

ERA 2.0 Job Aid: Access System & Log In



Purpose


The purpose of this document is to provide step-by-step guidance on how to get access to NARA's Electronic Records Archives (ERA) 2.0 System. It also provides guidance for logging into the system once access has been obtained. ERA 2.0 is a web-based application that provides Federal agency personnel with the tools to perform essential records management activities, such as scheduling records and transferring permanent records to NARA.

Agency partners have a critical role in helping to safeguard and preserve the records of our government; this job aid helps to enable Agencies to be able to perform these activities in the ERA 2.0 system.

Who Should Use This Job Aid?

This job aid is intended for federal agency users with the following ERA 2.0 user roles:

- Records Scheduler
- Certifying Official
- Transferring Official
- Approval Official

 All initial federal agency users of ERA 2.0 will have the same profiles as they had in the original ERA system, and all Account Managers in the current ERA system will continue to serve as Account Managers in ERA 2.0. To modify existing accounts, request new accounts, or for any other issues regarding ERA 2.0 user accounts, please visit <https://www.archives.gov/era>.

Step-By-Step Instructions for: Access System & Log In to ERA 2.0

ERA 2.0 provides Federal agency personnel with the tools to perform essential records management activities, such as scheduling records and transferring permanent records to NARA

To perform these actions, Federal agency personnel must be recognized as users of the system and be assigned to at least one of the following User Profiles: 1) Records Scheduler, 2) Transferring Official, 3) Certifying Official, and 4) Approving Official.

The steps for getting access and logging into ERA 2.0 have been divided into the following sub-tasks:

1. Obtain a MAX.gov Account (One-time action)
2. Log Into ERA 2.0

Instructions for completing each of the above tasks follows.

Step 1: Obtain MAX.gov Account (One-time Action)

A MAX.gov account is a pre-requisite for access to ERA 2.0, and unless an exception has been granted, users will be required to log in with their PIV/CAC card. If you are unable to log in using a PIV/CAC card please contact the ERA Help Desk (ERAhelp@nara.gov / 877-ERA-9594 [877-372-9594]) to request the implementation of the alternate Email-based MAX.gov authentication for your ERA 2.0 account.

1. Navigate to the **MAX.gov** homepage accessible at the following URL: <https://portal.max.gov/portal/home>
2. Select **Register Now** on the upper right of the homepage.



Figure 1: MAX.GOV Homepage

3. Select the **appropriate option** from the dialog window that displays. Available options are: *registration via PIV/CAC card* or *registration via email*. Instructions for both options follow.

Register for MAX.Gov Account with PIV/CAC Card

1. Select **Yes (Register with my PIV/CAC card)** from the *MAX.GOV Register* dialog window.

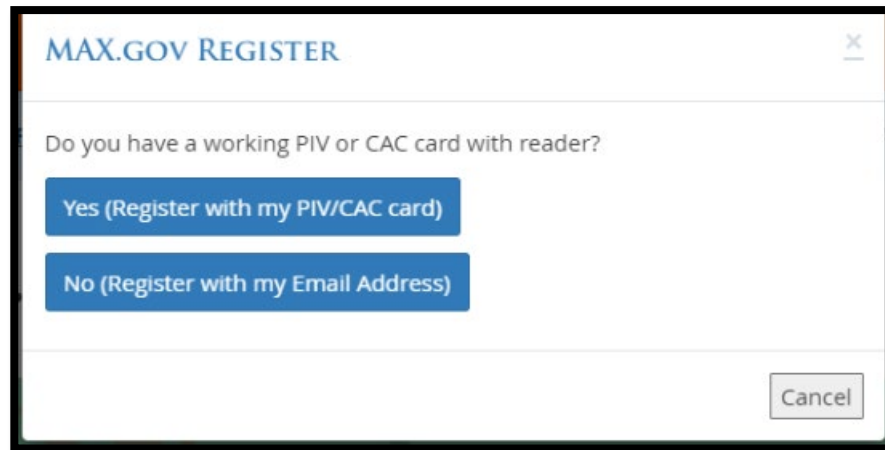


Figure 2: MAX.GOV Registration Dialog Window

2. Select your **Certificate** in the dialog box that displays.
3. Select **Ok**. The **MAX.GOV LOGIN** homepage displays.

