

# ERA 2.0 Agency Search Guide

June 2023, Cycle L



## Records Schedule

### Keyword Search

Keyword search is available from the Dashboard regardless of which “Tasks” navigation tab has been selected. The default search is across “All Fields,” but users may also select specific parts of the schedule, such as Schedule ID. In general, the Keyword search is best used for searches involving a single search term, a phrase, or a limited number of Schedule IDs.

*The figure above shows the keyword search options available from the Dashboard.*

The available fields include:

- **All Fields**
  - This option searches across all form fields for Records Schedules.
- **Schedule ID**
  - This option searches the Schedule ID.
- **Agency or Establishment**
  - This option searches by the name of the Agency or Establishment.
- **Schedule Subject**
  - This option searches the Schedule Subject.
- **Schedule Information**
  - This option searches the text entered in the Additional Information field of a Records Schedule.
- **Item Title**
  - This option searches by the Item Title.

### All Fields

“All Fields” is the only keyword search option that treats each word entered into the search box as a distinct term. If a user wants to search multiple words as a phrase, the words must be enclosed by quotation marks. For example:

- To search for Schedules submitted by Rural Development, search “Rural Development.”
- To search for a Schedule ID, such as DAA-0016-2022-0090, search “DAA-0016-2022-0090.”



*The figure above shows a search for specific records schedules using the “All Fields” search option.*

If a user wants to search for multiple terms, such as multiple schedules, the terms should be separated by spaces. For instance, in the screenshot above, a search for “DAA-0016-2022-0090” “DAA-0016-2022-0091” returned the two schedules with those Schedule IDs.

If a user entered Rural Development without quotation marks, the search would return Schedules containing the word Rural or the word Development.

### Schedule ID

Text entered in the “Schedule ID” box is searched as an exact phrase. Internal special characters are included, so multiple schedule IDs may be searched with a space in-between. For example, searching DAA-0016-2022-0090 DAA-0016-2022-0091, without quotation marks, will return both schedules.

RS-Schedule ID  × Advanced Search

## Search Results

Select Saved Search Select Action

### Record Schedule(s) (2)

Showing 1 - 2 of 2 matching results of DAA-0016-2022-0090 DAA-0016-2022-0091 in Record Schedule(s)

Schedule ID	Schedule Subject	Type	Agency or Establishment	Record/Scheduling Group	Schedule Status	
DAA-0016-2022-0091	Audits (Internal and External), Complaints, Investigations, OIG Investigations	Records Schedule	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Certified	
DAA-0016-2022-0090	Multi-family Housing	Records Schedule	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Approved	

*The figure above shows a search for two schedule IDs.*

## Agency or Establishment

Text entered into “Agency or Establishment” is searched as an exact phrase. To search for any agency containing the word Department, the keyword would require two wildcards (\*Department\*). The leading wildcard indicates that words may precede the search term, and the following wildcard indicates that words may come after the search term. Searching on Department\* would return results where Department is the first word in an Agency or Establishment name, and searching on \*Department would return results where Department is the last word.

RS Agency or Establishment  × Advanced Search

## Search Results

Select Saved Search Select Action

### Record Schedule(s) (205)

Showing 1 - 10 of 205 matching results of Rural Development in Record Schedule(s)

Schedule ID	Schedule Subject	Type	Agency or Establishment <sup>↑</sup>	Record/Scheduling Group	Schedule Status	
DAA-0016-2022-0011	STQ Test RS for Inactive Panel	Records Schedule	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Inactive	
DAA-0016-2022-0013	Records of the Field Offices	Records Schedule	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Approved	
DAL-0016-2022-0005	30262 DAL Created by Appraiser Updated	DAL	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Approved	
DAL-0016-2022-0007	News Files	DAL	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Approved	
DAA-0016-2022-0028	STQ Test 2 - No SHU Review	Records Schedule	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Returned Without Action	
DAA-0016-2022-0058	OIG Audits	Records Schedule	Rural Development	0016 - Records of the Office of the Secretary of Agriculture	Returned Without Action	

*The figure above shows a search on the phrase Rural Development.*

## Schedule Subject

Text entered into Schedule Subject is searched as an exact phrase. To search a single word as a keyword, use wildcards before and after the search term. In the example below, the term \*Housing\* has returned results with the word Housing anywhere in the Schedule Subject. A search on \*Housing would return schedules in which 'Housing' is the last word. A search on Housing\* would return schedules in which Housing is the first word. A search on Housing, without wildcards, would return only schedules with a one-word Schedule Subject (Housing).

## Search Results



*The figure above shows a keyword search of the Schedule Subject.*

## Schedule Information

Text entered into Schedule Information is searched as an exact phrase. To search a single word as a keyword, use wildcards before and after the search term. In the example below, the term \*Item\* has returned results with the word Item anywhere in the Schedule Information. A search on \*Item\* would return schedules in which 'Item' is the last word. A search on Item\* would return schedules in which Item is the first word.

## Search Results

Select Saved Search ▾ Select Action ▾

### Record Schedule(s) (4)

Showing 1 - 4 of 4 matching results of 'Item' in Record Schedule(s)

DAA-GRS-2022-0010	GENERAL RECORDS SCHEDULE 6.1: Email Managed under a Capstone Approach	Records Schedule	General Records Schedules (National Archives and Records Administration)	GRS - General Records Schedules	Approved		
DAL-0399-2022-0005	3-25-2022_Sprint 3J_BKM	DAL	Federal Railroad Administration	0399 - Records of the Federal Railroad Administration	Approved		

*The figure above shows a keyword search of Schedule Information.*

The Schedule Information field is called “Additional Schedule Information” and is found in the General Information section of the Records Schedule.

