## Getting Started With Era

Getting started with ERA is easy by following the four-step process outlined below!

For further details, consult our Getting Started with ERA: User Account Guide or print out and keep by your desk the Getting Started with ERA: Quick Start Guide!

### Step One: Appoint an ERA Account Manager

The ERA Account Manager is the person within an agency who approves access to ERA. Frequently, the Agency Records Officer serves as the ERA Account Manager

**Action Item: The Agency Records Officer sends an email to NARA's ERA Account Official at ERAaccounts@nara.gov giving the name and contact information of the ERA Account Manager.**

**Action Item: The ERA Account Official carefully reviews Getting Started with ERA: User Account Guide and becomes familiar with the account management procedures.**

### Step Two: Determine ERA User Roles

Users of ERA have roles and, depending upon their roles, perform certain functions in ERA.

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 a Records Schedule to NARA for approval. The paper equivalent of this role is the person who signs in Box 6 of the paper Request for Records Disposition Authority (SF 115).

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 paper Agreement to Transfer Records to the National Archives of the United States (SF 258).

**Action Item: The ERA Account Official assigns ERA roles to users according to agency standard operating procedures.**

**Step Three: Get ERA Users Trained**

Once the ERA Account Manager has assigned an ERA system role to users, they will need to ensure that the user completes the required training for the role. Each user must complete training prior to submitting an ERA Account Request Form (NA 3070). ERA eLearning Intended Audience and Role Definitions for Federal Agencies identifies the needed training for the different roles.

**Action Item: ERA Users complete the appropriate eLearning class training before submitting an ERA User Account Request**

**Step Four: Submit ERA User Account Requests**

Individual users must complete the online ERA User Account Request Form (NA 3070) and submit it to NARA by clicking on the Submit Form button. Once submitted, the form will automatically be sent to ERAaccounts@nara.gov. The NARA ERA Account Official reviews the information and forwards it to the ERA Account Manager via email. The ERA Account

Manager should verify that the request is correct and complete, and then forward the request via email back to the NARA ERA Account Official at ERAaccounts@nara.gov.

**Action Item: ERA Users complete the online ERA User Account Request Form and submit to NARA.**

**Action Item: ERA Account Manager verifies information and forwards to ERAaccounts@nara.gov**