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# *NARA ERM Guidance on the Web*

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## **Nationwide Records Management Training**

Describes NARA records management training available nationwide.

[http://www.archives.gov/records\\_management/training/training.html](http://www.archives.gov/records_management/training/training.html)

## **Vital Records and Records Disaster Mitigation and Recovery**

Addresses the identification and protection of records needed to conduct business under emergency operating conditions or to protect legal and financial rights.

[http://www.archives.gov/records\\_management/publications/vital\\_records.html](http://www.archives.gov/records_management/publications/vital_records.html)

## **ERM E-Gov Initiative**

### **Guidance for Coordinating the Evaluation of Capital Planning and Investment Control (CPIC) Proposals for ERM Applications**

Provides a set of decision points to help determine if office-specific ERM systems should be funded independently or integrated with an agency's enterprise-wide ERM system.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/cpic\\_guidance.html](http://www.archives.gov/records_management/policy_and_guidance/cpic_guidance.html)

### **Electronic Records Management Guidance on Methodology for Determining Agency-unique Requirements**

Provides a step-by-step approach to identifying and defining agency specific system requirements as building blocks for agency ERM systems.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/requirements\\_guidance.html](http://www.archives.gov/records_management/policy_and_guidance/requirements_guidance.html)

### **Electronic Information Management Standards - DoD 5015.2**

Endorses the Federal-wide adoption of the DoD 5015.2-STD

[http://www.archives.gov/records\\_management/initiatives/standards.html](http://www.archives.gov/records_management/initiatives/standards.html)

### **Expanding Acceptable Transfer Requirements: Transfer Instructions for Existing E-mail Messages with Attachments**

Specifies requirements for transferring existing permanent e-mail messages and their attachments to NARA.

[http://www.archives.gov/records\\_management/initiatives/email\\_attachments.html](http://www.archives.gov/records_management/initiatives/email_attachments.html)

### **Expanding Acceptable Transfer Requirements: Transfer Instructions for Existing Permanent Electronic Records Scanned Images of Textual Records**

Specifies requirements for transferring existing permanent scanned images to NARA.

[http://www.archives.gov/records\\_management/initiatives/scanned\\_textual.html](http://www.archives.gov/records_management/initiatives/scanned_textual.html)

### **Expanding Acceptable Transfer Requirements: Transfer Instructions for Permanent Electronic Records DIGITAL PHOTOGRAPHIC RECORDS**

Specifies requirements for transferring permanent digital photographic records to NARA.

[http://www.archives.gov/records\\_management/initiatives/digital\\_photo\\_records.html](http://www.archives.gov/records_management/initiatives/digital_photo_records.html)

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### **Expanding Acceptable Transfer Requirements: Transfer Instructions for Permanent Electronic Records RECORDS IN PORTABLE DOCUMENT FORMAT (PDF)**

Specifies requirements for transferring permanent PDF records to NARA.

[http://www.archives.gov/records\\_management/initiatives/pdf\\_records.html](http://www.archives.gov/records_management/initiatives/pdf_records.html)

### **Expanding Acceptable Transfer Requirements: Transfer Instructions for Permanent Electronic Records DIGITAL GEOSPATIAL DATA RECORDS**

Specifies requirements for transferring permanent digital geospatial data records to NARA.

[http://www.archives.gov/records\\_management/initiatives/digital\\_geospatial\\_data\\_records.html](http://www.archives.gov/records_management/initiatives/digital_geospatial_data_records.html)

### **Expanding Acceptable Transfer Requirements: Transfer Instructions for Permanent Electronic Records WEB CONTENT RECORDS**

Specifies requirements for transferring permanent web content records to NARA.

[http://www.archives.gov/records\\_management/initiatives/web\\_content\\_records.html](http://www.archives.gov/records_management/initiatives/web_content_records.html)

## **Fast-track Guidance Products**

### **Context for Electronic Records Management (ERM)**

Specifies the records management and information technology [IT] terminology associated with Electronic Recordkeeping (ERK).