— General Information

<b>Agency or Establishment *</b>	General Records Schedules (National Archives and Records Administration)
<b>Record Group/Scheduling Group *</b>	GRS - General Records Schedules
<b>Records Schedule Applies to *</b>	Government-wide All agencies except:
<b>Schedule Subject *</b>	GENERAL RECORDS SCHEDULE 6.1: Email Managed under a Capstone Approach
<b>Additional Schedule Information</b>	<p>This schedule applies only to Federal agencies that implement a Capstone approach as described in this GRS. When implementing this GRS, agencies should consult the FAQs about GRS 6.1, Email Managed under a Capstone Approach. Agencies are reminded that this GRS should not be implemented in isolation, and should be supplemented with agency-wide policies and training, as well as incorporated into agency records management implementation tools, such as manuals and file plans. Agencies adopting a Capstone approach should also consult other resources available from NARA related to email management, specifically the Capstone approach. These resources are available on NARA's email management page and are summarized in the introduction to the FAQ. Agencies must not implement this GRS until obtaining approval of NARA form 1005 (NA-1005), Verification for Implementing GRS 6.1. Agencies are required to obtain approval of a resubmitted NARA form 1005 at least every four years. Additional information, including a link to the form, may be found in the FAQs and in the instructions accompanying the form. GRS Scope Email can be managed at an account level, at a mailbox level, in personal folder files, or other ways. This GRS applies to all email, regardless of how the email messages are managed or what email technology is used. Email, in the context of this GRS, also includes any associated attachments. This GRS may apply to records affiliated with other commonly available functions of email programs such as calendars/appointments, tasks, and chat. Each agency is responsible for determining the scope of implementation when using Capstone, including, 1) The range of implementation in an organization (agency-wide, specific office, etc.); and 2) The range of implementation regarding email technology and system platforms. Brief information on the scope of an agency's Capstone implementation is also required on NA-1005. Agencies are also responsible for defining (and documenting through policy) the official recordkeeping version of email to be managed under a Capstone approach, especially when email is captured or retained in multiple locations (e.g., an email archive vs. the live system). All other versions of email can be considered nonrecord, the retention of which should be addressed in agency email policy. Agencies are expected to apply documented selection criteria to cull the email of Capstone officials (permanent accounts) to the greatest extent possible before transfer to NARA. Culling refers to the removal – or otherwise excluding from capture – of nonrecord, personal, or transitory messages and attachments. Culling typically includes the removal of spam, email blasts received (such as agency-wide communications), and personal materials (such as emails to family members not related to agency business). Culling may be manual, automated, or a hybrid of both. Agencies may develop their own policies and procedures for the culling of temporary accounts. Applying this GRS When applying this GRS in part, agencies must ensure that all other email records are covered by another NARA-approved disposition authority. Agencies NOT managing any of their email under the Capstone approach are still responsible for managing their email by applying NARA-approved records schedules. If an agency is implementing a Capstone disposition approach different from what is provided in this GRS, the agency must submit a records schedule. For example, an agency may want to narrow the list of required positions in item 010, use shorter retention lengths for temporary records, or extend the time frame for transfer of permanent records. Agencies have discretion to designate individual email messages, with their attachments as permanent, or as longer-term temporary records that should be cross-filed elsewhere pursuant to agency policies and business needs. Agencies must transfer to NARA the emails of Capstone officials captured during their tenure as a Capstone official. Therefore, email of Capstone officials created prior to their designation as a Capstone official (e.g., prior to their promotion/rotation into a Capstone position) should be treated as temporary and not transferred to NARA. For guidance on transferring email as a permanent record, see NARA Bulletin 2014-04, Revised Format Guidance for the Transfer of Permanent Electronic Records and the relevant sections of 36 CFR Part 1235.</p>
<b>Is there a classified version of this schedule? *</b>	No

*The figure above shows the Additional Schedule Information field within a Records Schedule.*

### Item Title

Text entered into Item Title is searched as an exact phrase. To search a single word as a keyword, use wildcards before and after the search term. In the example below, the term \*Housing\* has returned results with the word Housing anywhere in the Item Title.

## Search Results

Select Saved Search  Select Action 

### Record Schedule(s) (1)

Showing 1 - 1 of 1 matching results of \*Housing\* in Record Schedule(s)

View 10  Items of 1

Previous 1 Next

*The figure above shows a search for \*Housing\* in the Item Title.*

Multiple words are searched as an exact phrase. In the example below, the phrase Rural Housing Improvement Grants, without quotation marks, returns a schedule that contains an Item with that title.

RS-Item Title  Rural Housing Improvement Grants X Advanced Search 

## Search Results

Select Saved Search  Select Action 

### Record Schedule(s) (1)

Showing 1 - 1 of 1 matching results of Rural Housing Improvement Grants in Record Schedule(s)

View 10  Items of 1

Previous 1 Next

*The figure above shows an Item Title search with the phrase Rural Housing Improvement Grants as the search term.*

### Advanced Search

The Advanced Search page contains options for refining a search. Wildcards (\*) do not work in Advanced Search fields.

Once search criteria have been selected, the ‘Clear All’ button at the upper right corner will become active. Clicking it will clear your choices and reset your search to the default Advanced Search page.

*The images above show the Advanced Search page before it is expanded to show additional search fields.*

The standard search page contains:

### Saved Search

The Saved Search allows users to populate the page with a previously saved search. The search may be selected from a drop-down list of available saved searches.

Display Search Results at the (Schedule or Item level)



This search field allows users to choose how results should be displayed. The search defaults to ‘Schedule Level.’

If the user chooses ‘Schedule Level,’ the search results page displays: Schedule ID, Schedule Subject, Type (of Schedule), Agency or Establishment, Record/Scheduling Group, and Schedule Status.

If the user chooses ‘Item Level,’ the search results page displays: Item ID, Item Title, Type (of Schedule), Agency or Establishment, Record/Scheduling Group, and Item Status.

### Record Schedule Number or Item ID

This search field allows users to search by Records Schedule Number or Item ID. The user may toggle between Records Schedule Number and Item ID. There is a text box into which a number may be entered.

