DATA TRACKING SYSTEM
USER MANUAL

Correspondence Control Unit 2024

Table of Contents

A Note from Nikki Randolph, Chief, of the U.S. Fish and Wildlife Service's (Service) Correspondence Control Unit (CCU) and U.S. Department of the Interior (DOI) Data Tracking System (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.

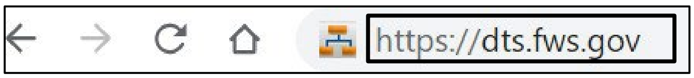
When mass teleworking was pushed in March 2020, some were concerned about how to get work accomplished in a timely manner without being in the office. However, because DTS was designed for exactly this type of situation, the Service seamlessly transitioned into a digital world, and the DTS System become 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. 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 WELCOME TO DTS

Connecting To DTS

1. Enter the following link in your preferred browser (Chrome and Edge) https://dts.fws.gov



2. Press Enter

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

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.

Life Cycle of the DTS

Figure 1 Image of Life Cycle of DTS

Top reasons for using DTS for all your correspondence tracking:

- Virtual strorage 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.

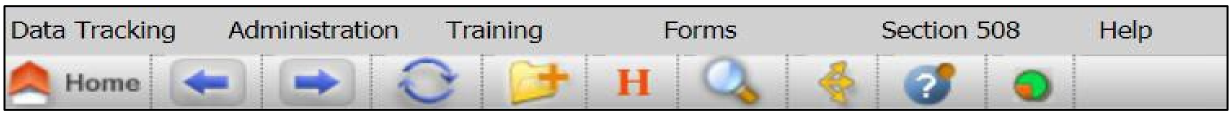


Figure 2 Image of Navigation Bar with Icons

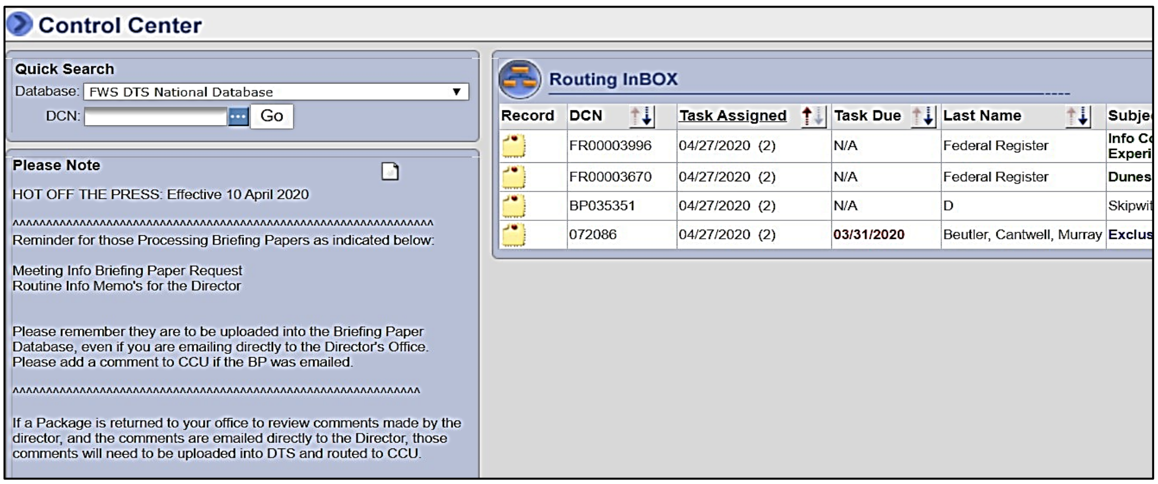


Figure 3 – Image of Control Center

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

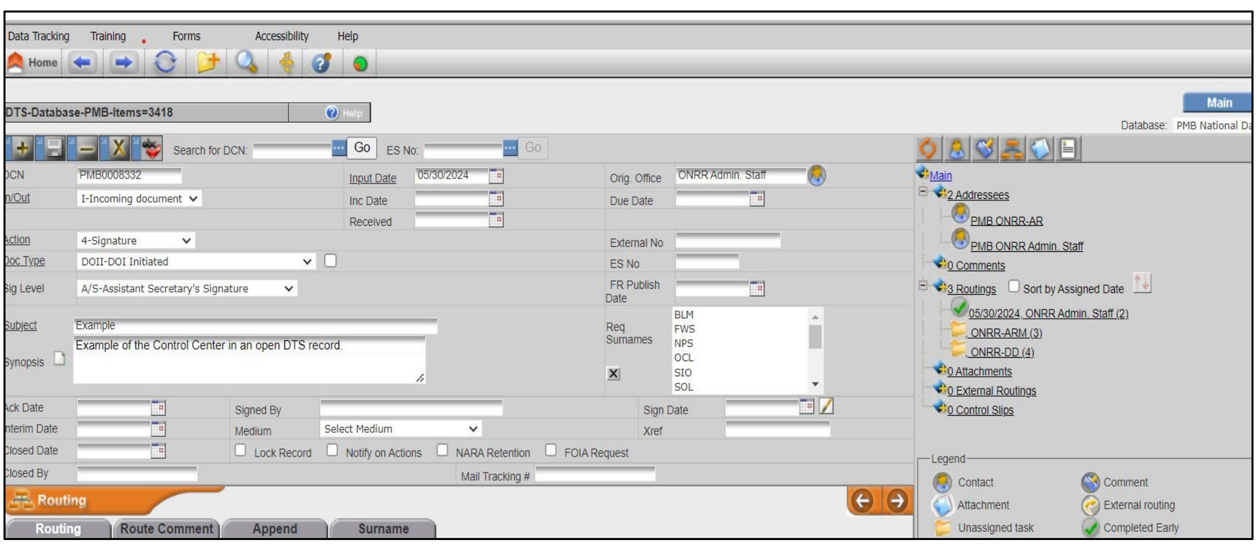
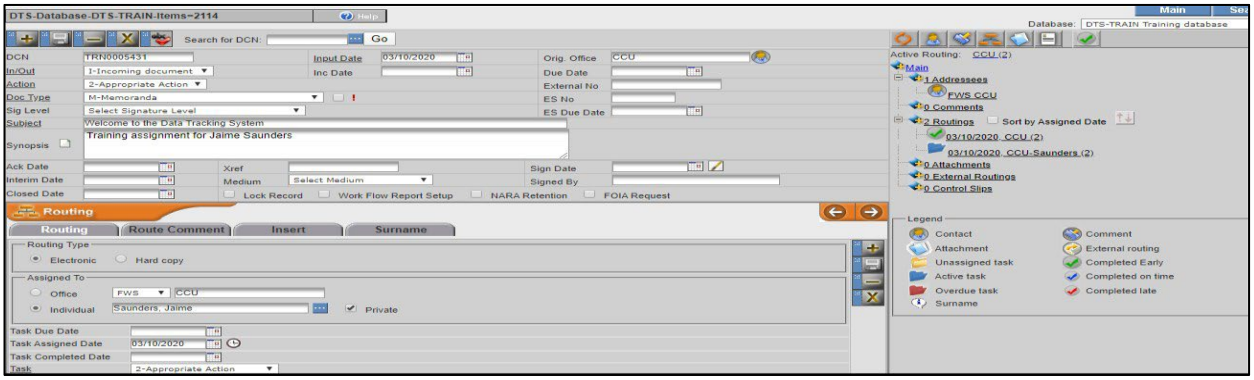


Figure 4 Image of Control Center in an Open DTS Record

The Control Center in an open record [Figure 5] is divided up into three sections:

Core Information **Routing Tree**



Task Assignment

Figure 5 Image of Open Record Control Center Divided into three sections

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

- 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.

- 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.

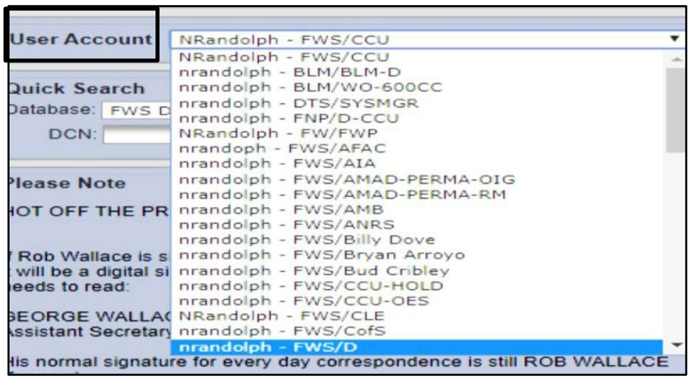
CHAPTER 2 NAVIGATING DTS

Selecting Your User Account

DTS will automatically open 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.

