Transfer Request: Add Attachments

This job aid provides guidance on how to 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.

Use the following steps to upload documentation about the records that are being transferred, such as finding aids, container lists etc.

Note: Official records should not be uploaded as attachments.

1. To begin, you can either…
   a. …***drag and drop your files*** into **the box that appears in the Attachment Tab**,
   b. or click the ***browse link*** to navigate to and select them from the location they are currently stored.
2. Once a file or files have been uploaded, the **Document Type** menu should appear.
3. Select the ***Document Type*** from the **Document Type menu**.
4. Enter your ***comments*** into the **Comments** field (optional).
5. Click the ***Next*** button. The **Additional Reviewer(s)** tab displays.

To confirm that your document was uploaded, return to the ***Attachments*** tab, and check the status of the document.

** ERA 2.0 attaches the following metadata to the uploaded document:

File Name

Uploaded By

Uploaded Date

File Size

Status (initial status will be “In-Progress”)