

# Toolkit for Managing Electronic Records

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# Overview

- Toolkit Basics
- Resources
- How to find resources
- How to suggest candidate resources

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# What is toolkit.archives.gov?

- On-line database
- Portal for sharing and obtaining ERM guidance resources
- ERM guidance, examples, resources
- NARA, Federal, State, private, international, foreign, academia

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# Currently 152 “tools”

- NARA
  - FAQs, Transfer Guidance, RMA Study, FEA RM Profile, NARA Bulletins
- Non-NARA
  - Federal agency examples
  - State, private, international, foreign, academia

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# “How to” Examples

- Practical examples of **how** agencies are addressing recordkeeping requirements
- NARA’s *Framework for Developing Records Management Guidance*
  - Examples of program documents
  - Implementing NARA’s recordkeeping requirements

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# Types of “Tools”

- Studies, web sites, surveys white papers and articles on ERM topics
- NARA and foreign guidance on managing web content
- Standards developed by foreign governments and international bodies
- Guidelines /checklists for embedding recordkeeping in information systems

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# Records Managers



Records Management

## RECORDS MANAGEMENT RESOURCES

- [Records Management FAQs](#)
- [Federal Records Centers \(FRC\)](#)
- [Electronic Records Management \(ERM\)](#)
- [Toolkit for Managing Electronic Records](#)
- [Records Management Handbook](#)



[Print Page](#)



[E-mail Page](#)



[Bookmark](#)

NARA's RM Page  
Left Side

## Records Management Frequently Requested



[News and Events](#)



[What's New!](#)

## **NEW!** Toolkit Welcome Page

The [Toolkit for Managing Electronic Records](#) is a web portal that provides summary descriptions of a collection of guidance products for managing electronic records and resources (“tools”) that have been developed by NARA and other agencies.

This welcome page provides:




- [A direct link to the Toolkit web site](#)
- [Downloadable list of tools](#)
- [Contact information for the Toolkit Team](#)

Go directly to  
Toolkit

Download  
Lists of Tools

### ***Downloadable Lists of Tools***

The following links provide downloadable files of current data from the Toolkit:

- [Spreadsheet listing of all current tools in the Toolkit](#)   
You can use the spreadsheet to sort and manipulate the lists of tools that are currently in the Toolkit.
- [List of all NARA tools in the Toolkit](#)   
This list includes all **NARA** tools currently in the Toolkit *sorted by date*.
- [List of all NARA and non-NARA tools in the Toolkit sorted alphabetically by organization](#)   
This list includes all **NARA and non-NARA** tools currently in the Toolkit *sorted alphabetically by organization*.



## TOOLKIT MENU

- [About the Tool kit](#)
- [Contact Us](#)
- [Frequently Asked Questions](#)
- [Suggest a Tool](#)



Use the Toolkit for Managing Electronic Records to explore the range of records management guidance products available to you. Start by searching or browsing the product listings. [More >>](#)

### Search Descriptions of Tools

- 
- 
- 
- 
- 

Reset

Go

Click on the for the definition of the corresponding tool.  
Click on the to select a search term for the tool.

### Browse Descriptions of Tools

- [Alphabetical list of tools](#)
- [List of tools sorted by organization](#)

# Newest Tools

### New Tools

[Department of Homeland Security \(DHS\) - Records Management Guidance for Email Management Presentation](#)

[National Oceanic and Atmospheric Administration \(NOAA\) - Procedure for Scientific Records Appraisal and Archive Approval: Guide for Data Users and Producers](#)

[National Oceanic and Atmospheric Administration \(NOAA\) - Procedure for Scientific Records Appraisal and Archive Approval: Guide for Data Managers](#)

[Continuing Study of Federal Agency Recordkeeping Technologies - 2008](#)

[FAQs in Response to the What's & Why's of Electronic Formats NARA Accepts](#)

# Search Descriptions of Tools

? Specific Records Technologies



Topic

? Web Content



Sub-topic

? Select An Occupation



Occupation

? Select An Organization



Organization

? Search by Keywords

Key words

Reset

Go

## [Australian Government Information Management Office - Archiving Web Resources: Better Practice Checklist: Practical guides for effective use of new technologies in Government](#)

Outlines a number of issues for consideration when determining and implementing strategies for creating and maintaining records in "online" resources, such as web sites.

### **Get the tool at:**

<http://www.finance.gov.au/e-government/better-practice-and-collaboration/better-practice-checklists/archiving.html>

## [Expanding Acceptable Transfer Requirements: Transfer Instructions for Permanent Electronic Records WEB CONTENT RECORDS](#)

Specifies requirements for transferring permanent web content records to NARA.

### **Get the tool at:**

<http://www.archives.gov/records-mgmt/initiatives/web-content-records.html>

## [IBM Center for Business in Government - The Blogging Revolution: Government in the Age of Web 2.0](#)

Describes a set of lessons learned and a checklist of best practices for government agencies faced with growing use of blogging as a means of communication, records creation and information sharing.

### **Get the tool at:**

<http://www.businessofgovernment.org/pdfs/WyldReportBlog.pdf>

## [Implications of Recent Web Technologies for NARA Web Guidance](#)

Discusses the recordkeeping implications of Web Portals, Really Simple Syndication (RSS), Web Logs (Blogs) and Wikis.

