Welcome and Speaker Introductions

Laurence Brewer

Chief Records Officer for the US Government

February 16, 2021

- **Welcome and Speaker Introductions** – Laurence Brewer, Chief Records Officer for the U.S. Government

- **FRCP Updates** – Gordon Everett, Director of Customer Relationship Management, Federal Records Centers Program

- **Update on ERA 2.0** – Sam McClure, Electronic Records Program Director & David Lake, Program Manager, ERA

- **Records Management Training Updates** – Eddie Kline, Director, Records Management Training Program

FRCP Updates

Gordon Everett

Director, Customer Relationship Management,
Federal Records Centers Program

February 16, 2021

Questions for Gordon?

To Ask Questions

Chat via YouTube

or

Email:
RM.Communications@nara.
gov

Update on ERA 2.0

David Lake, Program Manager   - ERA

&

Sam McClure, Electronic Records Program Director

February 16, 2021

Agency Services
NATIONAL ARCHIVES

Capabilities for Upload / Storage / Preservation of digital files NARA needs to maintain deployed in system October 2018

- Accessions of born - digital and uploads of digitized files
- Used by DC- area NARA staff, some NARA field sites and some Presidential Libraries

Capabilities for basic Records Schedules and Transfer Requests forms and workflows deployed in system November 2020

- No current use of these capabilities until forms migration from ERA Base is completed
- Based in part on a small number of (pre - pandemic) agency stakeholder sessions

Improve Forms and Capabilities for Scheduling & Transfer Processes

- New Records Schedule and Transfer Request forms
- Improved Dashboard of relevant Work Items & Tasks
- Eliminate display of all versions of a form in search results
- Agency users will now be able to access attachments
- A new Bulk Import Tool with additional support for Annual Move TRs

Workflow support for scheduling and transfers

- Better visibility into the status of forms throughout their approval lifecycle
- Ability for Agency users to designate additional reviewers for concurrence on Records Schedules and/or TRs prior to sending those forms to NARA

Redesigned User Access

- Based on user's organization rather than Record Group
- Can add or remove organizations and Record Groups as needed from user profiles
- Better targeting of System notifications - based on organization and user role within organizations

Agency
Services

NATIONAL
ARCHIVES

Phase 1 Data Migration of Electronic Records & Metadata from current ERA to ERA 2.0 almost complete

Continued use of current ERA for Records Schedules and Transfer Requests

Small standing development team

- High - priority fixes and enhancements to new forms and workflows
  - Issues identified during NARA user testing among other priorities
  - Future means of addressing agency user issues
- Other high priority fixes and enhancements

Agency Services

NATIONAL ARCHIVES

Key Dependencies

- Implementation of Access to ERA 2.0 via PIV authentication (scheduled for FY 2021)

- Phase 2 Data Migration of Records Schedules, Transfer Requests, Attachments, and related data from ERA to ERA 2.0

  - Initial effort began in September 2020 but terminated in December 2020

  - Currently developing new approach for migration effort

Agency
Services

NATIONAL
ARCHIVES

Phase 2 Data Migration Approach

- Ensure sufficient development work to complete forms and workflows

- Ensure successful complex data mappings from legacy forms to new forms in ERA 2.0

- Reduce schedule uncertainty

  - Minimize length of planned system outages

  - Ensure sufficient lead time in communicating with agencies

  - Minimize impacts on users with in   - progress forms

  - Minimize impact on Annual Move

- When approach is finalized and new vendor team is in place, NARA will be able to provide updates on timelines for launching ERA 2.0 for agency use

- No plausible way to complete migration in FY 2021

  - Continued use of current ERA into FY 2022

    - Continued reliance on Microsoft IE 11

Questions for Sam and David?

