

## Electronic Records Archives (ERA) Training Assistance Request

**Purpose of this form:** To better assist Federal agencies transition from paper based SF 115 and SF 258 operations to using ERA for electronic scheduling and transfers, NARA offers Training Assistance opportunities to selected Federal agencies. Training Assistance may include any of the following:

- onsite training at your agency
- email and/or telephone consultation

To be considered for Training Assistance, Federal agencies must first submit this Training Assistance Request. This form is designed to help NARA respond in a way that will most effectively address each agency's specific needs. Before you complete this form, be sure to communicate with your records management staff to identify and describe the issues NARA Training Assistance should address.

**Who should submit this form:** Agency Records Officers and/or ERA Account Managers should submit this form.

**How to submit this form:** After completing this form, save, attach to an e-mail and send to: ERATraining@nara.gov, or fax to: 301-837-0380.

**For additional guidance:** Refer to RM Communication AC 21.2013

### Section A: General - to be completed by all requesters:

Name:

Title:

Email:

Phone:

Parent Department or Agency Name:

Department/Bureau/Commission Name:

Complete Office Mail Address:

1. Please identify your agency's ERA Account Manager:
2. Please identify names of ERA account holders who will participate in the Training Assistance:

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

Name: Role(s):

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3. Please indicate the number of Training Assistance participants who have:
  - Completed online eLearning Lesson 1: Creating a Records Schedule
  - Completed online eLearning Lesson 2: Creating Records Schedule Items
  - Completed online eLearning Lesson 1: Creating a Transfer Request
  - Completed online eLearning Lesson 2: Submitting a Transfer Request to NARA
  - Participated in an ERA Boot Camp
  - Completed ERA online training modules relevant to their role(s)
  - Received briefings from NARA appraiser
  - Completed NARA's KA3 - Records Scheduling course
  - Completed NARA's KA4 - Records Schedule Implementation course
  - Active ERA accounts
4. If you have already used ERA, did you have difficulty with:
  - Navigating ERA
  - Obtaining ERA user accounts
  - Determining your IP addresses
  - Accessing ERA via the web
  - Other
5. Do you need assistance with:
  - Records Schedule only
  - Transfer Request only
  - Records Schedule and Transfer Request
  - Other ERA issues:
6. Does your agency have a computer lab or other dedicated training facility?
  - Yes            No
  - Other arrangements are available:

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## Section B: Records Schedule

7. Does your agency have complete Records Schedule data ready to enter into ERA during an ERA Training Assistance Workshop?

Yes                      No

If Yes, what type of draft schedule data and record format data do you have?

Big bucket or flexible schedule

E-system(s)

Textual records

Mixed formats

Other:

How many schedules and schedule items are proposed for submission?

Schedules:

Schedule Items:

If you have already used ERA to schedule records, did you have difficulty with:

Creating items and/or overviews

Entering multiple disposition instructions

Entering big bucket schedules

Revising a schedule

Tracking the status of your schedules

Other:

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### Section C – Transfer Request

8. Has your agency completed any Transfer Request work in ERA?

Yes

No

If Yes, please check all media types that apply:

Textual

Electronic

Photographs (Digital or Analog)

Architectural/engineering drawings

Film/Video (Digital or Analog)

Aerial Photographs

Audio (Digital or Analog)

Other

Maps

If you have already used ERA to transfer records, did you have difficulty with:

The Access and Use Restriction sections of the Transfer Request

Filling in pick list options (Access Restrictions, Current and Destination Location, Container Volume and Type)

Submitting Transfer Requests to NARA

Attaching documents to the Transfer Request

Reviewing and/or approving Transfer Requests generated by NARA for Federal Records Center transfers

Identifying the correct legacy schedule

Navigating the Transfer Request tabs and fields

Identifying status of Transfer Requests once submitted to NARA

Assigning Transfer Requests to agency staff

Understanding form content requirements

Other

## Electronic Records Archives (ERA) Training Assistance Request

Does your agency:

Store permanent records in Federal Records Centers (FRCs)?

Transfer permanent national security classified records to NARA?

Transfer permanent records to the Washington DC area?

Transfer permanent records to NARA regional archives?

If Yes, please list facilities or regions:

9. Do you currently need assistance with an ERA Transfer Request for:

Direct offers

Annual move

Both

Please provide contact information to discuss accessioning issues:

10. Do you have current direct transfers that need Transfer Requests generated and can be entered in ERA? If so, what media types? Check all that apply:

Textual

Electronic

Photographs (Digital or Analog)

Architectural/engineering drawings

Film/Video (Digital or Analog)

Aerial Photographs

Audio (Digital or Analog)

Other

Maps

Please provide a description to NARA's transfer staff. Example: Identify the series or record set, FRC transfer numbers (if applicable), media type, series title and description and disposition authorities (legacy SF-115 item#) for each transfer.