aehatch@orem.org	05/04/2017	North Uta
2655	Jennie	Carbine	801-784-5211	jcarbine@syracuseartsacademy.org	06/12/2015	Syracuse
2536	Amanda	Parker	435-723-1094	apeters@utah.gov	07/28/2016	Departm

APX ARC BIB UT Chg

Double-click a row, or single-click and then click OK to view the record:

APPX - itac002sp.dts.utah.gov:8060:28783

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

### Mailing List

## Elizabeth Christensen

Key	Prefix	Last Name	First Name	Middle Name	Familiar Name	Suffix
20882		Christensen	Elizabeth		Elizabeth	

Title:  Address Auto Correct

Address Reformat

Physical Address:

Bldg/Ofc/Dept:

Street:

City:    -

Mailing Address:

☒ Same as Physical Address

Street/PO Box:

City:    -

Contact Information:

Phone:   -  Ext:  Fax:   -

Email:  Send Email

Notification Method:  Receives Notifications: ☒

Building Mail: ☐ Agency to Appear on Label if Building Mail is Used:   ?

Comments:

Role Description:  Edit

Box Inventory ID:  If non-blank, box inventory system will use address info from APPX

UMD ID:

Training Classes (3) Entity Relationships (1) OK Cancel

APX ARC BIB UT Chg

Click Cancel to go back to the previous screen.

Click Edit Filter.

APPX - itac001sp.dts.utah.gov:8060:17455

File Process Options Help

Save Cancel New Edit View Delete Ack Del Menu New Sess End Sess

### Contacts List

**Contact Filter Options**

Key

First Name

Last Name

Phonetic Name

City

County

Email

Phone Num  Ext.

Fax Num

Certified? ☐

Certificate Expiration  MM/DD/CCYY to  MM/DD/CCYY

Keyword search

**Contact Role**

Status  Active

Contact Type(s)

And/Or

And/Or

Contact Type to Exclude

GRAMA Responder? ☐

\*Exclusion happens regardless of Entity or Status

**Related Entity**

Entity

Entity Hierarchy

Entity Name

Entity Type

Check Lower Levels ☐

Check Prev Struct ☐

**Filter Parameters**

Sort By:

Max # of Records to Display:

Remember Options ☒

Front end search ☐

Reset Definitions Filter Cancel

Edit Filter Apply Filter New Clone Delete OK Cancel

APX ARC BIB UT Chg

This screen allows you to do advanced searching, including some level of phonetic searching (not perfect, but better than nothing). You may filter by any combination of values and set it to remember those options. If you always want the filter screen to display instead of the simple search/table after clicking on the menu item, check the Front End Search checkbox. Click Reset to undo your filter choices back to the default, or click Filter to save them. If you set the max number of records to display to a smaller number, the table view will display faster when accessing it from the menu. The Definitions button offers a reminder of what the logical operators mean:

Click New to add a new record.

APPX - itac001sp.dts.utah.gov:8060:17455

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

### Mailing List

Key	Prefix	Last Name	First Name	Middle Name	Familiar Name	Suffix
21380						

Title:

**Physical Address**

Bldg/Ofc/Dept:

Street:

City:  -

**Mailing Address**

☒ Same as Physical Address

Street/PO Box:

City:  -

**Contact Information**

Phone:  -  Ext:  Fax:  -

Email:

Notification Method:  Receives Notifications: ☒

Building Mail: ☐ Agency to Appear on Label if Building Mail is Used:

**Comments:**

**Role Description:**

**Box Inventory ID:**  If non-blank, box inventory system will use address info from APPX

**UMD ID:**

**Certification**

Original:

Last:

Expires:

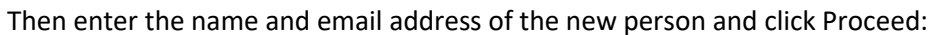
**Buttons:** Training Classes Entity Relationships OK Cancel

APX ARC BIB UT Add

Edit as needed. Click OK to save your changes or Cancel to return to the previous screen.

If you want an existing record to serve as a model for a new mailing list record (such as a new records officer replacing an old one, tied to the same agencies), do not just type over the original person's name. Instead, select a record from the table and click Clone:





Then enter the name and email address of the new person and click Proceed:

APPX - itac001sp.dts.utah.gov:8060:17455

File 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

Contacts List

Quick Search Options

Keyword Search:  Search

Sort: Clone Mailing List Record

This process will create a new mailing list record based on the current one. Corresponding Entity Relationships will also be created.