Text entered into the search box is searched as an exact phrase, including any internal special characters (such as dashes). Multiple Records Schedule Numbers or Item IDs may be searched with commas between them. For example: DAA-0016-2022-0009, DAA-0016-2022-0010. As a reminder, wildcards (\*) do not work in this field. It will also not allow partial data – if you enter DAA-0016-2022 in an attempt to see all schedules from Fiscal Year 2022, you will not receive any hits.

If you wish to limit by Record Group or year, use the Record/Scheduling Group field or Date or Date Range field.

### Schedule Type

The Schedule Type search allows users to specify the type of Records Schedule that they wish to search: Records Schedule, Legacy Records Schedule, or NA-1005. This is a multi-select option and users may choose either or multiple types of schedule. Selecting no options will search across all Schedule Types.

### Schedule Action

The Schedule Action field allows users to select one or more actions that may be taken on a schedule. This field does not search the current status of the Records Schedule. When you select an action, the search will return all forms that have ever had that action taken. For instance, choosing ‘Return for Revision’ will return all Records Schedules that have been returned to the Agency for revision, including schedules that were later re-Certified and sent back to NARA.

To search for Records Schedules that are currently in a particular status, please use ‘Schedule Status’ instead.

## Schedule Subject

This field searches the Records Schedule Subject. It is a text box, and any text entered will be searched as an exact phrase. No quotation marks are needed. A search on a partial Schedule Subject will not return hits - your search terms must exactly match the entire Schedule Subject. To search multiple Schedule Subjects, separate the terms with a comma. For example: Administration Files, Water and Waste Program.

Wildcards (\*) do not work in this Advanced Search field. To search for Schedule Subjects containing a particular word, use the Keyword search 'Schedule Subject' option, which will allow wildcards.

## Additional Schedule Information

This field searches the Additional Schedule Information in a Records Schedule. It is a text box, and any text entered will be searched as an exact phrase. No quotation marks are needed. To search for multiple phrases, separate the terms with a comma.

The terms that you enter into the Additional Schedule Information field must be an exact, word-for-word match to the data entered into the Records Schedule. It is not possible to search for partial phrases or single words through Advanced Search, because wildcards (\*) do not work. To search for records containing particular words, use the Keyword search "Schedule Information" option, which will allow wildcards.

## Agency or Establishment

The Agency or Establishment field allows the user to select and search for schedules from a particular Agency or Establishment. The relevant organization may be selected from a dropdown list. To skip directly to an agency, you may type into the dropdown box and select the Agency/Establishment name from the display.

As an Agency user, an entry for the Agency/Establishment associated with your account will appear below the dropdown by default. You must click the checkbox in order to search within the agency.

## Item Title

This field searches the Item Title within a Schedule. It is a text box, and any text entered will be searched as an exact phrase. No quotation marks are needed. To search for multiple phrases, separate the terms with a comma.

Wildcards (\*) do not work in this Advanced Search field. To search for Item Titles containing a particular word, use the Keyword search 'Item Title' option, which will allow wildcards.

## Description

This field searches the Item Description in a Records Schedule. It is a text box, and any text entered will be searched as an exact phrase. No quotation marks are needed. To search for multiple phrases, separate the terms with a comma.

The terms that you enter into the Item Description field must be an exact, word-for-word match to the data entered into the Records Schedule. It is not possible to search for partial phrases or single words through Advanced Search, because wildcards (\*) do not work.

## GRS 6.1 Item Proposed for Use

This field searches the GRS 6.1 Item Proposed for Use field in an NA-1005. The options are Item 010, Item 011, and Item 012. The search options are multi-select, so more than one Item may be chosen.

## Date or Date Range

This field searches the Date or Date Range during which an action was taken on a Records Schedule. It may be used in conjunction with Schedule Action and User. The Date or Date Range contains two dates: From and To. They must be filled in as MM/DD/YYYY. To search for schedules from a particular fiscal year, search From 10/01/YYYY To 09/30/YYYY. To search for a particular date, search From that date To that date. For example, From 10/08/2022 To 10/08/2022 would search for any schedules that had a particular action taken on October 8, 2022.

## Record/Scheduling Group

This field allows the user to select and search within a particular Record/Scheduling Group. The relevant choice may be selected from a dropdown list. To skip directly to a Record/Scheduling Group, type into the dropdown box and select the correct group from the display.

As an Agency user, an entry for the Record Group associated with your account will appear below the dropdown. You must click the checkbox in order to search within the Group.

## User

The User field searches by the username of the individual who took a particular action on a Records Schedule. The format is First Name Last Name, with a space between. Multiple usernames may be separated by a comma. The user name must be entered exactly as it appears in

the History & Activity Log. For instance, if a person’s username in ERA 2.0 is ‘Jane Doe2,’ that is what should be entered into the search box.

Wildcards (\*) do not work in this Advanced Search field.

### Advanced Search: Expanded Search

Clicking on “View More” at the bottom of the Advanced Search page will display additional search options.

**Schedule Status**

- Draft
- Submitted for Certification
- Certified
- Returned for Revision
- Returned Without Action
- Appraiser Concurred
- Appraiser Team Concurred

**Tribal Consultation Needed**

- No - the records covered by this schedule do not implicate Tribal interests
- Yes - the records covered by this schedule do implicate Tribal interests
- Yes and completed - a consultation with Indian Tribal governments was conducted
- Exempt from requirement - Legislative Branch
- Exempt from requirement - Judicial Branch

**Other Settings**

Classified Version of Schedule

- Yes
- No

National Security Classified?

- Yes
- No

Media Neutral?

- Yes
- No

**Big Bucket?**

- Yes
- No

**Item Status**

- Draft
- Added
- Pending
- Active
- Inactive
- Returned Without Action

**Record Schedule Applies to**

- Agency Subdivision
- Agency-wide
- Department-wide
- Multi-agency
- Government-wide

**Other Codes and Numbers**

Agency Code

Superseded Item

GRS Deviation

Legal Citation

**Disposition Instruction**

- Temporary
- Permanent
- Disposition Not Approved

**FOIA Exemptions**

- FOIA (b)(1) National Security
- FOIA (b)(2) Internal Personnel Rules and Practices
- FOIA (b)(3) Statute
- FOIA (b)(4) Trade Secrets and Commercial or Financial Information
- FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
- FOIA (b)(5) Personal Information

**Search** Cancel **View Less**

The figure above shows the ‘View More’ expanded portion of the Advanced Search page.