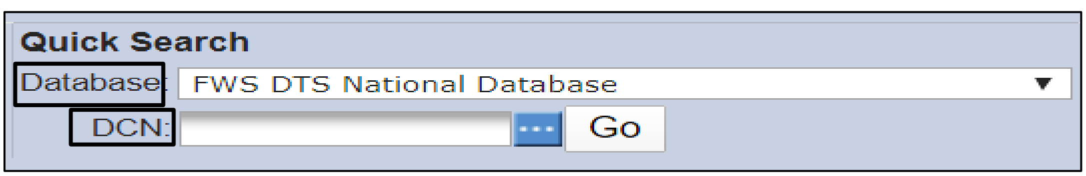
User Account: Nikki Randolph-FWS/CCU

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

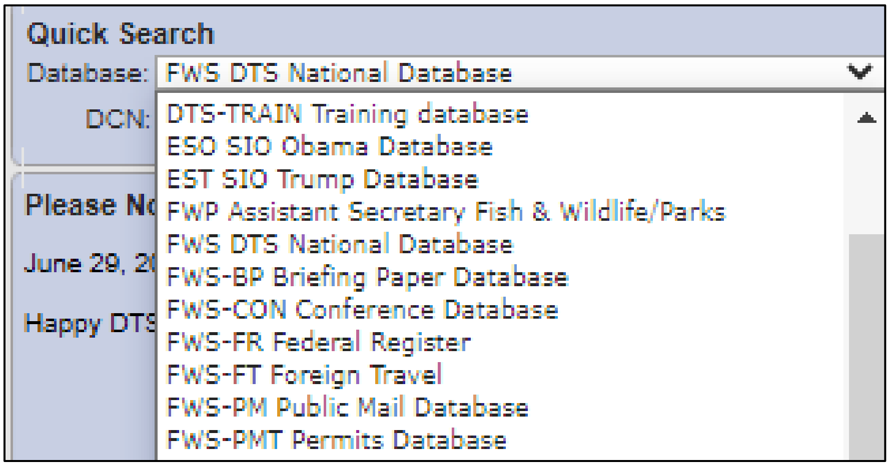


Quick search

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



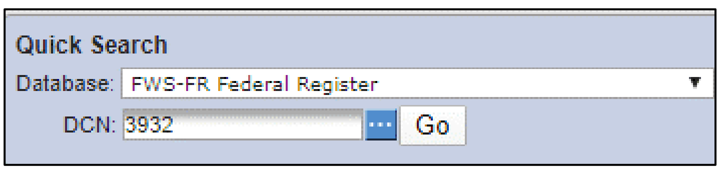
DTS manages multiple databases of information. This is just a sample of the many databases that are used in this system. (Note: All DOI Bureaus have their own Database, and several use multiple databases: contact your DTS administrator for more information on the function of their databases).



How to Use Quick Search:

1. Select the correct database.
2. Input the correct DCN number.
3. Press Enter or click the Go button.

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



Navigation Bar

The Navigation Bar is at the top left of the DTS screen below the Menu Bar. Here are the definitions of icons of the Navigation Bar:

1. Home (House with red roof icon). Push the home button any time you want to return to your home screen.
2. Backward and Forward (Blue back and forward arrows icon) Use the arrows to navigate back and forth between screens.
3. Refresh (two blue arrows making a circle icon). Use this icon to refresh your screen.
4. Search (Magnifying glass icon). Take the user to the Simple Search Screen.

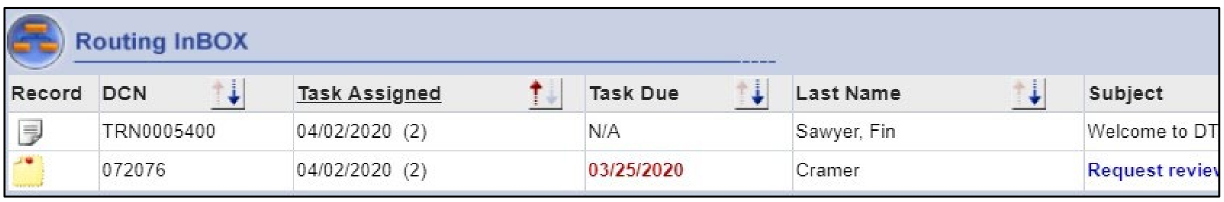
5. Predefined Process (Three yellow arrows icon). Create/edit pre-defined routings.

6. Help (White question mark in blue circle icon) Activate and deactivate your user settings for tool tips.

7. Reports (Green and red pie chart icon).

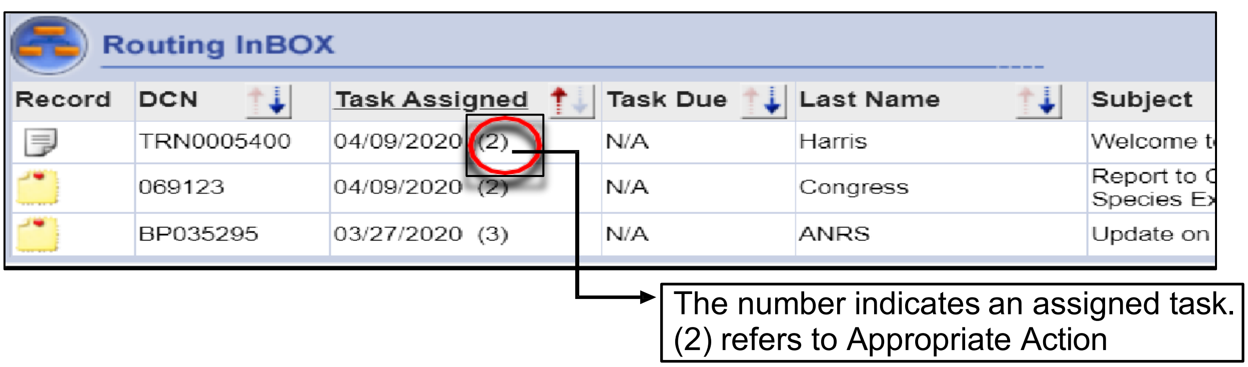
Understanding Your Inbox

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).



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 can sort, however, once you leave the inbox and return, DTS automatically reverts to the original sort.



- RECORD is the package in a hard copy or an electronic form. A hard copy record will have the paper icon. A electronic record will have a

- 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 out more later in this guide.

0. Prepare Draft Response: Someone outside of your program will sign the completed correspondence.

1. Prepare Reply: Once correspondence clears your program/region will sign the completed correspondence.

2. Appropriate Action: Your program decides what the appropriate action is.

3. 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!)

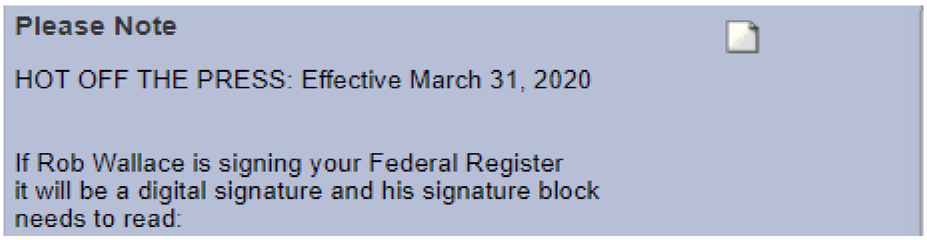
Foreign Travel are Orange.

Federal Registers are Green.

This helps those offices that have heavy DTS traffic to quickly identify these records quickly.

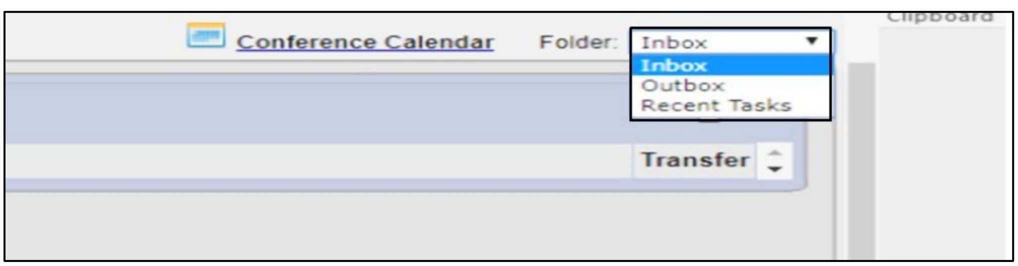
Please Note Section

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.



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.



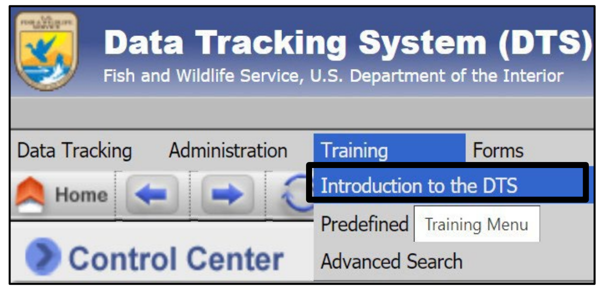
The Recent Task inbox will list everything you recently worked on, and it comes in handy when you need to find a record you worked on quick and can’t remember the number.

Training

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

1. Click on the Training button as shown below.

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



Section 508 Compliance

The following links provide information, tools, and training on Section 508 and how to create accessible content.

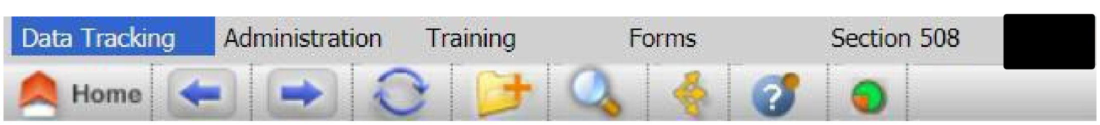
https://www.doi.gov/ocio/section508

https://www.section508.gov/create/

https://www.section508.gov/training/

Help In the Control Center

This Help button above the Navigation Bar will display information of the upcoming changes in DTS and give you a list of DTS administrators’ contact information for Bureaus and Offices.



