

Welcome to WESTARM!

The Westchester County Archives and Records Center's
Archives and Records Management System

Through a combination of written instructions and screen-shots, this User's Manual will assist Records Coordinators and other authorized departmental Records Center users in learning the WESTARM system, and will serve as a reference manual in the future as new record transfers are made to the Records Center.

During the initial introduction period, any questions or comments about WESTARM should be directed to: Stephanie Chavarri
Records Center Manager
sgc2@westchestercountyny.gov
(914) 231-1508

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WESTARM USER'S MANUAL

SIGNING ON TO WESTARM AND SELECTING A RECORD TYPE

The web address for WESTARM is : <http://wgapps/Westar/Default.asp>

If you think that you will be using WESTARM frequently, you may want to make this a permanent shortcut on your computer's desktop. Otherwise, you can simply type in the URL each time you need to access WESTARM, or access WESTARM through the Records Center's page on the County's intranet. Please note that WESTARM can only be accessed from a County computer.

The three screen shots in this section of the user's manual show the first and second screens that you will see when you first enter the WESTARM program.

Use the drop-down menu on the "Department Name" line to find your department name. You will have been informed by the Records Center staff what your user ID and password are. In most instances, your user id will be the same as your County user id. Your password for WESTARM is unique to the WESTARM program and **is not** the same password you use to sign onto your computer. If you forget what your password is, contact the Records Center staff.

After entering the correct user ID and password, and clicking the "Sign In" button, you will progress to the second screen. Select the correct Record Type from the drop-down menu. Some users may have only one Record Type to choose from, while others may have more than one. *Note:* If you have more than one record type to choose from, please make sure that you are selecting the correct record type for the records you wish to work with. Failure to do so will result in the rejection of transfer sheets, the inability to locate previously stored records, and other confusion. If you have any question about what record type you should be using for a given group of records, please contact the Records Center staff.



WESTARM

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Welcome to WESTARM, the online records management system for all county departments. By using it with care and attention to your departmental records retention schedules, your department's documents will be transferred safely to the Records Center, delivered back to you efficiently whenever requested and, when ready for destruction, disposed of in a confidential and secure manner.

Per county statute, the inactive records stored at the Records Center's facilities remain the property of your department. Only if and when a record is formally transferred by your Commissioner to the Archives does your responsibility end.

To enter WESTARM, first select your department's name from the dropdown menu. Add your user i.d. and password. Click Sign In.

If you experience any difficulty, contact the Records Center at 231-1520.




Department Name:

User ID:

Password:

Sign In

Reset



Welcome to WESTARM
using it with care and attention. All documents will be transferred to the appropriate department requested and, when ready, will be available to you.

Per county statute, the information in your department. Only if a document does your responsibility extend to the Archives.

To enter WESTARM, first select your department. Click Sign In.

If you experience any difficulties, please contact your system administrator.

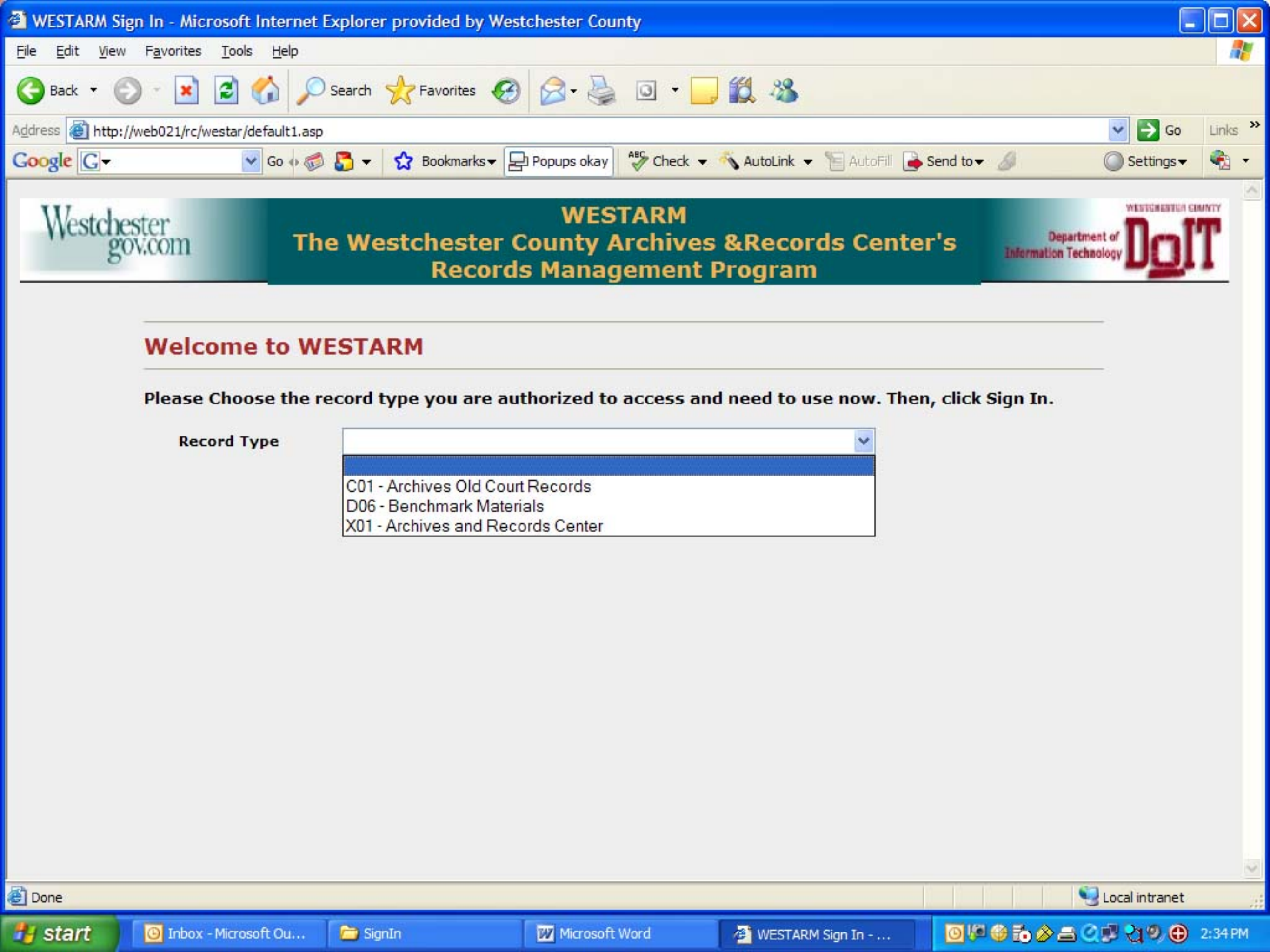
Department Name:

