Just-in-Time Instructions for: Create a New Form Type – Records Schedule

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 new form, you must select the appropriate form type prior to populating it with your information.

Below are the instructions for creating a **Records Schedule Form Type** in ERA 2.0. *Instructions for creating a Transfer Request form type in ERA 2.0 are also available on the ERA 2.0 Training site.*

Create a New Form Type – Records Schedule

1. Locate the **Create New Form button** that displays just above your Dashboard on your ERA 2.0 Homepage.

2. Select **Create Records Schedule** from the *Create New Form* drop-down menu.

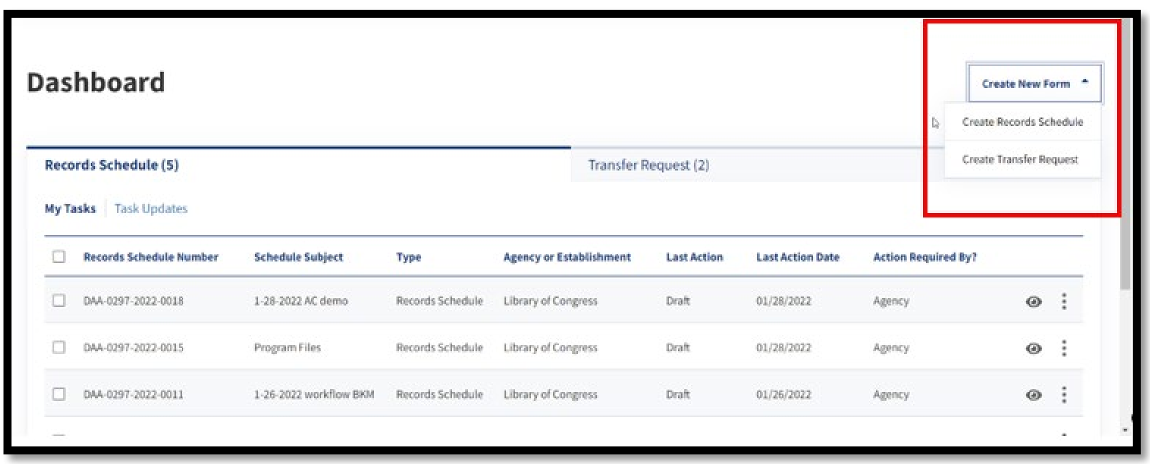

Figure 1: Create New Form Drop-Down Menu

The Create New Records Schedule dialog window displays.

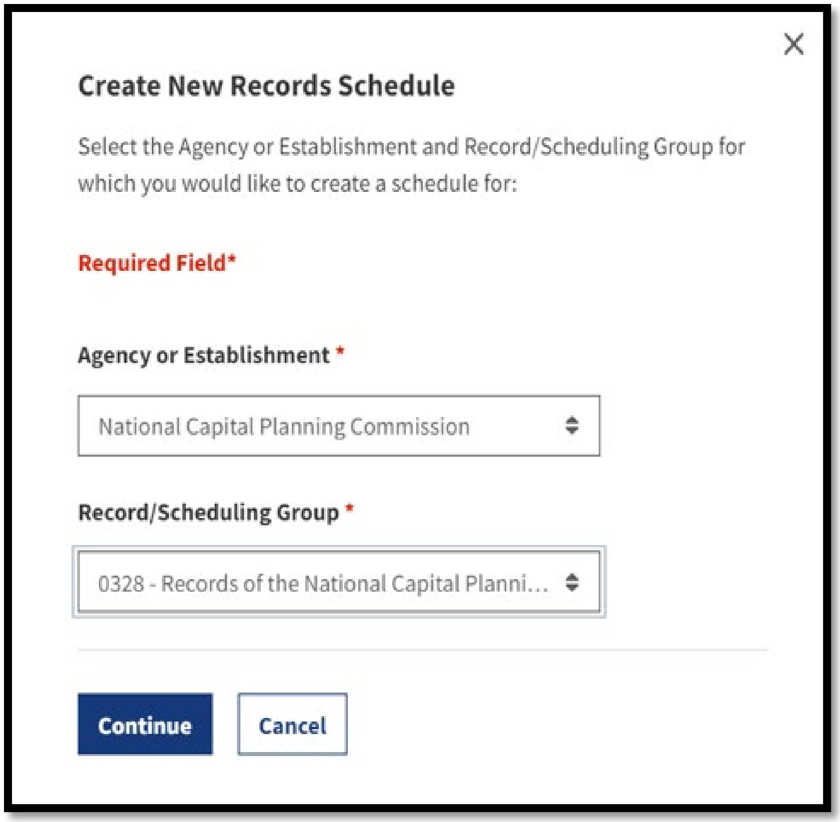

Figure 2: Create New Records Schedule Dialog Window

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

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

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.
- If you select either incorrectly, the records schedule will not be accepted by NARA and you must create a new Schedule. These two fields cannot be updated.

