Army 365 SharePoint Online (SPO) & Data Migration – Organizational Data Clean-up

Version Number 1
As of 19 March 2024

Mr. Shauki Holmes

**Records and Publications
Manager/RHA Official
DHR, Administrative Service Division**

Course Outline

Introduction

- Step 1- ARIMS Account Creation

- Step 2- Identification / Inventory Files – Create Office Records List

- Step 3- Create Electronic Folders and Record Naming Convention

- Step 4- Data Migration from Shared Drive to
         SharePoint Online (SPO)

- Step 5- Q & A

ARIMS Account Creation

Account Creation

Create an Account- Registration

- Registration requires you to select an ARIMS Access Role. Unless you have been appointed to be a Records Coordinator, your role will be Action Officer.

- Part of the registration includes the identification of your office symbol. ARIMS uses office symbols to control which Office Records List individuals will use when electronically storing their documents.

- Your Records Coordinator will let you know your Office Symbol.

Account Creation/Access Roles

ARIMS Access Roles

Records Administrator (RA)

Administers records program at the ACOM, ASCC or DRU level

Records Manager (RM)

Administers records program throughout their command/garrison/organization

Records Holding Area Manager (RHAM)

Manages and directs the operations of an RHA facility

Records Coordinator (RC)

Creates and manages ORLs at the unit level and is the liaison to the RM

Action Officer (AO)

Receives, creates, and manages records within the office

Records Coordinators Memo

DEPARTMENT OF THE ARMY
US ARMY INSTALLATION MANAGEMENT COMMAND
HEADQUARTERS, US ARMY GARRISON, FORT SILL
4700 MOW-WAY ROAD, SUITE G35
FORT SILL, OKLAHOMA 73503

AMIM-SIH (380-5a)   DATE

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Records Coordinator Duty Appointment

1. Effective: ddmmmyy, name, is assigned as Records Coordinator (for name of organization).

2. References:

   a. Army Regulation (AR) 25-1, Army Knowledge Management and Information Technology Management, dated 15 July 2019.

   b. AR 25-400-2, The Army Records Information Management System, dated 2 October 2007.

   c. IMCOM Policy Memorandum 25-1, Records Management (RM) Procedures, dated 24 May 2016.

3. Purpose: To serve as Records Coordinator for organization name.

4. Period: ddmmmyy until officially relieved or released from appointment.

5. Cancellation: I retain the authority to cancel or withdrawal this appointment at any time. The appointment is cancelled upon the resignation, retirement, change of duties, or change of position of the specified individual.

6. Point of contact for this memorandum is the undersigned, at 580-XXX-XXXX.

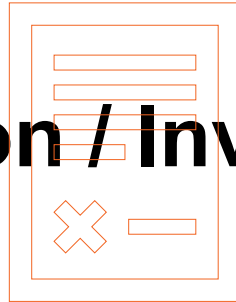   SIGNATURE BLOCK
                                                            Director

Electronically file as: RN 25-1d – Appointment Orders

Identification / Inventory Files

Identify Federal Records

What is a Federal Record?

Regardless of the Medium…

Any information <u>created or received</u> by an agency of the U.S. Government that <u>documents agency operations or other activities of the Government</u>.

Identify Federal Records

To help determine if a document is a Federal Record, ask yourself the following:

- Did you receive the document as a result of your job?

- Did you create or use this document to conduct or facilitate agency business?

- Did you put the document in an agency file?

- If not, did you still need to refer to this document later to conduct government business?

NOTE: When in DOUBT, treat it as a Record

Identify Federal Records

How can you tell if something is a record?

Is it used to conduct agency business?	Does it have informational value or serve as evidence of agency functions, policies, decisions or procedures?	Is it material from another office or outside agency upon which you took action?	Does it document any business actions such as, what was decided, or advice given?	Is it a unique document related to agency business?

It is a Record!

Keep in mind that while it is a record for you, it may be a record for someone else as well, which means there may be multiple record copies of the same material

For more information, see 36 CFR 1222.12 – "What types of documentary materials are Federal records?"

NOTE: Official Records that are "working files" can be stored on MS Teams for sharing with others, or "drafts". Once the record is finalized, that record should be stored on the SPO only.

Identify Non-Records

Non-records must be identified and filed separately from Official Records on shared drive and the SPO

How can you tell if something is a non-record?

- Is it uncirculated or draft material that does not contain substantive comments?
- Is it published or processed information used as reference?
- Is it a copy kept for convenience only?
- Is it maintained information that does not reflect program business?
- Is it junk mail or a document with no work-related value?