User ID:

Password:

Sign In **Reset**

- Acquisition & Contract
- Board of Elections
- Board of Legislators
- Budget Office
- Bureau of Purchase and Supply
- Calendar Clerk
- Commissioner of Jurors
- Community College
- Community Mental Health
- Consumer Protection
- Corrections
- County Clerk
- County Executive
- District Attorney
- Environmental Facilities
- Family Court
- Finance
- Government Relations
- Health
- Industrial Development Agency
- Information Technology**
- Investment in Kids
- Juvenile Justice
- Laboratories and Research
- Law Department
- Medical Center
- Office for the Disabled
- Office for Women



Welcome to WESTARM

Please Choose the record type you are authorized to access and need to use now. Then, click Sign In.

Record Type

C01 - Archives Old Court Records
D06 - Benchmark Materials
X01 - Archives and Records Center

WESTARM USER'S MANUAL

CREATING NEW TRANSFER LISTS

Once you have signed on to WESTARM and selected the correct Record Type for the records that you wish to create a Transfer List for, to begin the Transfer List process, select the “New” option, under the “Transfer” option on the left-hand side of the main welcome page.

The next page that will appear is informational, displaying departmental information. If you discover any errors in the information shown, please contact the Records Center so that the information can be corrected. Simply click “Continue” on this page.

The second page displays the “Transfer List #”. Note down the number in an easy to remember place. You will need that number in the event that you need to go back and edit the Transfer List once you have submitted it to the Records Center, or if you otherwise need to refer to it in the future.

The third page displayed is the main data entry page. The Transfer List # will automatically be displayed. The other fields on the Transfer List are: Box #, Box Description, From Date, To Date, and Retention Code. All of these fields must be filled in for each and every box included on the Transfer List. The WESTARM system will not allow a box to be saved if any of these fields are left blank.

The following rules / suggestions apply for the fields to be completed for each box:

Box #:

- In the past, the Record Center has assigned box numbers consecutively within each department as boxes were sent to the Records Center. With the WESTARM system, this will no longer be the case. Boxes will be assigned consecutive “Inventory Control” numbers as they

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CREATING NEW TRANSFER LISTS

are received by the Records Center, regardless of what department they are received from. However, when creating Transfer Lists, the numbering system within each department is being retained. The next starting box number (which is different from the "Inventory Control" number which will later be assigned by the Records Center) will be displayed at the top of the main data entry screen. Use this number in the "Box #" field, and increase it by one for each consecutive box entered.

- *Note: If there are outstanding Transfer Lists that have not yet been approved by the Records Center, the box number shown will not be the correct "next" box number to use. The likelihood of this happening without your knowledge increases if you work in a department that has multiple users creating transfer sheets for the same record type at the same time. In that situation, be sure to always check the "Pending/Draft" transfer sheet listing before creating a new Transfer List to make sure you are using the correct Box number for your Transfer List.*
- Each Transfer List can have up to 60 boxes included in it.
- All Box #s must be three digits.

Box Description:

- The Box Description field can be up to 200 characters long.
- It is recommended that if the records being entered are the same type, that the same description be used for them. There is a search function available within the WESTARM system [see the "Search" heading on the left-hand side of the page]. If the same description is

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CREATING NEW TRANSFER LISTS

used for similar records, in the event that all similar records need to be retrieved from the Records Center, or otherwise located, using the same description for them will make this task much easier.

- The use of abbreviations, unless space is an issue, is discouraged. As noted above, there is a search function available within the WESTARM system, and unless everyone knows, and uses, the same abbreviations, locating records that have been described using abbreviations may not easily be found when needed.
- All Box Descriptions must include the **date(s)** of the records. This will make it much easier to identify the records that are in the boxes. Transfer lists submitted without date information in the Box Descriptions will be rejected. If it is not possible to determine the exact date of the records (or would be confusing to include them in the Box Description), then the Box Description should conclude with information on when the records were sent to the Records Center. For example "Various closed legal cases, sent to the Records Center April 2008". Although this is not ideal, at least it gives some information about when the records were last looked at / dealt with. (*See additional comments below under "From Date" and "To Date"*)
- No formatting should be attempted on the text in the Box Description field (such as using the "Enter" key to try to set up paragraphs). The Box Description field is part of a larger database and it is not possible to format fields in a database. If you wish to set off information in the Box Description field, use keyboard characters such as dashes (--), hyphens (–), colons (:); semicolons (;), etc.

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CREATING NEW TRANSFER LISTS

From Date:

- The “From Date” is the earliest date of the records in the box. The format is MM/DD/YYYY.
- If the date of the records in the box is only given as a year (or years), for example, 2000, then the “From Date” should be January 1 of that year – in this example: 01/01/2000. Similarly, if only a month is given as the date of the records, the “From Date” should be the first of the month. For example March 2000 should be entered as 03/01/2000.
- If the date of the records is unknown – and it is strongly discouraged by the Records Center to send records with unknown dates – as a last resort the date that the records are being sent to the Records Center can be used. In that case, a note to that effect should be included in the Box Description. For example: (Sent to Records Center October 23, 2007) and then the “From Date” and “To Date” will both be 10/23/2007.

