ERA 2.0 Agency Troubleshooting Guide

July 2023

ERA 2.0 BOM Troubleshooting - Agencies

How to Use this Document

This Troubleshooting Job Aid is divided into sections, each of which represents a frequently encountered problem in ERA 2.0. For each problem, there are subsections that are meant to direct ERA 2.0 users to the correct advice. We recommend using the table of contents to skip to the relevant sections within this guide.

There are two types of advice in each section: a “Quick Checklist” and “Detailed Instructions.”

If you are comfortable navigating in ERA 2.0 and are familiar with the layout of the Dashboard and how the forms are structured, start with the Quick Checklist. It contains a list of steps to take to troubleshoot a particular problem.

If you want screenshots and detailed instructions of how to troubleshoot a problem, skip to the “Detailed Instructions” subsection under the heading that describes your problem. Finding a Records Schedule or Transfer Request That is Missing from a Dashboard

If You are A Records Scheduler or a Transferring Official

Quick Checklist

1. Check “My Tasks” on your Dashboard. Is the form present?
2. If you are searching for a Records Schedule, is there information under “Task Updates” that will help identify where this form is currently located? (IE - pending with NARA or pending with an Agency?)
3. Search for the form and open it. Is there information in the History & Activity Log that will help determine where this form is pending?
4. If none of the other steps were helpful, contact your Certifying Official or Approving Official and ask them to check their “My Team’s Tasks” for your form.

Detailed Instructions

Step 1: Check “My Tasks.”

The first place to look for a form (Records Schedule or Transfer Request) is under “My Tasks” on your Dashboard. The “My Tasks” tab sorts by Last Action Date, so you may need to sort by another category of information, like Records Schedule Number or Transfer Request Number.

Step 2: Check “Task Updates.”

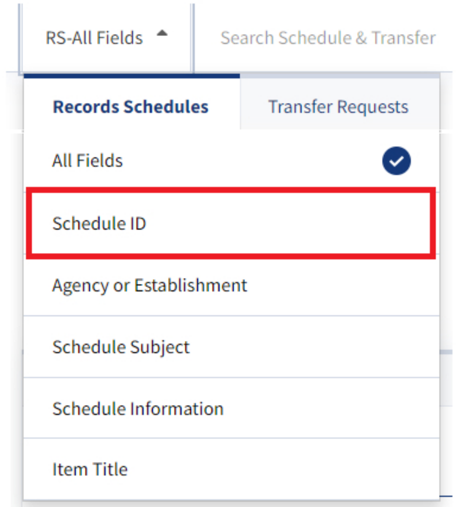
If the form is not under “My Tasks,” check “Task Updates.” There should be an “Action Required By?” column that shows whether the form is pending with the Agency or with NARA. If you are an Agency user and the form is with NARA, you cannot take action on the form. Agency users should contact their Appraiser or the Accessioning Archivist to either have the form returned for revision, or to request small updates.

Note: If you are an Agency user and have not taken action on a form in ERA 2.0, it will not appear in your Task Updates. You will need to run a search for the form as described below.

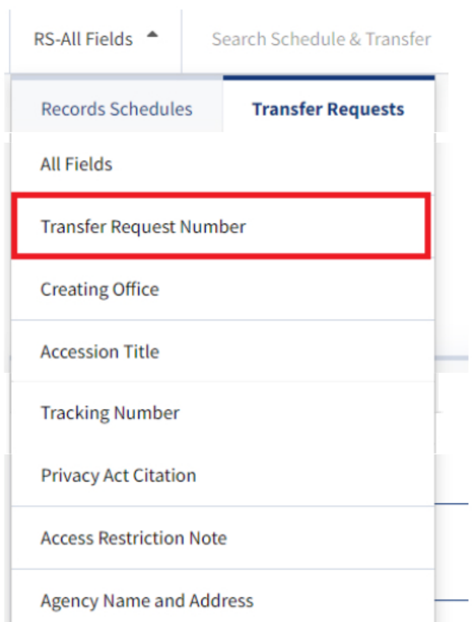
Note: There is no “Task Updates” tab for Transfer Requests. This tab only exists for Records Schedules.

Step 3: Search for the Form by ID and view the History & Activity Log.

