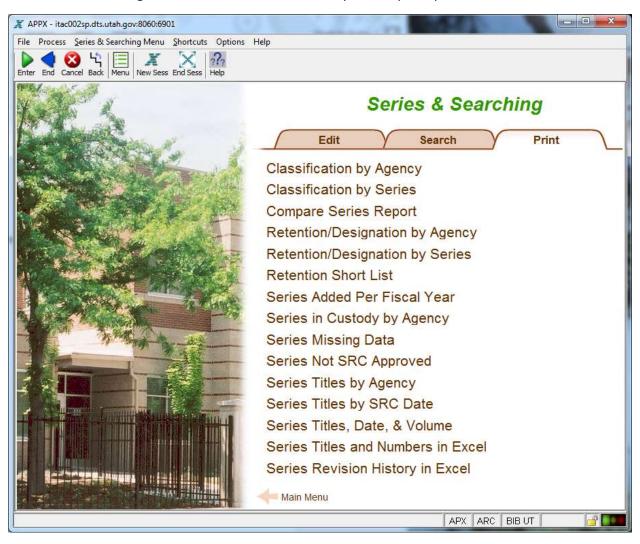
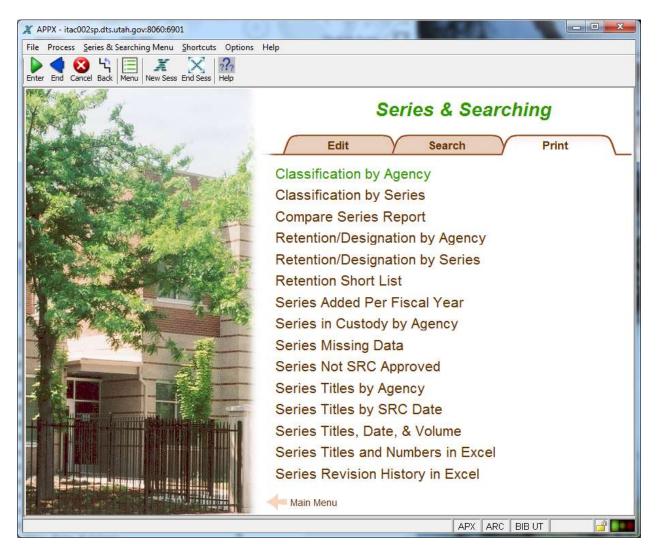
Series & Searching Print Menu

August 10, 2016

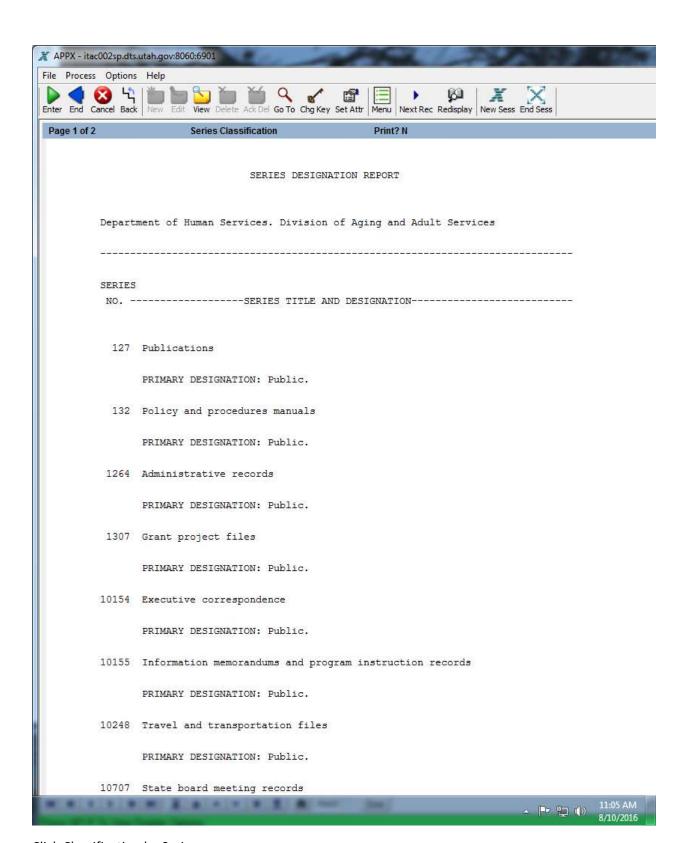
The Series & Searching Menu, Print tab, offers commonly-used report options related to record series.

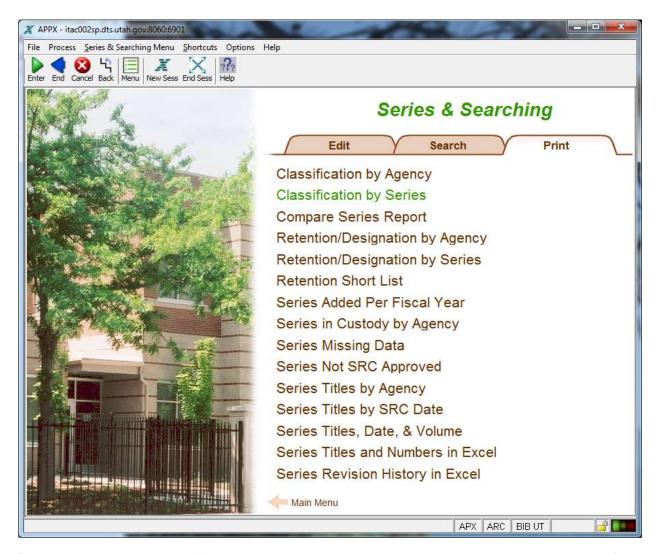


Click Classification by Agency.

