The Electronic Records Archives (ERA)

BRIDG Meeting

August 17, 2006

ERA Program Update

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Agenda

- Review
- Agency Orientation
- Agency Involvement in Human Factors
- Next Steps

Review

Why does NARA need Agency Involvement in ERA development?

- To provide user acceptance of ERA system
- To standardize schedule creation and submission across agencies.
- To identify potential problems early on
- To minimize of risks
- To promote information sharing across agencies

Collaboration is critical to ERA's success.

Review

- Selection Process Developed for Increment 1 Agencies

- Increment 1 Test Agencies Selected:
  - Bureau of Labor Statistics
  - U.S. Patent & Trademark Office
  - U.S. Naval Oceanographic Office
  - National Nuclear Security Administration- Kansas City Plant

Agency Orientation

- Occurred June 1, 2006 at Archives I in Washington, DC
- Three of four of the agencies participated (NNSA had separate presentation via conference call)
- Provided ERA overview, overview of new e-115, and discussed their level of involvement in the program

Agency Involvement in Human Factors

- Review of ERA user interface and its ease of use given NARA process
- Focus group held on June 1, 2006
- Reviewed screens associated with creation and submission of a records schedule
- Comments were on the screens ONLY – not the process itself
- Schedule creation examples on following slides

Agency Involvement in Human Factors – Scheduling

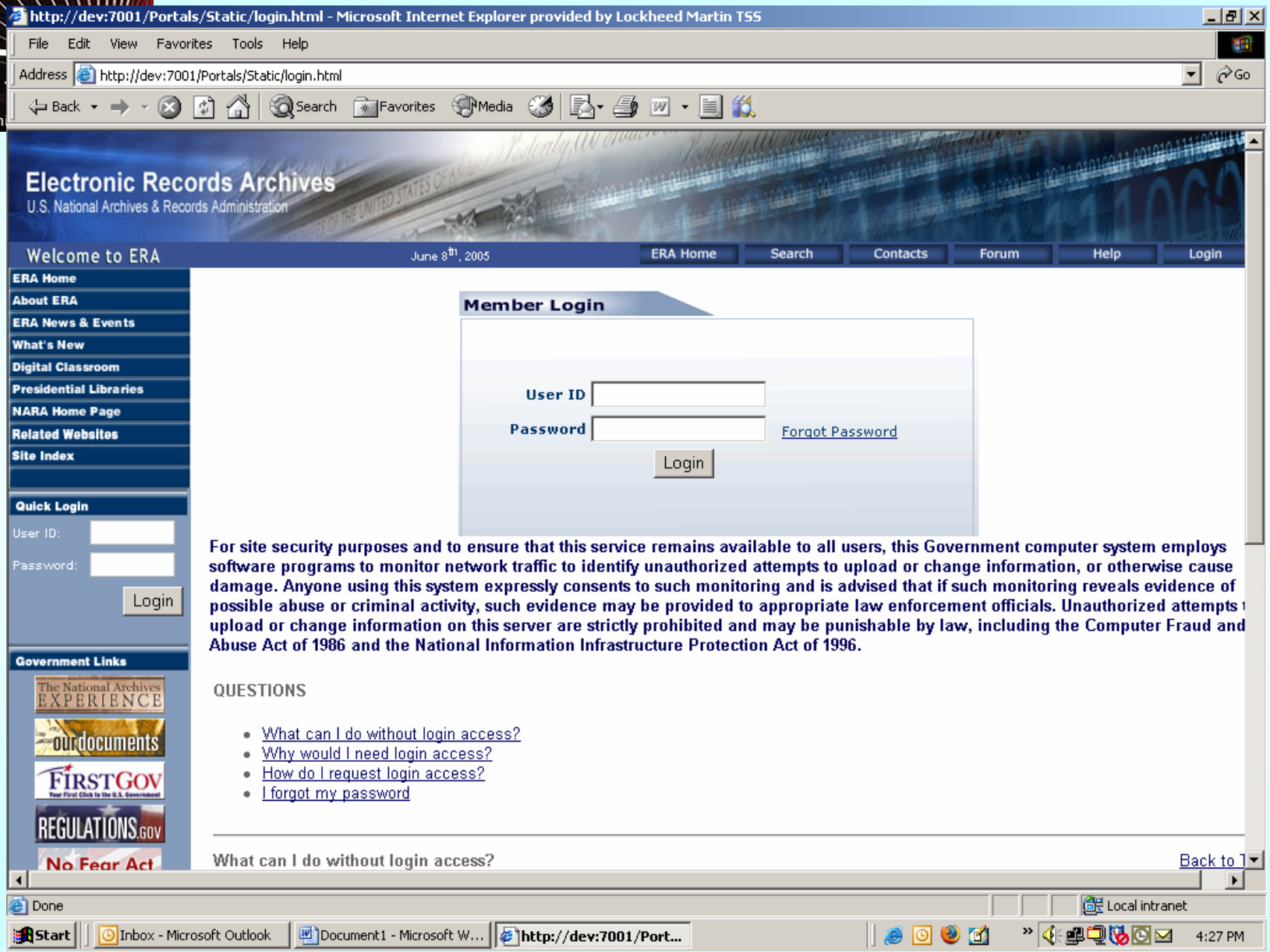
- All aspects of scheduling and appraisal for the 4 agencies to be done using ERA tool (with release 3)
  - Creation and submission of schedules
  - NARA processing, including appraisal report
  - Final approval