If the form is not in your “Task Updates,” search for it by form ID. You can do this by clicking on the selection drop-down menu to the left of the “Search Schedule & Transfer” search bar.



The image above shows the Records Schedule Number “Schedule ID” option.



The image above shows the Transfer Request Number option.

Enter your ID in the search bar with quotation marks. Push the “Enter” key on your keyboard or click the magnifying glass option on the search bar. Your form should return in the search results.

Click on the eye icon to open your form.

The image above shows the “eye” icon that will open a form.

Click on the History & Activity Log tab.

The image above shows the link that will open the History & Activity Log.

What is the last action on the form? If the form contains a Certify action (Records Schedule) or a Propose action (Transfer Request), and there are no “Return for Revision” or “Return” actions, the form is pending with NARA. If there are no Certify or Propose actions, the form is pending with the Agency. If there is a “Return for Revision” or “Return” action, check and see if it is followed by Certify or Propose. If not, the form is pending with the Agency. If it was re-Certified or re-Proposed, it is pending with NARA.

Once you know where the form should be, reach out to the appropriate person for help. If the form is pending with NARA, contact your Appraiser or Accessioning Archivist to have the form updated or returned for revision.

Step 4: If all else fails, contact a supervisor.

Records Schedulers should contact their Certifying Official, and Transferring Officials should contact their Approving Official if the form is pending with the Agency but is not on the correct

Dashboard. The Certifying and Approving Officials can check “My Team’s Tasks” for more information about the form.

If You Are a Certifying Official or an Approving Official

Quick Checklist

1. If the form should be assigned to you, check “My Tasks.”
2. If it’s not there, or if someone else has asked for help in finding a form, check “Unassigned Tasks” and “My Team’s Tasks.”
3. If you are searching for a Records Schedule, is there information under “Task Updates” that will help identify where this form is currently located? (IE - pending with NARA or pending with an Agency?)
4. As a last resort, search for the form using its ID. Try to reassign it from the vertical ellipsis (if that option is available), or open the form and check the History & Activity Log for clues.
5. If none of these steps solve the problem, contact the Help Desk at erahelp@nara.gov.

Detailed Instructions

Step 1: If the form should be assigned to you, check “My Tasks.”

The first place to look for a form (Records Schedule or Transfer Request) is your Dashboard. If the form should be assigned to you, look under the “My Tasks” tab. The “My Tasks” tab sorts by Last Action Date, so you may need to sort by another category of information, like Records Schedule Number or Transfer Request Number.

Step 2: If the form should be assigned to someone else and they have asked for help, or if the form should be assigned to you but is not under “My Tasks,” check “Unassigned Tasks” and “My Team’s Tasks.”

If the form is not listed under “My Tasks,” or if someone else has contacted you for help in finding a form, check “Unassigned Tasks” and “My Team’s Tasks.”

Certifying Officials and Approving Officials will see all of the forms that are pending with members of their team in their “My Team’s Tasks.”

Records Schedule (53) | **Transfer Request (10)**

My Tasks | Unassigned Tasks | **My Team's Tasks**

Transfer Request Number	Type of Legal Transfer	Status	Status Date	Accession Title	Tracking Number	Assigned To
TR-0016-2023-0099	Direct Offer	Returned	06/09/2023	Loan Administration Files		FN-test-a36 LN-test-a36
TR-0016-2023-0098	Direct Offer	Draft	06/07/2023	Test of Return and Reassign		FN-test-a21 LN-test-a21
TR-0016-2023-0093	Direct Offer	Returned	06/02/2023	Reject Test 2		FN-test-a36 LN-test-a36
TR-0016-2023-0092	Direct Offer	Returned	06/02/2023	Reject Test 1		FN-test-a36 LN-test-a36
TR-0016-2023-0084	Direct Offer	Draft	04/19/2023	Testing Values in Access Restrictions		FN-test-a36 LN-test-a36
TR-0016-2023-0083	Direct Offer	Returned	04/13/2023	Public Relations Files - Director's Files		FN-test-a36 LN-test-a36
TR-0016-2023-0081	Direct Offer	Draft	04/10/2023	Project Subject Files		FN-test-a36 LN-test-a36

The image above shows the Dashboard of an Approving Official. Note the "Assigned To" column and a list of users.

