BUREAU OF SAFETY AND ENVIRONMENTAL ENFORCEMENT

DATA TRACKING SYSTEM (DTS)

USER GUIDE

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THE DATA TRACKING SYSTEM

Data Tracking System (DTS) is a secure, Web-based information technology system for tracking correspondence and other packages; assigning correspondence for action; and processing surname packages for officials to review for new or revised directives, technical reports, and other documents.

BSEE Employees may use DTS to track any type of document including correspondence, directives, Federal Register notices and rules, technical reports that require official approval, and outreach material that officials need to review.

A. Using the Data Tracking System.

1. Individuals creating, managing, or surnaming documents in DTS must—

a. Determine the appropriate database to use in the DTS. At this time BSEE has three databases – **General** for most items, **Technical** for technical guidance documents, and **Restricted** for more sensitive items such as PII.

b. Follow the standard processes laid out in this guide.

c. Ask questions or report problems to the DTS administrators or the DTS system owner. The points of contact for help, including the BSEE point of contact, are available in DTS on the Home page. At the Top of the page select the "Help" item at the top left of the page and the help contacts selection will give you contact information.

2. DTS provides paperless processing throughout a document's lifecycle to the extent possible; however, there are some exceptions. Because the DTS is not uniformly implemented across all levels of the Department, it may be necessary to perform some steps of the DTS process in hardcopy. There is a "hardcopy" option in DTS for tracking a package that had to be printed for review and other actions (e.g., surnaming, signature). Once the hardcopy version is returned the document(s) should be reentered to DTS electronically by scanning and uploading.

3. The BSEE uses more than one database, and the document types, user permissions, and administrators are unique to each database. Individuals reviewing a document do not have to differentiate between databases. Individual user inboxes reflect all documents requiring surname, regardless of the database in which they reside.

4. Standard Practices in DTS:

a. After building the package and the routing table, ensure that at least one office/person in the routing has a "Task Assigned Date" and ensure they are notified by checking the "Send E-mail" block.

b. Always ensure the document package is routed back to the Office of Primary

Responsibility/Originating Office for a final review and consolidation of comments and changes before the document is finalized for signature.

c. Always use track changes when reviewing/surnaming documents.

d. Always use the original name of the document and save it to the DTS record as a "Version" to maintain a record of all previous versions of the document.

e. Once the document is signed and finalized, ALWAYS add the office "OA-RECORDS" as the last routing so that the records office can determine whether this package contains records that will need to be identified and archived.

f. If the document requires signature by the Deputy Director or Director, ensure that the Office of Primary Responsibility/Originating Office following final review, routes the document to the Office of Document Management (ODM). ODM will ensure that the document is signed, uploaded to DTS, and routed back to Office of Primary Responsibility/Originating Office.

B. Using This User Guide: If using an electronic version of this handbook all items in BLUE are hyperlinked to where they are referenced with the document.

C. Detailed Instructions

Appendix A, BSEE **DTS Desk Guide for Users** provides detailed instructions for accessing and using all BSEE DTS functions and databases.

Appendix B, BSEE **DTS Quick Reference Guide** is a convenient reference to common functions within the DTS

BSEE DTS Desk Guide for Users

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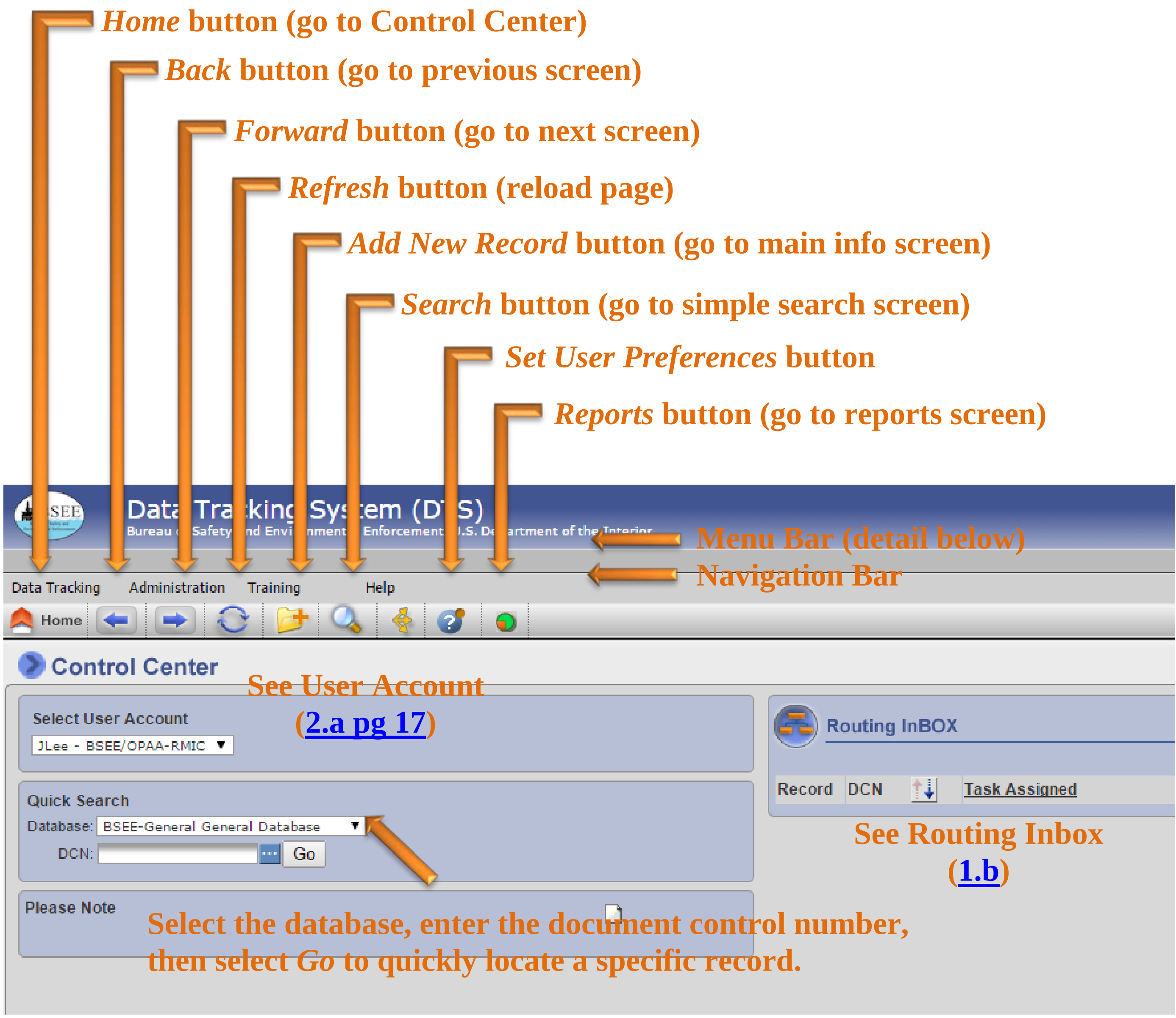
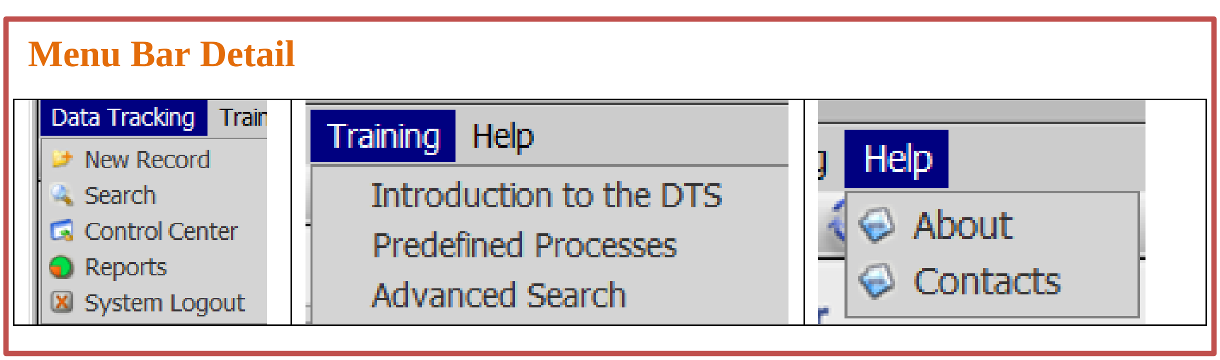
APPENDIX A
BSEE DTS Desk Guide for Users

1. WHAT YOU WILL SEE

a. Control Center. The *Home* button will take you to the Control Center from any page.

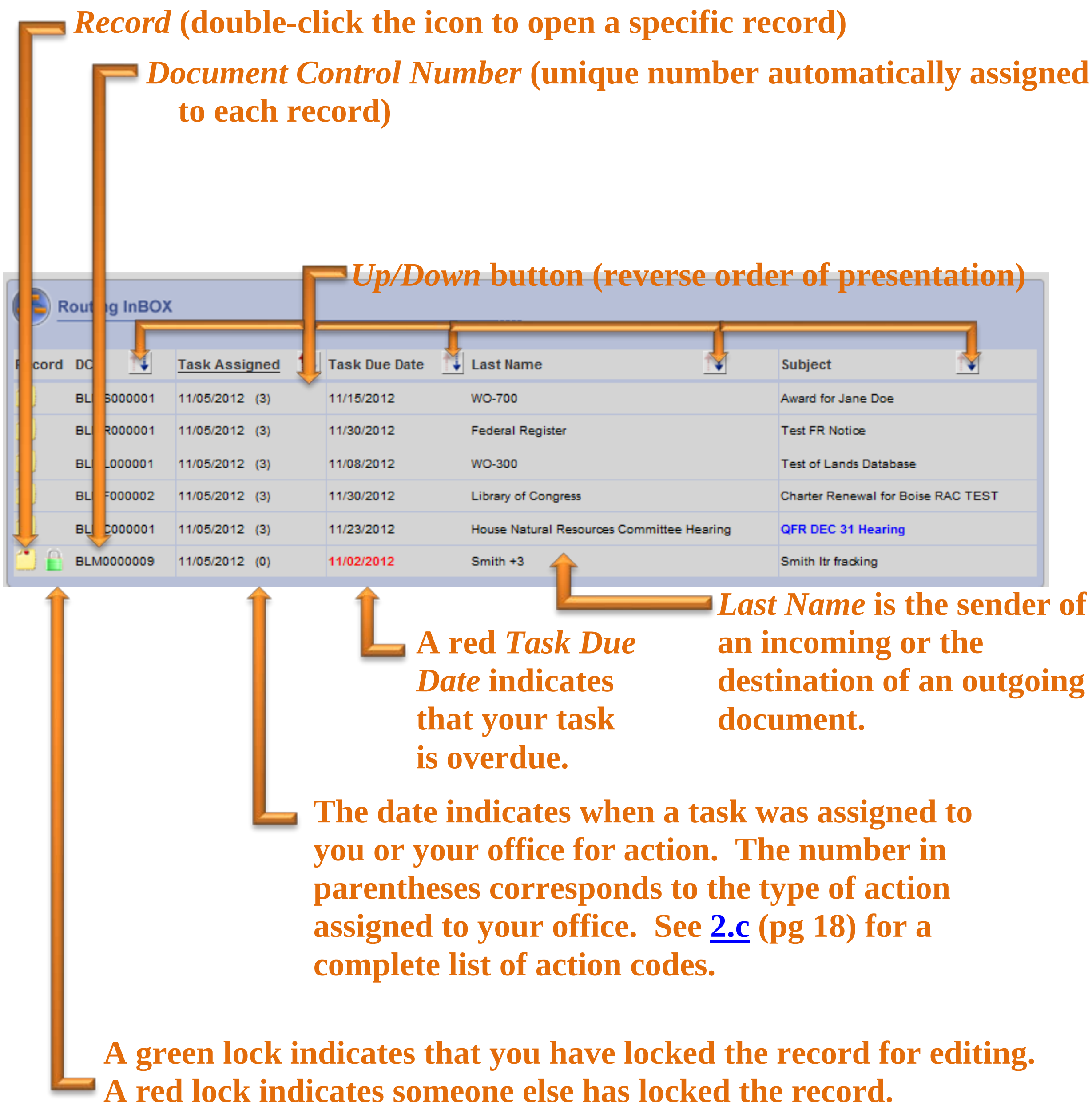
Illustration A-1 – Control Center Screenshot (Annotated)





b. Routing Inbox. Your Routing Inbox displays records with pending actions **assigned to your selected user account** (either as an individual or as a member of the office).

Illustration A-2 – Routing Inbox Screenshot (Annotated)



c. Main Information Screen. The main information screen first appears when you select *Add New Record* from the Control Center. It will default to the General Database, but you may select any BSEE database from the drop-down menu on the right side of the screen. *Note: You will only see the databases you are authorized to access with the User Account that you selected.*

Illustration A-3 – Main Information Screen (Right Side Screenshot)

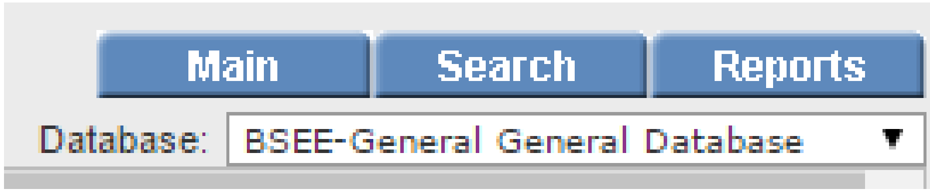


Illustration A-4 – Main Information Screen (Left Side Screenshot, Annotated)

