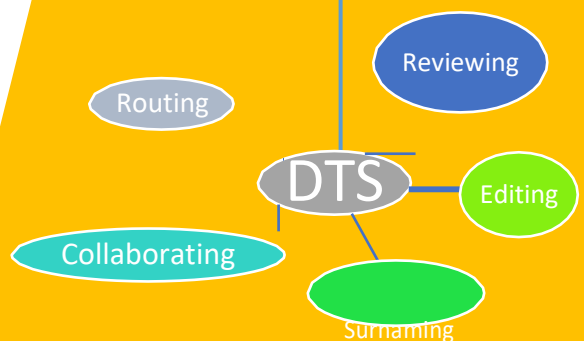




DATA TRACKING SYSTEM DTS USER MANUAL



Correspondence Control Unit

2020

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A Note from Nikki Randolph, Chief, of the U.S. Fish and Wildlife Service's (Service) CCU and DOI DTS System Manager

A Brief History of the U.S. Fish and Wildlife Service's Data Tracking System (DTS):

In 2005, a small group of administrators collaborated on how we could become more efficient in our efforts to manage correspondence, focusing on new technology to deliver finished products in a timely manner. The overdue list of correspondence to the Secretary's office was out of control. The previous system was not meeting our needs nor those of the Director. DTS was born out of these discussions.

For over a year, an awesome group of Software and Application developers worked together to create DTS, which was rolled out to the Service in 2006. In the beginning, we started with just two users from each Program. Then Regional Offices started pushing our correspondence out to the field using the system. When I took over as the DTS Manager in 2007, I knew the product we had developed would become the go-to system for managing correspondence.

Within weeks, we managed to gain control of our correspondence management. The ability to share documents with Regional Offices digitally was simply transformative. As we continued along this road, we updated the system to achieve the ability to control and move correspondence in ways more tailored to the needs of a growing user base.

In 2008, the Office of the Executive Secretariat, and the National Park Service joined the Service in using DTS, and we spent the next nine years working with the other Bureaus and SIO Programs to bring them into the fold. One by one, the other Bureaus came online, BLM, BIA, USGS, BOR, BSEE, and finally OSM joining us in 2017. Today, many of the SIO Programs are now using DTS as well as PMB, OCL, OCIO, OIA, OEIA, ALSM, FWP, OST, OIWR, REGS, and more.

Today, DTS doesn't look anything like it did in the beginning. We have over 7,000+ DTS users across the Department of the Interior. We have processed over a million plus documents since going live. Our overall turnaround on assignments has been groundbreaking and the idea of a "lost" or misplaced package has been eradicated.

When mass teleworking was pushed in March 2020, some were concerned about how to get work accomplished in a timely manner without being in the office. However, because DTS was designed for exactly this type of situation, the Service seamlessly transitioned into a digital world, and the DTS System became our Rock Star! Imagine where we would be without it – I can't.

It has been an incredible sight to see DTS and its user base grow from that original small group of us (I might be the only person left from the original team!). To watch what it has become today to what is coming tomorrow... is simply awesome. I am so grateful to everyone who has made the success of DTS possible. Thank you to the incredible team in CCU, Donnise Hancock and Jaime Saunders, and the other members of the NEAT Team who are champions of this incredible tool. This has become one of my biggest triumphs in my professional career, and I owe thanks to many of you for making this happen.

Happy DTSing!!

CHAPTER 1

CONNECTING TO DTS

Step (1) Enter the following link in your preferred browser (Chrome, IE, Firefox)
<https://dts.fws.gov>



Step (2) Press Enter.

Step (3) If you have more than one User Account, select the one you want to use and click Enter.

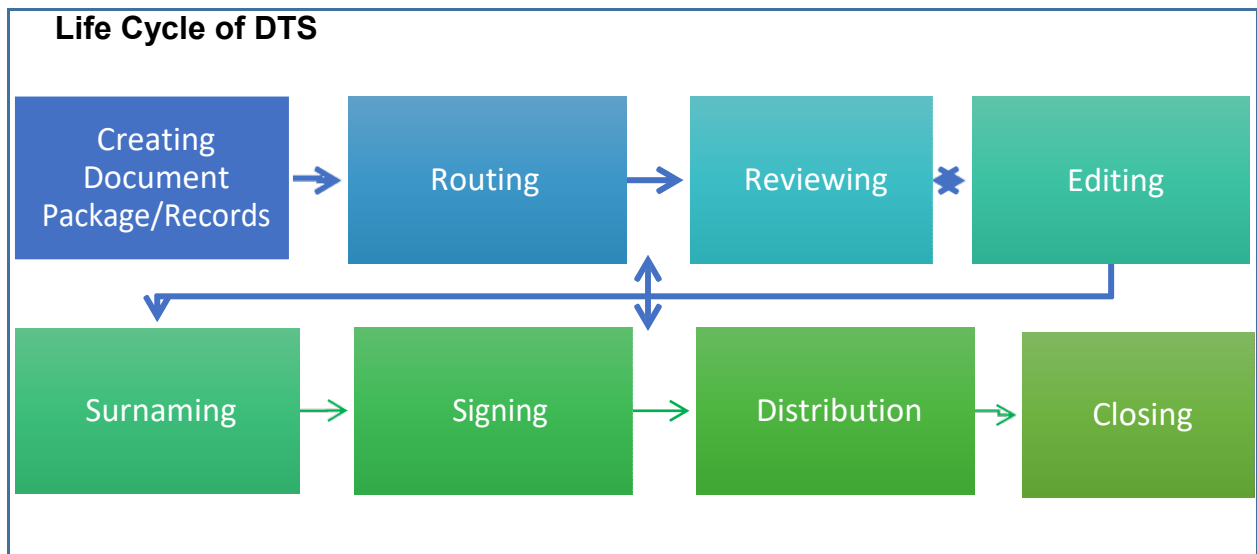
Step (4) If successful, the Control Center will load and you should see your assigned inbox. If you are having trouble logging in please contact your DTS administrator for your Agency or send an email to System Owner/Manager: nikki_randolph@fws.gov

BENEFITS OF USING DTS

Ever been overwhelmed by paperwork or frustrated with locating a specific document in a pile of paperwork? The solution is DTS.



DTS is a web-based application developed and maintained by the U.S. Fish and Wildlife Service exclusively for organizing, routing, reviewing, editing, locating, communicating, collaborating, and even signing documents online. In 2006, the Service debuted the DTS system to just a few key (15) administrative positions, and today over 4,000 employees across the Department of the Interior use this system for correspondence maintenance.



[Figure 1]

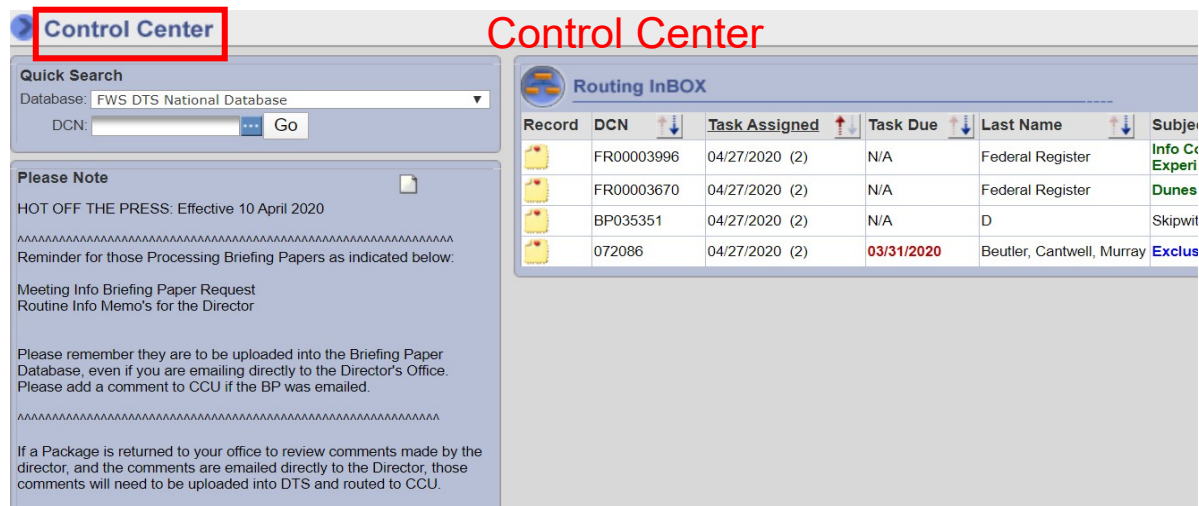
Top reasons for using DTS for all your correspondence tracking:

- Virtual storage and multi-user collaboration [Figure 1]
- A virtual review and approval of documents
- Real time online status tracking of various documents on the move

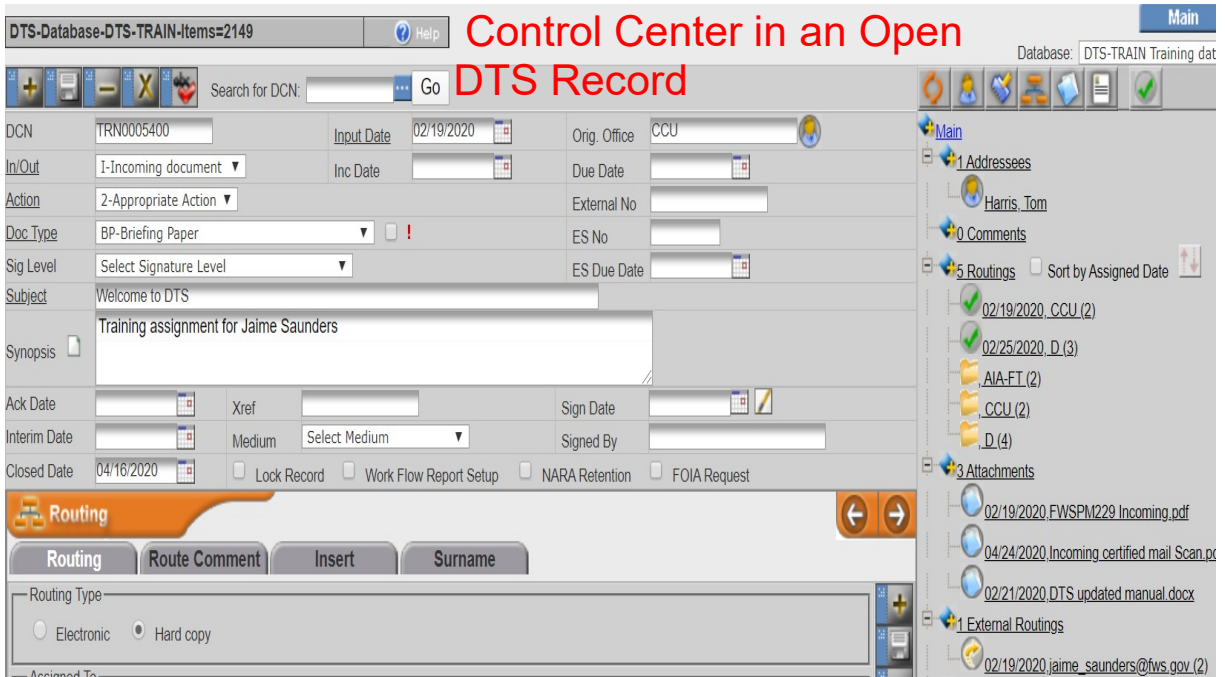
DTS is made of three main sections: Navigation Bar [Figure 2], Control Center [Figure 3], and Control Center in an open DTS record [Figure 4] as shown below.