### Schedule Status

Users may search by the current status of the schedule: Draft, Submitted for Certification, Certified, Returned for Revision, Returned Without Action, Appraiser Concurred, Appraiser

Team Concurred, Manager Concurred, Chief Records Officer Concurred, Approved, Inactive, and Submitted for Approval. This search is multi-select, so the user may choose multiple schedule statuses. This search will return all Records Schedules that are currently in a particular status.

### Tribal Consultation Needed

This field allows users to search by the answer to the “Tribal Consultation Needed?” question. It is a multi-select, so users may choose multiple answers. The options are:

No - the records covered by this schedule do not implicate Tribal interests  
Yes - the records covered by this schedule do implicate Tribal interests  
Yes and completed - a consultation with Indian Tribal governments was conducted  
Exempt from Requirement - Legislative Branch  
Exempt from Requirement - Judicial Branch  
Exempt from Requirement - Independent Regulatory Agency

### Classified Version of Schedule

This field searches the question “is there a classified version of this schedule?” Users may choose ‘yes’ or ‘no.’

*A note on Yes/No options:* once a user has chosen yes or no, they may change their decision but may not unselect. To clear this section of the form, choose ‘Clear All’ or refresh your browser and all information in the Advanced Search should reset.

### National Security Classified?

This field searches the “National Security Classified Version of Dossier Exists?” question on the National Security Classified tab. Please note: this tab is only visible to NARA users. Agency users may search on this question, but will not be able to see where the data appears in the schedule. Users may choose ‘yes’ or ‘no.’

### Media Neutral?

This field searches the “Media Neutral?” question found in Records Schedule Items. Users may choose ‘yes’ or ‘no.’

### Big Bucket?

This field searches the “Big Bucket?” question found in Records Schedule Items. Users may choose ‘yes’ or ‘no.’

## Item Status

This field allows the user to search by the current status of the Items on a schedule. It is a multi-select with the following options: Draft, Added, Pending, Active, Inactive, and Returned Without Action.

## Record Schedule Applies To

This field allows the user to search by the answer to the “Record Schedule Applies To” question. It is a multi-select with the following options: Agency Subdivision, Agency-wide, Department-wide, Multi-agency, and Government-wide.

## Supersedes Existing Item?

This field allows the user to search for items that either supersede or do not supersede existing items. The choices are ‘yes’ or ‘no.’

## A GRS Deviation?

This field allows the user to search for items that either deviate or do not deviate from the GRS. The choices are ‘yes’ or ‘no.’

## Agency Code

This field allows users to enter keywords to search for the Agency Code. As with other Advanced Search fields, this search treats all keywords as exact phrases. No quotation marks are necessary. The search terms must match the data in the Records Schedule exactly, or no results will be returned. This field will not accept wildcards (\*). To search multiple Agency Codes, enter words or phrases separated by commas.

## Superseded Item

This field allows users to enter keywords to search for the Superseded Item number(s). As with other Advanced Search fields, this search treats all keywords as exact phrases. No quotation marks are necessary. The search terms must match the data in the Records Schedule exactly, or no results will be returned. This field will not accept wildcards (\*). To search multiple Superseded Items, enter words or phrases separated by commas.

## GRS Deviation

This field allows users to enter keywords to search for the GRS Deviation number(s). As with other Advanced Search fields, this search treats all keywords as exact phrases. No quotation marks are necessary. The search terms must match the data in the Records Schedule exactly, or no results will be returned. This field will not accept wildcards (\*). To search multiple GRS Deviations, enter words or phrases separated by commas.

## Legal Citation

This field allows users to enter keywords to search for the Legal Citation(s). As with other Advanced Search fields, this search treats all keywords as exact phrases. No quotation marks are necessary. The search terms must match the data in the Records Schedule exactly, or no results will be returned. This field will not accept wildcards (\*). To search multiple Legal Citations, enter words or phrases separated by commas.

## Disposition Instruction

This field is a multi-select that allows a search by Item Disposition Instruction. The options are: Temporary, Permanent, Disposition Not Approved.

## FOIA Exemptions

This search allows users to choose FOIA Exemptions from a multi-select list, and limit to schedules with items covered by the chosen exemptions.

## Transfer Request

### Keyword Search

Keyword search is available from the Dashboard regardless of which tab has been selected. The default search is across “All Fields,” but users may also select specific parts of the schedule, such as Schedule ID. In general, the Keyword search is best used for searches involving a single search term, a phrase, or a limited number of Schedule IDs.

*The figure above shows the Transfer Requests keyword search menu.*

## All Fields

“All Fields” is the only keyword search option that treats each word entered into the search box as a distinct term. If a user wants to search multiple words as a phrase, the words must be enclosed by quotation marks. For example:

- To search for Transfer Requests submitted by Rural Development, search “Rural Development.”
- To search for a Transfer Request Number, such as TR-0016-2022-0032, search “TR-0016-2022-0032.”

To search for multiple phrases, use quotation marks and separate each phrase by a space.

## Search Results

Select Saved Search  Select Action 

### Transfer Request(s) (2)

Showing 1 - 2 of 2 matching results of "TR-0016-2022-0007" "TR-0016-2022-0008" in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office	
TR-0016-2022-0007	Direct Offer	Custody Accepted	Public Relations Files	FW001	DAA-0016-2022-0006-0001	National Archives at Fort Worth	Public Relations	 
TR-0016-2022-0008	Direct Offer	Custody Accepted	Public Relations Files		DAA-0016-2022-0006-0001	National Archives at Fort Worth		 

*The figure above shows the results for an “All Fields” search on the terms “TR-0016-2022-0007” “TR-0016-2022-0008.” Two Transfer Requests have been returned.*

## Transfer Request Number

Text entered in the “Transfer Request Number” box is searched as an exact phrase. Quotation marks are not necessary. Internal special characters are included, so multiple request IDs may be searched with a space in-between. For example, searching TR-0016-2022-0007 TR-0016-2022-0008, without quotation marks, will return both Transfer Requests.



