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BRIDG

Bi- Monthly Records and Information Discussion Group

To Ask Questions

Chat via YouTube

or

Email rm.communications@nara.gov

December 14, 2021

Welcome

Gordon Everett

Director

Federal Records Centers Program

- Welcome

- Federal Records Centers Program Updates

- NARA's Records Management Office: Leveraging Enterprise Technologies to Manage Records

- GRS Updates

- 2021 Annual Reporting Reminder

- Records Management Training Updates

FRCP Updates

Gordon Everett

Director

Federal Records Centers Program

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Leveraging Enterprise Technologies to Manage Records

Deborah Armentrout

CRM/Federal Specialist
Director, Corporate Records Management and
Agency Records Officer

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CORPORATE RECORDS

VERSUS

HOLDINGS

VERSUS

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OFFICE *of the* CHIEF RECORDS OFFICER

Internal: Corporate records are the Federal records NARA staff create or receive in the course of conducting NARA's business.

External: Holdings are the permanent Federal records created by all agencies that have been accessioned by the National Archives of the United States.

Some of NARA's **corporate records** may become **holdings** if the records have permanent archival value.

Ensures that Federal agencies handle the records of U.S. Government activities appropriately by following the Federal Records Act. CM follows the regulations and guidance promulgated by this program, just like any other agency.

All NARA records schedules will be reviewed and revised to be aligned with current work processes and electronic recordkeeping.

- Draft records schedules based on functions and activities
- Obtain formal NARA approval (*just like any other agency*)
- Publish new schedules and distribute policy document
- Update office file plans and system inventory tracker
- Revise rules in repositories containing records
- Write FAQs or disposition plans, as needed

- Determine upcoming transfers of temporary and permanent paper/analog records

- Obtain information on *possible* exceptions to electronic records

- Submit a business case for exceptions to the [Office of the Chief Records Officer, per NARA Bulletin 2020-01](#)

eMESSAGES

- Use Capstone approach for *all* electronic messages

- Manage email via ZL Unified Archives (ZLUA)

- Capture text messages from NARA phones

- Capture chat in Google vault

- Capture voicemail is an option

PERMANENT

- ZLUA ingests from Permanent Records Google Shared Drives

- Customer Relationship Management

- System (Salesforce) has records retention rules

- Social media records are captured in Archives Social

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TEMPORARY

- Temporary Records are on Google in Shared Drives.

- Customer Relationship Management System has records retention rules.

- ZLUA is a potential solution for high risk, high value, long term temporary records.

- Manage in place is likely solution for short term, lower risk, lower value, administrative records.

- Machine Learning/Artificial Intelligence is being considered.

Leveraging Technologies for RM

GOVERNANCE

- IT governance groups and business need/case review

- Core Requirement

- RIM Certification Program (pre and post invest/select)

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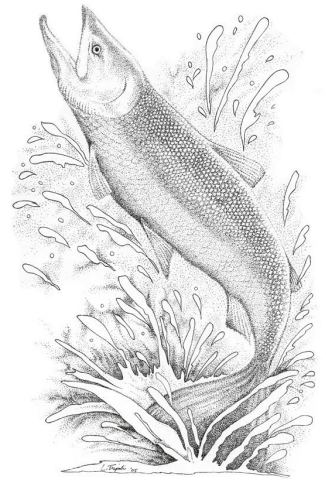
Managing records requires keeping an eye on technologies that are being deployed across the enterprise.

Contact me:
Deborah.Armentrout@nara.gov

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GRS Updates

Andrea Riley

Operations Research and Support Team

GRS Status Updates

- GRS status updates are posted on the GRS website at archives.gov/records - mgmt/grs/grs - status - updates

- We generally send out AC Memos announcing when there are significant updates

Issuance currently expected in early 2022

Includes:
- GRS 2.7, Employee Health & Safety Records: vaccination-related records
- GRS 4.4, Library Records: Clarification that it does not apply to standalone libraries
- GRS 5.6, Security Management Records: Clarification of exclusions and other minor revisions
- GRS 5.7: Clarification where items only apply to administrative functions; also a revised title, Administrative Management & Oversight Records
- Minor updates to items in GRS 2.4, 4.2, and 5.3

Includes:

- GRS 2.7, Employee Health & Safety records: Additional changes related to the COVID pandemic

- GRS 3.2, Information Systems Security records: New items for cybersecurity logging records

- GRS 4.2, Information Access & Protection records: Minor revisions due to changes in guidance

- GRS 4.5: New GRS for original source records that have been digitized

- GRS 5.2, Transitory & Intermediary Records: Removing source records and clarifying what is transitory vs. intermediary

- GRS 5.7, Administrative Management & Oversight Records: Updates to supersede reporting items from GRS 4.2

Issuance is dependent on issuance of the new regulations setting standards for digitizing permanent records.

