



Data Tracking System (DTS)

User Manual

<http://dts.fws.net>

<https://dts.fws.gov>

Correspondence Control Unit
Telephone: 202-208-7535

April 2008

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ACCESSING THE DTS SYSTEM (Use Internet Explorer 6)

*Please remember to deactivate any Pop-up Blocker software before using the application.

- Step (1)** Go to the following link:
http://dts.fws.net (intranet SWAN access)
https://dts.fws.gov (internet access—from home)
- Step (2)** Enter your email address and Active Directory password and click OK.
- Step (3)** Press Enter or click Continue at the Welcome Page
- Step (4)** If you have more than one User Account, select the one you want to use and press Enter or click Continue.

Select Login

Data Tracking System (DTS)
U.S. Fish & Wildlife Service
Division of Information and Resource Technology Management

You have multiple DTS User Accounts. Please select the account you wish to use for this session.

Account	Office	User Group
<input checked="" type="radio"/> MARGIE NASH	CCU	Administrator
<input type="radio"/> MARGIE NASH2	AFHC	Staff

Continue

CONTROL CENTER**Navigation Bar**

1. *Home* button takes the user to the Control Center
2. *Back* button returns the user to the previous screen
3. *Forward* button takes the user to the next screen
4. *Refresh* button reloads the screen
5. *Add New Record* button takes the user to the Main Information Screen
6. *Search* button takes the user to the Simple Search Screen
7. *Predefined Process* button to create/edit predefined routings
8. *Reports* button takes the user to the Reports Screen to create and schedule reports



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- 7.
- 8.

Control Center Inbox ▾

System Messages

The DTS (Data Tracking System) is currently online.

Tip of the Week

March 24, 2008

If your office is returning/reviewing a package and you are returning the package to the originating office for revisions or more information, please add a routing comment so the originating office knows why the package is being returned.

Also, remember to add a "task assigned" date for the office you are assigning the package to. If you don't assign a date, the folder won't show in their inbox!!

Select User Account

MBNash - AFHC ▾

Quick Search

FWS DTS National Database ▾

DCN:

ES No:

Routing InBOX

Record	DCN	Task Assigned	Task Due Date	Last Name	Subject
	035839	03/28/2008	N/A	Kodis	Southern Sea Otter SAR
	035819	03/28/2008	N/A	AFHC	FY 2007 Great Lakes Fish & Wildlife Restoration Act Proposals
	035782	03/25/2008	04/01/2008	Service Directorate	Updating Office Acronyms
	035745	03/25/2008	N/A	D	FY2008 April Directorate Meeting Materials
	035732	03/20/2008	N/A	AFHC	FY2007 Great Lakes Fish & Wildlife Restoration Act Proposals
	035671	03/20/2008	N/A	ABMO	Reimbursement for Use of Privately-Owned Conveyances (FTR Amendment 2008-02)
	035336	03/14/2008	N/A		Summary of Regional Concurrence on Proposed NFPP Allocation Methodology
	035218	03/05/2008	03.07.2008	Regional Directors - Regions 1-8	ER 07/768 - FEIS for the National Forest System Management Planning
	032632	10/30/2007	N/A	Service Directorate	Revisions to the Environmental Review Procedures

System Messages

The System Manager provides the user with the current status of the DTS.


Tip of the Week

Check here for reminders and suggestions on how to make the DTS work better for you.

Select User Account

If you have more than one account in DTS, you can change to the another account by selecting from the drop down box. The Routing InBOX will refresh with the records associated with the account selected.

Quick Search



If you know the DCN or ES number of the record you want to view, you can do a quick search by entering the number in the appropriate field and pressing Enter or clicking the  button.

Routing InBOX

Provides the user with the initial view of current records that are associated with the user's logged in account (Orig. Office). These records are described by the following:

- DCN
- Task Assigned Date
- Task Due Date
- Last Name
- Subject

From your Routing InBOX, you may click on the:

- Record button  to access a record assigned to your office and take appropriate action
- Up/Down arrows  to reverse order of presentation



Record	DCN	Subject	Input	Due Date	Last Name	Tasks Complete	Assigned To	Assigned	Task Due	Close DCN
	034719	Pollution at Beach Preserve of Hacienda la Esperanza	01/17/2008	02/22/2008	Reyes	1 of 12	R4-ARD-ES	01/17/2008	02/20/2008	
	034718	Report to Congress on the Upper Colorado and San Juan River Basin Recovery Programs	01/17/2008	01/28/2008	Richardson	8 of 10	FW	01/29/2008	N/A	
	034697	Framework for Bison Conservation in the U.S.DOI	01/16/2008	01/26/2008	FW	34 of 34				
	034685	Experienced Volunteer Availability for the NBR thru the Spring	01/16/2008	01/31/2008	Friends of the National Bison Range	3 of 6	R6	01/16/2008	01/30/2008	

Routing OutBOX

In the upper right hand corner of the Control Center, you can select your Routing OutBox from the dropdown menu. This provides the user with all records the user's Originating Office has entered that are open. These records are described by the following:

- DCN
- Subject
- Input Date
- Due Date (if any)
- Last Name
- Number of Tasks Completed
- Current Office Assigned To
- Date Task Assigned
- Task Due Date
- Close DCN

If all tasks have been completed and the record is still open (no date in the Closed Date field), there will be a yellow folder in the Close DCN column of the Routing OutBox. Click on the folder and the system will automatically enter a date in the closed date field of the record.

ADD A RECORD

The screenshot shows the 'ADD A RECORD' form in the DTS Database-FWS application. The interface includes a navigation bar at the top with icons for Home, navigation, refresh, add, search, and help. Below the navigation bar, the application title 'DTS-Database-FWS DTS-Items=32889' and a 'Help' button are visible. The form itself is divided into several sections: a search bar for DCN and ES No; a main data entry section with fields for DCN (034851), Input Date (04/01/2008), Orig. Office (CCU), In/Out (O-Outgoing document), Inc Date, Due Date, Action (4-Signature), External No, Doc Type (M-Memoranda), ES No, Sig Level (D-Director), ES Due Date, Subject (New DTS User Manual), and Synopsis; and a bottom section with fields for Ack Date, Xref, Sign Date, Interim Date, Medium (Select Medium), Signed By, Closed Date, Lock Record, and Work Flow Report Setup.

Step (1) Click the Add New Record button  on the main Navigation Bar. You are now on the Main Information Screen.

Step (2) The FWS National Database is the default. You can select a different database from the dropdown menu (right side of screen).

Step (3) Fill in all appropriate fields. Underlined field labels indicate fields that you must complete.

Step (4) Click the Lock Record checkbox (optional).

Step (5) Click the Save button  to save your record.

Field Definitions:

DCN - A number assigned by the system automatically when you save the record. You cannot enter any information in this field.

Input Date - Required field - Populates with today's date; press the calendar button and select appropriate date if different than today's date.

Orig. Office - The system will insert your office when you save the record. You cannot enter information in this field.

In/Out - Required field - Incoming/Outgoing. Incoming document is one that is coming into the Service (your office) for response or other action. An outgoing document is one that originates within the Service that is not in response to an incoming. Select appropriate entry from dropdown.

Inc. Date - Date on incoming letter/document. Press the calendar button to select appropriate date. Do not enter a date for an outgoing document.

Due Date - Due date for lead office is the date by which all action must be completed. Press the calendar button to select appropriate date.

Action - Required field -This is the overall action for the document; select from the dropdown list.

Doc. Type - Required field - Document Type. Select from dropdown list. Be as specific as possible; e.g., for a memorandum on competitive sourcing, select "Competitive Sourcing," not "Memoranda."

Sig. Level - Select appropriate signature level from dropdown list.

External Number – Use for another number related to your document; e.g., RIN for Federal Register documents; GAO number for audits, etc.

ES No. – Control number assigned by Executive Secretariat

ES Due Date - Due date assigned by Executive Secretariat; press the calendar button to select appropriate date.

Subject - Required field. Enter brief subject of document. This field will show up on reports and space is limited. Be specific so you will be able to locate it in a search. Do not put "Travel Authorization," or "Request for Actual Expenses," etc., as your subject. If you are looking for a specific action, these subjects will not help you find it. Better subjects would be:

Travel Authorization - John Doe - Phoenix, AZ – 5-22-07
Actual Expenses - AFWA - Washington, D.C. – 3-15-07

Synopsis - Further explanation of subject, if needed. Do not carry over text from Subject to Synopsis.

Ack Date - If an acknowledgement letter is sent, enter date by selecting calendar.

Interim Date - If an interim response is sent, enter date by selecting calendar.

XRef - Cross Reference - Enter DCNs of other documents that pertain to this record. For example, if you received a previous letter from the same addressee on the same subject, enter the DCN of the first letter in this field.

Medium – Select how you received the letter/document from the dropdown list.

Signed Date - Date document is signed. Press the calendar button to select appropriate date.

Signed By - Name of person who signed the document.

Closed Date – Date record was completed. Press the calendar button to select appropriate date.