### Transfer Request(s) (2)

Showing 1 - 2 of 2 matching results of TR-0016-2022-0007 TR-0016-2022-0008 in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office	
TR-0016-2022-0007	Direct Offer	Custody Accepted	Public Relations Files	FW001	DAA-0016-2022-0006-0001	National Archives at Fort Worth	Public Relations	 
TR-0016-2022-0008	Direct Offer	Custody Accepted	Public Relations Files		DAA-0016-2022-0006-0001	National Archives at Fort Worth		 

View  Items of 2

[Previous](#) [1](#) [Next](#)

*The figure above shows the results for a “Transfer Request Number” search on the terms TR-0016-2022-0007 TR-0016-2022-0008. Two Transfer Requests have been returned.*

### Creating Office

Text entered in the “Creating Office” box is searched as an exact phrase. Quotation marks are not necessary. The search will match against content in the “Creating Office” field in the “General Information” section of a Transfer Request.

This is not the same as searching against “Agency or Establishment.” To search Transfer Requests from a particular Agency, please conduct an advanced search.

This search will accept wildcards. The term \*Public\*, with wildcards at the beginning and end, would search for ‘Outreach and Public Affairs’ or ‘Public Relations.’ Leading wildcards (\*Public) would search for Offices with ‘Public’ as the last word. Ending wildcards (Public\*) would search for Offices with ‘Public’ as the first word.

TR-Creating Office

### Search Results

Select Saved Search

Select Action

### Transfer Request(s) (1)

Showing 1 - 1 of 1 matching results of Rural Development in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office	
TR-0016-2022-0003	Direct Offer	Rejected	Project Subject Files	00001Rural	DAA-0016-2022-0005-0001	National Archives at Fort Worth	Rural Development	 

*The figure above shows a search for Rural Development as the Creating Office.*

## Accession Title

Text entered in the “Accession Title” box will search as an exact phrase. For example, entering Public Relations Files without quotation marks will search for all Transfer Requests with an Accession Title that exactly matches the keyword phrase. To search for all Transfer Requests that contain a particular word in their Accession Title, wildcards may be used. \*Public\* will search for any Transfer Request with the word ‘Public’ anywhere in the Accession Title. Public\* will search for Accession Titles that begin with the word ‘Public.’ \*Public will search for Accession Titles that end with the word ‘Public.’

## Search Results

Select Saved Search  Select Action 

### Transfer Request(s) (11)

Showing 1 - 10 of 11 matching results of 'Public' in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office
TR-0016-2022-0009	Direct Offer	Rejected	Public Relations Files		DAA-0016-2022-0006-0001	National Archives at Fort Worth	 
TR-0016-2022-0023	Direct Offer	Custody Accepted	Public Relations Files		DAA-0016-2022-0006-0001	National Archives at Fort Worth	 

*The figure above shows a search for accession titles containing the word ‘Public.’*

## Tracking Number

Text entered in the “Tracking Number” box will search as an exact phrase. For example, entering FW001 without quotation marks will search for all Transfer Requests with a Tracking Number that exactly matches the keyword phrase.

To search for any Transfer Request that contains a partial tracking number, use wildcards either before, after, or on both sides of the partial number. For example, \*FW\* will search for any Tracking Number containing ‘FW’ somewhere in the number.

## Search Results

Select Saved Search Select Action

### Transfer Request(s) (1)

Showing 1 - 1 of 1 matching results of 00001Rural in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office	
TR-0016-2022-0003	Direct Offer	Rejected	Project Subject Files	00001Rural	DAA-0016-2022-0005-0001	National Archives at Fort Worth	Rural Development	

The figure above shows a search of the Tracking Number field.

## Privacy Act Citation

Text entered in the “Privacy Act Citation” box will search as an exact phrase. For example, entering 71 FR 142 without quotation marks will search for all Transfer Requests with a Privacy Act Citation that exactly matches the keyword phrase.

To search for any Privacy Act Citation that contains a partial citation, use wildcards either before, after, or on both sides of the partial citation. For example, \*FR\* will search for any Privacy Act Citation containing ‘FR’ somewhere in the citation.

### Transfer Request(s) (1)

Showing 1 - 1 of 1 matching results of \*FR\* in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office	
TR-0016-2023-0005	Direct Offer	Custody Accepted	Director's Correspondence Files		DAA-0016-2022-0008-0001	National Archives at Fort Worth	Rural Development	

View 10 Items of 1

Previous 1 Next

The figure above shows a search for \*FR\* in the Privacy Act Citation field.

## Access Restriction Note

This field searches the Restriction Note in the Access Restrictions section of the Transfer Request. Text entered in the search box will be searched as an exact phrase. To search for all Transfer Requests that contain a particular word in the Access Restriction Note, use wildcards.

For example, a search for \*privacy\* would search for Access Restriction Notes that contain the word ‘privacy’ anywhere in the note. A wildcard before the search term will return Access

Restriction Notes that end in the search term. A wildcard after the term will return Access Restriction Notes that begin with the term.

## Search Results

Select Saved Search

Select Action

### Transfer Request(s) (1)

Showing 1 - 1 of 1 matching results of \*privacy\* in Transfer Request(s)

View 10 Items of 1

Previous 1 Next

*The figure above shows an “Access Restriction Note” search on the term \*privacy\*.*

## Agency Name and Address

This field searches the Agency Name and Address in the Location section of the Transfer Request. Text entered in the search box will be searched as an exact phrase. To search for all Transfer Requests that contain a particular word in the Agency Name and Address, use wildcards.

The wildcard search can only be run with a single word. To search for the Peace Corps, a user could search on \*Peace\* or \*Corps\* to return results. A search on Peace\* would return any Transfer Requests with ‘Peace’ as the first word in the Agency Name and Address. A search on \*Corps would return any Transfer Requests with ‘Corps’ as the last word in the Agency Name and Address.

