

**U.S. Department of the Interior
Assistant Secretary — Policy,
Management and Budget**



**Data Tracking System
User Manual**

June 2010

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ACCESSING THE DTS SYSTEM (Use Internet Explorer 6 or higher; or Mozilla Firefox)

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

- Step (1)** Go to the following link:
<https://dts.fws.gov>
<https://staging.fws.gov/dts> (Test Server)
- 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. Department of the Interior

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"/> mnash-PMB	PMB/PMB	DTS Admin
<input type="radio"/> margie -SOL	SOL/SOL	DTS Admin
<input type="radio"/> Margie Nash-Adm	WGS/D	DTS Admin
<input type="radio"/> MBNash	FWS/DTS-Support	DTS Admin
<input type="radio"/> MNash	SIO/OES	DTS Admin
<input type="radio"/> MNash	SIO/OES-Nash/703-533-0592	DTS Admin
<input type="radio"/> MNash-PMB-user	PMB/DBPA	DTS Users

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 allows the user to create/edit predefined routings
8. *Help* button allows user to turn on/off tool tips and set screen size
9. *Reports* button takes the user to the Reports Screen to create and schedule reports



- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

Record	DCN	Task Assigned	Task Due Date	Last Name	Subject
	PMB0000006	06/09/2010 (2)	N/A	Doe	Request copy of Correspondence Handbook
	PMB0000005	06/09/2010 (2)	05/13/2010	Feinstein, Boxer, Costa, Radanovich, Cardoza	San Joaquin River Restoration Settlement Act
	ESO-00002474	05/25/2010 (1)	06/02/2010	Feinstein, Boxer, Costa, Radanovich, Cardoza	San Joaquin River Restoration Settlement Act
	PMB0000002	11/06/2009 (3)	11/23/2009	Lewis	Another test record
	PMB0000001	11/06/2009 (2)	11/27/2009	Salazar	Test Record

System Messages

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

Select User Account

If you have more than one account in DTS, you can change to another account by selecting from the dropdown 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.

Tip of the Week

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

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 (indicates the record was assigned electronically) or (indicates record was assigned as hard copy) to access a record assigned to your office and take appropriate action
- Up/Down arrows to reverse order of presentation

Application: DTS | Username: margie_nash@fws.gov | Office: PMB | Today's Date: 06/21/2010

Data Tracking Administration Training Help

Home [Navigation Icons] Logout

Control Center [Outbox ▼] ←

Routing OutBOX

Record	DCN	Subject	Input	Due Date	Last Name	Tasks Complete	Assigned To	Assigned	Task Due	Close DCN
	TRN0000979	Request copy of Correspondence Handbook	06/04/2010 07/16/2010	D	1 of 1					
	TRN0000978	DTS User Manual	05/27/2010 N/A	PMB DTS Users	1 of 2	DBPA	05/27/2010	N/A		
	PMB0000007	Test record	06/09/2010 06/18/2010	Nash	1 of 1					
	PMB0000006	Request copy of Correspondence Handbook	06/09/2010 N/A	Doe	0 of 2	PMB	06/09/2010	N/A		
	PMB0000005	San Joaquin River Restoration Settlement Act	06/09/2010 05/13/2010	Feinstein, Boxer, Costa, Radanovich, Cardoza	0 of 1	PMB	06/09/2010	N/A		

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
- Task Assigned Date
- 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

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

Step (2) The PMB 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  at the top of the Main Information Screen 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 – Populates with your office. You cannot enter information in this field.

In/Out – Required field – An incoming document is one that is coming into PMB for response or other action. An outgoing document is one that originates within PMB that is not in response to an incoming. Select from the dropdown list.

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

Received – Date incoming letter/document was received in PMB. Press the calendar button to select appropriate date. Do not enter a date for an outgoing document.

Due Date – Overall due date that all tasks will be completed.

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.

Important – Click the  checkbox if document is urgent, rush, or an important item.

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

External Number – Use for another number related to your document; e.g., WH Referral number, RIN for Federal Register notices, Audit Numbers, etc.

ES No. – Control number assigned by Executive Secretariat.

ES Due Date – Executive Secretariat's due date

Subject – Required field. Enter brief subject of document. Be specific so you will be able to locate it in a search.

Synopsis – Further explanation of subject, if needed.

Ack Date – If an acknowledgement letter is sent, enter date by selecting from the calendar.

Interim Date – If an interim response is sent, enter date by selecting from the calendar.

XRef – Cross Reference - Enter DCNs of other records that pertain to this record.

Medium – Select how the letter/document was received 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.

Closed By – Name of user closing the record.

The screenshot shows the 'DTS-Database-PMB-Items=8' interface. It includes a search bar for DCN and ES No, and various input fields for document details such as DCN (PMB0000009), Input Date (06/21/2010), Orig. Office (PMB), In/Out (O-Outgoing document), Inc Date, Due Date, Action (4-Signature), Doc Type (B-Budget), Sig Level (DAS-Deputy Assistant Secretary), Subject (Test Record for DTS Training), Synopsis, Ack Date, Signed By, Sign Date, Interim Date, Medium (Select Medium), Xref, Closed Date, Lock Record, Work Flow Report Setup, NARA Retention, Closed By, Mail Tracking #, and Write-In (0). On the right, a panel titled 'Please add an Addressee to continue.' contains instructions: '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.' and a 'Show me how' link.

ADDRESSEE

After saving the core information for your record, scroll down to the Addressee Screen below the Main Information Screen.

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 Departmental office.

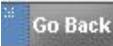
Outgoing document – The addressee is the name of the person to whom the correspondence is addressed or the acronym of the Departmental office.

Select a Name

The screenshot shows the 'Addressee' screen with a search bar labeled 'Search by Last Name:' and a search button. At the top right, there are 'Back' and 'Forward' navigation buttons. The screen also has tabs for 'Name' and 'Office'.

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

Step (1) 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.

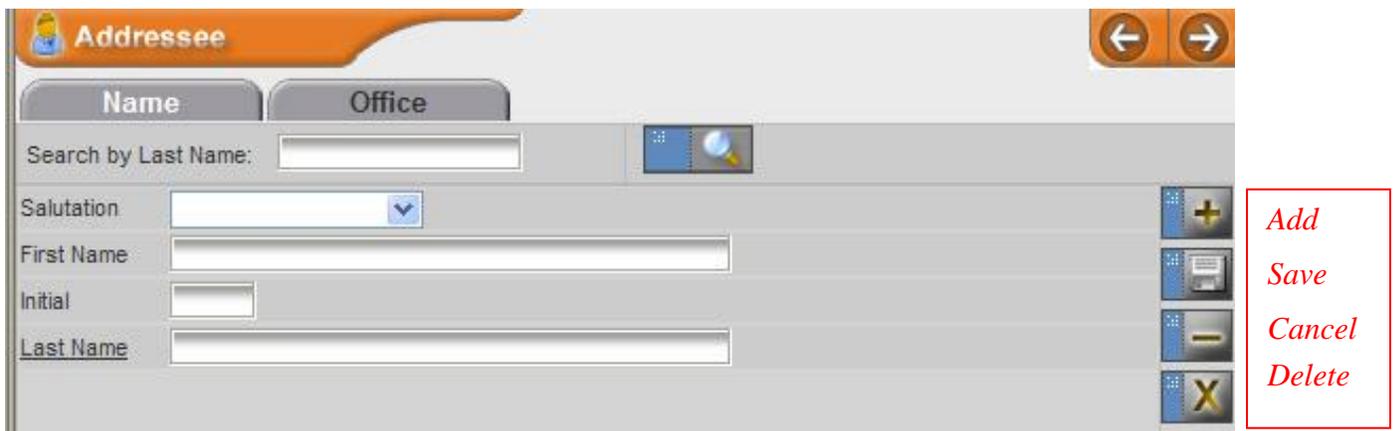
Note: If the correct name is not listed, click the Go Back button  (see Add a Name).

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

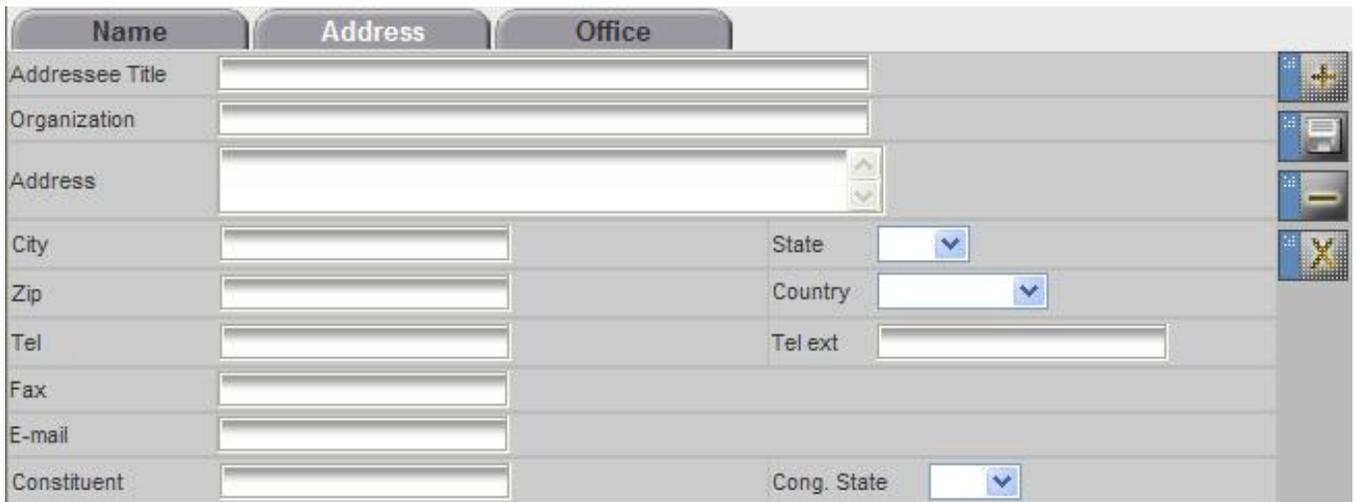
Step (3) To enter address information, click the Address tab and enter appropriate data. Click the Save Address button  (right side of addressee screen) to save the address information.