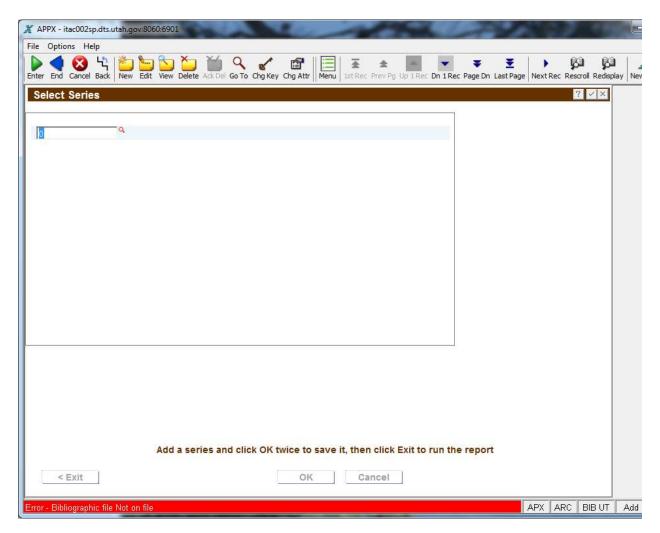


- This is a text report
- Query asks for:
 - Agency number
 - Agency hierarchy levels 1 through 5
- Sort is by:
 - Agency hierarchy levels 1 through 5
 - Agency official name
 - Series number
 - Series short title
- Information includes:
 - Agency long name
 - o Series number
 - o Series title
 - o Primary and secondary designation/classification

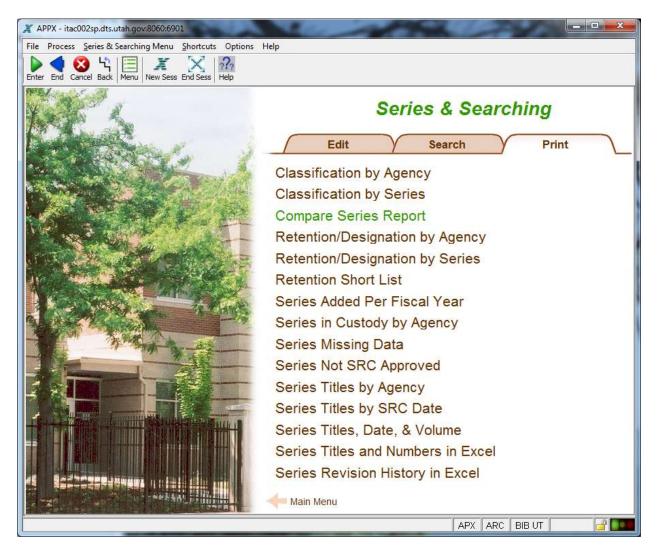




[Bug report: This report doesn't run due to problems with the initial input screen, namely no Blank if Zero of the bibliographic ID, as well as disabled buttons. Entering a series and pressing Enter manually still results in errors. Report results in No Lines Output.]

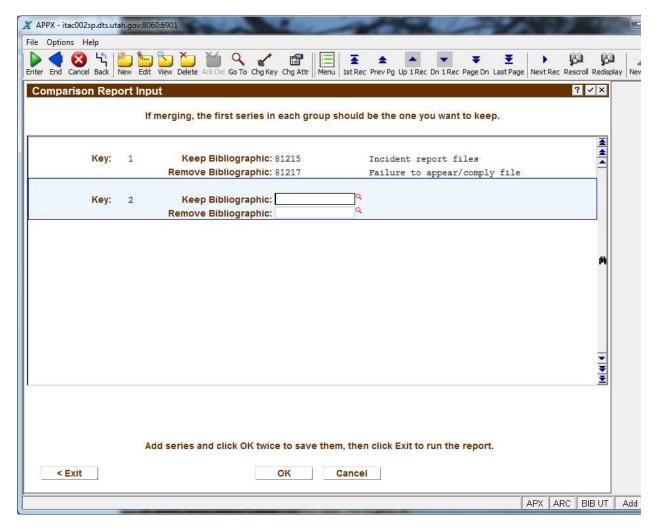


Click Compare Series Report.



This report displays two series side-by-side and is commonly used when preparing to merge one series into the other.

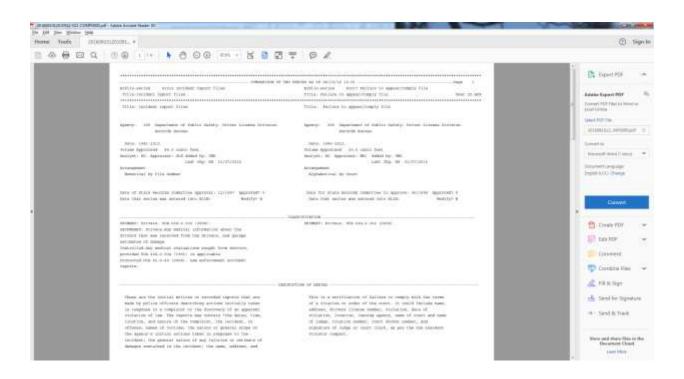
The query is an input screen, asking for the bibliographic id's of each series:



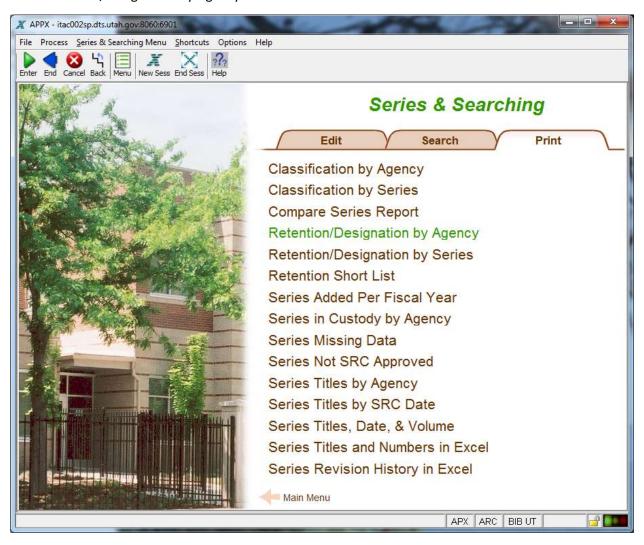
Click Exit or End to continue to the next screen. To cancel the report, click Cancel.