## Search Results

Select Saved Search

Select Action

### Transfer Request(s) (1)

Showing 1 - 1 of 1 matching results of \*Peace\* in Transfer Request(s)

Transfer Request Number	Type of Legal Transfer	Status	Accession Title	Tracking Number	Disposition Authority	Destination Custodial Unit	Creating Office
TR-0490-2022-0037	Direct Offer	Custody Accepted	Anniversary Celebration Records	00001	DAA-0490-2022-0009-0001	National Archives at Washington, DC	Office of the Director

View 10 Items of 1

Previous 1 Next

*The figure above shows a search of ‘Agency Name and Address’ with the search term \*Peace\*.*

## Advanced Search

The Advanced Search page contains options for refining a search. Wildcards (\*) do not work in Advanced Search fields.

Records Schedules | Transfer Requests

- Select Saved Search -

Search Cancel Clear All

**Transfer Request Number**  
Enter Transfer Request Number(s)

**Creating Office**  
Enter Creating Office

**Type of Legal Transfer**  
 Annual FRC Move  
 Direct Offer  
 Pre-Accession

**Current Federal Records Center**  
 FRC - Atlanta  
 FRC - Boston  
 FRC - Chicago  
 FRC - Dayton  
 FRC - Denver  
 FRC - Fort Worth  
 FRC - Kansas City

**Transfer Request Action**  
 Create  
 Submit for Agency Approval  
 Propose  
 Approve  
 Return  
 Accept Physical Custody  
 Accept Legal Custody

**Status**  
 Submitted for Agency Approval  
 Proposed  
 Approved  
 Returned  
 Rejected  
 Draft  
 Custody Accepted

**Record Group**  
- Search Record Group -

**Destination Custodial Unit**  
 National Archives at College Park - Cartographic Records Branch  
 National Archives at College Park - Electronic Records Division  
 National Archives at College Park - Motion Pictures Branch  
 National Archives at College Park - Still Pictures Branch  
 National Archives at College Park - Textual Records Division  
 National Archives at Washington, DC  
 National Archives at Atlanta

**Agency or Establishment**  
- Select Agency or Establishment -

**Date or Date Range**  
From  
Month Day Year  
Month(MM) Day(DD) Year(YYYY)  
To  
Month Day Year  
Month(MM) Day(DD) Year(YYYY)

**User**  
Enter User First Name and Last Name

Search Cancel Clear All View More

The figure above shows the Advanced Search page, without 'View More' selected to expand the additional fields.

The unexpanded advanced search page contains:

## Saved Search

The Saved Search allows users to populate the page with a previously saved search. The search may be selected from a drop-down list of available saved searches.

## Transfer Request Number

This search field allows users to search by Transfer Request Number. There is a text box into which a number may be entered.

Text entered into the search box is searched as an exact phrase, including any internal special characters (such as dashes). Multiple Transfer Request Numbers may be searched with commas between them. For example: TR-0016-2022-0019, TR-0016-2022-0020. As a reminder, wildcards (\*) do not work in this field. It will also not allow partial data – if you enter TR-0016-2022 in an attempt to see all transfer requests from Fiscal Year 2022, you will not receive any hits.

If you wish to limit by Record Group or year, use the ‘Record Group’ field or ‘Date or Date Range’ field.

### Creating Office

Text entered in the “Creating Office” box is searched as an exact phrase. Quotation marks are not necessary. You may not search multiple Creating Offices, even if you space them with commas. Wildcards (\*) will not work; to search with wildcards, use the Keyword Search option for “Creating Office.”

The search will match against content in the “Creating Office” field in the “General Information” section of a Transfer Request. This is not the same as searching against “Agency or Establishment.” To search Transfer Requests from a particular Agency, please search ‘Agency or Establishment,’ as described below.

### Type of Legal Transfer

This field searches the three types of legal transfer: Annual FRC Move, Direct Offer, or Pre-Accession. The boxes are multi-select, so a user can choose multiple types of legal transfer.

### Current Federal Records Center

This field searches the current Federal Records Center at which the records are located. This data is entered for Annual FRC Move Transfer Requests. The boxes are multi-select, so a user can choose multiple options for Current Federal Records Center.

### Transfer Request Action

The Transfer Request Action field allows users to select one or more actions that may be taken on a request. This field does not search the current status of the Transfer Request. When you select an action, the search will return all forms that have ever had that action taken. For instance, choosing ‘Return’ will display all Transfer Requests that have been returned to the Agency by NARA, even if they were re-submitted and later Approved.

To search for Transfer Requests that are currently in a particular status, please use ‘Status’ instead.

## Status

Users may search by the current status of the Transfer Request: Submitted for Agency Approval, Proposed, Approved, Returned, Rejected, Draft, Custody Accepted, Custody Rejected, Physical Custody Accepted, Physical Custody Rejected. This search is multi-select, so the user may choose multiple schedule statuses. This search will return all Transfer Requests that are currently in a particular status.

## Record Group

This field allows the user to select and search within a particular Record Group. The relevant choice may be selected from a dropdown list. To skip directly to a specific Record Group, you may type into the dropdown box and select the correct group from the display.

As an Agency user, the Record Group associated with your account will appear below the dropdown by default. You must click the checkbox in order to search within the Group.

## Date or Date Range

This field searches the Date or Date Range during which an action was taken on a Transfer Request. It may be used in conjunction with Transfer Request Action and User. The Date or Date Range contains two dates: From and To. They must be filled in as MM/DD/YYYY. To search for requests from a particular fiscal year, search From 10/01/YYYY To 09/30/YYYY. To search for a particular date, search From that date To that date. For example, From 10/08/2022 To 10/08/2022 would search for any Transfer Requests that had a particular action taken on October 8, 2022.

## Destination Custodial Unit

This field searches the Custodial Unit to which the records are being transferred. The field is multi-select, so the user may choose more than one Destination Custodial Unit.

