

# Bimonthly Records and Information Discussion Group (BRIDG)

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THE  
NATIONAL  
ARCHIVES  
AND RECORDS  
ADMINISTRATION

RECORDS  
MANAGEMENT  
TRAINING  
PROGRAM

# Agenda

- ◆ Accelerated Deployment of the Electronic Records Archives (ERA) to Federal Agencies
- ◆ Records Management Self-Assessment
- ◆ RACO 2011 Program and Archivist Achievement Awards

# ERA Adoption Plan – Important Milestones

- ◆ March 2011
  - Begin rolling out ERA to 30 CIO Council Agencies
- ◆ July 2011
  - ERA available for use by all Federal agencies
  - The preferred way for scheduling and transferring records to NARA
- ◆ End of FY 2012
  - ERA is required in order to schedule and transfer records to NARA
  - NARA will be contacting agencies to schedule preparation and training activities prior to agency adoption

# ERA Adoption Plan – Important Milestones

- ◆ Phase 1 - Timetable for 30 CIO Council agencies:
  - March 2011: *State, HHS, Justice*
  - April 2011: *EPA, SBA, **Transportation***
  - May 2011: *Army, Commerce, NRC*
  - June 2011: *Treasury, Interior, HUD*
  - July 2011: *EOP, Energy, Labor*

# ERA Adoption Plan – Important Milestones

- ◆ Phase 1 Timetable:
  - August 2011: VA, USAID, NSF
  - September 2011: DoD, OPM
  - October 2011: DHS, GSA
  - November 2011: ODNI, **Air Force**, **Agriculture**
  - Anytime 2011: NASA, Education, Navy, SSA
- ◆ Rest of Government stagger-scheduled through September 2012

# ERA Adoption Plan – Important Milestones

- ◆ Rest of Government stagger-scheduled through September 2012
  - Email informing records officers of rollout to rest of government sent week of January 31, 2011
  - Special sign up instructions sent by February 4, 2011 to rest of government. Due date February 18.
  - 74 agencies have signed up so far.

# Sequence of Steps to Deployment

- ♦ Identify roles
  - ERA Account Manager
  - Functional roles: scheduler, transferor
    - On-line sign-up **available by mid-February**
- ♦ Get training
  - Online training, user guides, personal assistance
    - Revised training will be rolled out starting in February
      - <http://www.archives.gov/era/training/>
    - Help Desk
- ♦ Get connected
  - Firefox v3.6 or Internet Explorer v7 recommended
  - Optional Packaging Tool

# Steps to Deployment

- File transfer sizes
  - HTTPS Upload: 1 gb package size maximum
  - SFTP Upload: unlimited but consider bandwidth
  - Physical media: suggested for larger shipments
- Prepare work
  - Schedules
  - Transfers
- Start using ERA
  - Available help



# Development in FY 2011

- ◆ Left to be developed by the end of FY2011:
  - Streamline the accessioning workflow:
    - Sign the transfer request and legal transfer instrument at the same time;
    - approve multiple Transfer Requests simultaneously;
  - Pre-accessioning functionality;
  - Establish email notification capabilities;
  - Allow the attachments of documents
  - Expand the size of electronic shipments ;

# Development in FY 2011

- ◆ Left to be developed by the end of FY2011:
  - Pre-populate ERA business objects with ARCIS data for the annual move.
- ◆ Transformation of records from one format to another. In FY2012, EBCDIC format to the more standard ASCII format.
- ◆ Transfer and store classified electronic records will be available in August 2011.

# Development in FY 2011

- ◆ Finally, on-line public access to holdings is being prototyped at <http://www.archives.gov/research/search/>
  - Our on-line public access will feature streamlined searching across all of our data stores, enhanced display, and the use of social media tools, e.g., wikis and social tagging.

## Records Management Self-Assessment (RMSA)

- ◆ Report currently at OMB
- ◆ FY 2010 RMSA sent out in May 2010
- ◆ Special focus was on agencies' internal records management training programs
- ◆ Distributed to 270 agencies
- ◆ 93 percent (251) response rate
- ◆ 95 percent of agencies in moderate or high risk categories

## Records Management Self-Assessment (RMSA)

- ◆ Will be distributed on May 2, 2011
- ◆ Agencies will have 4 weeks to complete
- ◆ Dual focus:
  - The transfer of permanent records to NARA
  - Agencies' records management internal controls
- ◆ More questions will be validated
  - Will require submission of documentation
  - Possible follow-up meetings or interviews

## RACO 2011 Program

- ◆ Scheduled for May in Washington, D.C., final details in process
- ◆ Theme is “Forging Ahead: Meeting the Challenges of Electronic Records in an Open Government”
  - Sessions include content on:
    - Social media and records management
    - Balancing access to information with security
    - Quick wins for your RM program
- ◆ How you can help!

## **RACO 2011 Archivist Achievement Awards**

- ◆ Anxiously waiting on your submissions!
- ◆ Due date is February 25
- ◆ Change in format for the 2011 Conference

## Discussion and Questions

- ◆ Next BRIDG Meeting
  - April 20
  
- ◆ Possible Topics
  - Update on NARA Transformation and Agency Services
  - 2011 RM Self-assessment
  - Agency Best Practice presentation?