It is a non-record
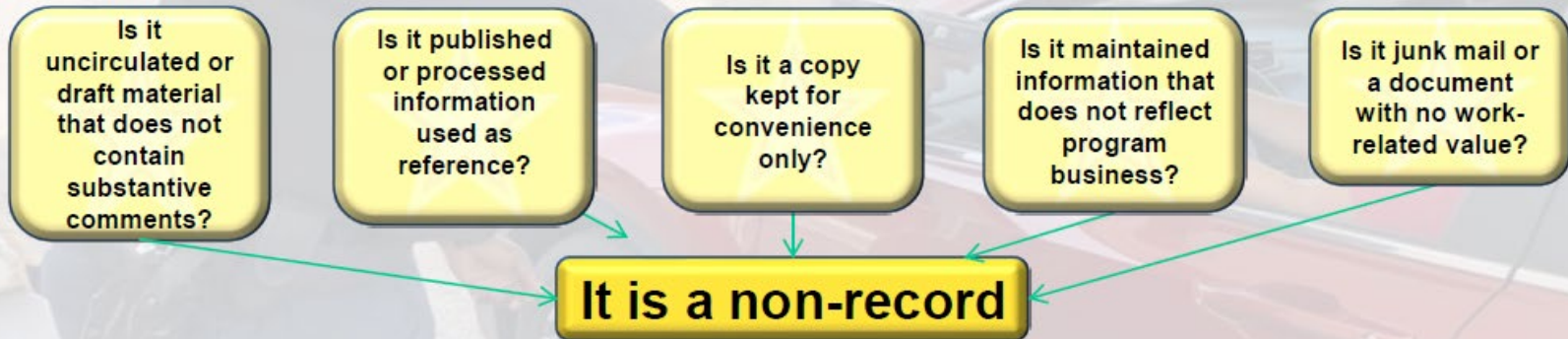
Non-records can be stored on MS One-Drive, MS Teams, desktop folders, etc…

Identify Personal Files

Personal papers, also referred to as "manuscripts," are defined in 36 CFR 1222.36(a) as:

Personal papers generally fall into the following three categories:

1. Materials accumulated before joining Government service not used to conduct Government business, such as personal reference material.

2. Materials relating solely to a person's ***private affairs*** *not related to agency business*, such as:
- **Private political associations**
- **Professional affiliations**
- **Family and personal correspondence, or**
- **Personal volunteer and community service information**

3. Work-related papers. These may:
- Include diaries, notes, and personal calendars that are not prepared, received, or used in the process of transacting agency business.
- Contains work related information but may be considered as personal papers if they serve only a person's own purposes and are not circulated throughout your organization.

NOTE: Personal files <u>ARE NOT ALLOWED</u> on the shared drive or SPO

Identify Federal Records

Objectives of the Inventory

- **Answer four basic questions:**
  - <u>Who</u> is currently creating, receiving, and maintaining records?
  - <u>What</u> is currently being kept to support the business process?
  - <u>Where</u> and <u>how</u> are the records stored and maintained?
  - <u>Why</u> are certain records stored and maintained?

- **Locate your organizations records:**
  - Centrally located (Hard copy Records)
  - Multiple buildings or offices (Hard copy Records)
  - Shared Drive (Electronic)

Office Records List (ORL)

Sample Inventory Spreadsheet

Record Sub-series	Records Number	Record Titles	Disposition Instructions	Location	Vital Records	Privacy Act
			ADMINISTRATIVE SERVICES DIVISION FILE PLAN			
			Administrative Office Records			
800D	1aa4	Current Employee Files	KEN. Event is when individual documents are superseded or no longer applicable. Review at end of each year and destroy applicable documents when event occurs.	ASD T: Drive Bldg 4700, Suite G06	N	Y
800D	1x2	Civilian Time & Attendance Files	KEN. Event is end of the following pay period. Keep in CFA until event occurs and then until no longer needed for conducting business, but not longer than 6 years after the event, then destroy.	ASD T: Drive Bldg 4700, Suite G06	N	Y
800D	1a	Office Records List	KEN. Event is when superseded or obsolete. Keep in CFA until event occurs and then until no longer needed for conducting business, but not longer than 6 years after the event, then destroy.	ASD T: Drive Bldg 4700, Suite G06	N	N
800D		Cross Reference Forms DA1613	KEN. Event is when superseded or obsolete. Keep in CFA until event occurs and then until no longer needed for conducting business, but not longer than 6 years after the event, then destroy.	ASD T: Drive Bldg 4700, Suite G06	N	N
800D	1	General administration correspondence	Event is 2 years after cutoff on action documents or when no longer needed for current operations for non-action documents; whichever applies. Keep in CFA until event occurs and then until no longer needed for conducting business, but not longer than 6 years after the event, then destroy.	ASD T: Drive Bldg 4700, Suite G06	N	N
800D	1jj	Reference Publications	KEN. Event is when superseded, obsolete, or no longer needed for reference purposes. Keep in CFA until event occurs and then until no longer needed for conducting business, but not longer than 6 years after the event, then destroy, except that accountable publications will be returned to supply channels	ASD T: Drive Bldg 4700, Suite G06	N	N

Identify Federal Records

Can Emails be Federal Records?