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.



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.



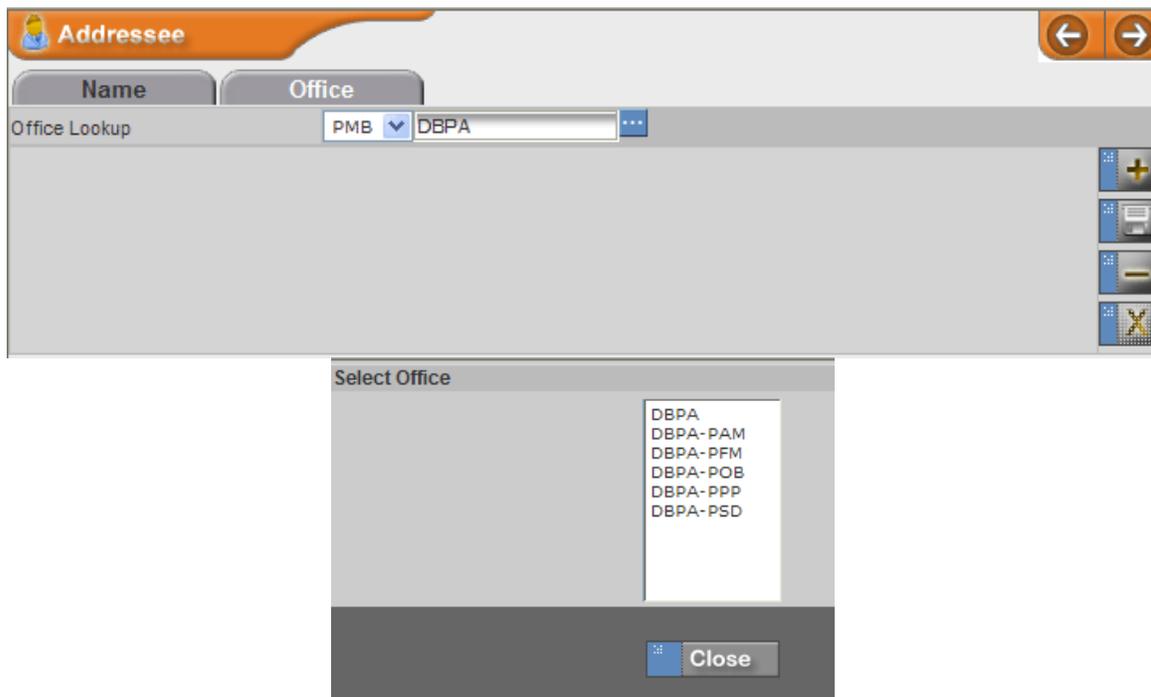
Select an Office

Step (1) Click the Office tab at the top of the Addressee Screen.

Step (2) Click the dropdown arrow to select the appropriate Bureau.

Step (3) Click the ellipsis button  to select the office.

Step (4) Click the Save Addressee button  on the right side of Addressee Screen to save the office acronym.



Note: You cannot add an office that is not in the office list. To add an office, call your DTS Administrator.

TREE VIEW

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

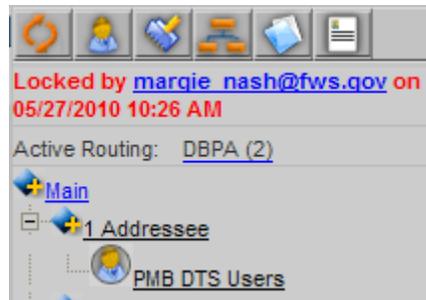


1. 2. 3. 4. 5. 6.

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 at the bottom left
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-center 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.

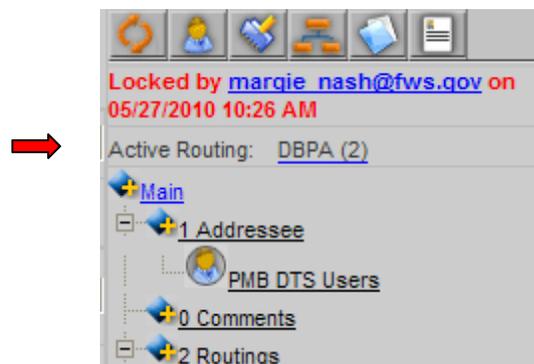


In your InBOX there is an icon of a lock if a record assigned to your office is locked. A green lock indicates the record was locked by you, and a red lock indicates the record was locked by another user.

Record	DCN	Task Assigned	Task Due Date	Last Name	Subject
	ESO-00002393	06/23/2010 (1)	05/05/2009	Roybal	RE: Rocky Mountain Arsenal Visitor Center Design and Construction
	PMB0000009	06/21/2010 (2)	N/A	PMB DTS Users	Test Record for DTS Training
	PMB0000006	06/09/2010 (2)	N/A	Doe	Request copy of Correspondence Handbook

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., DBPA (2) = assigned to DAS-Budget, Finance, Performance and Acquisition for Appropriate Action). 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

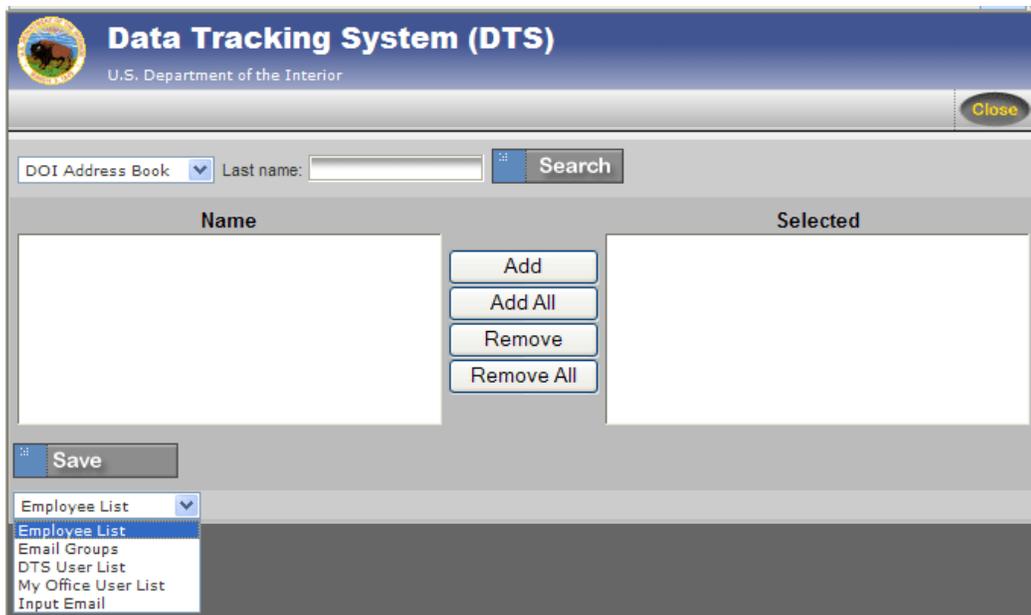
On the bottom-center of the Main Information Screen, there is a checkbox to set up a Work Flow Report. Use the work flow to keep track of individual records.

Interim Date	<input type="text"/>	Medium	Select Medium	Xref	<input type="text"/>
Closed Date	<input type="text"/>	<input checked="" type="checkbox"/>	Lock Record	<input checked="" type="checkbox"/>	Work Flow Report Setup
Closed By	<input type="text"/>	Mail Tracking #	<input type="text"/>	Write-In	<input type="text"/>

To set up a Work Flow Report:

Step (1) Check the Work Flow Report Setup 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	<input type="text"/> 
Sunday	<input type="text"/> 

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

 Save

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

NARA RETENTION –To denote a record to be retained for the National Archives and Retention Administration, check the NARA Retention checkbox on the lower right of the Main Information Screen.

MAIL TRACKING – Enter Certified Mail tracking number in this field.

WRITE-IN – For use when receiving multiple letters on the same subject—enter the number received.

COMMENTS

 **Comments**  

Comment Date:

Entered By:

Comment By:

These are overall comments regarding the record/document.







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) You may check the spelling of your comments by clicking the spell check button 

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

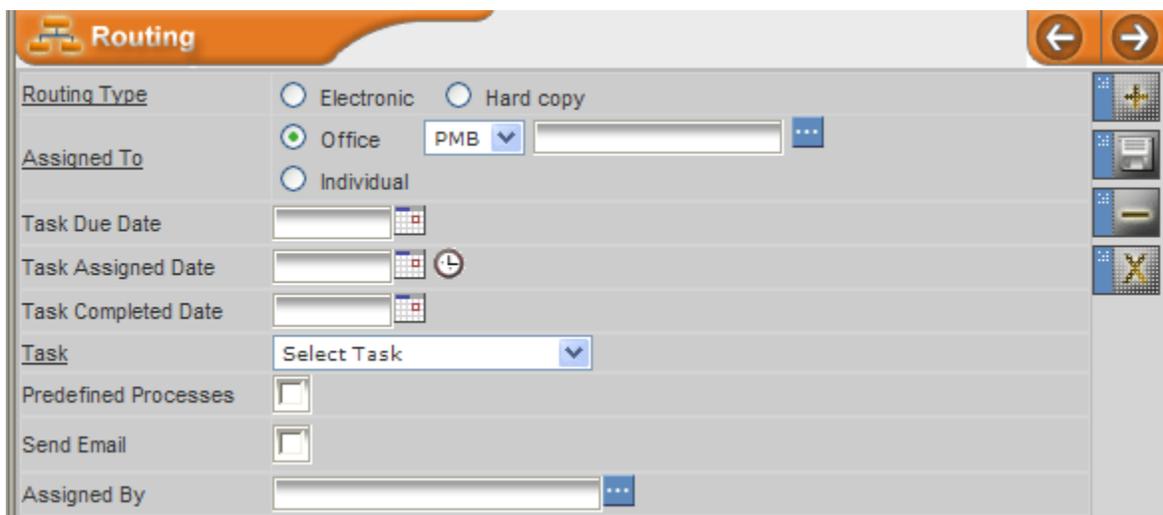
Note: These comments pertain to the overall record. See Routing Comments.