DTS Contact Information

Password and Login Issues

DTS authenticates users through the DOI Active Directory Service. If you have problems with your password, please contac

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 gener

Agency	Contact Name	Phone	Email
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

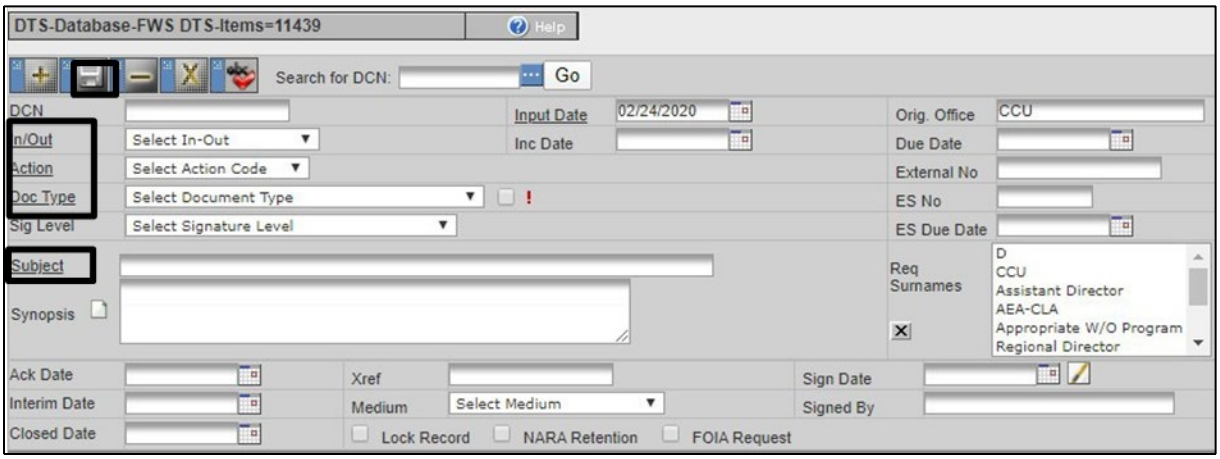
Chapter 3 Records

Adding A New Record

1. Click the Add New Record button on the Navigation Bar.
2. Select the appropriate database from the drop-down menu.
3. Click the Continue button. The following screen will display:

    Fill in the required fields.

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



4. Click the Save button to save your record.

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

Adding A New Addressee

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

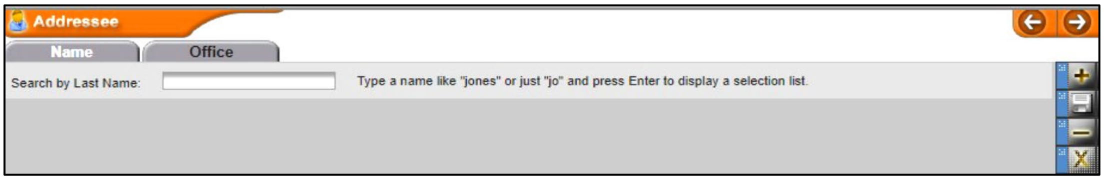
Outgoing document – Refers to documents that are being sent out from the Service that isn't dictated by an incoming response.

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.

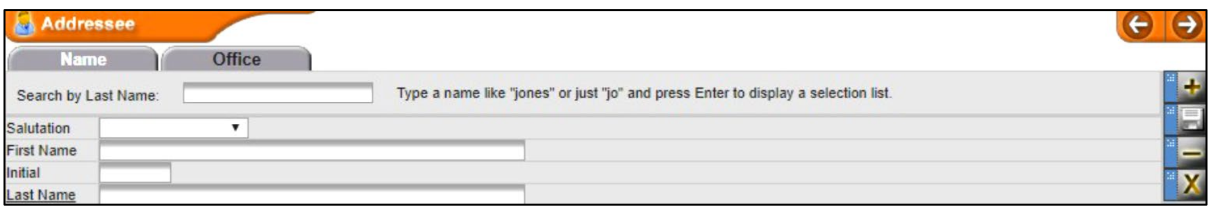
The Following are a few samples of how to address certain documents that don't have an addressee:

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.



1. If your lookup from Step (1) above does not produce the correct name, click the plus 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.



2. Once you fill in the Salutation, First Name, and Last Name, click Save button to save the new addressee.

Selecting an Addressee:

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.

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

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

Selecting an Office:

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 must be routed by CCU).

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

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

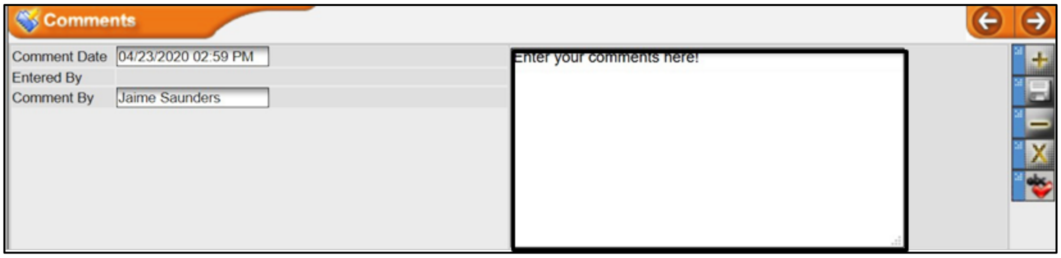
Adding Comments

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

1. Click comments heading or comment button on the routing tree.

2. The Comment Date and Comment By (DTS User) will be entered automatically. Enter your comments in the box.

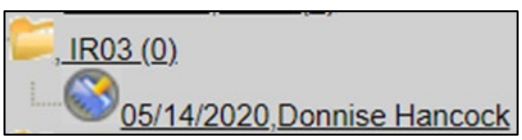


Add
Save
Discard
Delete
Check Spelling

3. Click the Save Button (floppy disc icon) to save the record.

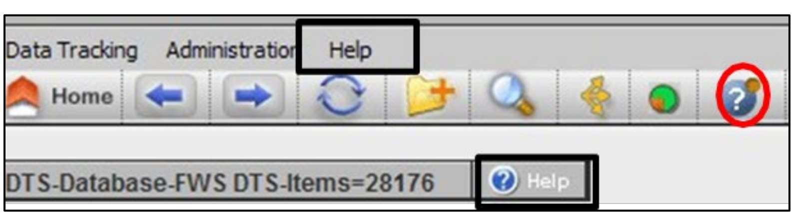
Comments Specific to a routing office

1. Click on the routing office for which the comment is for.
2. Click on the route comment tab in the Routing screen.
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).
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

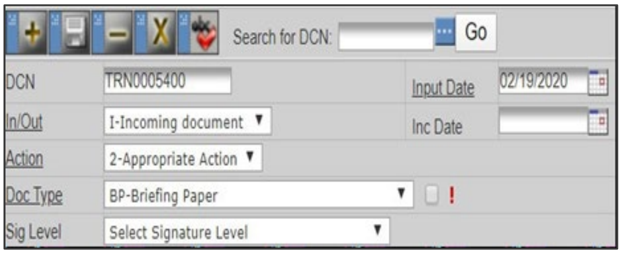
When you are in an actual DTS record and you need help, there are three types of Help as shown below.



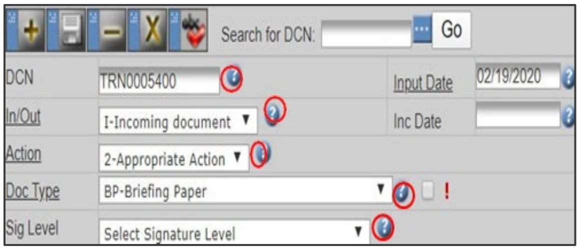
The Navigation Bar Help button allows users to turn on and off the tool. When the tool is turned on, the question mark icon is visible by each of the fields in the Main Information Screen and the Routing screen.

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

Tooltip hidden



Tooltip displayed.



The Help Icon gives a 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 ROUTINGS

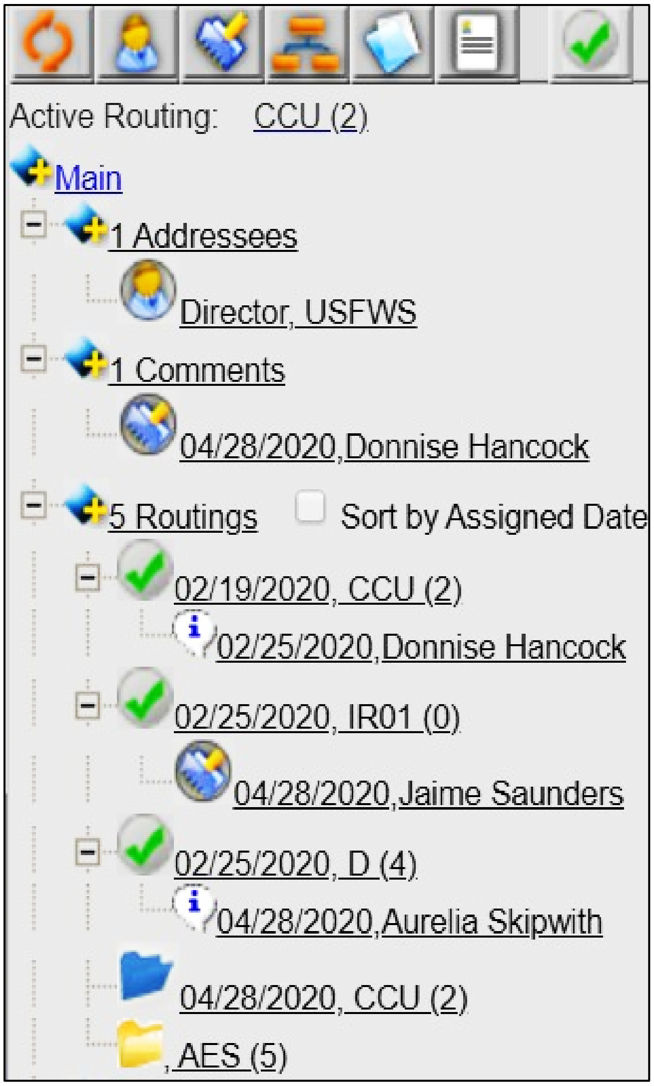
Understanding The Routing Tree

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:

- The Refresh (orange arrows in a circle) icon will refresh the tree.
- The Add Addressee (person) icon will open the Addressee Screen at the bottom left.
- The Comment (notebook with pencil) button will open the Overall Comments Screen.
- The Add Routings button will open the Routing Screen at the bottom left.
- The Attachments button will open the Attachments Screen at the bottom left.
- The Control Slip button will allow the user to create a Control Slip.
- The Close All Open Routings will allow the user to close all open routings.



