

Summary of Jan 6, 2004, meeting with EOP re ECRMS at Archives II

Attendees:

EOP:

Keith Regatts – Project Manager
Markus Most – OA Records Officer

Booz Allen (EOP contractor):

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

NARA:

Jason Baron
Bob Spangler
Sam Watkins

Purpose: The EOP has contracted with BAH to gather requirements from stakeholders and users for a new system to collect, preserve, and transfer to NARA, electronic messages. The Electronic Communications Records Management System (ECRMS) will collect all forms of electronic messages and calendars. Instant messaging currently is not allowed in the EOP, but they expect it will be in the future, and ECRMS will be designed to collect those messages when enabled. The system will replace, expand, and enhance the collection currently performed by ARMS, and will be fully compliant with 5015.2.

Several issues re segregation of data by Presidential/Federal, and by EOP organizational element, dominated the meeting. EOP would like to implement ECRMS as a "single instance" storage system, rather than the current "bucket scheme," which preserves one instance of each message in every appropriate agency "bucket." Each message collected by ECRMS would appear only once in the entire system, but would be coded via database tables to identify what organization(s) sent and received the message. These tables would make each message searchable by the organization code.

EOP understands that it must transfer Presidential and Federal data to NARA separately in order to accommodate NARA preservation processing requirements, and would build that segregation into the export/transfer process. However, segregating the active data in ECRMS, either by agency or by PRA/FRA, onto separate media within the system will be very difficult. EOP would like a decision from NARA as to whether this is necessary. In addition, we need to be able to tell EOP whether we need the output for transfer separated simply by Presidential and Federal records, or if we require that the media for each organizational element must be distinct, i.e. OMB, WHO, OA, etc. Jason's question: Is there value to being able to hold a tape in your hand and say "This is the email of the White House Office, January, 2004."?

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All data in the current ARMS system will be migrated into the new system. EOP wanted to know if we would prefer that data to be transferred to the new system with attachments "hexified" as currently stored in ARMS, or if we would prefer them restored to the native format. NARA agreed that we would prefer in native format, based upon our current transfer guidance and search capabilities.

Some attachments in the new system will not be searchable by text for obvious reasons: there is no text associated with digital photos, audio, or video files. Virtually all textual material in the system, either in the message or in attachments, will be searchable, if it is in a standard format such as Word, WP, PDF, Excel, etc.

EOP will provide bulk email sampling capability in the system. The NARA team suggested two sampling modes we would like to see included: a fully automated, randomized sampling conducted without requiring user intervention by either NARA or EOP; and a manual, targeted capability, which could be invoked by NARA in response to special circumstances. EOP documented this as a NARA requirement.

EOP will include transfer testing as part of the acceptance of the system implementation. They will generate test output for NARA, and we will review/process to verify the acceptability of the output.

EOP has been converting from Lotus Notes to Microsoft Xchange over the past two years. They did not say how far along they were in the process, but my impression is that they are nearing completion. Messages in Xchange are NOT being captured in ARMS or any other system external to Xchange, nor do they have plans to capture them prior to implementation of ECRMS. I do not believe that ECRMS can be implemented in less than one year from today. The NARA team emphasized that EOP was operating at risk by not capturing and storing messages outside the email system. This came up at the very end of the meeting, and we need to explore this much further in future meetings with the EOP team, although this is not a requirements issue for ECRMS since it will include the ability to collect these messages.

Schedule: They expect the requirements and "solution design" to be completed by the end of May, 2004. Then they plan to compete a separate contract for development and implementation, with work to begin in late 2004.

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