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) Enter the following:

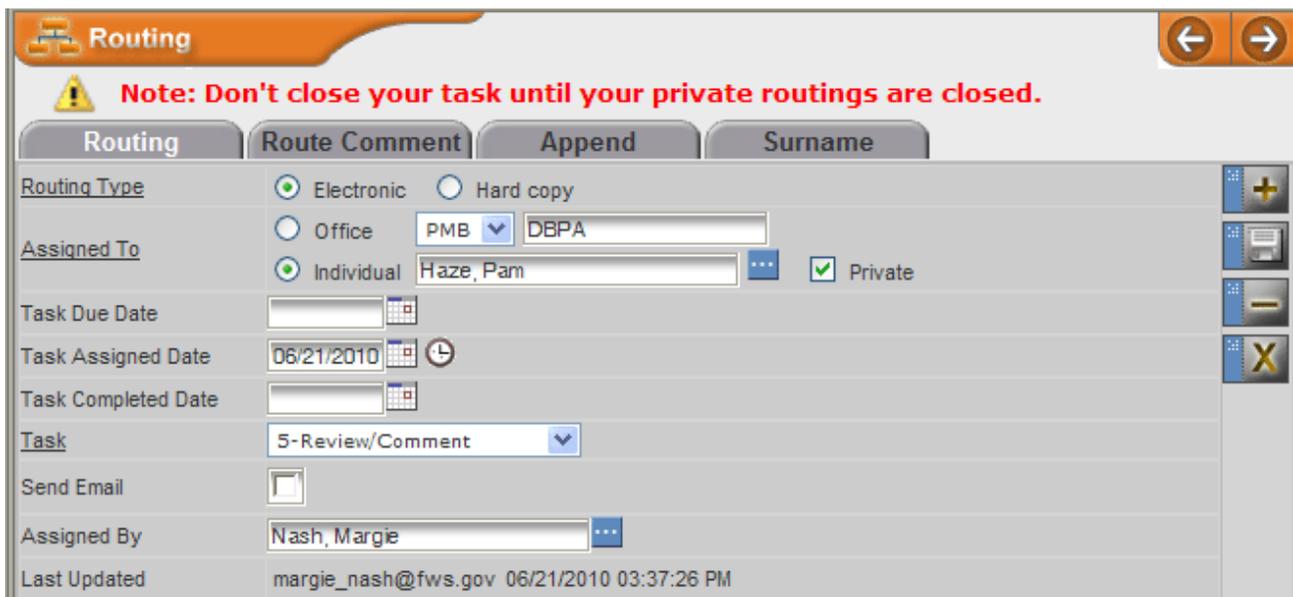
- ***Routing Type*** (required field): Select Electronic or Hard copy
- ***Assigned To*** (required field): Click the Ellipsis button  to select office.
- ***Task Due Date***: Enter due date for Assigned To office
- ***Task Assigned Date***: Enter date only when document is routed to Assigned To office
- ***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 18)
- **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



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.

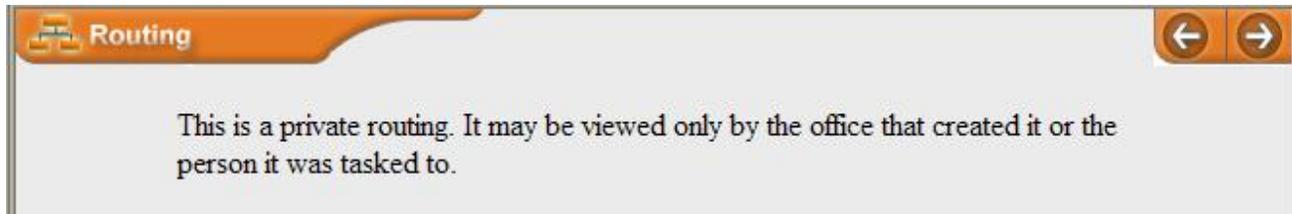
Step (2) Select Electronic or Hard copy; select Individual button in the Assigned To field, enter the individual's last name, and press the ellipsis to select the individual.

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 options:

- Routing Type:** Radio buttons for "Electronic" (selected) and "Hard copy".
- Assigned To:** Radio buttons for "Office" and "Individual" (selected). The "Office" dropdown is set to "PMB" and "DBPA". The "Individual" dropdown is set to "Haze, Pam". A "Private" checkbox is checked.
- Task Due Date:** A date picker field.
- Task Assigned Date:** A date picker field set to "06/23/2010".
- Task Completed Date:** A date picker field.
- Task:** A dropdown menu set to "5-Review/Comment".
- Send Email:** A checkbox.
- Assigned By:** A dropdown menu set to "Nash, Margie".
- Last Updated:** "margie_nash@fws.gov 06/23/2010 12:43:08 PM".

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

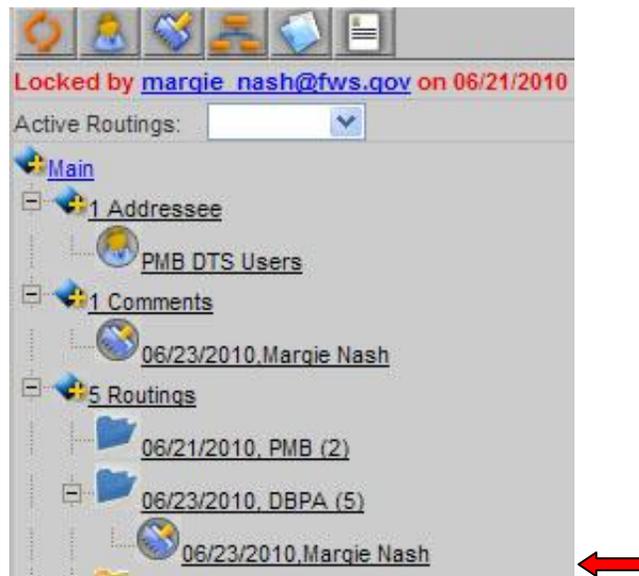
The screenshot shows the "Comments" screen with the following fields and content:

- Comment Date:** "06/21/2010 03:40 PM".
- Entered By:** A field containing "Margie Nash".
- Comment:** A text area containing "Pam -- Please look this over and let me know what you think. Thanks".

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.

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 Routing Comment.



Insert a Routing Between Two Existing Routings

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

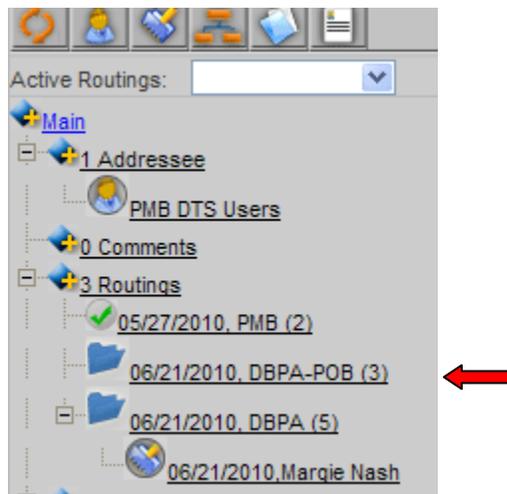
Step (1) Click the routing that is below where you want to insert your new routing.

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

Step (3) Enter the following:

- Routing Type (required field): Select Electronic or Hard copy
- Assigned To (required field): Click the Ellipsis button  to select the new 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 18)
- Send Email: Click this box if you wish to send an email to the Assigned To office
- Assigned By: DTS will enter automatically.

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.

Surnames

To enter surnames for your documents:

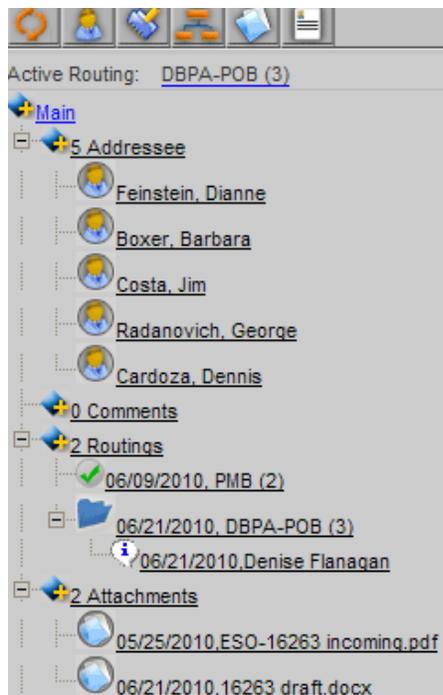
Step (1) Click on the routing in the tree that you want to add the surname to.

Step (2) Click the Surname tab  in the Routing Screen

Surname	File Name	Subject	Version	Date
<input type="checkbox"/>	ESO-16263 incoming.pdf	Incoming		05/25/2010
<input checked="" type="checkbox"/>	16263 draft.docx	Draft response		06/21/2010

- Step (3)** Enter the following
- *Name* and *Title* of person who surnamed
 - *Review Date* defaults to today; if different, select from calendar
 - *Comments*, type comments if any
 - *Entered By* automatically entered by DTS
 - *Attachment*, click the checkbox of the surnamed attachment

Step (4) Click the Save button  on the right side of the Routing Screen. The surname is indicated in the Tree by the  icon.



Step (5) DTS automatically creates and adds a Surnames Report to the Attachments Screen. The report updates as each surname is entered.

View	File	Description	Date	Version	Author	Detail	Ext.Rout
	ESO-16263 incoming.pdf	Incoming	05/25/2010		Margie Nash		
	16263 draft.docx	Draft response	06/21/2010		Margie Nash		
	Surnames Report						

PREDEFINED PROCESSES

Create a Predefined Process

Routing

DTS-Predefined Process- Help

Current Processes

Process Code

Description

Private Process

Add Save Cancel Delete

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

Step (2) Description (required), type a name for your process in the Description field.

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

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



Step (5) Click the Routings tab.