New Mailing List entry will be based on the data for:  
**Elizabeth Perkes**

Please enter the name and e-mail address of the new individual:

Last Name\*:

First Name\*:

Middle Name:

E-mail Address:

Cancel Proceed

# of R	M				Email	Certif Exp	Agenc
		1415	Scott	Jones	801-676-1018		
		1417	Mallory	Woodbury	801-676-1018		
		1423	Angelee	Spader	801-731-9859		
		1425	Brian	Myrup	801-489-7828		
		1429	Candice	Spivey	801-789-7625		
		1432	Larry	Madden	801-578-8226		
		1436	Lorraine	Brighton-Smith	801-936-0318 EXT 2		
		1440	Scott	Jackson	435-787-2820		
		1448	Mark	Child	801-393-3900		
		1450	Sam	Gibbs	435-673-4110		
		1410	Russell	Schellhous	801-492-8105		
		4202	Elizabeth	Perkes	801-531-3852		

Edit Filter Apply Filter

New Clone Delete

OK Cancel

APX ARC BIB UT Add

APPX - itac001sp.dts.utah.gov:8060:17455

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

**Mailing List** ? [X]

## Don Hacks

Key	Prefix	Last Name	First Name	Middle Name	Familiar Name	Suffix
4262		Hacks	Don		Elizabeth	

Title:

Address Auto Correct  
Address Reformat

**Physical Address**

Bldg/Ofc/Dept:

Street:

City:    -

**Mailing Address**

☒ Same as Physical Address

Street/PO Box:

City:    -

**Contact Information**

Phone:   -  Ext:  Fax:   -

Email:

Notification Method:  ☒ Receives Notifications: ☒

Building Mail: ☐ Agency to Appear on Label if Building Mail is Used:

**Comments:**

**Role Description:**

Box Inventory ID:  If non-blank, box inventory system will use address info from APPX

UMD ID:

**Certification**

Original: MM/DD/CCYY

Last: MM/DD/CCYY

Expires: MM/DD/CCYY

APX ARC BIB UT Inq

Edit this entry as needed. If the name being cloned has entity relationships, they will be the same in the new record.

To delete this entry, search for the name from the table list and click Delete:

APPX - itac001sp.dts.utah.gov:8060:17455

File Process Contacts 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 Print

### Contacts List

Quick Search Options

Keyword Search:  Search

Sort By:

Max # of Records to Display:

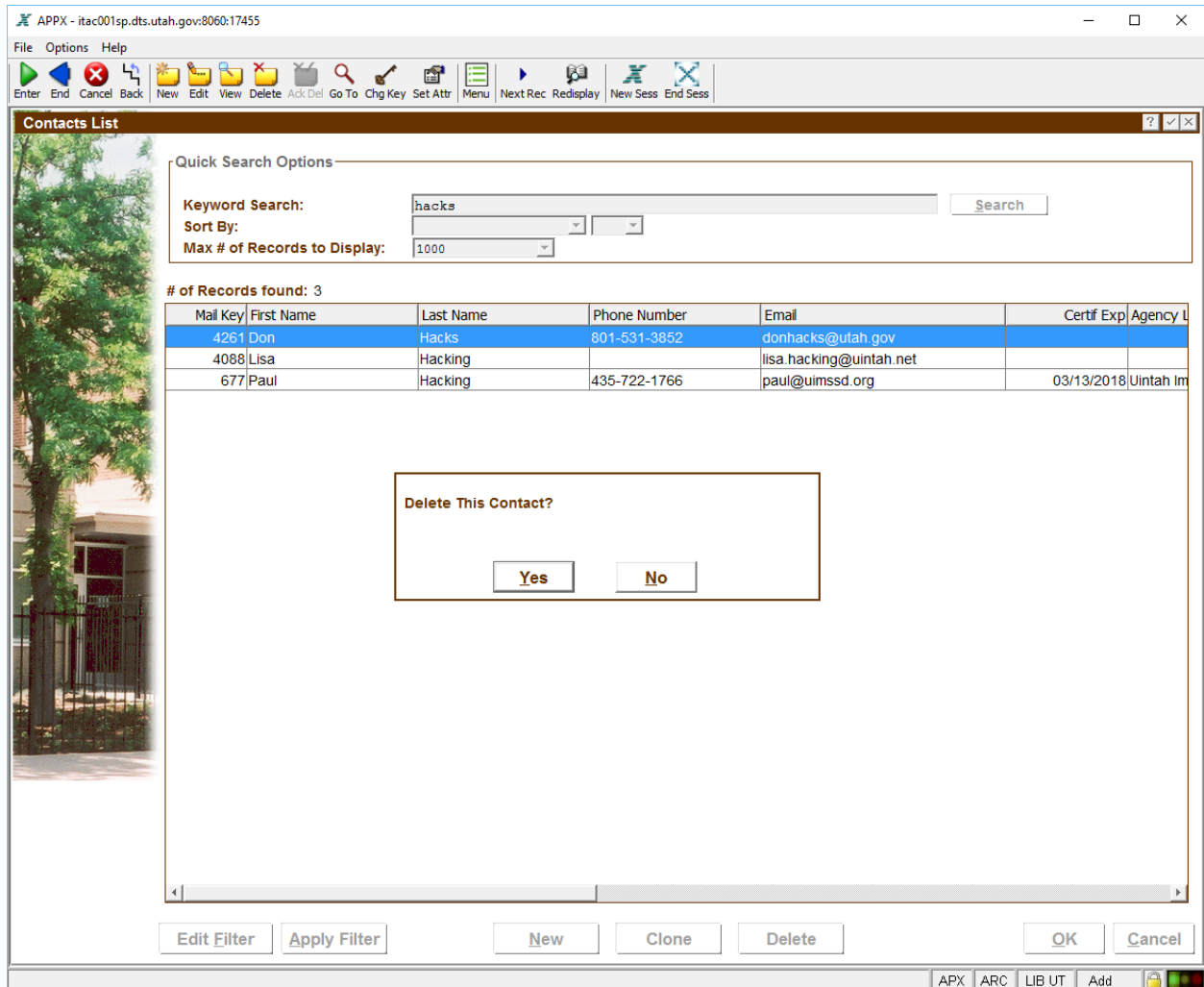
# of Records found: 3

Mail Key	First Name	Last Name	Phone Number	Email	Certif Exp	Agency L
4261	Don	Hacks	801-531-3852	donhacks@utah.gov		
4088	Lisa	Hacking		lisa.hacking@uintah.net		
677	Paul	Hacking	435-722-1766	paul@uimssd.org	03/13/2018	Uintah Im

