# Word of the Week:  Lifecycle.

## Slide 1: Title slide – Word of the Week: Lifecycle.

Image on slide: National Archives logo (an eagle with one wing outstretched over the words "National Archives.")

Narrator:  Our word of the week is lifecycle. When we're thinking about how to manage our records, we often use the model called the Records Lifecycle.  It's the idea that records, like plants, animals, or people, have a life span.

## Slide 2: Records Lifecycle.

Narrator:  In the records lifecycle, a record is born – it's created or received.

Image on screen:  A document appears and grows as part of a flower.

Narrator:  During that record's life, it will probably be stored and retrieved, maybe on a network, or in a file cabinet or a records center.

Image on screen:  The document flower joins other documents attached to a file cabinet.

Narrator:  Then, after a period of time, that record reaches its ultimate fate.  Some records that have great historical value and meaning will go on to live forever in an archives.  Many other records will simply be deleted or destroyed when they no longer have value for the organization and its customers.

Image on screen:  One document flies up and enters the National Archives (represented by a line drawing showing the front columns of the Archives).  Another document flies down into a shredder.

## Slide 3: Records Lifecycle.

Image on screen:  A line stretches from left to right.  First on that line are the words "Creation / Receipt," with images of a clip board, a letter, and a laptop computer.  Next on the line are the words "Maintenance and Use" with images of a CD-ROM, a computer server, a file cabinet, and two boxes. Last on the screen are two arrows growing out of the line.  One arrow points up to a drawing that represents the National Archives.  The other arrow points down toward a shredder.  Each segment of the line is circled by a blue line as it is described by the narrator.

Narrator:  Records managers do have different ways of looking at the life span of a record.  This is the model we most often use when we talk about the lifecycle.

A record starts out its life when it is created or received.  You might prepare a report, or you might receive a letter, a completed form, or an e-mail from a customer.

Throughout its life, that record is stored, maintained, and used.  The record may be kept for a short period of time, or for quite a long time, depending on the value it has for the organization, and hopefully, it's maintained in a good recordkeeping system so it can be easily retrieved and managed.

We call that last step in a records life its final disposition.  The value that record has for the organization will determine whether it is kept forever in an archives or is ultimately destroyed when it is no longer needed.  Let's take a look at each of these steps.

## Slide 4:  Creation and Receipt.

Image on screen:  The words "Creation and Receipt" appear in the top left corner.  On the lower left corner is a single bullet point that reads, "Identifying and capturing."  On the right side of the screen appears a document.  Over the top of the document is a light bulb (signifying an idea) and a thought balloon.  The document is thinking, "I'm a record!"

Narrator:  The first step, Creation and Receipt, is usually where we identify and capture that record.  This is a critical step, because the things we do up front help us ensure that the record can be found, used, and understood all throughout the rest of its life span.

## Slide 5:  Creation and Receipt.

Image on screen:  The words "Creation and Receipt" appear on the top left corner.  On the lower left side are two bullet points.  One reads, "Connecting related records," and the other says "Capturing context."  On the right side of the screen is a document.

Narrator: As you're capturing a record, you have the best chance to make sure that record can be connected to other related records, so you can have a complete picture of what happened or what work was done.
Image on screen:  As the narrator describes the examples, an image depicting several file folders, documents, and a laptop computer appears.  An arrow links the first document with the additional, related documents.

Narrator:  You also have the chance to capture information that will help you and others understand the context of the record.  For example, you might capture the title, author, or date of a document, or the project number or name, or you might capture an e-mail message's sender and recipients, its attachments, and all the other information you'll need to be sure you have a complete record.
Image on screen:  A text box appears with additional information about the record.  The box contains three bullet points reading, "Final report.  Project 1234.  June 3, 2014."

## Slide 6:  Creation and Receipt.

Image on screen:  The words "Creation and Receipt" appear in the top left corner.  On the lower left side is one bullet point that reads, "Identifying records schedules."  In the middle of the screen is the document from previous slides.  It has a thought bubble over its head with a picture of a notebook marked "Records Schedule," and it is thinking "10 years."

