

Just-in-Time Instructions for: Upload Attachments – Transfer Request

Use the Attachments tab to upload supporting documents related to the Transfer Request. The system supports uploading documents of any type (e.g., pdf, .docx, .xlsx, .csv, etc.) and you can upload more than one document.

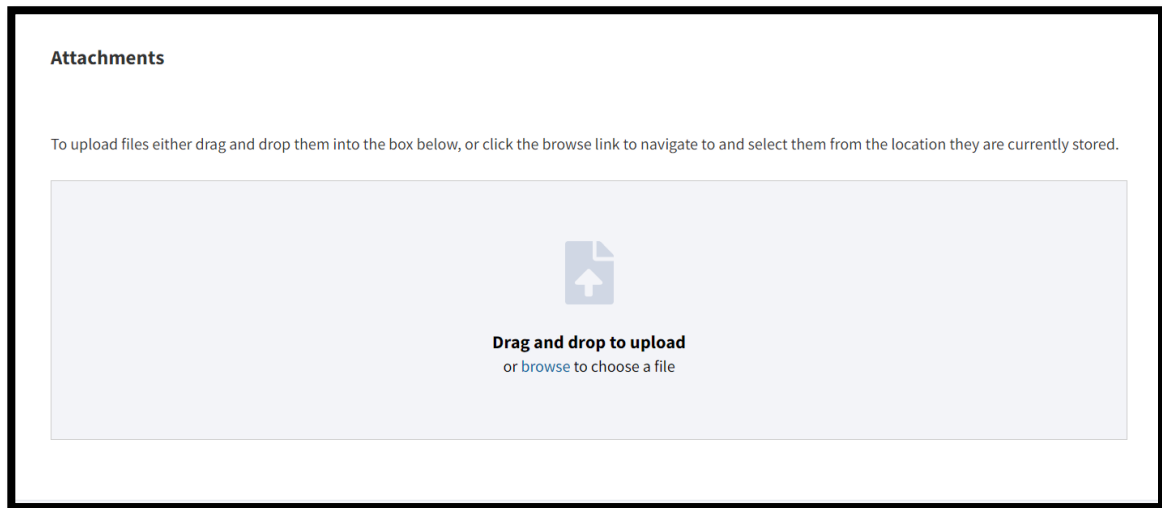



Figure 1: Attachments Feature Dialog Window

1. Follow the instructions on the Attachments tab for uploading your documents by either: 1) dragging and dropping them into the dialog window or 2) browsing your system to upload the file from a network location. The *Document Type* drop-down menu displays.

 Multiple documents may be attached simultaneously. ERA 2.0 adds the following meta-data to the uploaded document(s): 1) File Name, 2) Uploaded By, 3) Uploaded Date, 4) File Size, and 5) Status (which will be set as “In-Progress”).

2. Select the **document’s type** from the *Document Type* drop-down menu. Options are:
 - Classified records transfer checklist (NA-14130)
 - Correspondence

- Finding Aid (e.g., file list)
 - Kyl-Lott Certification
 - Memorandum
 - SF-115
 - Other
3. Enter **comments** into the *Comments* text-entry field as appropriate.
 4. Repeat **Steps 1 through 3** as appropriate until all the attachments are added.
 5. Verify that your document was successfully uploaded by selecting the Attachments tab and confirming that the meta-data updates the status of the document to **“Complete.”**



Figure 2: Attachments Meta-data & Completion Status Fields

6. Select **Next**. The Additional Reviewers tab displays. *This optional tab may be unavailable at the initial deployment of ERA 2.0 and is only used where Agency business process allows for it.*
7. Select **Next OR Preview & Submit** to access the Preview & Submit tab.

 Once a Transfer Request has been proposed and sent to NARA, agency users cannot add attachments to it.

END.