The office name next to the Active Routing tells you what office it is current active routing.

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

You can click on the name under the Comment icon to see the comment for the entire record.

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

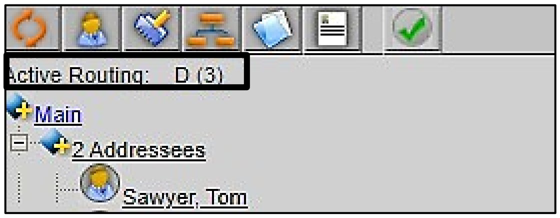
Once a routing has been created a yellow folder will appear.

Once a record has been assigned with a specific date, the folder icon will turn blue.

Once an assignment has been completed with a completed date, the blue folder icon will turn to a green check mark.

Active Routing

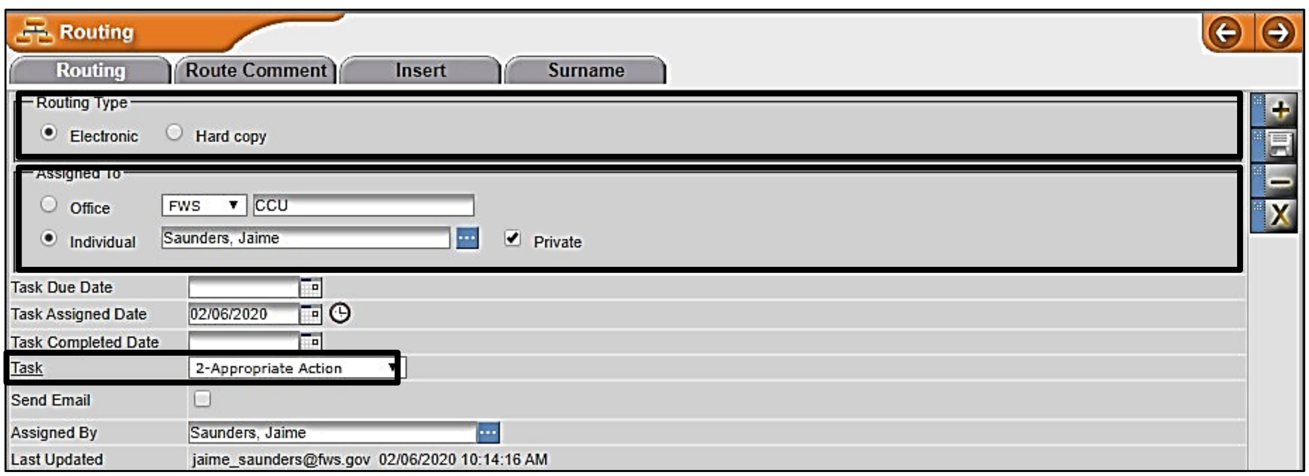
This example is a quick view of open routing(s) and the assigned task (e.g., D (3) = assigned to Director for surname). If there is more than one open routing, there will be a dropdown box. Clicking on the active routing will open that routing in the Routing Screen. You can also just scroll down to your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

1. In your current record, click the Routing Button (organizational structure icon with orange squares) located over the Routing Tree or click on the Routing Heading in the Routing Tree.



Input the following information:

Routing Type (required field): The Routing Type will automatically default to electronic.

Assigned To: (required field): Type the first few letters of the office acronym and click the Ellipsis button (blue button with dots) to select office.

Task Due Date: Enter due date for the Assigned To office.

2. Task Completed Date: The tasked office enters completed date when action is

completed and routes to the next office that is in the routing.

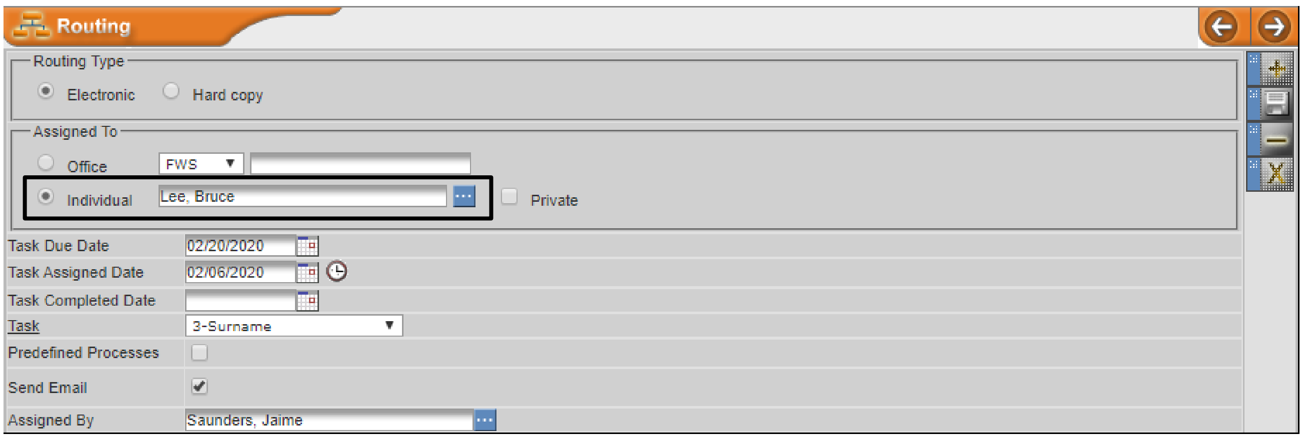
3. Send Email: Always click the send email box when routing to the next office thereby notifying users, they have a DTS assignment.

4. Assigned By: This field is populated automatically.

5. Click the Save Routing button (floppy disc) on the right side of the Routing Screen to save the routing.

6. To add additional routings, click the Add Routing button (plus button) on the right side of the Routing Screen and repeat steps 2 and 3.

Routing to an Individual



1. Click the Routing Button (organizational structure icon with orange squares).

2. Select Individual button in the Assigned To field, enter the individual's last name, and press the Lookup Button (blue icon with three dots) to select the individual.

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

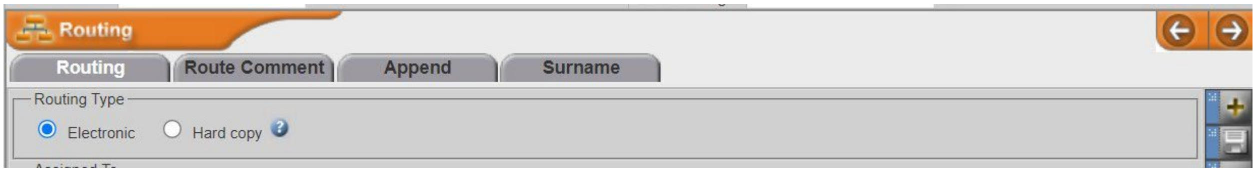
4. Fill in the remaining fields and click the Save Routing button (floppy disc icon) on the right side of the Routing Screen to save the routing.

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.

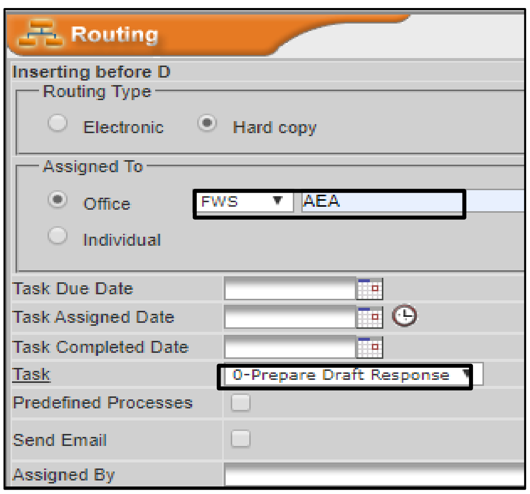
Inserting a Routing Between Two Existing Routings

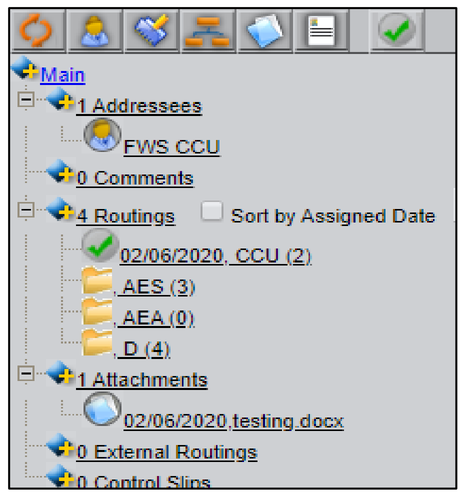
To insert a routing between two routings (append) in your routing list:

1. Click the routing that is below where you want to insert your new routing.
2. In the routing screen click on the append tab as shown below.



3. Fill out the required information and then click the Save Routing Button (floppy disc icon) on the right side of the Routing screen to save your inserted routing.