[Figure 2]



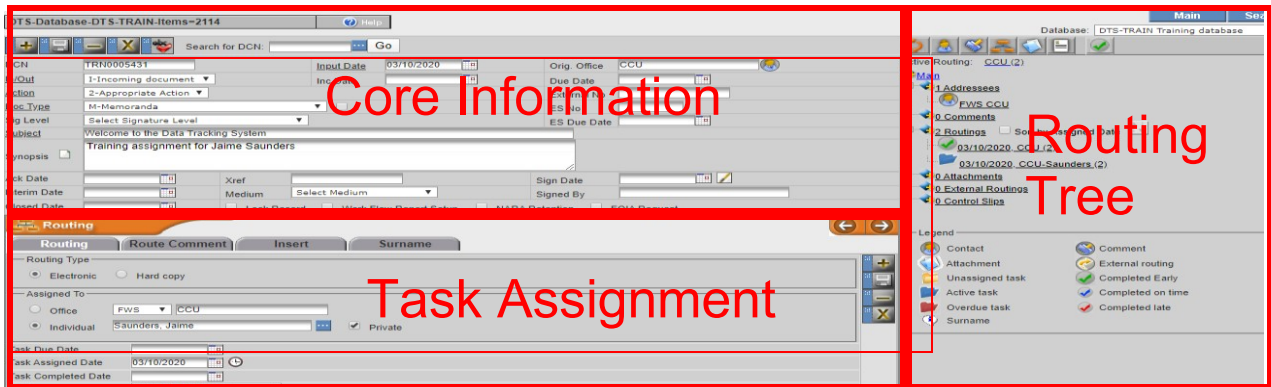
[Figure 3]



[Figure 4]

When you open up a DTS record from your inbox, the screen below will appear providing users with detailed information about the record.

The Control Center in an open record [Figure 5] is divided up into three sections: 1) Core Information, 2) Routing Tree, and 3) Task Assignments.



[Figure 5]

- 1) Core Information Screen includes the Document Control Number (DCN), originating office, due date, document type, signature level, subject, synopsis, and overall action required.

- 2) Routing Tree is a chronological view of information in the right pane. The item names are links that load the detailed information into the task headings with addressees, comments, routings, attachments, external routings, and control slips.
- 3) Task Assignment section is linked to the Routing Tree to enter and view additional information for a record regarding routings, addresses, attachments, comments, and control slips.

CHAPTER 2

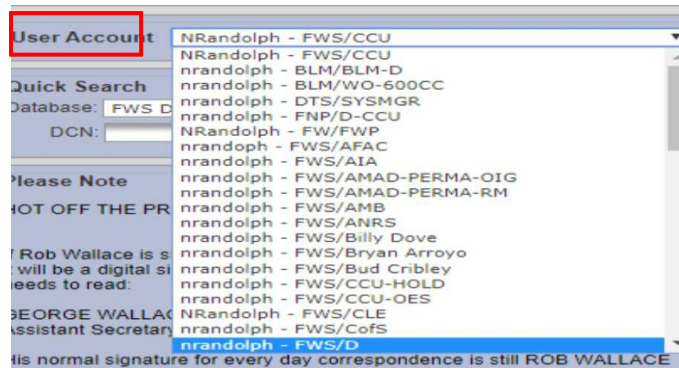
- Selecting Your User Account
- Quick Search
- Navigation Bar
- Reading your INBOX
- Please Note Section
- Outbox and Recent Tasks
- Training
- Section 508 Compliance
- Help in the Control Center

SELECTING YOUR USER ACCOUNT

DTS will automatically open up to your designated/assigned inbox. **If you have more than one Inbox,** you should click on User account to quickly switch to other accounts you may have.

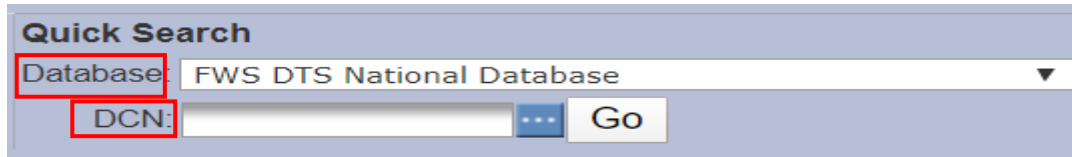
User Account: Nikki Randolph-FWS/CCU

(If you only have 1 account, you will not see USER ACCOUNT)



QUICK SEARCH

Quick Search works if you know the DTS number that you are looking for and what database it may be housed in.

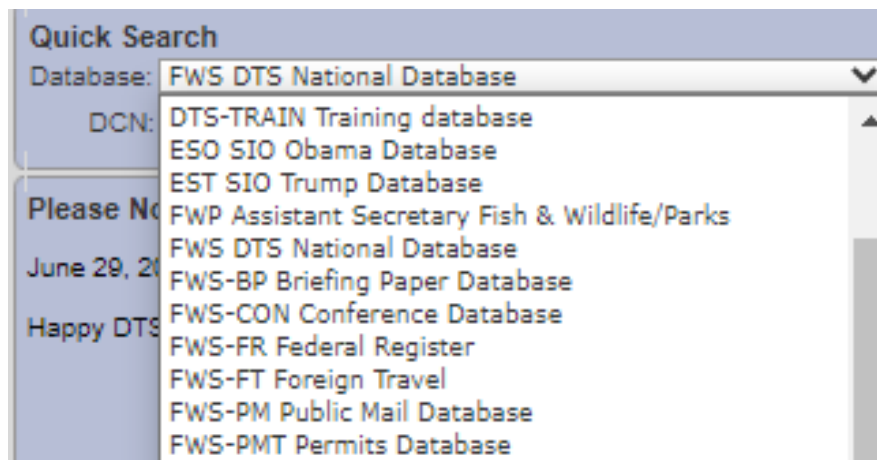


Quick Search

Database: FWS DTS National Database ▼

DCN: ... Go

DTS manages multiple databases of information. This is just a sample of the many databases that are used in this system. (Note: All DOI Bureaus have their own Database, and several use multiple databases: contact your DTS administrator for more information on the function of their databases).



Quick Search

Database: FWS DTS National Database ▼

DCN:

Please Note: The following databases are available for search:

- DTS-TRAIN Training database
- ESO SIO Obama Database
- EST SIO Trump Database
- FWP Assistant Secretary Fish & Wildlife/Parks
- FWS DTS National Database
- FWS-BP Briefing Paper Database
- FWS-CON Conference Database
- FWS-FR Federal Register
- FWS-FT Foreign Travel
- FWS-PM Public Mail Database
- FWS-PMT Permits Database

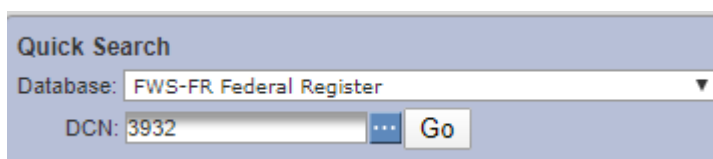
How to Use Quick Search:

Step (1) Select the correct database.

Step (2) Input the correct DCN number.

Step (3) Press Enter or click the button.

For example, if you want to search for FR3932, select FR-Federal Register in Database and enter 3932 in DCN as shown below.



Quick Search









Database: FWS-FR Federal Register ▼

DCN: 3932 ... Go

NAVIGATION BAR





Definition of symbols of the Navigation Bar mean:


	(Home) Push the Home Button any time you want to return to your home screen
	(Backward and Forward) Use the arrows to navigate back and forth between Screens
	(Refresh) Refresh your screen
	(New Record) Add a new Record
	(Search) Take the user to the Simple Search Screen
	(Predefined Process) Create/edit pre-defined routings
	(Help) Activate and deactivate your user settings for tool tips
	(Reports) Create and schedule reports




UNDERSTANDING YOUR INBOX

When successfully connected to DTS, your assigned inbox will appear. Any packages assigned for action will be found here. (If your inbox is empty, you have no active assignments assigned).

Routing InBOX						
Record	DCN	Task Assigned	Task Due	Last Name	Subject	
	TRN0005400	04/02/2020 (2)	N/A	Sawyer, Fin	Welcome to DT	
	072076	04/02/2020 (2)	03/25/2020	Cramer	Request review	



Note: *The Routing inbox defaults to packages chronologically assigned, (meaning that your most current/recently tasked assignments will be displayed first).*

If there are several assignments in your DTS inbox, you can quickly sort the records by clicking on the up/down arrows . Each Tab has the ability to sort. However, once you leave the inbox and return, DTS automatically reverts back to the original sort.

Routing InBOX						
Record	DCN	Task Assigned	Task Due	Last Name	Subject	
	TRN0005400	04/09/2020 (2)	N/A	Harris	Welcome to	
	069123	04/09/2020 (2)	N/A	Congress	Report to C	Species Ex
	BP035295	03/27/2020 (3)	N/A	ANRS	Update on	

The number indicates an assigned task. (2) refers to Appropriate Action

- RECORD is the package in a hard copy or an electronic form.

	This icon means the record should be coming to your office in hard copy package
	This icon means that the record is electronic and no hard copy is being routed to your office

- DCN (Document Control Number) is the tracking number of this package. This number will never change.
- TASK ASSIGNED shows that the date of the Record was assigned to your inbox.

Note: (2) located after the date in parenthesis is the task that's been assigned. Every Bureau has different tasks that they use, but the following tasks are available for DTS users. Other Bureaus may have different Tasks numbers. (You will find more info on this later in this guide).

- Prepare Draft Response: Someone outside of your program will sign the completed correspondence.
- Prepare Reply: Once correspondence clears your program/region will sign the completed correspondence.
- Appropriate Action: Your program decides what the appropriate action is.
- Hard Copy Surname- This is an assignment for packages that are being routed in hard copy (a physical package).

Note: *as of March 15, 2020, the Service has moved away from hard copy packages and all actions from beginning to end are being completed electronically through the DTS system.*

- (4) Signature- DTS document is ready for signature.
- (5) Review/Comment- A review or comments are requested.
- (6) Revise- Edits, comments are to be addressed.
- (8) See Comments- Comments entered in the DTS for review.
- (9) Mail/Distribute- Correspondence is ready to distribute or mail out.
- (14) File-The correspondence has been distributed and now ready to be filed.
- (15) For Your Information- FYI!
- (16) Surname through DTS- Electronic Surname requested.

- **TASK DUE:** It is the date by which the assignment should be completed.
- **LAST NAME:** It is also called Addressee. The addressee should be the name of who the correspondence is addressed to.
- **SUBJECT:** It describes what the purpose of the record is.

Note: *The USFWS color codes certain records in DTS.
Congressional Records are blue. (This function is available DOI WIDE!)
Foreign Travel is Orange.
Federal Registers are Green.
This helps those offices that have heavy DTS traffic to quickly identify these records quickly.*

PLEASE NOTE SECTION

Important information from your Administrators in DTS will be posted in this section. This is used to update users on what is new in DTS; Best Practice, Change of signatories, and other relevant information for DTS Users.

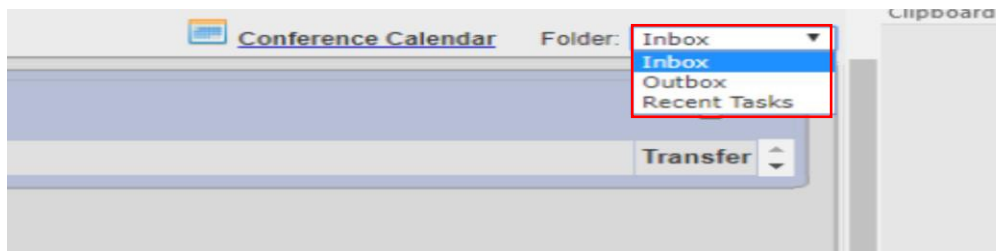
Please Note

HOT OFF THE PRESS: Effective March 31, 2020

If Rob Wallace is signing your Federal Register it will be a digital signature and his signature block needs to read:

OUTBOX AND RECENT TASKS

In the area of the Control Center, you may or may not see “Conference Calendar”. (This is inherently FWS use only.) But next to calendar (if you have it) are two additional inboxes: Outbox and Recent Tasks. The Outbox will list everything that the current office has created and assigned out in DTS.