DTS-Predefined Process-000000368 Help

Process Name Routings View

Select an Agency SIO

Assign to Office
 Assign to Individual

Task 11-Simultaneous Surname

Anticipated Turnaround Days 0

Forward/Back

Add Save Cancel Delete

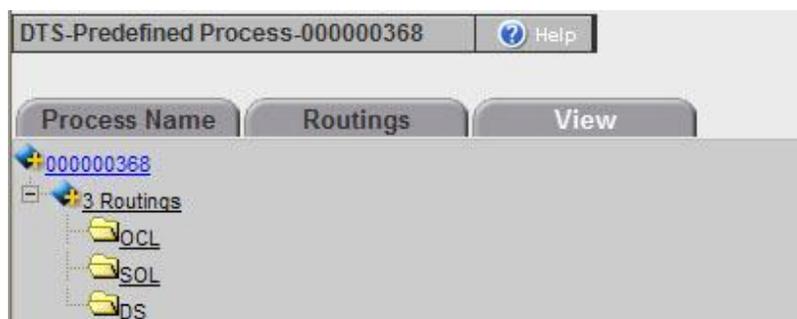
Step (6) Select an agency, office, task, and the anticipated turnaround days (turnaround days is optional).

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

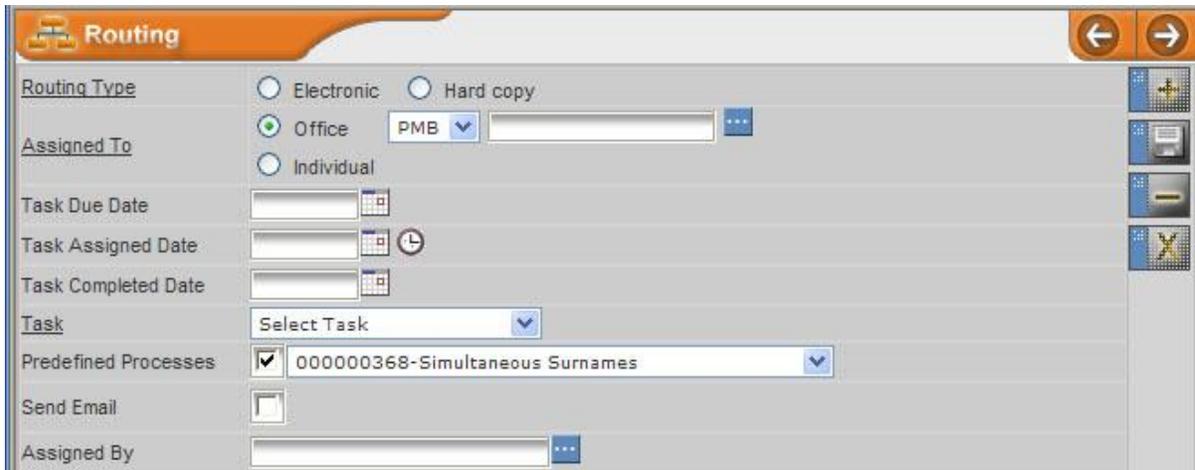
Step (7) Click the **Save** button.

Step (8) Click the **Add** 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



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

- Routing Type:** Radio buttons for 'Electronic' and 'Hard copy'.
- Assigned To:** Radio buttons for 'Office' (selected) and 'Individual'. A dropdown menu shows 'PMB' and an empty text field.
- Task Due Date:** Empty date field with a calendar icon.
- Task Assigned Date:** Empty date field with a calendar icon and a clock icon.
- Task Completed Date:** Empty date field with a calendar icon.
- Task:** Dropdown menu with 'Select Task'.
- Predefined Processes:** Checked checkbox and dropdown menu showing '000000368-Simultaneous Surnames'.
- Send Email:** Empty checkbox.
- Assigned By:** Empty text field with a dropdown arrow.

Step (1) Click the Add Routing  button located over the Tree View or click the Routings heading in the Tree.

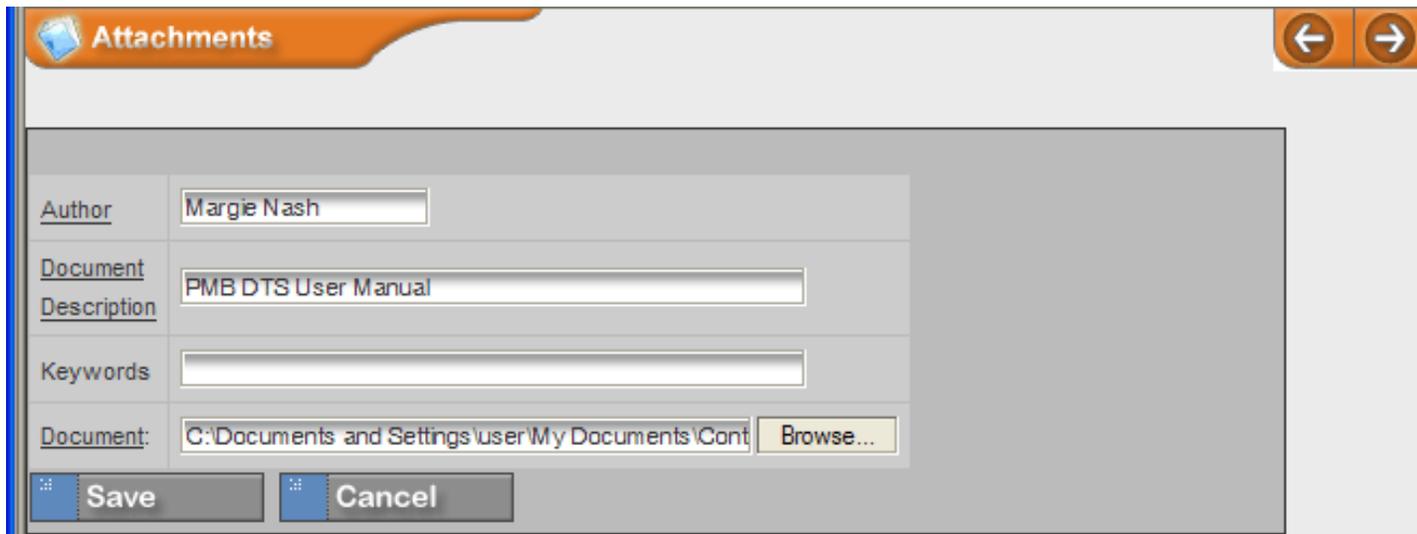
Step (2) Enter the Task Due Date and Task Assigned Date (*optional*).

Step (3) 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 Routings. The Tree will automatically refresh displaying your predefined routings.

ATTACHMENTS

Upload an Attachment



The screenshot shows a web-based form titled "Attachments". The form has a header bar with a folder icon and the word "Attachments". Below the header, there are several input fields: "Author" with the text "Margie Nash", "Document Description" with the text "PMB DTS User Manual", "Keywords" which is empty, and "Document" with the text "C:\Documents and Settings\user\My Documents\Cont" and a "Browse..." button. At the bottom of the form, there 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:

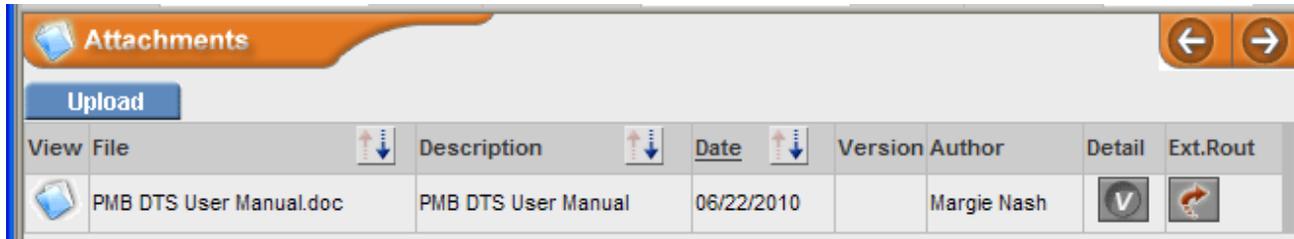
- Author (required field): Type name of author
- Document Description (required field): Type brief description of file
- Key Words (optional): Type keywords from the document
- Document (required field): Click the BROWSE button and locate the file you want to attach

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



Step (1) Click the Attachments heading in the Tree. The Attachments Screen will display below the Main Information Screen.

Step (2) Click the Attachment icon 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 the Attachments heading in the Tree View.

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

Task: 5-Review/Comment

Email Subject: DCN: PMB0000009 - PMB DTS User Manual

Email Text:

Attachments: PMB DTS User Manual.doc

Select email recipients to receive your message:

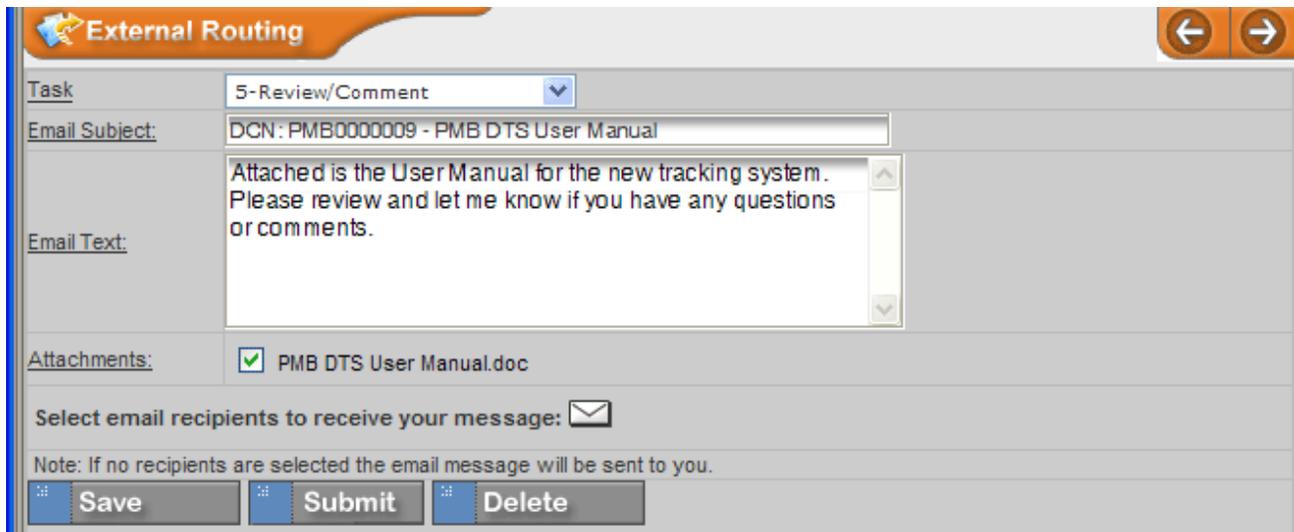
Note: If no recipients are selected the email message will be sent to you.