The image above shows test data and test accounts, but the column headers mirror the real ERA 2.0 Production environment. The names in "Assigned To" will match actual usernames in the system.

Step 3: Certifying Officials should also check "Task Updates."

When Agency users (Certifying Officials and Approving Officials) check "My Team's Tasks," they will only see forms that are still pending for action with their Agency. To see forms that they have Certified, a Certifying Official should also check "Task Updates." **Note:** There is no "Task Updates" tab for Transfer Requests, so Approving Officials will not be able to see a list of their Proposed requests that are pending with NARA.

Dashboard

Create New Form

Records Schedule (53) | Transfer Request (9)

My Tasks | **Task Updates** | Unassigned Tasks | My Team's Tasks

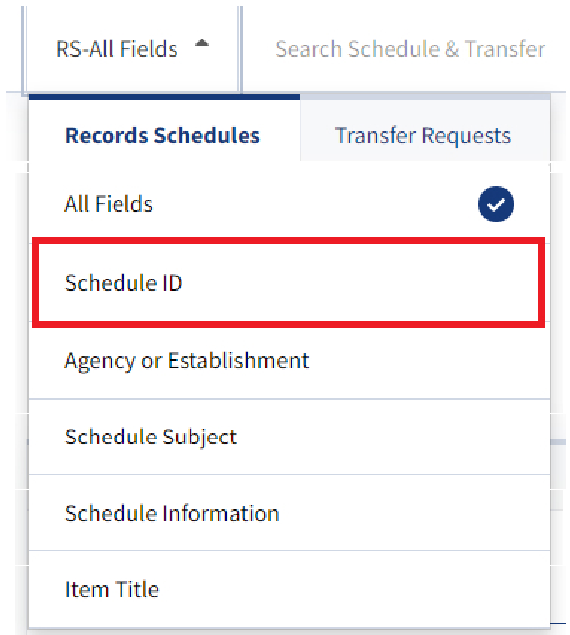
Records Schedule Number	Schedule Subject	Type	Agency or Establishment	Last Action	Last Action Date	Action Required By?
DAA-0016-2023-0086	RS 2	Records Schedule	Rural Development	Schedule submitted for NARA concurrences and approval	06/05/2023	NARA
DAA-0016-2023-0093	Test Schedule 06.05.2023	Records Schedule	Rural Development	Received	06/05/2023	NARA

The image above shows the Task Updates tab for a user with both the Certifying Official and Approving Official roles.

The "Action Required By?" column shows the organization that may currently take action on the form. In the example above, the schedules are pending with NARA.

Step 4: Search for the Form by ID

If the form is not on the Dashboard, search for it by form ID. You can do this by clicking on the selection drop-down menu to the left of the “Search Schedule & Transfer” search bar and choosing the ID search option. Enter the ID, with quotation marks.



The image above shows the Records Schedule Number “Schedule ID” option.

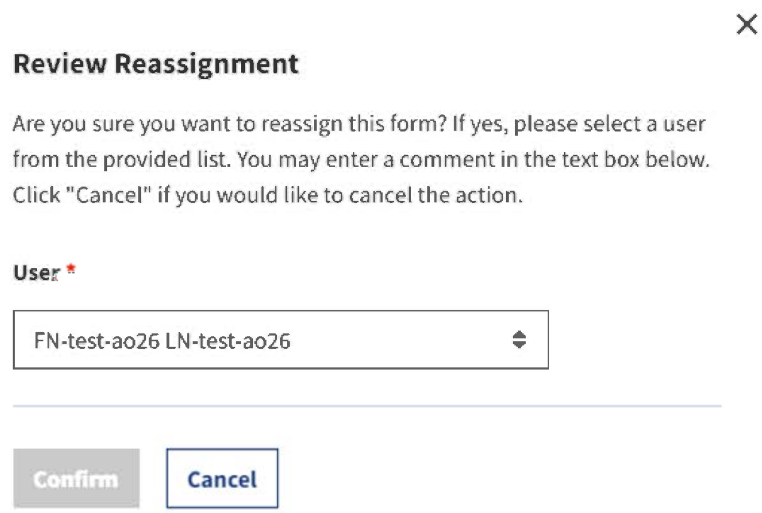
The search should return your form. On the right side of the screen, next to “Schedule Status,” there will be a vertical ellipsis. Click on the ellipsis. If you have permissions to reassign the form, you should see a “Reassign” option.