Narrator:  We also need to identify the records schedule that applies to the record.  A records schedule is an official document that tells us how long each type of record needs to be retained, and the schedule tells us what ultimately will happen to that record.  In the U.S. Federal government, all records schedules are reviewed and approved by the National Archives.

When we know what the schedule says, we can make better choices that will allow us to retrieve and manage the record throughout its whole life span.

## Slide 7:  Maintenance and Use.

Image on screen:  The words "Maintenance and Use" appear in the top left corner, surrounded by images from the life cycle diagram for that phase, including a computer server, a file cabinet, a box, and a CD-ROM.  On the middle of the slide are two bullet points reading "Storage and retrieval" and "Access and security."

Narrator:  That first step in the lifecycle is critical, but we still have more to do to make sure our records survive and thrive.  When you're planning how you will maintain and use your records, you will want to make choices that will help you and others find and manage the information quickly and easily.   You can set up good paper and electronic storage and filing systems and use tools like file plans to help everyone find what they need.

You'll also  look for ways to protect and back up your records, and you'll want to choose effective, good quality storage for those records so they're safe, secure, usable, and available to the people who need them for as long as they're needed.

## Slide 8:  Disposition.

Image on screen:  The title, "Disposition," is followed by two main bullet points.  The first point describes disposition as "The ultimate 'fate' of the record."  That bullet point is followed by two definitions.  The first reads, "Permanent – To National Archives."  The second reads, "Temporary – Delete/Destroy."  The second major bullet point reads, "Good processes and systems help track and manage transfer and destruction."  Also on the slide are the two end graphics from the records lifecycle diagram.  One represents the National Archives; the other represents a shredder.

Narrator:  The final disposition for the record tells us its ultimate fate.  In other words, what should happen to that record?

The National Archives is the final home for a small but important percentage of the records in the Federal government – somewhere around 2 to 5 percent of the records in most agencies.  We call these permanent records.  They have significant historical or other value that makes them worth keeping forever.

For most agencies and companies, the vast majority of their records ultimately will be destroyed or deleted when they no longer have business, legal, or other value for the organization and its customers.  The records schedule tells us how long those records must be kept and when they can be destroyed.  In the Federal government, we call these "temporary" records.

We manage this phase of the life cycle through good procedures, policies and systems that help us track and manage the transfer of records and the destruction of temporary records that have reached the end of their life spans.

## Slide 9:  Records Lifecycle.

Image on screen:  The image depicting the records lifecycle appears again.  As the narrator describes the three main phases, the graphics from the original diagram (laptop computer, file cabinet, etc.) are replaced by words describing key elements of that portion of the lifecycle.

Narrator:  So, that's the records lifecycle.  When you know what the records schedule says and you're aware of the different stages in a record's life, you're better able to plan for and manage the things that need to happen at each point along the way.

Image on screen:  The words Creation / Receipt are highlighted, and three text boxes saying "Connecting related records," "Capturing information about the record," and "Identifying the records schedule" appear.
Narrator:  By having good procedures in place at the beginning of the lifecycle, we can make sure that records are captured and stored in a way that helps us retrieve, manage, and understand the records for as long as they are needed.

Image on screen:  The words "Maintenance and Use" are highlighted, and three boxes containing the phrases, "Storing the records in good recordkeeping systems," "Security and backups," and "Choosing good onsite and off-site storage" appear.
Narrator:  By having good records systems in place, we can make it much easier for everyone to locate, retrieve, and use the records when they're needed.

Image on screen:  The word "Disposition" is highlighted, and two boxes with the words "Records transfer procedures" and "Secure records disposal" appear.
Narrator:  And, by recognizing and applying the right schedules to the right records, we can make sure that we're keeping important information for the right amount of time.  Good, basic records management techniques will help us ensure that our most important records are preserved for future generations, and good management will  help us weed out expired records so we can invest our time, our resources, and our space in the records we do need to keep.

## Slide 10: Final slide.

Image on slide:  "For more information about the U.S. National Archives and records management, visit www.archives.gov."
Narrator:  If you'd like more information about managing records throughout the lifecycle, visit us online at archives.gov.