5. Select **Continue**. The Create Records Schedule page displays.

The form is now ready to populate with details for your Records Schedule. *See the next page for additional guidance on how to navigate the Records Schedule form type in ERA 2.0.*

About the Records Schedule Form in ERA 2.0

You will notice on the *Records Schedule* form that ERA 2.0 auto-generates a records schedule number for you. It also pulls over your Agency or Establishment information and sets your form to “Draft” status.

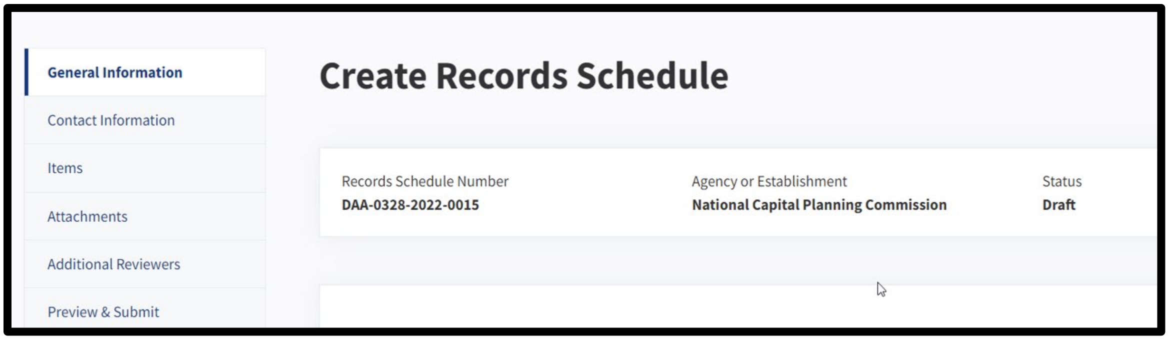

Figure 3: Create Records Schedule Page Headers

Also note, the *Records Schedule* form contains sub-sections that are accessible via the following tabs located on navigation menu on the left:

- **General Information:** Contains contextual information that applies to all **Items** in the records schedule (e.g., Name of Agency, Subject of Records Schedule, etc.).
- **Contact Information:** Provides contact information for the points of contact relating to the specific records schedule.
- **Items:** Contains a list of the records schedule **Items** and **Groups**.
- **Attachments:** Provides the option for agencies to attach supporting documentation related to the records schedule.
- **Additional Reviewers:** Provides the option

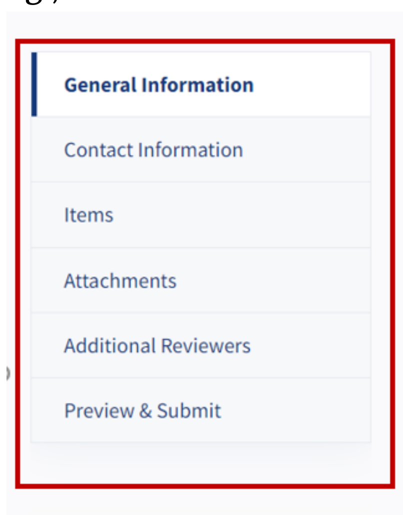

Figure 4: Records Schedule Form Navigation Menu

of requesting additional reviews on the schedule by users within the agency. *Note: This functionality will not be available at initial deployment and is outside of the current scope of this job aid.*

- **Preview & Submit:** Summarizes all input for the *Records Schedule* form, and provides action options (e.g., **Submit for Certification** or **Certify**) based on the user's role.

The above tabs outline the basic structure of the *Records Schedule* form. You will enter and update information on these tabs prior to submitting your records schedule. In-progress work may be saved until you are ready to submit your completed records schedule.

Dynamic menus in ERA 2.0: The main navigation menu on the left changes dynamically based on the options you select. For example, when selecting the **Items** menu option, the Items tab displays along with its own navigation menu. Use this menu to complete the details for each of the items to be included in your records schedule.

When selecting the **Create New Group** on the Items tab, the Create Group tab displays and only one option, (i.e., Create Group) displays in the navigation menu. You can always return to the main navigation menu by selecting the **Records Schedule Items** link in the upper left corner of the page.

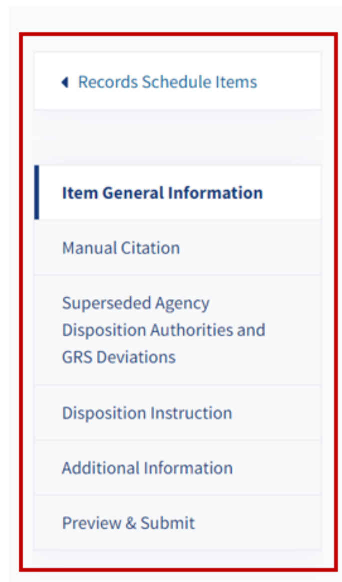

Figure 5: Items Navigation Menu

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.