Just-in-Time Instructions for: Create a New Form Type - Transfer Request

ERA 2.0 recognizes and facilitates the creation and management of two types of forms: 1) Records Schedules and 2) Transfer Requests. To create a Transfer Request, you must select the appropriate form type prior to populating it with your information.

1. Select **Create Transfer Request** from the *Create New Form* drop-down menu located above the Dashboard on your ERA 2.0 Homepage. The Create New Transfer Request dialog window displays.
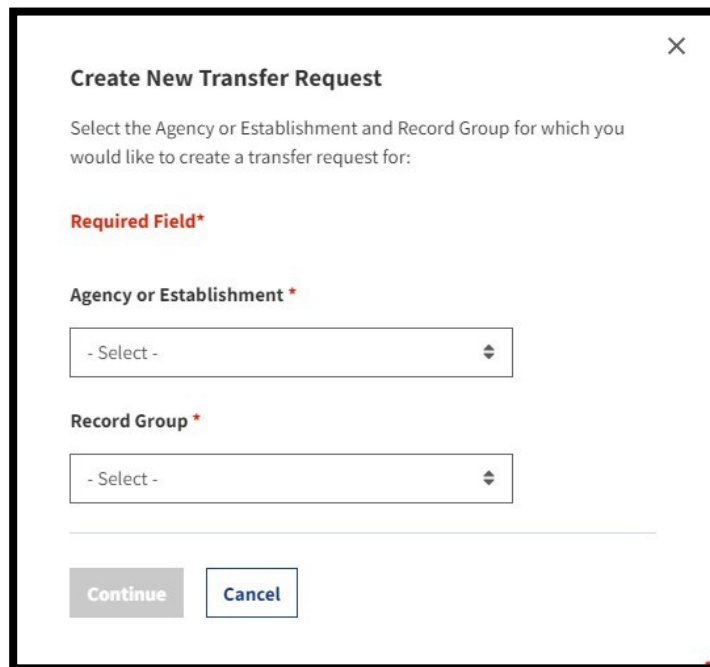

Figure 1: Create New Transfer Request Dialog Window

2. Select your **Agency or Establishment** from the corresponding menu option.

3. Select your **Record/Scheduling Group** from the corresponding menu option.

4. Select **Continue**. The Create Transfer Request page displays.

Office of the Chief Records Officer
National Records Management Training Program
Training Implementation Team
March 2023

Page 1 of 4

Create Transfer Request

Transfer Request Number	Agency or Establishment	Status
TR-0328-2023-0006	National Capital Planning Commission	Draft

Figure 2: Create Transfer Request Page Headers

💡 The *Record/Scheduling Group* dropdown menu contains a list of auto-populated Record Groups or Scheduling Groups within the selected Agency or Establishment. A Record Group is a numeric code used by NARA to uniquely identify an Agency. A Scheduling Group is an alpha code used by NARA only for department-wide schedules in military departments. Scheduling Groups include NU (Department of the Navy), AU (Department of the Army), and AFU (Department of the Air Force).

If you do not have access to the correct Record/Scheduling Group, you should contact your ERA 2.0 Account Manager to start the process of having the value(s) added to your profile. *If your user profile has more than one Agency or Record Group available, you must select the correct Record Group AND Agency.*

Office of the Chief Records Officer
National Records Management Training Program
Training Implementation Team
March 2023

Page 2 of 4

About the Transfer Request Form in ERA 2.0

You will notice on the *Transfer Request* form that ERA 2.0 auto-generates a Transfer Request number based on the current fiscal year, Record Group, and sequential number (i.e., TR-0064-2023-0001). It also pulls over your Agency or Establishment information and sets your form to "Draft" status. Statuses update automatically as the Transfer Request progresses in the workflow. The Transfer Request Number and the Agency or Establishment fields remain the same throughout the entire workflow.

The Transfer Request form contains subsections that are accessible via the following tabs located on navigation menu on the left:

- **General Information:** Contains contextual information that applies to the Transfer Request (e.g., name of Agency, creating office, etc.). The tab consists of the following subsections:

    a. Series

    b. Tracking Numbers

    c. Access Restrictions

    d. Location

    e. Transfer Details

- **Contact Information:** Provides contact information for the points of contact relating to the Transfer Request.

Figure 3: Create Transfer Request Navigation Menu

- **Attachments:** Allows agencies to attach supporting documentation related to the Transfer Request.

- **Additional Reviewers:** Provides the option of requesting additional reviews on the Transfer Request by users within the agency. *Note: This functionality will not be available at*
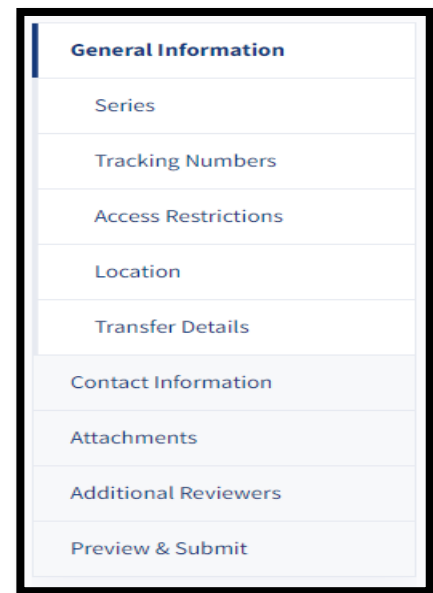
Office of the Chief Records Officer
National Records Management Training Program
Training Implementation Team
March 2023

Page 3 of 4

initial deployment and is outside of the current scope of this job aid.

- **Preview & Submit:** Summarizes all input for the *Transfer Request* form, and provides action options (e.g., **Submit for Agency Approval** or **Propose**) based on the user's role.

The above tabs outline the basic structure of the *Transfer Request* form. You will enter and update information on these tabs prior to submitting your Transfer Request.

💡 You may select **Save and Exit** at any point to save your in-progress work. You may also select **Reset Form** to reset your form to the last saved version.

END.