Save Submit Delete

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

Step (4) Click the white envelope to select recipients or input email address.

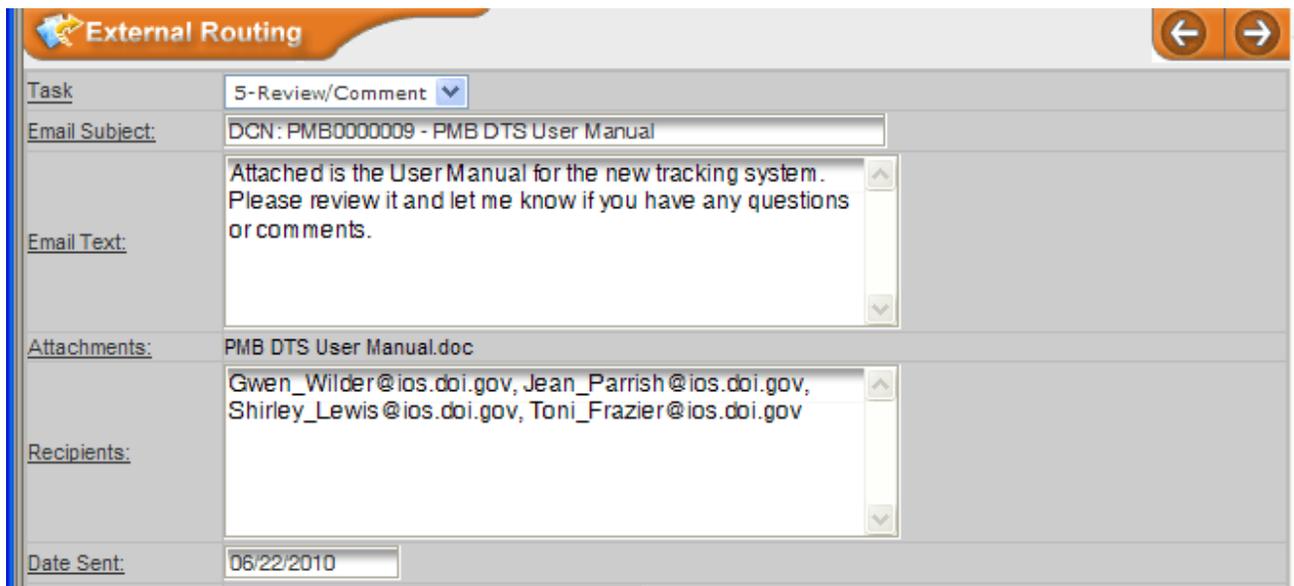
Step (5) Click the  button.



The screenshot shows the 'External Routing' form. At the top, there is a title bar with a left arrow and a right arrow. Below the title bar, the form contains the following fields and controls:

- Task:** A dropdown menu with '5-Review/Comment' selected.
- Email Subject:** A text box containing 'DCN: PMB0000009 - PMB DTS User Manual'.
- Email Text:** A text area containing the message: 'Attached is the User Manual for the new tracking system. Please review and let me know if you have any questions or comments.'
- Attachments:** A checkbox labeled 'PMB DTS User Manual.doc' which is checked.
- Select email recipients to receive your message:** A button with an envelope icon.
- Note:** 'Note: If no recipients are selected the email message will be sent to you.'
- Buttons:** Three buttons labeled 'Save', 'Submit', and 'Delete' are visible at the bottom.

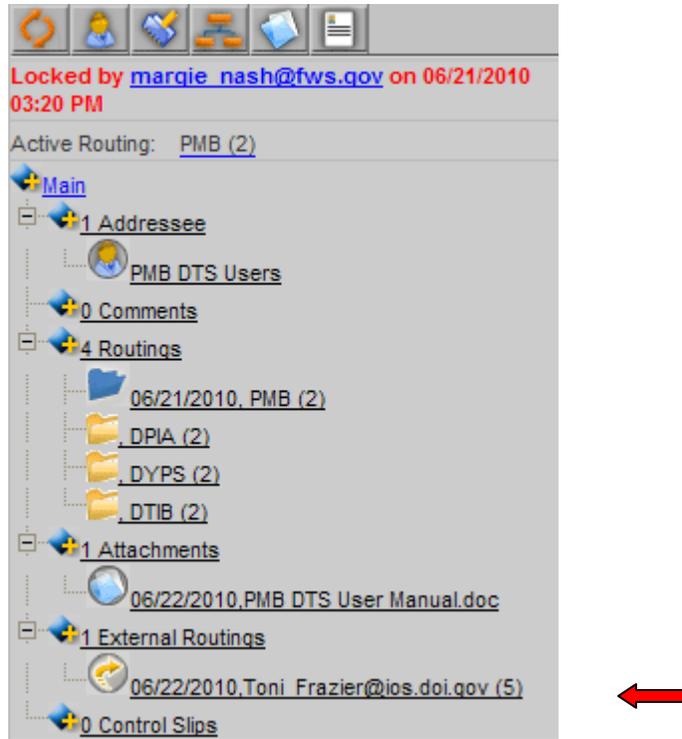
Step (6) Click the  button.



The screenshot shows the 'External Routing' form after clicking the 'Submit' button. The form is now populated with recipient information:

- Task:** A dropdown menu with '5-Review/Comment' selected.
- Email Subject:** A text box containing 'DCN: PMB0000009 - PMB DTS User Manual'.
- Email Text:** A text area containing the message: 'Attached is the User Manual for the new tracking system. Please review it and let me know if you have any questions or comments.'
- Attachments:** A text box containing 'PMB DTS User Manual.doc'.
- Recipients:** A text area containing the email addresses: 'Gwen_Wilder@ios.doi.gov, Jean_Parrish@ios.doi.gov, Shirley_Lewis@ios.doi.gov, Toni_Frazier@ios.doi.gov'.
- Date Sent:** A text box containing '06/22/2010'.

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

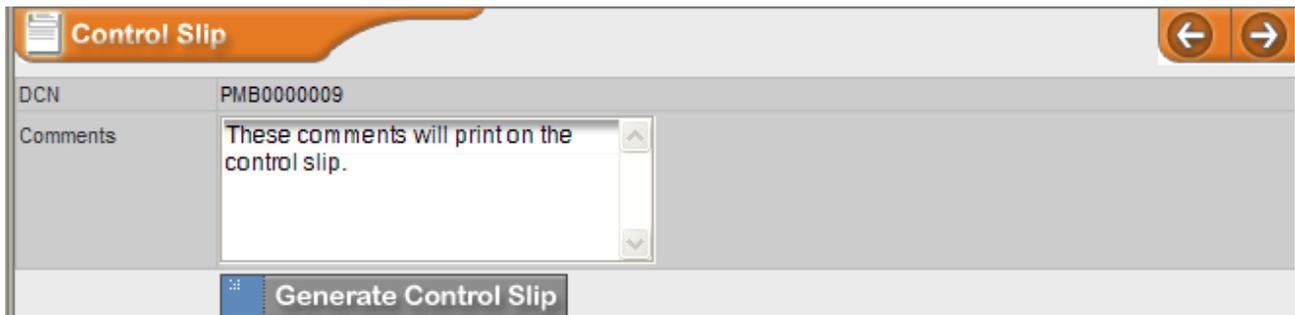


CONTROL SLIP

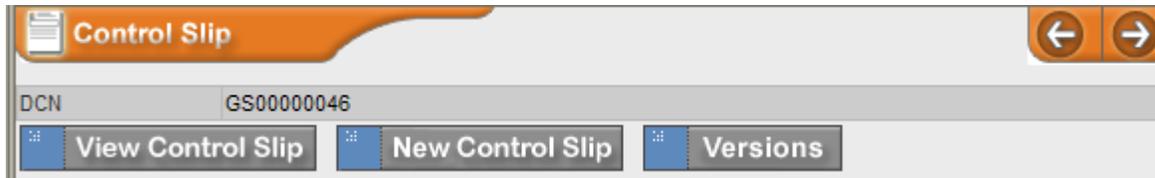
Note: To generate a Control Slip, you must have the record showing in the Main Information Screen.

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

Step (2) Click the Generate Control Slip button.



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



The Control Slip is automatically attached to your record. If you make changes, you will need to generate a new one.



Data Tracking System (DTS) Control Slip

Attach to front of folder
Date: 06/22/2010

DCN: PMB0000009		ES No:
Orig Office: PMB	Input Date: 06/21/2010	Addressee: PMB DTS Users,
Due Date:	Signature Level: DAS	
Subject: Test Record for DTS Training		

Comments:
These comments will print on the control slip.

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	Action	Task Assigned Date	Task Completed Date
PMB	2 - Appropriate Action	06/21/2010	
DPLA	2 - Appropriate Action		
DYPS	2 - Appropriate Action		
DTIB	2 - Appropriate Action		

SEARCHING

Search By DCN

The screenshot shows a web application interface for searching PMB items. At the top, there is a navigation bar with icons for Home, back, forward, refresh, add, search, and help. Below this is a header area with 'DTS-Database-PMB-Items=8' and a 'Help' button. The main form area contains several fields: 'Search for DCN' (with '009' entered), 'ES No', and a 'Go' button. Below these are various filters: 'DCN', 'In/Out', 'Input Date' (06/22/2010), 'Inc Date', 'Received', 'Orig. Office' (PMB), 'Due Date', 'Action' (Select Action Code), 'Doc Type', 'Sig Level', 'Subject', 'Synopsis', 'Ack Date', 'Signed By', 'Sign Date', 'Interim Date', 'Medium' (Select Medium), 'Xref', 'Closed Date', 'Lock Record', 'NARA Retention', 'Closed By', 'Mail Tracking #', and 'Write-In'. A red arrow points to the 'Go' button in the search section.

