

Northwest Power
Northwest Values



1937-2007

S E V E N T I E T H
A N N I V E R S A R Y

RACO WEST Conference

NARA Central Plains Region

Kansas City, Missouri

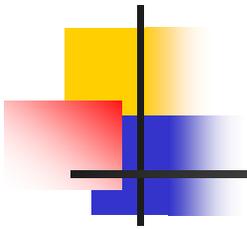
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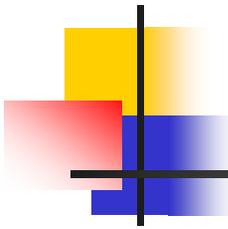
Agencies Perspective for Implementing an e-records repository

- Records Management was challenged with the shift from paper to electronic
- Potential loss of record preservation
- Records Management engaged the CIO
- The CIO directed the Records Officer in November 2003 to recommend an automated records management system



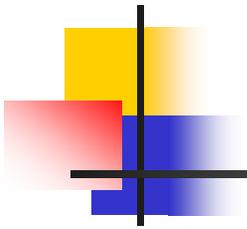
Identifying Stakeholders

- Upper management
- User representation from each of the three business units
- IT Specialists
- Records Management



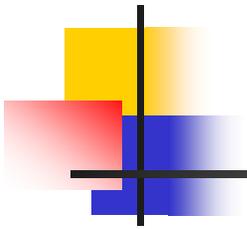
System Development and End Users

- Cross agency team - 22 representatives
- Representatives, IT and Records Management studied RMA requirements
- Addressed Business Line requirements
- Developed a scorecard of DoD 5015.2 requirements dividing it into 4 parts –
 - User
 - Administrative
 - System
 - Technical



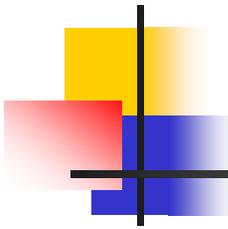
Role of Representatives from the 3 Business Units

- The scorecard items were ranked
- The IT developer demonstrated the application and answered questions
- The representatives rated the application against the scorecard criteria
- Application met over 96% of the requirements
- The business units voted unanimously to recommend SharePoint 2.0 as our ERMS



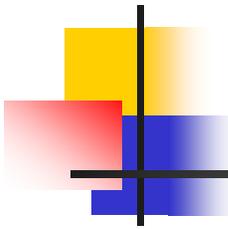
Implementation

- The CIO approved the recommendation from the team and said go forth with implementation
- ERMS rolled out November 15, 2004
- Low cost, no-fail system, with lots of server space, and a repository that keeps growing!



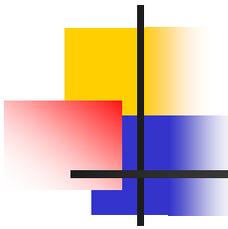
Functional Team

- Communicate and advertise ERMS across the agency
- Develop policies and procedures
- Plan and deliver Records Management and Technical training
- Work with the ERMS implementation team



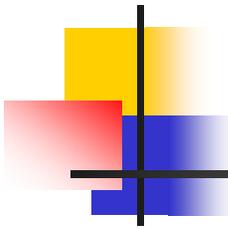
Criteria for Measuring Success

- ERMS is dependable and secure
- ERMS meets requirements of DoD 5015.2-STD and the business needs of our clients
- ERMS provides rapid response to FOIA requests, inquiries and records retrieval
- Key organizations would take the required training and start using ERMS



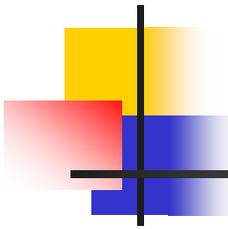
Benefits

- Reduces the risk of losing valuable information and corporate memory
- Secure system that is log-on and password controlled
- Records in ERMS are readily accessible for their life cycle
- Server space and filing equipment minimized



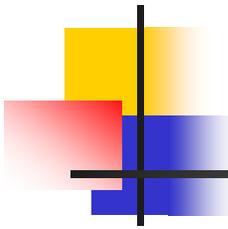
Lessons Learned

- Buy-in and support from Upper Management critical to the success
- Involve those who will be using the system from the onset
- Must have Records Management house in order
- Take baby steps. Pilots are great ways to start, then build from there



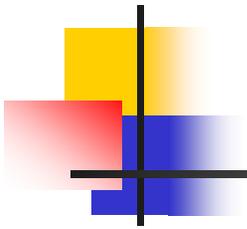
Lessons Learned, contd.

- Get advice from the experts! NARA's Targeted Assistance Program is a fabulous resource
- End-users want a user-friendly system
- Records Management – be prepared to learn from IT
- Teach IT staff basic Records Management



How the e-repository fits into the enterprise-wide architecture

- BPA adopted Microsoft SharePoint as the presentation layer for
 - - document management
 - - internal web
 - - collaboration
 - - electronic records management



What lies ahead?

- BPA is currently installing SharePoint V3
- Version 3 allows even more integration into BPA's enterprise-wide architecture
 - - DOD certification of our ERMS
 - - Workflow
 - - Reporting
 - - Integration with our e-forms program
 - - Content management

THANK YOU