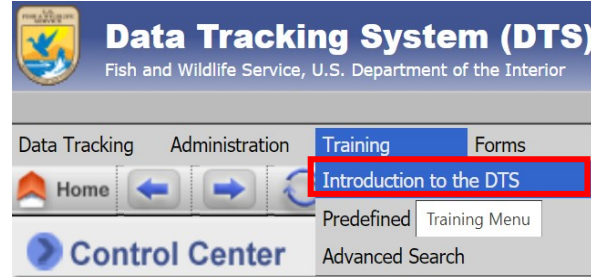
The Recent Task inbox will list everything you recently worked on and it comes in handy when you need to find a record you worked on really quick and can't remember the number.

TRAINING

There is an interactive online training module that you can utilize for quick training.

Step (1) Click on the Training button as shown below.

Step (2) There are three options under Training menu. Select the first option, "Introduction to the DTS" option and just follow the prompts.



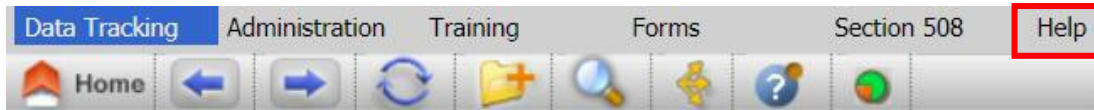
SECTION 508 COMPLIANCE

Information Pages with links for training in how to convert documents for the hearing and seeing impaired.

A screenshot of the Section508.gov website. The header includes the GSA logo and the text "Section508.gov GSA Government-wide IT Accessibility Program". A search bar is located in the top right corner. Below the header is a navigation bar with tabs for "Create", "Test", "Manage", "Buy", "Sell", "Training", and "Blog". The "Training" tab is selected. Below the navigation bar is a breadcrumb trail: "Home > Create Accessible Digital Products > Create Accessible Documents". The main content area is titled "Create Accessible Documents" and includes a sub-header "Microsoft Word" with a link to "Revised 508 Standards". Under "Training Videos", there are links to "How to Make an Accessible Document in Microsoft Word", "DRAFT Microsoft Word 2016 Basic Authoring and Testing Guide" (MS Word, March 2019), "Microsoft Word 2016 Printable Accessible Testing" (MS Word, June 2019), "Baseline Test Process" (MS Word, September 2017), "Basic Authoring and Testing Guide" (MS Word, September 2017), "Detailed Checklist" (MS Word, September 2017), and "Printable Checklist" (MS Word, September 2017). Under "Microsoft Word 2010", there are links to "Basic Authoring and Testing Guide" (MS Word, January 2015), "Basic Authoring and Testing Checklist" (MS Word, January 2015), and "Baseline Tests for Accessible Electronic Documents" (MS Word, January 2015). The page ends with another "Training Videos" section.

HELP IN THE CONTROL CENTER

This Help button below will display information of the upcoming changes in DTS and also give you a list of DTS administrators' contact information for Bureaus and Offices.



DTS
Version: 2 Build: 204

The Data Tracking System (DTS) is a web-based application designed to provide the user base with a centralized, secure, and efficient way to manage and track data.

What's new in this release:

Build 204 (10/01/2019)	<ul style="list-style-type: none"> DTS00205 - Updating Control Sheets for All Bureaus/Programs.
Build 203 (04/03/2019)	<ul style="list-style-type: none"> DTS00200 - Remove user and group assignments from inactive user records. Correct issue with help page for Predefined Processes in Google Chrome.
Build 202 (03/26/2019)	<ul style="list-style-type: none"> Updated DTS contact information. Technology updates for security and compliance.
Build 201 (01/31/2019)	<ul style="list-style-type: none"> Limit the number of Addressees shown on the InBox page.
Build 200 (12/12/2018)	<ul style="list-style-type: none"> Add link to return to copied record when displaying the record copied from. SIO: Updated Transmittal Sheets.

DTS Contact Information

Password and Login Issues

DTS authenticates users through the DOI Active Directory Service. If you have problems with your password, please contact your agency's DTS Administrator.

New Offices and User Accounts


Contact your agency's DTS Administrator to add new users or offices to the DTS, for assistance with problems, or for general information.

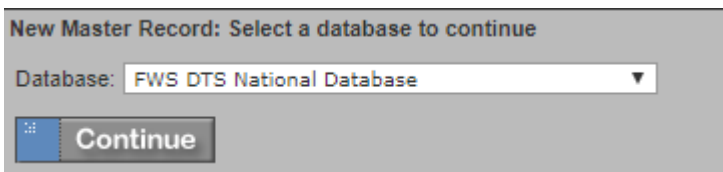
<u>Agency</u>	<u>Contact Name</u>	<u>Phone</u>	<u>Email</u>
U.S. Fish and Wildlife Service	Nikki Randolph	202-208-7535	nikki_randolph@fws.gov
Assistant Secretary for Fish and Wildlife and Parks	Nikki Randolph	202-208-7535	nikki_randolph@fws.gov
Asst. Sec. for Indian Affairs	Stephanie Cloud	202-513-0827	stephanie.cloud@bia.gov
Asst. Sec. for Land and Minerals	Pam Royal	202-208-3113	pamela_royal@ios.doi.gov
	Amanda Long	202-208-2197	adlong@blm.gov
Asst. Sec. for Policy Management and Budget	Kashieka Minor	202-208-3697	Kashieka_Minor@ios.doi.gov
Bureau of Land Management	Louis Brueggeman		lbruegge@blm.gov
	Michael Reiland		mreiland@blm.gov
Bureau of Ocean Energy Management	Ericka Williams	202-208-5669	ericka.williams@boem.gov
	Rosalind Barr	202-208-5669	rosalind.barr@boem.gov

CHAPTER 3

- Adding a New Record
- Adding a New Addressee
- Selecting an Addressee
- Selecting an Office
- Adding Comments
- Help in an Open Record

ADDING A NEW RECORD

Step (1) Click the Add New Record button  on the Navigation Bar.



New Master Record: Select a database to continue

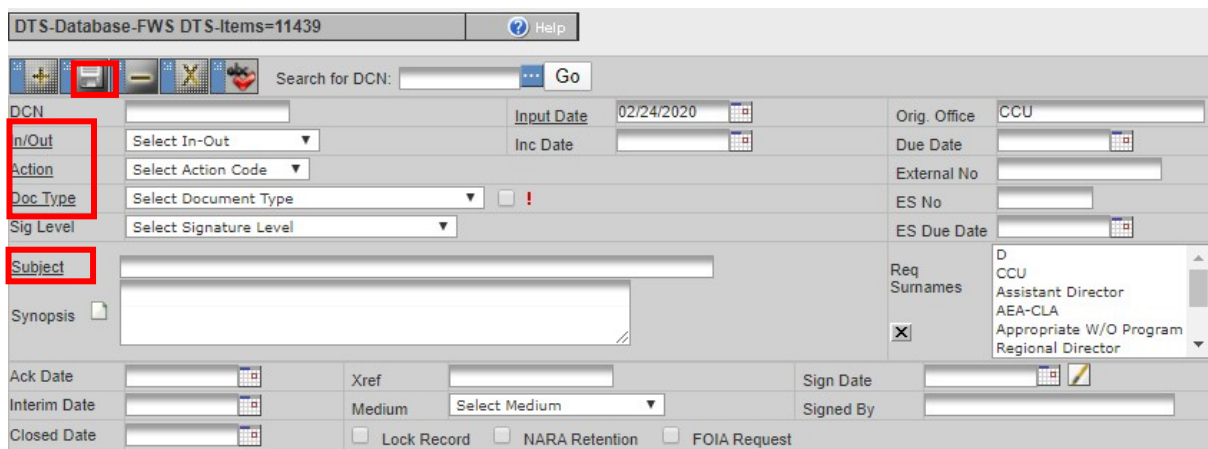
Database: FWS DTS National Database

Continue

Step (2) Select the appropriate database from the drop-down menu.

Step (3) Click the Continue button . The following screen will display. Fill in the required field.

*** You must enter data in any field that is underlined before you can go to the next step***



DTS-Database-FWS DTS-Items=11439

Search for DCN: [] Go

DCN [] Input Date 02/24/2020 Orig. Office CCU

In/Out Select In-Out Inc Date [] Due Date []

Action Select Action Code External No []

Doc Type Select Document Type ES No []

Sig Level Select Signature Level ES Due Date []

Subject [] Req Surnames: CCU, Assistant Director, AEA-CLA, Appropriate W/O Program, Regional Director

Synopsis []

Ack Date [] Xref [] Sign Date []

Interim Date [] Medium Select Medium Signed By []

Closed Date [] Lock Record NARA Retention FOIA Request

Step (4) Click the Save button  to save your record.

Note: *Once you hit Save a new field will open up.*

ADDING A NEW ADDRESSEE

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

Incoming document – Refers to documents incoming to the Service requiring a response.

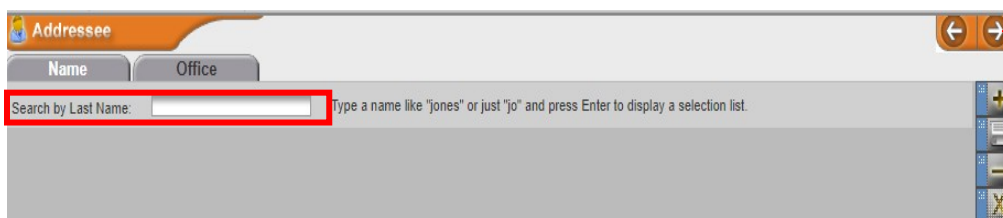
Outgoing document – Refers to documents that are being sent out from the Service that isn't dictated by an incoming response.

Use office acronyms rather than names for documents to/from offices within the Service and the Department; e.g., for memorandum addressed to the Regional Director, Interior Region 03, use "IR03" as the addressee.


The Following are a few samples of how to address certain documents that don't actually have an addressee:

Service Directorate (memos to distribute to the Service)
Federal Register
Clearance Record
News Release

After creating a new record, the following screen will pop up to add an addressee.



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

Step (1) If your lookup from Step (1) above does not produce the correct name, click the  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) Once you fill in Salutation, First Name, and Last Name, click Save button



to save the new addressee.


SELECTING AN ADDRESSEE

Step (1) After entering the core information for your record, scroll down to the Addressee screen. Enter the **last name of the addressee** in the Search by Last Name field and click **Enter** on your keyboard. 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.

Step (2) If the correct name is not listed, click the Add a new addressee button .

Step (3) Click the Save Addressee button  (right side of addressee screen) to save the addressee.

SELECTING AN OFFICE

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

If the office is outside of the FWS, click the dropdown arrow to select the appropriate Departmental bureau. (Most documents that require Department Review has to be routed by CCU).



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

Note: To add an office, call the Correspondence Control Unit at 202-208-7535.

ADDING COMMENTS

There are two types of comments to use in a Record: Comments for an entire record and comments specific to a routing office.


COMMENTS FOR AN ENTIRE RECORD

Step (1) Click comments heading [Comments](#) or comment button  as shown below.



Step (2) The following image will be displayed. A Comment Date and Comment By will be entered automatically. Enter your comments in the box.

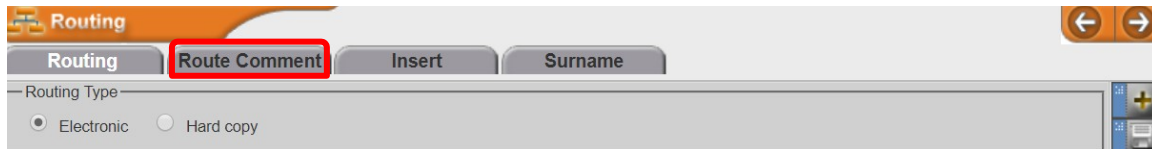


Step (3) Click save button  to save the record.