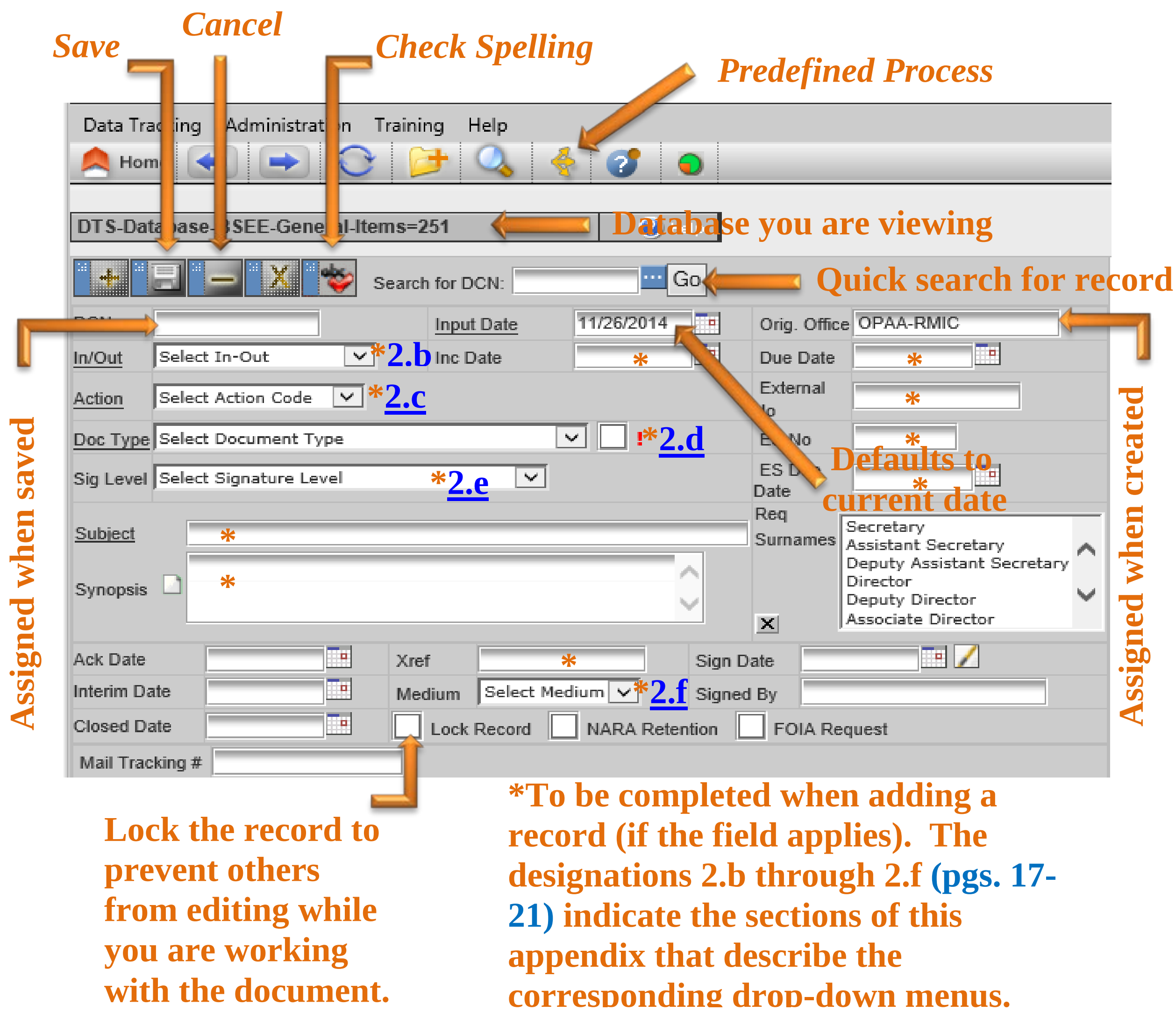
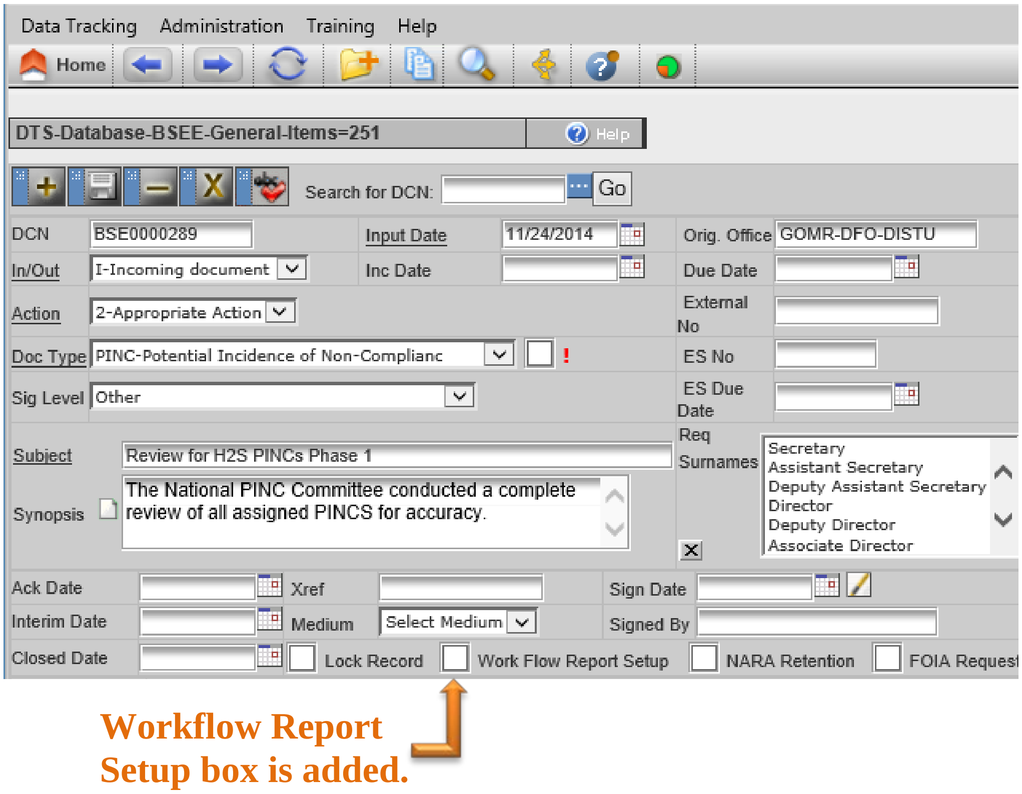


Illustration A-5 – Main Information Screen After Saving New Record



d. Addressee. The addressee box appears on the lower left side of the screen when a new record is saved.

Illustration A-6 – Addressee Screen with *Name* Tab Selected

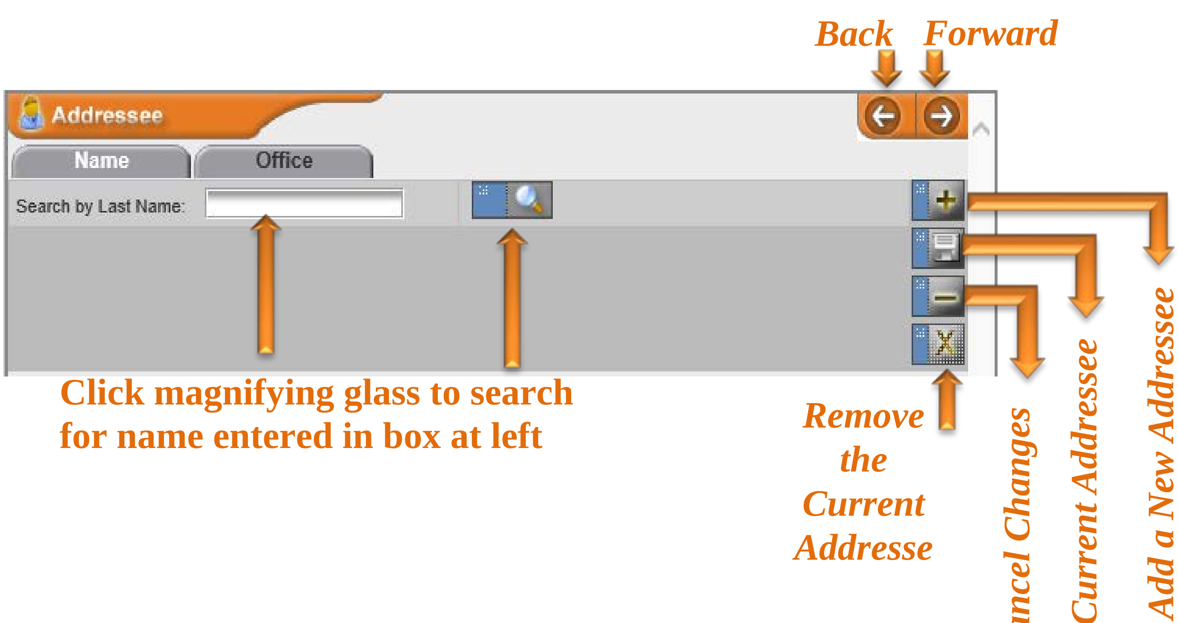


Illustration A-7 – Addressee Screen with *Office* Tab Selected

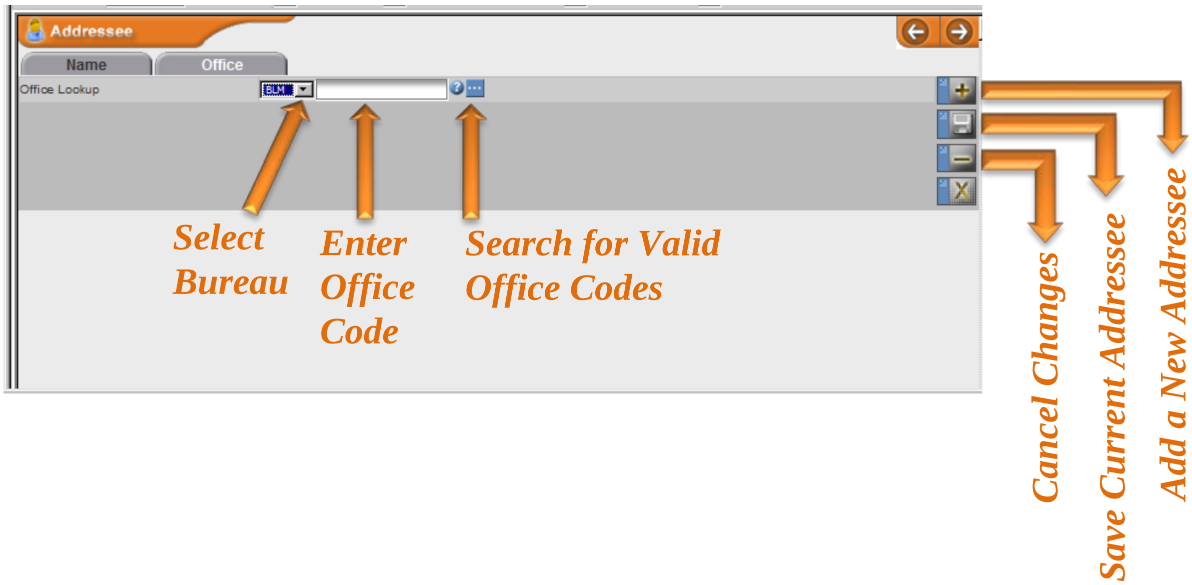


Illustration A-8 – Addressee Screen After Selecting *Add a New Addressee*

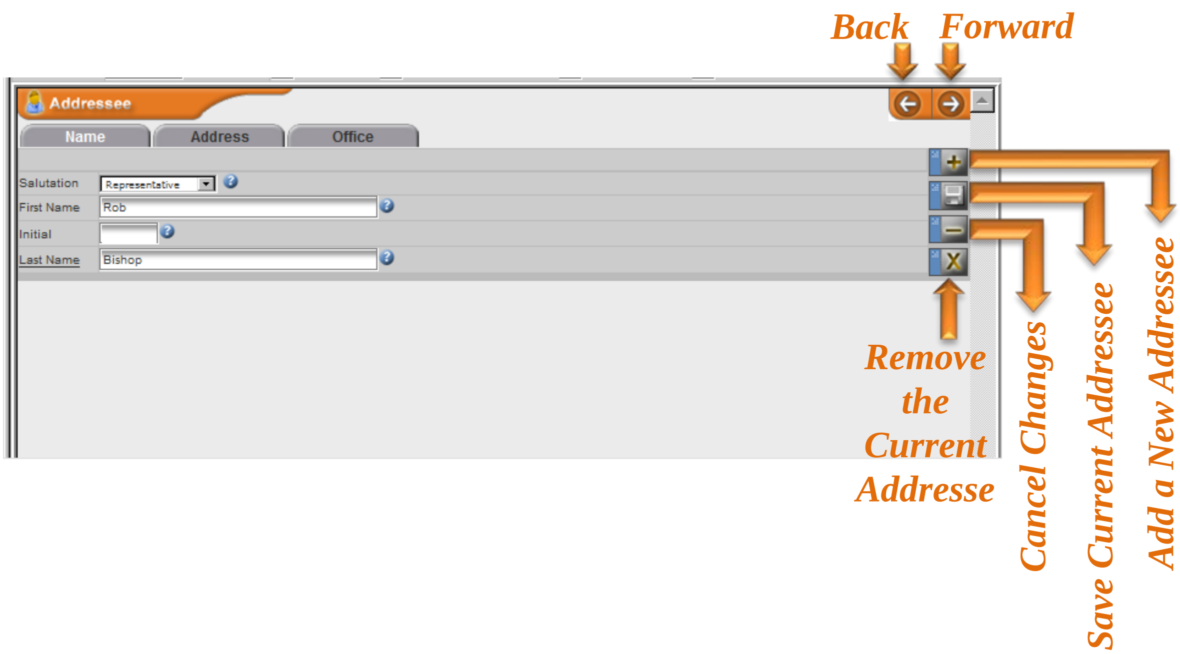
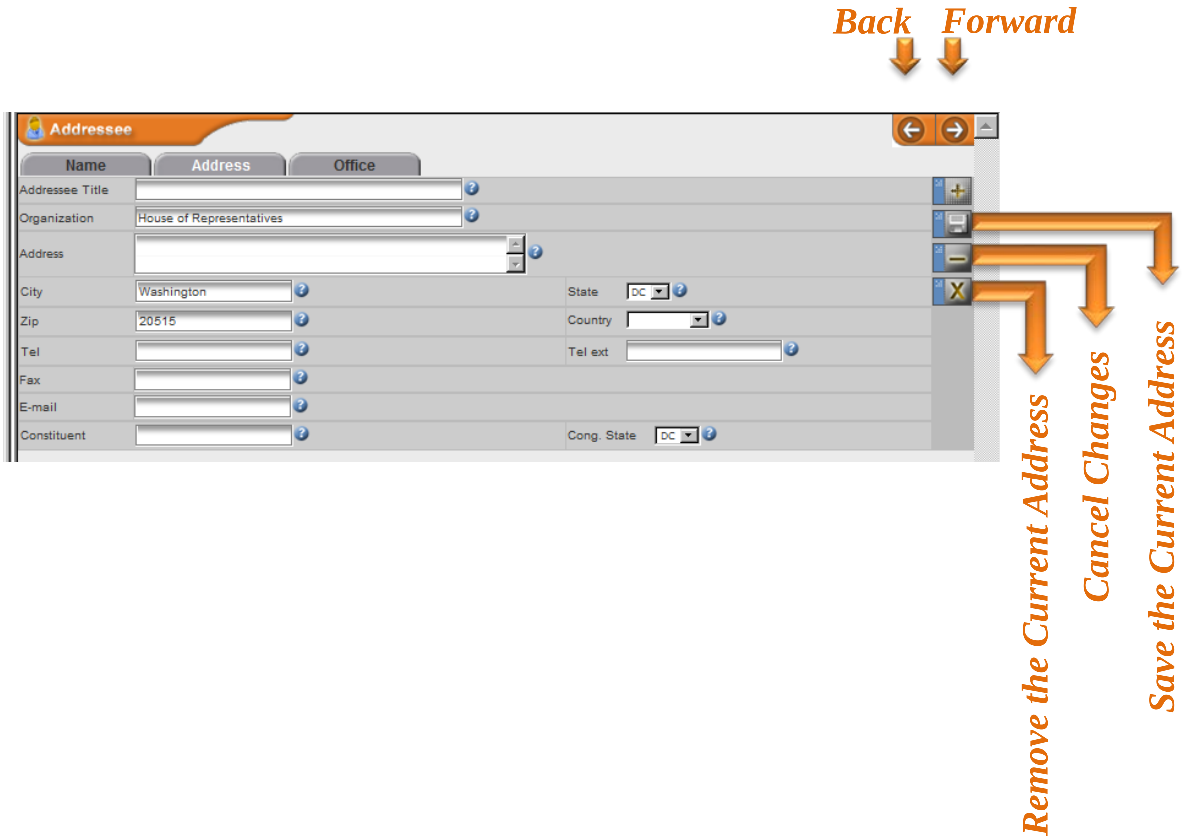


Illustration A-9 – Addressee Screen with *Address* Tab Selected



e. Tree View. The tree view appears on the right side of the screen once the addressee is added to a new document.

