

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 14:** TR: GIT: NA 14130 Classified Records Checklist ([44:40 – 45:53](#))
- Slide 15:** TR: GIT: Screenshot of Checklist ([45:44 – 46:35](#))
- Slide 16:** TR: GIT: Access Restriction Privacy Act Notice ([46:27](#))
- 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 31:** TR: Terms of Agreement ([130:35 – 132:09](#))

Slide 32: TR: 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](#))