Step (1) On the Main Information Screen, enter the DCN of the record you want to view in the Search for DCN field. You have to enter at least the last three digits of the number.

Step (2) Click 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

The screenshot shows the 'DTS-Search Database-PMB-Items=8' search screen. It features a navigation bar with 'Main', 'Search', and 'Reports' tabs. The search criteria section includes: 'DCN' (dropdown), 'Subject' (dropdown), 'Input Date' (calendar), 'Due Date' (calendar), 'Orig. Office' (dropdown), 'Last Name' (dropdown), and 'ES No' (dropdown). Below this are 'Result Options' (A - View Report in Summary screen), 'Exclude Routing' (checkbox), 'Sort Order' (DCN, Ascending, Descending), and 'Max Results' (200). At the bottom, there are 'Submit' and 'Advance Search Screen' buttons.

Step (1) Click the  button on the Navigation Bar or the  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.

Result Options:
 Sort Order: Ascending Descending

Step (4) Press the button.

Note: All date fields in the search screens are date range. If you are searching for a record for a particular date, you must enter the date in both fields.

Data Tracking System (DTS)
 U.S. Geological Survey, U.S. Department of the Interior

DTS - Date Range Selector

Input dates below to create a date range:
 From Date:
 To Date:

Advance Search

DTS-Search Database-PMB-Items=9

Main Search Reports

PMB National Database All records

Document

DCN Input Date Orig. Office
 Closed Date Inc Date Due Date
 Action Doc Type Sig Level
 External No ES No ES Due Date
 Subject Synopsis Xref
 Sign Date Signed By Attachment Description
 Mail Tracking Num NARA Retention Attachment Date

Addressee

Last Name Addressee Office Author
 Organization Cong. State Constituent

Routing

Assigned To Task Assigned By
 Task Assigned Date Task Due Date Task Completed Date
 Assigned To Person

Search Results

Output: A - View Report in Summary screen Exclude Routing Sort Order: DCN Ascending Descending Max Results: 200

Submit Reset

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

REPORTS

Standard Reports

DTS-Reports

Standard

Select a report to run from the list to your right:

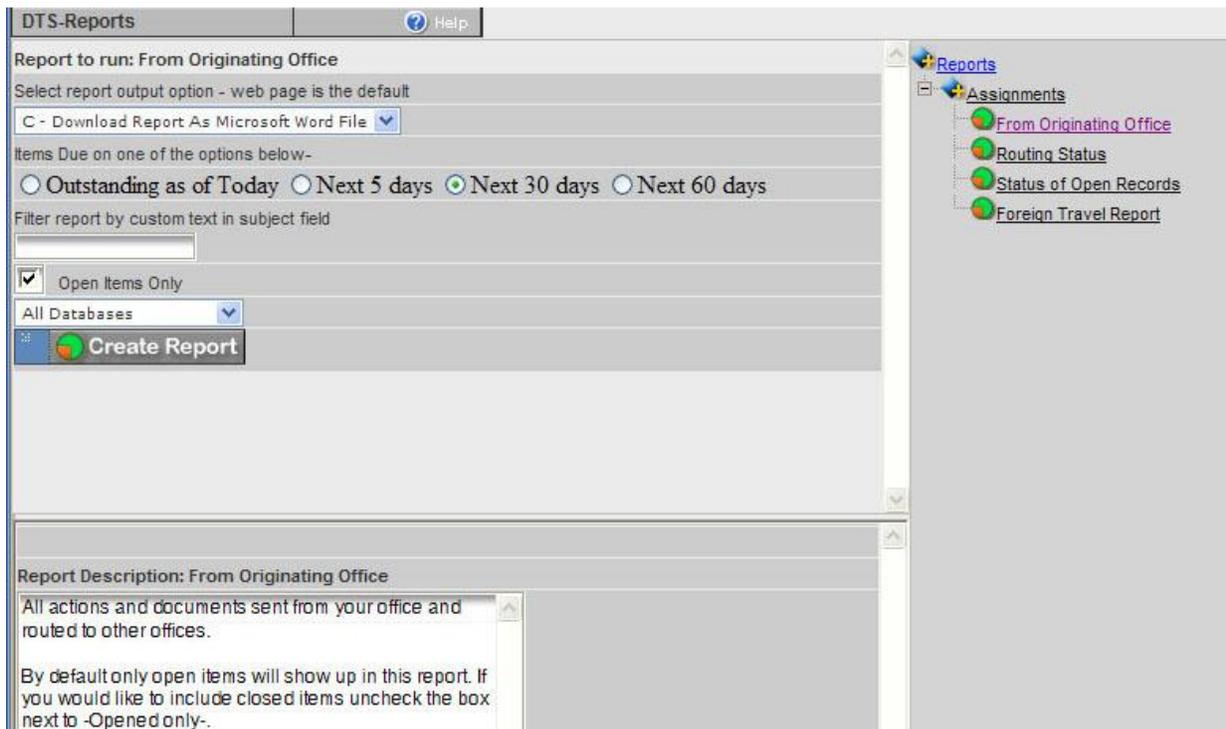
Reports

- Assignments
 - From Originating Office
 - Routing Status
 - Status of Open Records
 - Foreign Travel Report

Step (1) Click 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.

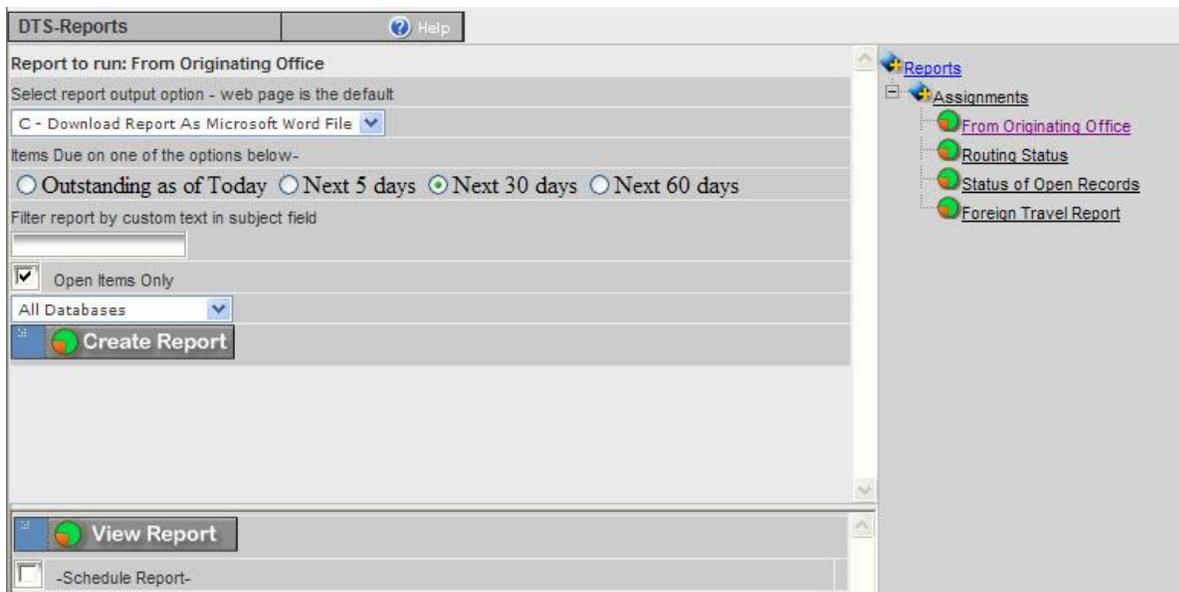
- From Originating Office
- Routing Status
- Status of Open Records
- Foreign Travel Report



Step (3) Select the report output from the dropdown.

Step (4) Choose the Items Due: Today, next 5 days, 30 days, 60 days.

Step (5) Click the Create Report button.



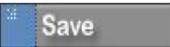
Step (6) Click the View Report button.

Custom Reports

Selection Criteria

The screenshot shows the 'DTS-Custom Reports' interface. At the top, there are tabs for 'Standard' and 'Custom'. Below the tabs, there is a 'Saved Reports' dropdown and a 'View Report' button. The main form is divided into several sections: 'Report Description', 'Document', 'Addressee', 'Routing', and 'Attachment'. The 'Report Description' section includes a 'Report Name' field and a 'Database' dropdown menu with 'DTS-TRAIN Training database' and 'USGS National Database' options. The 'Document' section contains fields for DCN, Input Date, Inc Date, Doc Type, ES No, Synopsis, Signed By, NARA Retention, and others. The 'Addressee' section includes Last Name, Organization, Addressee Office, Cong. State, Author, and Constituent. The 'Routing' section has fields for Assigned To, Task, Task Assigned Date, Task Due Date, Task Completed Date, and Assigned By. The 'Attachment' section has Keywords and Description fields. At the bottom are buttons for Add, Save, Cancel, and Delete.

Step (1) Enter a name for your report

Step (2) Enter the criteria for your report, and click the  button.

Report Format

DTS-Custom Reports Help

Saved Reports Custom Report Test View Report

Selection Criteria **Report Format** **Sort Order** **Schedule**

Report Name

Report Title
 Title that will appear at the top of the report

Available Fields

- DCN
- Input Date
- Received Date
- Orig. Office
- In/Out
- Inc. Date
- Due Date
- Action
- Doc. Type
- Sig. Level
- Ext. No
- ES No
- ES Due
- Subject
- Synopsis
- Xref
- Medium
- Mail Tracking Num
- Signed Date
- Signed By

On Report

Arrange the selected field names in the order you wish them to appear on the report.

Add Add All Remove Remove All ^ v

Add Save Cancel Delete

Step (1) Type a title for your report that will appear at the top of the report

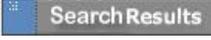
Step (2) Select the fields for your report columns. Use the up/down buttons to arrange them in the order you prefer.

Step (3) Click the Save button.

