ARCIS reference request training participants should complete the following exercises between Session I and Session II of ARCIS Reference Request training.

Feel free to utilize any training aids provided during training to help in completing the exercises.

Please complete within 4 hours of the end of Session I to allow time for the instructor to process some of your submitted requests prior to Session II. These exercises should not take more than 1 hour to complete.

1. Login to the ARCIS sandbox at http://gpeatest.archives.gov/arciscustqa/. Use the appropriate UserID and password from the table below.

Please do not change or reset these passwords.

If your last name begins with:	UserId to Use	Password to Use
A thru E	RefStu1@nara.gov	change123
F thru L	RefStu2@nara.gov	change123
M thru R	RefStu3@nara.gov	change123
S thru T	RefStu4@nara.gov	change123
U thru Z	RefStu5@nara.gov	change123

3. Create Reference Request without saving.

> a. Navigate to the Reference Requests screen and click the "New Reference" button.
>
> b. Complete required data entry fields as appropriate for a request you would typically submit to a NARA FRC.
>
> > • Use the Request Category "Transfer".
> > • Include your name in the "Recipient Name" field.
> > • Change the address.
>
> c. Without saving, click the "Continue to Review and Submit".
>
> d. Review entry and click the "Submit" button.
>
> e. Navigate back to the Reference Requests screen and notice the Request Status for the Request you just created.
>
> f. Repeat steps a thru e for each type of request (Request Category) you might typically submit.

4. Create a request and save to finish later.

a. Navigate to the Reference Requests screen and click the "New Reference" button.

b. Complete required data entry fields as appropriate for a request you would typically submit to a NARA FRC.

- Include your name in the "Recipient Name" field.

c. Click the "Save and Continue Later" button.

d. Navigate back to the Reference Requests screen and notice the Request Status for the Request you just created.

e. Click on the Reference Request # link for the request you just created. The status should be "Reference Initiated".

d. Click the "Edit" button on the screen that opens.

e. Modify the data in the Case/File Information field (or some other field).

f. Click "Continue to Review and Submit" button, then click the "Submit" button on the review page. The status for this request should now have changed from "Reference Initiated" to "Reference Received".

5. Create request using copy function.

a. Navigate to the Reference Requests screen.

b. Click the query button, and select "Transfer" from the Request Category drop-down list; then click the "Go" button.

c. Select one of the requests and click the Reference Request # link to view the request details. Make note of the container number requested.

d. Click the "Back to Reference Requests" button.

e. Click the "Copy Reference Request" icon that is in the same row as the "Reference Request # you just viewed.

f. Enter the new Container #. Tip: You can manually enter the container number without opening the pick-list.

g. Click "Continue to Review and Submit" button, then click the "Submit" button on the review page.

h. Click the "Reference Request" screen tab, and quickly copy the request again to create a request for another container from the same transfer.

6. Query to locate requests.

 a. Navigate to the "Home" screen.

 b. Locate and click the link for "My Agency Reference Requests".

  Note: The query function works the same way in the "My Reference Requests" view, but there will be more requests to query for practice with in the agency level view. In the live production system, not all users will have access to the "My Agency Reference Requests" view.
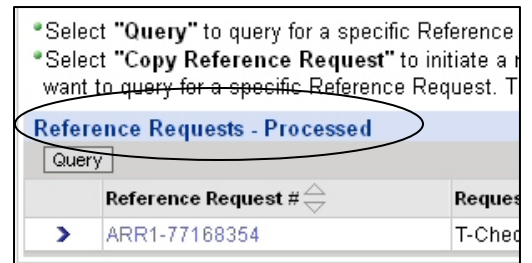
 c. Locate and click the "Reference Requests - Processed" link.

 d. Click the "Query" button.

 e. Select "Reference Processing" from the Status field drop-down and click the "Go" button.

 f. Review results. If the results were negative, verify you are in the "Reference Requests - Processed" view and try again. If still negative, try the next step.

 g. Query again for the status of "Shipped".

 h. Start a new query and look for any Reference Request # that ends with a 6. Tip: Use the wildcard asterisk. Your query condition should be entered as "*6", but without the quotation marks. If results are negative try another number.

 h. Start a new query and select the Request Category = Transfer and the Status = Shipped.

We will discuss the results of this exercise during Session II. Feel free to navigate around the system further and enter additional requests.