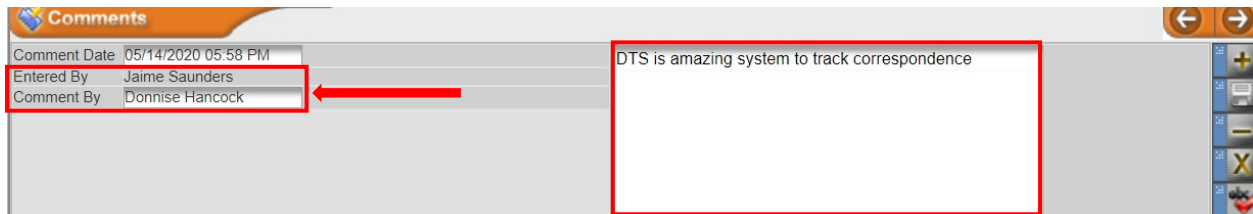
COMMENTS SPECIFIC TO A ROUTING OFFICE


Step (1) Click on the routing office for which the comment is for.

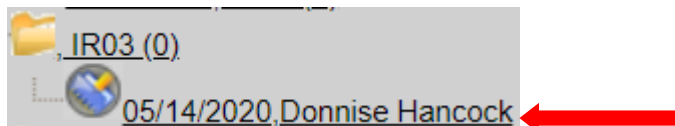
Step (2) Click on the  tab in the Routing screen.



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 the comment in the Comment box. *Entered By* is automatically entered by DTS upon saving. (If you are entering comments for your supervisor, you should remove your name and add their name in the field of *Comment By*).

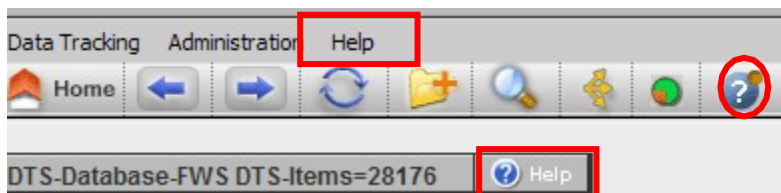



Step (4) Click the Save Comment button . Your name will populate with the routing and whoever will read the comment should click on your name.




HELP IN AN OPEN RECORD

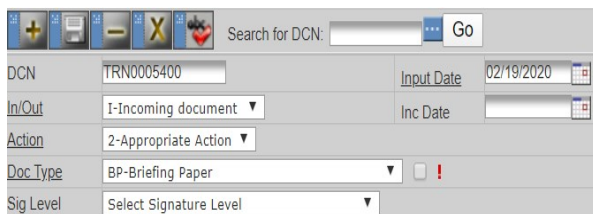
When you are in an actual DTS record and you need help, there are three types of Help as shown below.



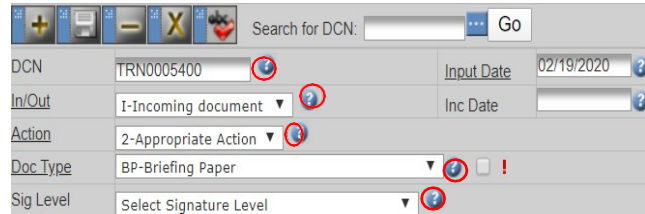
-  Navigation Bar Help, allowing users to turn on/off tool

DTS - User Settings	
Activate/Deactivate your user settings below:	
<input checked="" type="checkbox"/> Hide Tooltips	Uncheck the box to show help text icons on data fields.
<input type="checkbox"/> Full Screen Mode	You must close your browser window and restart for this change to take effect.
<input type="button" value="Save"/>	<input type="button" value="Close"/>


Note: When a cursor is positioned over Tooltip , the related information will appear to help users better understand each element.

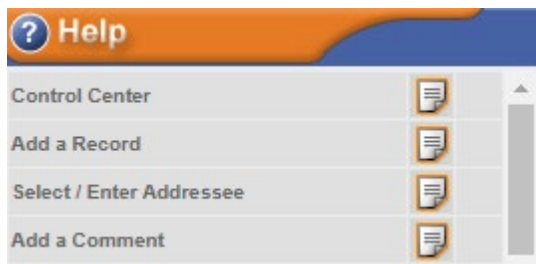


Tooltips hidden



Tooltips displayed

- Quick Reference Online Guide, enabling the manual to pop up that gives you step by step instructions in how to use DTS at your fingertips



CHAPTER 4

- Reading Your Routing Tree
- Active Routing
- Adding a Route
- External Routing
- Expediting Routings With Predefine Process
- Electronic Surnaming

UNDERSTANDING THE ROUTING TREE

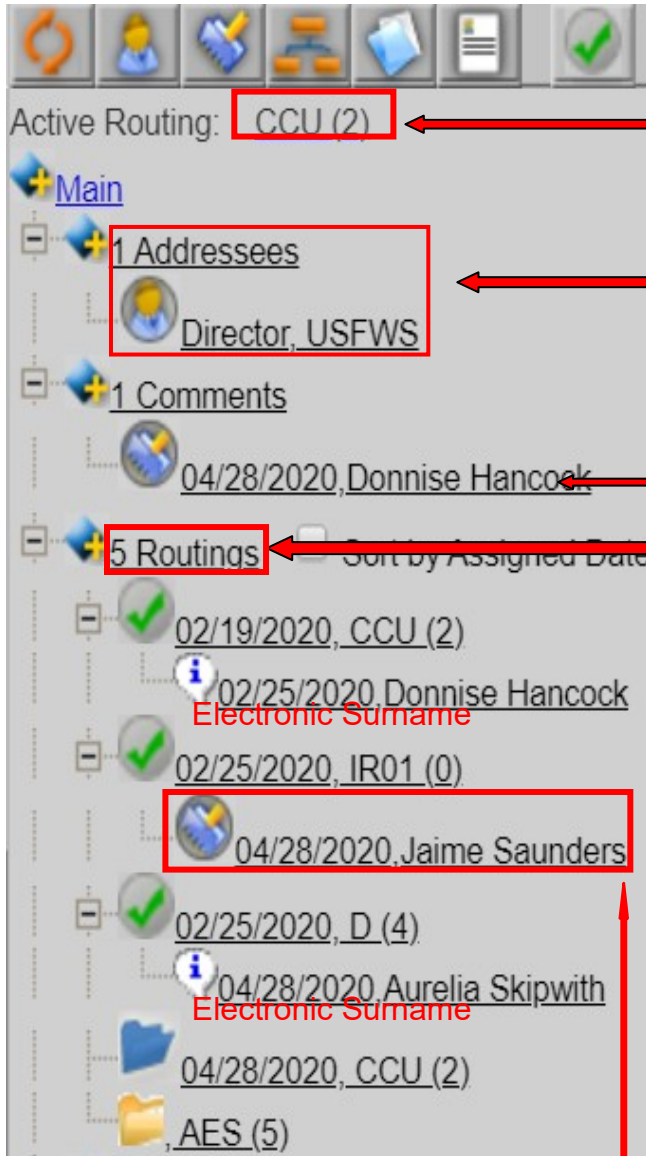
The Routing Tree view is the life of the Record from beginning to wherever you are in the process. This is where comments to the routings, surnames and tasks can be found.

Note: *The First routing is always the Originating office.*

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



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






This tells you what's the most current active routing

The Addressees should be the name of the person or organization that the finalized or signed correspondence is going to

Comments for the entire record

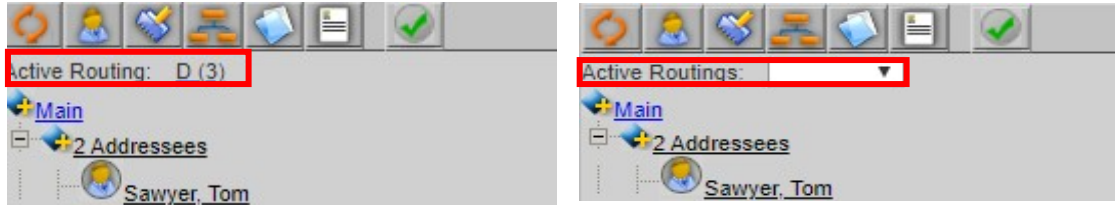
There are 5 routings existing for this example record. The originating office routing is always first.

-  Once a routing has been created, a yellow folder will appear
-  Once a record has been assigned with a specific date, a folder icon will be turned blue
-  Once an assignment has been completed with a completed date, a blue folder icon will be turned to a green checked mark

Comments specific to the Routing


ACTIVE ROUTING

This example is a quick view of open routing(s) and the assigned task (e.g., D (3) = assigned to Director for surname). If there is more than one open routing, there will be a dropdown box. Clicking on the active routing will open that routing in the Routing Screen. You can also just scroll down to your routing in the tree and click there to open.




ADDING A ROUTING

When you create a new record in DTS, the first routing will always be the originating office.


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

Step (2) Input the following information:

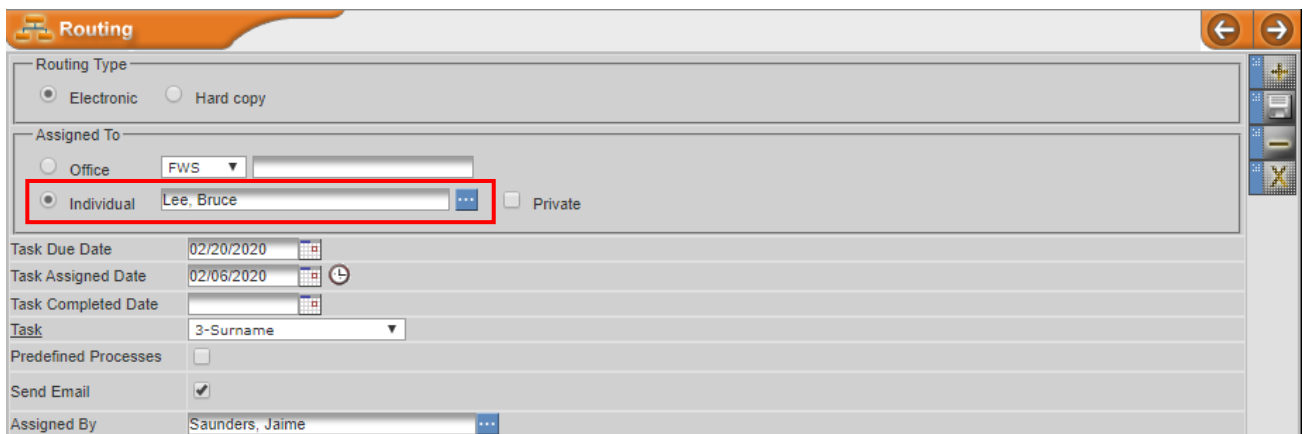
- **Routing Type (required field)**: Select Electronic or Hard Copy.
- **Assigned To** (required field): Type the first few letters of the office acronym and click the Ellipsis button  to select office.
- **Task Due Date**: Enter due date for Assigned To office.
- **Task Assigned Date**: Enter date only when document is ready to be routed to the next office in the Routing Tree.

- **Task Completed Date:** The tasked office enters completed date when action is completed and routes to the next office that is in the routing.
- **Task** (required field): Select appropriate task from dropdown list.
- **Send Email:** Always click the send email box when routing to the next office thereby notifying users they have a DTS assignment.
- **Assigned By:** This field is populated automatically.

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

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


ROUTING TO AN INDIVIDUAL



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


- Routing Type:** Electronic (selected), Hard copy
- Assigned To:** Individual (selected), Office: FWS, Individual: Lee, Bruce (highlighted with a red box), Private:
- Task Due Date:** 02/20/2020
- Task Assigned Date:** 02/06/2020
- Task Completed Date:** (empty)
- Task:** 3-Surname
- Predefined Processes:**
- Send Email:**
- Assigned By:** Saunders, Jaime

Step (1) Click the Routing button 

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

Step (3) Check the Private box if you only wish for an email to be sent to that individual.