Edit Filter Apply Filter New Clone Delete OK Cancel

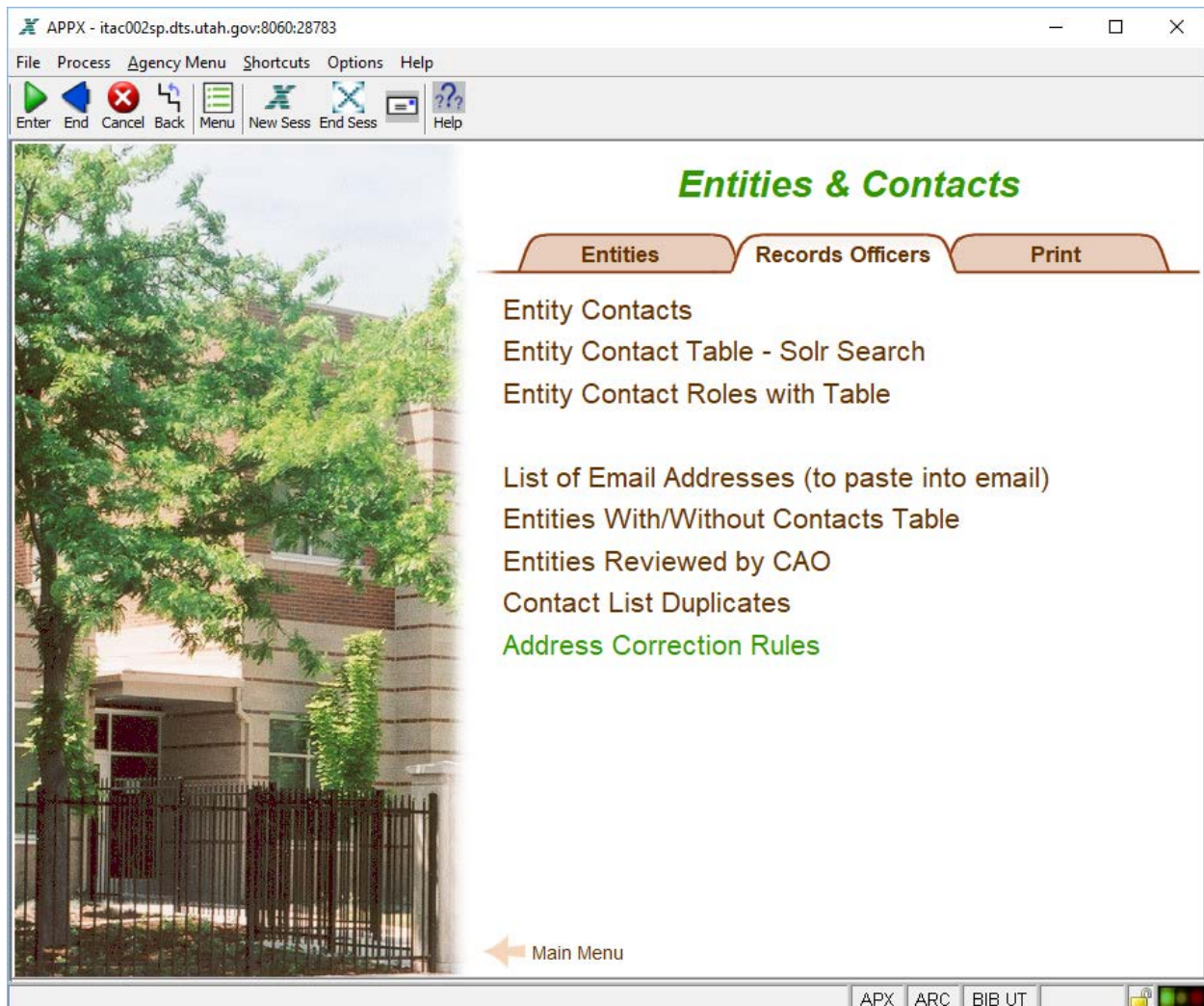
APX ARC BIB UT Chg

Indicate that the deletion is intended:



Click Yes and the name will be gone. Click Cancel to go back to the previous screen and Cancel again to go back to the menu.

Click Address Correction Rules:



For any address element, the system will look for patterns as expressed here and replace them with the preferred term as names are added to the mailing list (whether through the client or the website), meaning ADD MODE ONLY. It will not auto-correct existing records (CHANGE MODE) without user action:



APPX - itac001sp.dts.utah.gov:8060:17455

File Options Help

Enter End Cancel Back New Edit View Delete Ack Del Go To Chg Key Chg Attr Menu 1st Rec Prev Pg Up 1 Rec Dn 1 Rec Page Dn Last Page Next Rec Rescroll Redisplay New Sess End Sess

### Address Correction Rules

Original	Replace With
E	East
N	North
S	South
SLC	Salt Lake City
W	West

< Exit OK Cancel

APX ARC BIB UT Chg

Add any useful terms needed. Note that address elements will automatically be changed to Title Case even if someone adds them all lower case or all caps. Click Cancel and return to Entity Contacts:

APPX - itac001sp.dts.utah.gov:8060:17455

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

### Mailing List

## Pam Perri

Key	Prefix	Last Name	First Name	Middle Name	Familiar Name	Suffix
21182		Perri	Pam		Pam	

Title:

**Address Auto Correct**  
**Address Reformat**

**Physical Address**

Bldg/Ofc/Dept:

Street:

1594 West North Temple

City: Salt Lake City UT 84116 -

**Mailing Address**

☒ Same as Physical Address

Street/PO Box:

City:   0 -

**Contact Information**

Phone: 801 - 537 - 3305 Ext:  Fax:  -

Email: pamperry@utah.gov **Send Email**

Notification Method: E-mail ☒ **Receives Notifications:** ☒

Building Mail: ☐ Agency to Appear on Label if Building Mail is Used: 426 Geological Survey

**Comments:**

**Role Description:**

**Edit**

**Certification**

Original: MM/DD/CCYY

Last: MM/DD/CCYY

Expires: MM/DD/CCYY

Box Inventory ID:  If non-blank, box inventory system will use address info from APPX

UMD ID:

**Training Classes** **Entity Relationships (2)** **OK** **Cancel**

APX ARC BIB UT Inq

The Address Auto Correct button will apply the auto-correct rules to this existing record. The Address Reformat option will move address elements perceived to being a mailing address rather than a physical address to the Mailing Address set of fields, and place the physical address elements in their preferred spot:

APPX - itac001sp.dts.utah.gov:8060:17455

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

### Mailing List

## Pam Perri

Key	Prefix	Last Name	First Name	Middle Name	Familiar Name	Suffix
21182		Perri	Pam		Pam	

Title:

Physical Address

Bldg/Ofc/Dept:

Street:

City:    -

Mailing Address

☒ Same as Physical Address

Street/PO Box:

City:    -

Contact Information

Phone:   -  Ext:  Fax:   -

Email:

Notification Method:  Receives Notifications: ☒

Building Mail: ☐ Agency to Appear on Label if Building Mail is Used:  Geological Survey

Comments:

Role Description:

Box Inventory ID:  If non-blank, box inventory system will use address info from APPX

UMD ID:

APX ARC BIB UT Inq