To Date:

- The “To Date” is the latest date of the records in the box. The format is MM/DD/YYYY. **It is from this date that the Disposition Date of the records is determined, based on the retention period assigned by the appropriate New York State Disposition and Retention Schedule. Therefore, it is extremely important that this date be as accurate as possible.**
- If the date of the records in the box is only a year (or years), for example, 2000, then the “To Date” should be December 31 of that year – in this example: 12/31/2000. Similarly, if only a

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CREATING NEW TRANSFER LISTS

month is given as the date of the records, the “To Date” should be the last of the month. For example March 2000 should be entered as 03/31/2000. (Remember “30 days have September, April, May, and November, all the rest have 31, excepting February which alone has 28, and one day more we add to it each year in four.” ☺ ☺)

- If the date of the records is unknown – and it is strongly discouraged by the Records Center to send records with unknown dates – as a last resort the date that the records are being sent to the Records Center can be used. In that case, a note to that effect should be included in the Box Description. For example: (Sent to Records Center October 23, 2007) and then the “From Date” and “To Date” will both be 10/23/2007. **Please note that using this method will extend the retention period of the records and increase the cost of storage of these records.**

Retention Code:

- There is a drop-down menu to use to select the appropriate retention code for the records in the box. Only one retention code can be assigned for each box. It has always been the policy of the Records Center that only records with the same retention code should be stored in the same box. This prevents records from being stored longer than necessary when half of them in the box are ready for disposition, but the others need to be retained for a longer period. This now becomes imperative because only one retention code can be assigned per box.
- All boxes must have a retention code assigned to them in order to be sent to the Records Center. It is not sufficient to simply assign a disposition date.

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CREATING NEW TRANSFER LISTS

- If you are unsure of the appropriate retention code for the records in the box, please contact the Records Center staff.
- If you are unable to locate the appropriate retention code in the list of retention codes, please contact the Records Center staff.
- Once you have assigned a retention code and saved the box, the projected disposition date will appear in the “Boxes View” portion of the “Box Information” screen. If you have any questions about the assigned “Disposition Date” (which is based on the time periods in the State Disposition and Retention Schedule), please contact the Records Center staff.
- **Note: The CO-2 Records Retention and Disposition Schedule has been adopted by the Westchester County Board of Legislators as the retention policy to be followed by all Westchester County departments. Deviations from this schedule should not be made without written explanation as to why by the head of the department making the departure from the CO-2.**

Once all boxes have been added to a Transfer List, all folders added (if necessary – see separate section), and all necessary edits made (see separate section), the Transfer List is ready to be submitted to the Records Center for approval. To do this, select the “Send Finished Transfer List to Records Center” button at the top of the main data entry page.

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CREATING NEW TRANSFER LISTS

After receiving notification that new Transfer Lists have been received from a department, the Records Center staff will review them, approve or reject them (usually reserved for instances when there are problems with the retention code(s) or the dates of the records), assign final box numbers to the boxes, print out and provide box labels to the department, and provide final copies of the Transfer Lists with the final box numbers.

Once the department receives the labels, pick-up of the boxes for transfer to the Records Center can be scheduled.

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Welcome
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Technology

SEARCH

[BY BOX NAME](#)
[BY ORIGINAL BOX#](#)
[BY BOX LISTING](#)
[BY FOLDER NAME](#)
[BY FILE NUMBER](#)

TRANSFER**NEW**

[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

To create a new Transfer List, select the "New" button, under the "Transfer" option

Welcome cks1 to Archives and Records Center ,Information Technology. You may now search the records under your authority and either prepare a transfer sheet or request a delivery of records back to you. Follow the instructions provided below. If you have any questions, contact the Records Center Staff at 231-1520.

SEARCH: Click [By Box Name](#) to search box information using any portion of a box name; Click [By Original Box #](#) to search box information using the box numbers assigned to boxes before the WESTARM system was implemented; or Click [By Box Listing](#) to view a complete listing of boxes in this record type. Click [By File Name](#) to search for individual files within boxes using any portion of the file name or Click [By File Number](#) to search for individual files using their file number

TRANSFER: Click [New](#) to send a new transfer list; Click [Pending/Draft](#) to send or edit pending or unfinished transfer lists.

DELIVERY REQUEST: Click [New \(Select #\)](#) to send new delivery requests by selecting inventory control #'s from a drop-down listing; Click [New \(Enter#\)](#) to send new delivery requests by entering the exact inventory control #; Click [Pending](#) to resend or edit any pending delivery requests. Click [Recent](#) to view and print delivery requests made within the last 90 days. Click [Outstanding](#) to see items currently charged out to your department. Click [Schedule Pickup](#) to send a notice to the Records Center that a box or file already in the system is ready to be transferred back to storage.

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SEARCH

[BY BOX NAME](#)
[BY ORIGINAL BOX#](#)
[BY BOX LISTING](#)
[BY FOLDER NAME](#)
[BY FILE NUMBER](#)

TRANSFER

[NEW](#)
[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

New Transfer Form

Please chose the Address and Department Officer, then click the **Continue** button.

Department Code:	<input type="text" value="X01"/>
Department Name:	<input type="text" value="Information Technology"/>
Address:	<input type="text" value="Room 908, 148 Martine Avenue,White Plains.NY 10601"/>
Department Officer:	<input type="text" value="Dr. Norman J. Jacknis - Chief Informatio"/>
Record Coordinator E-Mail:	<input type="text" value="cks1@westchestergov.com"/>
Submit Date:	<input type="text" value="10/23/2007"/>
	<input type="button" value="Continue"/> <input type="button" value="Reset"/>

New transfer sheet page 1 -- Click "Continue" button to go to next page.

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SEARCH

[BY BOX NAME](#)
[BY ORIGINAL BOX#](#)
[BY BOX LISTING](#)
[BY FOLDER NAME](#)
[BY FILE NUMBER](#)

TRANSFER

[NEW](#)
[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

Transfer Information

Here is your transfer request information. Please click the **Continue** button to enter your box list or Click the back arrow on your toolbar.

Transfer List #:

Department Code: X01

Address: Room 908, 148 Martine Avenue, White Plains, NY 10601

Department Officer: Dr. Norman J. Jacknis - Chief Information Officer

Record Coordinator E-Mail: cks1@westchestergov.com

Submit Date: 10/23/2007

Note down "Transfer List #" in a convenient place, and click "Continue" button.

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SEARCH

[BY BOX NAME](#)[BY ORIGINAL BOX#](#)[BY BOX LISTING](#)[BY FOLDER NAME](#)[BY FILE NUMBER](#)[BY RETENTION CODE](#)

TRANSFER

[NEW](#)[PENDING/DRAFT](#)[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)[NEW \(ENTER #\)](#)[PENDING](#)[RECENT](#)[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)[HOME](#)[SIGN OFF](#)

Box Information

Use this information to number the boxes in the Transfer List. Just be sure to check the "Pending/Draft" listing if there are any others in your department who create transfer lists to make sure that they have not already used this number. In that case, use the number after their last number.

