What is ERA?

The Electronic Records Archives (ERA) is the National Archives and Records Administration's (NARA) system that allows Federal agencies to perform critical records transactions with NARA online. ERA is designed to preserve and manage NARA's electronic records and to manage the lifecycle of records and other holdings, including support for records retention schedules and the accessioning process for all Federal records.

ERA does more than just store data. ERA provides a true digital archive that complies with all laws and regulations that apply to Federal, Presidential, and Congressional records. ERA also provides workflow support for many of the transactions that occur between NARA and its agency customers to process and preserve electronic records.

ERA also makes certain unstructured electronic records available to the public through the Online Public Access (OPA) tool. OPA is our prototype portal for searching multiple National Archives electronic resources at once.

Are agencies required to use ERA?

NARA Bulletin 2012-03, issued August 21, 2012 informed Federal agencies that, beginning October 1, 2012, NARA will use ERA for scheduling records and transferring permanent records to the National Archives. NARA will revise the Code of Federal Regulations and other publications regarding using ERA.

Are there any exceptions? See ERA FAQ #13 for exceptions to mandatory use of ERA: http://www.archives.gov/records-mgmt/era/faqs.html.

Who uses ERA and what does it do?

Federal agencies use NARA's ERA to:
- Perform records management transactions online.
- Draft new records retention schedules (SF 115s) for records in any format.
- Officially submit records retention schedules (SF 115s) for approval.
- Request the transfer of permanent records (SF 258s) in any format for accessioning or pre-accessioning.
- Submit electronic records for storage in the ERA electronic records repository.

NARA staff use ERA to:
- Review and approve or reject proposed record schedules.
- Review and approve or reject transfer requests that authorize an agency to transmit records to NARA.
- Review and approve or reject legal transfer Instruments.
- Create and submit a transfer request on behalf of the agency or a legacy migration transfer on behalf of NARA.
- Package legacy NARA electronic records, as well as other files received by NARA on behalf of an agency and send them to ERA.
- Ingest digital records.
- Document certain discrepancies; NARA Accessioning staff will document transfer discrepancies via the transfer processing results - which is visible to agencies but not editable.

Watch a You-Tube video of ERA in the process of accessioning records: http://www.youtube.com/watch?v=INXpaAXcCvk

How do agencies get started using ERA?

Getting started in ERA is a four step process, as illustrated below:
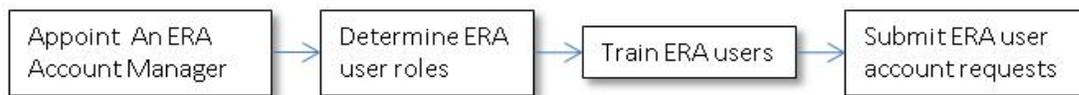
Step One – Appoint an ERA Account Manager

The ERA Account Manager is the person within an agency who approves user access to ERA. Frequently, the agency Records Officer serves as the ERA Account Manager. The agency Records Officer should email the name of the ERA Account Manager to: ERAaccounts@nara.gov.

Step Two - Determine ERA User Roles

ERA is a role-based system. Individuals approved to function in a particular role can access the screens needed to perform that function and take certain actions, such as submitting records schedule (SF 115) and transfer requests (SF135 and 258) information.. More than one person can be assigned multiple roles, and one person can be assigned many or all of the roles.

Permissions determine what functions ERA and NARA users can view and access. Agency users can access record schedules and transfer requests for their agency only. NARA users will have access to multiple agencies.

Roles for Scheduling Records
- Records Scheduler: This role should be assigned to users who will be preparing records schedules and submitting them to the Certifying Official for approval.

- Certifying Official: This role should be assigned to users who will be certifying that the agency is officially submitting records schedule information to NARA for approval. The paper equivalent of this role is the person who signs in Box 6 of the SF 115.

Roles for Transferring Permanent Records to NARA
- Transferring Official: This role should be assigned to users who will create transfer requests and submit them to the Transfer Approving Official for approval.

- Electronic Transfer Staff: For electronic records transfers only, this role should be assigned to users who will package and transmit electronic files to ERA via an electronic transfer method.

- Transfer Approving Official: This role should be assigned to users who have authority to approve transfer requests and legal transfer instruments on behalf of the agency. The paper equivalent of this role is the person who signs in Box 2A of the SF 258.

