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NATIONAL ARCHIVES AND RECORDS ADMINISTRATION

# Bi-Monthly Records and Information Discussion Group

**To Ask Questions**

**Chat via YouTube**

*or*

**Email:**

**[rm.communications@nara.gov](mailto:rm.communications@nara.gov)**



**June 13, 2023**



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# Welcome

## Laurence Brewer

### Chief Records Officer for the U.S. Government



- Chief Records Officer for the U.S. Government update
- Federal Records Centers Program (FRCP) update
- Briefing from the Federal Records Officer Network (FRON)
- ERA 2.0 status updates



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# Digitization Updates

**Laurence Brewer**  
Chief Records Officer  
for the U.S. Government



## Regulations with digitization standards for permanent records are published!

- Regulations available at: <https://www.ecfr.gov/current/title-36/chapter-XII/subchapter-B/part-1236/subpart-E>
- Records Express blogs posts on digitization available at: <https://records-express.blogs.archives.gov/category/36-cfr-1236-subpart-e/>
- Digitization resources website available at: <https://www.archives.gov/records-mgmt/policy/digitization>
- June 7, 2023 webinar slides available on the website.

Records Management Policy and Standards Team can be contacted at:  
[rmstandards@nara.gov](mailto:rmstandards@nara.gov)



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# Federal Records Centers Program Updates

**Christopher Pinkney**  
Acting Director  
Federal Records Centers Program



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# Briefing from the Federal Records Officer Network (FRON)





## **Overview of the Federal Records Officer Network (FRON)**

**BRIDG Meeting  
June 13, 2023**

# Agenda

- Intro to FRON Leadership Team
- Background
- Purpose of the FRON
- FRON Membership
- Collaboration Opportunities
- Monthly Meetings
- Topics and Discussions
- MAX Collaboration Site
- FRON Accomplishments

# FRON Leadership Team

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- Ron Swecker, SweckerR@sec.gov, Securities and Exchange Commission
- Laura Besong, Laura.Besong@usdoj.gov, Executive Office for United States Attorneys
- Matthew Hebert, Matthew.Hebert@usdoj.gov, Department of Justice
- Christopher Magee, CMagee@WAPA.gov, Western Area Power Administration
- Susan Little, Susan.Little@cms.hhs.gov, Centers for Medicare & Medicaid Services



# Background

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- **Fall 2012** - Small meeting around interest in coordinating training
- **Early 2013** - Idea of FRON developed
- **March 2013** - FRON goes virtual with MAX collaboration site
- **June 2013** - FRON goes face-to-face with first formal meeting
- **Present** - FRON serves approx. 300 members representing Federal agencies and the military



# Purpose of the FRON

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We are a network of Records and Information Management professionals that address programmatic issues that exist across Federal agencies. The main goals are to:

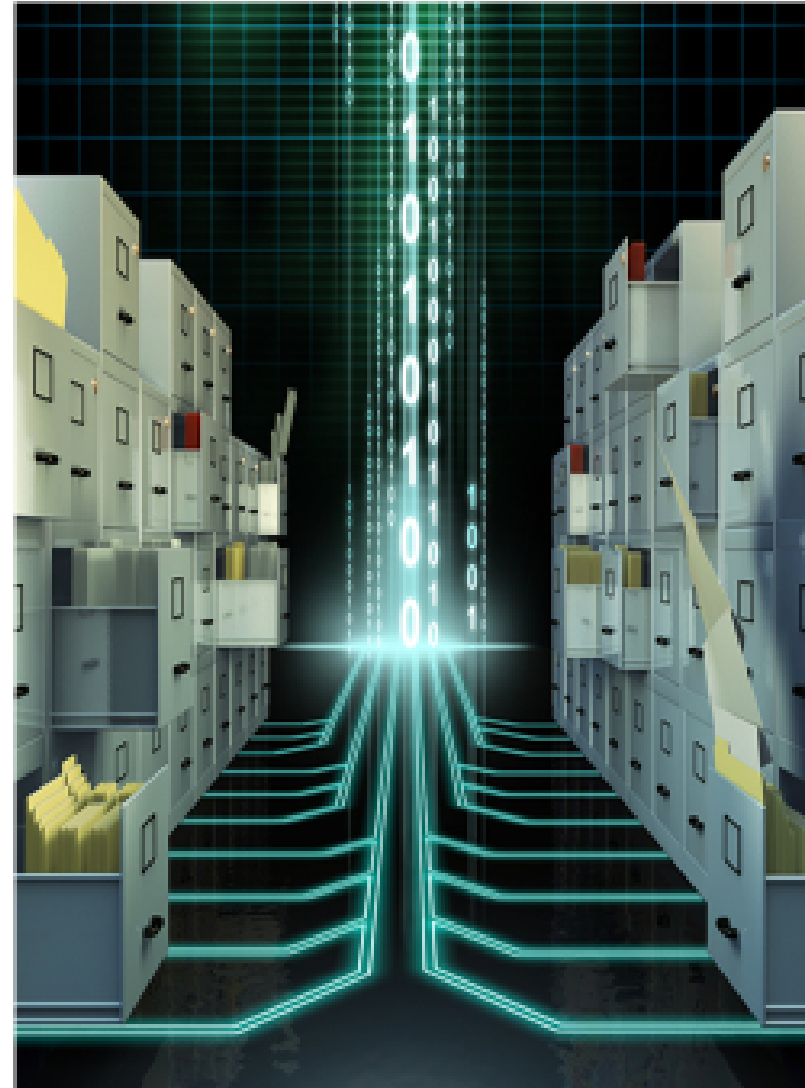
- Share experiences
- Leverage best practices, tools, and templates
- Leverage the collective efforts to address common issues
- Collaborate and help each other find success