- PDF report
- Query is an input process, asks for series number to keep and series number to merge.
- No sort
- Date includes:
 - o Series number
 - Series title
 - Agency number
 - Agency title
 - Series dates
 - o Volume appraised
 - Analyst assigned to series
 - Who appraised the series
 - Series added by
 - o 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
- o Total microfilm count
- Microfilm accession numbers
- o 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
- o Format management retention statements



Click Retention/Designation by Agency.

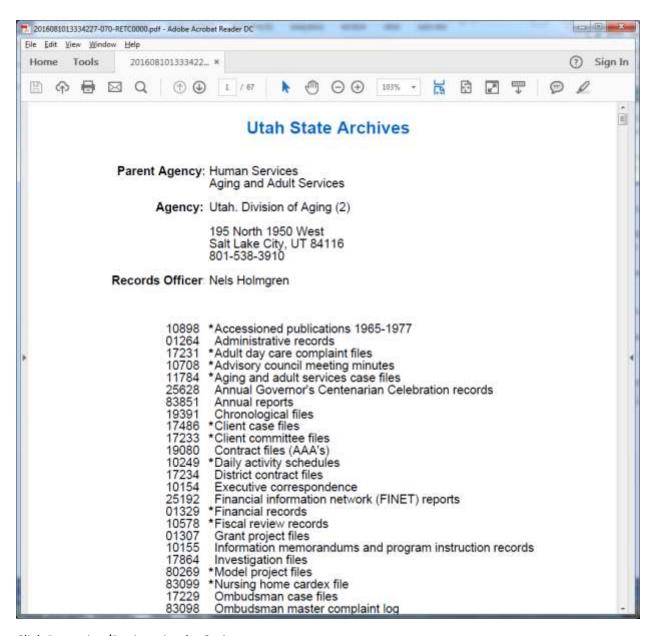


- PDF report
- Parameters controlling display of certain elements are set from an input screen, asking for:
 - Print the superior agency
 - Print the agency approval signature sheet
 - Print the SRC approval signature sheet
 - o Print Personal data elements
 - Print GRAMA data
 - Print Page numbers
 - o 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

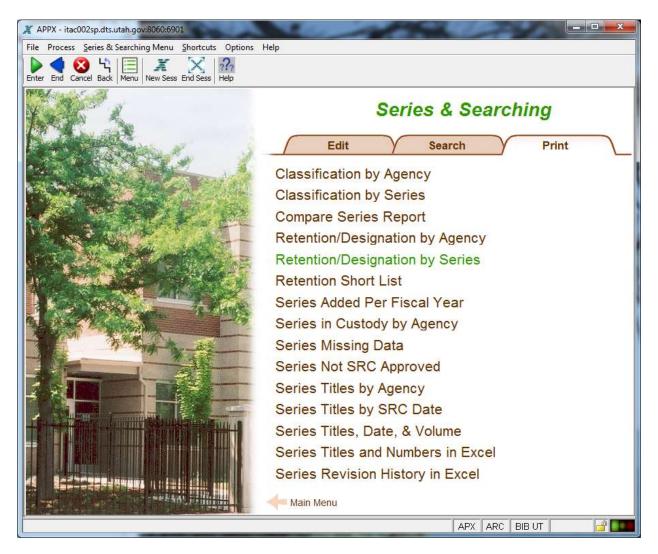
- State Records Committee approved checkbox
- o State Records Committee approved date
- Agency number
- o Series number range
- Series cataloged date range

• Data includes:

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

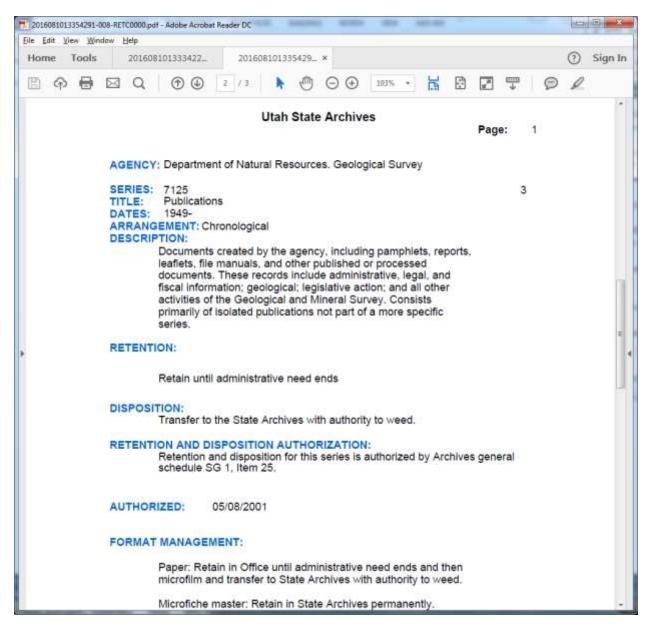


Click Retention/Designation by Series

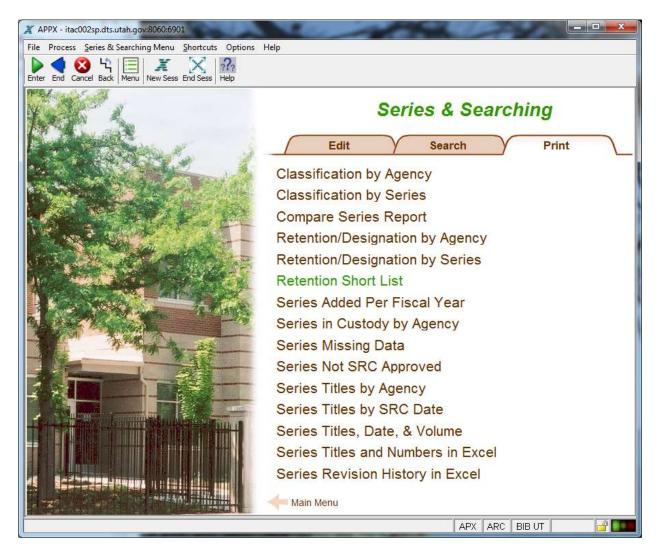


- PDF report
- Query is an input process that asks for one or more series numbers
- Parameters controlling display of certain elements are set from an input screen, asking for:
 - Print the superior agency
 - Print the agency approval signature sheet
 - Print the SRC approval signature sheet
 - Print Personal data elements
 - Print GRAMA data
 - Print Page numbers
 - o Print user, date, time
 - Print SRC approved/not approved
 - Print closed series
 - o Print format management information
 - o Print program name (disabled)
- Data includes:
 - Agency name
 - Agency number