### Agency or Establishment

The Agency or Establishment field allows the user to select and search for schedules from a particular Agency or Establishment. The relevant organization may be selected from a dropdown list. To skip directly to an agency, you may type into the dropdown box and select the Agency/Establishment name from the display.

As an Agency user, an entry for the Agency/Establishment associated with your account will appear below the dropdown. You must click the checkbox in order to search within the agency.

## User

The User field searches by the username of the individual who took a particular action on a Transfer Request. The format is First Name Last Name, with a space between. Multiple usernames may be separated by a comma. The user name must be entered exactly as it appears in the History & Activity Log. For instance, if a person's username in ERA 2.0 is 'Jane Doe2,' that is what should be entered into the search box.

Wildcards (\*) do not work in this Advanced Search field.

## Advanced Search: Expanded Fields

### Disposition Authority

The Disposition Authority field allows the user to search for the Disposition Authority being used in the Transfer Request. The terms are searched as an exact phrase. To search for multiple disposition authorities, separate the terms by a comma. For example: DAA-0016-2022-0006-0001, DAA-0016-2022-0007-0001. Wildcards (\*) do not work in this field.

### Access Restriction Status

This field searches the access restriction status of the records in the Transfer Request. The options are: Unrestricted, Restricted - Partly, and Restricted - Fully. The field is multi-select, so users may choose more than one option.

### Security Classification

This field searches the security classification of the records being transferred. The options are: Confidential, Secret, Top Secret, and Restricted Data/Formerly Restricted Data. This field is multi-select, so users may choose more than one option.

### General Records Type

The General Records Type field searches the type of records being transferred to NARA. Options include: Architectural and Engineering Drawings, Artifacts, Data Files, Maps and Charts, Moving Images, Photographs and other Graphic Materials, Sound Recordings, Textual Records, and Web Pages. This field is multi-select, so users may choose more than one option.

### Subject to the Privacy Act?

This is a yes/no question. Once an option has been selected, the choice can be changed but cannot be deselected. To clear the search, the user must choose 'Clear All' or refresh their browser webpage.

### Specific Access Restriction



This field searches a list of access restrictions, such as FOIA restrictions. It is multi-select, so users may choose more than one restriction.

## Special Markings

This field searches for any special markings that are related to the Transfer Request. Options include NATO, Roger Channel, Sensitive Compartmentalized Information (SCI), Special Access Program (SAP), or Other. It is multi-select, so users may choose more than one restriction.

## Example Searches

### Records Schedule

#### Search Schedules by Status

To search for Records Schedules that are in a particular status, use the “Schedule Status” field in the extended Advanced Search options.

**Schedule Status**

- Draft
- Submitted for Certification
- Certified
- Returned for Revision
- Returned Without Action
- Appraiser Concurred
- Appraiser Team Concurred

**Tribal Consultation Needed**

- No - the records covered by this schedule do not implicate Tribal interests
- Yes - the records covered by this schedule do implicate Tribal interests
- Yes and completed - a consultation with Indian Tribal governments was conducted
- Exempt from requirement - Legislative Branch
- Exempt from requirement - Judicial Branch
- Exempt from requirement - Independent Regulatory Agency

**Item Status**

- Draft
- Added
- Pending
- Active
- Inactive
- Returned Without Action

**Record Schedule Applies to**

- Agency Subdivision
- Agency-wide
- Department-wide
- Multi-agency
- Government-wide

**Other Codes and Numbers**

Agency Code

Superseded Item

GRS Deviation

Legal Citation

*The figure above shows the “Schedule Status” field, with “Draft,” “Submitted for Certification,” and “Returned for Revision” selected.*

For example, to identify all Records Schedules that are still pending with the Agency, select “Draft,” “Submitted for Certification,” and “Returned for Revision.” To see the schedules that are in Draft status only, select “Draft.”

This field is a multi-select, so multiple options may be selected. The system will treat multiple choices as an OR - for example, Draft OR Submitted for Certification OR Returned for Revision.

## Search Schedules by Agency or Establishment

To find Records Schedules for a specific Agency, choose an option from the 'Agency or Establishment' field. As an Agency user, the agencies assigned to your account will be displayed below the drop-down by default. If you want to select your own Agency, click the check box next to the Agency name.

The screenshot displays the 'Advanced Search' interface. At the top left is a dropdown menu for '- Select Saved Search -'. Below it are radio buttons for 'Display Search Results at the:' with 'Schedule Level' selected. A section for 'Record Schedule Number or Item ID' contains two tabs, 'Record Schedule Number' and 'Item ID', and an input field for 'Enter Schedule Number'. Under 'Schedule Type', there are three checkboxes: 'Records Schedule', 'Legacy Records Schedule', and 'NA: 1005'. The central 'Agency or Establishment' section is highlighted with a red box; it includes a dropdown menu for '- Select Agency or Establishment -' and a checked checkbox for 'Rural Development'. Below this are input fields for 'Item Title' and 'Description'. At the bottom, there is a section for 'GRS 6.1 Item Proposed for Use' with three checkboxes: 'Item 010', 'Item 011', and 'Item 012'. On the right side, there is a 'Record/Scheduling Group' dropdown menu and a checkbox for '0016 - Records of the Office of the Secretary of Agriculture'. At the top right are buttons for 'Search', 'Cancel', and 'Clear All'.

*The figure above shows the Advanced Search page with 'Agency or Establishment' inside a red box.*

To see a different Agency, choose an option from the drop-down list. The selected Agency name should appear beneath the drop-down. Click the check box to select it.

## Search Schedules by User, Fiscal Year, and Action

To search for Records Schedules that had an action taken upon them by a particular user and/or within a date range, use a combination of the 'Schedule Action,' 'Date or Date Range,' and 'User' fields.

The fields are all related, but are independent of each other. For example, a search only on 'User' will return any schedule upon which that user took an action. If the search includes only 'Date or Date Range,' the results will contain schedules that had an action taken within the specified date range. 'Schedule Action' will return any schedules that have ever had a particular action taken upon them.