Agency Involvement in Human Factors - Scheduling

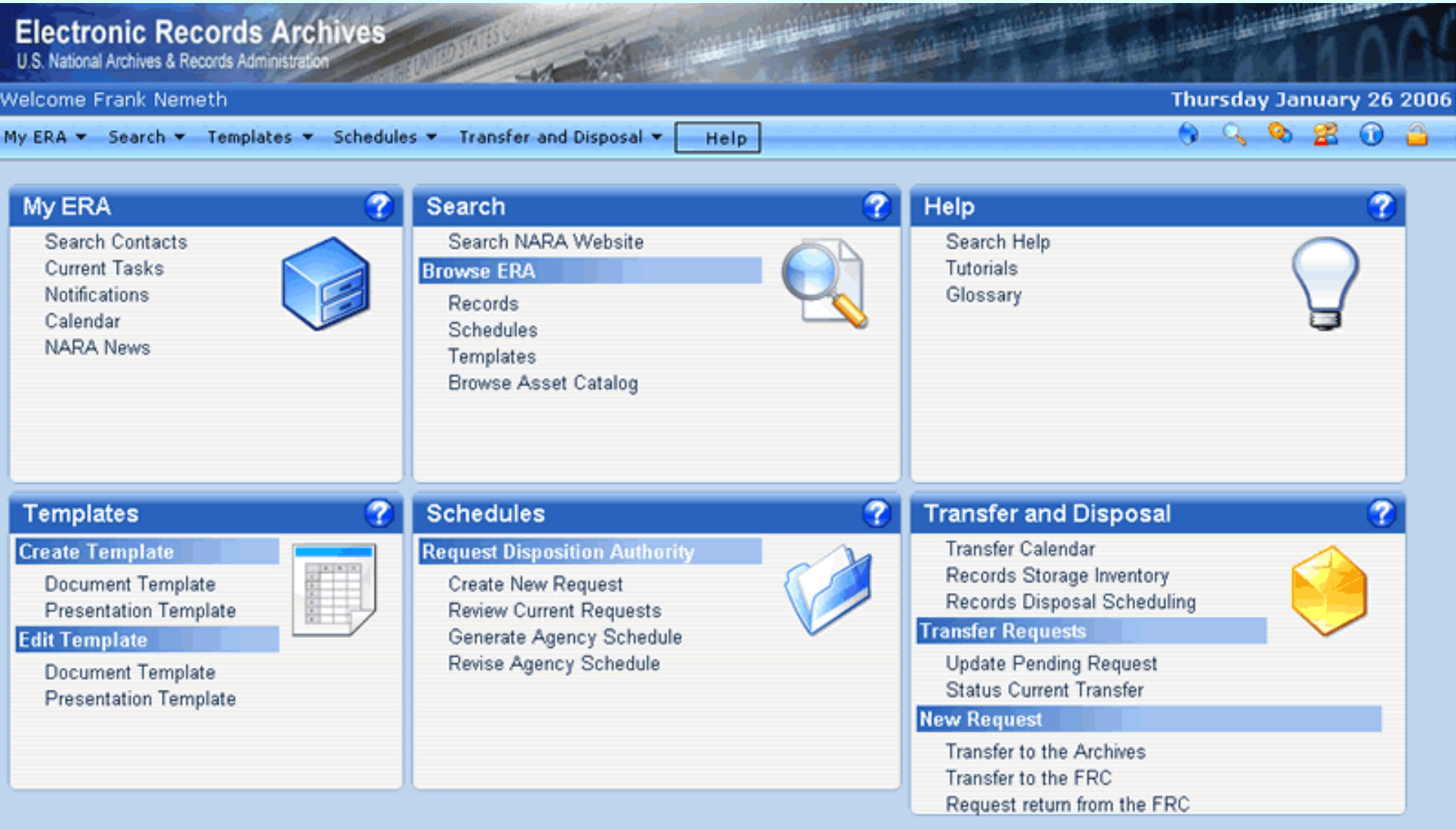
- **New E-115**
  - Fielded data
  - Mandatory fields/dependencies
  - Structured disposition instructions