Illustration A-10 – Tree View (Annotated)

Comment **(open the overall comment screen)** ***(Note: This is different from commenting on specific attachments during surnaming. See 4.e and 4.f for more information)***

Add Routings **(open the routing screen at bottom left)**

Attachments **(open the attachments screen at bottom left)**

Add Addressee **(open addressee screen at bottom left)**

Control Slip **(create a control slip)**

Refresh **(reload the tree)**

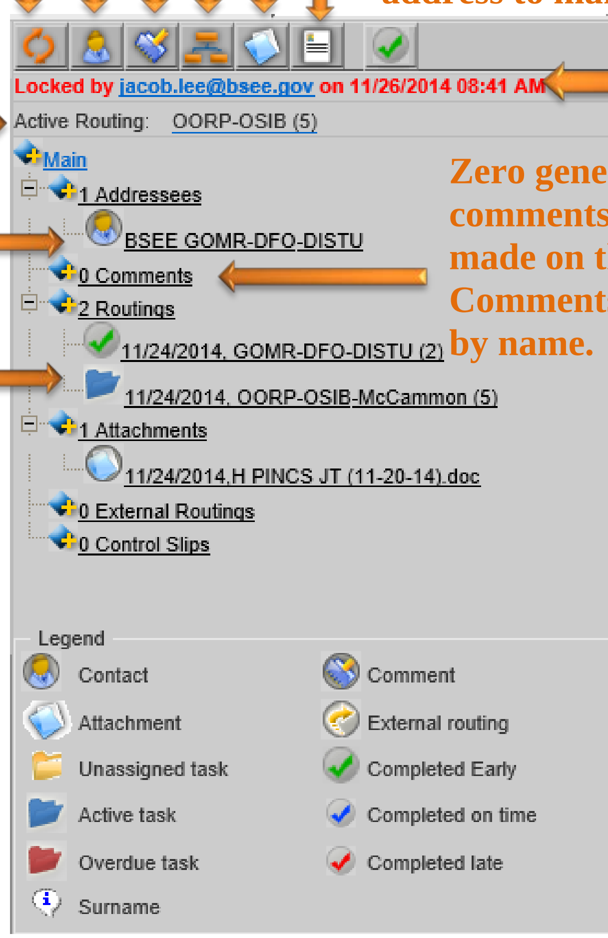
Indicates who has locked a record. Click on the email address to make contact.

Indicates which office currently has action and identifies the action in parentheses.

Indicates who sent an incoming or to whom an outgoing is addressed.

Zero general comments have been made on this record. Comments will appear by name.

A green check mark indicates a completed assignment. A red check mark indicates the assignment was completed late. A blue folder indicates an active assignment. A red folder indicates a late assignment. A yellow folder indicates the task is not yet assigned to the office.



f. Attachments. The attachments screen (Illustration A-10.a) appears when the *Attachments* button is selected from the tree view. The attachments screen with documents attached (Illustration A-10.b) appears when the word *Attachments* (or one of the file names under that heading) is selected from the tree view.

Illustration A-11 – Attachments Screen (Annotated)

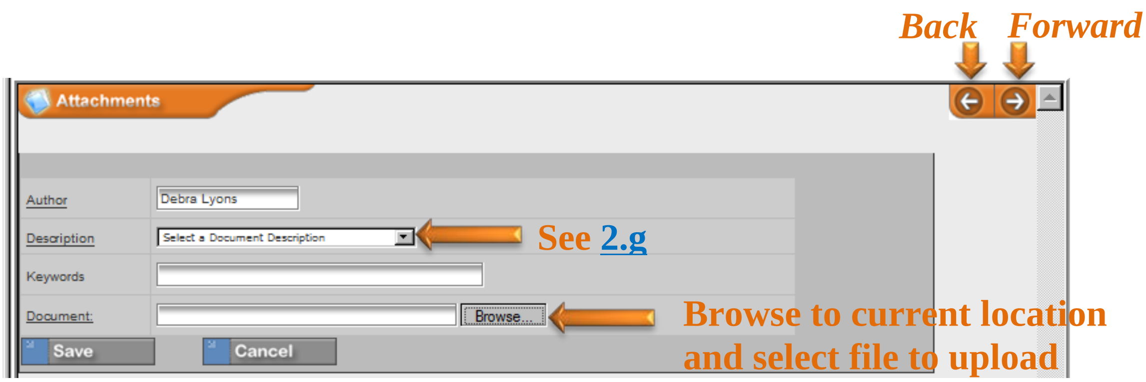
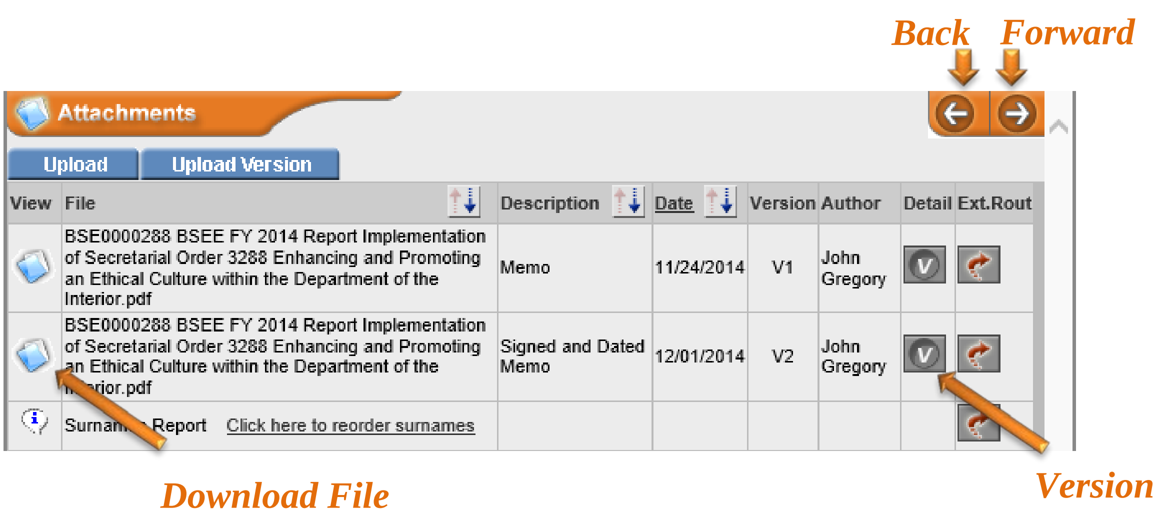


Illustration A-12 – Attachments Screen with Documents Attached



g. Routing

Illustration A-13 – Routing Screen with *Routing* Tab Selected

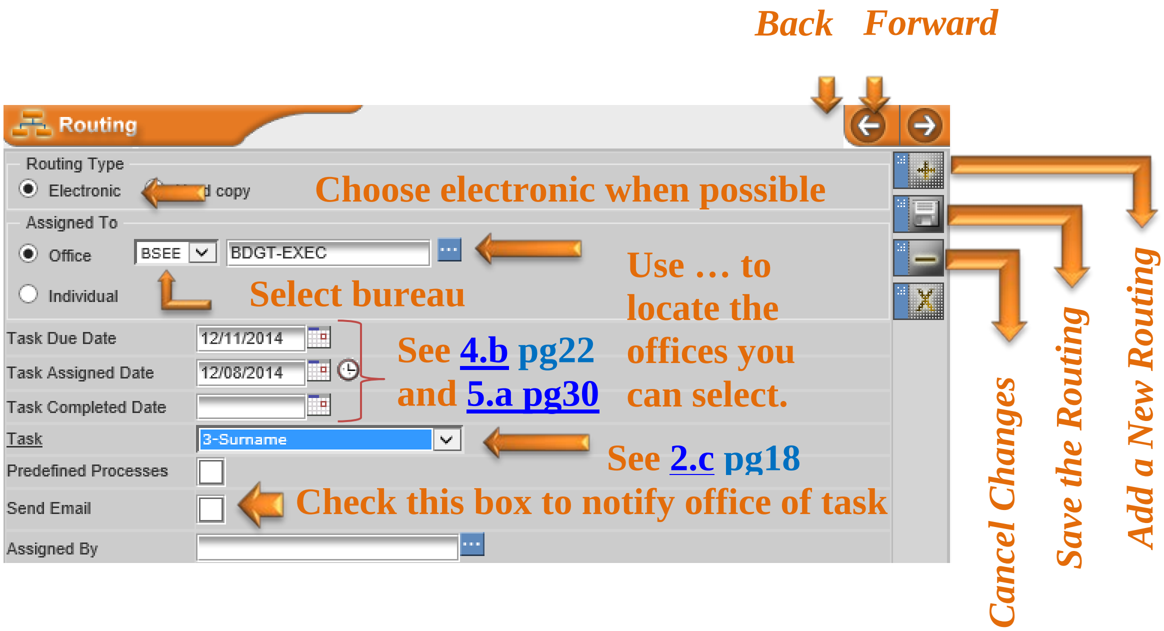


Illustration A-14 – Routing Screen with *Route Comment* Tab Selected

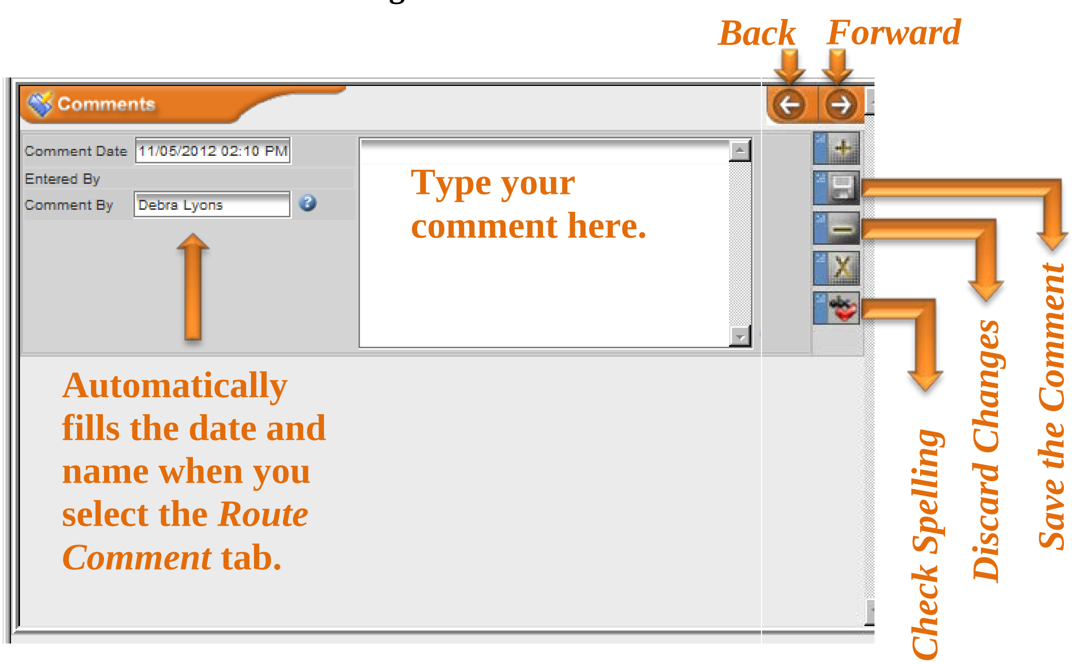


Illustration A-15 – Routing Screen with *Insert* Tab Selected

When the *Insert* tab is selected, the new routing is inserted <u>before the current routing</u>. (The *Add a New Routing* button that appears when the *Routing* tab is selected, adds the new routing at the end of the routing tree.)