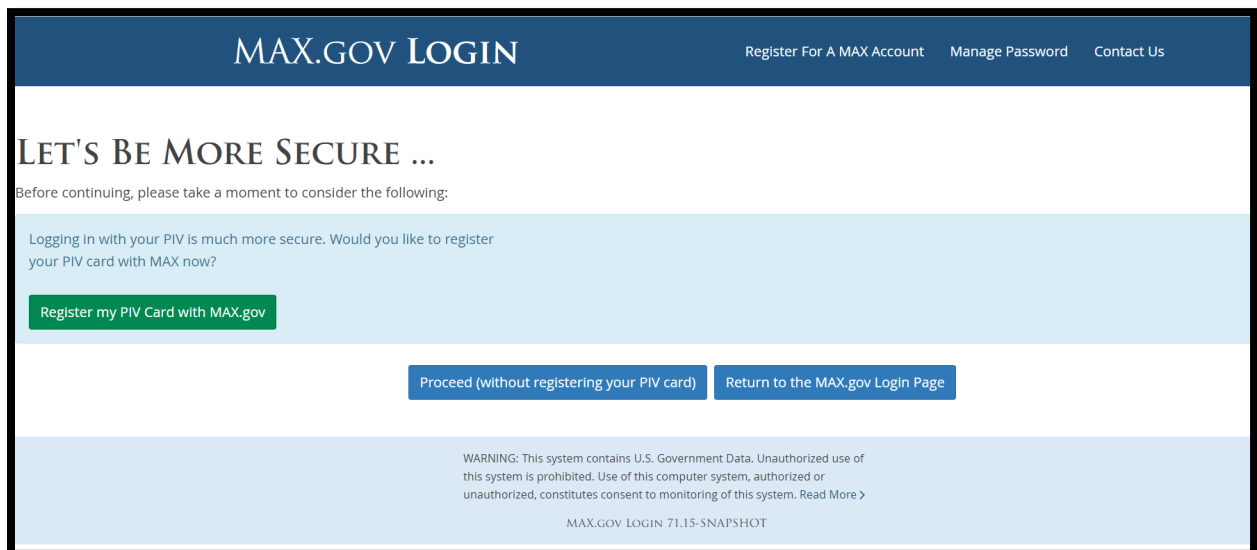


Figure 3: MAX.GOV Login Homepage

4. Select **Register my PIV Card with MAX.gov**. The following error page may display:



Figure 4: MAX.GOV PIV Registration Error Message

5. Allow a few minutes for the **Smart Card Authentication** dialog box to display. If the box does not display, follow the onscreen prompts to start over, or reach out to the MAX Support Team for additional support.

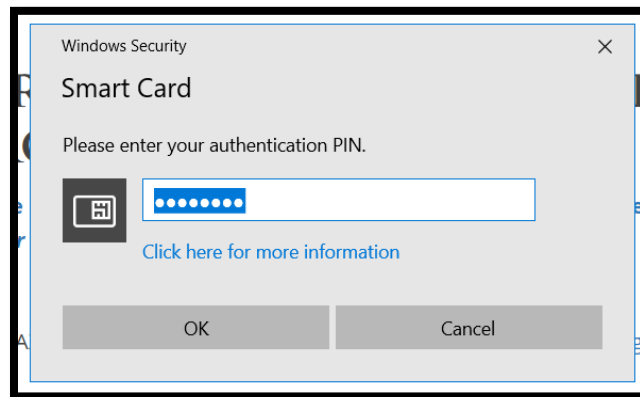


Figure 5: SMART Card Authentication Dialog Box

6. Enter your **Authentication PIN** in the **Smart Card Authentication** dialog box.
7. Select **Ok**. The **Smart Card Authentication** dialog box.

8. Enter your **email address** in the corresponding field on the window that displays.
9. Select **Register** to create an account.
Note: To complete your registration, you will need a Validation code which will be sent from the **MAX.GOV** portal to the email address you entered.
10. Retrieve your **Validation code** from your email.
11. Enter your **email address** and **Validation Code** in the fields available on the window that displays.

MAX.GOV REGISTRATION

MAX PIV CERTIFICATE VALIDATION CODE SUCCESSFULLY SENT

Type the PIV certificate validation code from the bottom of the PIV Certificate Registration email into the space below. Then click the *Submit* button. You can also click the *Cancel* link to cancel the PIV certificate registration process.