Step Three: Train ERA users.

Once the ERA Account Manager has identified the agency staff and their roles, the staff members must complete online training before they can obtain an ERA user ID and password.

Online training is available at: http://www.archives.gov/era/training/

Scheduling Records training contains two lessons:
- Lesson 1 - Creating a Records Schedule
- Lesson 2 - Creating Record Schedule Items

Transferring Records training contains six lessons:
- Lesson 1 – Creating a Transfer Request
- Lesson 2 - Submitting a Transfer Request to NARA
- Lesson 3 - Preparing Files for Transfer Using the Packaging Tool (Agency)
- Lesson 4 - Finalizing the Creation of a Package (Agency)
- Lesson 5 - Transferring Electronic Files into ERA via HTTPS
- Lesson 6 - Secure File Transfer Protocol

The ERA Agency User Manual and other support materials are located here: http://www.archives.gov/records-mgmt/era/

Step Four - Submit ERA User Account Requests

After training, staff members submit a request for a NARA user account by completing an online ERA User Account Request Form (NA 3070 - see link below). Staff should submit the form to the NARA Account representative who reviews the information and sends it via email to the agency ERA Account Manager. The ERA Account Manager approves the user account request by typing "approve" in the body of the email and sending it back to the NARA Account Representative. The ERA help desk will then contact the new user and arrange for a user ID and temporary password to be established for the user.

Link to ERA Account Request Form: **Error! Hyperlink reference not valid.** http://www.archives.gov/forms/era/era-account-request.html

How Does the Paper SF 258 Map to ERA Transfer Request (TR) fields?

To help users transition from paper forms to ERA, cross walk documents have been created to show how SF 258 fields correspond to ERA Transfer Request (TR) fields for:

- Textual Records
- Motion/Analog Records
- Stills/Digital Records
- Electronic Records

All cross walk documents are included in the ERA Agency User Manual Appendix. Individual cross walk documents can also be found here: http://www.archives.gov/records-mgmt/era/crosswalk.html

How is a legacy schedule added to ERA?

In order to create a transfer request in ERA, the user must select the disposition authority for the records. Not all currently approved disposition authorities have been entered into ERA. Records Management Services (ACNR) are implementing a project to systematically enter legacy disposition authorities into ERA. In the meantime, ACNR will enter legacy disposition authorities upon request. To request entry of a legacy disposition authority:

1. Send your request via email to: legacy.schedule@nara.gov. Your request must be a complete disposition authority citation (NARA SF 115 job number and item number). We will not accept manual citations.

2. You will receive a confirmation e-mail. The authority should be entered and available within two business days of receipt of the request. If you request more than 5 authorities in one day, NARA cannot guarantee the request will be fulfilled within 48 hours. If you need to request more than 5 authorities, please submit your request and we will give you an estimate on how long it will take to enter them in the system.
3. You will receive a message from legacy.schedule@nara.gov when the disposition authority is ready for use.

ERA Connectivity
ERA is accessed over the Internet. It works best using Firefox v3.6. [Any release] or Internet Explorer v7. There are technical issues that may prohibit other browsers from working effectively with ERA.

Users should contact ERAhelp@nara.gov with questions about browser compatibility.

NARA will need the range of Internet Protocol (IP) addresses each agency uses. Send questions to: ERAaccounts@nara.gov can provide additional information.

Link to ERA Log-On Page

The ERA log on screen for agency and NARA users is here: http://www.archives.gov/records-mgmt/era/

Help for All ERA Users – Agency and NARA

For technical ERA system issues like resetting of passwords, etc., all users should call the ERA Help Desk. Agency personnel who have questions about record schedules, transfer requests or other records management business processes should contact their agency's NARA representative.

- The ERA Help Desk can be reached from 6 AM to 8 PM EST at 1-877-372-9594
- The ERA Help Desk can be reached by e-mail. Send questions to ERAHelp@nara.gov

NARA Staff Only (non-Agency) training materials

- Online Training: NARA Staff ERA Training: Non-electronic Transfer
- ERA Internal User Manual - Textual Accessioning
- ERA Internal User Manual - Special Media Accessioning
- ERA Internal User Manual – Electronic Records

All the above manuals are located here: http://www.nara-at-work.gov/project_information/era/index.html