# FRON Membership

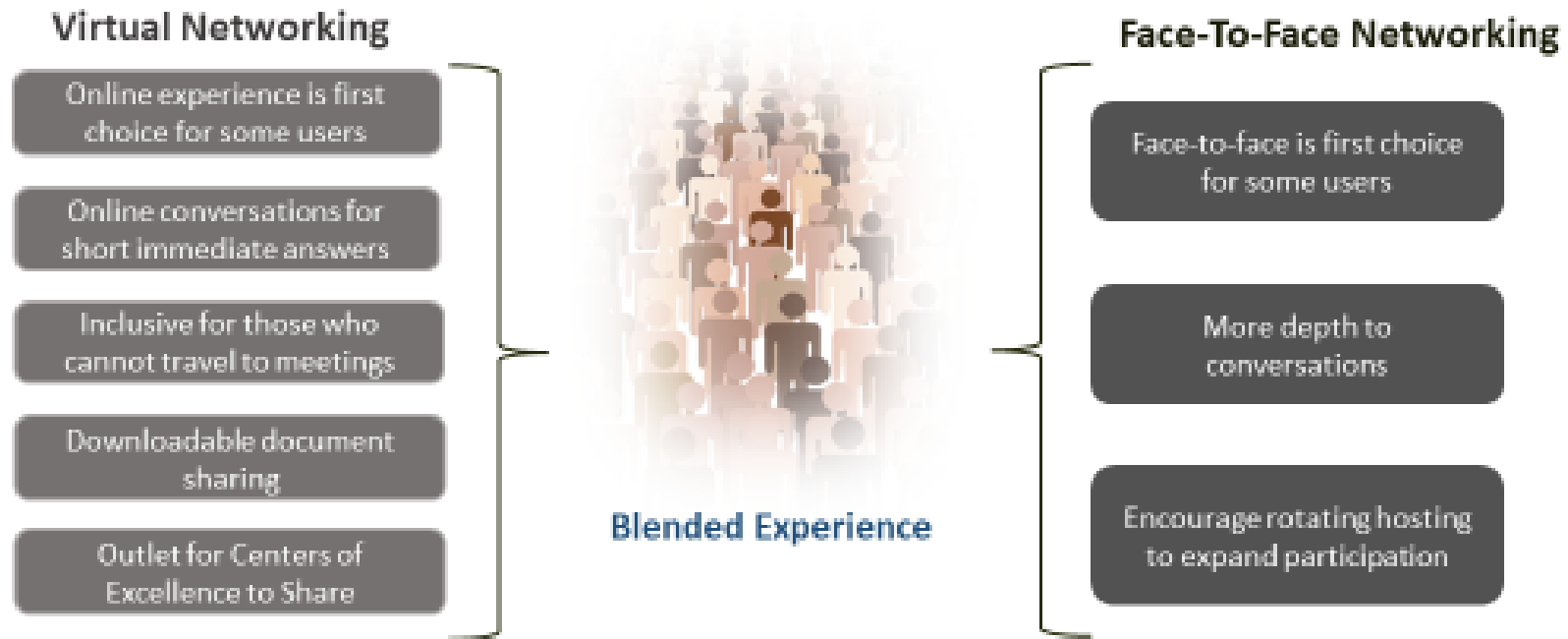
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- Open to all Federal Records Officers and those actively involved in the advancement of records and information management
- Not limited by size or type of agency or branch of the Federal government
- For those who would like to join the FRON, please contact the FRON Leadership Team



# Collaboration Opportunities

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Note: The FRON has not met in-person since before the pandemic. We are considering in-person events soon.

