Using ERA for FRC Annual Move

(This is a webinar recording from October 20, 2015)

Slide 1: Introduction (0 – 2:11)

- Who We Are (Lynn Stewart and Tim Ennis)
- What we do
- What this Presentation is about: (2:11 – 4:30)
  - Transfer meanings
  - FRC – Archives; not transfer to FRC
  - What the Annual Move is (2:36 – 3:15)
  - More than one Annual Move going on at any given moment (3:02)
- Annual Move training at Archives.gov
- 5 brief videos on ERA
- Boot Camp video
- What We’ve Done: (4:32 – 6:45)
  - On 4/20/15 NARA loaded 12,207 TRs into ERA on behalf of the agencies
  - Not only 2016 but 2011, 2006, 2001, 1996 every 5 years
  - In addition 225 transfers that were more than 20 years overdue for transfers, part of a special project

Slide 2: 12,207 TR’s loaded on 10/1; 177,873.8 cu ft; 13 FRCs to 19 NARA Archival Units

Slide 3: Quick Reviews: FRC Transfers in ERA (6:42 – 8:42)

- Draft TR’s for eligible FRC Transfers
- Created by NARA from data derived from ARCIS
- One FRC ARCIS transfer = one ERA TR
- Agency responsible for reviewing and proposing TRs
- Corrected information must be provided to FRC’s and in ERA
- Every Agency has received advanced lists of the candidate FRC transfers for 2016

Slide 4: FRC Transfers in ERA – Sequence View (chart) (8:43 – 12:00)
Slide 5: Search for Annual Move TRs (12:44 – 14:40)
Slide 6: Search for TR’s in Draft Status (14:42 – 15:25)
Slide 7: Example of Search Results (15:31 – 17:50)
Slide 8: Search Results for Stratified Billing Customers (17:50 – 21:00)
Slide 9 - 13: Transfer Requests General Information Tab (21:00 – 44:40)
Slide 17: TR: GIT: Use Restrictions (48:21)
Slide 18: TR: GIT: Records Type (52:11 – 1:00:10)
Slide 19: TR: Transfer Details Tab (1:00:03 – 1:04)
Slide 20: TR: TDT: Transfer Method (1:04 – 1:07)
Slide 21: TR: TDT: List of Containers (1:07 – 1:10)
Slide 22: TR: TDT: Contact Information Tab (1:10 – 1:15:30)
Slide 23: TR: TDT: Contact Info Tab – Other Contacts (1:12:57)
Slide 24: TR: Signatory Information Tab (1:15:30 – 1:17:23)
Slide 25: TR: Related Assets Tab (1:17:23 – 1:18:39)
Slide 26: TR: Attachments Tab (1:18:38 – 1:23:30)
Slide 27: TR: Submit for Agency Approval (1:24:00 – 1:26:27)
Slide 28: TR: Propose TRs to NARA (1:26:28 – 1:27:30)
Slide 29: TR: Search for Submitted for Agency Approval (127:36 – 130:30)
Slide 30: TR: Submit to NARA (130:35)
Slide 32: TR: Use SAMO to Propose TRs (132:09 – 132:35) Single Action Multiple Objects – Agency Approving Official may submit for approval or reject multi TR’s

Slide 33: TR: Select TR’s for SAMO (132:35 – 137:05)

DATE REMINDER – (137:08 – 139:56) 12/1 agency needs to propose TR’s that we released on 10/1 to be considered for the January AMove

Slide 34: NARA Bulletin 2014-05 Guidance on NARA Created TR’s (139:56 – 143:50)

Slide 35: Annual Move Q – No questions (143:52 – 153:49)

Slide 36 – Slide 40: Contacts and Links (145:34 – 153:49)