Note: A private routing does not keep the DTS record from being seen by others who have access to that inbox. This is a rarely used tool.

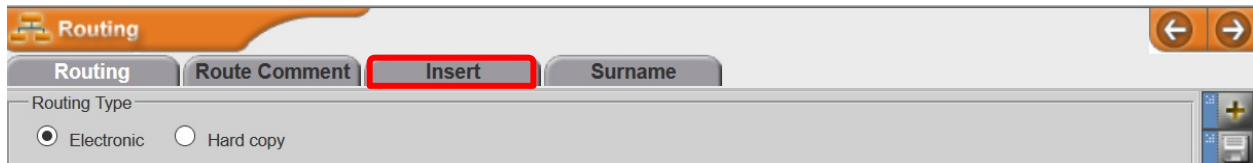
Step (4) Fill in the remaining fields and click the Save Routing button  on the right side of the Routing Screen to save the routing.

INSERTING A ROUTING BETWEEN TWO EXISTING ROUTINGS

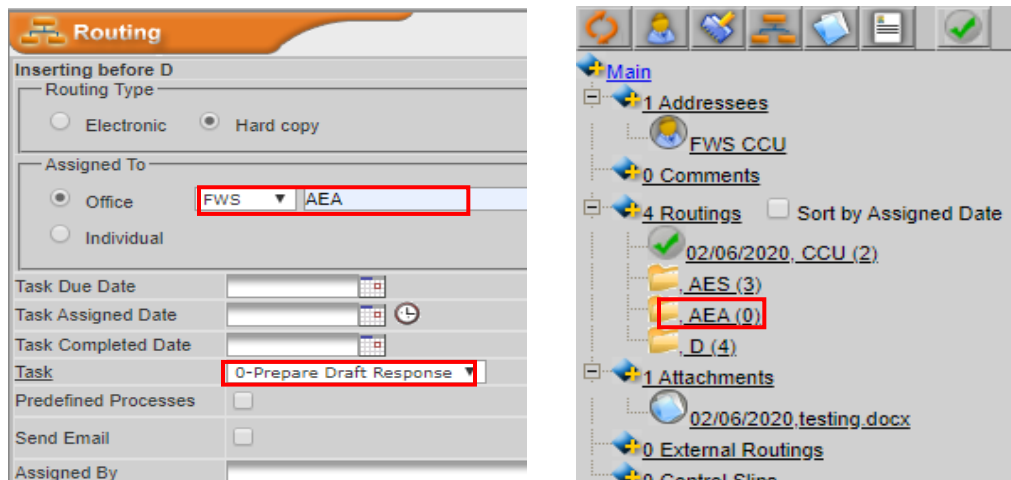
If you need to insert a routing between two routings in your routing list:

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 **Insert** tab as shown below.



Step (3) Fill out the required Information and then click the Save Routing button on the right side of Routing screen to save your inserted routing.




The Routing Tree will automatically refresh displaying your inserted routing.

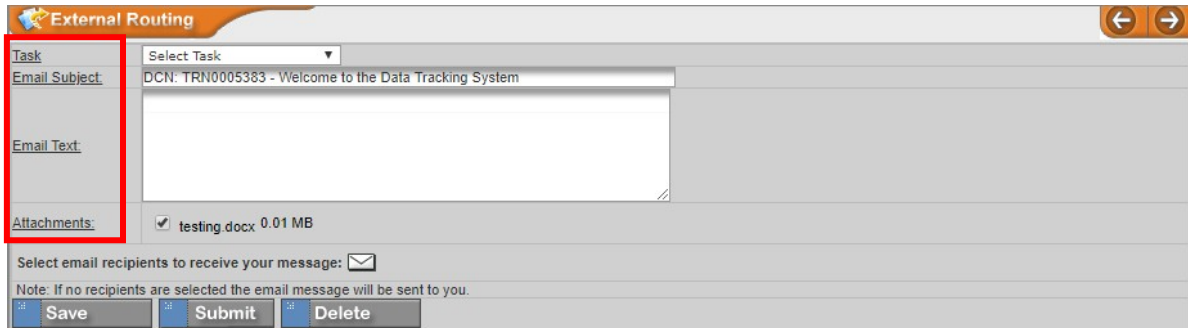
EXTERNAL ROUTING

An external routing is used to send a document to someone quickly and sending to individuals, groups, and other agencies who do not have DTS access. External routing can be achieved by the following three ways using (1) address books (2) emails that are not included in any address books (3) email groups.

USING AN ADDRESS BOOK


Step (1) Open up the Attachments Screen.

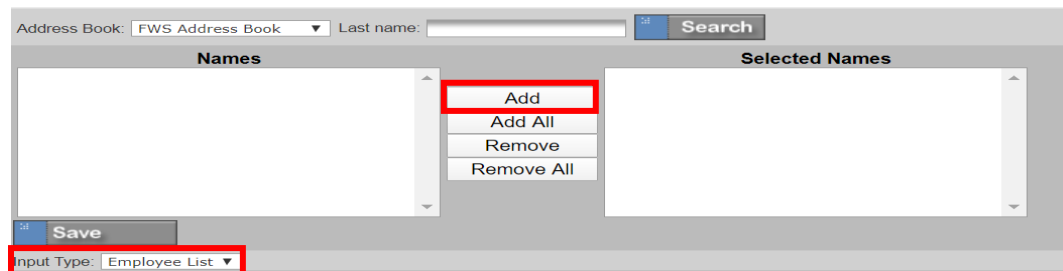
Step (2) Click on the External Routing  button to the right of the document you wish to send.



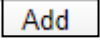
Step (3) Select the task from the dropdown menu and enter the text to be sent with the email.


- **Task (required field):** Select appropriate task from dropdown list.
- **Email Subject (required field):** Type key words what an email is about.
- **Email Text (required field):** Type a context for the entire email.
- **Attachments (required field):** select to add all attachments.

Step (4) Click the envelope  to select recipients and select Employee List which will load employee email address from an Address Book you select (Your organization's address book is set as default).



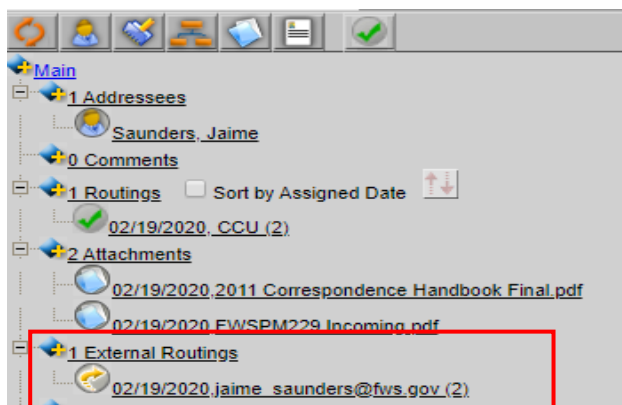
Step (5) Once an address book is selected, enter a last name of individual you want to send an email to and click Search.

Step (6) Select a right name under Names and click  Add button which will take you to Selected Names. (Repeat steps to add multiple addressees)

Step (7) Once addressees are selected, click  and close the pop up window.

Step (8) Click the  button.


Step (9) Confirmation of the email sent will pop in the Routing Tree below the Attachments listed.



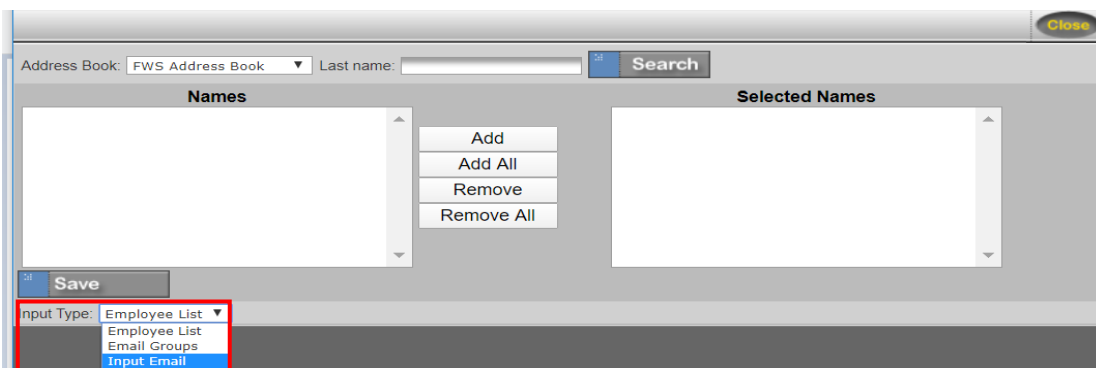
USING AN EXTERNAL EMAIL ADDRESS

If you want to send an individual an email that is not located in any address book:

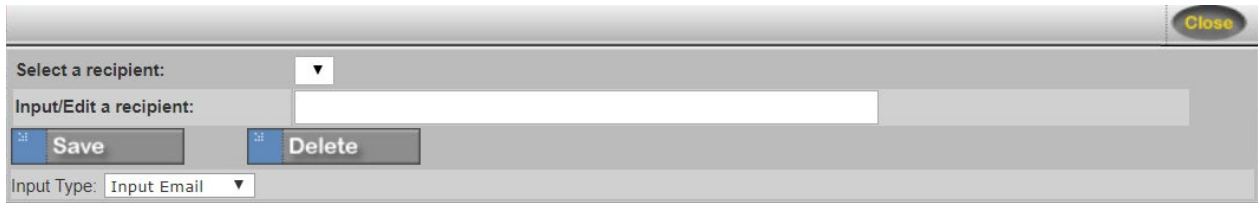
Step (1) Repeat the steps (1) through (3) of the external routing using address books.

Step (2) Click the envelope 

Step (3) select **Input Email** from the drop down menu of Input Type as shown below.



Step (4) The following screen will display. Enter an email addresses under Input/Edit a recipient and Click the save button.

A screenshot of a web interface for adding a recipient. At the top right is a 'Close' button. Below it is a 'Select a recipient:' dropdown menu. Underneath is an 'Input/Edit a recipient:' text input field. Below the input field are two buttons: 'Save' and 'Delete'. At the bottom left is an 'Input Type:' dropdown menu currently set to 'Input Email'.


Step (5) Once you click the save button, the email you just entered will disappear. Click the **Close** button.

Step (6) Click the **Submit** button.

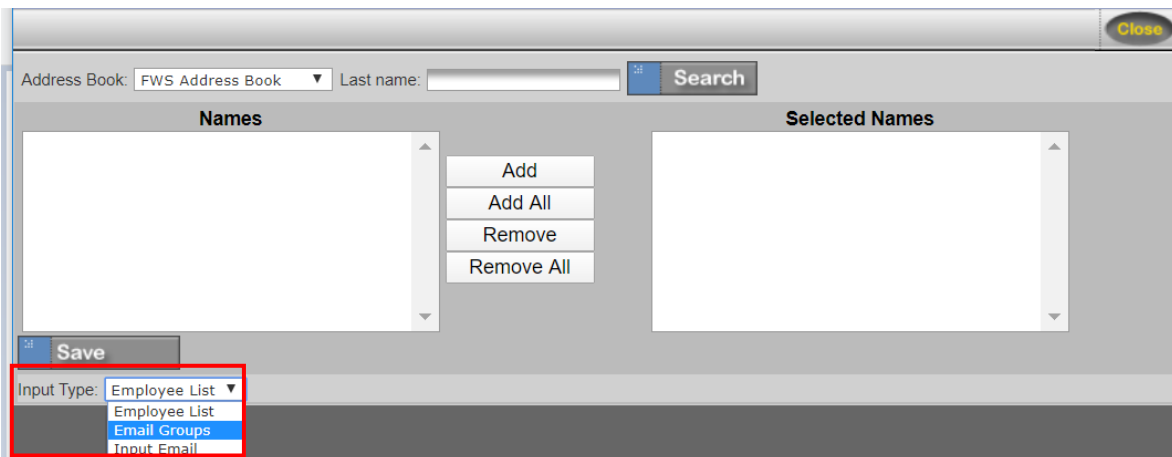
Step (7) Confirmation of the email sent will pop in the Routing Tree after the Attachments listed.