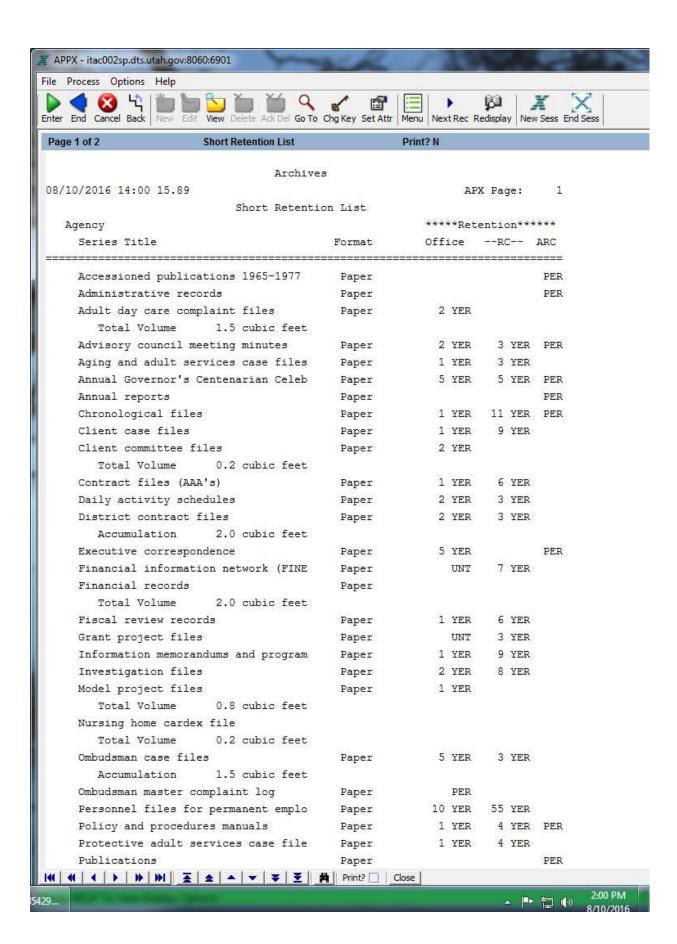
- Agency address
- Agency phone
- o Records officer name
- o Series number
- Series title
- Series title
- Series dates
- o Series arrangement
- o Series schedule description
- Retention
- o Disposition
- o Retention and disposition authorization (e.g. SRC approval, general schedule, etc.)
- Date schedule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



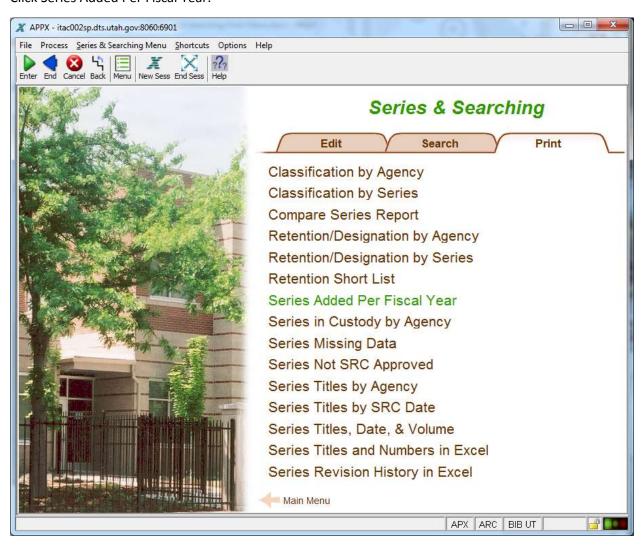
Click Retention Short List.



- Text report
- Query asks for:
 - State Records Committee approval date range
 - Whether approved by the State Records Committee
 - Agency number
- Sort is by:
 - Agency short name
 - Series short title
- Information includes:
 - o Series title
 - Total volume (from accruals in Format Management)
 - o Format
 - o Length of time in office
 - o Length of time in Records Center
 - o Whether permanent in Archives