- Phase 1: Machine - Implementable Disposition Authorities
  - Posting the initial Machine - Implementable GRS file in CSV format on our website
  - The file is application agnostic
  - Includes those items that can currently be translated into a machine - implementable format
  - Items not in the CSV file are still valid authorities
  - We will continue to update the file when new GRS are issued
  - There are 70 - some items that need to be revisited so that they can be translated
  - We expect revisions to be completed by end of CY 2022

- Phase 2: Further streamlining of the GRS
  - Looking at more standardized disposition instructions
  - Plan to align the GRS with the Federal Integrated Business Framework (FIBF)

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Federal Agency Records Management Annual Reporting

Don Rosen

Director of Records Management Oversight and Reporting

- When: January 10 through March 11, 2022
- What: Three reports
  - Senior Agency Official for Records Management Report
    - Focuses on the impacts of COVID-19 and Information Governance frameworks, M-19-21 goals
  - Federal Electronic Records and Email Management Report
    - Maturity model unchanged
  - Records Management Self-Assessment
    - Substantially unchanged
- Next: On January 10th
  - Watch for AC Memo with SAORM Report template
  - Watch for *two separate* links from the survey tool

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Records Management Training Program Update

Christopher Kline, Director
Michelle Bradley, Supervisor

- **AROC:** Agency Records Officer   Credential

- **86** Agency Records Officers currently enrolled

- AROC Cohorts
  - Every 2 months
  - Weekly Support Sessions

- Contact   rmt1@nara.gov

- **ReMIS:** Records Management Instruction Support

- Consults & assists federal agencies on RM training

- Downloadable Training Material

    - Lessons and Microlearning

    - Job Aids and Resources

- In FY 21:

    - 52 completed projects

    - Provided assist to over 40 agencies

- Webpage: archives.gov/records - mgmt/training/remis

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Records Management Instruction Support (ReMIS)

Records Management Instruction Support (ReMIS) is a free service provided by NARA's Records Management Training Program. The goal of ReMIS is to provide Agency Records Officers with tools they need to design, develop and implement records management training in their agencies. ReMIS experts provide consulting on records management training , design and development and access to NARA records management training materials.

Training Development Support

Mentoring and guidance around target audience needs, task analysis, lesson design and development, implementation, and evaluation for records management training. ReMIS provides:

- Subject matter expertise in record management training instruction and design. This includes, but is not limited to:
  - Recommendations of NARA Records Management (RM) lessons that can be bundled together, by the agency, to present material on specific topics (e.g., email, records inventories, electronic records).
  - Remote observation of training and feedback
  - Review of agency created course materials for RM content.

- Tools and templates for instructional design and development
  - Course Assessment Form 🗎
  - Instructor Feedback Form 🗎
  - Basic RM Fundamentals training that can be tailored and loaded onto your Learning Management System and will assist you in meeting the minimum requirements of NARA Bulletin 2017-01
    - Example
      - Millennium Challenge Corporation RM Fundamentals for Capstone Officials

Slides to use as a starting point for developing your own training
- RM Fundamentals
- Records Custodians
- Record Liaisons
- Mission Specialist positions

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Instructions on how to download the files.

If you would like to download and use these lessons in your organization, you have three options:

1. **LMS/SCORM** - Download the LMS/SCORM file for use in your agency's learning management system. The files are compiled as SCORM 1.2.
2. **Storyline Source File** - Most of our online lessons are built in Articulate 360. Download the .story file if you would like to edit or modify the lessons in Storyline.
3. **Web** - Download the zipped web file to host the lesson on your agency's intranet or website.