The screenshot displays the 'DTS-Database-FWS' interface with 32889 items. The main form includes fields for DCN (034851), Input Date (04/01/2008), Orig. Office (CCU), In/Out (O-Outgoing document), Inc Date, Due Date, Action (4-Signature), External No, Doc Type (M-Memoranda), ES No, Sig Level (D-Director), ES Due Date, Subject (New DTS User Manual), Synopsis, Ack Date, Xref, Sign Date, Interim Date, Medium (Select Medium), Signed By, and Closed Date. There are checkboxes for 'Lock Record' and 'Work Flow Report Setup'. Below the main form is an 'Addressee' panel with tabs for 'Name', 'Address', and 'Office', and a search field for 'Search by Last Name'.

Please add an Addressee to continue.
 The Addressee is the person or office that the action item was received from or is addressed to. If you are entering this item for your own record keeping, you may enter yourself as the Addressee.
[Show me how](#)

ADDRESSEE

Add an Addressee

Enter one or more addressees and the appropriate address information. You can also select an office as an addressee.

Incoming document – The addressee is the name of the person who signed the incoming correspondence or acronym of the Service or Departmental office.

Outgoing document – The addressee is the name of the person to whom the response is addressed or the acronym of the Service or Departmental office.

Use office acronyms rather than names for documents to/from offices within the Service and the Department; e.g., for memorandum addressed to the Regional Director, Region 3, use "R3" as the addressee. Do not use "Robyn Thorson."


Use the following as last names:


- Service Directorate
- Federal Register
- Clearance Record
- News Release

Select A Name




Forward and Back buttons at the top of the Addressee screen will enable you to navigate within the Addressee screen.

Step (1) After entering the core information for your record, scroll down to the Addressee screen. Enter the last name of the addressee in the Search by Last Name field. Click on the Search button  in the Addressee screen. If the correct name is listed, click on the Last Name and the addressee information will appear in the Addressee screen; also the Address form will fill in.

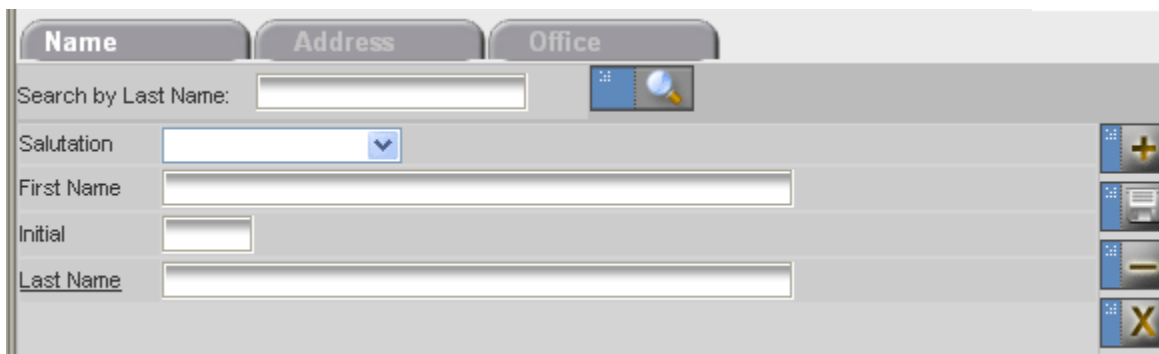
Note: If the correct name is not listed, click the Go Back button  (see Add a Name, below).

Step (2) Click the Save Addressee button  (right side of addressee screen) to save the addressee.

Step (3) To enter address information, click the Address tab and enter appropriate data. Click the Save Address button  (right side of addressee screen) to save the address information.

Add A Name

Step (1) If your lookup from Step (1) above does not produce the correct name, click the Go Back button to return to the Addressee screen. Fill in the appropriate fields, Last Name is required. Click the save button on the right side of the Addressee Screen.



Add
Save
Cancel
Delete

Step (2) Click on the Address tab at the top of the Addressee Screen and fill in all appropriate fields. Click the save button on the right side of the Addressee Screen to save the address information.

Name	Address	Office
Addressee Title	<input type="text"/>	
Organization	<input type="text"/>	
Address	<input type="text"/>	
City	<input type="text"/>	State <input type="text"/>
Zip	<input type="text"/>	Country <input type="text"/>
Tel	<input type="text"/>	Tel ext <input type="text"/>
Fax	<input type="text"/>	
E-mail	<input type="text"/>	
Constituent	<input type="text"/>	Cong. State <input type="text"/>

Select An Office

Step (1) Click the Office tab at the top of the Addressee Screen. In the Office Lookup field, type the office or first few letters of the office and press the ellipsis button . Select the appropriate office.

Step (2) Click the Save Addressee button on the right side of Addressee screen to save the office acronym.

If the office is outside of the FWS, click the dropdown arrow to select the appropriate Departmental bureau.

Name	Address	Office
Office Lookup	<input type="text"/>	
Office Lookup	<input type="text"/>	
		<input type="text"/> <ul style="list-style-type: none"> DOI FWS NPS

Note: You cannot add an office that is not in the office list. To add an office, call the Correspondence Control Unit at 202-208-7535.

TREE VIEW

After you save the Main Information and the Addressee, the Tree will refresh with the following icons at the top of the Tree:

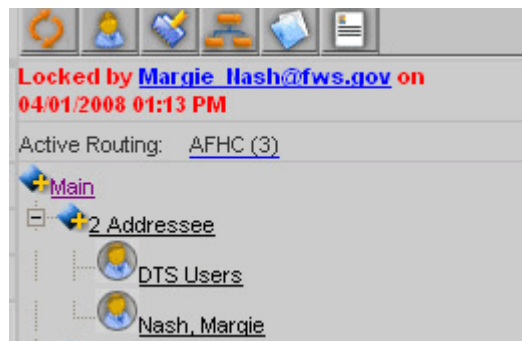


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1. The *Refresh* button will refresh the tree
2. The *Add Addressee* button will open the Addressee Screen at the bottom left
3. The *Comment* button will open the Overall Comments Screen
4. The *Add Routings* button will open the Routing Screen at the bottom left
5. The *Attachments* button will open the Attachments Screen at the bottom left
6. The *Control Slip* button will allow the user to create a Control Slip

RECORD LOCKING

On the bottom-middle of the Main Information Screen, there is a record lock checkbox. Check this box while you are working with a record so the record cannot be overwritten by another user. If you need to modify a record that has been locked by another user, click on the link at the top of the Tree to send the user an email asking the user to unlock the record.

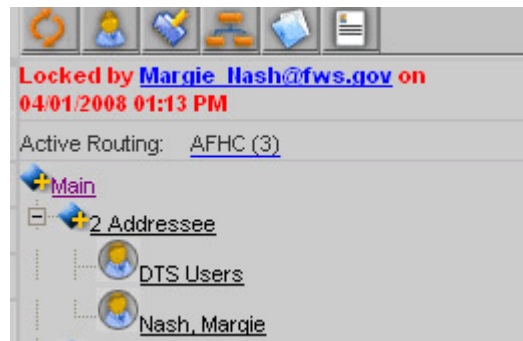


In your InBOX there is an icon of a lock if a record assigned to your office is locked. A green lock indicates the record was locked by you, and a red lock indicates the record was locked by another user.

Record	DCN	Task Assigned	Task Due Date	Last Name	Subject
	034851	04/01/2008	04/02/2008	DTS Users, Nash	New DTS User Manual
	033752	01/23/2008	01/15/2008	Service Directorate	Implementing the National Fish Habitat Action Plan under the FY 2008 Continuing Resolution
	032632	10/30/2007	N/A	Service Directorate	Revisions to the Environmental Review Procedures

ACTIVE ROUTING QUICK-VIEW

Below the Record Locking email link is a quick view of the open routing(s) and the assigned task (e.g., AFHC (3) = assigned to AFHC for surname). If there is more than one open routing, there will be a dropdown box. Clicking on the active routing will open that routing in the Routing Screen.




WORK FLOW REPORT SETUP


On the bottom-middle of the Main Information Screen, there is a checkbox to set up a Work Flow Report. Use the work flow to keep track of individual records.

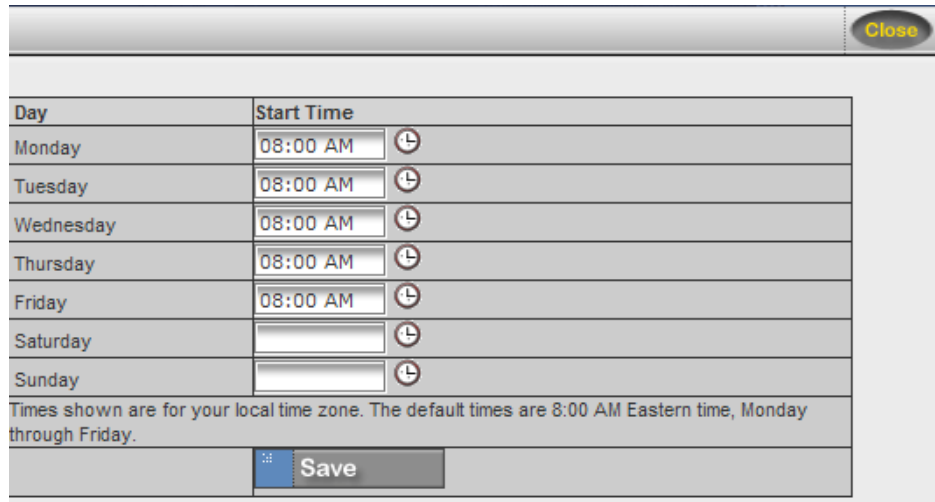
Xref	<input type="text"/>	Sign Date	<input type="text"/>
Medium	Select Medium	Signed By	<input type="text"/>
<input checked="" type="checkbox"/>	Lock Record	<input checked="" type="checkbox"/>	Work Flow Report Setup








To set up a Work Flow Report:

Step (1) Check the box.