Sort Order

The screenshot shows the 'Sort Order' tab of the 'DTS-Custom Reports' application. At the top, there is a 'Saved Reports' dropdown menu set to 'Custom Report Test', a 'View Report' button with a colorful icon, and a 'SearchResults' button. Below this are four tabs: 'Selection Criteria', 'Report Format', 'Sort Order' (which is active), and 'Schedule'. The 'Report Name' field contains 'Custom Report Test'. Under the heading 'Select up to 4 fields to sort the results by', there are four rows, each with a field selector and a sort order dropdown. The first two rows are filled with 'Input Date' and 'Ascending'. The last two rows are empty. At the bottom, there are four buttons: 'Add', 'Save', 'Cancel', and 'Delete'.

Step (1) Select up to four fields to sort your report. Click the  button.

Step (2) Click the  button to generate your report in Excel, or click the  button to view the results of your report online.

Schedule

The screenshot shows the 'Schedule' tab of the 'DTS-Custom Reports' application. At the top, there is a 'Saved Reports' dropdown menu set to 'Custom Reports Test', a 'View Report' button with a colorful icon, and a 'SearchResults' button. Below this are four tabs: 'Selection Criteria', 'Report Format', 'Sort Order', and 'Schedule' (which is active). The 'Report Name' field contains 'Custom Reports Test'. Under the heading 'Select date and time to receive your report:', there is a clock icon. Below that, under the heading 'Select email recipients receive your report:', there is an envelope icon. Under the heading 'Input Email Text Below:', there is a large text area. At the bottom, there is a checkbox labeled 'Check to stop this scheduled report.' and four buttons: 'Add', 'Save', 'Cancel', and 'Delete'.

Step (1) Click the red clock to select the day(s) and time(s) to receive your report

The screenshot shows a configuration window with a table of days and start times. A pop-up menu titled "Select a Time" is open, showing a grid of times from 12:00pm to 9:45pm in 15-minute increments. The 2:00pm slot is highlighted. The window also includes a "Save" button and a "Close" button in the top right corner.

Day	Start Time
Monday	<input type="text"/>
Tuesday	<input type="text"/>
Wednesday	<input type="text"/>
Thursday	<input type="text"/>
Friday	<input type="text"/>
Saturday	<input type="text"/>
Sunday	<input type="text"/>

Times shown are for your local time zone.

Select a Time A.M. P.M. X

12:00pm	12:15pm	12:30pm	12:45pm
1:00pm	1:15pm	1:30pm	1:45pm
2:00pm	2:15pm	2:30pm	2:45pm
3:00pm	3:15pm	3:30pm	3:45pm
4:00pm	4:15pm	4:30pm	4:45pm
5:00pm	5:15pm	5:30pm	5:45pm
6:00pm	6:15pm	6:30pm	6:45pm
7:00pm	7:15pm	7:30pm	7:45pm
8:00pm	8:15pm	8:30pm	8:45pm
9:00pm	9:15pm	9:30pm	9:45pm

Save

Step (2) Click on the white envelope to select the individuals to receive your report

The screenshot shows a recipient selection window. It features a search bar with a dropdown menu set to "USGS Address Book" and a "Search" button. Below the search bar are two columns: "Name" and "Selected". Between these columns are buttons for "Add", "Add All", "Remove", and "Remove All". At the bottom, there is a "Save" button and a dropdown menu currently showing "Employee List".

USGS Address Book Last name: **Search**

Name **Selected**

Add
Add All
Remove
Remove All

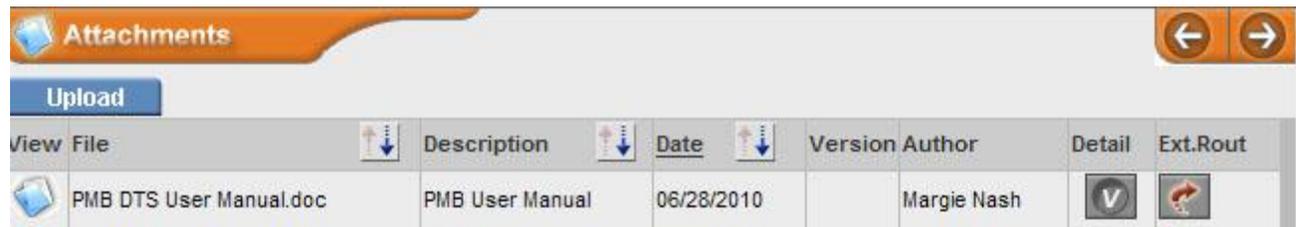
Save

Employee List
Employee List
Email Groups
DTS User List
My Office User List
Input Email

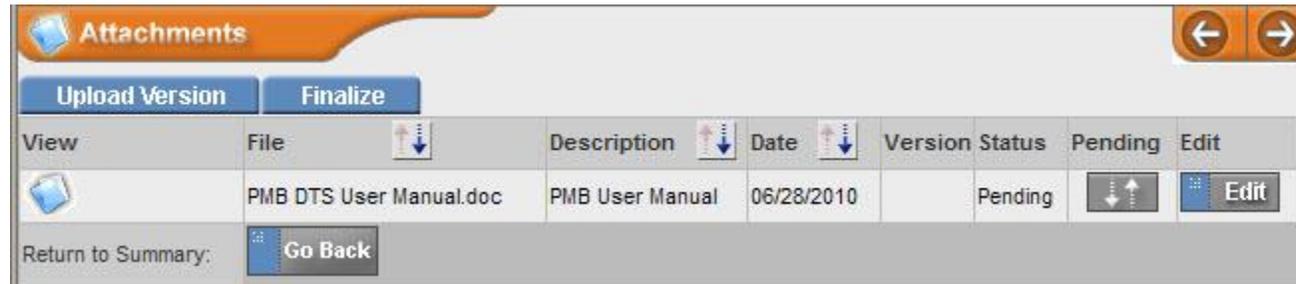
Step (3) Enter email text and click the **Save** button.

DOCUMENT VERSIONING

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



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



Step (3) Click the Upload Version tab

Version:	# 2
Author	<input type="text" value="Margie Nash"/>
Document Description	<input type="text" value="Updated PMB User Manual"/>
Keywords	<input type="text"/>
Document:	<input type="text" value="C:\Documents and Settings\user\My Documents\Cont"/> <input type="button" value="Browse..."/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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 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:

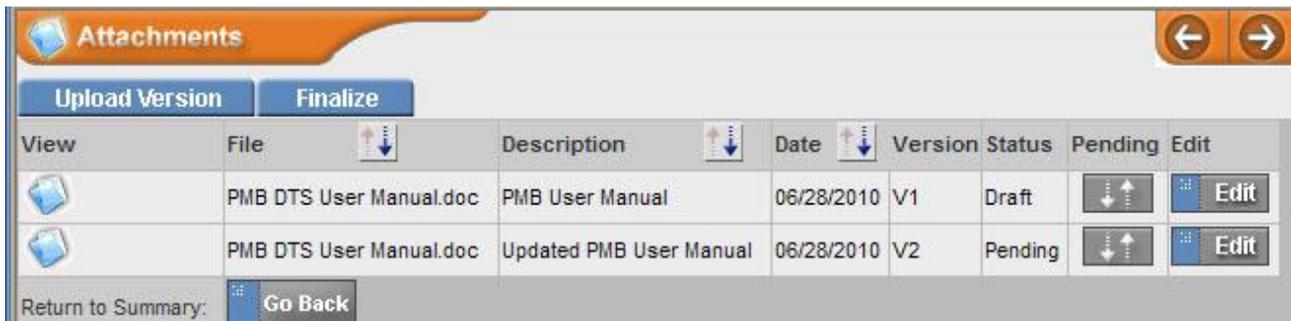
- File Name: The name of the file you uploaded
- File Size: The kilobyte size/count of the uploaded file
- Content-Type: The type of file uploaded

Step (6) Click the  button.

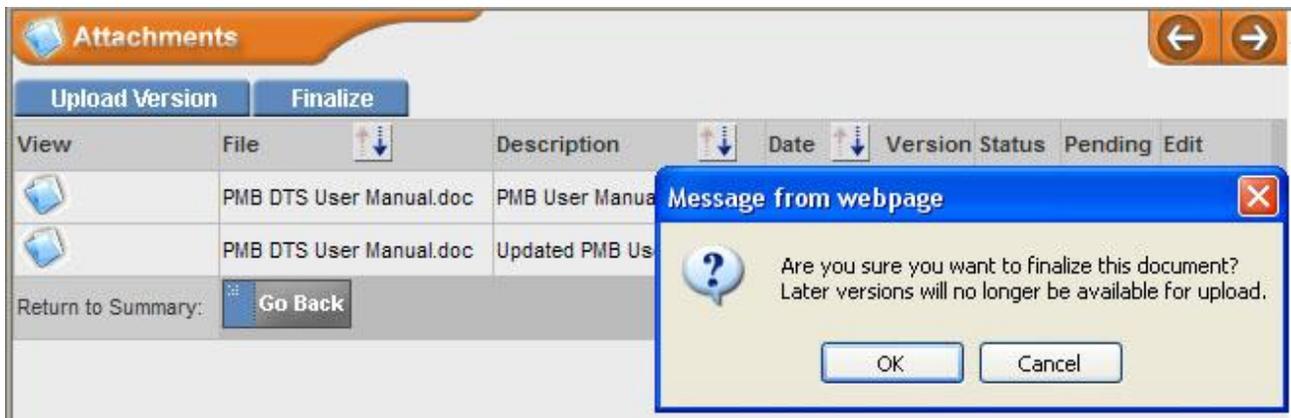


The new version automatically becomes the Pending version and shows in the Tree.

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



To make the Pending version final, click on the Finalize tab. A warning box will pop up asking if you are sure you want to finalize the document.



The pending version will change to “Published/Final” and the Upload Version tab will no longer be available.

Attachments							←	→
View	File	Description	Date	Version	Status	Edit		
	PMB DTS User Manual.doc	PMB User Manual	06/28/2010	V1	Draft	Edit		
	PMB DTS User Manual.doc	Updated PMB User Manual	06/28/2010	V2	**Published/Final**	Edit		
Return to Summary:							Go Back	

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.