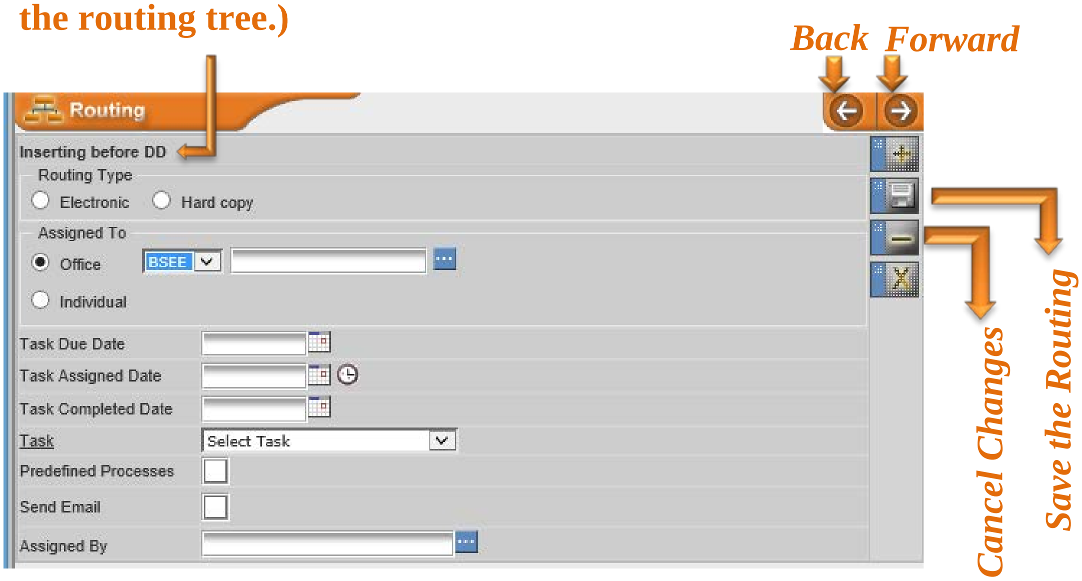


Illustration A-16 – Routing Screen with *Surname* Tab Selected

Save the Surname

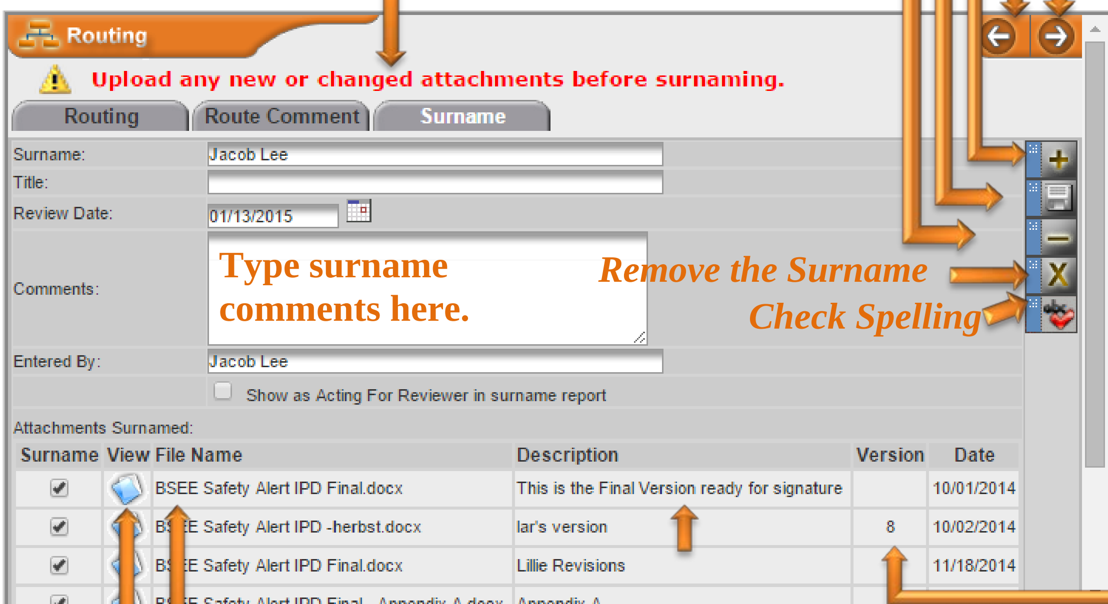
Cancel Changes

Add a New Surname

Back

Forward

Before you surname a document, be sure you have uploaded any new documents or document revisions.



Indicates the number of versions to this point for each document.

The description helps you navigate through the various documents associated with this record. (See [2.g](#) pg21)

To open a document, click on the file name.

Check only the file(s) you are surnaming. In this example you would surname only the Final Version and previous drafts. Be sure to read the *Note to Reviewers* and *Routing Comments* for additional guidance for this specific record.

h. Predefined Process Routing. Predefined processes allow users to select a predetermined block of routings rather than enter each step individually. To reach the screen below, select the *Predefined Process* button from the navigation bar on the main information screen. After entering a description and selecting the *Save* button Save at the bottom, three tabs will appear as shown in Illustrations A-18, A-19, and A-20.

Illustration A-17 – Predefined Process Screen

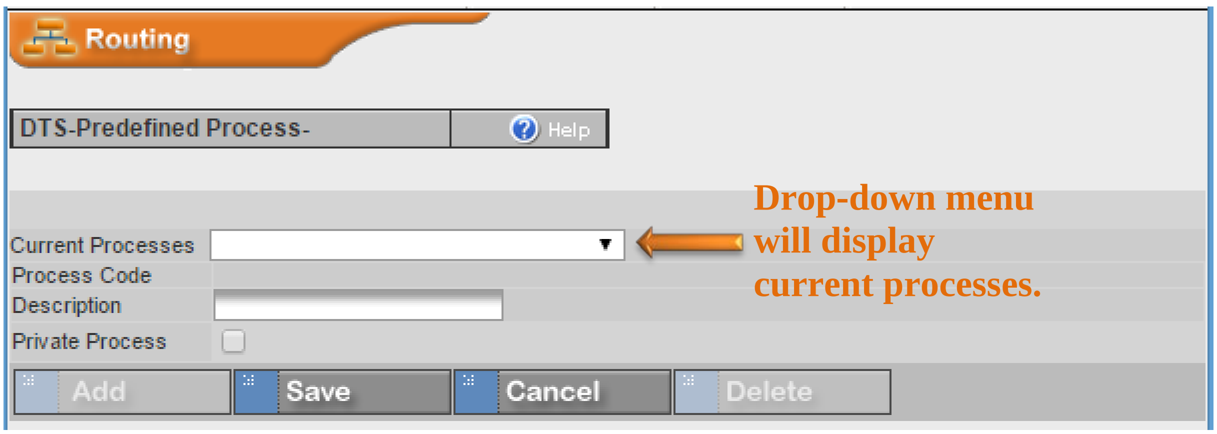


Illustration A-18 – Predefined Process Screen with *Process Name* Tab Selected

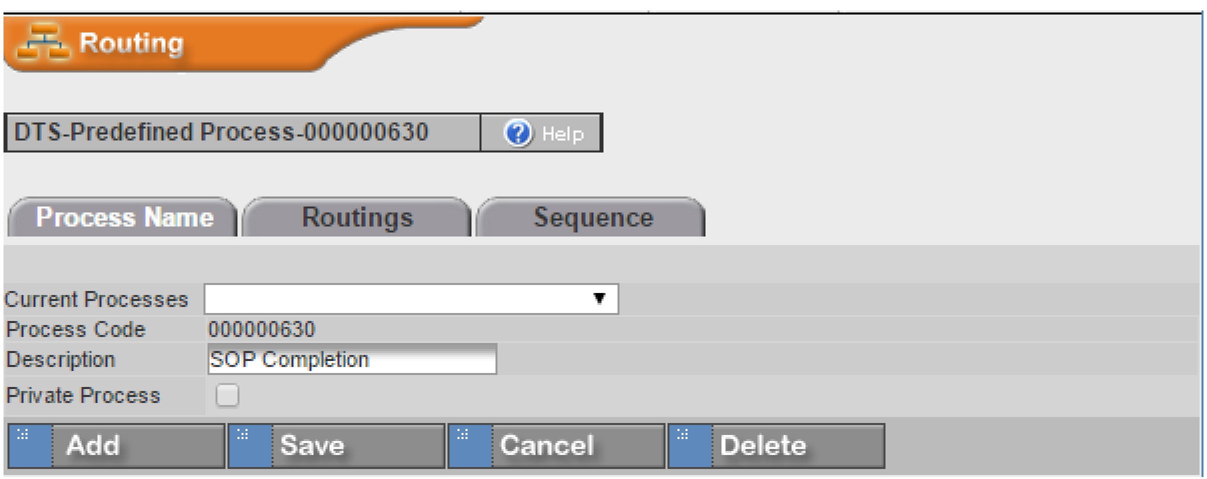


Illustration A-19 – Predefined Process Screen with *Routings* Tab Selected

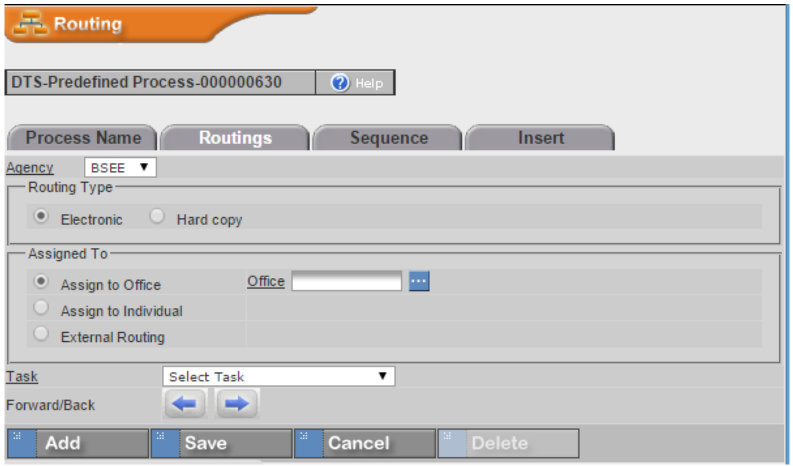
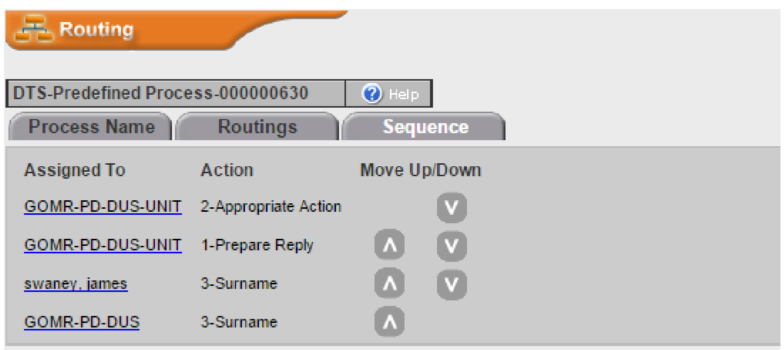
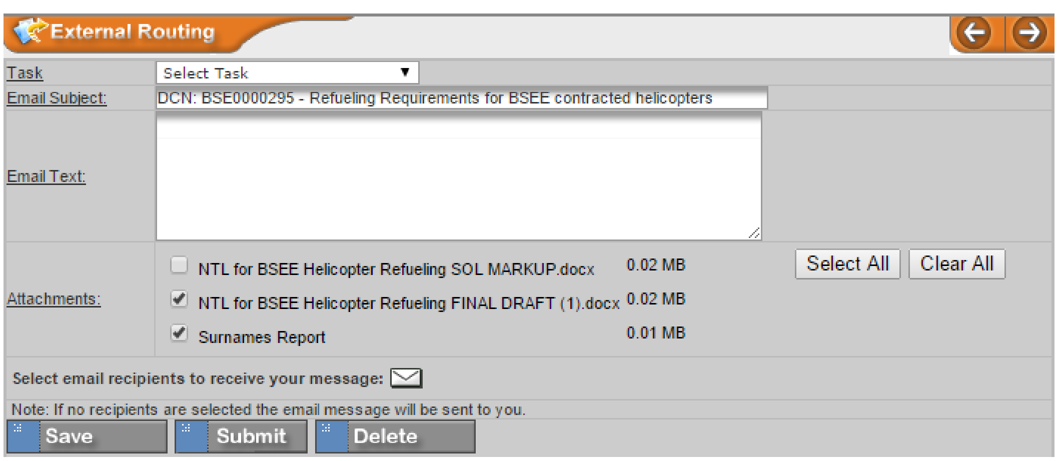


Illustration A-20 – Predefined Process Screen with *Sequence* Tab Selected



i. External Routing. External routing can be used to send documents via email to users outside of the DTS.

Illustration A-21 – *External Routing* Screen



j. Control Slips. Control slips summarize the actions completed and are printed in hardcopy to file with the official record or placed on the cover of a document package prepared for signature or manual surnaming. To reach the screen below, select the *Control Slip* button  from the tree view.

Illustration A-22 – Control Slip Screen

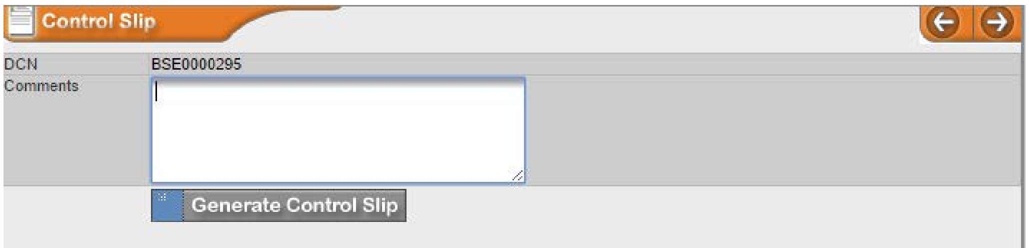


Illustration A-23 – *Control Slip* Screen After Generating Control Slip

Illustration A-24 – Control Slip

BUREAU OF SAFETY AND ENVIRONMENTAL ENFORCEMENT
DOCUMENT TRACKING CONTROL SLIP

Date: 01/13/2015

DCN: BSE0000295	**ES No:**

Orig Office: GOMR-DFO	**Input Date:** 12/12/2014	**Addressee:** Lars Herbst
Due Date: 01/16/2015	**Signature Level:** RD	

Subject:
Refueling Requirements for BSEE contracted helicopters

Comments:

Task Codes:

```
0 - Prepare Draft Reply      6 - Revise                       12 - Email Draft Reply
1 - Prepare Reply            7 - Obtain Additional Comments   13 - Advance Read
2 - Appropriate Action       8 - Other - See Comments         14 - File
3 - Surname                  9 - Mail/Distribute              15 - For Your Information
4 - Signature                10 - Finalize                    16 - Surname through DTS
5 - Review/Comment           11 - Simultaneous Surnames       17 - Required ES Review
```

Routing:

Assigned To	Task	Assigned Date	Due Date	Completed Date
GOMR-DFO	2 - Appropriate Action	12/12/2014		12/12/2014
DD	5 - Review/Comment		01/14/2015	
D-COS	5 - Review/Comment	01/13/2015	01/14/2015	12/15/2014
GOMR-ORD	4 - Signature	12/15/2014	01/16/2015	12/16/2014

Illustration A-25 – Reports Screen

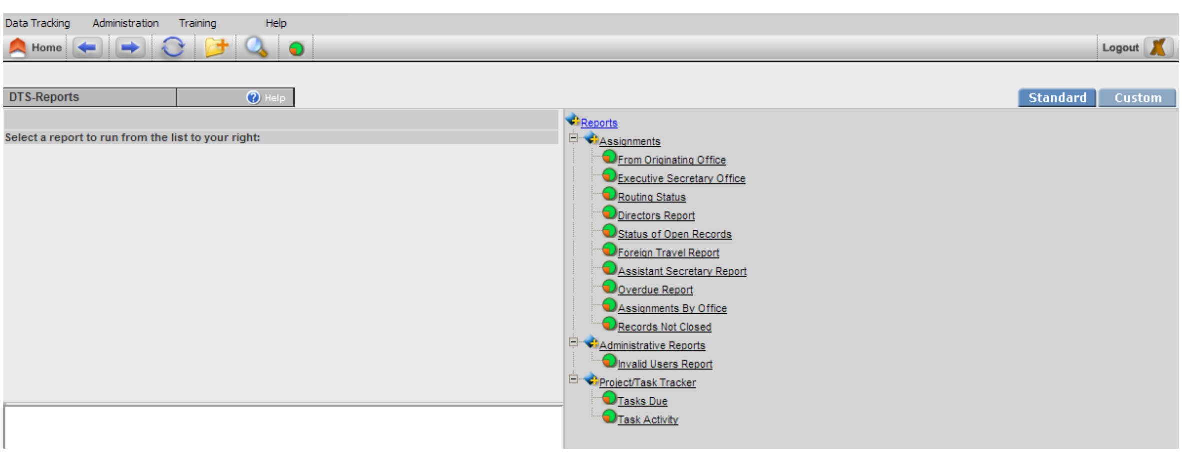


Illustration A-26 – Simple Search Screen

Use this to find packages when you know the document control number, the subject, or the office of origin.

