



The National Archives and Records Administration
Building the Electronic Records Archives (ERA)
FY 09 ERA Information Session #1
NARA and the ERA Pilot Agencies

Date: Wednesday, November 12, 2008

Place: Archives II, 5220 Conference Room

Time: 1:00 - 2:00 PM, EST

Teleconference Information: **(866) 212-5678 (Conference ID: 73701721)**

Co-Chairs: Rita Cacas (301-837-1564) and Laurence Brewer (301-837-1539)

Purpose of monthly meetings: To share information and provide updates about ERA system development with the ERA Increment 1 stakeholders.

I. Welcome back from Summer Break (Rita Cacas, ERA PMO) - Since our last meeting on June 23:

- **ERA at RACO** Atlanta (Sep), also ARMA (Oct)
- **IOC** – Occurred on June 27; See IOC Press Release: <http://www.archives.gov/press/press-releases/2008/nr08-125.html> NARA began using the system for work on Monday June 30.
- **Dawn Hughes retired**; Introduce Mary Winstead (acting Div. Director for ERA Communications, Training and User Adoption); welcome back Fynnette (part time, ERA PMO contractor support staff)
- **NARA-UMD IT Conference**, Oct 7-8 in College Park, Archives II and Univ MD. Highlighted ERA Research and System Development. Karen Burnette/BLS attended. For additional information about the conference, <http://www.archives.gov/era/presentations/innovations/it-conference08.html>
- **BRIDG** – Oct 29 meeting: ERA PMO provided a program status (IOC, Training, what's next), invited agencies to join the teleconference. **We need to level expectations:** the monthly teleconference is intended to provide communications between NARA and the 4 Pilot agencies. Non-ERA agencies may listen in, but questions and concerns will be addressed outside of this meeting.

II. Introductions and Re-Introductions

Attendees:

- **BLS:** Karen Burnette
- **NAVO:** Ginger Rieman, Navy HQ: Tony Ciccone, Matt Staden
- **USPTO:** Susan Brown Fawcett
- **NARA:** Brett Abrams, Laurence Brewer, Rita Cacas, Jim Cassidy, Rachel Donahue, Kate Flaherty, Randy Jones, Janet Kennelly (WNRC), David Kepley, Richard Marcus, Nadi Mirvahabi, Sandra Paul-Blanc, Meg Phillips, John Powell, Adrienne Reagins, Robin Riat, Henry Salevsky, Michelle Sonnier, Mary Winstead

III. ERA Updates – Mary Winstead, ERA PMO

- IOC for the ERA (Base) System occurred on 6/27/08.
- One (1) software update to the [ERA Base] system since IOC. Developers continue to work on Problem Trouble Reports (PTRs).
- During August and September, approximately 150 users have been trained to use the system.
- Status of data entry: 364 Records Schedules/items and 1292 Legal Transfer Instruments (LTIs).
- Development of the next instance of ERA, called the *Search and Access* (SAS) System continues and is on schedule to reach its Initial Operating Capability (IOC) on 12/5/08.
- Laurence Brewer asked about the possibility of tracking agency accounts after training. Mary Winstead said it is not being done at this time but could be implemented. Two (2) users from NNSA are having difficulties with their accounts. The users need to go to the ERA Help Desk. Robin Riat said she would gather their information.

- There will be changes to the user account form in December. Need to work on how this information will go out to the Delegated Account Representatives (DARs).
- Sandra Paul-Blanc said that she needed to contact Dave Jacobe (NNSA) regarding system accreditation for system changes. A letter proving that accreditation can be provided if necessary.

IV. Agency Round-Robin (BLS, NAVO, NNSA, USPTO), Status, Successes

Each agency representative was asked to discuss 1) how they expect to use ERA (i.e. schedules, transfers) and 2) what support they need from NARA.

- **BLS** – Everyone has an account but is unable to log in. The issue seems to be IP address, and we are getting the necessary information together for Jan Filsinger. There will be a paper records transfer and some schedule changes in the next few months and electronic transfers after the first of the year.
- **NAVO** – Test data has been sent, and there was an issue with file format but the data was fine. Additional user training is on track for December 3-4, 2008. Schedules have been uploaded and certified, including one (1) 20 item legacy schedule.
- **NNSA** – Under active negotiations for test transfer of records. Unsure of the status of user accounts. Hoping for the first transfer before the end of December. These will be temporary records as NNSA is the test case for temporary records. Temporary records will not be taken from all agencies just yet.
- **USPTO** – Working on a schedule now, will be trying to get it through ERA in the first or second week of December. This particular schedule may wind up being a paper submission rather than via ERA since it is a big bucket schedule. Small files from an already approved legacy schedule will be coming in a direct transfer soon.
Q: How will big bucket work with ERA? Possible future topic

V. Issues/Concerns, Lessons Learned?

- Meg Phillips noted that users have been getting useful help from the ERA Help Desk.

VI. Next Meeting: To discuss: 11am or 1pm?

BLS, NAVO, and USPTO all said the 1:00 time is fine. NNSA will get back to Rita.
 Next meeting is tentatively set for 12/10/08 at 1:00 p.m.

Mtg#4 ID	Date Assigned	Action	Assigned To	Date of Response	Status/Notes	Action Closed
1	Mtg FY08#4 4/23	Pending IP Address to ERA PMO Security (Filsinger)	1) NAVO 2) NNSA		Filsinger absent; pending response and resolution	
2	Mtg FY08 #1 01/23/08	Finalize ISAs.	Sandra Paul-Blanc w/ the four agency ROs	4/23/08 mtg	NNSA, NAVO are moving forward, but no reply yet from PTO or BLS.	
3	FY 09 ERA Information Session #1	Facilitate getting user accounts active at NNSA	Robin Riat	Next meeting		
4	FY 09 ERA Information Session #1	Report on changes to the DAR Form	Jan Filsinger Adrienne Reagins?	Next meeting		
4	FY 09 ERA Information Session #1	How will Big Bucket Schedules work in ERA?	Laurence Brewer, David Kepley & Meg Phillips?		Future topic	
4	FY 09 ERA Information Session #1	Contact Meg Phillips or Robyn White regarding contacting Dave Jacobe	Sandra Paul-Blanc	Next meeting		