

## Just-in-Time Instructions for: Upload Attachments

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

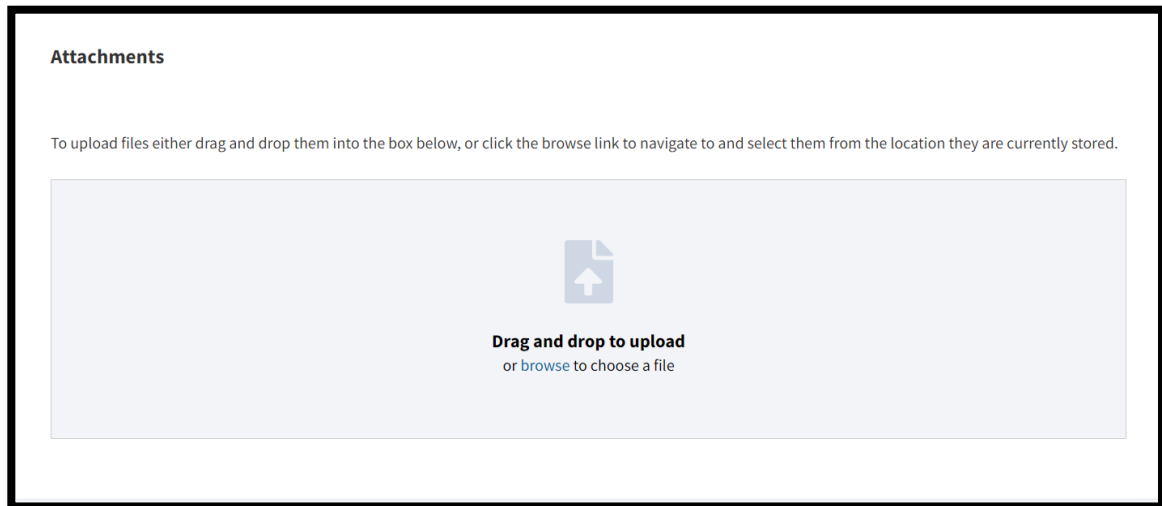


Figure 1: Attachments Feature Dialog Window

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. *Note: ERA 2.0 also attaches the following meta-data to the uploaded document:*

- File Name
  - Uploaded By
  - Uploaded Date
  - File Size
  - Status (which will be set as “In-Progress”)
2. Select the **document’s type** from the *Document Type* drop-down menu. Options are:
    - Early legal transfer checklist
    - Late legal transfer checklist

- Crosswalk
  - Approvals
  - Sample documents
  - Background information
  - Box list
  - Correspondence
  - Other
3. Enter **comments** into the *Comments* text-entry field as appropriate.
  4. Select **Next**. The Additional Reviewer(s) tab displays.
  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**.”

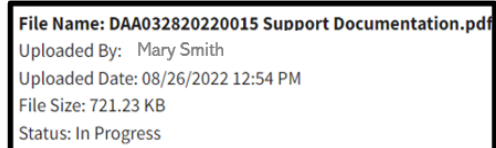



Figure 2: Attachments Feature Status Notification

 You will be able to access the attachments on the records schedule throughout the workflow (even after certified and sent to NARA). Once the records schedule has been certified and sent to NARA, Agency users will not be able to add attachments. However, the Appraiser at NARA may upload any additional attachments as appropriate.

**END.**