Transfer Request: General Information - Transfer Details Section
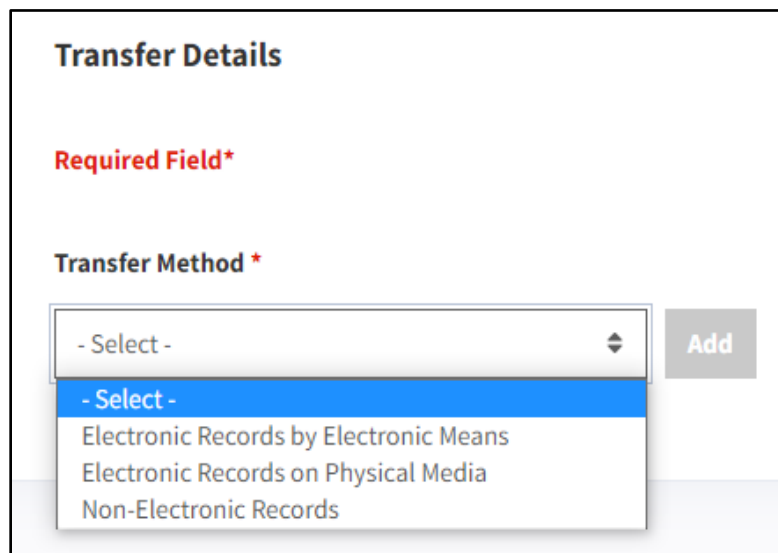
The **Transfer Details** section contains a drop-down field titled **Transfer Method**. This field is required as noted by the red asterisk after the word "Method." Instructions for each option can be accessed by clicking the links below or scrolling down in this document.

The options listed include:

- **Electronic Records by Electronic Means**

- **Electronic Records on Physical Media**

- **Non-Electronic Records**

> **Multiple transfer methods may be selected for a Transfer Request.

Each method must be selected in the drop-down field and then added by clicking the *Add* button. A screen capture of this section appears below.

Figure 1 Transfer Method Menu

Electronic Records by Electronic Means

This section provides guidance on how to complete a transfer of electronic methods by electronic means.

1. Select *Electronic Records by Electronic Means* from the **Transfer Method menu** (*shown on the previous page*).

2. Click the *Add* button. The **Transfer Method: Electronic Records by Electronic Means** dialogue box should appear. A screen capture of this dialog box appears below.
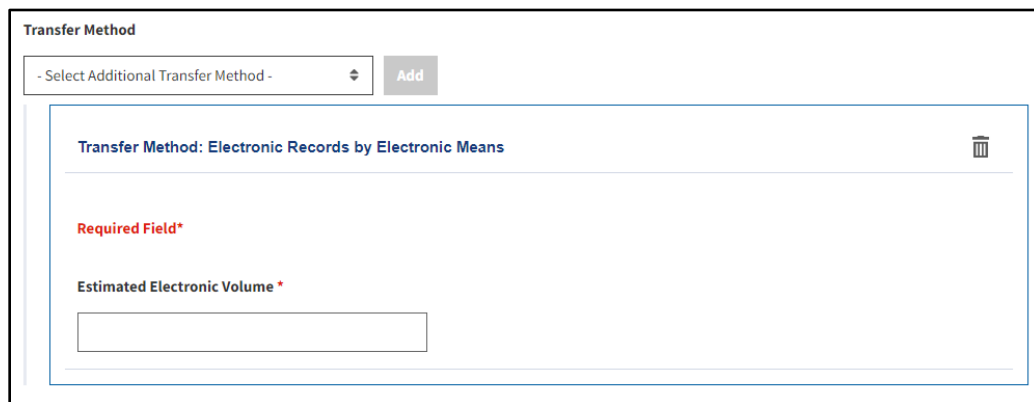

Figure 2 Transfer Method: Electronic Records by Electronic Means

3. Enter the **total size of all of the files in your records** in the **Estimated Electronic Volume** field. This can be identified by locating the file size of the outermost folder containing the records. Note this volume in kilobytes (KB) megabytes (MB), gigabytes (GB), terabytes (TB), or petabytes (PB).

At this point, you can return to the **Select Additional Transfer Methods** dropdown box and add *additional transfer method(s)* if needed or click the *Next* button. The **Contact Information** tab opens.

Electronic Records on Physical Media

This section provides guidance on how to complete a transfer of electronic methods from physical media.

1. Select **Electronic Records on Physical Media** from the Transfer Method menu (shown on the previous page).

2. Click the **Add** button. A dialog box labeled "**Transfer Method: Electronic Records on Physical Media**" should appear. A screen capture of this dialog box appears below with numeric labels.