Agency Involvement in Human Factors – Welcome Screen

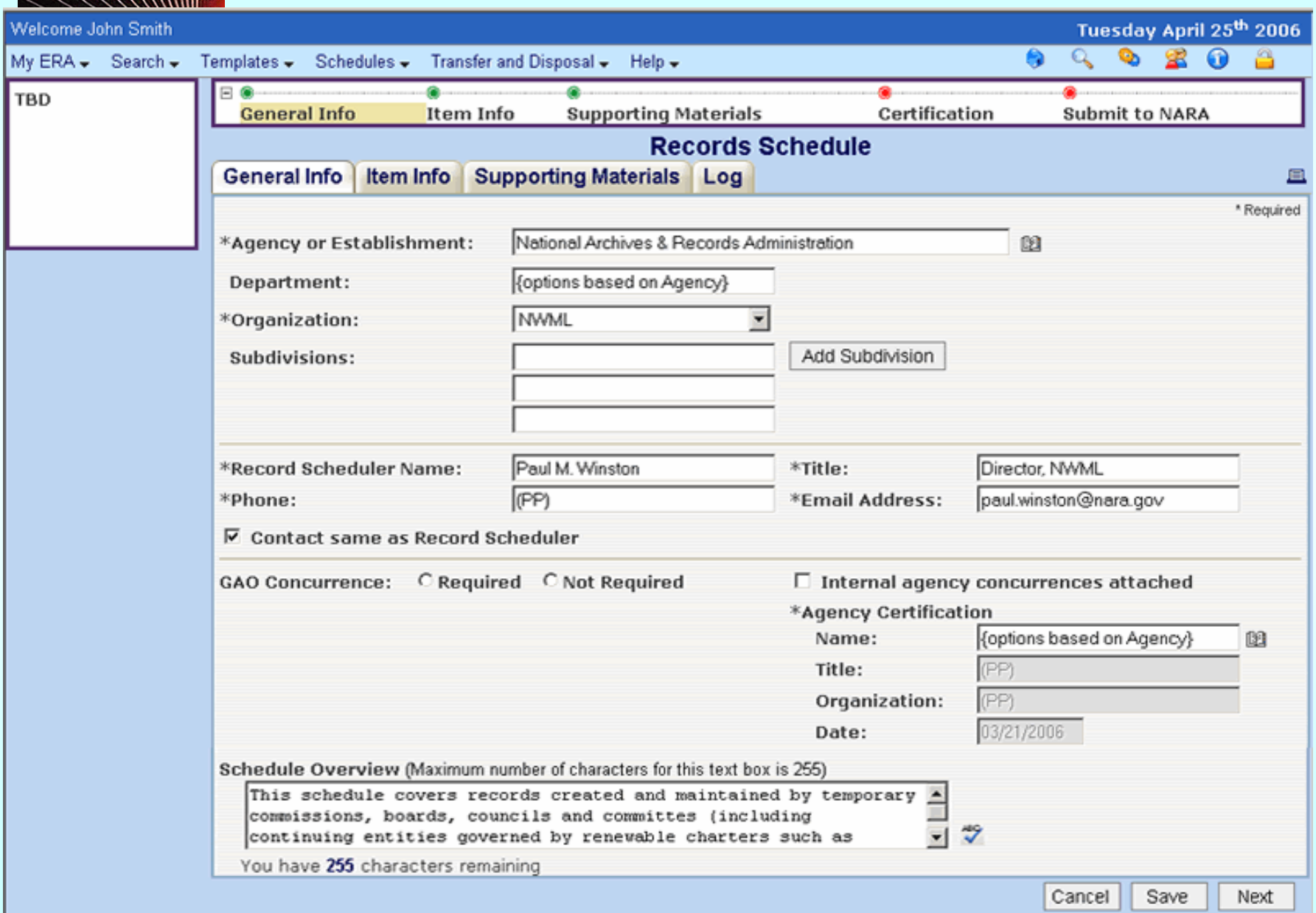
Agency Involvement in Human Factors – User Log-in