USING EMAIL GROUPS

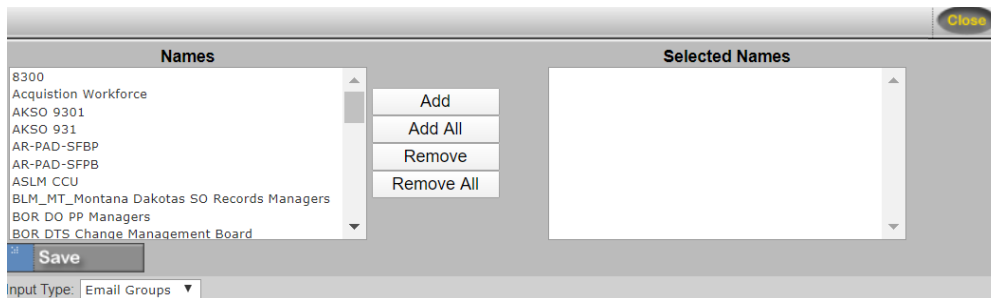
Step (1) Repeat the steps (1) through (3) of the external routing using address books.

Step (2) Click the envelope 

Step (3) select Email Groups from the drop down menu of input Type as shown below.

A screenshot of a web interface for selecting email groups. At the top right is a 'Close' button. Below it is an 'Address Book:' dropdown menu set to 'FWS Address Book' and a 'Last name:' text input field with a 'Search' button. The main area is split into two columns: 'Names' on the left and 'Selected Names' on the right. Between these columns are four buttons: 'Add', 'Add All', 'Remove', and 'Remove All'. Below the 'Names' column is a 'Save' button. At the bottom left is an 'Input Type:' dropdown menu with a red box around it, showing a list of options: 'Employee List', 'Employee List', 'Email Groups', and 'Input Email'. The 'Email Groups' option is highlighted.

Step (4) The following screen will display. Select an email group you want and press the Add button.



Step (5) Click the save button and the  button.

Step (6) Click the  button.

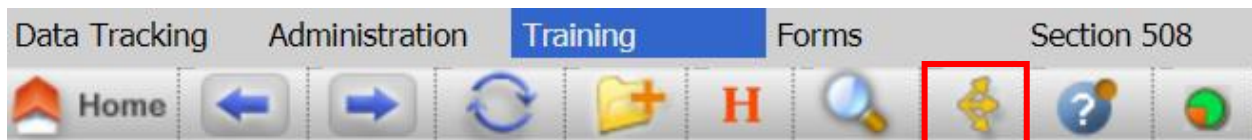
Step (7) Confirmation of the email sent will pop in the Routing Tree after the Attachments listed.

EXPEDITING ROUTINGS WITH A PREDEFINED PROCESS

(A predefined routing is a group of routings for documents that follow the same surname process and enables the DTS user to add all routings at once instead of adding them one by one, the FWS has over 1,500 predefined processes that are in use at any given time).

CREATING A NEW PREDEFINED PROCESS

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



Step (2) Type a Description (required) of your process in the Description field as shown below.

Step (3) *Optional*, click Private Process checkbox for your use only, if desired. If not checked, everyone can use the predefined routings.

Step (4) Click the **Save** button.

Step (5) Click on the Routings tab.

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

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

Step (8) Click the **Add** button to **add routings** to your predefined process.

Step (9) Repeat steps 6 through 8 for each routing in your process.

Step (10) Press **Sequence** to ensure your routings are in the desired order by moving up or down a routing office as shown below.

DTS-Predefined Process-000001657			Help
Process Name	Routings	Sequence	
Assigned To	Action	Move Up/Down	
CCU	2-Appropriate Action		▼
D	4-Signature	▲	▼
AES	3-Surname	▲	▼
CCU	2-Appropriate Action	▲	

ADDING A PREDEFINED PROCESS TO A RECORD

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


- Routing Type:** Electronic, Hard copy
- Assigned To:** Office (FWS), Individual
- Task Due Date:** [Date picker]
- Task Assigned Date:** [Date picker]
- Task Completed Date:** [Date picker]
- Task:** Select Task [Dropdown]
- Predefined Processes:** Process Name [Dropdown]
- Send Email:**
- Assigned By:** [User selection]

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

Step (2) Selecting a Routing Type.

Step (3) Click the **Predefined Processes checkbox** in the Routing screen and select a Process from the dropdown list.

Step (4) Check Send Email box.

Step (5) Click the Save Routing button  on the right side of Routing Screen to save your Predefined Process. The Routing Tree refresh displaying your predefined routings.

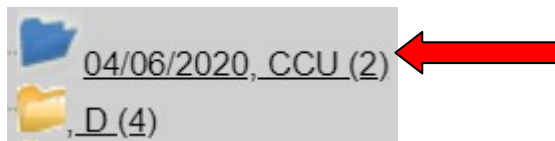
Note: You use the Predefined Process for adding multiple addresses and you have the choice to open all the routings at once for simultaneous distribution, or open one routing at a time.

(e.g. Service Directorate). Follow steps (1) and (2), enter the Task Due Date, Task Assigned Date, and click the Send Email checkbox. Click the Save Routing button and your routings will be saved and sent. Ensure you upload any attachments before completing this process.

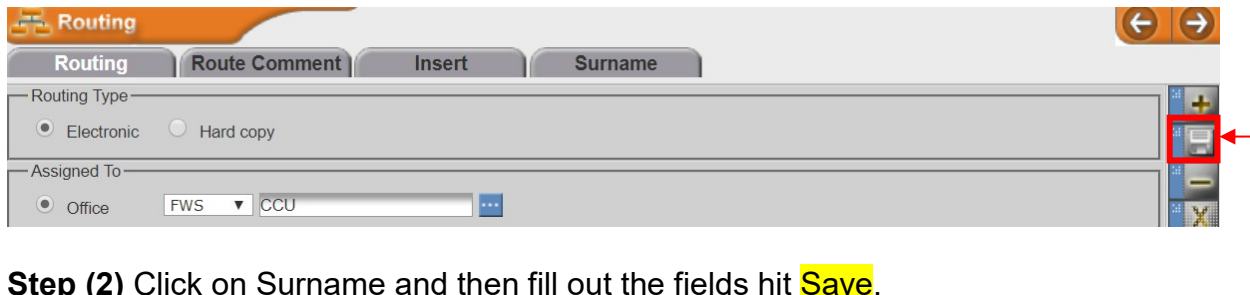
ELECTRONIC SURNAMING

Note: Once you have reviewed the attachments in the current record and you are ready to move the record forward, please add your or your supervisor's electronic surname.

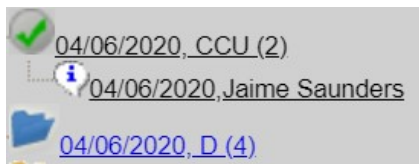
Step (1) Click the appropriate routing that you want to add a surname to (normally you click on your assigned routing):



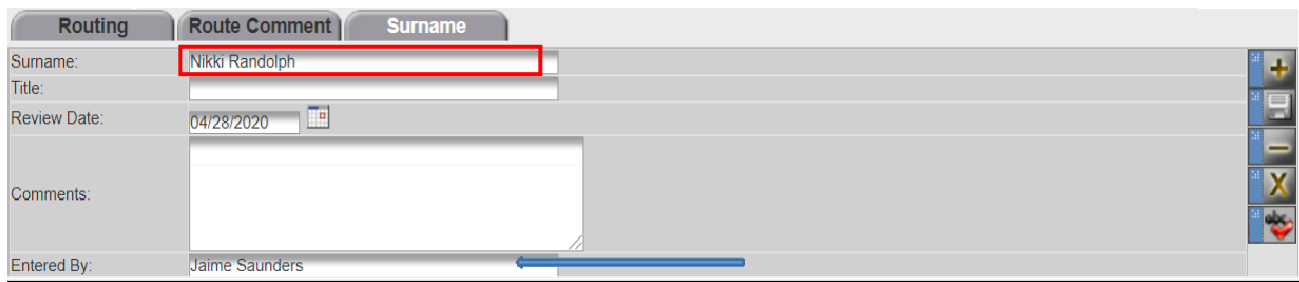
You will see the following tabs: Routing, Route Comment, Insert, and Surname.



Step (2) Click on Surname and then fill out the fields hit **Save**.



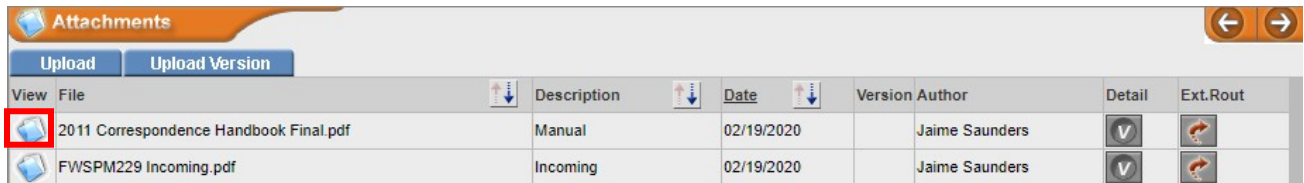
Note: if you are surnaming the document you only have to hit the save button. If you are surnaming for someone else, remove your name and type their name hit save. See the following example of user surnaming for the Chief of CCU.









CHAPTER 5


- Opening an Attachment
- Adding an Attachment
- Versioning an Attachment
- Deleting an Attachment

OPENING AN ATTACHMENT



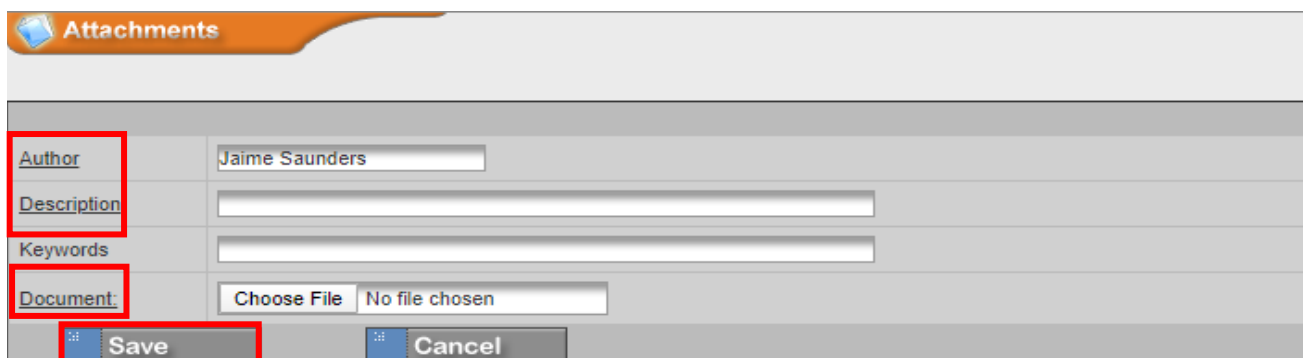
View	File	Description	Date	Version	Author	Detail	Ext.Rout
	2011 Correspondence Handbook Final.pdf	Manual	02/19/2020		Jaime Saunders		
	FWSPM229 Incoming.pdf	Incoming	02/19/2020		Jaime Saunders		

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

Step (2) Click on the Attachment  button in the View column of the document you want to open.

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

ADDING AN ATTACHMENT



Attachments

Author: Jaime Saunders

Description:

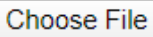
Keywords:

Document: No file chosen


Step (1) Click the Attachment  button.

Step (2) Click the  in the Attachments Screen.