# FRON Monthly Meetings

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- Hosted and facilitated by the FRON Leadership Team
- In-depth discussions of hot topics
- Ongoing efforts are discussed
- New topics are introduced
- Ability to utilize breakout rooms for brainstorming
- Post-covid we have transitioned to an online meeting



Join us for our monthly meetings the second Tuesday of the month.



# Topics and Discussions

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- All members have input on scheduling and priority of the topics:
  - Electronic records management
  - Email management, electronic messaging and implementing Capstone
  - Core competencies for records and information personnel
  - Common records and information management training
  - Federal RIM Maturity Model
  - RIM requirements for electronic systems
  - Policies, tools and templates
  - Impact and best practices leveraging M365



# MAX Collaboration Site

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- Hosted by OMB
- Online Discussions
- Repository of policies, tools, and templates for sharing
- Listing of RIM-related events
- Meeting materials
- Network with the Federal RIM community



# FRON Accomplishments

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- Developed online RM 101 Training that can be used by any Federal agency
- FRON members developed comments for OPM's draft RIM job series flysheet that resulted in OPM withdrawing the flysheet and completely revising the content.
- Conducted meetings with similar communities like the Chief Data Officer Council, FOIA Advisory Committee, Council of Inspector Generals for Integrity & Efficiency, and the Federal Knowledge Management Community
- FRON meets the requirements of OMB Circular M-12-18 (B2) for a Community of Interest to solve records management challenges





Thank you!



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# Updates on ERA 2.0

**David Lake**

Program Manager, ERA

**Sam McClure**

Electronic Records Program Director

- **Authentication testing/account verification**
  - Underway
- **Use of ERA 2.0 for Records Schedules and Transfer Requests**
  - About to begin – today we’ll provide the timelines for when you can start your work in ERA 2.0
- **First uses of upload by a small number of select agencies**
  - Starting with a very limited number of agencies who have electronic records eligible for transfer
  - If you have electronic records ready for transfer, contact the accessioning archivist associated with your transfer to determine if direct upload via ERA 2.0 is the appropriate means of transfer



# Status of Data Migration from ERA Base

- 99% of the more than 104,000 forms have been migrated to ERA 2.0
  - Records Schedule data and Transfer Requests from ERA Base
  - (Last Cycle's) NA-1005/Capstone Forms from non-ERA sources
    - For reference only - workflow for new Capstone forms not yet available
  - Remaining forms require additional effort and will be migrated over the summer
  - Some migrated forms arrived in ERA 2.0 in incorrect statuses and will be corrected over the summer as well





# Use of ERA 2.0 for Records Schedules and Transfer Requests - Timelines

## Transfer Request Process

- Work on Transfer Requests in ERA 2.0 can resume starting on Tuesday, June 20th

## Records Schedule Process

- NARA will also resume work on Records Schedules in ERA 2.0 with a select number of agencies next week
- We will announce when all agencies can resume work on Records Schedules as soon as possible (targeting July)

- Intermittent problems generating PDF and CSV exports of forms
- Additional intermittent problems that affect individual forms and/or individual users
  - Some forms “blocked” from use
  - Some account setups needing correction
- Frequent system updates coming this summer to correct issues and to provide for continuous enhancement and improvement of the system

- Access to ERA 2.0 requires both an active ERA account and a MAX.gov profile
  - ERA Service Desk: [erahelp@nara.gov](mailto:erahelp@nara.gov) or at 877-ERA-9594
  - MAX.gov account assistance: [MAXSupport@max.gov](mailto:MAXSupport@max.gov) or 202-395-6860
  - Authenticator app option
- Access via PIV/CAC
  - If you do not have access to a PIV/CAC, contact the ERA Help Desk



# Support for Transition to ERA 2.0

- Training Materials - <https://www.archives.gov/era/training>
- User Manuals - <https://www.archives.gov/era/records-mgmt/records-mgmt/era/agency-manual>
- Account Support - <https://www.archives.gov/era/records-mgmt/account-request.html>



# Next “Office Hours” Session

- Friday, June 23 at 2:00pm ET
  - Meeting information will be shared by ERA System Notice email
  - Email [sam.mcclure@nara.gov](mailto:sam.mcclure@nara.gov) if you want the meeting information



# General Q&A

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# **NEXT MEETING**

**Tuesday**

**August 15, 2023**

**1:30 pm EST/10:30 am PST**

All upcoming BRIDG meeting dates  
and previous recordings/slides are at:  
[archives.gov/records-mgmt/meetings/index.html](https://www.archives.gov/records-mgmt/meetings/index.html)



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# Technical Difficulties Please Stand by

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