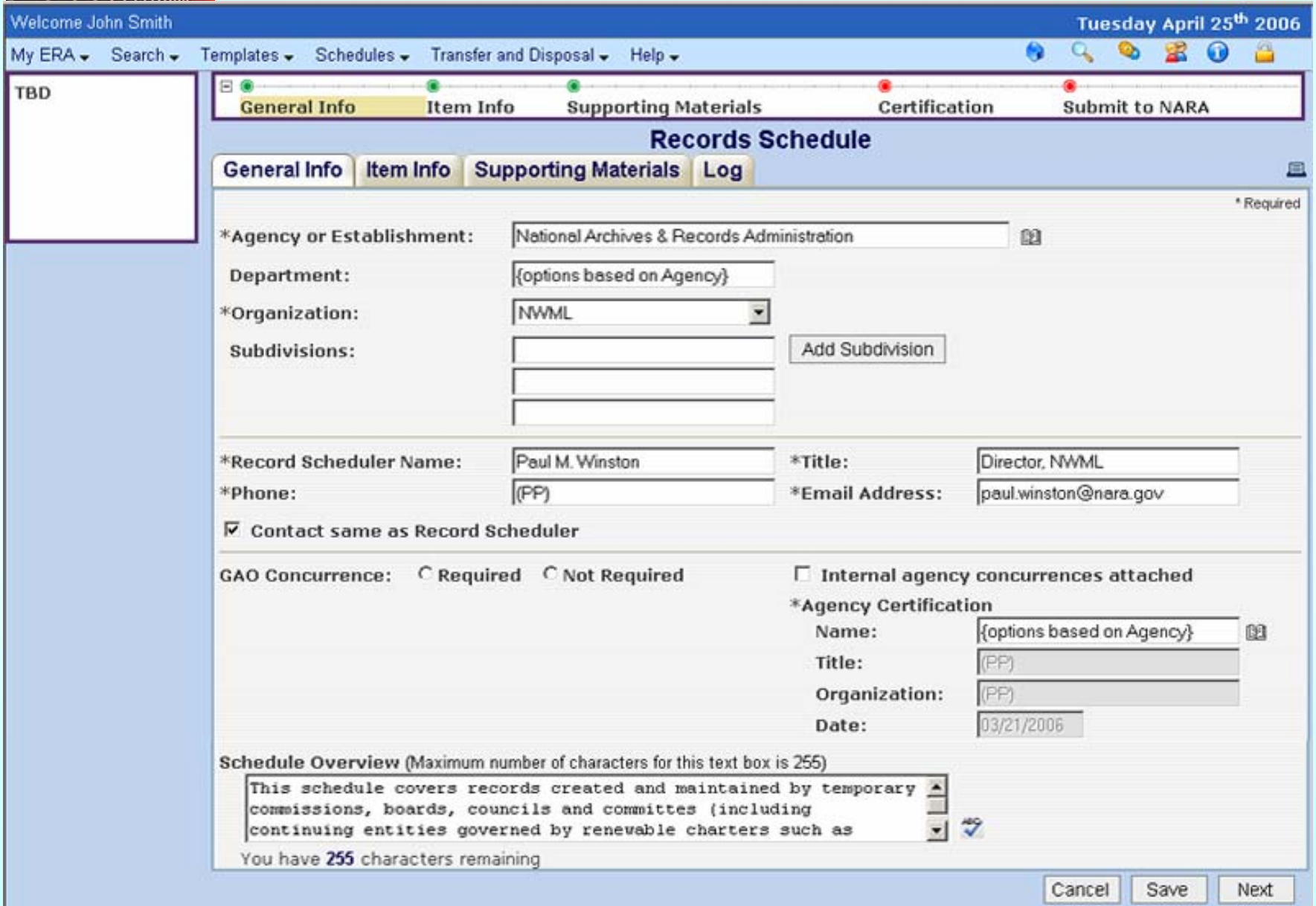
Agency Involvement in Human Factors - Workbench