Step (3) Input the following information:

- **Author (required field):** Type name of author ***** Author in DTS doesn't always mean that person wrote the correspondence.
- **Description (required field):** Type brief description of file.
- **Key Words:** Type keywords (optional)
- **Document (required field):** Click the  and locate the file you want to attach.

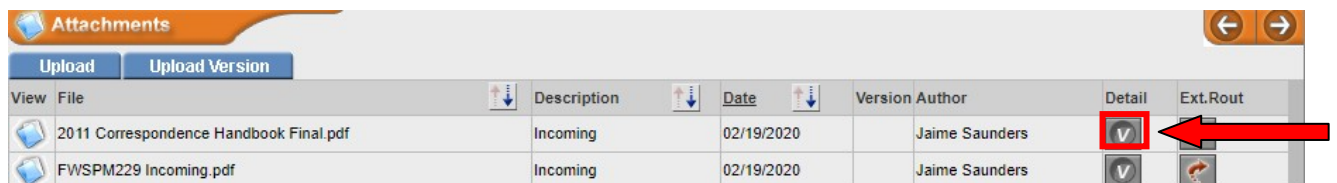
Step (4) Press the  button.






Step (5) Click the  button click on Attachments on the Right side of your screen.

Note: you can add as many attachments as required.

VERSIONING AN ATTACHMENT

Step (1) Click the Attachment  over the Tree or click on the Attachment Heading Attachments in the Routing tree.



View	File	Description	Date	Version	Author	Detail	Ext.Rout
	2011 Correspondence Handbook Final.pdf	Incoming	02/19/2020		Jaime Saunders		
	FWSPM229 Incoming.pdf	Incoming	02/19/2020		Jaime Saunders		

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

Attachments									
Upload Version		Finalize							
View	File	Description	Comment	Date	Version	Status	Pending	Edit	
	2011 Correspondence Handbook Final.pdf	Incoming		02/19/2020		Pending			
Return to Summary:									

Step (3) Click the **Upload Version** tab.

Attachments	
Version:	# 2
Author	Jaime Saunders
Description	DTS User Manual with Edits
Keywords	
Document:	<input type="button" value="Choose File"/> DTS updated... anual.docx
Comment:	Updated <u>DTS</u> User Manual
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Step (4) Fill out the required fields and press the **Save** button, and you will be presented with a confirmation.

Step (5) Click the **Go Back** button.


Attachments									
Upload Version		Finalize							
View	File	Description	Comment	Date	Version	Status	Pending		
	2011 Correspondence Handbook Final.pdf	Incoming		02/19/2020	V1	Draft			
	DTS updated manual.docx	DTS User Manual with Edits	Updated DTS User Manual	02/21/2020	V2	Pending			
Return to Summary:									







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


Deleting an Attachment


*******WARNING***** DTS Users should only delete attachments that they uploaded. When in doubt about deleting an attachment, please contact CCU for guidance.**


Step (1) Click the Attachment  button and Attachments in the Routing Tree.

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


Upload Version	Finalize								
View	File	Description	Comment	Date	Version	Status	Pending	Edit	
	2011 Correspondence Handbook Final.pdf	Incoming		02/19/2020	V1	Draft			
	DTS updated manual.docx	DTS User Manual with Edits	Updated DTS User Manual	02/21/2020	V2	Pending			

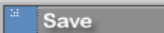
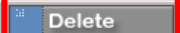
Return to Summary: 


Step (3) Click the Edit button  to the right of the document to be deleted.

 Attachments

Content Type:	application/vnd.openxmlformats-officedocument.word
Input Date:	02/21/2020 10:22:53 AM
Input by user:	Saunders, Jaime
File name:	<input type="text" value="DTS updated manual.docx"/>
Author:	<input type="text" value="Jaime Saunders"/>
Description:	<input type="text" value="DTS User Manual with Edits"/>
Keywords:	<input type="text"/>


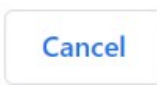
Return to Summary: 

Step (4) Click the  button. A confirmation box will pop up. Select OK or cancel.

dts.fws.gov says


Are you sure you want to delete this version of the attachment?

Step (5) Click the  button.

CHAPTER 6


- Creating a Control Slip
- Adding Comments to a Control Slip
- Printing out a Control Slip

Step (1) In an open record, click the Control Slip button  located on the right at the very bottom of the Routing Tree or the Control Slips heading Control Slips.

Step (2) Click the button  and the following screen will display.




Note: You can also include comments on the Control Slip by typing in your information in the blank screen Comments block and press the Generate Control Slip button. If you do not wish to include comments, just press the Generate Control Slip button.

Step (3) Click the button . Your Routing Tree will display the total of number of generated control slips.

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

Control Slips are normally for Hard Copy Packages. Since March 2020, the Service hasn't used the control slips, and moving packages electronically does not require a control sheet.

The following is an example of Control Slip.



FISH AND WILDLIFE SERVICE
DOCUMENT TRACKING CONTROL SLIP

FWS Form 3-2180
Attach to front of folder

Date: 05/14/2020

DCN: TRN0005400		ES No:
Orig Office: CCU	Input Date: 02/19/2020	Addressee: Director, USFWS
Due Date:	Signature Level:	
Subject: Welcome to DTS		
Comments:		


Task Codes:

0 - Prepare Draft Reply	8 - Other - See Comments	20 - All Employee Message
1 - Prepare Reply	9 - Mail/Distribute	21 - Approved
2 - Appropriate Action	14 - File	22 - Disapproved
3 - Surname	15 - For Your Information	23 - Duplicate Package
4 - Signature	16 - Surname through DTS	
5 - Review/Comment	18 - Lost Package	
6 - Revise	19 - Cleared for Publication	

Routing:

Assigned To	Task	Assigned Date	Due Date	Completed Date
CCU	2 - Appropriate Action	02/19/2020		02/19/2020
IR01	0 - Prepare Draft Response	02/25/2020		02/28/2020
D	4 - Signature	02/25/2020		02/26/2020
CCU	2 - Appropriate Action			
AES	5 - Review/Comment			

Step (4) Click the button  to print out a control slip.
Your control slip will be open in Acrobat PDF file format.

Step (5) Click  at the top right to print out the control slip.


CHAPTER 7

- Simple Search
- Advance Search

There are two options to search for records in the DTS: Simple Search and Advance Search.


SIMPLE SEARCH

The screenshot shows the 'DTS-Search Database-FWS DTS-Items=32988' interface. It features a navigation bar with 'Main', 'Search', and 'Reports' tabs. Below the navigation bar, there are search criteria fields for DCN, Subject, Orig. Office, Input Date, Last Name, Due Date, and ES No. There are also 'Result Options' and 'Sort Order' sections. A red box highlights the 'FWS DTS National Database' dropdown menu. Another red box highlights the 'Advance Search Screen' button.


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

Step (2) Select **a database** to search from. You can also select “All databases” to search all of the databases you are authorized to view.

Step (3) Select other fields that are included in Simple Search to scope your search.

-  - Enter the criteria for your search using the following searching operators if desired, but not required.

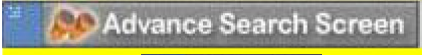

Searching Operators	
=	Equal to the value specified
~	Not equal to the value specified
*	Containing the value specified

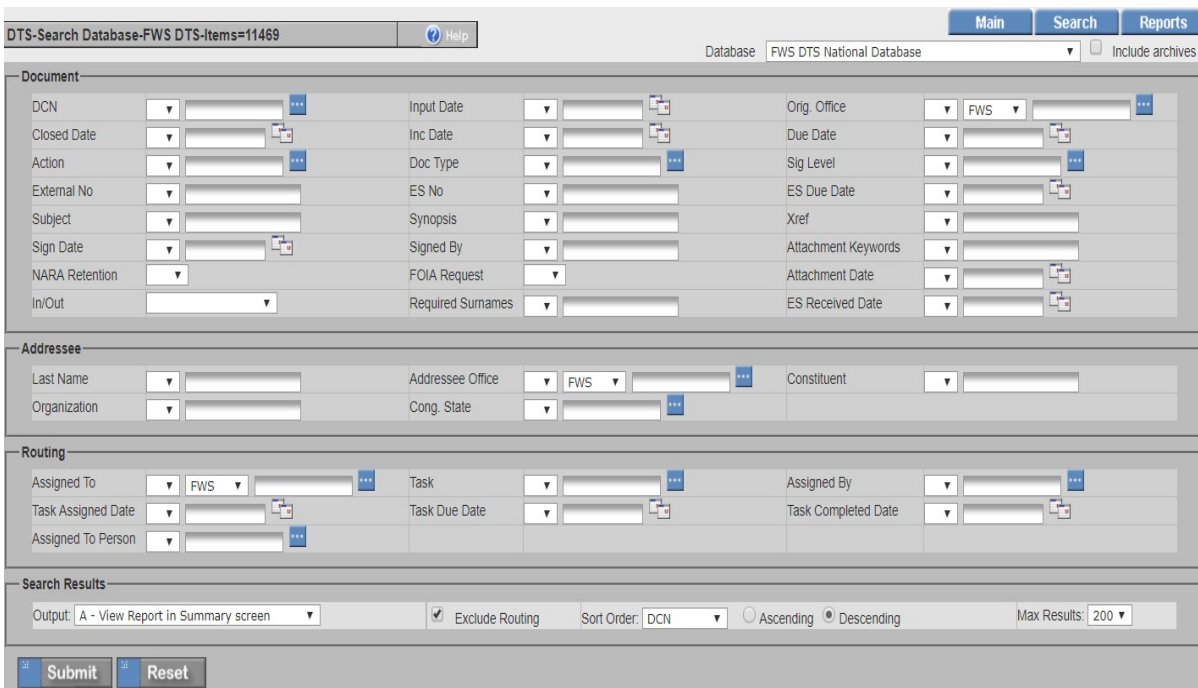
- Data Range Screen – Click the  icon to bring up the date range screen. Click the calendar icons to select a From Date and a To Date, then click Save.
- Result Options – select an option to view or download a search result in a form of a report.

Step (5) Press the  button.

If you still can't find the record you are looking for and have exhausted every imaginable search option, please contact CCU for further assistance.

ADVANCE SEARCH

Step (6) To further refine your search, click on the  button and define your search criteria and press the  button.