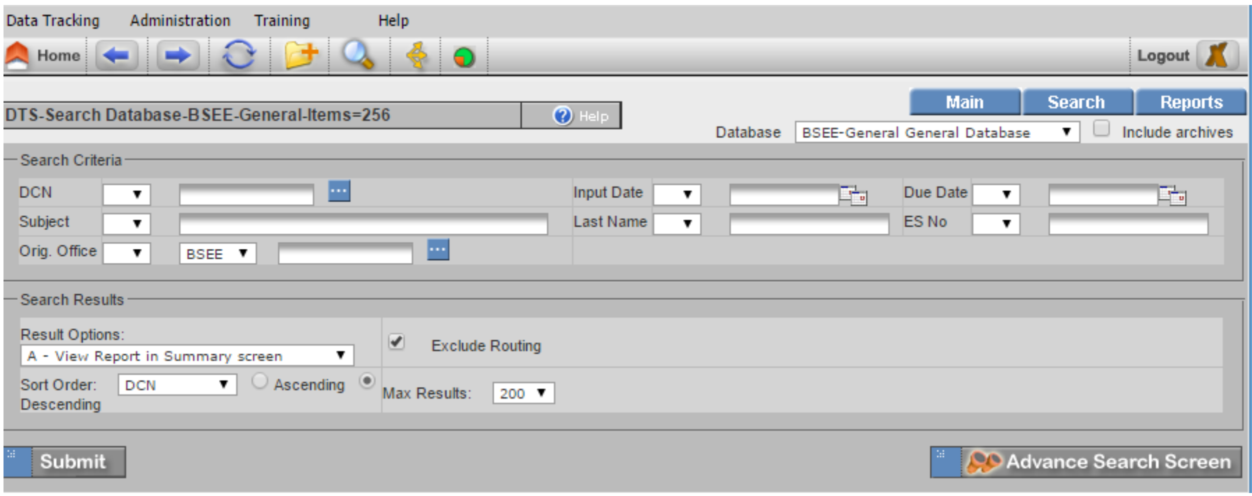
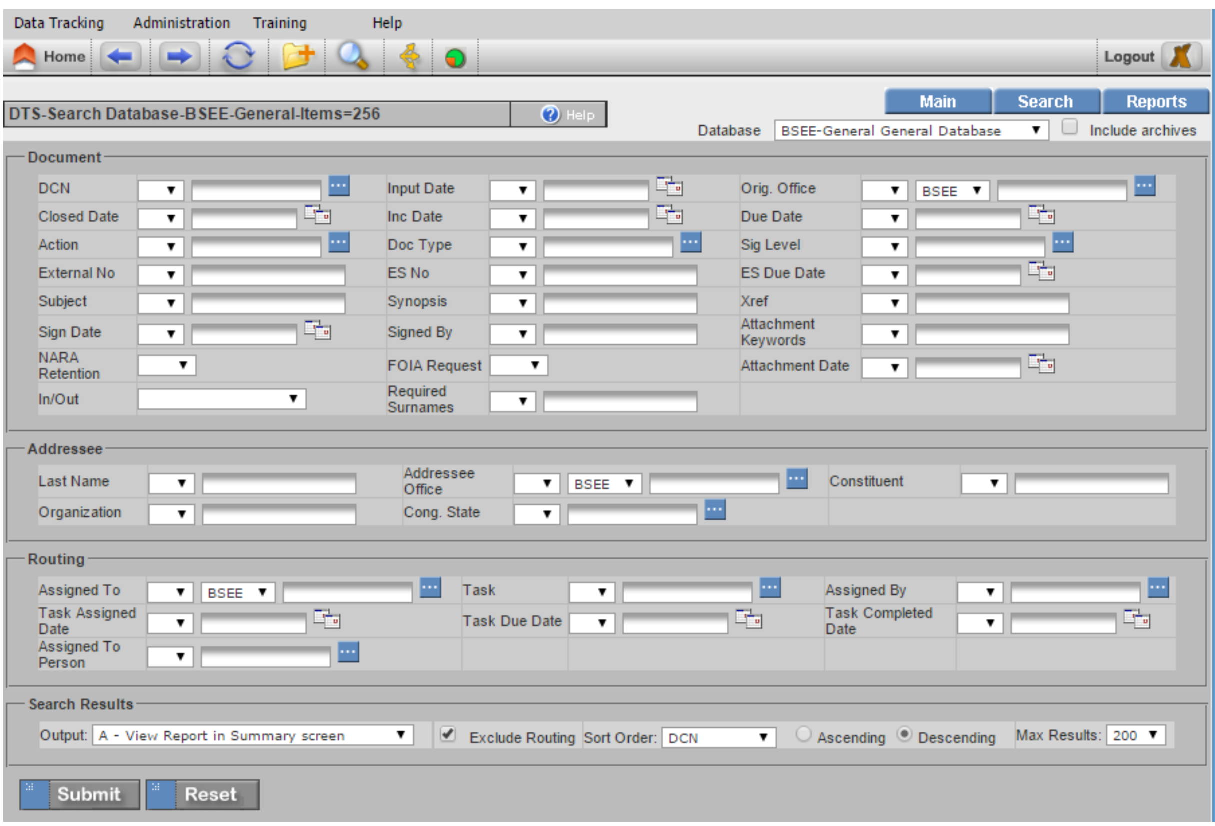


Illustration A-27 – Advance Search Screen

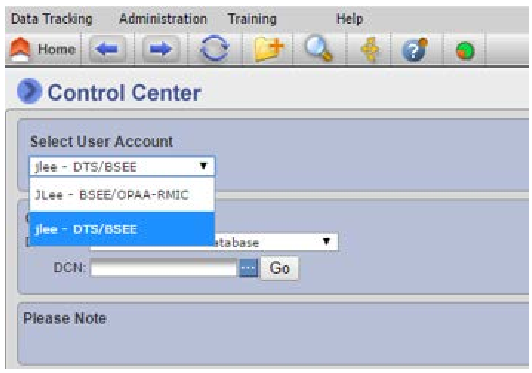
Use this when you are looking for a package that you're unfamiliar with but may know some basic data about. Select anyone of these items to find the package.



2. WHAT WILL YOU CHOOSE?

a. <u>DTS User Account</u>. Some users have more than one account. If you are an administrator, it is likely you will have two accounts. If you are temporarily assigned to another work area, you may have a temporary user account associated with that office and another user account for your home office. Upon log in, select the account you will be using. Your routing inbox will only display documents assigned to the office associated with that account. You can toggle between routing inboxes by alternating your user account selection.

Illustration A-28 – User Account Drop-Down Menu



b. <u>In/Out</u>. The In/Out selection is made when a new record is created in the DTS. If the record enters the DTS when a document is received by the BSEE, select *I-Incoming Document*. If the record enters the DTS when a document is initiated by the BSEE, select *O-Outgoing Document*. Although the BSEE may write a letter in response to an incoming document, the outgoing letter remains part of the original document control number identified by the incoming document.

Illustration A-29 – In/Out Drop-Down Menu

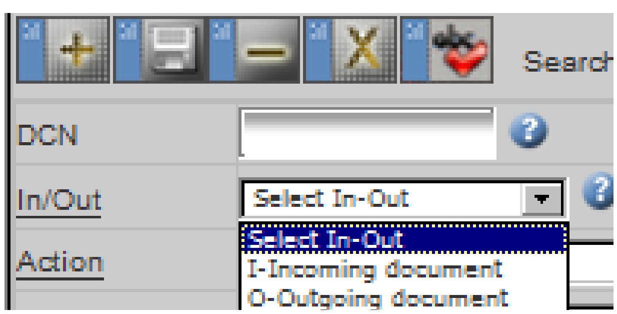
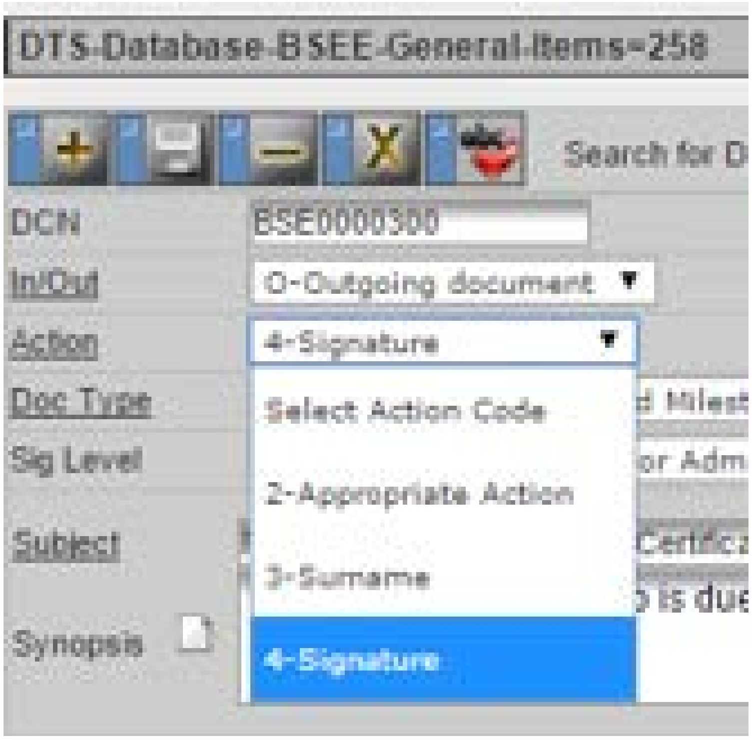


Illustration A-30 – Select Action Code



c. Action. An action code is assigned for each routing entry. An explanation of each action code follows:

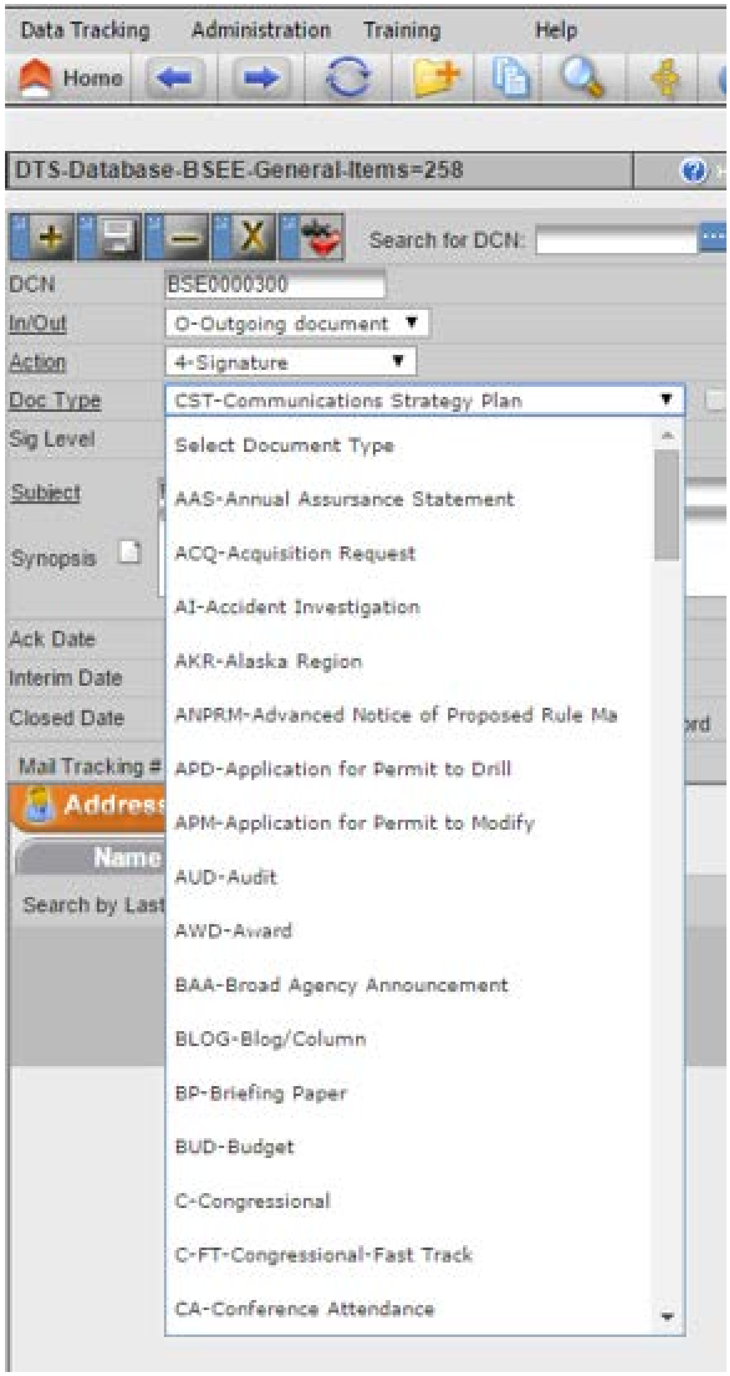
2-Appropriate Action – The office receiving the tasking determines appropriate action. It may be a written or verbal reply, a meeting, adding a comment to an administrative record, or merely reviewing the document for informational purposes.

3-Surname – Review, comment, and approve the draft document.

4-Signature – Sign the final document.