Agency Involvement in Human Factors – Records Schedule Gen Info



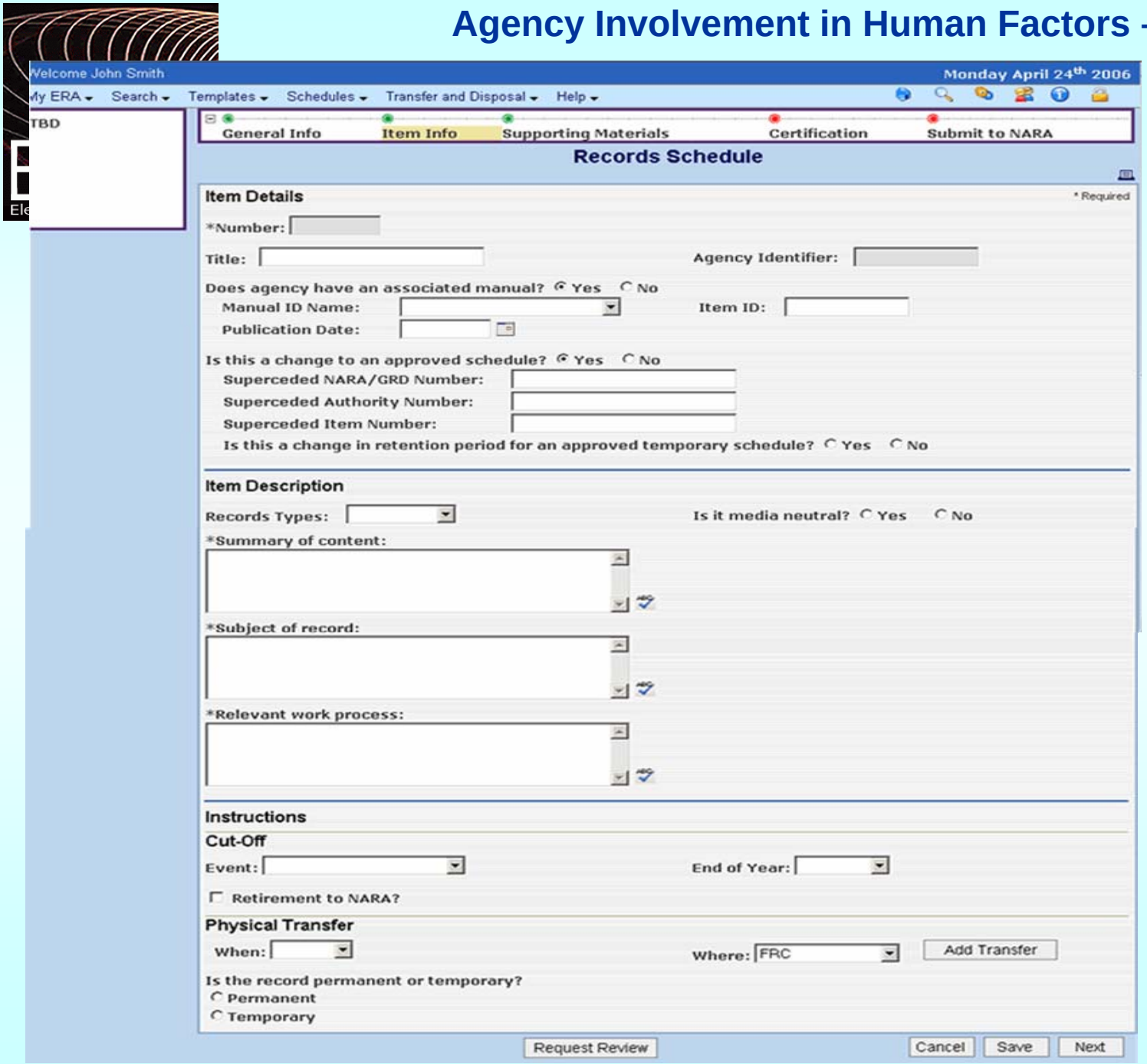
Agency Involvement in Human Factors – Records Schedule Gen Info (cont'd)