YES!!!

E-Mail messages are official records when they are created or received in the transaction of public/official business and are worthy of preservation.

Ex: *HQDA Execution Order 156-23 (ISO M-23-07 Update to Transition to Electronic Records), 21 September 2023.*

Identify Federal Records

Identify/ Inventory Files

- Under ARIMS, records are identified according to the primary directive that prescribes those records be created, maintained, and used.

- One only needs to know what the prescribing directive is for a specific program in order to locate the record/file numbers that should be applied to records created to support that program.

Identify Federal Records

RRS-A "Big Buckets" Structure

CONOPS 100	Installation Management 200	Operations and Security 300	Information Management 400	Medical 500	Personnel 600
100A	200A 200B 200C 200D	300A 300B 300C 300D	400A 400B 400C	500A 500B 500C	600A 600B 600C 600D 600E

Logistics 700	Administration 800	Emergency and Safety 900	Legal 1000	Finance and Audits 1100	Quality Assurance 1200
700A 700B 700C	800A 800B 800C 800D	900A 900B 900C	1000A 1000B	1100A 1100B	1200A 1200B 1200C 1200D
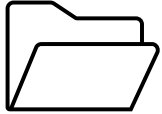
Create Electronic Folders and Record Naming Conventions

Electronic File Naming Conventions

DA PAM 25-403 Paragraph 4-15a (Army Guide to Recordkeeping)

Labeling electronic records. File names contain no spaces and no more than 255 characters in length.

Data elements will include:
(1) Access (Unclassified, CUI).
(2) Organization (office symbol). Supplement 1 AR 25-59
(3) Content (Name of the document).
(4) Date (current date by day, month and year).
(5) Versions (version V1, V2, V3, or F for final document).
(6) File Extensions (such as .docx, .pdf, .xlsx).
Examples:
U_AMIO_SharePointOnlineSOP_1Mar23_F.pdf = 41 characters
CUIPII_AMIO-CSD_RecallRoster_1Mar23_V1.xlsx = 43 characters
CUI_AMOP_MobilizationplansVital_1Mar23_V3.docx = 46 characters
U_AMIO-IMD-K_AmcRmTraining_28Feb23_V2.pdf = 41 characters

Electronic Filing

✓ **Remember, all electronic folders and federal records on your computers' shared drive are to be labeled IAW ARIMS regardless of format i.e., PDF, Word Doc, MS Excel Spreadsheets, etc..**

Electronic Filing
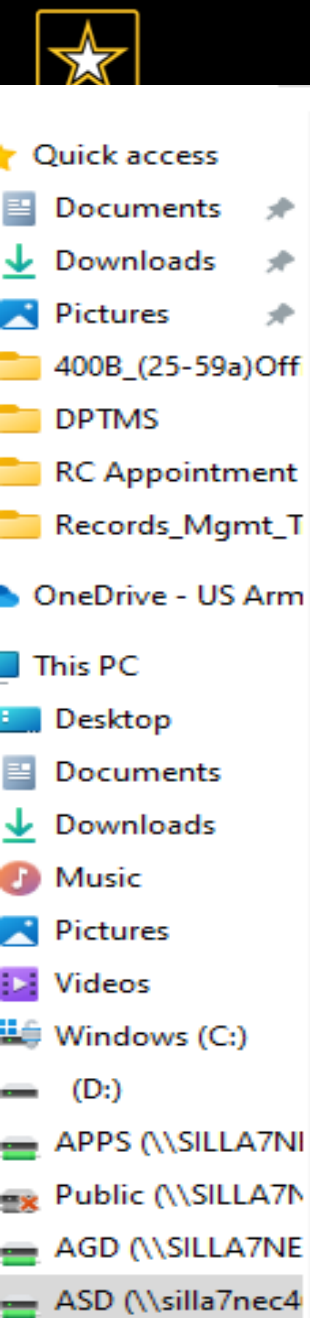
Name	Date mo
200A_(420-6b)SafetyandStatistics_(0-6)	3/15/20
300A_(380-5b)SecurityInspectionsandSurveys_(0-6)	1/22/20
300A_(380-5k2)DeclassificationofRecords_(K3yrs)	1/22/20
400B_(25)InformationManagement_(0-6)	2/26/20
400B_(25-1d)Duty_Appointment_Orders_(0-6)	2/6/2024
400B_(25-1i)RecordsManagement_(K6yrs)	3/21/20
400B_(25-22b2)FOIA&PA_(0-6)	12/13/20
400B_(25-30hh)Publication&FormsStocking,Warehousing,andInventorySvc(CLS 17.J)K1_(0-6)	1/22/20
400B_(25-30hh)Review&AuthenticateInstallation-LevelForms_(0-6)	1/22/20
400B_(25-30nn1)TrainingSlides_(0-6)	1/5/2024
400B_(25-30pp)Review&AuthenticateInstallation_Level Publications_(0-6)	3/22/20
400B_(25-59a)OfficeSymbolManagement_(K6yrs)	3/22/20
400B_(25-400-2d)InstallationRecordsHoldingArea_(6+)	3/21/20
400B_(25-400-2g)RecordsDisposition_(0-6)	12/22/20
400B_(25o1)InstallationRecordsHoldingArea_ PERM	3/19/20
500A_(40b)WorkplaceHealthAssessments_(K3 yrs)	1/22/20
600A_(RN600-8-3c)OfficialMailDistributionCenter_(0-6)	3/7/2024
600B_(690-400d)ASDTrainingCompleted_(K5)	12/28/20
700A_(710-2c)SupplyAccountability_(0-6)	1/18/20
800B_(11-2a3)InternalControls_(0-6)	1/18/20
800D_(1-20e)CongressionalsCorrespondence_(K2 then destroy)	1/3/2024
800D_(1a)OfficeRecordsList	12/26/20
800D_(1aa4)DivisionChief_(0-6)	12/11/20
800D_Adminstration&Housekeeping_(0-6)	2/1/2024
800D_6TP_(1-33a2)MemorializationActions_PERM	11/27/20

Quick access
- Documents
- Downloads
- Pictures
- 400B_(25-59a)Off
- DPTMS
- RC Appointment
- Records_Mgmt_T

OneDrive - US Arm

This PC
- Desktop
- Documents
- Downloads
- Music
- Pictures
- Videos
- Windows (C:)
- (D:)
- APPS (\\SILLA7NI
- Public (\\SILLA7N
- AGD (\\SILLA7NE
- ASD (\\silla7nec4

Be sure to use underscores and/or dashes to space out <u>records sub-series</u>, <u>records number</u>, and <u>record description</u>

Electronic Filing – Subfolders

Sub-folders can have conventional spaces in between words. No new naming convention is required. Basically, however your sub-folders are listed as of current can be used without change

Name	Date
800 (1bb) Job Descriptions (PA-N)	4/13/
800D (1aa4) Telework & Employee Records (PA-Y)	5/9/2
800D (1jj) Reference Publications (PA-N)	5/9/2
800D (1oo) SOP's (PA-N)	3/2/2
800D (RN1) Adminstration and Housekeeping (PA-N)	12/27
800D (RN1ii) Outprocessing FS Form 22 (PA-Y)	9/16/

Quick access

Documents

Downloads

Pictures

ARIMS Slide

Desktop

Official Records Naming Convention

As of current, all official records are to have a similar naming convention, as all IMCOM Garrison Organizations and Units will be transitioning to an Army SharePoint. See example below:

Name		Date mod
📄 U_AMIM-SIH_A_RC_MPD_DEERS_26OCT23_F.pdf		10/26/20
📄 U_AMIM-SIH-A_DHR-RCMemo_16DEC22_V1.docx		12/16/20
📄 U_AMIM-SIH_A_MEPHolmesARCISaccount_28MAY22_V1.docx		5/28/202

Army Destruction Certification

ARMY DESTRUCTION CERTIFICATE
For use of this form, see DA PAM 25-403; the proponent agency is CIO.

UIC/Office Symbol/Organization/Office	Records Administrator/Manager(s)
ex: W6CSAA/AMIM-SIH-A/ADMINISTRATIVE SERVICES DIVISION	Place name of RM or RA in this block. This information can be found in the ARIMS Account Tab.

INFORMATION ON RECORDS DESTROYED

|	Army Record Number and Title Records Retention Schedule (RSS–A)	Record Disposition	Disposition Authority	Record Date Range	Location (Room / Office / Cabinet Number) Electronic or Automated Information System	Volume	Destruction Method (Hard Copy: Shred / Delete) (Electronic: Purge / Delete)
+ ▲ ▼ -	RN380-5k2 - ADA Letter of Certification/ Declassification	K3. Keep in CFA until record is 3 years old, then destroy.	NC1-AU-78-117 (This can be found in the ARIMS records Instructions for that particular records number in block 1 of this form).	Oct 2019 - Nov 2022	Bldg 4700, Suite G06 Fort Sill, OK 73503	Electronic	Delete
+ ▲ ▼ -	RN: 1v1 - Access controls - Appointment documents, access rosters, and local control procedures	KEN. Event is when superseded. Keep in CFA until event occurs and then until no longer needed for conducting business, but not longer than 6 years after the event, then destroy.	GRS 5.6 items 110/111 (DAA-GRS-2017-0006-014/015	Jan 2018 - Jan 2024	Bldg 4700, Suite G06 Fort Sill, OK 73503	Electronic	Delete

SIGNATURES

I certify that the records listed above have been retained for the approved retention schedule (RSS–A), required audits have been completed, and no pending or ongoing litigation or investigation involving these records is known to exist. I have completed records management training and am aware of the Army's guidance for managing records and premature destruction of Government record penalties.

Records Coordinator / Records Manager or System Owner Name: Name of Office Records Coordinator	Signature:	Date (YYYYMMDD):
Name (Approved By): YOUR SUPERVISOR/MANAGER	Signature:	Date (YYYYMMDD):
Name (Destroyed By): WHOMEVER IS DESTROYING OR DELETING RECORD	Signature:	Date (YYYYMMDD):

NOTE: Official Army Records that are due for disposition MUST be listed on DA Form 7914 prior to destruction, regardless of medium.
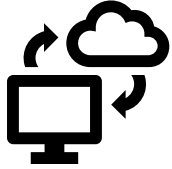
Data Migration from Shared Drive to SharePoint Online (SPO)

UNCLASSIFIED//FOUO

Data Migration from Shared Drive to SharePoint Online (SPO)

armyeitaas.sharepoint-mil.us/sites/IMCOM-ODT-Sill

SharePoint | Search this site

ID-T USAG Fort Sill

⭐ Following

Home| Support Menu

Ft Sill - SPO Org Data - R...

Read Me! | How To Videos

GCMD-GRP

DHR

EEO

IMO

IRACO

ILO

ISO

PAIO

PAO

RMO

RSO

Site contents

Recycle bin

Standard Mandatory DoD Notice and Consent

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.

At any time, the USG may inspect and seize data stored on this IS.

==Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.==

This includes security measures (e.g., authentication and access controls) to protect USG interests – not for your personal benefit or privacy.

Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential.

==Any "user entered" personal information collected, stored, protected, or disseminated within Army365 is the responsibility of the record owner/originator of the information to ensure its properly protected, categorized, covered under an existing system and maintained in accordance with AR 25-400-2, Army Records Information Management System (ARIMS).==

Visit the Army Records Management Directorate for additional information/guidance: https://www.rmda.army.mil

Use Navigation Menu on left or select >> ID-T USAG Fort Sill - Documents - All Documents (sharepoint-mil.us)

Shauki Holmes/ 580-442-6573/ shauki.m.holmes.civ@army.mil | **26 of 109** | 6 FEB 24_V4

Data Migration from Shared Drive to SharePoint Online (SPO)

Data Migration from Shared Drive to SharePoint Online (SPO)

DHR-Office Symbol > **ASD-AMIM-SIH-A**

🗋	Name ∨	Modified ∨	Modified By ∨	+ Add column
📁	200A_(420-6b)SafetyandStatistics_(0-6)	5 days ago	Holmes, Shauki M CIV US/	
📁	300A_(380-5b)SecurityInspectionsandSurveys_(0-6)	5 days ago	Holmes, Shauki M CIV US/	
📁	300A_(380-5k2)DeclassificationofRecords_(K3yrs)	5 days ago	Holmes, Shauki M CIV US/	
📁	400B_(25)InformationManagement_(0-6)	5 days ago	Holmes, Shauki M CIV US/	
📁	400B_(25-1d)Duty_Appointment_Orders_(0-6)	4 days ago	Holmes, Shauki M CIV US/	

QUESTIONS

CONTACT INFORMATION

Mr. Shauki M. Holmes

Fort Sill Garrison Records and Publications Manager

DHR Admin Services Division

Email - shauki.m.holmes.civ@army.mil

Bldg 4700, Room G-06

(580) 442-6573