### **Get the tool at:**

<http://www.archives.gov/records-mgmt/initiatives/web-tech.html>

**2** Tool ID: 202

## Implications of Recent Web Technologies for NARA Web Guidance

### **2** Brief Description:

Discusses the recordkeeping implications of Web Portals, Really Simple Syndication (RSS), Web Logs (Blogs) and Wikis.

### **2** Full Description:

This document discusses the recordkeeping implications of Web Portals, Really Simple Syndication (RSS), Web Logs (Blogs) and Wikis. The document includes a brief description of each application; implications in managing the records produced by these applications; and information on how to apply the existing NARA web management and transfer guidance to content created, delivered, or managed by these applications. There is also a glossary of terms.

**2** **Organization:** National Archives and Records Administration (NARA)

**2** **Contact:** [Toolkit Mailbox](#)

### **2** Issues Addressed:

Managing web content as records.

### **2** Get the tool at:

<http://www.archives.gov/records-mgmt/initiatives/web-tech.html>

### **2** Format:

Web-based document

### **2** Occupation:

Chief Information Officer/IT Staff, Program/Project Manager, Records Manager, Web Manager

### **2** Subtopic(s):

Web Content

### **2** Related Tools:

**2** **Tool Type:** Guidance

### **2** Copyright:

**2** **Access Constraints:**


**2** **Publication date:** 9/30/2006



Use the Toolkit for Managing Electronic Records to explore the range of records management guidance products available to you. Start by searching or browsing the product listings. [More >>](#)

### Search Descriptions of Tools

 Select A Topic 

 Select A Subtopic 

 Select An Occupation 

 Select An Organization 

 Search by Keywords

Reset

Go

### Browse Descriptions of Tools

 [Alphabetical list of tools](#)

 [List of tools sorted by organization](#)

Click on the  for the definition of the corresponding field

Click on the  to select a search term for the corresponding field

# Browse Descriptions of Tools

ID #	Title	Occupation(s)	Subtopic(s)	Organization	Brief Description
<a href="#">239</a> <input type="checkbox"/>	<a href="#">A Survey Of Federal Agency Records Management Applications (RMAs)</a>	Chief Information Officer/IT Staff, Program/Project Manager, Records Manager	Assessing Systems for Recordkeeping, E-mail, Electronic Recordkeeping Systems, Identifying System Requirements, Implementing Programs	National Archives and Records Administration (NARA)	<p>Provides feedback and lessons learned from Federal agency users of Records Management Applications (RMAs) and E-mail Archiving Software products.</p> <p><b><a href="#">Get the tool</a></b></p>
<a href="#">194</a> <input type="checkbox"/>	<a href="#">AIIM White Paper - Records Management and IT: Bridging the Gap</a>	Chief Information Officer/IT Staff, Records Manager	Communicating about ERM	AIIM (The ECM Association)	<p>Deals with the issue of bridging the gap between Records Managers and IT to improve the communications between these key disciplines.</p> <p><b><a href="#">Get the tool</a></b></p>

# Summary

- <http://toolkit.archives.gov>
- NARA adds tools on a regular basis
- State, Federal, private, international governments, academic consortia, etc.
- E-mail, Web 2.0, RMA Readiness, ERM in the SDLC, Standards, training, studies, preservation
- Locate tools by searching or browsing

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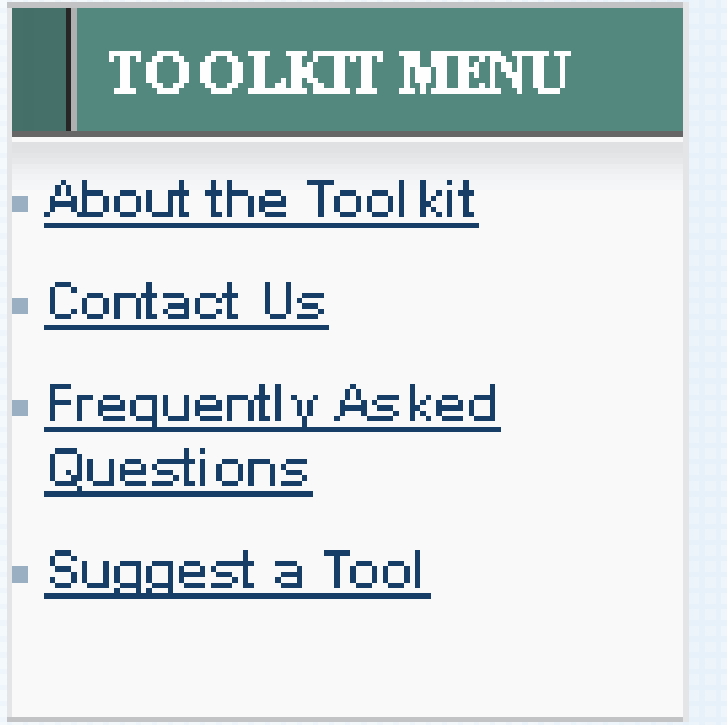
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# Suggest a Tool



- Click on “SUGGEST A TOOL” in Toolkit menu
- Send an e-mail to [toolkit@nara.gov](mailto:toolkit@nara.gov)

Thank you!

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