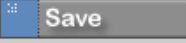
Step (2) Click on the white envelope and select the names of those you want to receive reports on this particular record. Click the  button and close the screen.

Step (3) Click on the red clock and select the day and time to receive your report. Click the  button and close the screen.



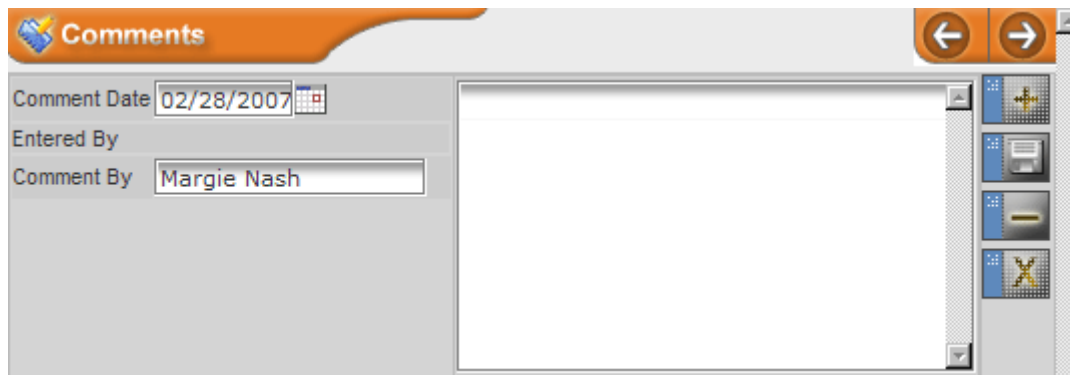
Day	Start Time
Monday	08:00 AM 
Tuesday	08:00 AM 
Wednesday	08:00 AM 
Thursday	08:00 AM 
Friday	08:00 AM 
Saturday	
Sunday	


Times shown are for your local time zone. The default times are 8:00 AM Eastern time, Monday through Friday.



Step (4) When you no longer wish to receive the Work Flow Report, open the record and uncheck the checkbox.

COMMENTS



Step (1) In your current record, click the Comments button  located over the Tree View or click on the Comment heading in the tree. The Comments Screen will display below the Main Information Screen.

Step (2) The *Comment Date* and *Comment By* fields are pre-populated with today's date and the user's name; enter your comment in the Comment box. *Entered By* is automatically entered by DTS upon saving. (If the comment is someone's other than the user, enter that person's name in the *Comment By* field.)


Step (3) Click the Save Comment button  on the right side of Comments Screen to save the comment.

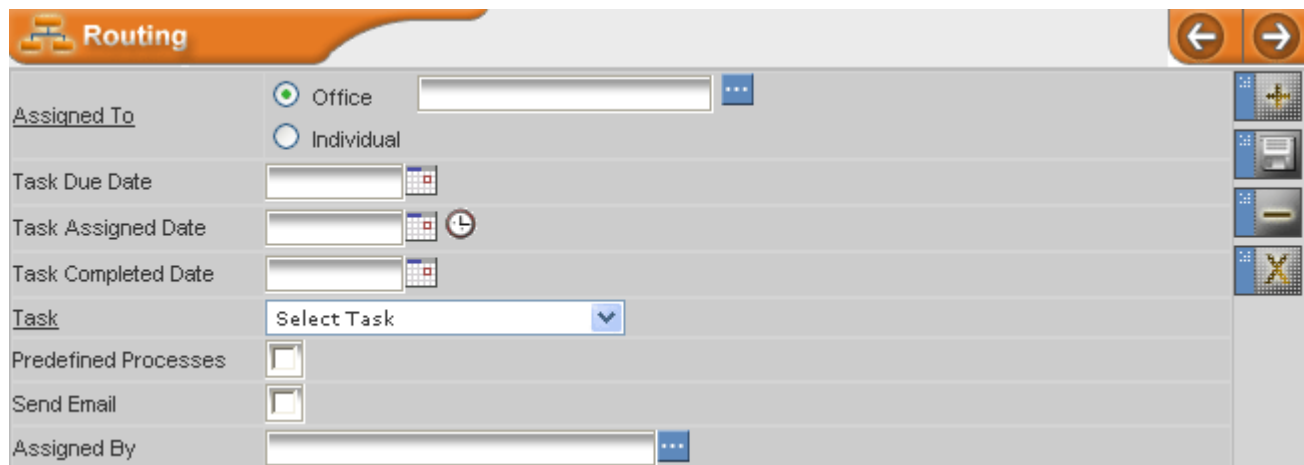
Note: These comments pertain to the overall record. See Routing Comments.

ROUTING


Note: The DTS saves the first routing to the originating office when the Addressee Information is saved so that you can make further modifications to your record. If the document will remain in your office for action, you must remove the date in the Task Completed Date field and save the routing. This will indicate that the document is in your office for action, and it will show in your Routing InBOX.

Add a Routing


Step (1) In your current record, click the Routing button  located over the Tree View or click on the Routing heading in the tree. The Routing Screen will display below the Main Information Screen.



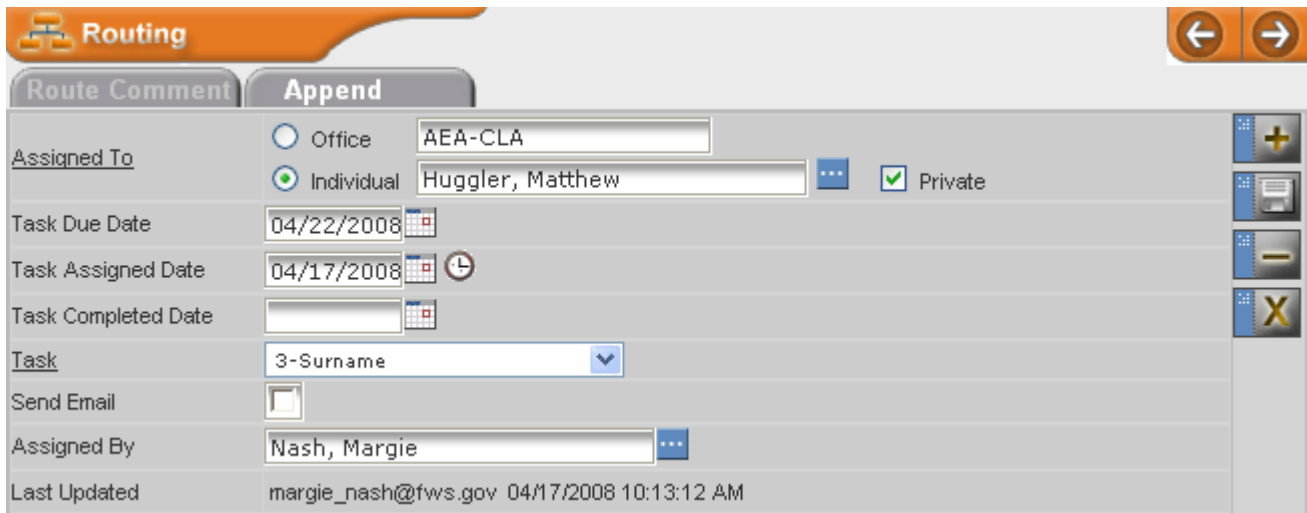
Step (2) Input the following information:

- **Assigned To** (required field): Type the first few letters of the office acronym and click the Ellipsis button  to select office
- **Task Due Date:** Enter due date for Assigned To office
- **Task Assigned Date:** Enter date only when document is routed to Assigned To office
- **Task Completed Date:** Assigned To office enters date when action is completed
- **Task** (required field): Select appropriate task from dropdown list
- **Predefined Processes:** Click this box if you wish to use a Predefined Process (see page 22)
- **Send Email:** Click this box if you wish to send an email to the Assigned To office
- **Assigned By:** DTS will enter automatically.

Step (3) Click the Save Routing button  on the right side of the Routing Screen to save the routing.


Step (4) To add additional routings, click the Add Routing button  on the right side of the Routing Screen and repeat Steps (2) and (3).

Routing to an Individual




The screenshot shows the 'Routing' screen with the following fields and values:

Field	Value
Assigned To	Office: AEA-CLA Individual: Huggler, Matthew
Task Due Date	04/22/2008
Task Assigned Date	04/17/2008
Task Completed Date	
Task	3-Surname
Send Email	<input type="checkbox"/>
Assigned By	Nash, Margie
Last Updated	margie_nash@fws.gov 04/17/2008 10:13:12 AM

Step (1) In your current record, click the Routing button  located over the Tree View or click on the Routing heading in the tree. The Routing Screen will display below the Main Information Screen.

