

Archives and Records Centers Information Systems

Training Workbook



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Interdependent ARCIS Components

Interdependent ARCIS Components

- **User Administration:** Set up ARCIS users and assign them capabilities.
- **Access Control:** Restrict what records each user can access.
- **Records Transfers:** Submit SF 135s online and track the status of records transfers.
- **Reference Requests:** Submit OF 11s online and track the status of reference requests.



ARCIS Statuses by Category

Records Transfers

My Agency Workspace

Initiated
Review Requested
Corrections Requested
Submitted
Clarification Requested
Approved

FRC Workspace

Partially Received
Received
QC- Sample Completed
Shelving In Progress
Partially Shelved
Shelved
Disposition Generated
Disposition Approved
Disposed
Accession Generated
Accession Approved
Accessioned
In Place Accessioned
Permanently Withdrawn
Cancelled
Realigned

Reference Requests

My Agency Workspace

Reference Initiated
Reference Received

FRC Workspace

Reference Processing
Quality Assurance
Ready For Shipment
Shipped
Reference Not Found
Reference Cancelled
Realigned

Sample ARCIS User Profile Summary Page

User

Done

Last Name: GREENLEE **First Name:** DON **Middle Name:** **Role:** Administrator

Profile Setup

- Basic User Information
- Branch
- Records Center
- Record Group
- Charge Account
- Security Classification
- Agency Defined
- Capability
- Reference Request Category

Profile Summary

Assigned Branches 1 - 2 of 2

Primary	Level	Branch	Description
>	2	ROOT	ROOT
>	✓	3	OIG

Assigned Security Classifications 1 - 3 of 3

Security Classification	Security Level	Allow Reference	Allow Transfers
>	Unclassified	Standard Storage	✓
>	Unclassified	Restricted Storage	✓
>	Classified	Secret	✓

Assigned Records Centers 1 - 2 of 2

Primary	Records Center	Allow Reference	Allow Transfers
>	FRC - Atlanta	✓	✓
>	✓	FRC - Boston	✓

Assigned Agency Defined 1 - 1 of 1

Agency Defined	
>	NONE

Assigned Record Groups 1 - 1 of 1

Primary	Record Group	Description	Allow Reference	Allow Transfers
>	✓	991	Test Agency 6	✓

Assigned Capabilities 1 - 8 of 8

- > **Capability**
- > Administration: I can create and manage users and contacts
- > Basic: I can view basic pages and edit my personal information (required)
- > Records Transfers 1, CREATE: I can create transfers, and I can edit and track the transfers I created
- > Records Transfers 2, EDIT: I can edit and track transfers for which I am the agency contact
- > Records Transfers 3, APPROVE: I can approve transfers created by others
- > Records Transfers 4, RE-ASSIGN: I can re-assign transfers to a different agency contact or approver
- > Records Transfers 5, PROFILE-SPECIFIC VIEW: I can view transfers whose properties match those in my profile
- > Records Transfers 6, AGENCY-WIDE VIEW: I can view all transfers from my agency, regardless of their properties

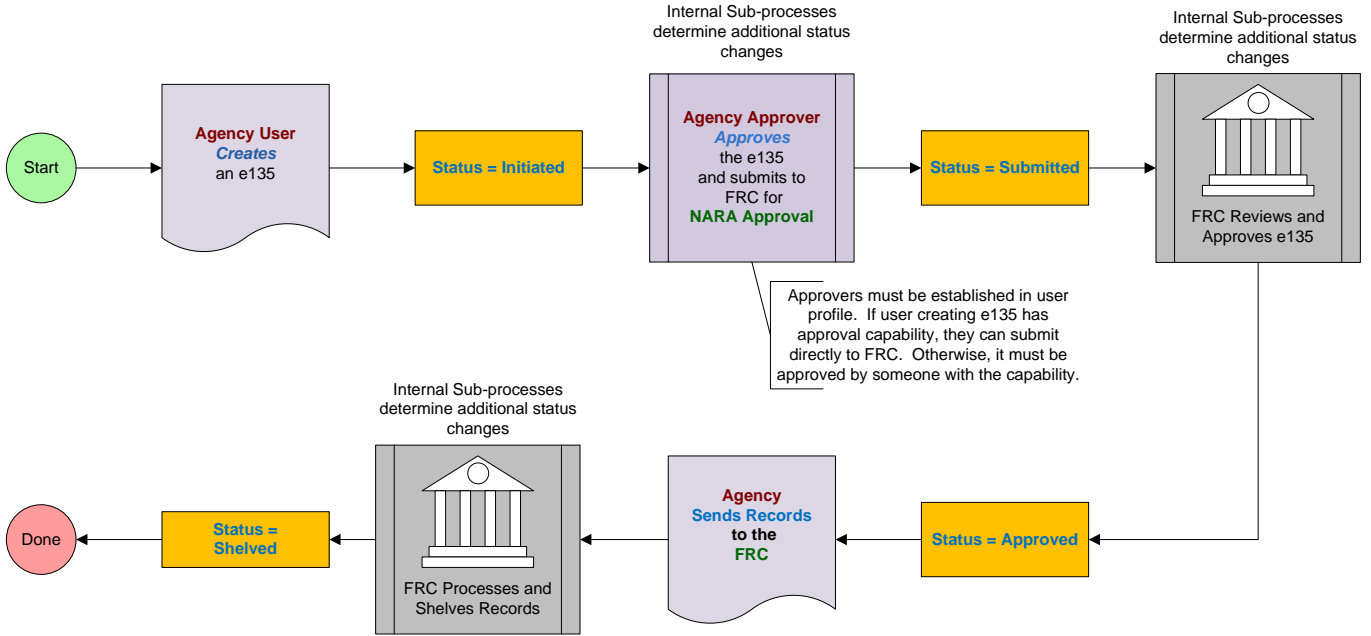
Assigned Charge Accounts 1 - 1 of 1

Primary	Charge Account	Charge Code	Charge Code Description	Allow Reference	Allow Transfers
>	✓	999991T6	T6	ARCIS Practice Charge Code 6	✓

Assigned Reference Categories 1 - 1 of 1

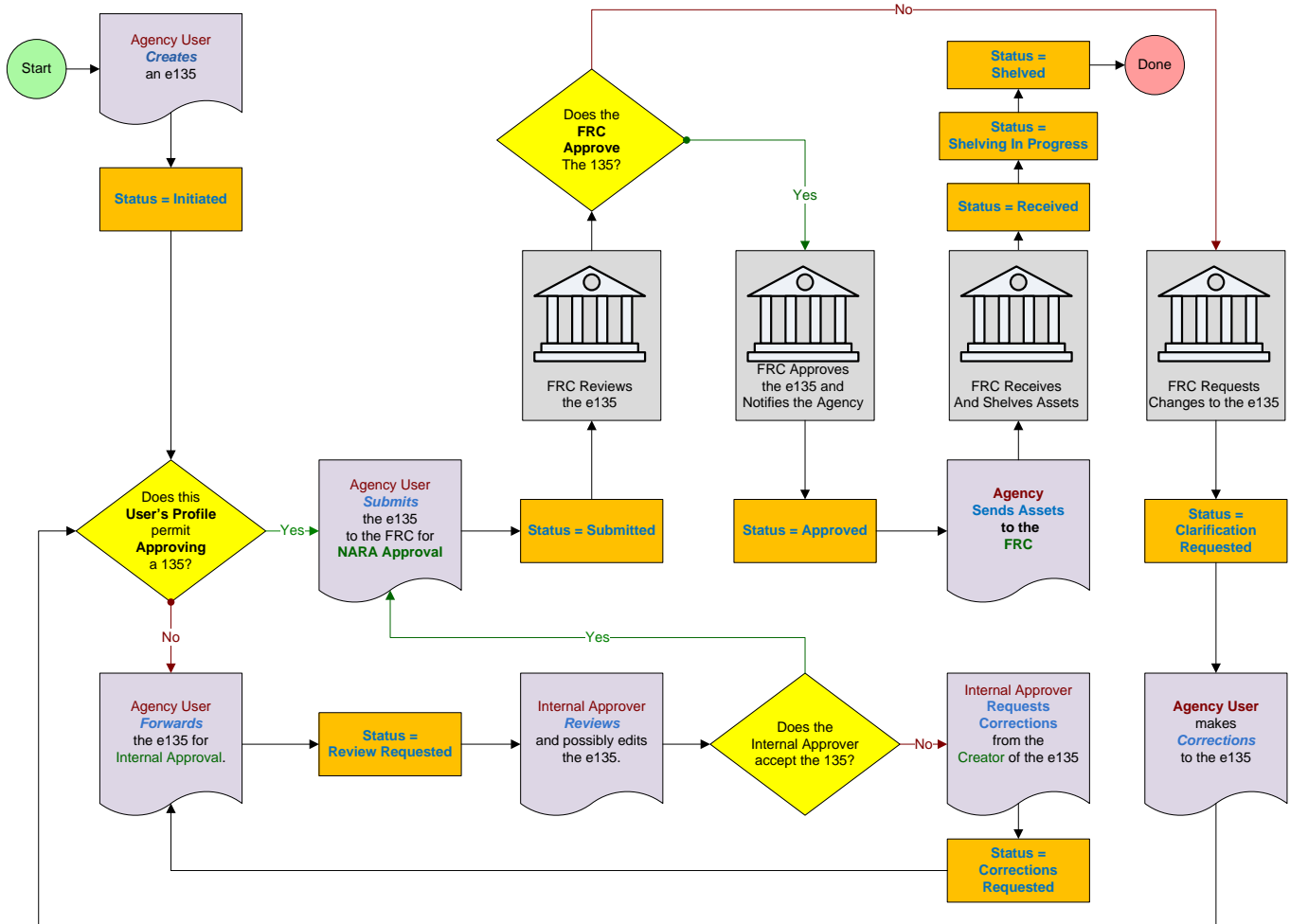
Reference Category	
>	General Reference

Basic Records Transfer Process Flow



Note: Internal sub-processes and ARCIS status options are available but not shown. See page 3 for comprehensive process with all available process options.

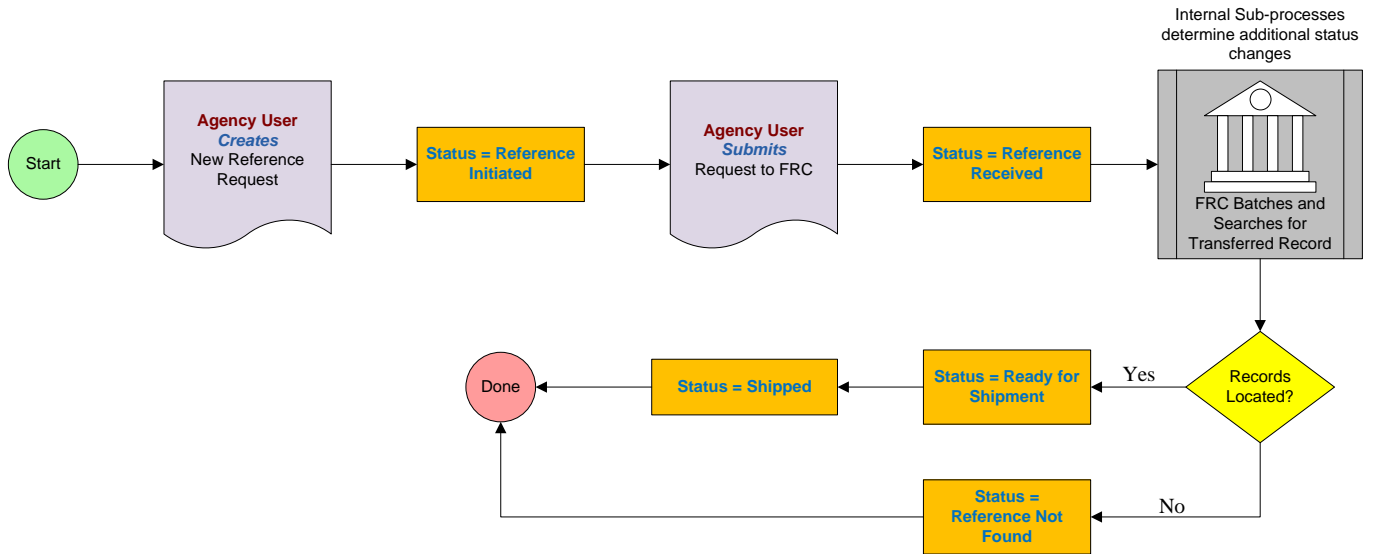
Comprehensive Records Transfer Process Flow



Sample ARCIS Born SF-135

RECORDS TRANSMITTAL AND RECEIPT		Complete and send original and two copies of this form to the appropriate Federal Records Center for approval prior to shipment of records.				Page 1				
1. TO (Complete the address for the appropriate Records Center serving your area) FRC - Philadelphia Facility - 01 As shown in FPMR 101-11.410-1		5. FROM (Enter the name and complete mailing address of the office retiring the records. The signed receipt of this form will be sent to this address) Customer Reference Number : ANYTHING YOU WANT Sample Agency B2 B21, Sample Agency, General Records of the 99 NEW YORK AVENUE WASHINGTON, DC 20000								
2. AGENCY TRANSFER AUTHORIZATION TRANSFERRING AGENCY OFFICIAL(Signature and Title) SUSAN SUPER		DATE								
3. AGENCY CONTACT TRANSFERRING AGENCY LIAISON OFFICIAL (Name, Office and Telephone No.) ARCIS STUDENT1 Sample Agency B2 Phone --										
4. RECORDS CENTER RECEIPT RECORDS RECEIVED BY (Signature and Title) FRC - Philadelphia		DATE								
6. RECORDS DATA										
TRANSFER NUMBER			VOLUME	No. Of Containers	SERIES DESCRIPTION	RESTRICTION	DISPOSITION AUTHORITY	DISPOSITION DATE	LOCATION	CONTAINER TYPE
RG	FY	NUMBER	(in ft.)	(e)	(with inclusive dates of records)	(g)	(h)	(i)	(j)	(k)
(a)	(b)	(c)	(d)		(f)					
B21	2012	0001	5	5	^ 11 - SERIES DESCRIPTION Inclusive Start Date : 10/01/2007 Inclusive End Date : 09/30/2008	Agency Personnel Security Classification : Unclassified Security Level : Standard Storage	Sample Agency B21 Disposition Code : Temporary Disposition Citation : DAU 123.c/b	07/01/2025		Standard
NSN 7540-00-634-4093			135- 107			Standard Form 135 (Rev. 7-85) Prescribed by NARA 36 CFR 1228.152				

Reference Requests Process Flow

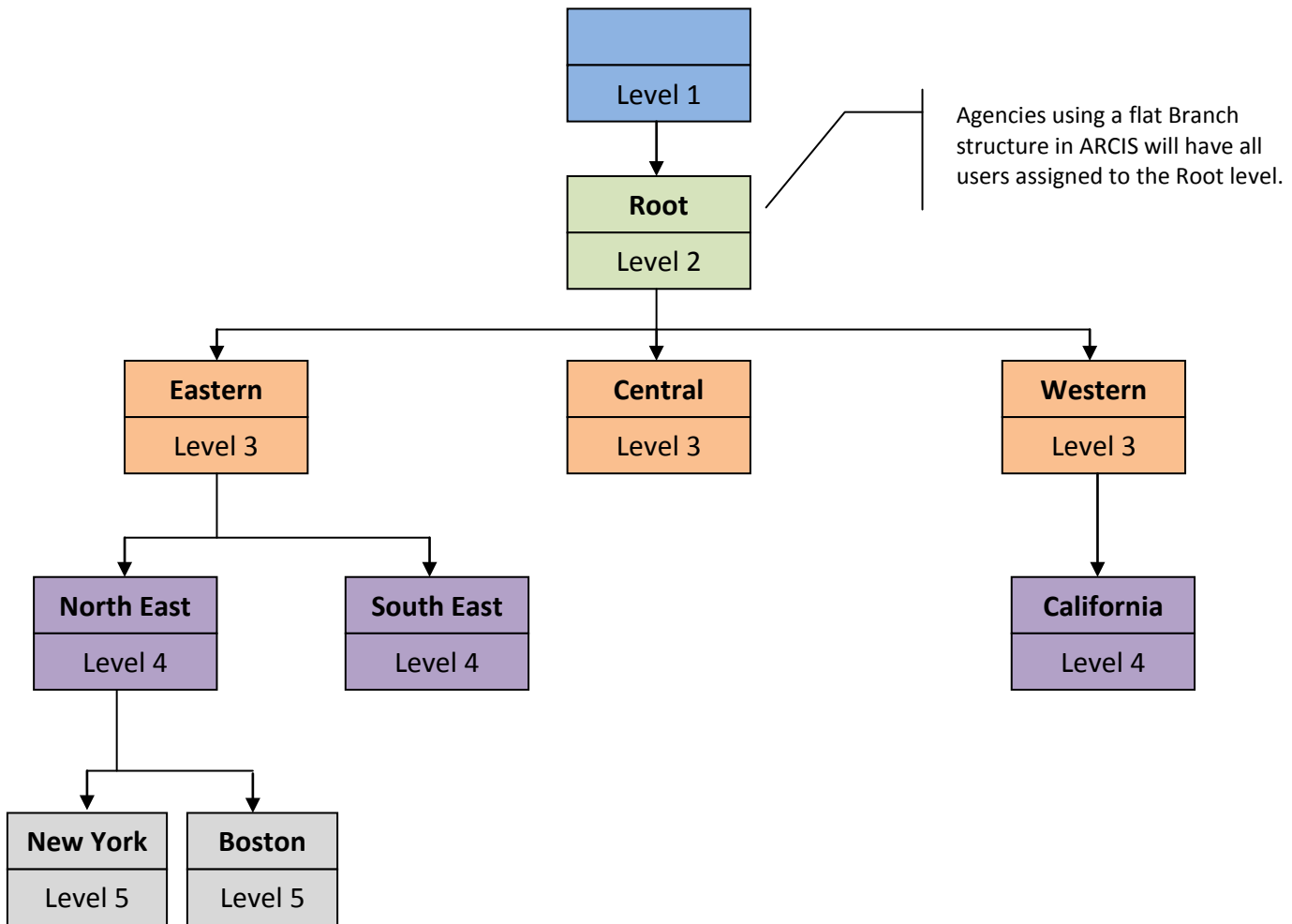


ARCIS User Branch Hierarchical Structure

Within ARCIS, agencies will be set-up with one of the following branch structures.

- **Horizontal Branch Structure:** With a flat, or horizontal, structure agencies will only have access to Level 1 and Level 2 shown below. All users and administrators will be assigned the “Root” branch.
- **Vertical Branch Structure:** Agencies using a vertical branch structure will have levels below the root level as shown below.

For most agencies, the “Branch” field in ARCIS will simply serve as a container to house users. Branch is not part of transaction access or control functionality.



ARCIS New User Application

<small>Archives and Records Centers Information System</small>		ARCIS User Request Form																																																																					
Action Requested		Date of Request <input style="width: 50px;" type="text"/>																																																																					
<input type="checkbox"/> Create new user account. Complete all sections.		<input type="checkbox"/> Modify existing user account. Complete sections required to identify user and indicate needed modification.																																																																					
<input type="checkbox"/> Deactivate existing user account. Complete Section 1, Line 1.																																																																							
1. User Information: The following information is used to identify authorized ARCIS users and will be used as a default value for some fields when submitting Record Transfer and/or Reference Requests.																																																																							
Last Name: <input style="width: 100px;" type="text"/>		First Name: <input style="width: 100px;" type="text"/>																																																																					
MI: <input style="width: 20px;" type="text"/>		Prefix: <input style="width: 50px;" type="text"/>																																																																					
E-Mail: <input style="width: 150px;" type="text"/>																																																																							
Branch/Office: <input style="width: 100px;" type="text"/>		Address: <input style="width: 150px;" type="text"/>																																																																					
Country: <input style="width: 50px;" type="text"/>		City: <input style="width: 50px;" type="text"/>																																																																					
Work Phone #: <input style="width: 100px;" type="text"/>		State: <input style="width: 30px;" type="text"/>																																																																					
		Zip: <input style="width: 50px;" type="text"/>																																																																					
2. Approver Authorization: Check one of the following statements below.																																																																							
<input type="checkbox"/> NO - Records transfers created by user will be approved by a separate approval authority prior to transmission to the Federal Records Center.																																																																							
<input type="checkbox"/> YES - User will approve record transfers created by others OR will submit record transfer he/she creates directly to the Federal Records Center.																																																																							
Do you know of an existing user whose access control and user capabilities can be copied for this user?																																																																							
<input type="checkbox"/> YES - Existing users name <input style="width: 50px;" type="text"/> and e-mail <input style="width: 50px;" type="text"/> (skip section 3 and 4 below)																																																																							
<input type="checkbox"/> NO - (complete all sections below)																																																																							
3. Access Control: Enter access and control criteria for this user.		4. User Capabilities: Check the system capabilities user will possess.																																																																					
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2">Federal Records Centers</th> <th rowspan="2">Primary (check only one)</th> <th colspan="2">Allow Reference</th> <th colspan="2">Allow Records Transfers</th> </tr> <tr> <th>Add</th> <th>Remove</th> <th>Add</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td><input style="width: 100px;" type="text"/></td> <td><input type="checkbox"/></td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td><input style="width: 100px;" type="text"/></td> <td><input type="checkbox"/></td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td><input style="width: 100px;" type="text"/></td> <td><input type="checkbox"/></td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> </tbody> </table>		Federal Records Centers	Primary (check only one)	Allow Reference		Allow Records Transfers		Add	Remove	Add	Remove	<input style="width: 100px;" type="text"/>	<input type="checkbox"/>	+ <input type="checkbox"/>	- <input type="checkbox"/>	+ <input type="checkbox"/>	- <input type="checkbox"/>	<input style="width: 100px;" type="text"/>	<input type="checkbox"/>	+ <input type="checkbox"/>	- <input type="checkbox"/>	+ <input type="checkbox"/>	- <input type="checkbox"/>	<input style="width: 100px;" type="text"/>	<input type="checkbox"/>	+ <input type="checkbox"/>	- <input type="checkbox"/>	+ <input type="checkbox"/>	- <input type="checkbox"/>	<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th>Add or Remove the following capabilities not automatically granted to all users.</th> <th>Add</th> <th>Remove</th> </tr> </thead> <tbody> <tr> <td>Records Transfers 1. CREATE: I can create transfers, and I can edit and track the transfers I created.</td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td>Record Transfers 2. EDIT: I can edit and track transfers for which I am the agency contact.</td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td>Record Transfers 3. APPROVE: I can approve transfers created by others.</td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td>Record Transfers 4. RE-ASSIGN: I can re-assign transfers to a different agency contact or approver.</td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td>Record Transfers 5. PROFILE-SPECIFIC VIEW: I can view all transfers whose properties match those in my profile.</td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> <tr> <td>Record Transfers 6. AGENCY-WIDE VIEW: I can view all transfers from my agency, regardless of their properties.</td> <td>+ <input type="checkbox"/></td> <td>- <input type="checkbox"/></td> </tr> </tbody> </table>		Add or Remove the following capabilities not automatically granted to all users.	Add	Remove	Records Transfers 1. CREATE: I can create transfers, and I can edit and track the transfers I created.	+ <input type="checkbox"/>	- <input type="checkbox"/>	Record Transfers 2. EDIT: I can edit and track transfers for which I am the agency contact.	+ <input type="checkbox"/>	- <input type="checkbox"/>	Record Transfers 3. APPROVE: I can approve transfers created by others.	+ <input type="checkbox"/>	- <input type="checkbox"/>	Record Transfers 4. RE-ASSIGN: I can re-assign transfers to a different agency contact or approver.	+ <input type="checkbox"/>	- <input type="checkbox"/>	Record Transfers 5. PROFILE-SPECIFIC VIEW: I can view all transfers whose properties match those in my profile.	+ <input type="checkbox"/>	- <input type="checkbox"/>	Record Transfers 6. AGENCY-WIDE VIEW: I can view all transfers from my agency, regardless of their properties.	+ <input type="checkbox"/>	- <input type="checkbox"/>																			
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Training Use Only – Not an Official Form (5/11/11)

Sample Introductory e-mail to a New Administrator

Dear (Name of new administrator):

You have been designated as an Administrator for the ARCIS Customer Portal system which enables you to manage users of the system as well as conduct business with NARA's Federal Records Center Program. As such, you now have the ability to:

- 1) Create, modify, and inactivate users of the system.
- 2) Create, edit, approve, reassign, and view records transfers.
- 3) Create and view reference requests.

Depending on the roles, rights, access controls and responsibilities built into your profile, you may not be able to perform some of the functions listed above. Once you have started using the system, should you discover required functionality that you do not have as part of your ARCIS profile, please contact me to discuss.

The ARCIS url is <http://eservices.archives.gov/arcis>

Your User ID is XXXXXXX.

For security purposes, your password will be sent to you in a second e-mail.

If you have any questions, please contact me.

Sample Introductory e-mail to a New User

Dear (Name of new user):

You have been designated as a user of the ARCIS Customer Portal system which enables you to conduct business with NARA's Federal Records Center Program. As such, you now have the ability to:

- 1) Create, edit, approve, reassign, and view records transfers.
- 2) Create and view reference requests.

Depending on the roles, rights, access controls and responsibilities built into your profile, you may not be able to perform some of the functions listed above. Once you have started using the system, should you discover required functionality that you do not have as part of your ARCIS profile, please contact me to discuss.

The ARCIS ~~url~~ is <http://eservices.archives.gov/arcis>

Your User ID is XXXXXXXX.

For security purposes, your password will be sent to you in a second e-mail.

If you have any questions, please contact me.

Sample Temporary Password and Instructions e-mail to a New Administrator or User

Dear (Name of new administrator or new user):

This e-mail provides you with your **temporary** ARCIS password and some instructions that you should follow as soon as possible.

The ARCIS [url](http://eservices.archives.gov/arcis) is <http://eservices.archives.gov/arcis>

Your User ID was sent to you in a previous e-mail.

Your temporary password is XXXXXXXX!

After logging in, you should:

- 1) Change your password. Passwords must be a minimum of 8 characters, contain at least 1 upper case character, 1 lower case character, 1 number, and 1 special character (but not '&' or '!').
- 2) Set up a Challenge Answer to your selected Challenge Question. Should you forget your password and contact the ARCIS Help Desk for assistance, they will require a correct response from you.
- 3) Inspect your personal profile. Modify your Contact Information as necessary: name, address, phone information. It is not necessary to have your agency's name in the Address 1 or Address 2 fields. Physical [street](#) address information only, please.
- 4) Inspect your assigned access controls and capabilities. Should you discover required functionality that you do not have as part of your assigned ARCIS access controls or capabilities, please contact me to discuss.

Should you have profile, agency operational or procedural questions regarding the use of the ARCIS customer portal, please contact me directly. For performance issues, password resets, or minor portal usage questions, contact the ARCIS Help Desk:

- E-mail: arcishelp@nara.gov
- Telephone: 314-801-9300
- Hours: Monday to Friday
7 [a.m.](#) to 5:30 p.m. (Central Time)

If you have any questions, please contact me.

Help Desk Information

The **ARCIS Help Desk** can assist you with any ARCIS-related issues including logging in, resetting your password, getting training, and more.

Contact the ARCIS Help Desk:

- **E-mail:** arcishelp@nara.gov
- **Telephone:** 314-801-9300
- **Hours:** Monday to Friday
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Training Tutorials / Videos / Manuals Information

The ARCIS Training Resource Center is your source for:

- Training Tutorials
- Training Videos
- Training Manuals

Navigate to www.archives.gov/frc/arcis