To Ask Questions
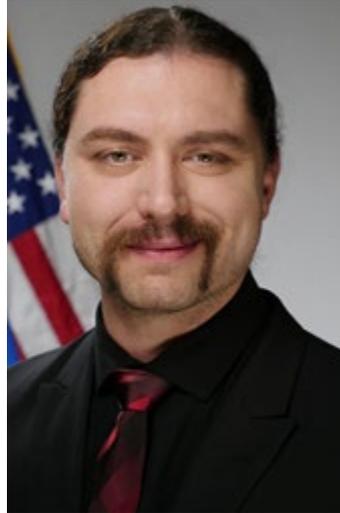
Chat via YouTube

or

Email:
RM.Communications@nara.
gov

Records Management Training Updates

Eddie Kline

Director, Records Management Training Program

February 16, 2021

- Access to all
  - ([archives.gov/records - mgmt/training](archives.gov/records-mgmt/training))

- Online Lessons
  - ([archives.gov/records - mgmt/training/online - lessons](archives.gov/records-mgmt/training/online-lessons))

- Certificate at the end of each module

- Downloadable files to best serve your training needs

Agency Services

NATIONAL ARCHIVES

Code	Title	Description	Source Files (downloadable)	Date Updated
Terminology				
L1.001	What is the Records Lifecycle?	Learn about the phases in the records management lifecycle.	1. LMS/SCORM 2. Storyline Source File 3. Web package	11/10/2020
L1.002	What are Temporary Records?	This module defines the concept of temporary records in the world of U.S. Federal records.	1. LMS/SCORM 2. Storyline Source File 3. Web package	11/10/2020
L1.003	What are Permanent Records?	This module defines the concept of permanent records in the world of U.S. Federal records.	1. LMS/SCORM 2. Storyline Source File 3. Web package	11/10/2020

- [archives.gov/records - mgmt/training/online - lessons](archives.gov/records-mgmt/training/online-lessons)

Training Materials for Senior Agency Officials for Records Management

Federal Records Management

Home > Federal Records Management > Records Management Training Program > Training Materials for Senior Agency Officials for Records Management (SAORM)

Records Management Training Menu

Federal Records Management
Training Materials Catalog
Online Lessons
Training Videos
Agency Records Officer Credential (AROC)

By Role

Senior Agency Officials for Records Management (SAORMs)
Agency Records Officers
Records Liaisons
Records Custodians
Legal Counsel
Political Appointees & Senior Executives
All Employees

By Product Type

Online Learning
Job Aids
Videos and Webinars
Knowledge Area Courses

Training Materials for Senior Agency Officials for Records Management (SAORM)

* The lessons identified below are recommended for Senior Agency Officials.

Online Learning

- Records Management Policy (L1.004)
- Develop Records Management Strategic Goals and Plan (L3.005)
- Develop Capstone approach for the Management of Email (L3.010)
- Create Records Management Policies for Records Stored in the Clouds (L3.015)

Visit the Online Lessons page for a complete list of available lessons.

Videos

- A How-To Guide for Completing NARA's Records Management Self Assessment
- Capstone's Managers' Briefing
- Explanation of Frozen and Legal Holds as they Pertain to Permanent Records
- Guidance on Managing Social Media Records
- Records Management Guidance for Political Appointees

Visit the Training Videos page for a complete list of available videos.

Job Aids and Practice Materials

- Job Aids

Resources

- Documenting Your Public Service
- Senior Agency Officials for Records Management
- Please email your request for assistance to rmt1@nara.gov.

- archives.gov/records   - mgmt/training/senior   - officials - training

Contacts for More Information

Records Management Training Mailbox:

rmtl@nara.gov

Director, Eddie Kline:

christopher.kline@nara.gov

Records Management Training Program Website:

https://www.archives.gov/records-mgmt/training

Questions for Eddie?

To Ask Questions

Chat via YouTube

or

Email:
RM.Communications@nara.
gov

General Q&A

To Ask Questions

Chat via YouTube

or

Email:
RM.Communications@nara.
gov

National Archives — Agency Services

NEXT MEETING

Tuesday
April 20, 2021

RM.Communications@nara.gov

Bi- Monthly Records and Information Discussion Group

https://www.archives.gov/records-mgmt/meetings/index.html

National Archives

Agency Services

Technical Difficulties
Please Stand by

RM.Communications@nara.gov

Bi- Monthly Records and Information Discussion Group

https://www.archives.gov/records-mgmt/meetings/index.html