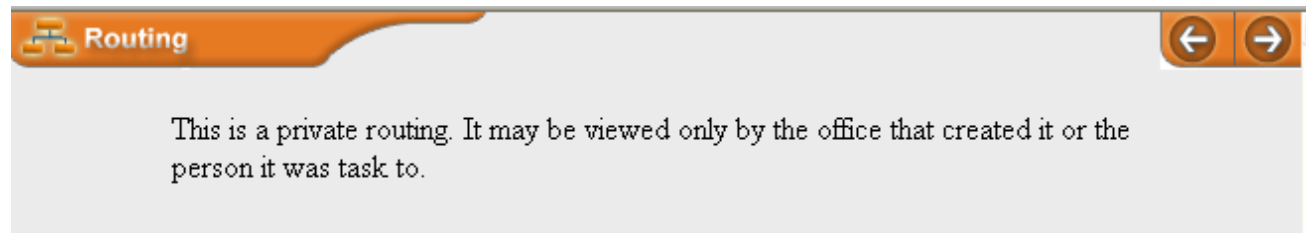
Step (2) Select Individual button in the Assigned To field, enter the individual's last name, and press the ellipsis to select the individual.

Step (3) Check the Private box if you do not want the routing viewed by other offices.

Step (4) Fill in the remaining fields and click the Save Routing button  on the right side of the Routing Screen to save the routing.

Note: A routing to an individual shows in the individual's InBOX on the Home Screen, **not** in the individual's office InBOX.

If you click on a private routing to an individual that your office did not create, you will not be able to view it. You will see the following warning.



Routing Comment

Step (1) Click on the Routing in the Tree that you want to add a comment.

The screenshot shows the 'Routing' screen with the 'Route Comment' tab selected. The form contains the following fields and values:

Assigned To	<input type="radio"/> Office	AEA-CLA	<input checked="" type="radio"/> Individual	Huggler, Matthew	<input checked="" type="checkbox"/> Private
Task Due Date	04/22/2008				
Task Assigned Date	04/17/2008				
Task Completed Date					
Task	3-Surname				
Send Email	<input type="checkbox"/>				
Assigned By	Nash, Margie				
Last Updated	margie_nash@fws.gov 04/17/2008 10:13:12 AM				

Step (2) Click on the **Route Comment** tab in the Routing screen.

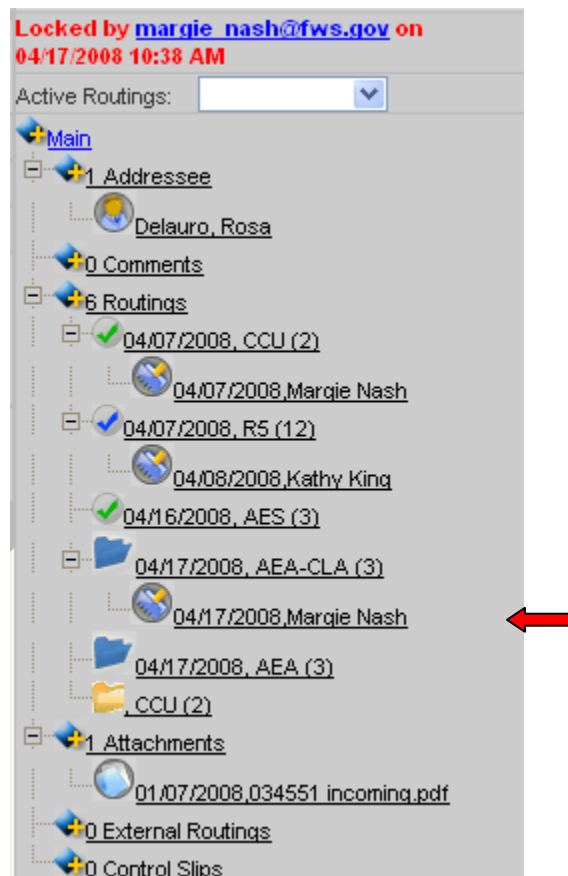
The screenshot shows the 'Comments' screen with the following fields and values:

Comment Date	04/17/2008	Comment	Please review, edit if needed, and return by the due date.
Entered By	Margie Nash		
Comment By	Margie Nash		

Step (3) The *Comment Date* and *Comment By* (name of person making the comment) fields are pre-populated with today's date and the user's name; type your comment in the Comment box. *Entered By* is automatically entered by DTS upon saving.

Step (4) Click the Save Comment button  on the right side of Comments screen to save your routing comment.


Step (5) The Tree will automatically refresh displaying your comment.




Insert A Routing Between Two Existing Routings


If you need to insert a routing between two routings in your routing list:

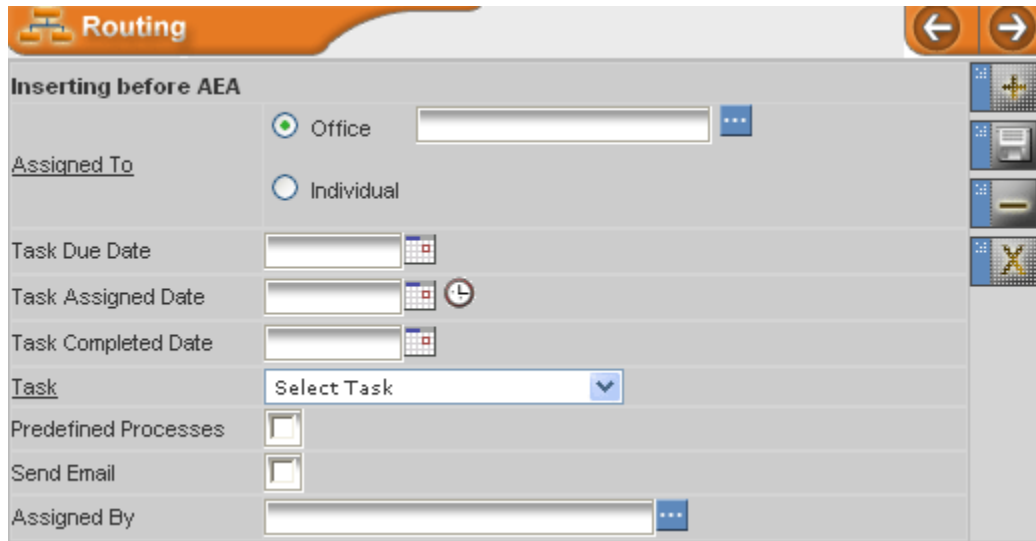
Step (1) Click the routing that is below where you want to insert your new routing.

Step (2) In the Routing screen click on the  tab.

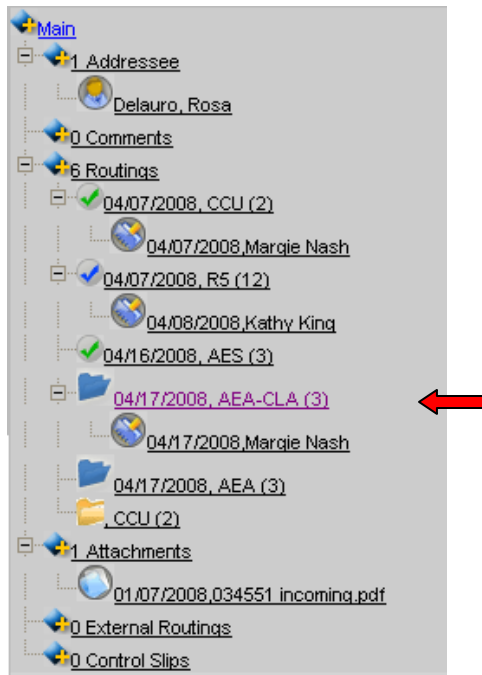
Step (3) Input the following information:

- Assigned To (required field): Type the first few letters of the office acronym and click the Ellipsis button  to select office
- Task Due Date: Enter due date for Assigned To office
- Task Assigned Date: Enter date only when document is routed to Assigned To office
- Task Completed Date: The Assigned To office enters the date when the action is completed

- Task (required field): Select appropriate task from dropdown list
- Send Email: Click this box if you wish to send an email to the Assigned To office
- Assigned By: DTS will enter automatically or you can click Ellipsis button  to select name



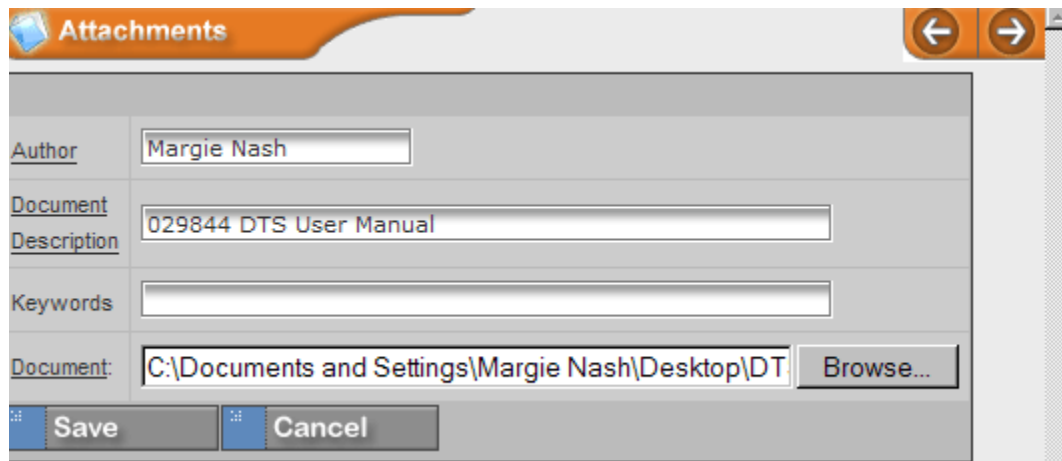
Step (4) Click the Save Routing button  on the right side of Routing screen to save your inserted routing.