Click the **Save Box** button after entering each box. You may enter up to 60 boxes per transfer. Click Box # to edit that box. Click Box # Files Entry to enter files for that box. Go below to Boxes View to preview your transfer list. You may print a draft transfer from Crystal Reports. When all the boxes are entered, Click the **e-mail** button. Click here to [Print Draft Transfer](#)

The last number used for your boxes was 10010. Please start your transfer sheet with **box# 10011**. But first, PLEASE CHECK that there are no PENDING Transfer sheets starting with that number. If there are, please contact the Record Center.

Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	*Select Retention Code
<input type="text" value="0800022"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			<input type="button" value="Save Box"/>	<input type="button" value="Email"/>	

* Click on the following **Retention Schedules** to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.

Click on [CO-2](#), revised in 2006, to obtain retention information concerning records from all Westchester County Departments.

Click on [MI-1](#), revised in 2006, to obtain retention information concerning the public health records from the Westchester County Health & Hospitals Center, a public benefit corporation.

Click on [BOE](#), 1996 to obtain retention information concerning Board of Elections records.



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[BY BOX NAME](#)

[BY ORIGINAL BOX#](#)

[BY BOX LISTING](#)

[BY FOLDER NAME](#)

[BY FILE NUMBER](#)

TRANSFER

[NEW](#)

[PENDING/DRAFT](#)

[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)

[NEW \(ENTER #\)](#)

[PENDING](#)

[RECENT](#)

[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)

[HOME](#)

[SIGN OFF](#)

Box Information

Click the **Save Box** button after entering each box. You may enter up to 60 boxes per transfer that box. Click **Box # Files Entry** to enter files for that box. Go below to **Boxes View** to preview. You may print a draft transfer from Crystal Reports. When all the boxes are entered, Click the **Click here to [Print Draft Transfer](#)**

Box				
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)
<input type="text" value="0707852"/>	<input type="text" value="001"/>	<input type="text" value="Sample box"/>	<input type="text" value="01/01/2000"/>	<input type="text" value="12/31/2000"/>
			<input type="button" value="Save Box"/>	<input type="button" value="Email"/>

* Click on the following **Retention Schedules** to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.

Click on [CO-2](#), revised in 2002, to obtain retention information concerning records from all Westchester County Departments.

Click on [MI-1](#), revised in 2002, to obtain retention information concerning the public health records from the Westchester County Health & Hospitals Center, a public benefit corporation.

Click on [BOE](#), 1996 to obtain retention information concerning Board of Elections records.

Click on [Surrogate](#), to obtain retention information concerning Surrogate Court records.

Click on [Civil](#) or [Criminal](#) to obtain retention information concerning County Court records.

OCA 20550
0000
0001
BOE 90050
BOE 90052
BOE 90055
BOE 90060
BOE 90061
BOE 90064
BOE 90068
BOE 90073
BOE 90074
BOE 90079
BOE 90081
BOE 90087
BOE 90088
BOE 90096
BOE 90097
CO 214b
CO2 1
CO2 2a
CO2 2b
CO2 3
CO2 4
CO2 5
CO2 6
CO2 7
CO2 8a
CO2 8b



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[BY BOX LISTING](#)
[BY FOLDER NAME](#)
[BY FILE NUMBER](#)

TRANSFER

[NEW](#)
[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	*Select Retention Code
0707852		Sample box	01/01/2000	12/31/2000	CO2 10b
			Save Box	Email	

* Click on the following **Retention Schedules** to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.

Click on [CO-2](#), revised in 2002, to obtain retention information concerning records from all Westchester County Departments.

Click on [MI-1](#), revised in 2002, to obtain retention information concerning the public health records from the Westchester County Health & Hospitals Center, a public benefit corporation.

Click on [BOE](#), 1996 to obtain retention information concerning Board of Elections records.

Click on [Surrogate](#), to obtain retention information concerning Surrogate Court records.

Click on [Civil](#) or [Criminal](#) to obtain retention information concerning County Court records.

Once a box is saved, its Disposition Date is calculated based on its "To Date" and the retention period specified by the selected Retention Code

Boxes View

Transfer List #	Box #	Box Description	From Date	To Date	RetentionCode	Disposition Date	Box Edit	Files Entry
0707852	001	Sample box	1/1/2000	12/31/2000	CO2 10b	12/31/2006	Box # 001	Box # 001Files

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BY ORIGINAL BOX#
BY BOX LISTING
BY FOLDER NAME
BY FILE NUMBER
BY RETENTION CODE

TRANSFER

NEW
PENDING/DRAFT
SCHEDULE PICKUP
DELIVERY REQUEST

NEW (SELECT #)
NEW (ENTER #)
PENDING
RECENT
OUTSTANDING

BACK

CHOOSE RECORD TYPE
HOME
SIGN OFF

Box Information

SEND FINISHED TRANSFER LIST TO RECORD CENTER

Once you have completed your transfer list, use this button to send the Transfer List to the Records Center

Click the **Save Box** button after entering each box. You may enter up to 60 boxes per transfer. Click Box # to edit that box. Click Box # Files Entry to enter files for that box. Go below to Boxes view to preview your transfer list. You may print a draft transfer from Crystal Reports. When all the boxes are entered, Click the **e-mail** button. Click here to [Print Draft Transfer](#)

The last number used for your boxes was 1111. Please start your transfer sheet with box# **1112**. But first, PLEASE CHECK that there are no PENDING Transfer sheets starting with that number. If there are, please contact the Record Center.

Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	*Select Retention Code
0800382					
			Save Box		

* Click on the following **Retention Schedules** to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.

Click on [CO-2](#), revised in 2006, to obtain retention information concerning records from all Westchester County Departments.

Click on [MI-1](#), revised in 2006, to obtain retention information concerning the public health records from the Westchester County Health & Hospitals Center, a public benefit corporation.

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[BY FOLDER NAME](#)
[BY FILE NUMBER](#)

TRANSFER

[NEW](#)
[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

Notify the Records Center about your Transfer List

Please go back if you did not finish entering all your box and file information. Otherwise Please type an E-Mail message, if you wish, and click the **Send** button.

From: cks1@westchestergov.com
To: cag4@westchestergov.com
Cc: cks1@westchestergov.com
Subject: Transfer # 0707853 from Information Technology.

Use this box to include any special information about the boxes included on your transfer list -- for example, if they need to be retained longer than the assigned state retention period. This information will be included about the records by the Records Center staff once the transfer lists are approved.