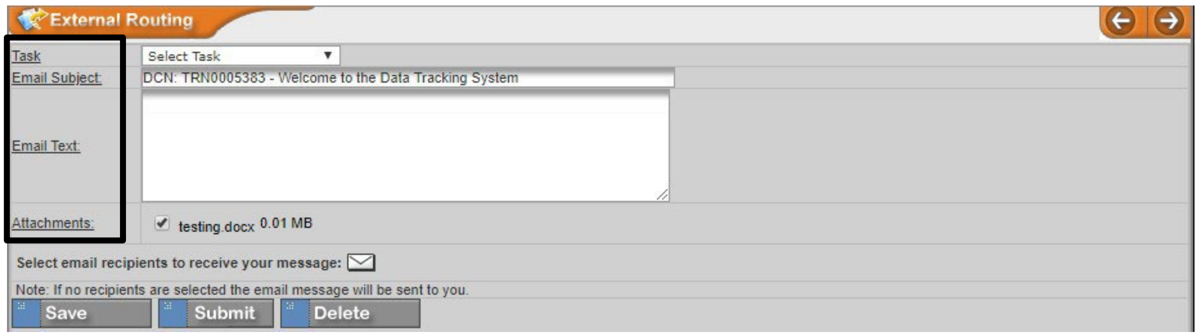
The Routing Tree will automatically refresh displaying your inserted routing.

Eternal 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.

1. Open the Attachments Screen.

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



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

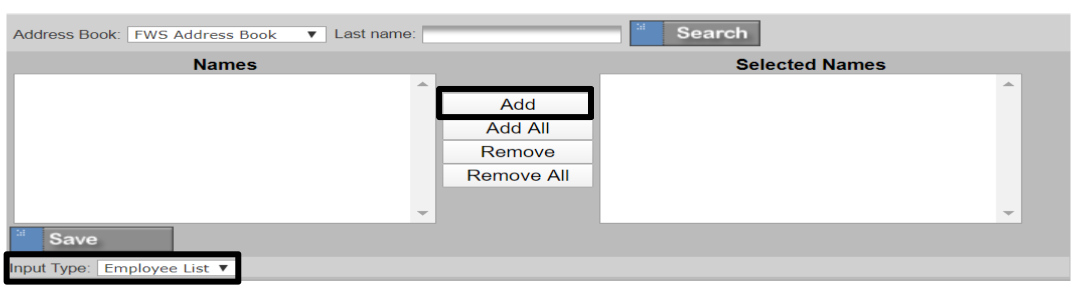
a. Task (required field): Select appropriate task from dropdown list.

b. Email Subject (required field): Type key words what an email is about.

c. Email Text (required field): Type a context for the entire email.

d. Attachments (required field): select to add all attachments.

4. Click the envelop icon 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)



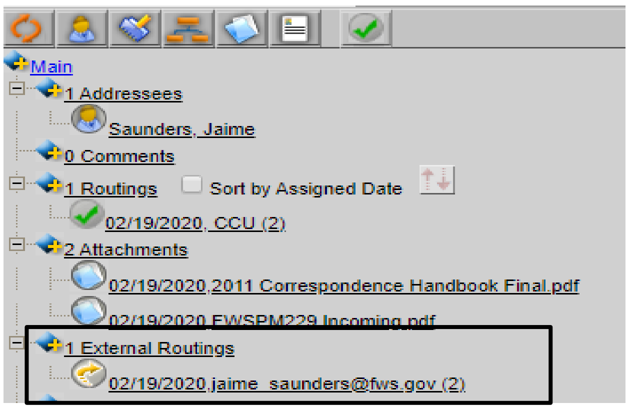
5. Once an address book is selected, enter a last name of individual you want to send an email to and click Search.

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

7. Once addressees are selected, click the Save Button at the bottom left corner and close the pop-up window.

8. Click the Submit button.

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



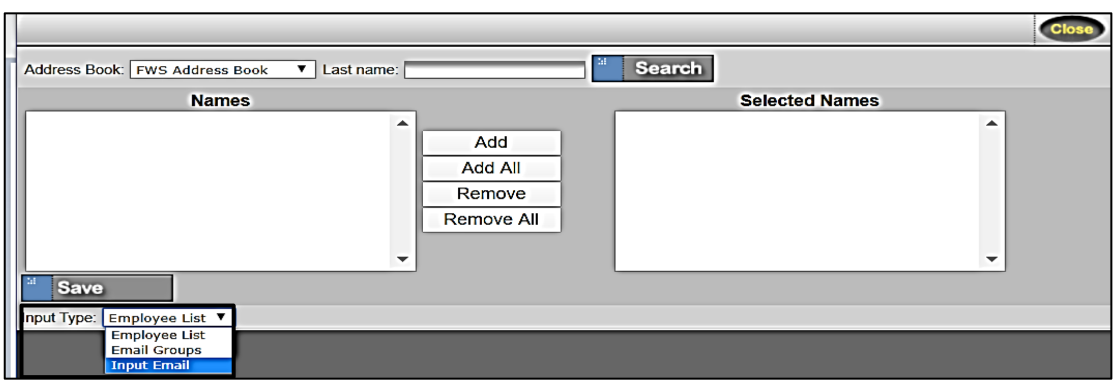
Using an External Email Address

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

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

2. Click the envelope icon.

3. Select Email Groups from the drop-down menu of input Type as shown below.



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

5. Once you click the Save icon in the bottom left corner, the email you just entered will disappear. Click the Close icon in the upper right corner.

6. Click the Submit button.

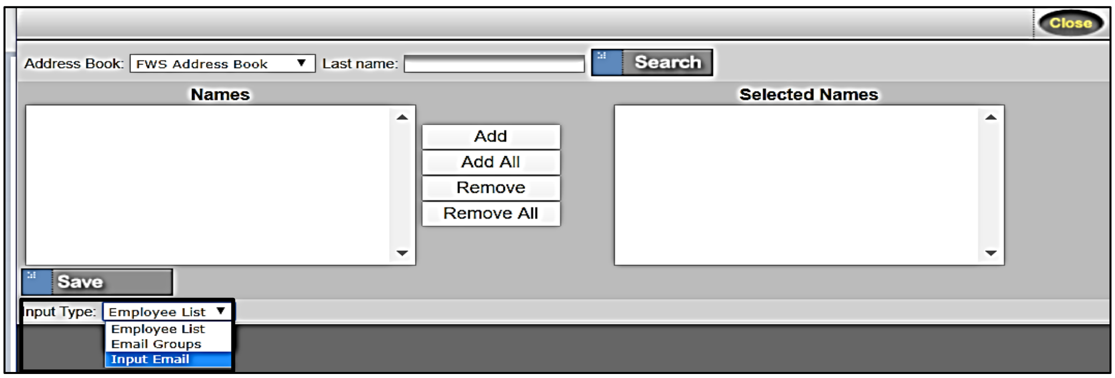
7. Confirmation of the email sent will pop in the Routing Tree after the Attachments list.

Using Email Groups

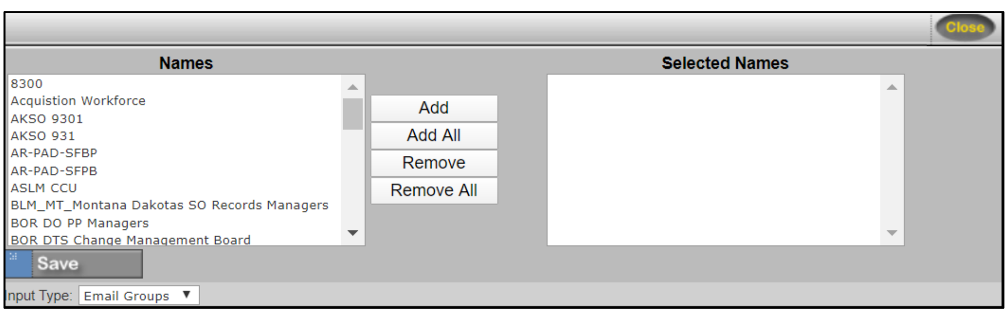
1. Repeat the steps (1) through (3) of the external routing using address books.

2. Click the envelope icon.

3. Select Email Groups from the drop-down menu of the Input Type at the bottom left corner of the pop up.



4. A screen will display with a list of email groups to select from. Select an email group you want and press the Add button.



5. Click the Save Button below the email group list and the Close button on the top right of the pop up.

6. Click the Submit button.

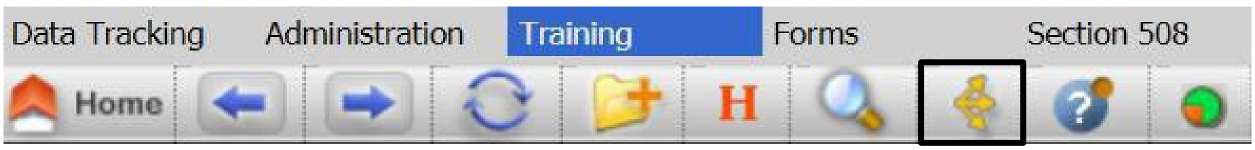
7. Confirmation of the email sent will pop in the Routing Tree after the Attachments listed.

Expediting Routings with A Predefined Process

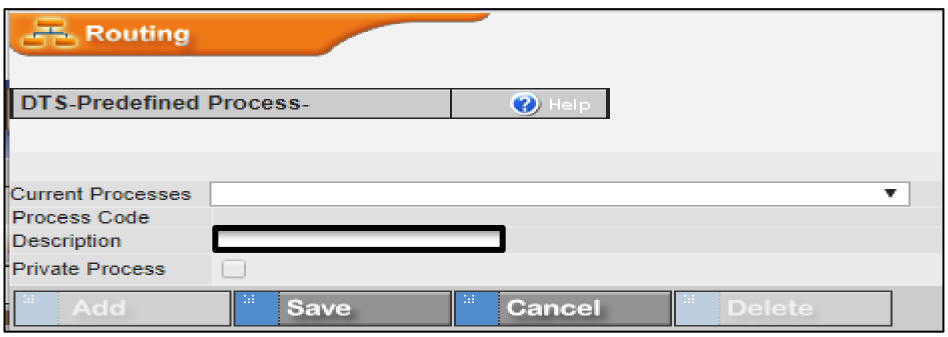
A predefined routing is a group of routings for documents that follow the same surname process and enables the DTS user to add all routings at once instead of adding them one by one, the FWS has over 1,500 predefined processes that are in use at any given time.