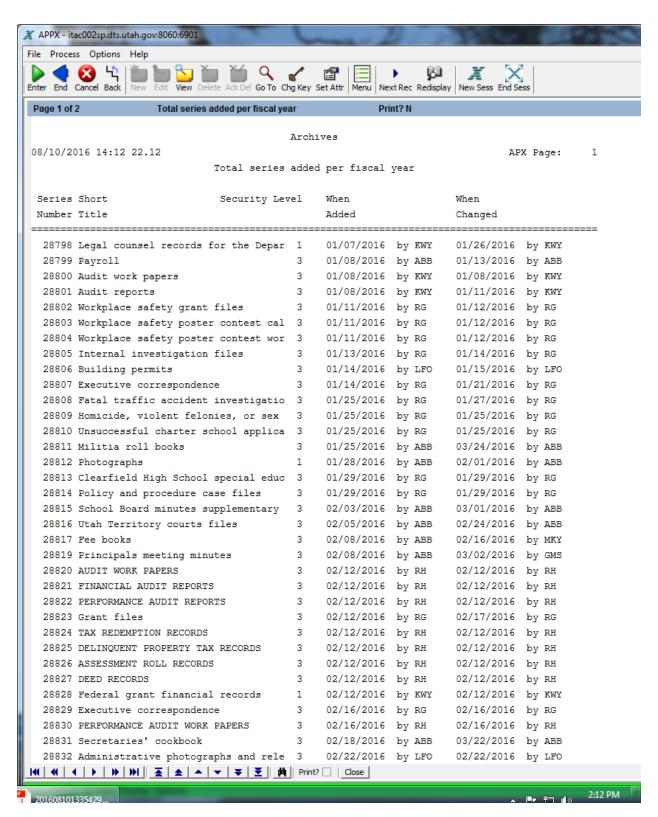


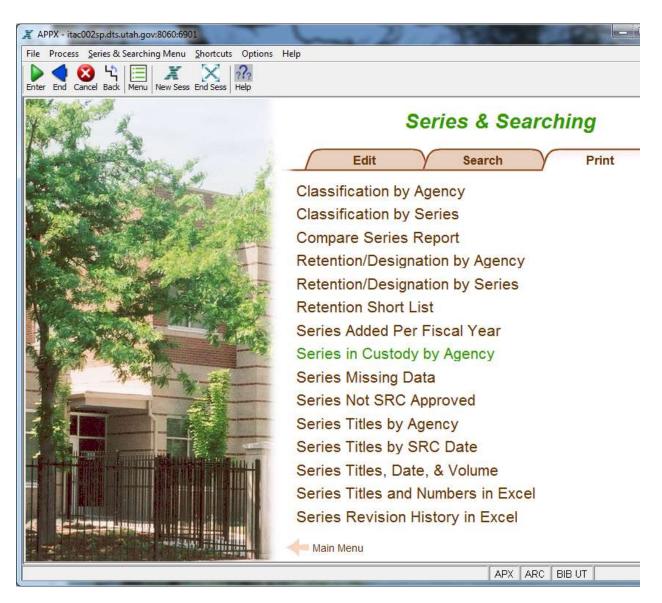
Click Series Added Per Fiscal Year.



- 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

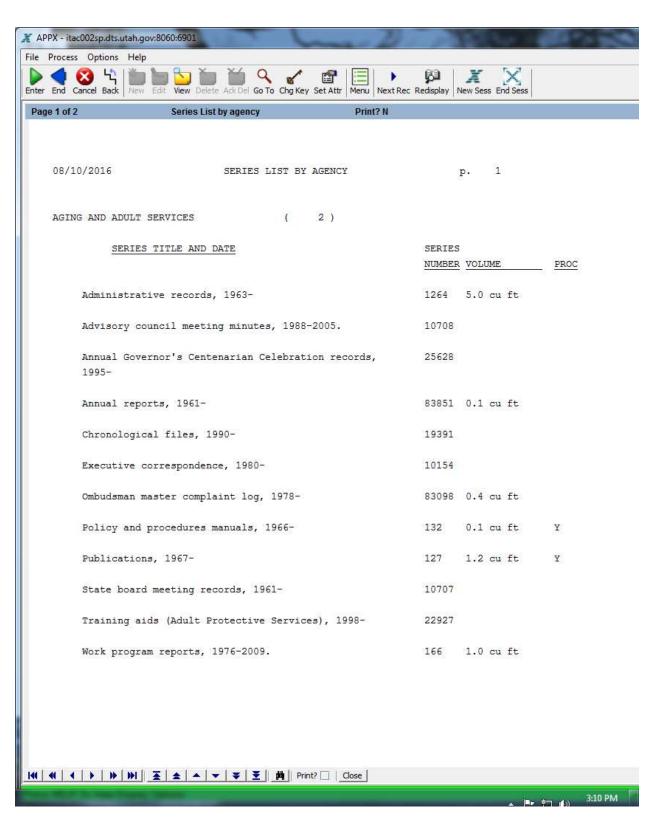
- o Retention status
- Sort by:
 - o Series number
 - o When series was added
- Data includes:
 - o Series number
 - o Series title
 - Security level
 - o When series was added
 - Who added the series
 - When series was last changed
 - o Who changed the series



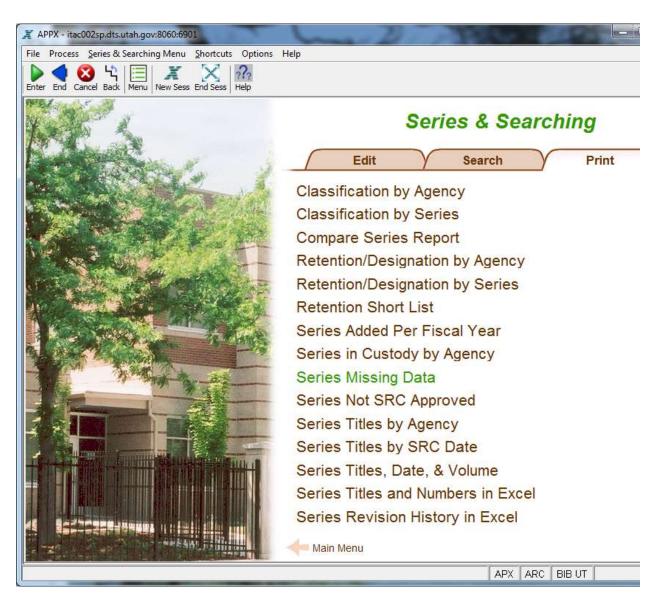


- Text report
- Query asks for:
 - Agency hierarchy levels 1 through 5
 - Primary location of series
 - State Records Committee date
 - Series cataloged date
 - Agency number range
 - Format retention accumulation time
 - Agency type
 - o Is this a general schedule, not a series checkbox
- Sort by:
 - Agency hierarchy levels 1 through 5
 - Agency name
 - Agency number

