Just-in-Time Instructions for: Review the History & Activity Log – Transfer Request

After submitting the Transfer Request for agency approval, the form is routed to the Approving Official(s). The Approving Official(s) will review the form and edit it as appropriate. The Approving Official(s) will then take actions to either propose the Transfer Request to NARA or return it to the initial requestor for additional action. For additional information, please review the support materials for the **Propose a Transfer Request** task available on the ERA 2.0 Training page.

To track the status of actions taken on the Transfer Request, review its History & Activity Log *which generally becomes available after the Transfer Request is no longer in "Draft" status.*

The History & Activity Log appears in the left navigation of the Transfer Request form after it has been submitted to the Approving Official. It provides an overview of each milestone, or action taken, on a given Transfer Request. In addition to reviewing the list of actions, you can access more detailed information regarding the specific milestones by selecting the Open "eye" icon that displays to the right of the milestone's header.
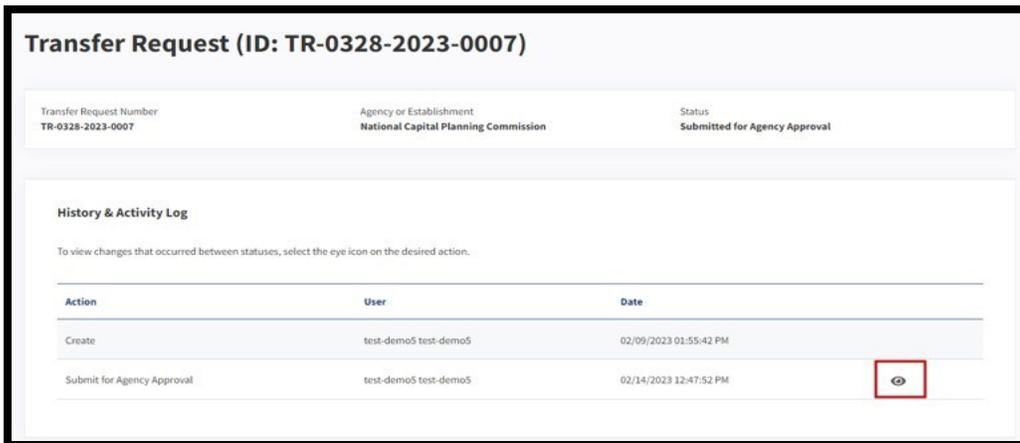
Figure 1: History & Activity Log

1. Select **History & Activity Log** from the navigation menu on the left. The <u>History & Activity Log</u> displays.

2. Verify the **status** of the Transfer Request is consistent with where you believe it should be within the Transferring workflow. By checking the status listed in the upper-left side of the log.

Figure 2: History & Activity Log Status Field

3. Review the **table entries** to confirm:

   a. Latest actions taken on the Transfer Request

   b. Users who have taken the actions

   c. Date (and time) during which each action was taken

4. Select **Open** (i.e., "eye" icon) to review details about specific milestones as well as activity at the more granular level if the available.

5. Select **Close** to return to the <u>History & Activity Log</u>.

END.

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