Creating a New Predefined Process

1. Press the Manage Predefined Process icon (three yellow arrows coming from a single point) located as the 8th icon on the Navigation Bar.



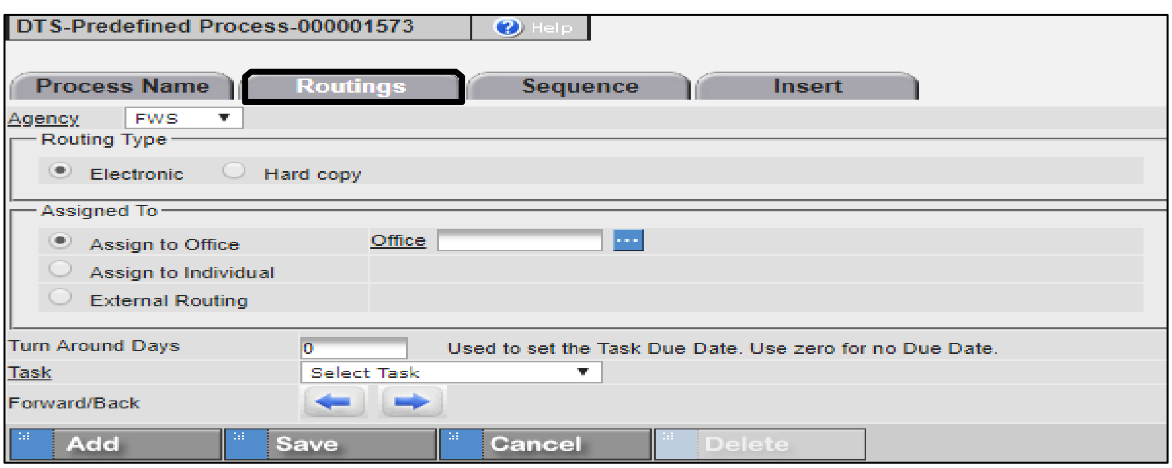
2. Type a Description (required) of your process in the Description field.



3. Click Private Process (optional) checkbox for your use only, if desired. If not, checked, everyone can use the predefined routings.

4. Click the Save icon.

5. Click on the Routings tab.



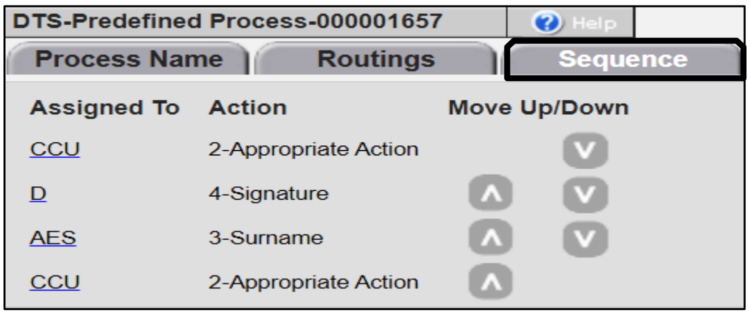
6. Select a routing type, an office, task, and the anticipated turnaround days (turnaround days is optional).

7. Click the Save icon.

8. Click the Add icon to add routings to your predefined process.

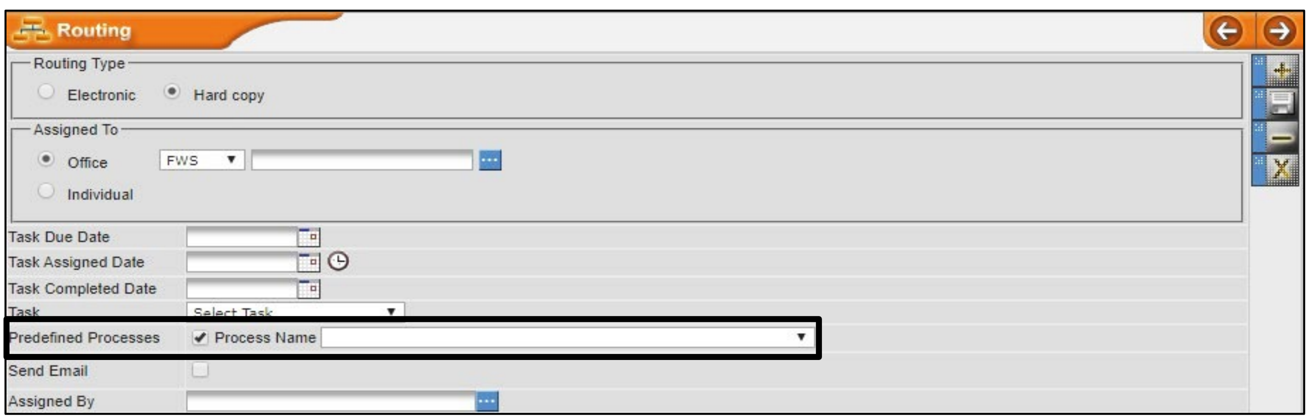
9. Repeat steps 6 through 8 for each routing in your process.

10. Press the Sequence tab to ensure your routings are in the desired order by using the move up or down arrows to move a routing office.



Adding a Predefined Process to a Record

1. Select the Add Routing button from the Tree (Orange Organization Chart icon) or click the Routings heading in the tree.



2. Select a Routing Type

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

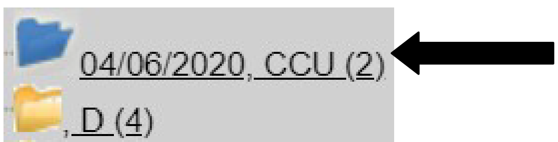
4. Check the Send Email checkbox below the Predefined Processes box.

5. Click the Save Routing (Floppy Disc) icon 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.

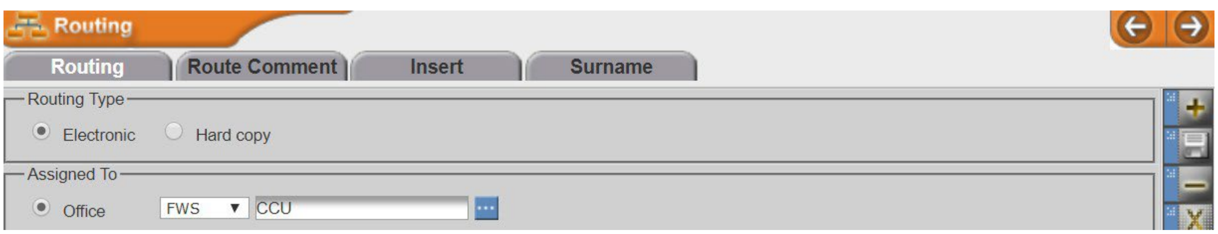
Electronic Surnaming

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.



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.



2. Click on Surname and then fill out the fields hit Save (Floppy disc icon).

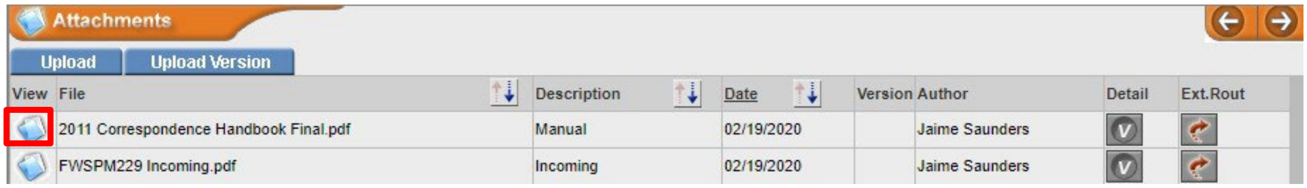
Note: if you are surnaming the document, you only have to hit the save button.

If you are surnaming for someone else, remove your name and type their name hit save. It is also recommended a comment be added when surnaming on someone's behalf with their permission.

CHAPTER 5 ATTACHMENTS

Opening An Attachment

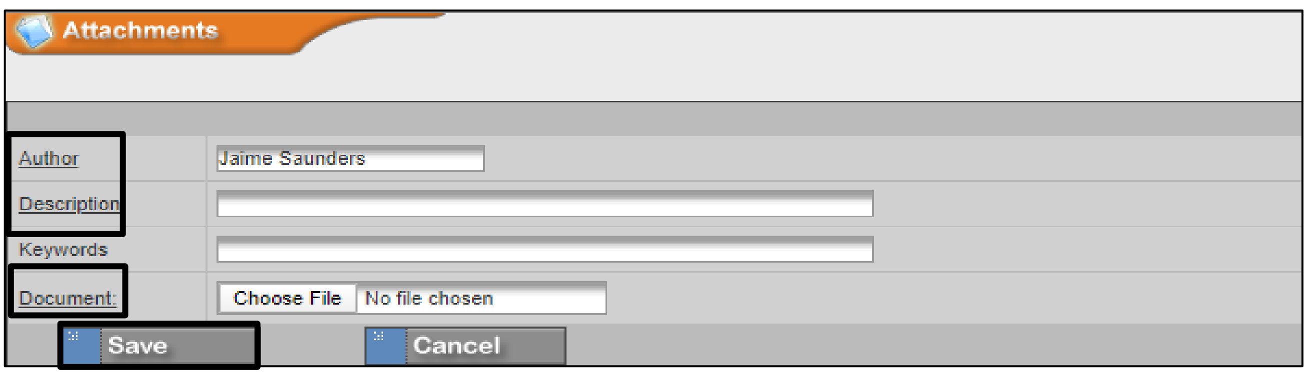
1. Click on the Attachments heading in the tree Routing Tree. The Attachments screen will display below the Core Information screen.