Send

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EDITING TRANSFER LISTS

Whenever data entry is being done, some typographical errors are inevitable. With the WESTARM system, however, correcting them is an easy task. To do this, as you are reviewing the list of boxes in the "Boxes View" in the Transfer List on the screen, simply select the box number to be edited from the "Box Edit" column. [If the draft Transfer List has been printed out to be reviewed and you are no longer in the WESTARM system, you can return to the appropriate Transfer List through the list of "Pending/Draft" transfer lists from the main welcome page. Simply select the appropriate Transfer List # from the list that appears and then proceed to select the necessary box number that needs to be edited.]

The Box Edit screen will allow changes to the Box Description, the From Date, To Date, and Retention Code. If for some reason an error was made in the Box #, the entire box needs to be deleted and the entire record re-entered.

If any errors are discovered in box information after a Transfer List has been submitted to the Records Center and the Transfer List has been approved, then the Records Center staff must make the changes to the box information. Please contact the Records Center if such a situation occurs.

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TRANSFER

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DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

To go back and select a draft Transfer List to edit, or to submit to the Records Center for approval, select "Pending/Draft" under the "Transfer" option

Welcome cks1 to Archives and Records Center ,Information Technology. You may now search the records under your authority and either prepare a transfer sheet or request a delivery of records back to you. Follow the instructions provided below. If you have any questions, contact the Records Center Staff at 231-1520.

SEARCH: Click [By Box Name](#) to search box information using any portion of a box name; Click [By Original Box #](#) to search box information using the box numbers assigned to boxes before the WESTARM system was implemented; or Click [By Box Listing](#) to view a complete listing of boxes in this record type. Click [By File Name](#) to search for individual files within boxes using any portion of the file name or Click [By File Number](#) to search for individual files using their file number

TRANSFER: Click [New](#) to send a new transfer list; Click [Pending/Draft](#) to send or edit pending or unfinished transfer lists.

DELIVERY REQUEST: Click [New \(Select #\)](#) to send new delivery requests by selecting inventory control #'s from a drop-down listing; Click [New \(Enter#\)](#) to send new delivery requests by entering the exact inventory control #; Click [Pending](#) to resend or edit any pending delivery requests. Click [Recent](#) to view and print delivery requests made within the last 90 days. Click [Outstanding](#) to see items currently charged out to your department. Click [Schedule Pickup](#) to send a notice to the Records Center that a box or file already in the system is ready to be transferred back to storage.

Welcome
cks1 to Information Technology

SEARCH

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TRANSFER

[NEW](#)
[PENDING/DRAFT](#)
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DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
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Pending Transfers and Drafts

Please Click the **Draft #** to edit that draft transfer.

Department Code:

Department Name:

Transfer List #	Submit Date	Reject	Draft Edit	Delete Draft
0707853	10/23/2007		Draft # 0707853	Draft # 0707853
0707852	10/23/2007		Draft # 0707852	Draft # 0707852

WESTARM

The Westchester County Archives & Records Center's Records Management Program

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DELIVERY REQUEST

[NEW \(SELECT #\)](#)
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Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	*Select Retention Code
0707852		Sample box	01/01/2000	12/31/2000	CO2 10b
			Save Box	Email	

*** Click on the following Retention Schedules to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.**

Click on CO-2, revised in 2002, to obtain retention information concerning records from all Westchester County Departments.

Click on MI-1, revised in 2002, to obtain retention information concerning the public health records from the Westchester County Health & Hospitals Center, a public benefit corporation.

Click on BOE, 1996 to obtain retention information concerning Board of Elections records.

Click on Surrogate, to obtain retention information concerning Surrogate Court records.

Click on Civil or Criminal to obtain retention information concerning County Court records.

To edit the data entered for a particular box, select the box number in the "Box Edit" column

Boxes View

Transfer List #	Box #	Box Description	From Date	To Date	RetentionCode	Disposition Date	Box Edit	Files Entry
0707852	001	Sample box	1/1/2000	12/31/2000	CO2 10b	12/31/2006	Box # 001	Box # 001Files

Welcome
cks1 to Information Technology

SEARCH

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DELIVERY REQUEST

[NEW \(SELECT #\)](#)
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Box Edit

Go back to Box Information Screen.

Click the **Delete** button to delete the box. Click the **Update** button to save the box data after editing.

Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	Retention Code
<input type="text" value="0707852"/>	<input type="text" value="001"/>	<input type="text" value="Sample box"/>	<input type="text" value="1/1/2000"/>	<input type="text" value="12/31/2000"/>	<input type="text" value="CO2 10b"/>
		<input type="button" value="Update"/>	<input type="button" value="Delete"/>	<input type="button" value="Reset"/>	

Use this screen to edit the Box Description, From Date, To Date, or Retention Code. Click "Update" when finished.

If the Box # needs to be changed, the box must be DELETED and then re-entered.

WESTARM USER'S MANUAL

ADDING FOLDER INFORMATION FOR INDIVIDUAL BOXES

One of the main advantages of the WESTARM system is that it allows for searching folder level information about records stored at the Records Center. It is strongly encouraged that departments that regularly request folders to be retrieved from their stored boxes use this feature when creating new transfer lists. Other departments are also encouraged to use this feature as an easy way to know exactly what records they have in storage, and in order to be able to make more informed decisions when they are asked about the final disposition of their records. However, entering folder information into WESTARM is not a requirement.

To enter file information for any box, select the “Files Entry” link for that box at the far right-hand side of the main data entry screen.¹

File information can be entered in one of two ways: (1) individually, file by file, or (2) as a range of files. This latter function is particularly useful for departments that have boxes that contain ranges of case files. In order to enter individual files, simply enter in the single file number, then the file name and save the file. File numbers, unlike box numbers, can be single digits, and in fact should not have zeros at the beginning of them. Please note that only numbers can be entered in the “Single File #” field. If you have a file numbering system that uses alphabetical characters, please contact the Records Center to discuss your options for entering file information into WESTARM.

To enter a range of file numbers, enter the first file number, the last file number and the file name that should appear for each file in that range. The file numbers will appear at the end of each of the file names. For example, case files 20-30 of 1995 should be entered as First File # 20, Last File # 30 and

¹Because WESTARM repeats the information from each previous box whenever a box record is saved (in order to aid in data entry when similar records are being entered on the same Transfer List) it is recommended that the file information not be entered until all boxes are entered into the Transfer List. Entering in file information after each box is entered will interrupt with the automatic repetition process for the box data entry fields.