*MAX User ID

*Validation Code

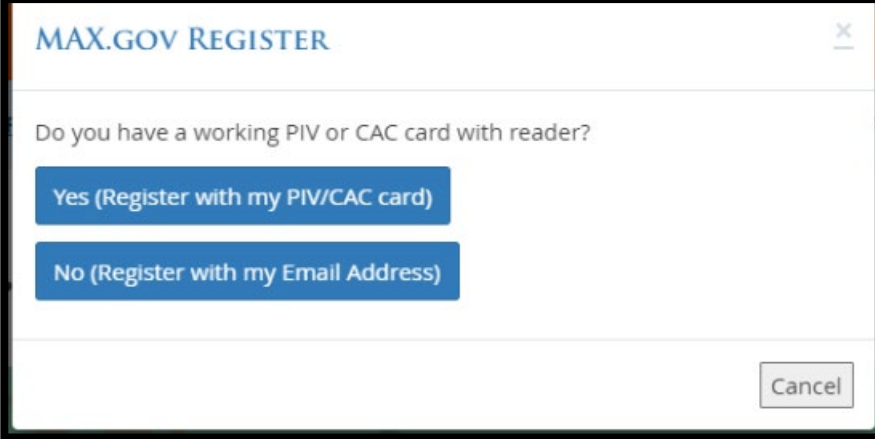
MAX SUPPORT
Email: maxsupport@max.gov Phone: Weekdays 8:30 AM - 9:00 PM EST at 202-395-6860

Figure 6: MAX.GOV PIV Certificate Validation Code Entry Page

12. Select **Submit**.
13. Select **Continue** on the Success dialog window that displays. You have now created an account in MAX.GOV. Your ERA 2.0 User Management Admin may need to enable your User Profile prior to accessing the system. Consult with your Agency for further guidance if you require additional assistance. Otherwise, you should now be able to use your MAX.GOV credentials to log into ERA 2.0.
14. Go to Step 2: **Log Into ERA 2.0** for instructions for logging into the system.

Register for MAX.Gov Account with An Email Address

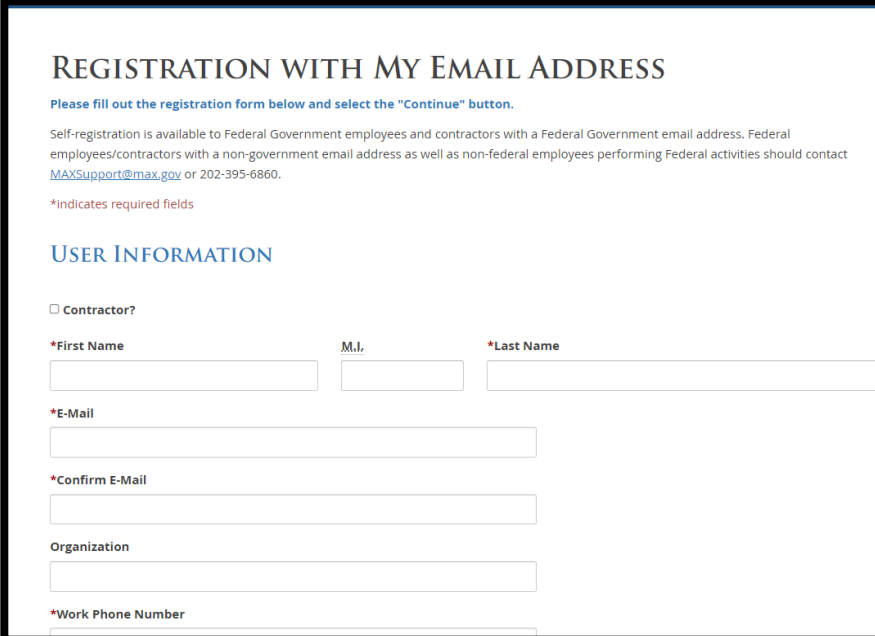
1. Select **No (Register with my Email Address)** from the *MAX.GOV Register* dialog window.



The image shows a dialog window titled "MAX.GOV REGISTER" with a close button (X) in the top right corner. The main text asks, "Do you have a working PIV or CAC card with reader?". Below this question are two blue buttons: "Yes (Register with my PIV/CAC card)" and "No (Register with my Email Address)". A "Cancel" button is located in the bottom right corner of the dialog.