Step (5) The Tree will automatically refresh displaying your inserted routing.

ATTACHMENTS

Upload an Attachment



The screenshot shows a web form titled "Attachments". The form has a header bar with a folder icon and the word "Attachments", and navigation arrows on the right. The form fields are as follows:

Author	<input type="text" value="Margie Nash"/>
Document Description	<input type="text" value="029844 DTS User Manual"/>
Keywords	<input type="text"/>
Document	<input type="text" value="C:\Documents and Settings\Margie Nash\Desktop\DT"/> <input type="button" value="Browse..."/>


At the bottom of the form are two buttons: "Save" and "Cancel".

Step (1) Click the Attachment  button located over the Tree View or click on the Attachments heading in the tree.


Step (2) Click the  tab in the Attachments Screen.

Step (3) Input the following information:

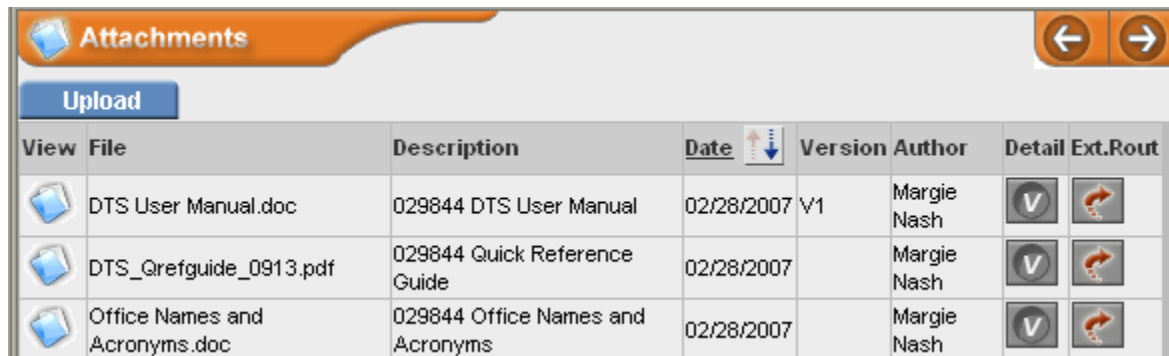
- Author (required field): Type name of author
- Document Description (required field): Type brief description of file
- Key Words: Type keywords (not required)
- Document (required field): Click the BROWSE and locate the file you want to attach

Step (4) Press the  button, and you will be presented with a confirmation page stating the following:

- File Name: The name of the file you uploaded
- File Size: The kilobyte size/count of the uploaded file
- Content-Type: The type of file uploaded


Step (5) Click the  button.

Open An Attachment



View	File	Description	Date	Version	Author	Detail	Ext.Rout
	DTS User Manual.doc	029844 DTS User Manual	02/28/2007	V1	Margie Nash		
	DTS_Qrefguide_0913.pdf	029844 Quick Reference Guide	02/28/2007		Margie Nash		
	Office Names and Acronyms.doc	029844 Office Names and Acronyms	02/28/2007		Margie Nash		

Step (1) Click on the Attachments heading in the tree. The Attachments screen will display below the Main Information screen.

Step (2) Click on the Attachment  button in the View column of the document you want to open. You will be presented with the options of Open or Save the document.

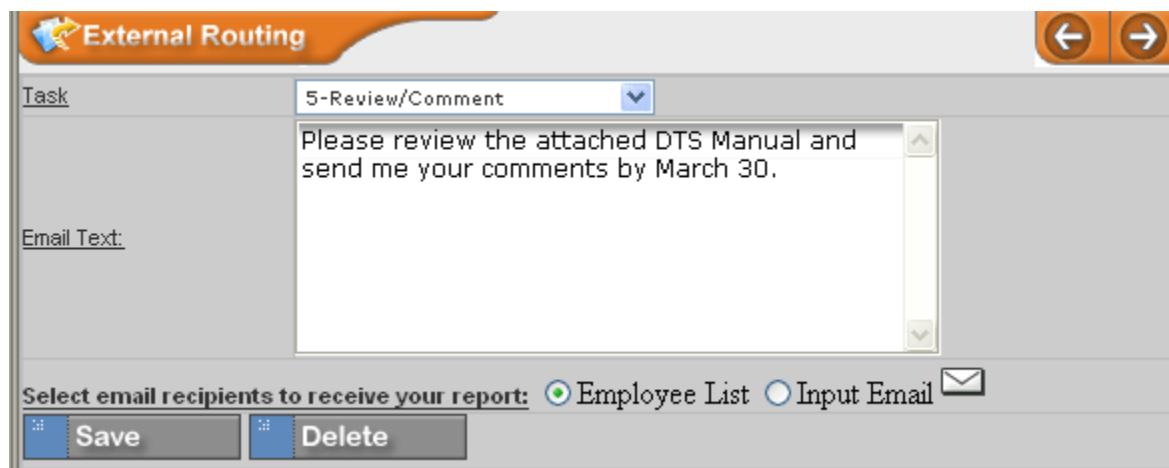
Step (3) You can open the document to print or you can download the document to your computer.

External Routing of an Attachment

An external routing is used to send a document to someone who does not have access to the DTS.

Step (1) Click on the Attachments heading in the Tree View.


Step (2) Click on the External Routing  button to the right of the document you wish to send.



External Routing

Task: 5-Review/Comment

Email Text: Please review the attached DTS Manual and send me your comments by March 30.

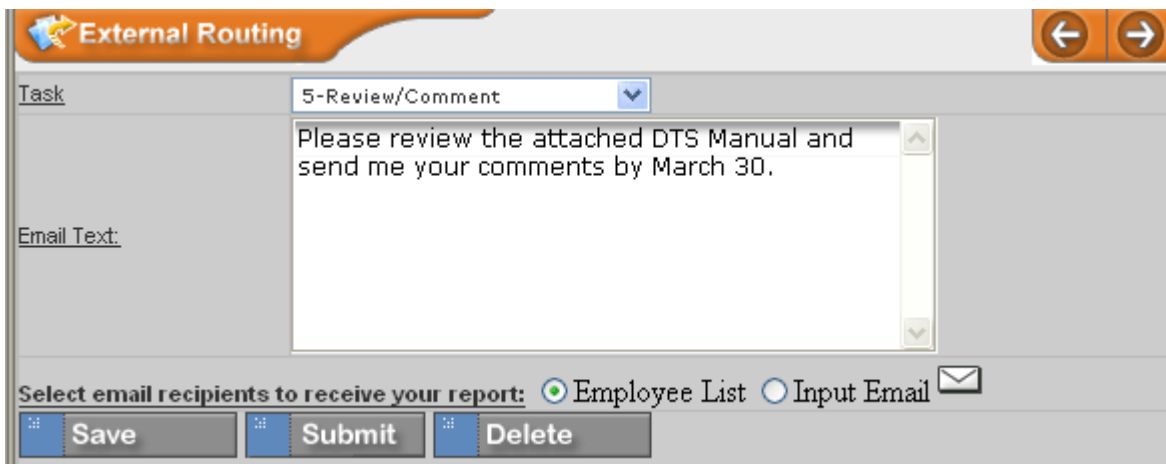
Select email recipients to receive your report: Employee List Input Email 

Step (3) Select the task from the dropdown menu and enter the text to be sent with your email.