Figure 3 Electronic Records on Physical Media Dialogue Box with numeric labels that match the steps on the following page

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In the **Transfer Method: Electronic Records on Physical Media** dialogue box:

1. Enter the **total size of all of the files in your records** in the **Estimated Electronic Volume** field. This can be identified by locating the file size of the outermost folder containing the records. Note this volume in kilobytes (KB) megabytes (MB), gigabytes (GB), terabytes (TB), or petabytes (PB).
2. Identify the **type of media** (e.g., CD, DVD, USB drive, hard drive) that your agency uses in the **Electronic Transfer Media Type** field.
3. Select **Destroy** or **Return to Agency** in the **Media Disposition field**. This tells NARA what you want done w/the storage media once the records are transferred.

Adding Containers (Optional)

Add Container is optional for electronic records on physical media, however, if you choose to add containers, some fields are required as shown in the bottom of the **Electronic Records on Physical Media** dialogue box.
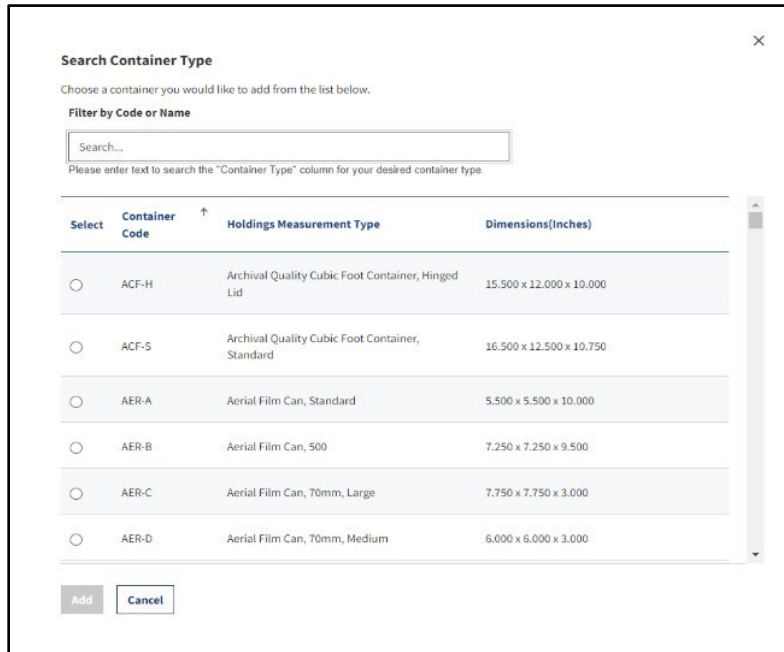

Figure 4 Bottom of the Electronic Records on Physical Media dialogue box showing the Add Container button, one container populated, and required fields marked in red

Note: If you choose to skip this step, however a line already appears, click the *trash can icon* at the end of the line to remove it.

Complete the following steps if you would like to add containers.

1. Click the *Add Container* button in the **Electronic Records on Physical Media** dialogue box. The **Search Container Type** dialogue box should appear. A screen capture of this box is shown below.

Figure 5 Search Container Type Dialogue Box

2. Use the *Search Container Type* dialog box to select your container.
3. Click the *Add button* at the bottom of the **Search Container Type** dialog box. The dialog box will close and return you to the **Electronic Records on Physical Media** dialogue box.
4. Enter *number of containers* in the **Quantity of Containers** field.
5. Enter the container number in the **Container Numbers** field.

At this point, you can return to the **Select Additional Transfer Methods** dropdown box and add *additional transfer method(s)* if needed or click the *Next* button. The **Contact Information** tab opens.

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Non-Electronic Records

This section provides guidance on how to complete a transfer of records that are non-electronic (e.g. hard copy) and will be transmitted via physical means (e.g. FRC-S boxes).

1. Select **Non-Electronic Records** from the Transfer Method menu (shown on the previous page).

Figure 6 Transfer Method: Non-Electronic Records dialog box

2. Click the **Add** button. The **Transfer Method: Non-Electronic Records** dialog box should appear.

3. Add the container details (i.e. *Quantity of Containers* & *Container Numbers*) for the FRC Standard Cartons item listed or if you do not need this container listed, click the *trash can icon* at the end of the line to remove it.

Note: Non-Electronic Records must include some container information.

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Additional or Different Containers

Complete the following steps if you would like to add different containers.

1. Click the *Add Container* button in the **Transfer Method: Non-Electronic Records** dialog box. The **Search Container Type** dialogue box should appear. A screen capture of this box is shown below.

Figure 7 Search Container Type Dialogue Box

2. Use the *Search Container Type* dialog box to select your container.
3. Click the *Add button* at the bottom of the **Search Container Type** dialog box. The dialog box will close and return you to the **Electronic Records on Physical Media** dialogue box.
4. Enter *number of containers* in the **Quantity of Containers** field.
5. Enter the container number in the **Container Numbers** field.

At this point, you can return to the **Select Additional Transfer Methods** dropdown box and add *additional transfer method(s)* if needed or click the *Next* button. The **Contact Information** tab opens.

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