Figure 7: MAX.GOV Registration Dialog Window

2. Complete the **User Information** section of the *Registration* form that displays.



The image shows the "REGISTRATION WITH MY EMAIL ADDRESS" form. At the top, it says "Please fill out the registration form below and select the 'Continue' button." Below this is a paragraph of text explaining self-registration eligibility and contact information: "Self-registration is available to Federal Government employees and contractors with a Federal Government email address. Federal employees/contractors with a non-government email address as well as non-federal employees performing Federal activities should contact MAXSupport@max.gov or 202-395-6860." A note states "*indicates required fields".

The "USER INFORMATION" section includes:

- Contractor?
- *First Name, M.I., and *Last Name (each with a text input field)
- *E-Mail (with a text input field)
- *Confirm E-Mail (with a text input field)
- Organization (with a text input field)
- *Work Phone Number (with a text input field)

Figure 8: MAX.GOV Registration With My Email Address Form - User Information Section

3. Complete the **Work Address** section of the *Registration* form.

*Work Phone Number

WORK ADDRESS

*Address - Line 1

Address - Line 2

*City *State

Select a State

*ZIP Code *Country

United States of America

Continue Cancel

Figure 9: MAX.GOV Registration With My Email Address Form - Work Address Section

4. Select Continue. The MAX User Agreement dialog window displays.

MAX USER AGREEMENT

[Please read the user agreement below and agree to the terms of use to continue your registration to MAX.gov.](#)

This agreement is issued under the authority of the Federal Information Security Management Act of 2002 (Pub. L. No. 107-347, Title III).

By checking the "I ACCEPT" check boxes and clicking on the "REGISTER" button, I signify my understanding and acceptance of these policies and practices concerning access to the MAX systems and that I will be held accountable for any breach of these policies and practices.

MAX is a U.S. Government computer system used to conduct official government business. Business conducted on MAX shall be conducted in a manner above reproach and in accordance with the highest ethical standards to ensure the public's confidence in the integrity of the Government, its employees, and systems.

1. I understand that the MAX systems are U.S. Government systems for the purposes of conducting official Government business, and that the MAX User ID and any other information related to access and use of the MAX systems are considered sensitive and critical.
2. I will NOT enter classified information into the MAX systems.
3. I will protect my personal password from disclosure.
4. I will log off of or otherwise restrict access to any MAX System session when I am not personally attending to it.
5. Upon completion of my government-related duties that involve using the MAX systems, I will contact the MAX Data Management Team to ensure my User ID is properly disabled.
6. If I suspect someone else has tried to learn my password or fraudulently gain access to the MAX systems I will immediately report the incident to a MAX representative.

I acknowledge that with my MAX ID I may have access to government information of a sensitive or critical nature that is the sole property of the U.S. Government and I hereby agree to protect that information in the strictest confidence and to use it only to support Government purposes.

I AGREE

Register Go Back Cancel

Figure 10: MAX.GOV User Agreement

5. Read the Agreement Terms.

6. Select **I Agree**, as appropriate.

7. Select **Register** to create an account.

Note: To complete your registration, you will need to create a password. An email with additional instructions and relevant links will be sent from the MAX.GOV portal to the email address you entered on the *Registration* form.

8. Retrieve your **Password Link** from your email.

9. Select the **Password Link**. The *Change Password* dialog window displays.

10. Enter **New Password** in the corresponding field.

11. Enter the **New Password** in the *Confirm New Password* field.

12. Select **Submit**.

13. Verify the **Password Change Confirmation** displays as follows:




Figure 11: MAX.GOV Password Change Confirmation

Your ERA 2.0 User Management Admin may need to enable your User Profile prior to accessing the system. Consult with your Agency for further guidance if you require additional assistance. Otherwise, you should now be able to use your MAX.GOV credentials to log into ERA 2.0.

14. Go to Step 2: **Log Into ERA 2.0** for instructions for logging into the system.

Step 2: Log into ERA 2.0

 The following instructions assume that you already have a MAX.GOV account (i.e., User ID and Password) registered and an ERA 2.0 User Profile enabled. If this is not true for you, go to Step 1: Obtain MAX.GOV account.

Users access ERA 2.0 from the web; recommended browsers are Google Chrome or Microsoft Edge.

1. Navigate to the **ERA 2.0 external login page** at the following URL: <https://upload.era.archives.gov/webapps-dpe/#/>

You will be redirected to the **MAX.GOV** homepage.