You should have permission to reassign a Transfer Request if you are an Approving Official and your agency created the Transfer Request. The Transfer Request must be in Draft, Submitted for Agency Approval, or Returned status.

As a Certifying Official, you should be able to reassign any Records Schedule that is in Draft, Submitted for Agency Approval, or Returned for Revision status.

The image above shows the vertical ellipsis menu and the “Reassign” option.

If you have the “Reassign” option, click it. A window should open with information about the form.



The image above shows the Review Reassignment pop-up window.

The user listed in the drop-down is the person to whom the schedule is assigned. The image above was taken in a test environment, so a test user (test-ao26) currently has this form on their Dashboard. Click ‘Cancel’ if you only need to know who has the form. Use the drop-down and click “Confirm” if you need to assign another user.

As a last resort, you will need to open the History & Activity Log. From your search window, click on the “eye” icon.

Once the form opens, click on the History & Activity Log tab.

The image above shows the link that will open the History & Activity Log.

What is the last action on the form? If the form contains a Certify action (Records Schedule) or a Propose action (Transfer Request), and there are no “Return for Revision” or “Return” actions, the form is pending with NARA. If there are no Certify or Propose actions, the form is pending with the Agency. If there is a “Return for Revision” or “Return” action, check if it is followed by Certify or Propose. If not, the form is pending with the Agency. If it was re-Certified or re-Proposed, it is pending with NARA.

Once you know where the form should be, reach out to the appropriate person for help. If the form is pending with NARA and you are an Agency user, contact your Appraiser or Accessioning Archivist to have the form updated or returned for revision.

Step 5: Contact the Help Desk

If none of this information helps identify where the schedule is pending or to whom it might be assigned, contact the ERA Help Desk at erahelp@nara.gov. Please include your name, your account roles (for example, Certifying Official), the form ID (Records Schedule or Transfer Request Number), and any additional information that will help describe the problem. For instance, contact the Help Desk if a Records Schedule should be assigned to a Records Scheduler but it is not appearing on any Dashboard tabs and can’t be reassigned through Search.

No Actions Can be Taken on a Schedule or Transfer Request

Quick Checklist

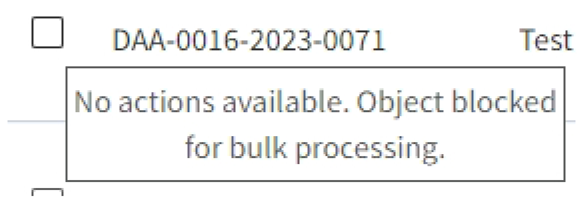
1) Was the form blocked as part of a bulk process? If so, refer to the "Failed Task Reporting" job aid.
2) Otherwise, if an action fails, or if you don't have the right actions available to you, contact the Help Desk.

Detailed Instructions

Step 1: Check to see if the schedule is stuck in a bulk process.

If a Records Schedule is assigned to you and you do not see tabs or sections of the schedule that you think you should see, the first thing to check is whether the request is stuck in a bulk process.

When you hover over the check box to the left of the schedule, do you see this box?



The image above shows the "Object blocked for bulk processing" pop-up.

If so, the form is blocked and you will not be able to take action on it until it is unblocked. Information about reporting this issue to the Help Desk can be found in the "Failed Task Reporting" job aid.

Step 2: Contact the Help Desk

If the form is not blocked due to a bulk process, contact the ERA Help Desk at erahelp@nara.gov and include the form ID as well as a description of your problem. Tell the Help Desk that you have already checked and believe that the form is not blocked as part of bulk processing.

