



NATIONAL
ARCHIVES

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Leveraging Enterprise Technologies to Manage Records

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NATIONAL ARCHIVES *and* RECORDS ADMINISTRATION



Who We Are/Who We Aren't

LEVERAGING ENTERPRISE TECHNOLOGIES TO MANAGE RECORDS



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

VERSUS



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

VERSUS



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.

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



Key to Success - Updating Records Schedules

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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*)
- Incorporate new schedules into the online records schedule
- Update office file plans and system inventory tracker
- Revise rules in repositories containing records



Transition to Electronic Recordkeeping

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eMessages

- Use Capstone approach for all electronic messages
- Manage via ZL Unified Archives (ZLUA)
- Includes text messages from NARA Phones
- Capturing of chats is currently in development
- Captures voice mail as an option

Permanent

- ZLUA ingests from Permanent Records Google Shared Drives
- Customer Relationship Management System (Salesforce) has records retention rules

Temporary

- Working on Temporary Records Google Shared Drives
- Considering the use of ZLUA for high risk, high value, long term temporary records
- Customer Relationship Management Systems has records retention rules
- Short term, lower risk, lower value, administrative records to be managed wherever best suited for the program
- Looking at potential use of Artificial Intelligence/Machine Learning

The records program takes part in IT governance groups and reviews business needs and cases.



Transferring Paper/Analog Records

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- Determine upcoming transfers of temporary and permanent paper/analog records
- Obtain information on exceptions to electronic records
- Submit to the Office of the Chief Records Officer, per [NARA Bulletin 2020-01](#), a business case for exceptions

Questions and Answers

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

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