2. Choose your **Sign in option** from the available menu; choose **Continue with PIV/CAC** if an exception has not been granted.

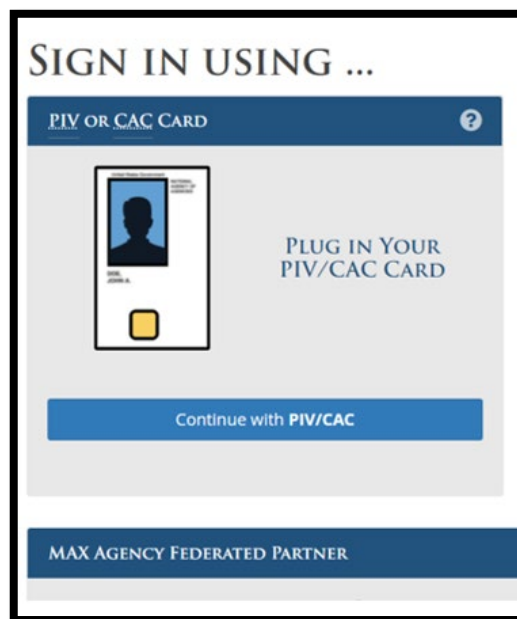


Figure 12: MAX.GOV Sign In Page

3. Enter **Smart Card Credentials** and then **OK** on the Certificate Authentication dialog box that displays.

4. Select **Continue with PIV/CAC ONLY** if the following screen displays. Otherwise, go to Step 5.

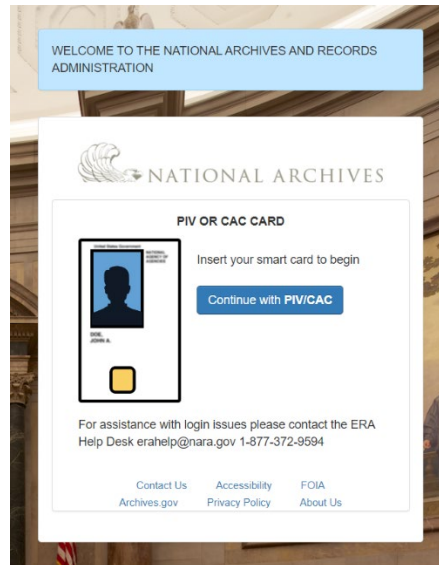


Figure 13: ERA 2.0 Login Screen

5. Confirm that your ERA 2.0 Dashboard is visible. If not, you may need to consult with your ERA 2.0 User Management Admin for further assistance.

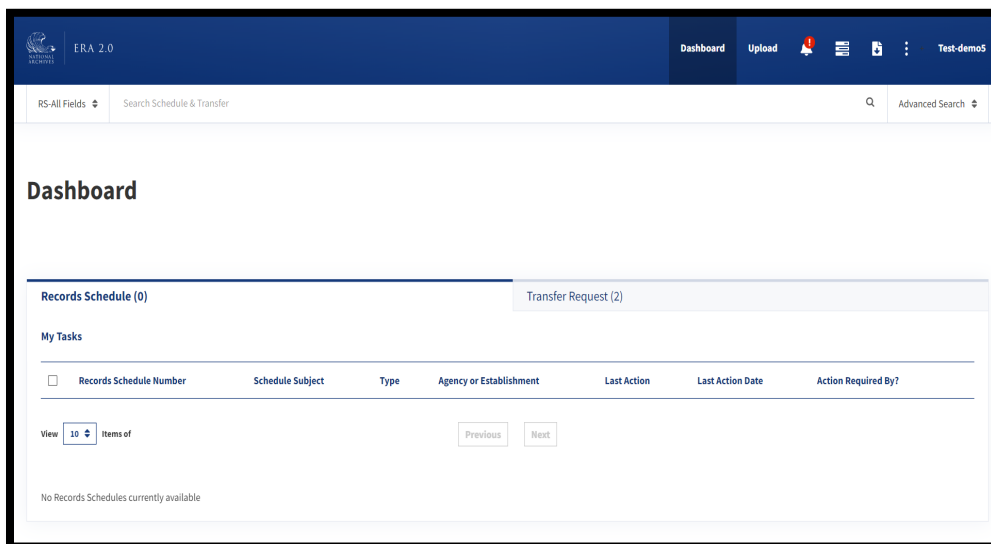


Figure 14: ERA 2.0 User Dashboard

END.