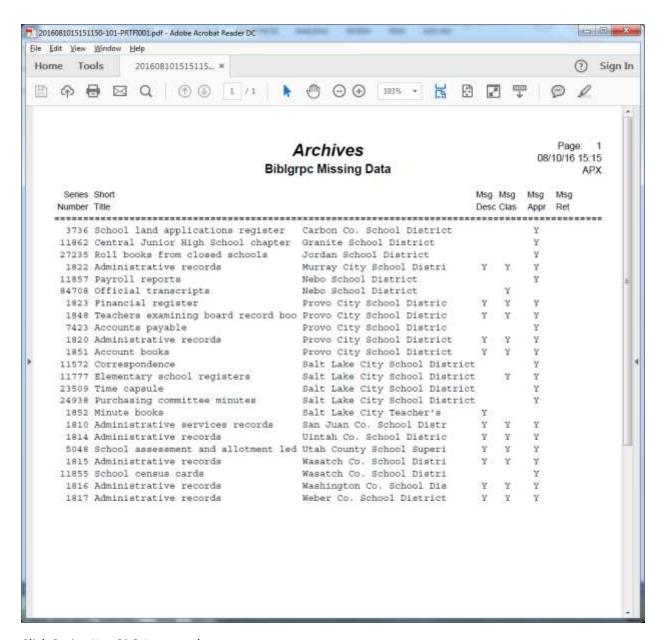
- Series title
- Data includes:
 - o Agency short name
 - o Agency number
 - o Series title with dates
 - o Series number
 - o Volume processed (cubic feet and number of reels)
 - o Whether or not processed



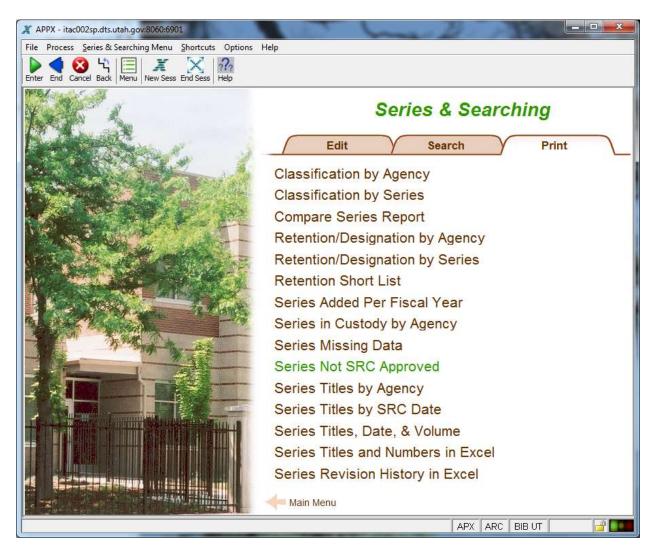
Click Series Missing Data.



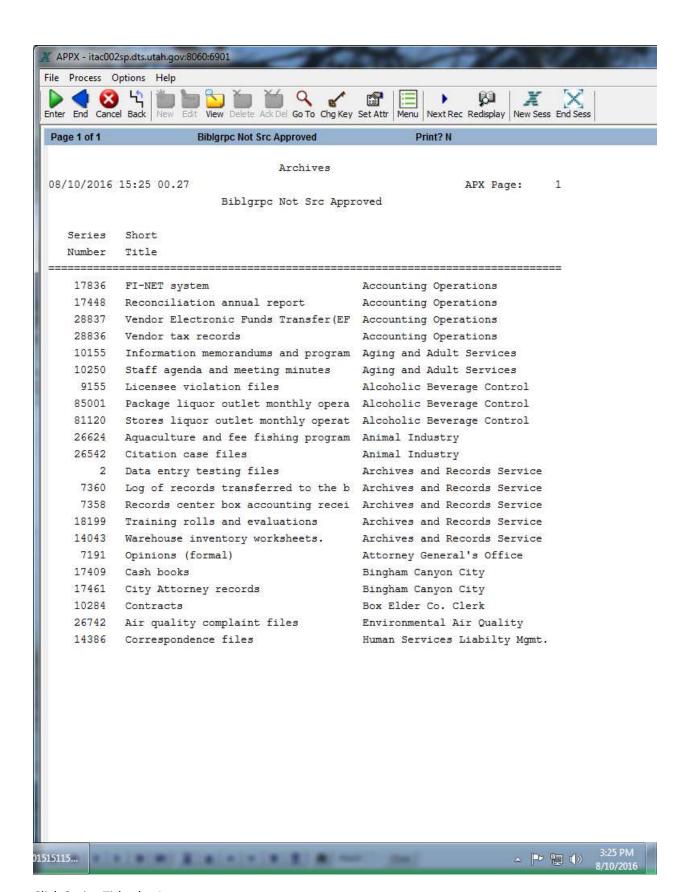
- PDF report
- Query asks for:
 - o Series number range
 - Agency type
- Sort by:
 - Agency name
 - Series number
- Information includes:
 - o Series number
 - Series title
 - Agency name
 - o Whether description, classification, appraisal, or retention is missing

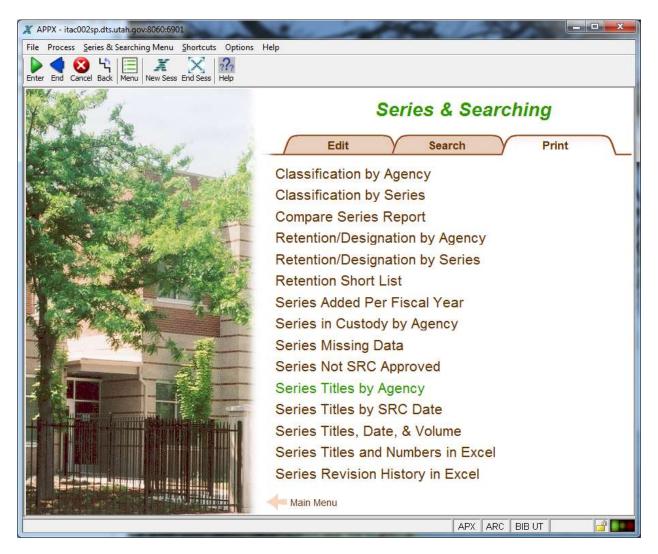


Click Series Not SRC Approved.