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/context\\_for\\_electronic\\_records\\_management.html](http://www.archives.gov/records_management/policy_and_guidance/context_for_electronic_records_management.html)

### **What is Electronic Recordkeeping (ERK)**

Presents high level discussions of what electronic recordkeeping [ERK] is in terms of architectures, objectives, and critical success factors.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod1b.html](http://www.archives.gov/records_management/policy_and_guidance/prod1b.html)

### **Why Federal Agencies Need to Move Toward Electronic Recordkeeping**

Summarizes the statutory, legal, regulatory requirements plus internal reasons to move towards electronic recordkeeping (ERK).

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod2fnl.html](http://www.archives.gov/records_management/policy_and_guidance/prod2fnl.html)

### **Preliminary Planning for Electronic Recordkeeping: Checklist for IT Staff**

Lists questions for IT staff to address before implementing an electronic recordkeeping system, and provides related guidance.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod3rev.html](http://www.archives.gov/records_management/policy_and_guidance/prod3rev.html)

### **Preliminary Planning for Electronic Recordkeeping: Checklist for RM Staff**

Identifies high-level issues that Records Officers need to consider before initiating any discussion about moving towards electronic recordkeeping.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod4rev.html](http://www.archives.gov/records_management/policy_and_guidance/prod4rev.html)

### **Typical Records Management [RM] Functions and Typical RM Program Activities**

Provides an overview of basic concepts about typical records management functions and overall records management program functions.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod6a.html](http://www.archives.gov/records_management/policy_and_guidance/prod6a.html)

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## **Examples of System Functions for Electronic Recordkeeping (ERK) and Electronic Records Management (ERM)**

Gives examples of detailed system functions that an ERKS or ERM system might need to perform in order to satisfy basic records management functions.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod6b.html](http://www.archives.gov/records_management/policy_and_guidance/prod6b.html)

### **Survey of Baseline Organizational Information**

Provides a survey questionnaire for gathering baseline organizational information for developing records management system requirements or evaluating ERM and ERK solutions.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod7.html](http://www.archives.gov/records_management/policy_and_guidance/prod7.html)

### **Analysis of Costs and Benefits for ERM/ERK Projects**

Provides a guide to identify some typical cost categories and possible benefits of an existing RM system, or of the alternative ERM/ERK solutions.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod8.html](http://www.archives.gov/records_management/policy_and_guidance/prod8.html)

### **User Guide to Slide Presentation: Electronic Recordkeeping**

A user's guide for Fast Track PowerPoint Briefings

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/guide.html](http://www.archives.gov/records_management/policy_and_guidance/guide.html)

### **Long version of customizable Electronic Recordkeeping PowerPoint Presentation**

Provides the longer version of a presentation that can be used in raising awareness about electronic recordkeeping as part of planning for such systems.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod5a.html](http://www.archives.gov/records_management/policy_and_guidance/prod5a.html)

### **Short version of customizable Electronic Recordkeeping PowerPoint Presentation**

Provides a presentation that can be used in raising awareness about electronic recordkeeping as part of planning for such systems.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/prod5b.html](http://www.archives.gov/records_management/policy_and_guidance/prod5b.html)

## **Managing Web Records**

### **NARA Guidance on Managing Web Records**

Assists agency staff in properly managing web records.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/managing\\_web\\_records\\_index.html](http://www.archives.gov/records_management/policy_and_guidance/managing_web_records_index.html)

## **NARA Guidance on Electronic Signatures**

### **Records Management Guidance For PKI-Unique Administrative Records**

Provides detailed guidance on retaining and managing PKI-unique administrative records.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/pki\\_guidance.html](http://www.archives.gov/records_management/policy_and_guidance/pki_guidance.html)

### **Records Management Guidance for Agencies Implementing Electronic Signature Technologies**

Discusses the records management principles that apply to electronic signature technology generally.

[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/electronic\\_signature\\_technology.html](http://www.archives.gov/records_management/policy_and_guidance/electronic_signature_technology.html)

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**Records Management Guidance for PKI Digital Signature Authenticated and Secured Transaction Records**

Provides records management guidance to Federal agencies for PKI digital signature authenticated and secured electronic transaction records.

*[http://www.archives.gov/records\\_management/policy\\_and\\_guidance/pki.html](http://www.archives.gov/records_management/policy_and_guidance/pki.html)*