A Task (Bulk Action, CSV, Download) Does Not Initiate or Stalls

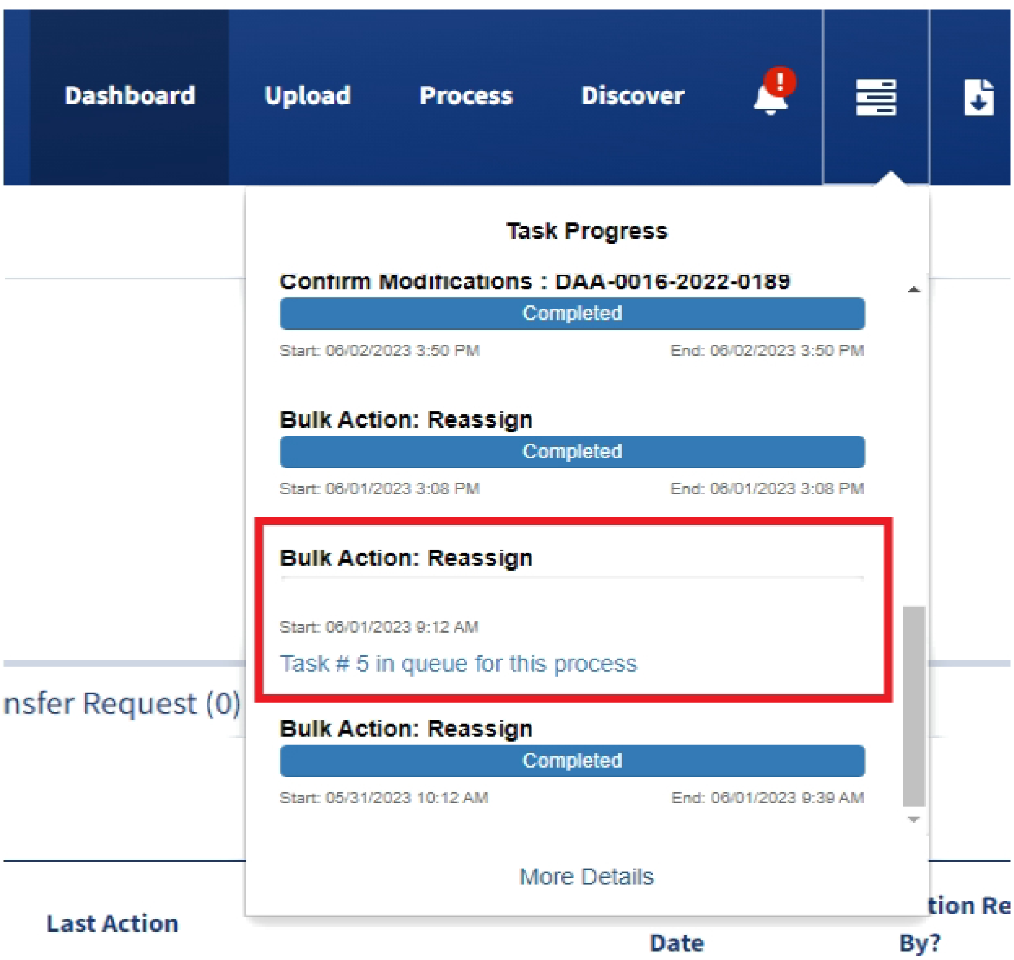
Quick Checklist

1) Check the Task Progress Menu and the task details – did the task fail, or did it never initiate or stall out?
    a) If it failed, follow the steps in the “Failed Task Reporting” job aid.
    b) If it never initiated or stalled midway through, contact the ERA Help Desk.

Detailed Instructions

Step 1: Check the Task Progress Menu.

Open the Task Progress Menu. Your task should be at the top, unless you have initiated additional tasks since trying the incomplete task.

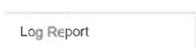


The image above shows a stalled Bulk Action: Reassign task.

Step 2: Contact the Help Desk

If your task has failed, it will be shown with a red progress bar and will state that it failed. In this case, report the failed task using the instructions in the Failed Task Reporting job aid.

If your task is in progress (with a partial blue bar) or has not yet started (with a clear status bar), click on the task for additional details.



The image above shows a task with a status of "Not_started."

Please be aware that tasks can sometimes take several minutes to complete. If you have waited a substantial amount of time and the task is still incomplete, email the Help Desk with the following information:

- Task Status
- Information about the task you were trying to perform
- The Task ID

The Task ID can be found in the URL of the "detailed tasks" view shown above.

The image above shows a closeup of the URL, with the Task ID underlined in red.