- Text report
- Query asks for:
 - Analyst assigned to agency
 - When series was added date range
 - o 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

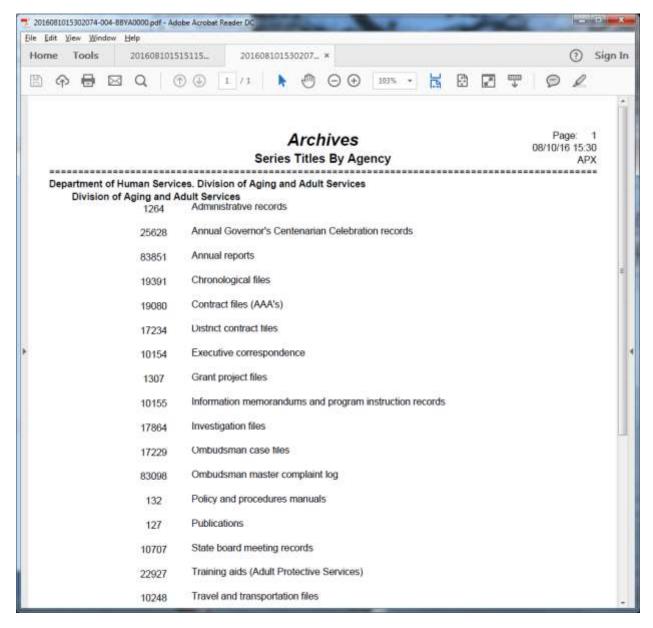




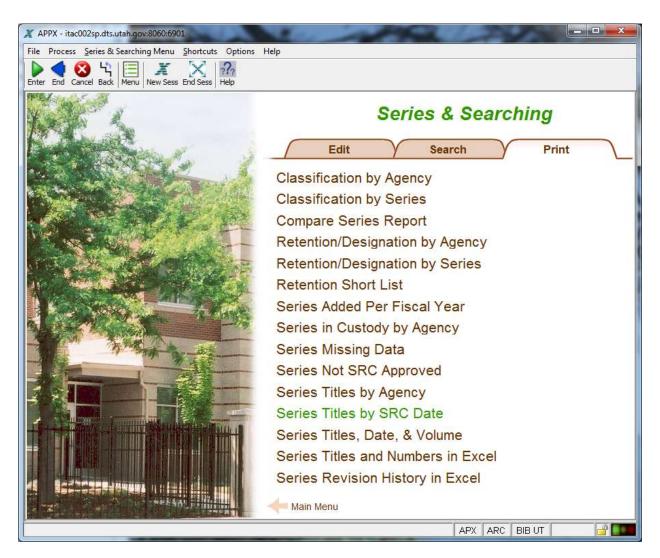
- PDF report
- Query asks for (with a Page Down requirement):
 - Agency hierarchy levels 1 through 5
 - Agency number range
 - State Records Committee approved checkbox
 - Series cataloged date range
 - Series cataloged before checkbox
 - Agency type
 - o Is this a general retention schedule, not a series
 - 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:

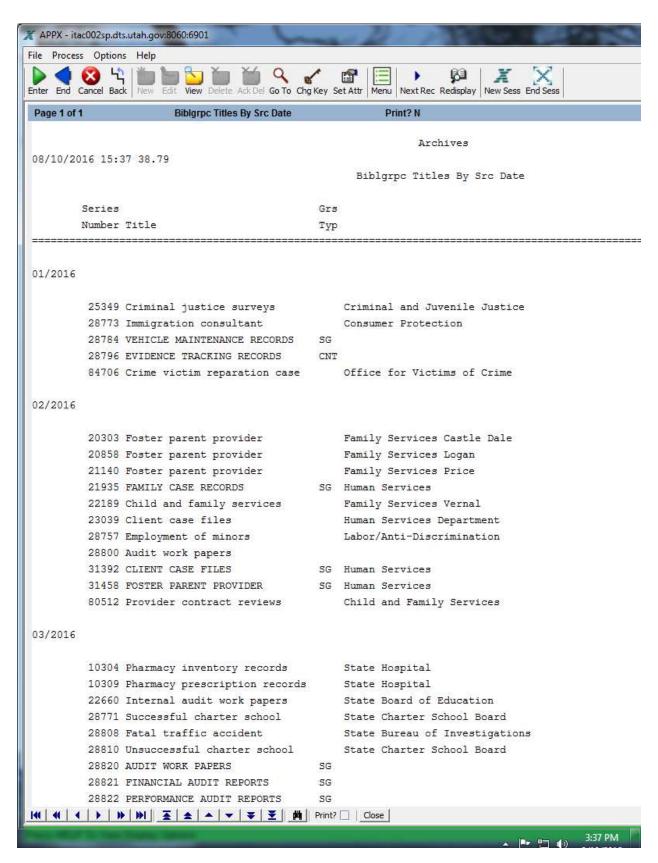
- o Agency long name for each level of the agency hierarchy
- o Series number
- Series title

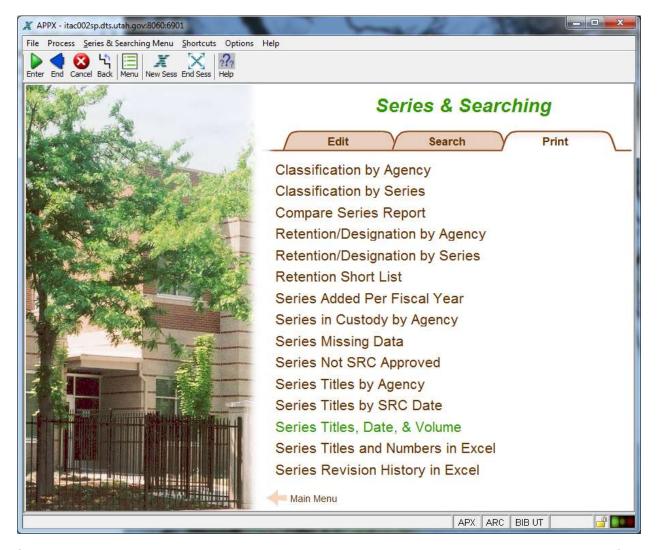


Click Series Titles by SRC Date.



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





[Bug report: This report does not appear on the Reports menu, only on the Series & Searching menu.]