2. Click on the Attachment (blue paper) icon in the View Column on the left of the document you want to open.

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

Adding An Attachment



1. Click on the attachment (paper) icon.

2. Click on the Upload tab in the attachments screen.

3. Input the following information:

4. Author (required field): Type the name of author in DTS. Author doesn’t always mean that person wrote the correspondence.

5. Description (required field): Type brief description of file.

6. Key Words (optional field): Type keywords

7. Document (required field): Click on the Choose File button and locate the file

you want to attach.

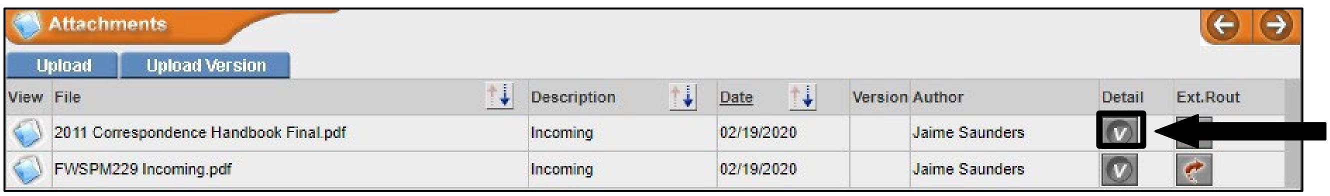
8. Press the Save button on the bottom left of the screen.

9. Click the Go Back button on Attachments on the right side of the screen.

Note: You can add as many attachments as required.

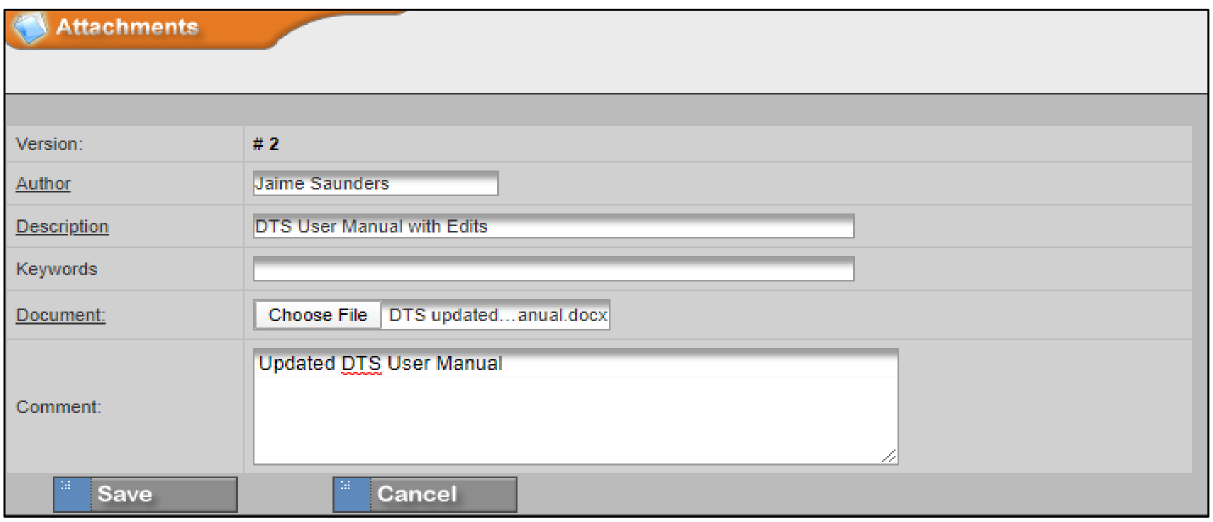
Versioning An Attachment

1. Click the Attachment button over the Routing Tree or click on the Attachment Heading in the Routing Tree.



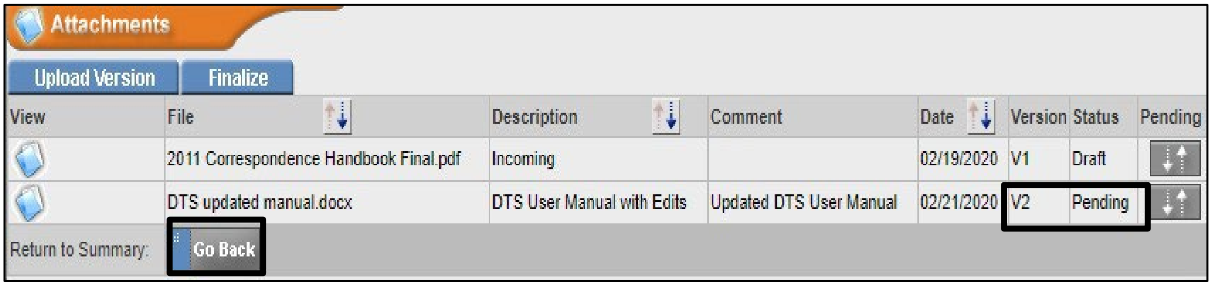
2. Click the View Versions button in the Detail column.

3. Click on the blue Upload Version tab.



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

5. Click the Go Back button.

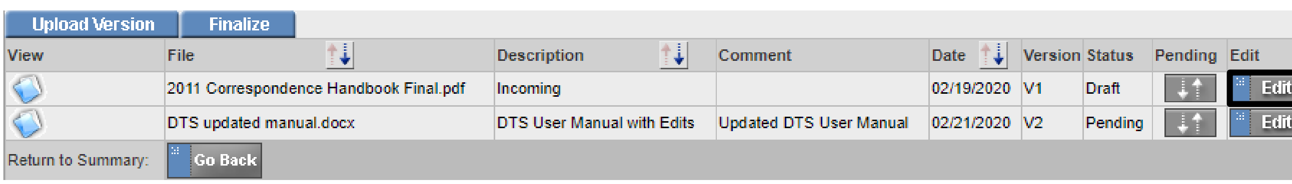


The new version automatically becomes the Pending version and shows in the Routing Tree.

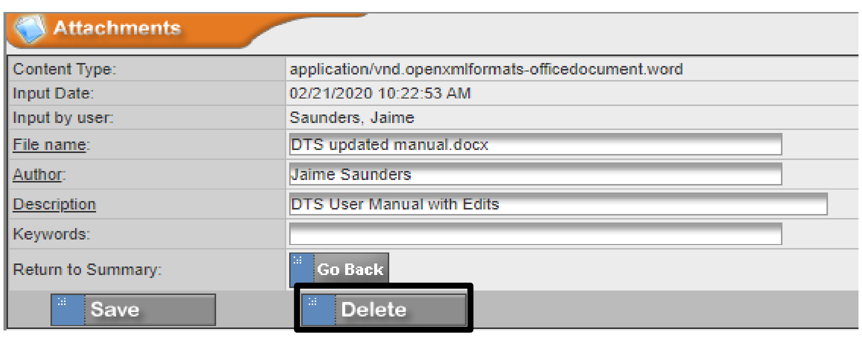
Deleting An Attachment

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

1. Click on the Attachment (paper) icon and Attachments in the Routing Tree.
2. Click the View Versions (letter V) button in the Detail column.



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



4. Click the Delete button at the bottom of the pop up. A confirmation box will pop up. Select OK or cancel.
5. Click the Go Back button.

CHAPTER 6 CONTROL SLIP

Control Slip

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.

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

2. Click the middle tab, New Control Slip, and a pop-up screen will display with Control Slip at the top, DCN, a field for including comments in the middle, and a Generate Control Slip at the bottom.

3. Click the button Generate Control Slip. Your Routing Tree will display the total of number of generated control slips.

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

Example 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:

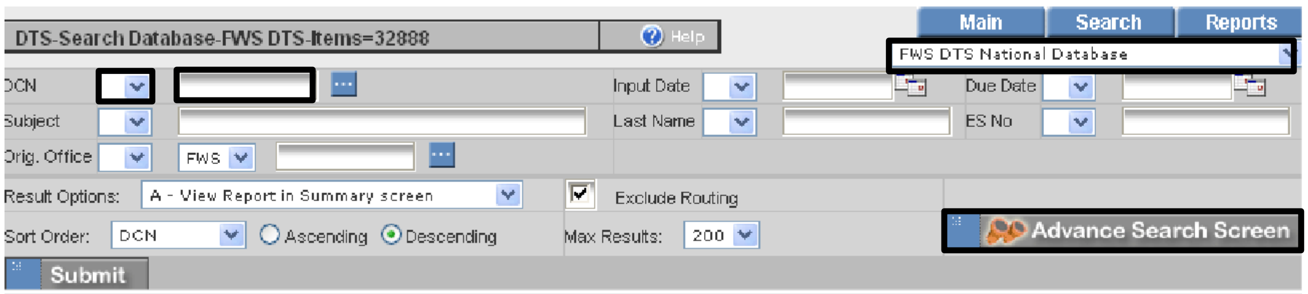
Assigned To	Task	Assigned Date	Due Date	Completed Date
CCU	2 - Appropriate Action	02/19/2020		02/19/2020
IR01	0 - Prepare Draft Response	02/25/2020		02/28/2020
D	4 - Signature	02/25/2020		02/26/2020
CCU	2 - Appropriate Action			
AES	5 - Review/Comment			

4. Click the tab View Control Slip to print out a control slip.
5. Click the print icon at the top right of the screen to print out the control slip.