Attachments	
Content Type:	application/octet-stream
Input Date:	06/28/2010 10:42:13 AM
Input by user:	Nash, Margie
File name:	<input type="text" value="PMB DTS User Manual.doc"/>
Author:	<input type="text" value="Margie Nash"/>
Description:	<input type="text" value="Updated PMB User Manual"/>
Keywords:	<input type="text"/>
Enable Electronic Signatures:	<input type="checkbox"/> Note: available only for Adobe PDF files
Final/Published:	<input type="checkbox"/>
Return to Summary:	Go Back
Save Delete	

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

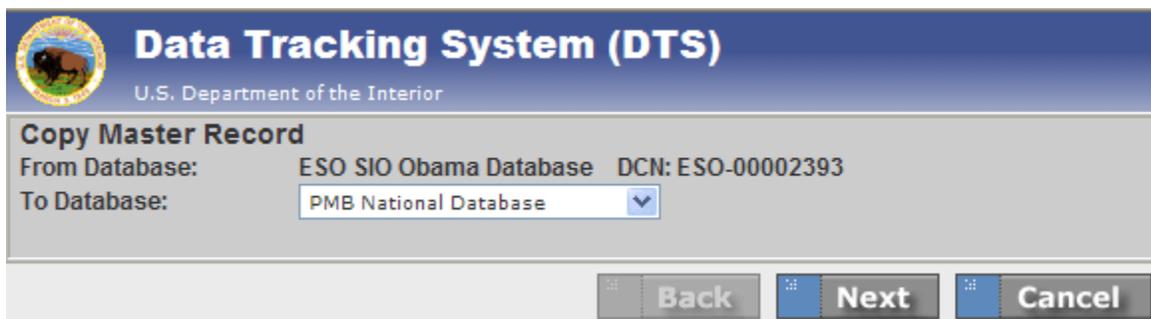
Step (4) Click the Go Back button

COPY RECORD

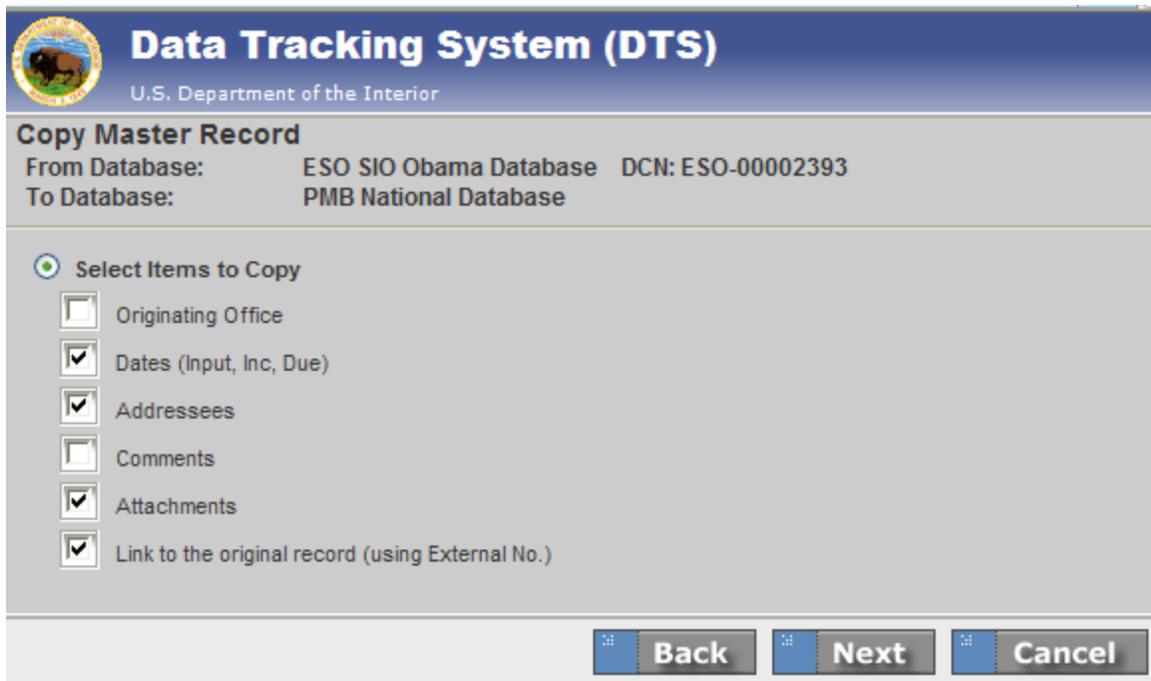
The Copy Record function allows the user to copy records from other agencies' databases into the PMB database. If you need to have this function, contact your DTS administrator.

Step (1) Click the  icon on the Navigation Bar.

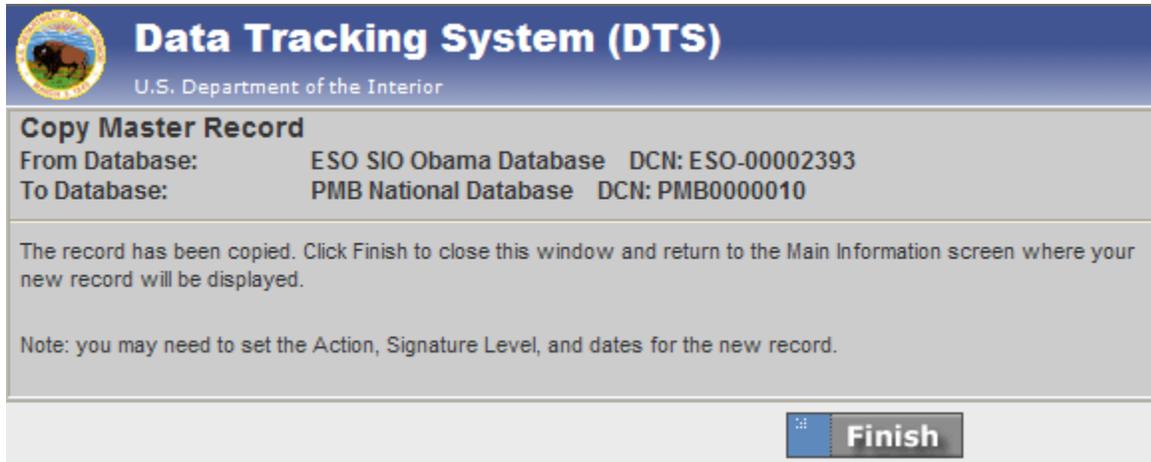
Step (2) Select the database you want to copy the record to from the dropdown. Click Next.



Step (3) Click the checkboxes of the items you want to copy. Click Next

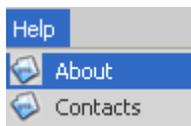


Step (4) A confirmation box will appear showing the new DCN in your database. Click Finish.



HELP

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



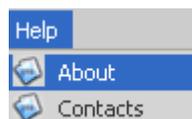
Menu Bar Help



Navigation Bar Help



Reference Help

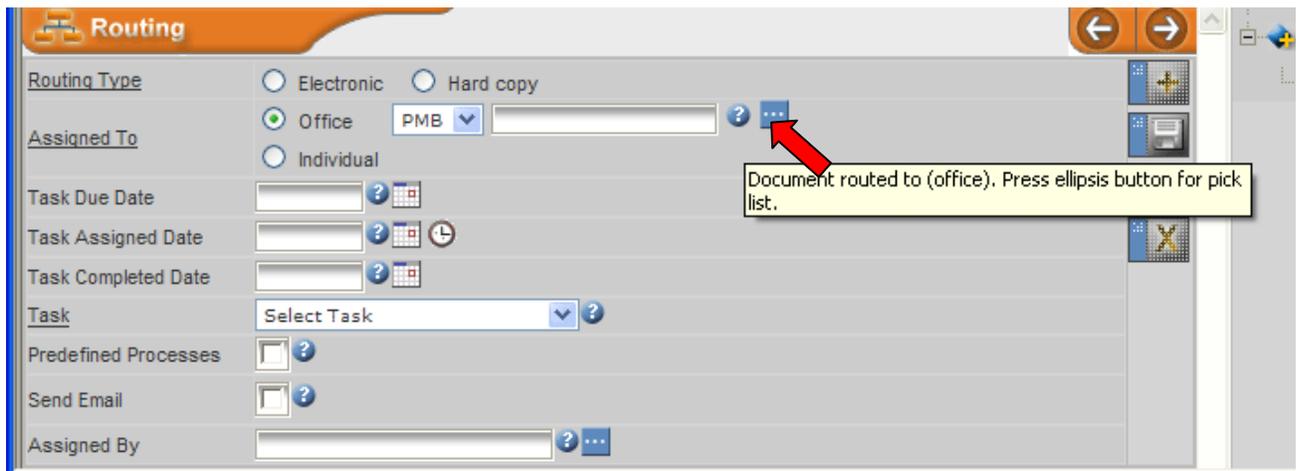


The *Menu Bar Help* shows the current version, build, and new features of the DTS, and also who to contact for user support.

The screenshot shows the top navigation bar of the DTS application. It includes a 'Data Tracking Help' menu, a 'Home' button, and several navigation icons: a left arrow, a right arrow, a refresh icon, a folder icon, a magnifying glass, and a globe icon. Below the navigation bar, the text reads 'DTS Version: 2 Build: 92'. A paragraph describes the DTS as a web-based application for storing, transmitting, and collaborating on service information. A section titled 'What's new in this release:' lists updates for 'Build 92 (09/22/2009)', including changes to task assignments, record updates, user IDs, default contacts, and overdue correspondence summaries.

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

The screenshot shows a dialog box titled 'Data Tracking System (DTS)' with the subtitle 'U.S. Geological Survey, U.S. Department of the Interior'. It features a 'Close' button in the top right corner. The main content area is titled 'DTS - User Settings' and contains the instruction 'Activate/Deactivate your user settings below:'. There are two settings listed: 'Disable Tooltip' (checked) with the note 'This change takes effect with the next record you edit.', and 'Full Screen Mode' (checked) with the note 'You must close your browser window and restart for this change to take effect.'. A 'Save' button is located at the bottom of the dialog.



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