DTS-Search Database-FWS DTS-Items=11469 [Help](#) Main Search Reports

Database: FWS DTS National Database Include archives

Document

DCN	<input type="text"/>	Input Date	<input type="text"/>	Orig. Office	<input type="text"/>
Closed Date	<input type="text"/>	Inc Date	<input type="text"/>	Due Date	<input type="text"/>
Action	<input type="text"/>	Doc Type	<input type="text"/>	Sig Level	<input type="text"/>
External No	<input type="text"/>	ES No	<input type="text"/>	ES Due Date	<input type="text"/>
Subject	<input type="text"/>	Synopsis	<input type="text"/>	Xref	<input type="text"/>
Sign Date	<input type="text"/>	Signed By	<input type="text"/>	Attachment Keywords	<input type="text"/>
NARA Retention	<input type="text"/>	FOIA Request	<input type="text"/>	Attachment Date	<input type="text"/>
In/Out	<input type="text"/>	Required Surnames	<input type="text"/>	ES Received Date	<input type="text"/>

Addressee

Last Name	<input type="text"/>	Addressee Office	<input type="text"/>	Constituent	<input type="text"/>
Organization	<input type="text"/>	Cong. State	<input type="text"/>		

Routing

Assigned To	<input type="text"/>	Task	<input type="text"/>	Assigned By	<input type="text"/>
Task Assigned Date	<input type="text"/>	Task Due Date	<input type="text"/>	Task Completed Date	<input type="text"/>
Assigned To Person	<input type="text"/>				

Search Results



Output: Exclude Routing Sort Order: Ascending Descending Max Results:

CHAPTER 8

- Creating a Report
- Scheduling a Report

CREATING A REPORT



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

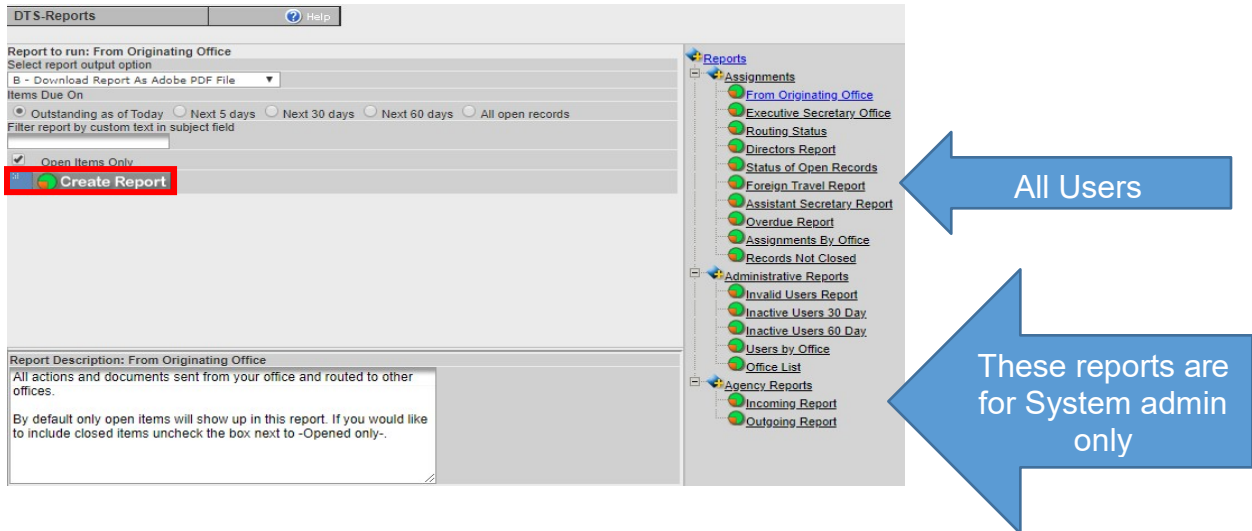
Step (2) Select a report from the Tree View.

The Following are Standard Reports for anyone to use:

- From Originating Office – User's assigned office
- Executive Secretary Office – Assignments to FWS from Secretary's Office
- Routing Status – User can select an office to view routing status
- Directors Report – Tracks correspondence that has been routed from an originating office to any office and is currently not completed.
- Status of Open Records – User can select from an Originating Office to a Head Office. Report will show open assignments to selected Head Office and sub-offices.
- Foreign Travel Report – Shows open documents with the DocType of Foreign Travel.
- Assistant Secretary Report
- Overdue Report
- Assignments By Office


- Records Not Closed

Step (3) Once you click on a report from the tree view, the following screen will appear.



Step (4) Select the output format from the dropdown list.

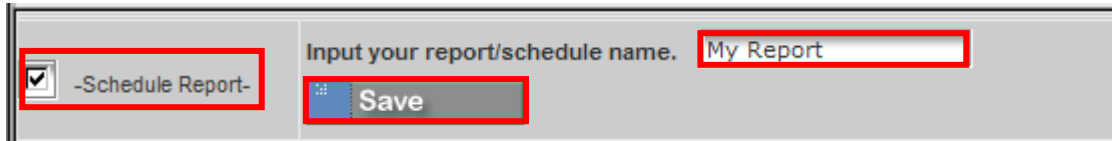
Step (5) Select the results of Outstanding as of Today, Next 5 days, Next 30 days, or Next 60 days, or All open records.

Step (6) Click the Create Report button 

Step (7) Click the View Report button as shown below. A box will appear that gives you the options of opening and printing the report or downloading the report to your computer.



SCHEDULING A REPORT

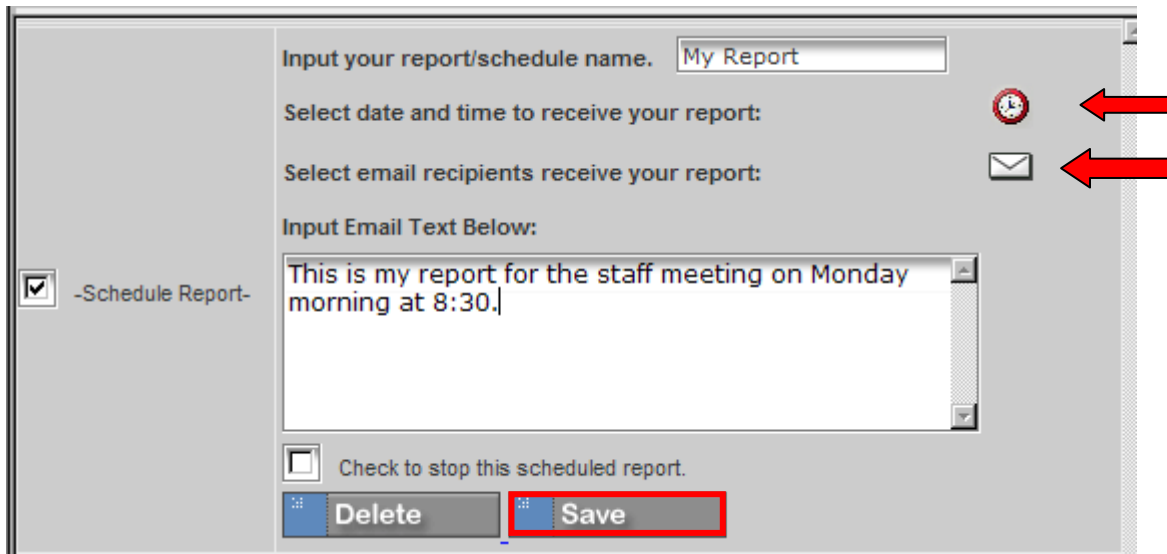


A screenshot of a software interface for scheduling a report. On the left, there is a checkbox labeled '-Schedule Report-' which is checked. To its right is a text input field containing 'My Report'. Below the input field is a blue button labeled 'Save'.

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



A screenshot of the report scheduling interface. The 'Schedule Report' checkbox is checked. The report name is 'My Report'. Below this, there are three sections: 'Select date and time to receive your report:' with a red clock icon and a red arrow pointing to it; 'Select email recipients receive your report:' with a white envelope icon and a red arrow pointing to it; and 'Input Email Text Below:' with a text area containing 'This is my report for the staff meeting on Monday morning at 8:30.'. At the bottom, there is a checkbox labeled 'Check to stop this scheduled report.' and two buttons: 'Delete' and 'Save'.

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

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

Note: Please contact CCU for additional training in the creation of custom reports and other items left off this training ensuring job security for our staff.

CHAPTER 9

- How to Lock a Record
- How to Set up a Work Flow Report
- How to Close Records When Finalized

HOW TO LOCK A RECORD

If you need to modify a record that has been locked by another user, click on the link at the top of the Routing Tree to send the user an email asking the user to unlock the record.



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

Record	DCN	Task Assigned	Task Due Date	Last Name	Subject
 	034851	04/01/2008	04/02/2008	DTS Users, Nash	New DTS User Manual

HOW TO SET UP A WORK FLOW REPORT

On the bottom-middle of the Main Information Screen, there is a checkbox to set up a Work Flow Report. Use the work flow to keep track of where records are at anytime during the process.

To set up a work flow report:

Xref Sign Date

Medium Signed By

Lock Record Work Flow Report Setup

Step (1) Check the box.

Step (2) Click on the white envelope and select the names of those you want to receive reports on this particular record. Click the button and close the screen. (If no names are selected the originator of the report receives the report via email.)

Address Book: Last name: Search

Name	Selected
<input type="text"/>	<input type="text"/>

Save

Input Type:

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.

HOW TO CLOSE RECORDS WHEN FINALIZED

A DTS record should be closed when it has been finalized and no longer needed.

Step (1) Click the following button to close all open routings.



Step (2) Press the calendar button and select an appropriate date in the Closed Date Field of the open record as shown below.

Search for DCN: <input type="text"/>		Go							
DCN	<input type="text" value="TRN0005400"/>	Input Date	<input type="text" value="02/19/2020"/>	Orig. Office	CCU				
In/Out	I-Incoming document	Inc Date	<input type="text"/>	Due Date	<input type="text"/>				
Action	2-Appropriate Action			External No	<input type="text"/>				
Doc Type	BP-Briefing Paper	<input type="checkbox"/>	!	ES No	<input type="text"/>				
Sig Level	Select Signature Level			ES Due Date	<input type="text"/>				
Subject	Welcome to DTS								
Synopsis	Training assignment for Jaime Saunders								
Ack Date	<input type="text"/>	Xref	<input type="text"/>	Sign Date	<input type="text"/>				
Interim Date	<input type="text"/>	Medium	Select Medium	Signed By	<input type="text"/>				
Closed Date	<input type="text"/>	<input type="checkbox"/>	Lock Record	<input type="checkbox"/>	Work Flow Report Setup	<input type="checkbox"/>	NARA Retention	<input type="checkbox"/>	FOIA Requ

Step (3) Press the save button .

CHAPTER 10

Summary of Field Definitions

Note: underlined text is a required field throughout DOI.

DCN	DCN stands for Document Control Number. A number assigned by the system automatically when you save the record. You cannot enter any information in this field.
<u>Input Date</u>	Populates with today's date; press the calendar button and select appropriate date if different than today's date.
Orig. Office	The system will insert your office when you save the record. You cannot enter the information in this field.
<u>In/Out</u>	(Incoming/Outgoing) Incoming document is one that is coming into the Service (your office) for response or other action. An outgoing document is one that originates within the Service that is not in response to an incoming. Select appropriate entry from dropdown.
Inc.Date	Date on incoming letter/document. Press the calendar button to select appropriate date. Do not enter a date for an outgoing document.
Due Date	Due date for lead office is the date by which all action must be completed. Press the calendar button to select appropriate date.
<u>Action</u>	This is the overall action for the document; select from the dropdown list.
<u>Doc. Type</u>	(Document Type) Select from dropdown list. Be as specific as possible; e.g., for a memorandum on competitive sourcing, select "Competitive Sourcing," not "Memoranda."
Sig. Level	Select appropriate signature level from dropdown list.
External Number	Use for another number related to your document; e.g., RIN for Federal Register documents; GAO number for audits, etc.
ES No.	Control number assigned by Executive Secretariat
ES Due Date	Due date assigned by Executive Secretariat; press the calendar button to select appropriate date.
<u>Subject</u>	Enter brief subject of document. This field will show up on reports and space is limited. Be specific so you will be able to locate it in a search. Do not put "Travel Authorization," or "Request for Actual Expenses," as your subject. If you are looking for a specific action, these subjects will not help you find it. Better subjects would be: Travel Authorization - John Doe - Phoenix, AZ – 5-22-07
Synopsis	Further explanation of subject if needed

Ack Date	If an acknowledgement letter is sent, enter date by selecting calendar.
Interim Date	If an interim response is sent, enter date by selecting calendar.
XRef	Cross Reference - Enter DCNs of other documents that pertain to this record. For example, if you received a previous letter from the same addressee on the same subject, enter the DCN of the first letter in this field.
Medium	Select how you received the letter/document from the dropdown list.
Signed Date	Date document is signed. Press the calendar button to select appropriate date.
Signed By	Name of person who signed the document.
Closed Date	Date of record was completed. Press the calendar button to select appropriate date.
Lock Record	It will prevent other users from making changes while you're working on the record. Other users will be able to view the record, but not change anything until you unlock it.

Remember this DTS Manual is a living document, as new tools are created to assist all of us in managing our digital documents. All suggestions, feedback, and ideas are always welcomed and always considered for adaptation if possible

U.S. Fish and Wildlife Service
Correspondence Control Unit
202-208-7535