CHAPTER 7 SIMPLE AND ADVANCED SEARCH

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

Simple Search



- Click on the magnifying glass icon on the Navigation Bar and the Search tab to open the Search screen.

- Select a database at the right top of the scree to search from. You can also select “All databases” to search all the databases you are authorized to view.

- Select other fields that are included in the Simple Search to scope your search.

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

Searching Operators

= Equal to the value specified.
~ Not equal to the value specified.
* Containing the value specified.

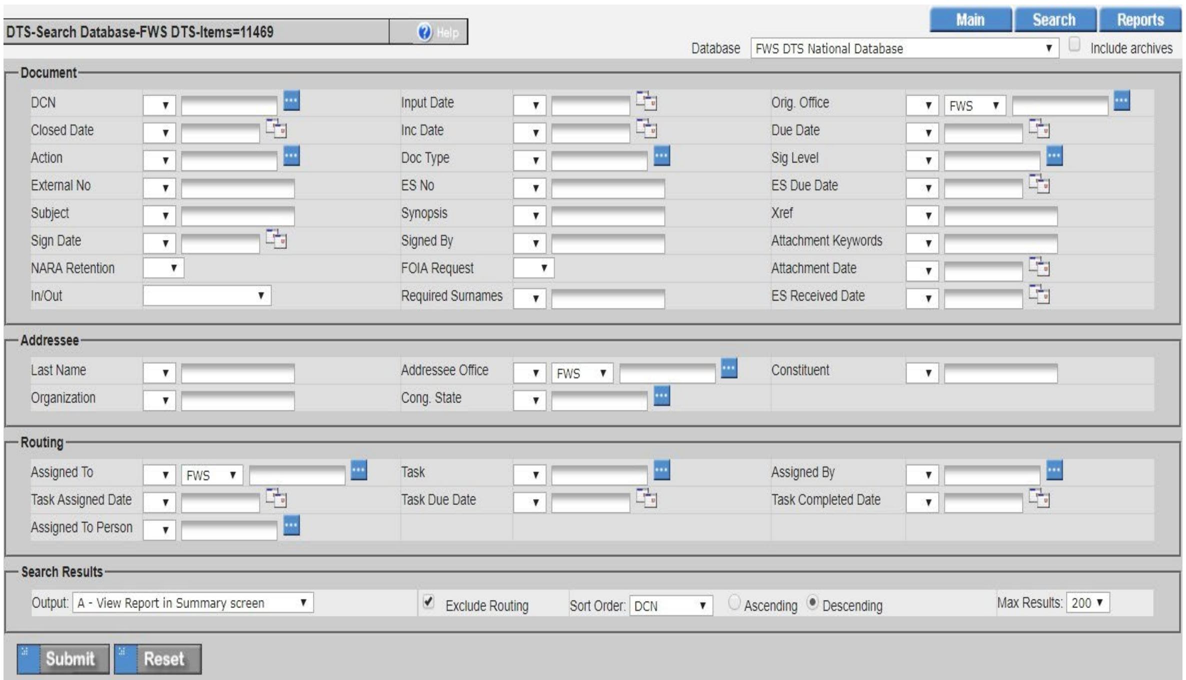
- Data Range Screen – Click the calendar Icon next to the Input Date to bring up the date range screen. Click the calendar icons to select a From Date and a To Date, then click Save.

- Results Options – Select an option to view or download a search result in a form of a report.

- Press the Submit button.

Advanced Search

To refine your search, click on the Advanced Search Screen button at the bottom right of the search screen and define your search criteria and press the Submit button.



CHAPTER 8 LOCK AND CLOSE RECORD AND WORK FLOW REPORTS

How To Lock a Record

To lock a record, click on the checkbox next to Lock Record located at the bottom of the Control Center.

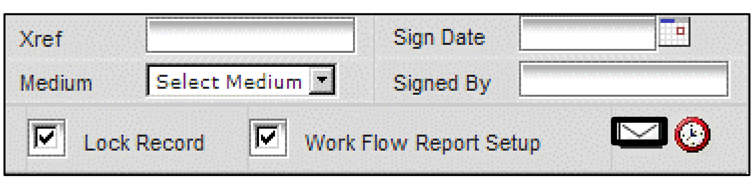
If you need to modify a record that has been locked by another user, click on the link at the top of the Routing Tree to send the user an email asking the user to unlock the record.

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.

How To Set Up a Workflow 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 any time during the process.

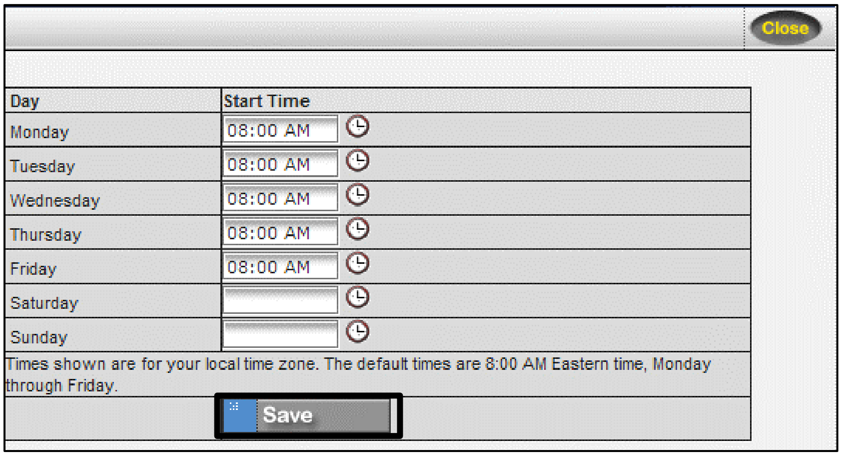
To set up a work flow report:



1. Check the box next to the Work Flow Report Setup box.

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

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

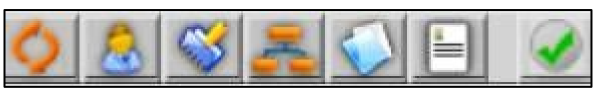


4. When you no longer wish to receive the Work Flow Report, open the record and uncheck the checkbox.

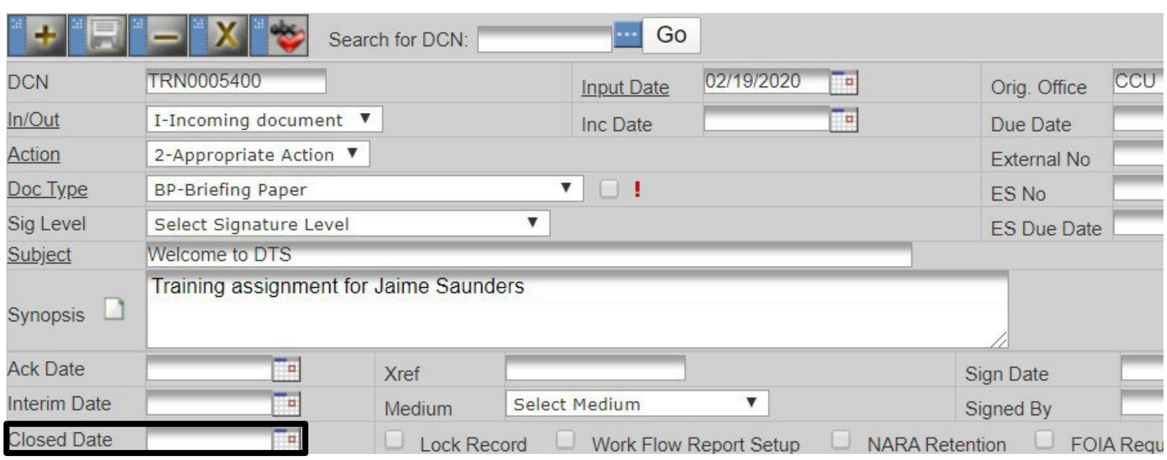
How To Close Records When Finalized

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

1. Click the Green Check Icon at the top of the Routing Tree to close all routings.



2. Press the calendar button located toward the bottom left in the Control Center and select an appropriate date in the Closed Date Field of the open record.



3. Press the Save (floppy disc) button.

CHAPTER 10 SUMMARY OF FIELD DEFINITIONS

Note: Underlined text is a required field throughout the Department.

FIELD	DEFINITIONS
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.
Input Date	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.
Inc. Date	Date on incoming letter/document. Press the calendar button to select appropriate date. Do not enter a date for an outgoing document.
Due Date	Due date for lead office is the date by which all action must be completed. Press the calendar button to select appropriate date.
Action	This is the overall action for the document; select from the dropdown list.
Doc. Type	(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.

FIELD	DEFINITIONS
Subject	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.

VERSION CONTROL LOG

Version Number	Effective Date	Revision Description	Author(s)
1.0	01/2020	Original Version.	Nikki Randolph, FWS
2.0	07/02/2024	Revised to update and make Manual Section 508 Compliant.	Nikki Randolph Christina Mathers

Tips For Maintaining A Version Control Log

Add a version control table to the back of the document that records:

- Version Number
- Effective Date
- Revision Descriptions
- Author(s)
- Optional: Approved by

When using version numbering for a document: Small edits will be reflected by an increase of x. (i.e.: 1.0 revised to 1.1) In the event of a major update, the next version will be a whole number. (i.e.: 1.3 revised to 2.0). Be sure to update your control log accordingly.

Be sure to update the Title of your document to include the version number.