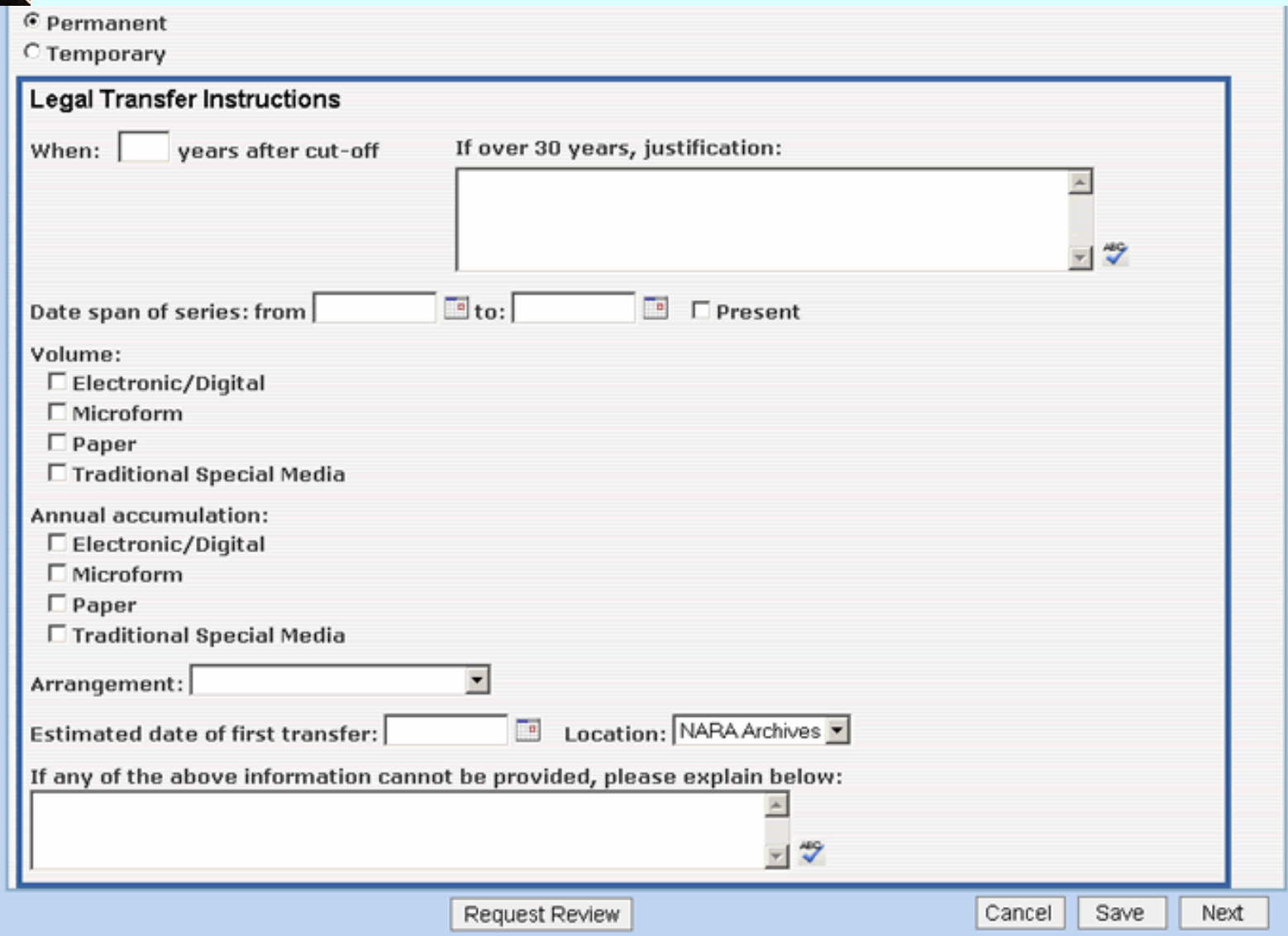
Agency Involvement in Human Factors – Disposition Instructions

- Clear statement of Permanent or Temporary
- Clearly identified physical transfer instructions (optional)
- Disposal date linked to cutoff of records
- Legal transfer of permanent also linked to cutoff

Agency Involvement in Human Factors – Disposition Instructions



Agency Involvement in Human Factors – Disposition Instructions



Review

- Agency and NARA scheduling activities will be carried out using ERA
  - Schedules routed internally using ERA
  - New format for appraisal reports
  - Communications carried out through ERA

- Easier, quicker process (we hope)

Next Steps

- What are the next steps?
  - Follow up on questionnaire submittal
  - Follow up with records officers of the 4 agencies on strategies to promote ERA buy-in with Agency leadership
  - Human factors early user involvement (EUI) activities

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