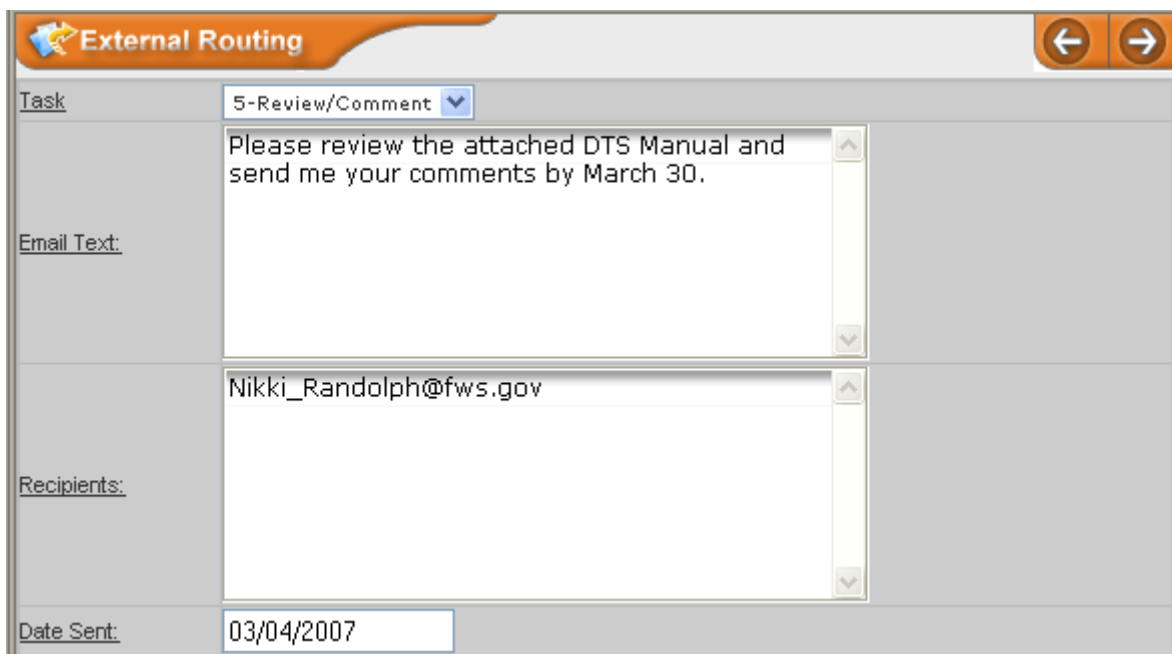
Step (4) Select recipients from the Employee list or Input Email address.

Step (5) Click the  button.

Step (6) Click the  button.

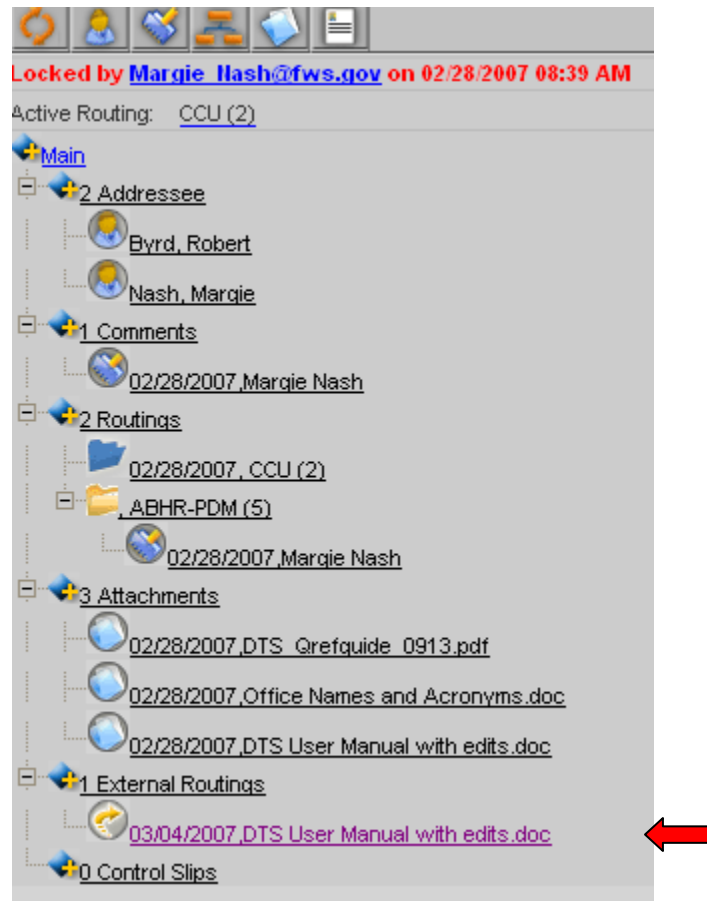


The screenshot shows the 'External Routing' form. At the top, there is a title bar with a gear icon and the text 'External Routing', and two navigation arrows (left and right). Below the title bar, there is a 'Task' dropdown menu set to '5-Review/Comment'. The 'Email Text' field is a large text area containing the text: 'Please review the attached DTS Manual and send me your comments by March 30.'. Below the text area, there is a section for 'Select email recipients to receive your report:' with two radio buttons: 'Employee List' (which is selected) and 'Input Email'. At the bottom of the form, there are three buttons: 'Save', 'Submit', and 'Delete'.




The screenshot shows the 'External Routing' form in a different state. The 'Task' dropdown menu is still set to '5-Review/Comment'. The 'Email Text' field is the same as in the previous screenshot. The 'Recipients' field is now a list box containing the email address 'Nikki_Randolph@fws.gov'. The 'Date Sent' field is a text box containing the date '03/04/2007'. The 'Save', 'Submit', and 'Delete' buttons are still present at the bottom.

Step (7) The Tree will automatically refresh displaying your External routing



CONTROL SLIP

Note: To generate a Control Slip, you must have the record showing in the Main Information Screen.

Step (1) In your current record, click the Control Slip button  located in the Tree View or click on the Control Slips heading in the tree.

Step (2) If you want to include comments on the Control Slip, type the comments in *Comments* block and press the Generate Control Slip button. If you do not wish to include comments, just press the Generate Control Slip button.

Control Slip [←] [→]

DCN: 034551

Comments: Type comments to print on the control slip in this field

[Generate Control Slip]

Step (3) Press the View Control Slip button to view the PDF generated Control Slip.

Control Slip [←] [→]

DCN: 034551

[View Control Slip] [New Control Slip] [Versions]

The Control Slip is automatically attached to your record. If you change or add additional routings, you will need to generate a new one.

FISH AND WILDLIFE SERVICE
DOCUMENT TRACKING CONTROL SLIP
 FWS Form 3-2180
 Attach to front of folder

Date: 04/17/2008

DCN: 034551		ES No:
Orig Office: CCU	Input Date: 01/07/2008	Addressee: Rosa DeLauro
Due Date: 01/25/2008	Signature Level: D	
Subject: Flying prower		

Comments:
Type comments to print on the control slip in this field

Task Codes:


0 - Prepare Draft Reply	5 - Review/Comment	11 - Simultaneous Summaries
1 - Prepare Reply	6 - Revise	12 - Email Draft Reply
2 - Appropriate Action	7 - Obtain Additional Comments	13 - Advance Read
3 - Sumame	8 - Other - See Comments	14 - File
4 - Signature	9 - Mail/Distribute	15 - For Your Information
	10 - Finalize	16 - Sumame through DTS

Routing:

Assigned To	Task	Assigned Date	Due Date	Completed Date
CCU	2 - Appropriate Action	04/07/2008		04/07/2008
ES	12 - E-mail Draft Thru DTS	04/07/2008	04/16/2008	04/16/2008
ABS	3 - Sumame	04/16/2008	04/17/2008	04/16/2008
ABA	3 - Sumame	04/17/2008	04/21/2008	
CCU	2 - Appropriate Action			

PREDEFINED PROCESSES

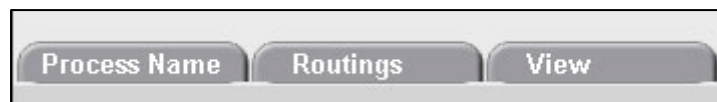
Create A Predefined Process

Step (1) Press the Manage Predefined Process button  located on the Navigation Bar.

Step (2) *Required*, type a Description of your process in the Description field.

Step (3) *Optional*, click Private Process checkbox for your use only, if desired.

Step (4) Click the  button. You will see the following tabs:




Step (5) Click on the Routings tab.

Step (6) Select an office, task, and the anticipated turnaround days (turnaround days is *optional*).

Note: Do not include your office as it is automatically added when you save your record.


Step (7) Click the  button.

Step (8) Click the  button to add another routing to your predefined process.


Step (9) Repeat steps 6 through 8 for each routing in your process. To view your Process, click on the View tab. Ensure your routings are in the desired order.



Add A Predefined Process

Step (1) Select the Add Routing  button from the Tree or click the Routings heading in the tree.

Step (2) Click the Predefined Processes checkbox in the Routing screen and select a process from the dropdown list.

Step (3) Click the Save Routing button  on the right side of Routing Screen to save your Predefined Process. The Tree will automatically refresh displaying your predefined routings.

Note: You can use the Predefined Process for making multiple addressee distribution (e.g., Service Directorate). Follow steps (1) and (2), enter the Task Due Date, Task Assigned Date, and click the Send Email checkbox. Click the Save Routing button and your routings will be saved and sent. Ensure you upload any attachments before completing this process.

SEARCHING


Search By DCN

Step (1) On the Main Information Screen, enter the DCN of the record you want to view in the Search for DCN field.

Step (2) Click on the  button or press Enter to view the record.

Note: If you wish to display a record in a database other than the Default database, you must select the desired database from the dropdown menu above the Tree.

Simple Search

Step (1) Click on the  button on the Navigation Bar or the **Search** tab to open the Search screen.

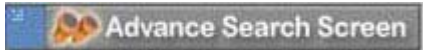
Step (2) Enter the criteria for your search. You can also use the following Searching Operators to scope your search.