- Text report
- Query asks for:
 - Agency number
 - Agency type
 - Agency hierarchy levels 1 through 3
 - Series number
 - Series short title range
 - Series cataloged date range
 - Whether series was cataloged before
 - Series processed date range
 - Series processed by whom
 - Whether the retention has been approved by the State Records Committee
 - State Records Committee approval date range
 - Whether series is in Archives' custody
 - Whether the bibliographic record is a general schedule, not a series

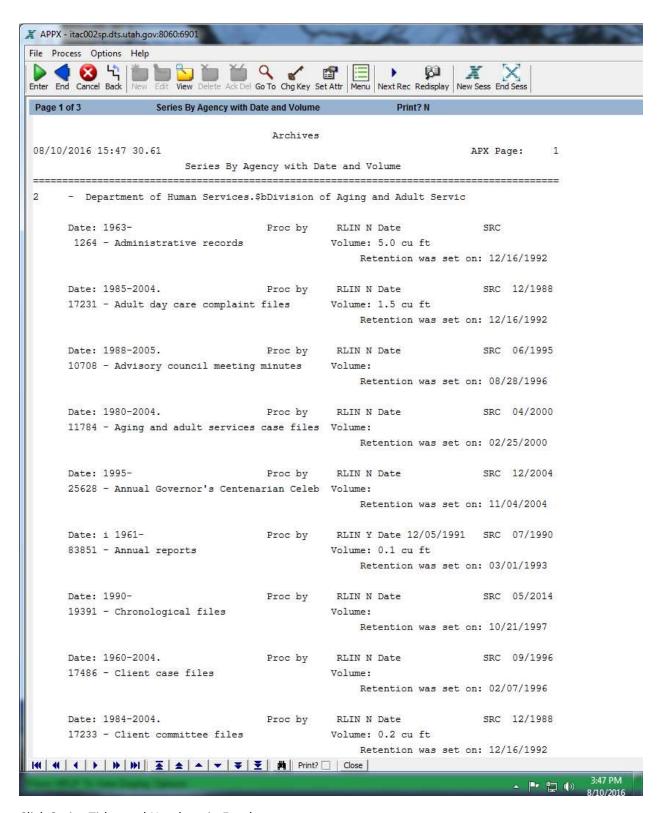
- Whether series is considered scheduled
- o Date format management retention was set

Sort by:

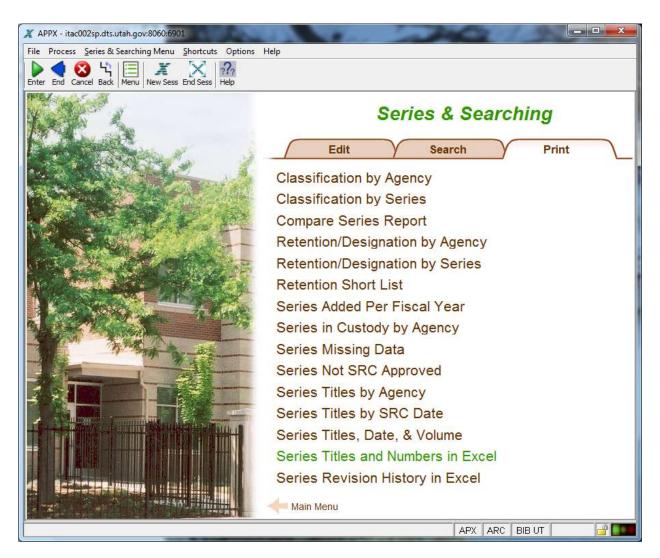
- Agency number
- Agency name
- o A work alpha 35 field representing series short title
- Series number

Data includes:

- Agency key
- o Agency official name
- Series dates
- o Series number
- o Series title (truncated)
- o Series processed by whom
- o Cataloged date
- o State Records Committee approval date
- Volume of series (from accrual estimate within Format Management)
- o Date retention in Format Management was set

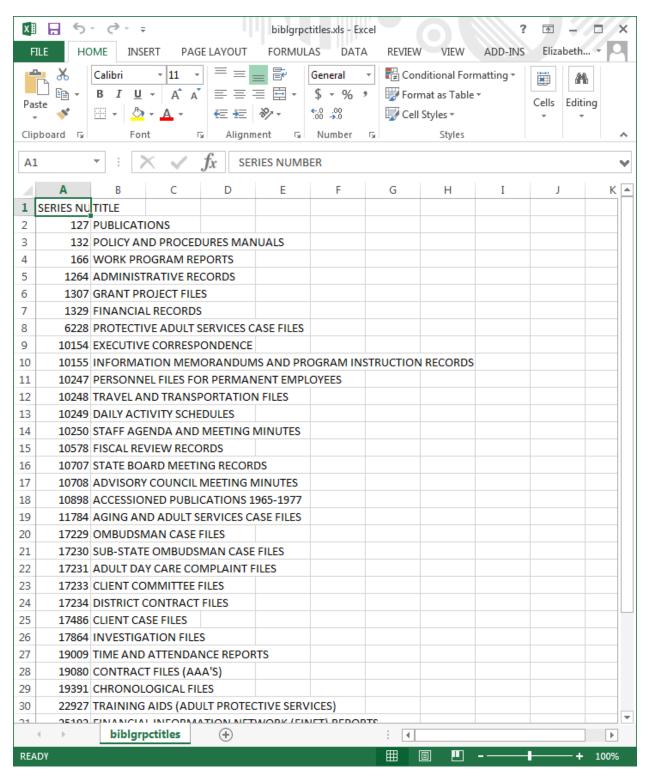


Click Series Titles and Numbers in Excel.



- Spreadsheet report
- Query asks for:
 - Agency key
 - Series number range
- Sort by:
 - Series number
 - Series title
- Data includes:
 - o Series number
 - Series title





Click Series Revision History in Excel.

- Spreadsheet report
- Query asks for:
 - Revision date range

- Series number, aka bibliographic ID
- Sort by:
 - Series number
 - Revision sequence number
 - Revision date
- Data includes:
 - Series number
 - o Revision sequence number
 - Series title
 - Agency name
 - Revision date
 - o Revision note