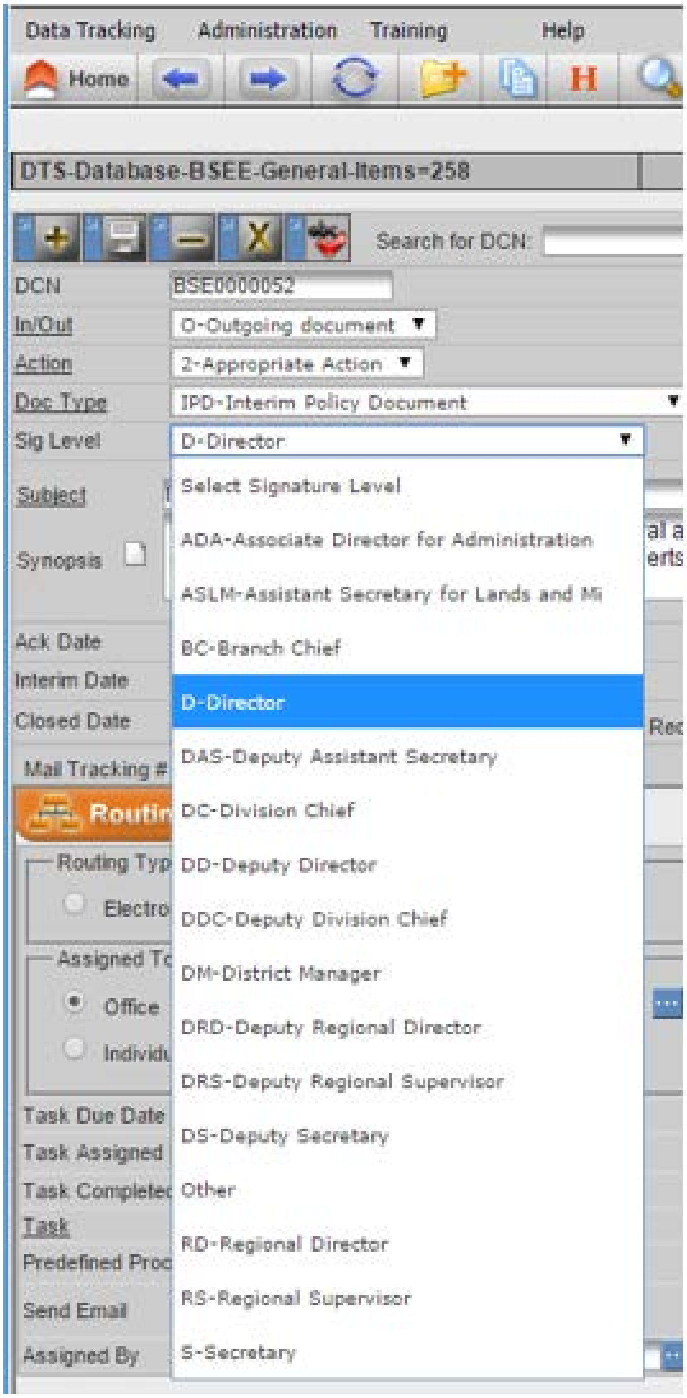
d. Document Type. The Document Type drop-down menu is a data tag that you add to indicate the type of document it is. This can be searched for in the search screens.

Illustration A-31 – Doc Type Drop-Down Menu



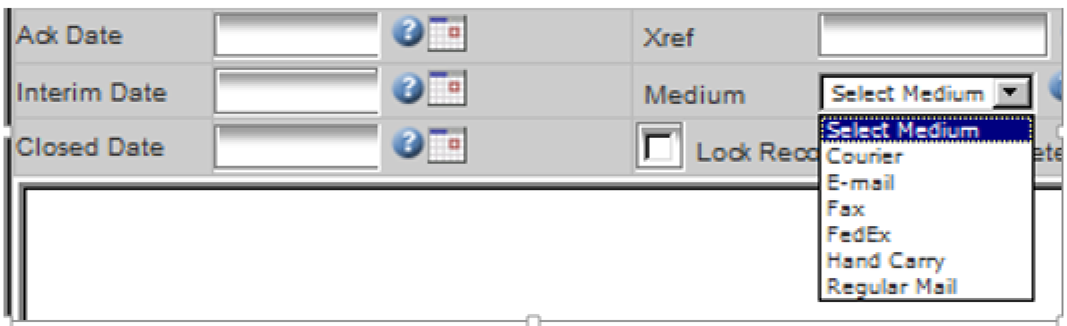
e. Signature level. If this document is to be signed (e.g. a directive) identify the highest level in the organization that requires a signature.

Illustration A-32 – Signature Level Drop-Down Menu



f. Medium. The *Medium* field only applies to incoming documents. Select the method that reflects how the incoming document was received.

Illustration A-33 – Medium Drop-Down Menu



g. Document Description. The Document Description is located on the attachments screen. A description is required for each document contained in the record to help reviewers understand each item they are reviewing. Do not confuse *document description* (individual attachment) with *document type* (overall record).

(The attachments screen appears when the *Attachments* button is selected from the tree view.)

3. NAMING CONVENTIONS AND TRACK CHANGES

a. Restrict Editing. When you create a document that you intend others to review, **restrict editing to *tracked changes*.** Within Word 2010, select the *Review* tab and then select the *Restrict Editing* button. In Item 2 – Editing restrictions, select *Allow only this type of editing in the Document* and select *tracked changes* from the drop-down menu. Under item 3 – Start enforcement, click *Yes, Start Enforcing Protection.* The menu will provide you with the option to password protect the document or allow only authenticated users. In most circumstances, do not check either of these options and simply click *O.K.* This will not prevent others from accepting or rejecting changes, but it will require a deliberate step to stop enforcement prior to accepting or rejecting changes and will also ensure reviewers automatically use the *tracked changes* option.

b. Editing a Document. When you edit a document, perform all edits in **tracked changes** and **retain the original document name**. For example, if you edit the document *BID on Safety Alerts* you should retain the name**.** ***It is not necessary to alter the file name to include your initials, date, or version number. When you upload the document to DTS, you will upload the updated version and DTS will give it a version number, the date and your initials will automatically be associated with the latest version of the file.***

c. Describing a Document. When you upload a file or new version, you will be asked to give the file a description. These descriptions will display on the routing screen after the file name and provide reviewers a guide to the various documents contained within the record and a clue as to what each document may require.

4. LET'S BEGIN AND BUILD A PACKAGE

a. Log In.

STEP 1. Go to the following link: https://dts.fws.gov/ or use the link on The Pipeline.

STEP 2. Enter your active directory ID (e.g smithj@mms.gov) and active directory password, and then click *O.K.*

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*. [See Illustration A-28 - User Account Drop-Down Menu pg17.]

b. Add A New Record. The *Add New Record* function is used to generate a unique document control number (DCN) and then track, route, surname, or distribute a document. If you are adding a new document to the DTS and a BSEE DCN has already been assigned to the overall record, do not continue—go to paragraph 4.f – Add an Attachment (pg26).

STEP 1. From the Control Center's main navigation bar, select the *Add New Record* button . [See Illustration A-1 – Control Center Screenshot (Annotated) (pg 1).]

STEP 2. The main information screen will appear. [See Illustrations A-3 – Main Information Screen (Right Side Screenshot) and Illustration A-4 – Main Information Screen (Left Side Screenshot, Annotated) (pg3).]

STEP 3. The BSEE General Database is the default. If necessary, select a different database from the drop-down menu on the right side of the screen. [See Illustration A-3 – Main Information Screen (Right Side Screenshot) (pg3).]

STEP 4. Do not enter data into the *DCN* field; a unique number will be generated when the new record is saved.

STEP 5. The *Input Date* will default to the current date. If necessary, select the calendar to the right of the field and select another date.

STEP 6. The *Originating Office* field will default to the office associated with the user account with which you logged in.

STEP 7. Select either *I-Incoming Document* or *O-Outgoing Document* to complete the *In/Out* field. If you are starting with a document that was received by the BSEE, select *I-Incoming Document*. If you are starting with a document initiated by the BSEE, select *O-Outgoing Document.* [See Illustration A-29 – In/Out Drop-Down Menu. (pg17)]

STEP 8. Use the calendar to the right of the *Inc. Date* field to select the date of an incoming document. Do not use this field when adding an outgoing document to the DTS.

STEP 9. Use the calendar to the right of the *Due Date* field to select a due date for the entire record. This is the date by which all actions must be complete. Later, when routing is assigned, individual offices will be tasked with earlier deadlines to meet the record's overall due date.

STEP 10. Select the appropriate Action Code for the entire record from the *Action* drop-down menu. [See 2.c (pg 18) and illustration 30 (pg 18)for a more detailed explanation of action codes.)]

STEP 11. The *External Number* field is optional. Examples of external numbers include RIN numbers for Federal Register documents or GAO numbers for audits.

STEP 12. Select the appropriate Document Type to represent the entire record from the *Document Type* drop-down menu. This will differ from the *Document Description* associated with individual documents uploaded after the DCN is assigned. [See Illustrations A-31(pg 19).]

STEP 13. Enter the numerical portion of the Exec Sec control number into the *ES No.* field, if applicable.

STEP 14. Select the position of the individual who will sign the final document for this DCN from the *Sig. Level* drop-down menu. [See Illustration A-32 – Signature Level Drop-Down Menu(pg 20).]

STEP 15. Use the calendar to the right of the *ES Due Date* field to select the Exec Sec due date, if assigned.

STEP 16. Enter a brief description of the subject of the entire record in the *Subject* field. This is the description that will appear in user inboxes when routing is assigned. Be succinct, but descriptive, e.g. *public ltr requesting fracking info,* or *congress ltr requesting fracking info, NOI to sue [topic], etc...*

STEP 17. You may enter additional information to supplement the subject in the *Synopsis* field. Do not repeat the information entered in the *Subject* field.

STEP 18. Enter the numerical portion of other DCNs into the *Xref* field when records are directly related. For example, if three letters were received from different congressional offices requesting the same information, each record would receive its own DCN, but the other two DCNs should be entered in the *Xref* field.

STEP 19. Check the *Lock Record* box to lock the record so others cannot make changes until you have completed your actions and "unchecked" the box.

STEP 20. Click the *Save* button to save your record.

STEP 21. The DCN will be assigned and the page will refresh with the address screen appearing at the bottom. [See Illustration A-6 (pg 4) – Addressee Screen with *Name* Tab Selected.]

c. Select/Add Addressee(s). For DTS purposes, addressees are defined as the individual(s) or office(s) to whom an outgoing document is addressed or, in the case of an incoming document, the individual(s) or office(s) that sent the document to the BSEE. If your addressee is an office within the Department, go to paragraph 4.d – Select/Add Office(s) (pg25).

STEP 1. After saving the core information, scroll down to the addressee screen. [See Illustration A-6 – Addressee Screen with *Name* Tab Selected.] Type the last name of the addressee in the *Search by Last Name* field and click the *Search* button.

STEP 2. If the correct name is listed, click on the Last Name and the addressee and address information will fill in automatically. Then go to Step 8.
If the correct name is not listed, click the *Go Back* button Go Back, and then go to Step 3.

STEP 3. The addressee screen that appears is the same screen that appears when the *Add a New Addressee* button is selected. [See Illustration A-8 – Addressee Screen After Selecting *Add a New Addressee* (pg 5).]

STEP 4. Select the appropriate salutation (title), and enter the First Name, Middle Initial (optional), and Last Name (required).

STEP 5. Click the *Save* button on the right side of the addressee screen.

STEP 6. Click on the *Address* tab.

STEP 7. Complete all known fields with addressee information. *Note: accuracy is extremely important for this step because others will rely on the data you enter when selecting an addressee in the future.* [See Illustration A-9 (pg 6)– Addressee Screen with *Address* Tab Selected.]

STEP 8. Click the *Save* button on the right side of the addressee screen.

d. Select/Add Office(s).

STEP 1. After saving the core information, scroll down to the addressee screen, and then select the *Office* tab. [See Illustration A-7 (pg5) – Addressee Screen with *Office* Tab Selected.]

STEP 2. In the *Office Lookup* field, type the first few letters of the office code and click the ellipsis button, and then select the appropriate office. *If the office isn't in the database add all the fields you are sure of.*

STEP 3. Click the *Save* button on the right side of the addressee screen.

e. Add a Comment. This comment applies to the overall record. When a new record is created, you must either add a comment for the overall record or upload an attachment before any routing can be assigned. [See paragraph 4.h (pg 28)to add a routing comment or paragraph 5.c (pg 31) to add a surname comment.]

STEP 1. In your current record, click the *Comment* button located over the tree view or click 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; type your comment in the *Comment* box.

STEP 3. Click the *Save* button on the right side of the comment screen.

f. Add an Attachment.

STEP 1. Before adding an attachment, review your document. If the document will receive edits, is the document restricted to tracked changes (see paragraph 3.a (pg 21))? If you have more than one document, are they organized so they are easy to locate (e.g. one folder for the record)?

STEP 2. Click the *Attachments* button located over the tree view or click on the *Attachments* heading in the tree.

STEP 2. Click the *Upload* tab in the attachments screen. [See Illustration A-11(pg8) – Attachment Screen (Annotated).]

STEP 3. The *Author* field will default to your name.

STEP 4. Input an appropriate Document Description. The document description describes the individual attachment, not the overall record. It is more generic than the file name, and provides reviewers with a guide to help them navigate through several attachments within a single record.

STEP 5. Input keywords that will help search for this document.

STEP 6. Click the *Browse* button and locate the file you want to attach.

STEP 7. Click the *Save* button on the bottom of the screen.

STEP 8. Click the *Go Back* button to return to the attachments screen.

g. Assign Routing. When you create a record, it will automatically enter your office as the first routing. Once you have completed all steps necessary to begin routing the record outside of your office, you will need to enter a completion date for your office. [See paragraph 5.a (pg 30) – Complete the Initial Routing.] Routings can be added in predetermined blocks by selecting a predefined process, by creating your own predefined process, or by assigning individual routings.

(1) Use a Predefined Process

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. [See Illustration A-13 (pg 9) – Routing Screen with *Routing* Tab Selected.]

STEP 2. Click the *Predefined Process* checkbox in the routing screen and select a process from the dropdown list.

STEP 3. Click the *Save* button on the right side of the routing screen. The routing tree will refresh and display your predefined routings.

(2) Create a Predefined Process

STEP 1. Select the *Predefined Process* button from the navigation bar on the main information screen. [See Illustration A-4 (pg 3)– Main Information Screen (Left Side Screenshot, Annotated).]

STEP 2. The predefined process screen will appear. [See Illustration A-17 (pg12) – Predefined Process Screen.]

STEP 3. Type a description of your process in the *Description* field.

STEP 4. If you wish to reserve the process for your use only, click the *Private Process* checkbox.

STEP 5. Select the *Save* button at the bottom and three tabs will appear: *Process Name*, *Routings*, and *View*. [See Illustrations A-18, A-19, and A-20, (pgs 12 & 13) respectively.]

STEP 6. Select the *Routings* tab. [See Illustration A-19 (pg 13) – Predefined Process Screen with *Routings* Tab Selected.]

STEP 7. Select the *Add* button at the bottom of the window to add a new routing to your predefined process.

STEP 8. Select an office, task, and the anticipated turnaround days (turnaround days is optional).

STEP 9. Select the *Save* button at the bottom

STEP 10. Repeat steps 7 through 9 for each routing in your process.

STEP 11. View your process by selecting the *View* tab. Ensure your routings are in the desired order.

(3) Assign an Individual 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. [See Illustration A-13 (pg 9) – Routing Screen with *Routing* Tab Selected.]

STEP 2. Select *Electronic* or *Hardcopy* in the *Routing Type* field. Electronic should be your first selection, unless the individual or office is not accessible via the DTS.

STEP 3. Type the first few letters-numbers of the office code and click the ellipsis button to select an office. *Note: You cannot add an office that is not in the office list. To add an office to the list, contact your DTS administrator (select Help/Contacts from the menu for contact information).*

STEP 4. Use the calendar to select a due date for the individual routing, not the overall record.

STEP 5. DO NOT enter a date into the *Assigned Date* field. This date will be assigned automatically when the previous routing is complete.

STEP 6. DO NOT enter a date into the *Task Completed Date* field when a routing is first assigned.

STEP 7. Select the appropriate task for this routing from the *Task* drop-down menu. [See paragraph 2.c. pg18.)]

STEP 8. Check the *Send Email* box. This will notify offices when the routing is assigned. The DTS will automatically enter your name in the *Assigned By* field.

STEP 9. Click the *Save* button on the right side of the routing screen.

STEP 10. To add additional routings, click the *Add Routing* button on the right side of the routing screen and complete Steps 2 through 9 for each additional routing.

h. Add a Routing Comment. *Note: This comment applies to a specific routing associated with an individual or office and not to the entire record.* [See paragraph 4.e (pg 25) to add a comment to the overall record.]

STEP 1. Click on the routing in the tree that you want to add a comment to.

STEP 2. Click on the *Route Comment* tab Route Comment in the routing screen. [See Illustration A-14 – Routing Screen with *Route Comment* Tab Selected.]

STEP 3. The *Comment Date* and *Comment By* fields are pre-populated with today's date and the user's name; type your comment in the *Comment* box.

STEP 4. Click the *Save* button on the right side of the comments screen.

i. Insert a New Routing Above an Existing Routing.

STEP 1. Click on the routing in the tree below where you want the new routing.

STEP 2. Click on the *Insert* tab Insert in the routing screen. [See Illustration A-15 (pg 10)– Routing Screen with *Insert* Tab Selected.]

STEP 3. Select *Electronic* or *Hardcopy* in the *Routing Type* field. Electronic should be your first selection, unless the individual/office is not accessible via the DTS.

STEP 4. Type the first few letters/numbers of the office code and click the ellipsis button to select an office. *Note: You cannot add an office that is not in the office list. To add an office to the list, contact your DTS administrator (select Help/Contacts from the menu for contact information).*

STEP 5. Use the calendar to select a due date for the individual routing, not the overall record.

STEP 6. DO NOT enter a date into the *Assigned Date* field. This date will be assigned automatically when the previous routing is complete.

STEP 7. DO NOT enter a date into the *Task Completed Date* field when a routing is first assigned.

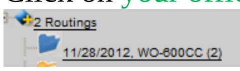
STEP 8. Select the appropriate task for this routing from the *Task* drop-down menu. [See paragraph 2.c. (pg 18)]

STEP 9. Check the *Send Email* box. This will notify offices when the routing is assigned. The DTS will automatically enter your name in the *Assigned By* field.

STEP 10. Click the *Save* button on the right side of the routing screen.

5. PERFORM ASSIGNED TASKS

a. Complete the Initial Routing. Once you have created a record and added addressees, comments, attachments, and routings, you will need to close the initial routing to your office so action can be assigned to the first office on the routing tree you created.

STEP 1. Click on your office routing to the right of the blue folder on the routing tree. 

[See Illustration A-10 (pg 7) – Tree View (Annotated).]

STEP 2. The routing screen will appear. [See Illustration A-13 (pg 9)– Routing Screen with Routing Tab Selected.]

STEP 3. If the *Lock Record* box 

above the *Routing* tab is checked, click on the *Lock Record* box again to unlock the record.

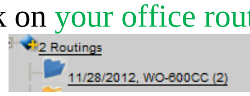
STEP 4. Select the current date from the calendar to the right of the *Task Completed Date* field 

.

STEP 5. Click the *Save* button  on the right side of the routing screen.

STEP 6. The DTS will automatically assign the next task on the routing tree.

b. Complete an Action Other Than Surnaming. Once all actions are completed for your office routing, the task must be marked as completed for the next routing to automatically occur. If the last task for your office is a surname, proceed to paragraph 5.c (pg 31). If the final task for your office is not a surname, follow the steps below.

STEP 1. Click on your office routing to the right of the blue or red folder on the routing tree. 

[See Illustration A-10 (pg 7) – Tree View (Annotated).]

STEP 2. The routing screen will appear. [See Illustration A-13 (pg 9) – Routing Screen with *Routing* Tab Selected.]

STEP 3. If the *Lock Record* box 

above the *Routing* tab is checked, click on the *Lock Record* box again to unlock the record.

STEP 4. Select the current date from the calendar to the right of the *Task Completed Date* field 

.

STEP 5. Click the *Save* button  on the right side of the routing screen.

STEP 6. The DTS will automatically assign the next task on the routing tree.

c. Surname a Record. When your office is assigned a record for surname, the individual users in your office designated to receive emails will be notified. The record will also appear in the DTS inbox for all users in your office who are included in your office listing for that database. Individual users may also be assigned personal tasks that will not appear in other users' inboxes. [See Illustration A-2 (pg2) – Routing Inbox Screenshot (Annotated).]

STEP 1. Review your Inbox. The due date and subject will provide clues to possible priorities. Local office procedures will dictate the individual(s) required to review and surname a document within your office and the order of review.

STEP 2. When it is your turn to review a record, click on the appropriate record  on the left side of your inbox. The main information screen, tree view, and routing screen with *Surname* tab selected will appear. [See Illustrations A-4 (pg 3), A-10 (pg 8), and A-16 (pg 11), respectively.]

STEP 3. From the tree view (Illustration A-10 (pg 8)), you can accomplish several things:

- If the record is locked, the tree view will display an email link to the individual who has locked the record. Click on the email link to ask the individual to unlock the record if you wish to make changes.
- If you wish to lock the record before you begin, click the *Lock Record* box on the main information screen (just above the *Routing* tab).
- The *Addressee* area identifies who sent an incoming document or who will receive an outgoing document. Click on an entry under *addressee* on the tree to open the addressee screen and view the individual's contact information.
- The *Comments* area shows any comments that have been attached to the general record and who attached them. Click on the individual's name to read their comment.
- The *Routing* area shows the sequence of routing, and the current status of the record. If you would like to insert another office prior to your review (or between two other reviewers in the tree), follow the instructions in paragraph 4.i. (pg 29) – Insert a Routing Above an Existing Routing. If you would like to add a routing to the end of the routing tree, follow the instructions in paragraph 4.g (3) (pg 27) – Assign an Individual Routing. To add a comment to a particular office's routing, follow the instructions in paragraph 4.h (pg 28) – Add a Routing Comment. Be sure to read any comments that have been added to your office's routing before beginning your review of the attachments.
- The *Attachments* area shows the documents that are attached to the record. These documents will also appear on the routing screen to the left when the *Surname* tab is selected. [See Illustration A-16 (pg 11).]

STEP 4. You will surname documents from the routing screen. [See Illustration A-16 (pg 11)– Routing Screen with *Surname* Tab Selected.] The *Document*

Description field will help you organize your review. If the record contains a Note to Reviewers, read that first. The Note to Reviewers should explain each of the attachments, what is expected of you in regards to the attachments, and provide any special instructions.

STEP 5. To open a particular document, click the file name under *Attachments* or the word *Attachments* on the routing tree. The attachments screen will display with documents attached [Illustration A-12 (pg 8)] below the main information screen. Click the button in the *View* column to download the file.

STEP 6. To edit a document, first save it to a location outside of the DTS on your computer. Do not change the current name

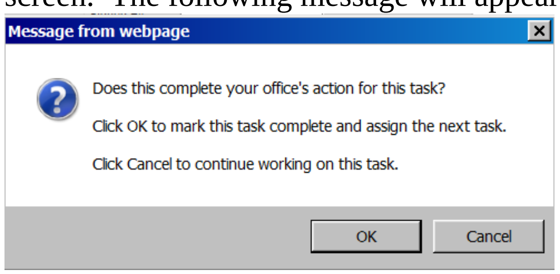
STEP 7. Execute your surname responsibilities for the document. Add appropriate comments to documents within the record, make edits to documents in tracked changes, and save the changes to the file on your computer (as described in step 6) outside of the DTS with their original file name(s).

STEP 8. Upload any documents you have edited with the versioning instructions in paragraph 5.d (pg 32) before proceeding to Step 9. If no edits have been made, proceed to step 9.

STEP 9. On the routing screen with *Surname* tab selected [Illustration A-16 (pg 11)], check the box beside the documents you wish to surname.

STEP 10. Type any comments that pertain to your surnaming of the entire record in the *Comments* box within the routing surname screen.

STEP 11. Click the *Save the Surname* button to the right of the routing surname screen. The following message will appear:



If others in your office need to review the record before the surnaming is complete for your office, click *cancel* at the bottom of the message window. If you are the last (or only) reviewer within your office, click O.K.

STEP 12. The DTS will automatically assign the next task on the routing tree.

d. <u>Create a New Version</u>**.** You must use the *Versioning* feature to upload documents containing your edits into the DTS.

STEP 1. Click the *Attachments* button located over the tree view or click the word *Attachments* in the tree. The attachments screen with documents attached [Illustration A-12 (pg 9)] will appear to the left of the tree, below the main information screen.

STEP 2. Click the *View Versions* button in the *Detail* column.

STEP 3. Click the *Upload Version* tab Upload Version.

STEP 4. The *Author* field will default to your name.

STEP 5. Place an appropriate Document Description in the space provided. Choose the document description originally associated with the file if the original description is accurate.

STEP 6. Input keywords that will help search for this document.

STEP 7. Click the *Browse* button and locate the file you want to attach. *Note: It should have the same file name as the original document and reside in the secure location you chose outside of the DTS before you began making changes.*

STEP 8. Click the *Save* button Save on the bottom of the screen.

STEP 9. Click the *Go Back* button Go Back to return to the attachments screen. *Note: To view all uploaded versions of a file, click the View Versions button to the right of the file name.*

6. ROUTE OUTSIDE THE DTS.

Documents can be routed to offices outside of the DTS in two ways: through email or in hardcopy.

a. <u>Create an External Routing</u>. An external routing is used to send a document through email to someone who does not have access to the DTS.

STEP 1. Click on the *Attachments* heading in the tree view. [See Illustration A-10 (pg 7) – Tree View (Annotated).]

STEP 2. The Attachments Screen with Documents Attached [Illustration A-12 (pg 8)] will display below the main information screen.

STEP 3. Click on the *External Routing* Ext.Rout button to the right of the document.

STEP 4. The external routing screen will appear. [See Illustration A-21 (pg13).]

STEP 5. Select the task from the drop-down menu and enter the text to be sent with your email.

STEP 6. Click on the white envelope icon to select recipients from the *Employee* list or input an email address. After adding all recipients, close the window.

STEP 7. Click the *Submit* button Submit at the bottom of the external routing screen.

STEP 8. The tree view will refresh and display the external routing.

b. Generate a Control Slip.

Place a current control slip on the cover of folders routed in hardcopy for signature or surname, and on the official file copy when a record is closed.

STEP 1. Open the record for which you wish to generate a control slip.

STEP 2. Click the Control Slip button located on the top menu bar of the tree view. [See Illustration A-10 (pg 7) – Tree View (Annotated).]

STEP 3. Type control slip comments, if desired, and then click the *Generate Control Slip* button Generate Control Slip at the bottom of the control slip screen.

STEP 4. Click the *View Control Slip* button View Control Slip to open the generated .pdf control slip. [See Illustration A-24 (pg 15) – Control Slip.]

STEP 5. If a control slip already exists and you wish to create a new one, click on the *New Control* Slip button New Control Slip and follow steps 3 and 4 above.

7. GENERATE OR SCHEDULE A REPORT

a. Setup a Workflow Report.

STEP 1. Check the *Workflow Report Setup* box that appears on the bottom-middle of the main information screen once a new record has been added. [See Illustration A-5 (pg 4)– Main Information Screen After Saving New Record.]

Once checked, a white envelope and a red clock will appear to the right of the checked box.

STEP 2. Click on the white envelope and select the names of the individuals who will receive reports on this particular record. Click the *Save* button and close the screen.

STEP 3. Click on the red clock and select the day and time the above individuals will receive the report. Click the *Save* button and close the screen.

STEP 4. When you no longer wish to receive the Workflow Report, open the record and uncheck the checkbox.

b. Generate a Standard Report.

STEP 1. Click on the *Reports* button on the navigation bar of the main information screen or click the *Reports* tab Reports above the tree view to open the reports screen. [See Illustration A-25 (pg 15)– Reports Screen.]

STEP 2. Select a report from the tree view of the reports screen.

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 Create Report.

STEP 6. Click the *View Report* button View Report. You can print or save the report to your computer.

c. Schedule a Report.

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.

STEP 3. Click the red clock to select the day and time to receive your report.

STEP 4. Click on the white envelope to select the email recipients.

STEP 5. Add email text to send with your report and click the *Save* button.

d. Stop a Report.

STEP 1. Select the report you want to stop receiving from the drop-down box below the *Create Report* button 

.

STEP 2. Click the *Stop* checkbox to stop the scheduled report for a period of time or click the *Delete* button to eliminate the report entirely.

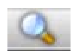
STEP 3. Uncheck the *Stop* checkbox to resume receiving a scheduled report.

8. SEARCH FOR RECORDS

a. Search by Document Control Number.

STEP 1. From the Control Center, select the desired database from the drop-down menu under *Quick Search* and enter the DCN of the record you want to view. Click *Go*. [See **Illustration A-1 (pg 1) – Control Center Screenshot (Annotated).]**

b. Perform a Basic Search.

STEP 1. Click on the *Search* button  on the navigation bar of the main information screen or click the *Search* tab 

above the tree view to open the search screen. [See Illustration A-26 (pg 16)– Search Screen.]

STEP 2. Enter the criteria for your search in each applicable *Search Criteria* field. Use the following searching operators to scope your search: = Equal to the value specified; ~ Not equal to the value specified; * Containing the value specified.

STEP 3. Select output and sort order from the appropriate *Search Results* fields.

STEP 4. Click the *Submit* button 

.

c. Perform an Advanced Search.

STEP 1. From the search screen, select the *Advance Search Screen* button 

to select the advance search screen. [See Illustration A-27 (pg 16)– Advanced Search Screen.]

STEP 2. Enter the criteria for your search in the appropriate *Document, Addressee,* and *Routing* fields. Use the following searching operators to scope your search: = Equal to the value specified; ~ Not equal to the value specified; * Containing the value specified.

STEP 3. Select output and sort order from the appropriate *Search Results* fields.

STEP 4. Click the *Submit* button 

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9. QUICK GO TO REVIEWING, EDITIING, VERSIONING, AND SURNAMING

After logging into DTS, select the document you want to review from your inbox (you will be taken directly to your routing if you clicked the link from an email notification).

a. Click on the Attachment icon in the Tree View or on the Attachment branch in the tree.

b. In the Attachment screen (lower left hand portion of the screen) click on the Document Icon in the View column next to the document you want to review and click SAVE.

c. Save the document to your desktop (or another folder of your choice) and then Click OPEN. This will open the document from where you just saved it to (not from DTS).

d. Edit the document and Save it before exiting the program you are working in. **(Do not change the name of the document.).** You should now be back at your DTS screen, if not, go back to the DTS record you were working in – the Attachments screen.

e. Under the DETAIL tab of the document you just edited, click on the New Version "V" button.

f. Click on "Upload Version" - Type in brief document description "Memo, Correspondence Brief, Letter" - This does not have to be detailed, because the actual file name provides the document detail.

f. Browse for the document you just edited – should be on your Desktop (or the folder you chose).

g. Highlight the document by clicking on it (document name should appear in the File Name block) and then click on the OPEN button.

i. Click on the SAVE button at the bottom of the Attachments screen.

j. Click on the GO BACK button and it should show the version you just uploaded (Version # and your name as the Author).

** If you need to version more than one document in the record, complete items a. through j. again.

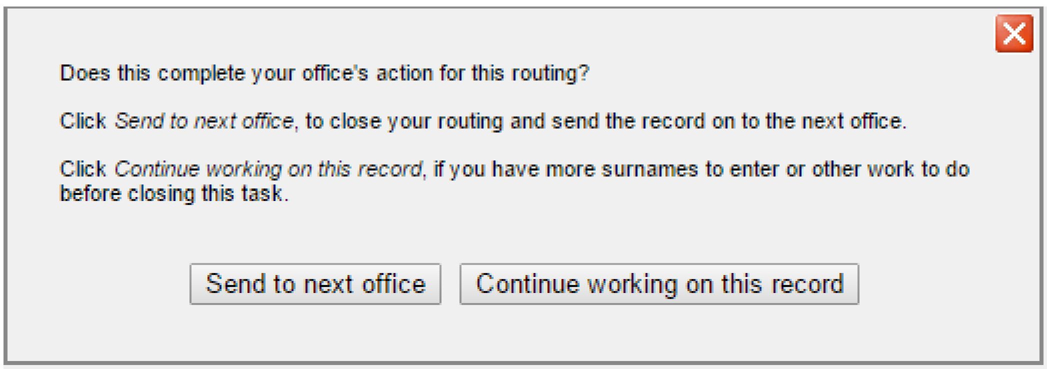
1. **To surname:**
   a. Click on your office routing folder under the Routings branch in the tree.
   b. Click the Surname tab in the Routings screen, enter a comment and your title (both are optional), and click the checkbox(s) of the document(s) you are surnaming
   c. Click the SAVE THE SURNAME button on the right side of the routing screen.

If you do not want to surname the document(s) and want the originating office to take action, stop here and notify the originating office by phone or email that action is needed before you will surname.

Once the originating office has taken requested action, they should notify your office by placing a check the send email box again.

A. MOVING RECORDS FORWARD

When you have completed your editing, versioning and surnaming a pop-up box will appear.



Select "Send to next office".

Your work is done.

10. QUICK GUIDE TO CREATING, ROUTING, SURNAMING, AND VERSIONING A PACKAGE

A. <u>CREATING A PACAKGE</u>

To create a package in DTS there are ***4 basic steps*** you have to take. After you have selected "Add a New Record" from the top icon bar  the screen will display a series metadata "tags" for you to use from the information "table."

1. **Create the information "tags" in the information table:** you must decide what you have to do with the package. Selections that are <u>underlined</u> are required to be selected. Remember – these are data tags – ways to identify and find a package at a later date and to tell people about the package. THEY DON'T AFFECT THE PACKAGE OR DATA.
   Required actions:
   a. <u>In/Out</u>: Click on the drop down labeled "Select In-Out" and select either "Incoming or Outgoing Document." Examples of each: If you are generating a document such as a BID or a memo it would be an Outgoing Document. If you are responding a request from an operator or a Congressional request, it would be an incoming document.
   b. <u>Action:</u> From the drop down "Select Action Code" for what action is to be performed on the document. There are only 3 choices – Appropriate Action, Surname, or Signature.
   c. <u>Document Type:</u> Select the document type from the drop down table. There are many document types. Select the most appropriate type. Remember – this is a data tag and doesn't affect the document.
   d. <u>Subject:</u> The subject of the package. Type in a descriptive title or label for the package that will tell folks you are routing this to for further actions about the document you are routing.
   e. <u>Input Date:</u> Auto-populated
   f. <u>Orig. Office</u>: Auto-populated based on who is logged in and creating the package
   g. Optional items:
      i. <u>Synopsis</u>: This supplies more context to those to whom the package is routed, and is part of the e-mail that is routed to others for action.
      ii. <u>Other optional items</u>: anything else you add will supply further information to use to look it up from the database at a later time.

   h. **SAVE THE PACKAGE: once you have set up all the data tags, select the**  **icon.** The next step will automatically popup – **ADDRESSEES**

2. **Addressees:** Once you save the package the ADDRESSEE window pops up on the right had side of the screen. In the bottom left part of the screen you have the option to select from addressees in the data base already or to build your own. You must insert the person, office, organization etc…that the document or package is destined for. **THIS IS NOT ROUTING,** this is the person the final product is being created for. **DTS WILL NOT** automatically send to this address. The person who finalizes the package will have to send the product to the addressee**.**

a. If the person or office is in the database you can look them up by selecting and then scrolling through the office or name addresses in the data base.

b. If the address isn't present you can build your own by selecting the button. A set of entry screens will appear in the addressee screen and you can enter the appropriate information. After you put in the information, or select the addressee from the existing address of the person or office select the button and the address will appear at the top right of the screen and the routing and attachment icons will appear. You have now completed task 2.

3. **Build the Package:** You must now add the attachment(s) that constitute the package.
   a. Click on the icon in the right hand screen that looks like this: attachments. When you do on the bottom right a window will appear that will have this icon Upload.
   b. When you click on that icon a table will appear. As with other items anything that is underlined must be filled in to complete this task. The "author" is automatically filled in for you. All you have to add is a Description of the document (another data tag) and then select the "Choose File" button and on your screen the windows explorer window will pop up.
   c. Find the document, power point package, excel workbook, etc., and click on the file you want to add.
   d. The DTS attachments screen will pop back up and you select the Save icon. This will add the item to your DTS package. If you have more items to add to the package select the Go Back icon and repeat step "c" above. You now have a package to route.
4. **Route the package:** The final step is to route the package to the offices or people that you want to take actions or inform with the DTS package. Specific **ROUTING** instructions follow.

Congratulations! You have now created your DTS package!

B. ROUTING

A package in DTS can be routed sequentially or simultaneously.

1. **Sequential routing**: When routing a package through DTS sequentially there should only be one folder open at a time.
   a. Set up your DTS record and select the offices or personnel you want to take specific actions. Select electronic routing, the actions from the drop down menu you want that person/office to take, and then select the office or person. DO NOT ASSIGN A TASK DATE to any routing EXCEPT the first one in the routing list, only that folder will be BLUE, the others will be YELLOW. Check "SEND E-MAIL. You can assign a due date if you wish.

b. Click the SAVE THE ROUTING  button on the right side of the routing screen.
c. If you are in the routing chain, and have completed the assigned action, you are ready to route a package to the next office. Fill in your "TASK COMPLETED DATE" .by selecting the pop-up calendar and clicking on the day of completion. Click the SAVE THE ROUTING button on the right side of the routing screen.
d. A pop-up will appear on the screen that will say "Are you ready to send the record to the next office? There are two tiles to select from:
   i. **"Send it Now"** – this should always be your selection unless you are adding a routing to send the package to an additional party for review or other action
   ii. **"No, just close my routing"** is the other action available to you. This will rarely, if ever, be used (e.g. you want to reroute it to someone internal to review or revise).
e. Once you have made your selection the package will move on to the next person in the routing chain (unless you chose to close your routing).

2. Simultaneous routing: Sometimes there are multiple office assignments where every office has to complete a specific task. The DTS record is assigned to everyone at once and offices or individuals should download the required documents and close out their file folder once their task has been completed.

   a. The difference between this procedure and the one identified in 1.a. above is you ASSIGN A TASK DATE to each routing in the table.
   b. Check the **"SEND E-MAIL"** box for each routing you build in your record
   c. All the routing folder will be BLUE

C. REVIEWING, EDITIING, VERSIONING, AND SURNAMING

1. **Reviewing and Editing:** After logging into DTS, select the document you want to review from your inbox (you will be taken directly to your routing if you clicked the link from an email notification). 

   a. Click on the Attachment icon  in the Tree View or on the Attachment branch in the tree.
   b. In the Attachment screen (lower left hand portion of the screen) click on the Document Icon  in the View column next to the document you want to review and click SAVE.
   c. Save the document to your desktop (or another folder of your choice) and then Click OPEN. This will open the document from where you just saved it (not from DTS).
   d. Edit the document and Save it before exiting the program you are working in. **(Do not change the name of the document.).** You should now be back at your DTS screen, if not, go back to the DTS record you were working in – the Attachments screen.

e. Under the DETAIL tab of the document you just edited, click on the New Version "V" button.

f. Click on "Upload Version" - Type in brief document description such as "Memo, Correspondence Brief, or Letter" - This does not have to be detailed, because the actual file name provides the document detail.

g. Browse for the document you just edited – should be on your Desktop (or the folder you chose).

h. Highlight the document by clicking on it (document name should appear in the File Name block) and then click on the OPEN button.

i. Click on the SAVE button at the bottom of the Attachments screen.

j. Click on the GO BACK button and it should show the version you just uploaded (Version # and your name as the Author).

**If you need to version more than one document in the record, complete items a. through j. again.

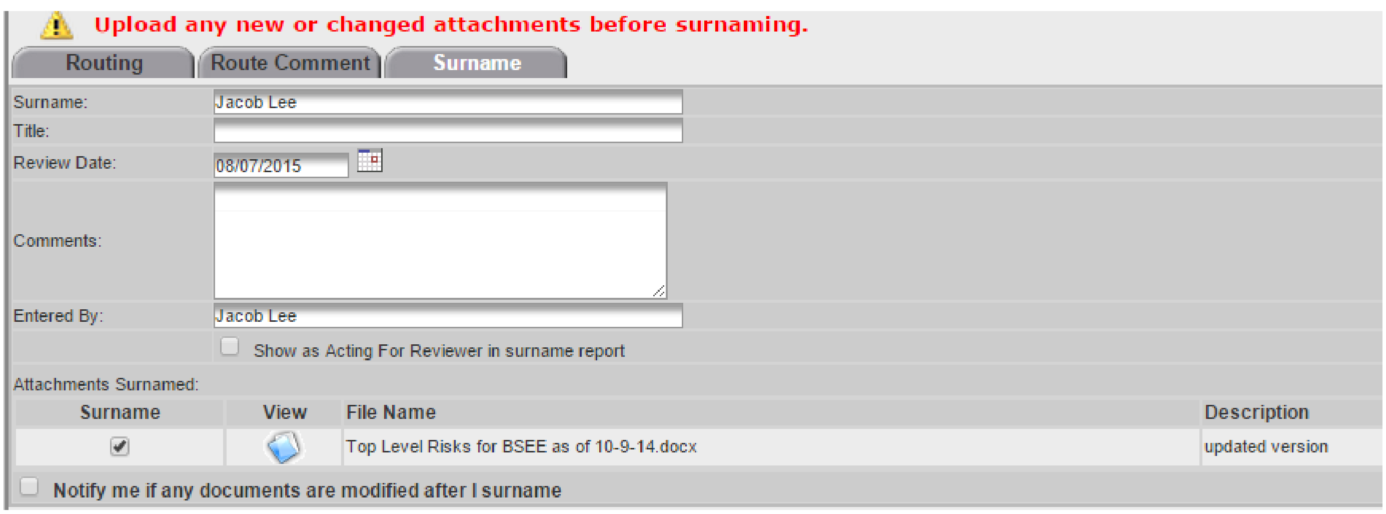
2. **To surname:**

a. Click on your office routing folder under the Routings branch in the tree.

b. Click the Surname tab in the Routings screen, enter a comment and your title (both are optional), and click the checkbox(s) of the document(s) you are surnaming

c. Click the SAVE THE SURNAME button on the right side of the routing screen.

d. You will see the following screen:



This is a reminder to ensure that you've loaded a document if you made changes or updates after review. Additionally, there is a box you can check to receive notification if a document you've surnamed has been modified after you've approved it.

If you do not want to surname the document(s) and want the originating office to take action, stop here and notify the originating office by phone or email that action is needed before you will surname.

If a document you have surnamed is changed you will receive an e-mail that looks like this:

DTS@fws.gov

to leeja

A document you surnamed in DTS has been updated with a newer version (see attached). Please review the updated document. If required, please log in to DTS and update your surname to reference the updated version.

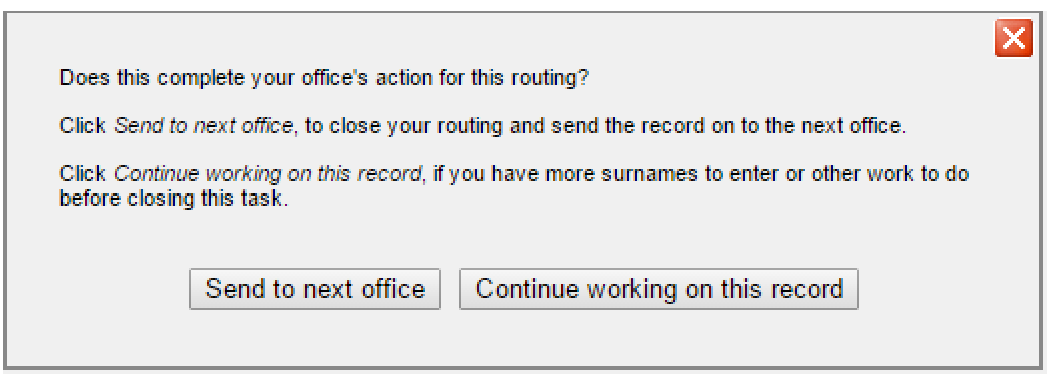
Document Information:
DCN: TRN0002697
Subject: Welcome to the Data Tracking System
Attachment Name: Top Level Risks for BSEE.docx
Attachment Subject: happy to glad
Updated By: Lee, Jacob
Locator: https://dts.fws.gov/dts/preEditMaster.do?masterid=301165

The changed document will also be attached to the e-mail.

Once the originating office has taken requested action, they should notify your office by placing a check the send email box again.

D. MOVING RECORDS FORWARD

When you have completed your editing, versioning and surnaming a pop-up box will appear.



Select "Send to the Next Office"

The document has now been moved on to the next office routing (their folder should turn BLUE).

Your tasks are complete for this package.