WESTARM USER'S MANUAL

ADDING FOLDER INFORMATION FOR INDIVIDUAL BOXES

File Name Case Files 1995- The resulting file names will be: Case Files 1995-20, Case Files 1995-21, Case Files 1995-22, etc.

File information is edited in the same manner as box information. There is a "File Edit" column that can be clicked for the appropriate file that needs to be edited. Only the file name information can be edited. If a file number needs to be changed, the entire file must be deleted and re-entered.

It has been the experience of the Records Center during retroactive data entry, that on occasion when using the file range method of entering files, that on occasion date entry errors led to the accidental entry of hundreds (and sometimes thousands) of incorrect file numbers for a box. If this occurs during file entry, it is not necessary for the departmental user to delete each individual record – and often this is not even possible because an error message will be displayed. In such an event, please contact the Records Center with the Transfer List # and Box # and we will be happy to correct this error for you on the database side of the program.

WESTARM

The Westchester County Archives & Records Center's Records Management Program

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[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
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[RECENT](#)
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[HOME](#)
[SIGN OFF](#)

Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	*Select Retention Code
0707852		Sample box	01/01/2000	12/31/2000	CO2 10b
			Save Box	Email	

*** Click on the following Retention Schedules to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.**

Click on CO-2, revised in 2002, to obtain retention information concerning records from all Westchester County Departments.

Click on MI-1, revised in 2002, to obtain retention information concerning the public health records from the Westchester County Health & Hospitals Center, a public benefit corporation.

Click on BOE, 1996 to obtain retention information concerning Board of Elections records.

Click on Surrogate, to obtain retention information concerning Surrogate Court records.

Click on Civil or Criminal to obtain retention information concerning County Court records.

To enter folder information for a box, select the "Files Entry" link for that box

Boxes View

Transfer List #	Box #	Box Description	From Date	To Date	RetentionCode	Disposition Date	Box Edit	Files Entry
0707852	001	Sample box	1/1/2000	12/31/2000	CO2 10b	12/31/2006	Box # 001	Box # 001Files

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[BY FOLDER NAME](#)
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TRANSFER

[NEW](#)
[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)

DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)

BACK

[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

File Information

[Go back to Box Information Screen](#)

Click the **Save File** button to save the file information after entering each file. Click File # Edit to edit that file.

File			
Transfer List#	Box#	Single File # OR Range of Files #	File Name
<input type="text" value="0707852"/>	<input type="text" value="001"/>	SingleFile# <input type="text" value="4"/> FirstFile# <input type="text"/> LastFile# <input type="text"/>	<input type="text" value="Patron Requests, 2002"/>
			<input type="button" value="Save File"/> <input type="button" value="Reset"/>

Files View

Transfer List#	Box#	File #	File Name	File Edit
0707852	001	3	Patron Requests, 2001	File 3
0707852	001	2	Patron Requests, 2000	File 2
0707852	001	1	Patron Requests, 1999	File 1

Example of Single File # Data Entry

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TRANSFER

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DELIVERY REQUEST

[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
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File Information

[Go back to Box Information Screen](#)

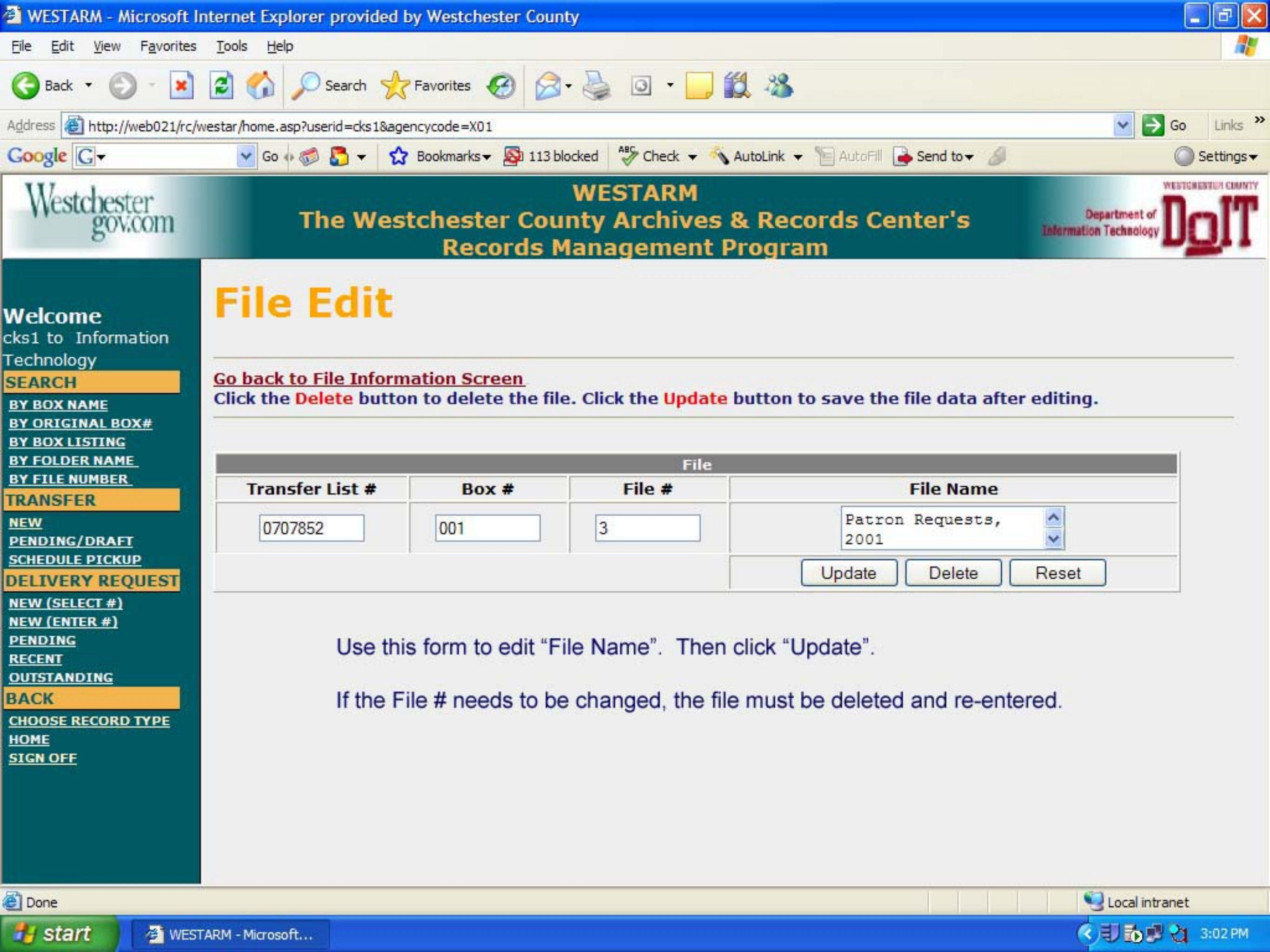
Click the **Save File** button to save the file information after entering each file. Click File # Edit to edit that file.

File			
Transfer List#	Box#	Single File # OR Range of Files #	File Name
0707852	001	SingleFile# <input type="text"/> FirstFile# 8 LastFile# 9	Litigation Files, 2001, <input type="text"/>
			<input type="button" value="Save File"/> <input type="button" value="Reset"/>

Files View

Example of Range of File # Data Entry

Transfer List#	Box#	File #	File Name	File Edit
0707852	001	7	Applicant Files 2000, 7	File 7
0707852	001	6	Applicant Files 2000, 6	File 6
0707852	001	5	Applicant Files 2000, 5	File 5
0707852	001	4	Court Cases 1994-4	File 4
0707852	001	3	Court Cases 1994-3	File 3
0707852	001	2	Court Cases 1994-2	File 2
0707852	001	1	Court Cases 1994-1	File 1



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- BY BOX NAME
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- BY FILE NUMBER

TRANSFER

- NEW
- PENDING/DRAFT
- SCHEDULE PICKUP

DELIVERY REQUEST

- NEW (SELECT #)
- NEW (ENTER #)
- PENDING
- RECENT
- OUTSTANDING

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- CHOOSE RECORD TYPE
- HOME
- SIGN OFF

File Edit

[Go back to File Information Screen](#)

Click the **Delete** button to delete the file. Click the **Update** button to save the file data after editing.

File			
Transfer List #	Box #	File #	File Name
<input type="text" value="0707852"/>	<input type="text" value="001"/>	<input type="text" value="3"/>	<input type="text" value="Patron Requests, 2001"/>
			<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Reset"/>

Use this form to edit "File Name". Then click "Update".

If the File # needs to be changed, the file must be deleted and re-entered.

WESTARM USER'S MANUAL

PRINTING DRAFT TRANSFER LISTS

Although the data entered into a transfer list can be viewed on the screen to be proofread and then edited, for some people it is often easier to print out the transfer list for proofreading purposes before submitting the transfer list to the Records Center. Printing out the transfer list also will list all of the folder information entered for each box. Finally, printing out each draft transfer list will allow you to keep a record of the information that has been submitted to the Records Center. [Note: Once a Transfer List has been approved by the Records Center, and the final Records Center box numbers assigned, you will receive a final copy of it for your records.]

To print a draft of any transfer list, select the “Print Draft Transfer” option on the Box Information Screen. The Transfer List itself will appear in a separate window, using a program called “Crystal Reports”.

The first time you use the “Print Draft Transfer” option on your computer, you may encounter a dialog box asking if you want to install the Active X control for viewing Crystal Reports documents on your computer. This is something automatically triggered on County computers when you try to open a Crystal Reports document when you don't have the Crystal Reports program installed on your computer. Simply click “Yes” and the appropriate software will be installed on your computer. If you have any problems with this step, **contact the Help Desk at 5-5513.**

To print the Transfer List, use the “Print” button on the Crystal Reports viewer, rather than the Internet Explorer print button (see the second page of screen shots in this section).

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TRANSFER

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[DELIVERY REQUEST](#)
[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)
[BACK](#)
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[HOME](#)
[SIGN OFF](#)

Box Information

Select this option to print a draft of your transfer list

Click the **Save Box** button after entering each box. You may enter up to 60 boxes per transfer. Click Box # to edit that box. Click Box # Files Entry to enter files for that box. Go below to Boxes View to preview your transfer list. You may print a draft transfer from Crystal Reports. When all the boxes are entered, Click the **e-mail** button. Click here to **Print Draft Transfer**

Box					
Transfer List #	Box #	Box Description	From Date (MM/DD/YYYY)	To Date (MM/DD/YYYY)	*Select Retention Code
0707853					
			Save Box	Email	

* Click on the following **Retention Schedules** to review them and to find the correct codes for the records you are transferring. You will need to close out this link to return to WESTARM's transfer form. If you have any questions, contact the Records Center at 231-1520.

Click on **CO-2**, revised in 2002, to obtain retention information concerning records from all Westchester County Departments.

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Click on **BOE**, 1996 to obtain retention information concerning Board of Elections records.

Click on **Surrogate**, to obtain retention information concerning Surrogate Court records.

Click on **Civil** or **Criminal** to obtain retention information concerning County Court records.

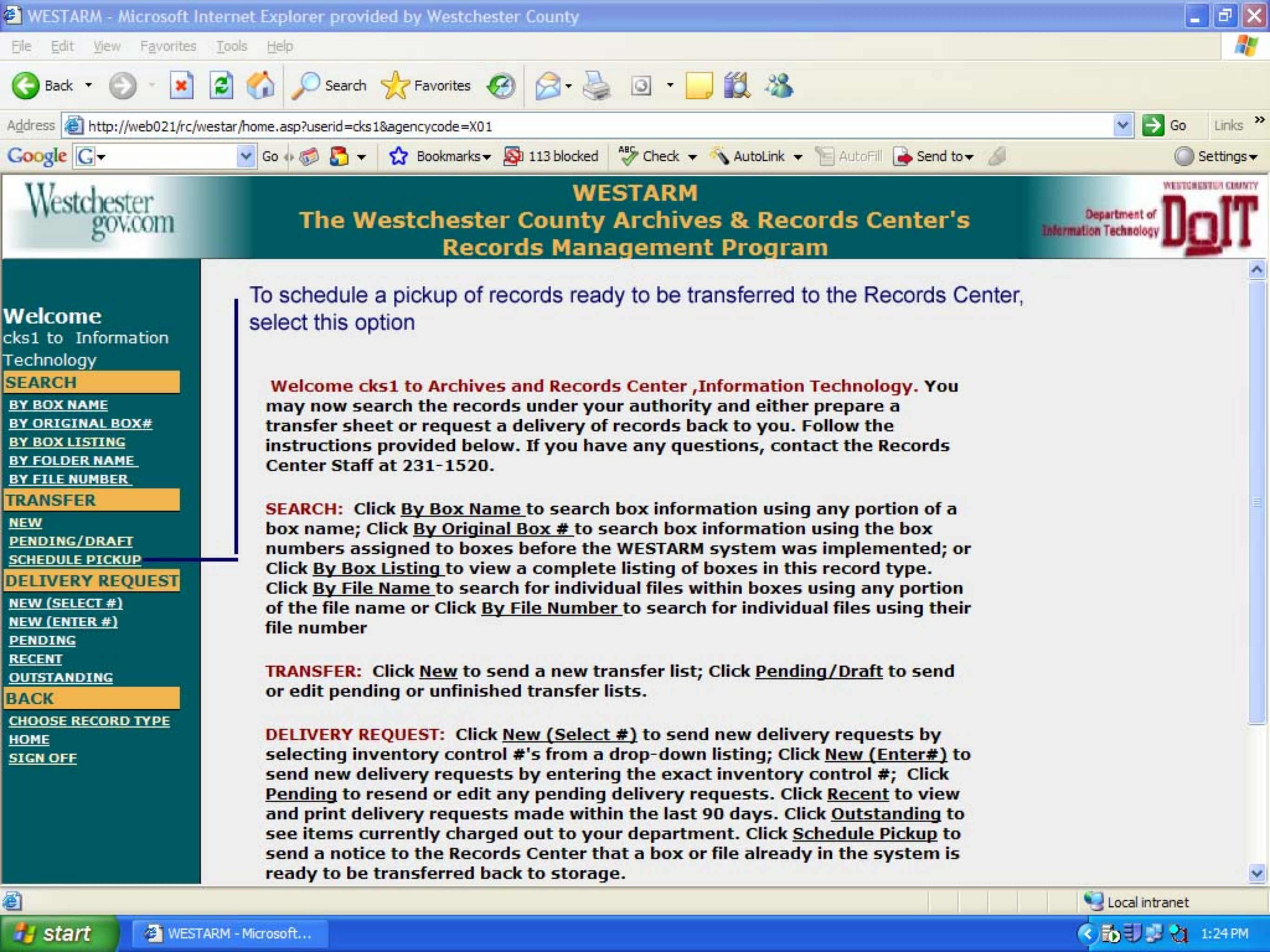


WESTARM USER'S MANUAL

SCHEDULING A PICKUP OF RECORDS TO BE TRANSFERRED TO THE RECORDS CENTER

Once you have received confirmation that your transfer sheet(s) have been approved, and have received the labels for the record boxes – and all the labels have been put on the boxes and the boxes are ready to be picked up – use the “Schedule Pickup” link under the “Transfer” option on the left hand side of the main screen to schedule the pick-up of your boxes.

The e-mail that is created when you select the “Schedule Pickup” option will include the number of boxes in your transfer list. Please also include your address and telephone number. All of this information will assist the Records Center staff in scheduling pick-ups in the most efficient manner possible.



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- BY BOX NAME
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- BY FILE NUMBER

TRANSFER

- NEW
- PENDING/DRAFT
- SCHEDULE PICKUP

DELIVERY REQUEST

- NEW (SELECT #)
- NEW (ENTER #)
- PENDING
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- CHOOSE RECORD TYPE
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To schedule a pickup of records ready to be transferred to the Records Center, select this option

Welcome cks1 to Archives and Records Center ,Information Technology. You may now search the records under your authority and either prepare a transfer sheet or request a delivery of records back to you. Follow the instructions provided below. If you have any questions, contact the Records Center Staff at 231-1520.

SEARCH: Click By Box Name to search box information using any portion of a box name; Click By Original Box # to search box information using the box numbers assigned to boxes before the WESTARM system was implemented; or Click By Box Listing to view a complete listing of boxes in this record type. Click By File Name to search for individual files within boxes using any portion of the file name or Click By File Number to search for individual files using their file number

TRANSFER: Click New to send a new transfer list; Click Pending/Draft to send or edit pending or unfinished transfer lists.

DELIVERY REQUEST: Click New (Select #) to send new delivery requests by selecting inventory control #'s from a drop-down listing; Click New (Enter#) to send new delivery requests by entering the exact inventory control #; Click Pending to resend or edit any pending delivery requests. Click Recent to view and print delivery requests made within the last 90 days. Click Outstanding to see items currently charged out to your department. Click Schedule Pickup to send a notice to the Records Center that a box or file already in the system is ready to be transferred back to storage.

Welcomeitrc to Law
Department**SEARCH**[BY BOX NAME](#)
[BY ORIGINAL BOX#](#)
[BY BOX LISTING](#)
[BY FOLDER NAME](#)
[BY FILE NUMBER](#)
[BY RETENTION CODE](#)**TRANSFER**[NEW](#)
[PENDING/DRAFT](#)
[SCHEDULE PICKUP](#)**DELIVERY REQUEST**[NEW \(SELECT #\)](#)
[NEW \(ENTER #\)](#)
[PENDING](#)
[RECENT](#)
[OUTSTANDING](#)**BACK**[CHOOSE RECORD TYPE](#)
[HOME](#)
[SIGN OFF](#)

Notice Regarding Pickup of Boxes

Click **Send** button to send a notice to the Records Center that boxes for which Transfer Lists have been prepared and approved are ready to be transferred to the Records Center. Please indicate the number of boxes to be picked up and the transfer list number(s) for the boxes.

From: itrc@westchestergov.com
To: cmh1@westchestergov.com
Cc: cks1@westchestergov.com
Cc:
Subject: Law Department L07 Records Ready to be Picked Up

Transferlist# (Approved) 0800276 - Total boxes 60
Transferlist# (Approved) 0800335 - Total boxes 60

Use this field to include your name and telephone number and EXACT address where the boxes are located to make it easier for the Records Center staff to schedule the pick-up of your boxes.