Level One Lessons are Primarily for Custodians

Code	Title	Description	Source Files (downloadable)	Date Updated
		Terminology		
L1.001	What is the Records Lifecycle?	This module discusses the phases in the records management lifecycle. Length: 0:10:00	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. Length: 0:10:00	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. Length: 0:10:00	1. LMS/SCORM 2. Storyline Source File 3. Web package	11/10/2020

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Microlearning Lessons

Microlearning modules are short lessons that deliver targeted, bite-sized training on a single topic in 10 minutes or less. Use these mini-lessons to enhance your own knowledge or introduce new records management topics to staff in your agency. Select the title to begin a lesson. You may also download the source files for use in your own program from the Source Files column to the right.

Instructions on how to download the files.

If you would like to download and use these lessons in your organization, you have three options:

1. **LMS/SCORM** - Download the LMS/SCORM file for use in your agency's learning management system. The files are compiled as SCORM 1.2.
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Code	Title	Description	Source Files (downloadable)	Date Updated
M1-001	Ask an E-Records Expert: Email Accounts	In this activity, you will review the requirements that affect how long email messages must be kept.	1. LMS/SCORM 2. Storyline Source File 3. Web	3/29/2021
M1-002	Ask an E-Records Expert: Email Retention	In this activity, you will explore the official policy for the proper use of email as a government employee.	1. LMS/SCORM 2. Storyline Source File 3. Web	3/29/2021
M1-003	Ask an E-Records Expert: Social Media	In this activity, we will help you understand your responsibilities and navigate the rules for using social media by Federal government agencies.	1. LMS/SCORM 2. Storyline Source File 3. Web	10/27/2021

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Records Management Training Videos and Webinars

This page contains videos that may be completed from this page. Select the title of the video.

Please note that the table below is searchable and sortable, click on any of the header cells to sort by that column:

Show 10 entries   Search

Code	Title	Description
V1.041	5 Things -to-Know	This video provides the Five things new federal employees need to know about their records management responsibilities when starting their federal employment. Length: 2:40
V1.042	What is Capstone?	This short video defines the Capstone approach to email management. Length: 0:01:09
V1.043	5 Things You Need to Know About Records Management for the Mid-Career Employee	This short video is a refresher for federal employees well into their careers, this short video reviews the five things they need to remember about their records management responsibilities. Length: 4:07

Showing 41 to 44 of 44 entries

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@NARARMT

A "cat scan" is NOT a digitization process

Find out more about the digitization processes for records management at https://www.archives.gov/files/records-mgmt/training/material/L2-005/story.html

US National Archives Records Management Training Program
September 20 ·

Monday Morning Musings
The side eye you give your Program Manager when he tells you his office has been storing a pallet-sized batch of unscheduled records in the ceiling tiles for nearly a decade.

Can you relate? Feel free to share your side-eye moments in the comments below.... See more

👍 Like   💬 Comment   ➤ Share

RECORDS MANAGERS: KNOW YOUR TERMS
Table showing original series-by-series disposal authority and how that series fits into the new categories

c [ ] s [ ] wa [ ]

DRAFTING A NEW PROCEDURE FOR HANDLING FROZEN RECORDS?

DOCUMENTS

Check NARA's Records Management Training Guidance

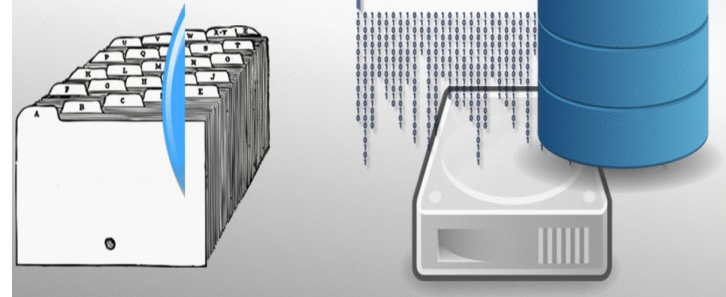Link above takes you directly to web-based resources

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FIND A MODERN WAY
TO ORGANIZE
ELECTRONIC RECORDS

Records Lifecycle

Creation or
Receipt

Records
Management
Training
Cheer!

Happy Holidays

Records Management Training Mailbox:
rmt1@nara.gov

Director, Eddie Kline:
christopher.kline@nara.gov

Supervisor, Michelle Bradley:
michelle.bradley@nara.gov

Records Management Training Program Website:
archives.gov/records - mgmt/training

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General Q&A

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NEXT MEETING

Wednesday
February 23, 2022
1:30 pm EST/10:30 am PST

rm.communications@nara.gov

Bi - Monthly Records and Information Discussion Group

archives.gov/records   - mgmt/meetings/index.html

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