Combining the search fields (such as Schedule Action and Date Range) will run a search narrowed to include both search criteria.

For example, to see the Records Schedules that were created in FY 2022, run the following search:

Schedule Action: Create

Date or Date Range: From 10/01/2021 To 09/30/2022

The screenshot shows three search criteria sections:

- Schedule Action:** A list of checkboxes with 'Create' and 'Submit for Certification' selected.
- Date or Date Range:** Two date pickers. The 'From' date is 10/01/2021 and the 'To' date is 09/30/2022.
- User:** A text input field with the placeholder text 'Enter User First Name and Last Name'.

*The figure above shows the ‘Schedule Action,’ ‘Date or Date Range’ and ‘User’ fields.*

If you want to limit by a particular user - for instance, to see everything that a particular Records Scheduler either Created or Submitted for Certification in a fiscal year - search by ‘Schedule Action,’ ‘Date or Date Range,’ and ‘User.’

Schedule Action: Create, Submit for Certification

Date or Date Range: From 10/01/2021 To 09/30/2022

User: Enter the ERA 2.0 username in First Name Last Name format. To search multiple users, enter a comma between names. For example: Jane Smith, John Smith.

This screenshot is similar to the first one, but the 'User' field now contains the text 'Jane Smith'.

*The figure above shows the ‘Schedule Action,’ ‘Date or Date Range,’ and ‘User’ fields.*

Please note that the results will not necessarily be in the status that matches the Schedule Action. In the example, the schedules that were Returned for Revision may have been re-Certified and returned to NARA. To see Records Schedules that are currently in a particular status, please see the search described below in ‘Schedules by Schedule Status.’

### *Narrow Search by Schedule Status*

To search for Records Schedules that are in a particular status and were acted upon in a time period by a specific user, add the ‘Schedule Status’ field to the search described above.

For example, to search for schedules that were Certified by a Certifying Official in FY 2022, but are still pending with NARA (in other words, Records Schedules that have not been Approved or Returned), enter the following criteria:

Schedule Action: Certified

Date or Date Range: From 10/01/2021 To 09/30/2022

User: Enter the ERA 2.0 username in First Name Last Name format. To search multiple users, enter a comma between names. For example: Jane Smith, John Smith.

Schedule Status: Select Certified, Appraiser Concurred, Appraiser Team Concurred, Manager Concurred, and Chief Records Officer Concurred.

Additional Schedule Information

Enter Additional Schedule Information

**Schedule Status**

- Certified
- Returned for Revision
- Returned Without Action
- Appraiser Concurred
- Appraiser Team Concurred
- Manager Concurred
- Chief Records Officer Concurred

**Item Status**

- Draft
- Added
- Pending
- Active
- Inactive
- Returned Without Action

**Other Codes and Numbers**

Agency Code

Enter Agency Code(s)

Superseded Item

Enter Superseded Item Number(s)

GRS Deviation

*The figure above shows the 'Narrow by Schedule Status' sample search.*

## Transfer Requests

### Transfer Requests by Status

To view Transfer Requests from an Agency that are in a particular status, choose the Agency name from 'Agency or Establishment' and a status from the 'Status' field.

**Status**

- Submitted for Agency Approval
- Proposed
- Approved
- Returned
- Rejected
- Draft
- Custody Accepted

**Destination Custodial Unit**

- National Archives at College Park - Cartographic Records Branch
- National Archives at College Park - Electronic Records Division
- National Archives at College Park - Motion Pictures Branch
- National Archives at College Park - Still Pictures Branch
- National Archives at College Park - Textual Records Division
- National Archives at Washington, DC
- National Archives at Atlanta

**Record Group**

- Search Record Group -

- 0016 - Records of the Office of the Secretary of Agriculture

**Agency or Establishment**

- Select Agency or Establishment -

- Rural Development

*The figure above shows the 'Status' and 'Agency or Establishment' fields.*

For example, to search for all Transfer Requests that are still in Proposed status for Rural Development, run the following search:

Status: Proposed

Agency or Establishment: Rural Development

To see Transfer Requests that were Proposed by an Agency in Fiscal Year 2022, and are still in Proposed status, add 'Transfer Request Action' and 'Date or Date Range' to the search:

Status: Proposed

Agency or Establishment: Rural Development

Transfer Request Action: Propose

Date or Date Range: From 10/01/2021 To 09/30/2022

The screenshot shows a search interface with several fields highlighted in red boxes. The highlighted fields are: Status (Proposed), Agency or Establishment (Rural Development), Transfer Request Action (Propose), and Date or Date Range (From 10/01/2021 To 09/30/2022). Other visible fields include Transfer Request Number, Creating Office, Type of Legal Transfer, Current Federal Records Center, Destination Custodial Unit, Record Group, and User.

*The figure above shows the 'Status,' 'Agency or Establishment,' 'Transfer Request Action,' and 'Date or Date Range' fields.*

### Requests by Person, Date, Action

To search for Transfer Requests that were acted upon by a specific user within a date range, search on the 'Transfer Request Action,' 'Date or Date Range,' and 'User' fields.

For example, to see all Transfer Requests that were created by a Records Scheduler in Fiscal Year 2022, run the following search:

Transfer Request Action: Create

Date or Date Range: From 10/01/2021 to 09/20/2022

User: Enter the ERA 2.0 username in First Name Last Name format. To search multiple users, enter a comma between names. For example: Jane Smith, John Smith.

The image shows a search interface with three main sections:

- Transfer Request Action**: A list of checkboxes with the following options:
  - Create
  - Submit for Agency Approval
  - Propose
  - Approve
  - Return
  - Accept Physical Custody
  - Accept Legal Custody
- Date or Date Range**: A date range selector with two rows:
  - From**: Month (10), Day (01), Year (2021)
  - To**: Month (09), Day (30), Year (2022)
- User**: A text input field containing the text "Jane Smith".

*The figure above shows the ‘Transfer Request Action,’ ‘Date or Date Range,’ and ‘User’ fields.*