Searching Operators	
=	Equal to the value specified
~	Not equal to the value specified
*	Containing the value specified

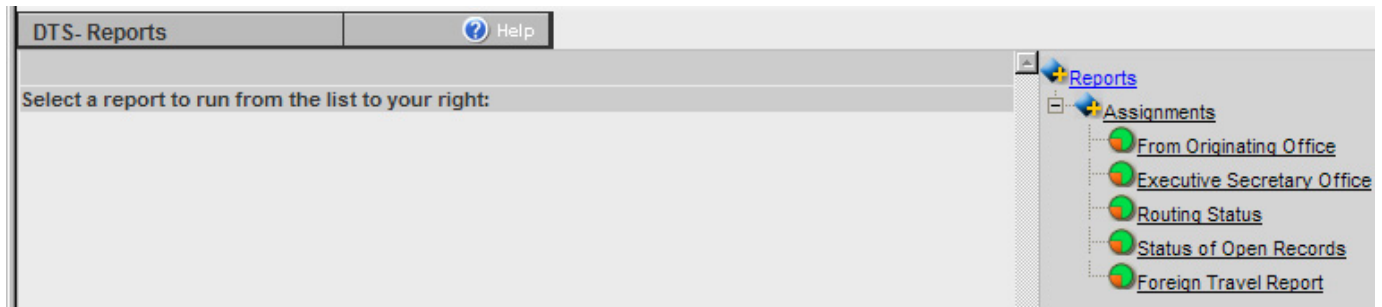
Step (3) Select your output and sort order.


Step (4) Press the  button.

Advance Search

Step (5) To further refine your search, click on the  button and define your search criteria.

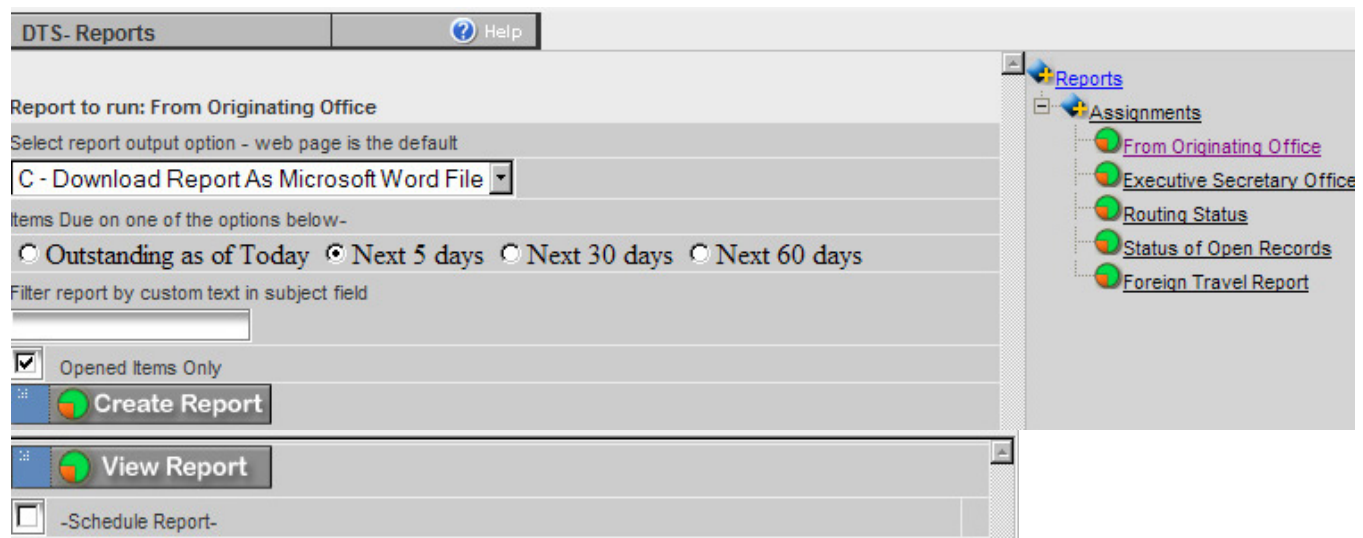
REPORTS



Step (1) Click on the Reports button  on the Navigation bar or the **Reports** tab to open the Reports screen.

Step (2) Select a report from the Tree View.

- From Originating Office – User's assigned office
- Executive Secretary Office – Assignments to FWS from Secretary's Office
- Routing Status – User can select an office to view routing status
- Status of Open Records – User can select from an Originating Office to a Head Office. Report will show open assignments to selected Head Office and sub-offices.
- Foreign Travel Report – Shows open documents with the DocType of Foreign Travel.



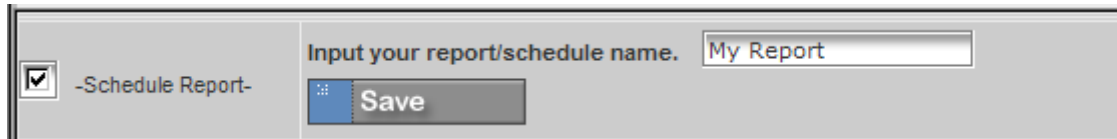
Step (3) Select the output format from the dropdown list.

Step (4) Select the results of Outstanding as of Today, 5 days, 30 days, or 60 days.

Step (5) Click the Create Report button.

Step (6) Click the View Report button. A box will appear that gives you the options of opening and printing the report or downloading the report to your computer.

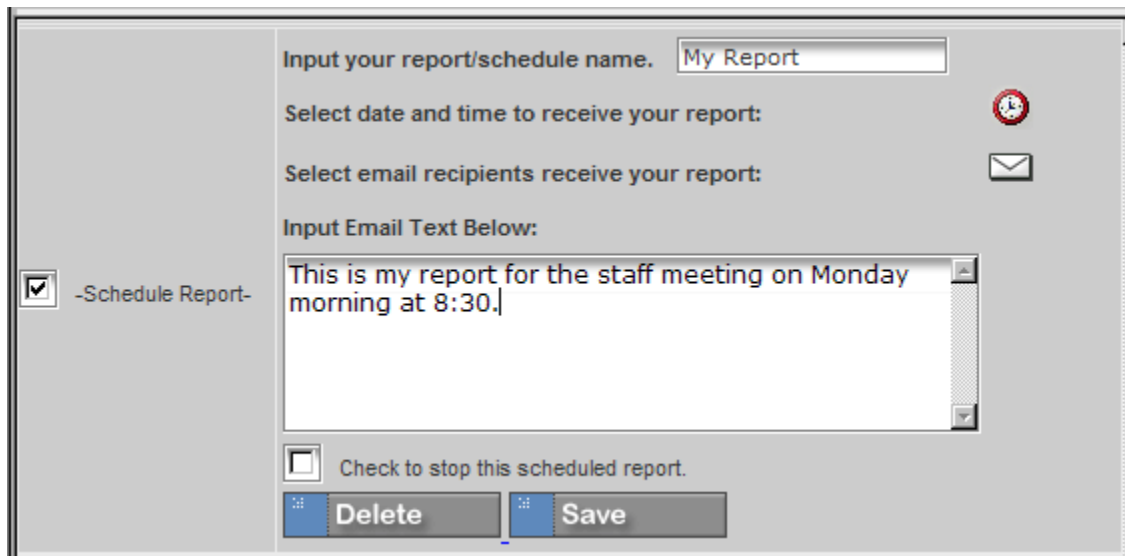
Scheduling A Report




-Schedule Report- Input your report/schedule name.


Step (1) Click on the Schedule Report checkbox below the View Report button.

Step (2) Enter a Name for your report and click the Save button



-Schedule Report- Input your report/schedule name.

Select date and time to receive your report: 

Select email recipients receive your report: 

Input Email Text Below:

Check to stop this scheduled report.

Step (3) Select the day and time to receive your report by clicking on the red clock.

Step (4) Select the email recipients by clicking the on the white envelope.

Step (5) Add an email text to send with your report and click the Save button.

Stop Report




Opened Items Only

Step (1) Select the report you want to stop receiving from the dropdown box below the Create Report button.


Step (2) Click the checkbox to Stop the Scheduled Report or click the Delete button if you no longer want the report.

Note: If you are going on leave or travel, you may want to just stop the report for the period you will be away instead of deleting completely. The report can be restarted following steps (1) and (2) and clicking the checkbox.

DOCUMENT VERSIONING

Step (1) Click the Attachment button  over the Tree or click on the Attachment heading in the tree.

View	File	Description	Date	Version	Author	Detail	Ext.Rout
	DTS User Manual.doc	029844 DTS User Manual	02/28/2007	V1	Margie Nash		
	DTS_Qrefguide_0913.pdf	029844 Quick Reference Guide	02/28/2007		Margie Nash		
	Office Names and Acronyms.doc	029844 Office Names and Acronyms	02/28/2007		Margie Nash		

Step (2) Click the View Versions button  in the Detail column.

