

# ERA Pilot Phase 2

BRIDG Meeting  
June 10, 2009

# Background

---

- Overall Goal: That in 2011, all agencies will use ERA to perform all records scheduling, accessioning, and transferring of electronic records tasks -- not SF 115s and 258s
- Benefits to agencies
  - Being able to file on line
  - On-line forms will be easier to complete
  - Can view progress of transactions
- Steps to date:
  - June 2008 IOC achieved - ERA Pilot Phase 1 began
  - Aug.-Sept 2008 about 120 NARA and agency people were trained
  - 4 pilot agencies have been involved (PTO, NAVO, NNSA, and BLS)

# Problems with Pilot Phase 1

---

- Procedural issues
  - It took until spring 2009 for all pilot agency people to get ERA accounts
  - Until spring 2009 none of the agency people could logon to ERA because of IP address problems
- Technical issues
  - ERA base system has had glitches
- Result: low levels of agency-initiated activity in ERA to date
- Need to get agency feedback on ERA to ensure that ERA is usable for the entire govt.

# Proposed Solution

---

- Technical fixes
  - Fix the highest priority technical problems
  - Should be completed by Sept. 2009
- Initiate Pilot Phase 2
  - Goal: NARA conduct a pilot with a larger community of its agency customers actively using ERA
  - Include agencies that will be transferring to NARA a wide range of record types (electronic and non-electronic) during the pilot period
  - Include agencies that will be submitting records schedules during the pilot period
  - Limited to agencies whose records fall under the Federal Records Act (not donated materials, Supreme Court, or Congressional records)
  - That on the NARA side we include all custodial units
- Pilot period Oct. 1, 2009 – March 30, 2010

# The Pilot Phase 2 Concept

---

- NARA to approach candidate agencies and ask them to participate in testing ERA
- What is being tested?
  - One or two areas of ERA functionality – examples – just accessions via direct offer or just completing records schedules
  - NARA's new web based training
  - NARA's new user accounts procedure

# What's Involved from the Pilot Agency Perspective?

---

- That agency staff be trained – NARA will develop web based training
- That the pilot agencies use ERA for all transactions for their designated functions
- That pilot agencies provide feedback of how well ERA is working through
  - Feedback forms
  - Conference calls
  - Focus groups

# Next Steps for Phase 2 Pilot

---

- NARA will contact selected agencies to consider participation
- NARA to provide a briefing on ERA and on the expectations for the pilot
- NARA to provide agencies with URL for training materials in Sept.
- Pilot agencies to get their people trained
- Agencies will use ERA in the Oct. 2009-March 2010 timeframe
- NARA will collect feedback from pilot participants
- NARA will enhance ERA based on feedback

# Follow on Steps after Pilot Phase 2

---

- Pilot Phase 3 – Includes Congress, Supreme Court, Donated, and digital surrogates – after March 2010
- Voluntary Agency Phase – Invite any agency to participate - June 2010
- Mandatory Agency Phase – Require all agencies to participate - in 2011



# Questions???

---