Upload Version		Finalize				
View	File	Description	Date	Version	Status	Pending Edit
	DTS User Manual.doc	029844 DTS User Manual	02/28/2007		Pending	
Return to Summary:						

Step (3) Click the Upload Version tab

Version:	# 2
Author	<input type="text" value="Margie_2 Nash"/>
Document Description	<input type="text" value="DTS User Manual with edits"/>
Keywords	<input type="text"/>
Document:	<input type="text" value="C:\Documents and Settings\Margie Nash\Desktop\DT"/>

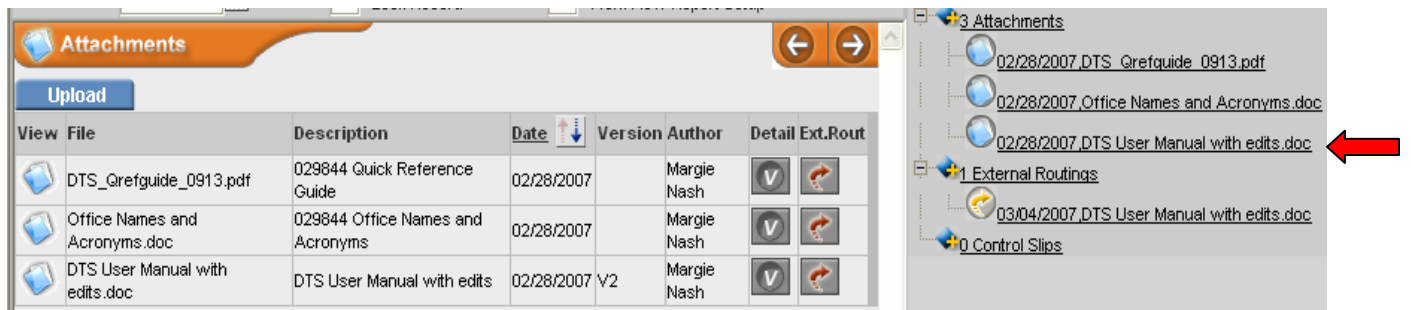
Step (4) Enter the following information in the Document Upload screen:

- Author (required field): Type name of author
- Document Description (required field): Type brief description of file
- Key Words: Type keywords (not required)
- Document (required field): Click the BROWSE and locate the file you want to attach

Step (5) Press the button, and you will be presented with a confirmation page, stating the following:

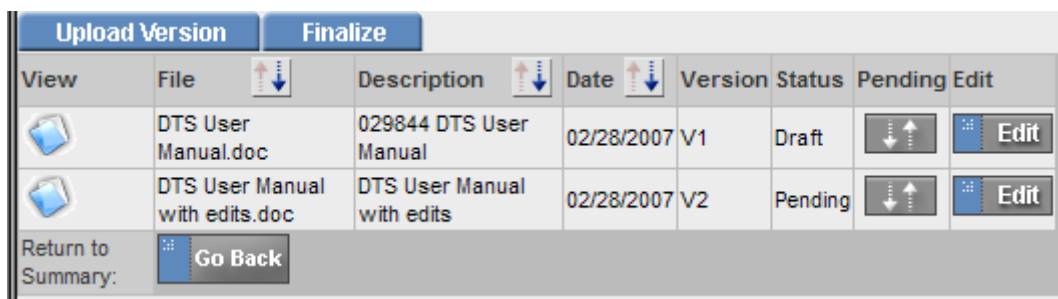
- File Name: The name of the file you uploaded
- File Size: The kilobyte size/count of the uploaded file
- Content-Type: The type of file uploaded

Step (6) Click the button.



The new version automatically becomes the Pending version and shows in the tree.

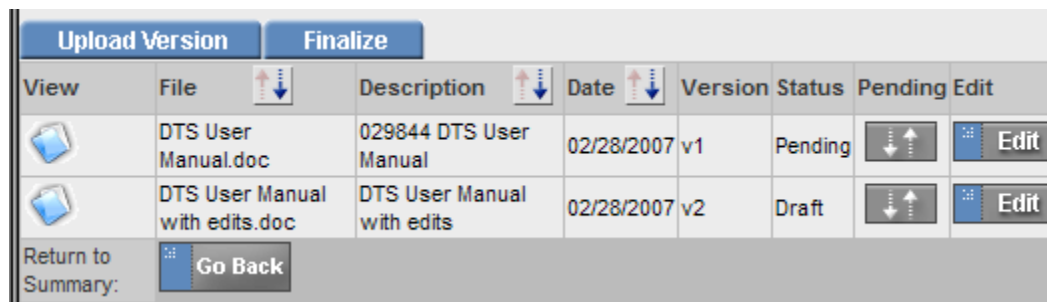
To view earlier versions of a document, click the View Versions button in the Detail column.



DOCUMENT DELETION

If you need to delete an uploaded document because of an error:


Step (1) Click the View Versions button in the Detail column




Step (2) Click the Edit button to the right of the document to be deleted.

The screenshot shows a web form titled "Attachments" with the following fields and buttons:

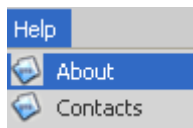
- Content Type: application/msword
- Input Date: 02/28/2007 12:14:12 PM
- Input by user: Nash, Margie_2
- File name: DTS User Manual with edits.doc
- Author: Margie Nash
- Description: DTS User Manual with edits
- Meta Data: (empty field)
- Return to Summary: Go Back button
- Save button
- Delete button

Step (3) Click the  button. A confirmation box will pop up. Select yes or cancel.

Step (4) Click the  button

HELP

In the Main Information Screen, there are three types of Help



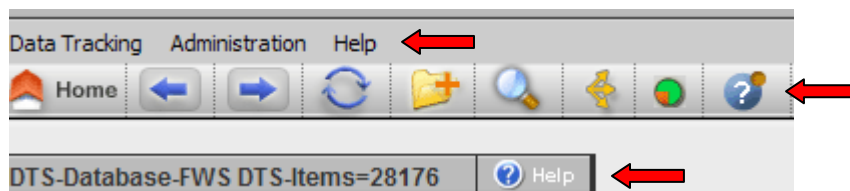
Menu Bar Help

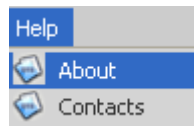


Navigation Bar Help



Reference Help





The *Menu Bar Help* shows the current version, build, and new features of the DTS, and also who to contact for user support.

DTS
Version: 2 Build: 58

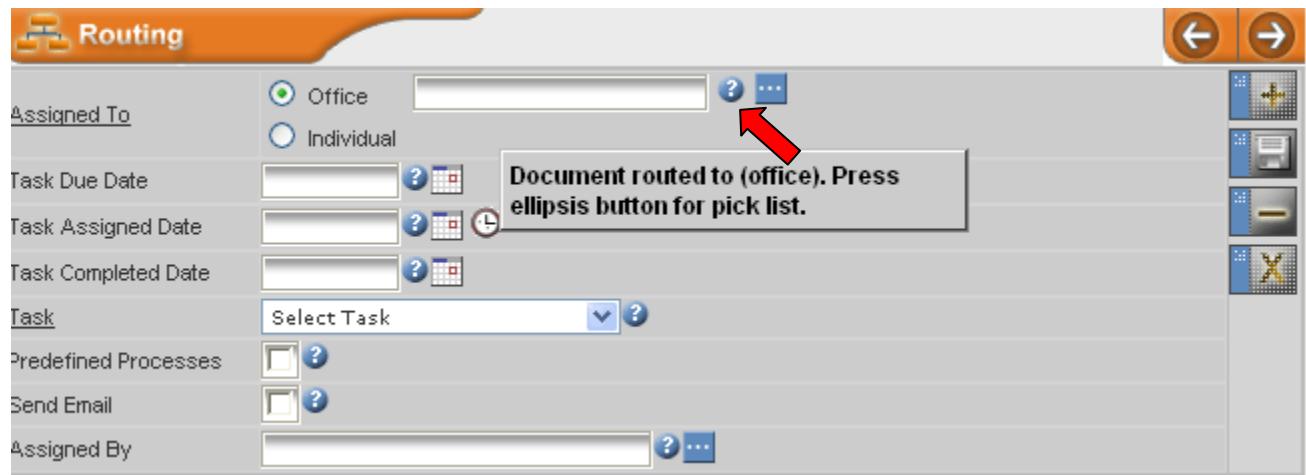
The Data Tracking System (DTS) is a web-based application designed to provide the user base with a centralized, secure, and easily accessible location to store, transmit and collaborate on service information.


What's new in this release:

Build 58 (03/17/2008)	<ul style="list-style-type: none"> Each bureau now has its own Tip of the Week.
Build 57 (02/28/2008)	<ul style="list-style-type: none"> Addressee is now required on all new DCNs. A help page is displayed to assist in entering one or more addressees.
Build 56 (02/25/2008)	<ul style="list-style-type: none"> New Routing Outbox page displays the status of all open DCNs created by your office. New option lets administrators designate which users can be routed to directly by other agencies or bureaus. You may now designate a task when selecting a predefined process and the code will be assigned to each task in the predefined process list. Added a user option allowing users to select full screen (default) or normal mode for the DTS window.



The *Navigation Bar Help* allows the user to turn on/off tool tips:



The *Reference Help*  allows the user to access the Quick Reference Guide online:

