NAVIGATION

- ♠ Home
- Correspondence
- Originator
- Reviewer
- Reporting
- Help

ADMINISTRATION

- Permission Settings
- Set CATS Users
- Documents Operations
- Review Operations
- Deleted Packages

## **HOME**

CATS is an automated workflow system that encourages a collaborative environment, enables the tracking of documents as they go through a comprehensive review and clearance process, and serves as a repository of correspondence and other official documents.



Correspondence Dashboard

- · Upload incoming correspondence and other documents
- · Assign office leads
- · Track the workflow for all documents
- · Access final repository for all documents

\*\*\*Only available to the Correspondence Unit and Legislative Affairs\*\*\*



Originator Dashboard

- · Access Pending Assignments (e.g., correspondence)
- · Launch new collaborations
- · Manage the clearance process



· Review, edit and sign off on assigned documents

## MOD CATS V3

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#### Reviewer Dashboard

• Review, edit and sign off on assigned documents

Filter

## **■ MOD CATS V3**

NAVIGATION ★ Home

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ADMINISTRATION

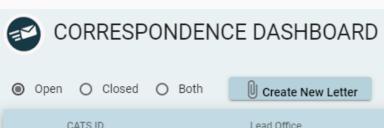
Permission Settings

Set CATS Users

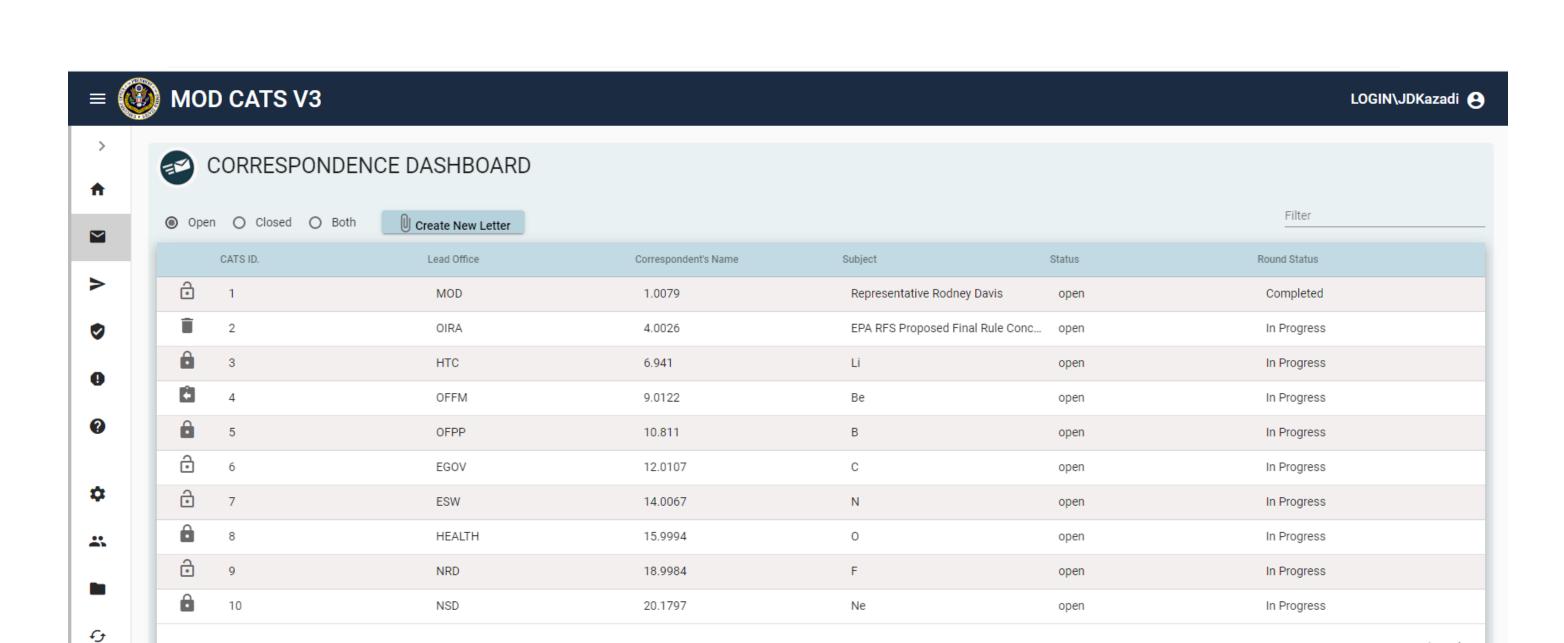
Documents Operations

f Review Operations

Deleted Packages



• Ор	en O closed O Both	U Create New Letter				-
	CATS ID.	Lead Office	Correspondent's Name	Subject	Status	Round Status
<b>a</b>	1	MOD	1.0079	Representative Rodney Davis	open	Completed
Î	2	OIRA	4.0026	EPA RFS Proposed Final Rule	open	In Progress
<b>a</b>	3	нтс	6.941	Li	open	In Progress
Ċ	4	OFFM	9.0122	Ве	open	In Progress
â	5	OFPP	10.811	В	open	In Progress
ô	6	EGOV	12.0107	С	open	In Progress
<b>a</b>	7	ESW	14.0067	N	open	In Progress
â	8	HEALTH	15.9994	0	open	In Progress
<b>a</b>	9	NRD	18.9984	F	open	In Progress
â	10	NSD	20.1797	Ne	open	In Progress
					Items per page: 10	▼ 1 - 10 of 20



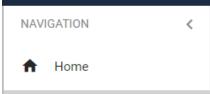
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Items per page: 10 ▼ 1 - 10 of 20

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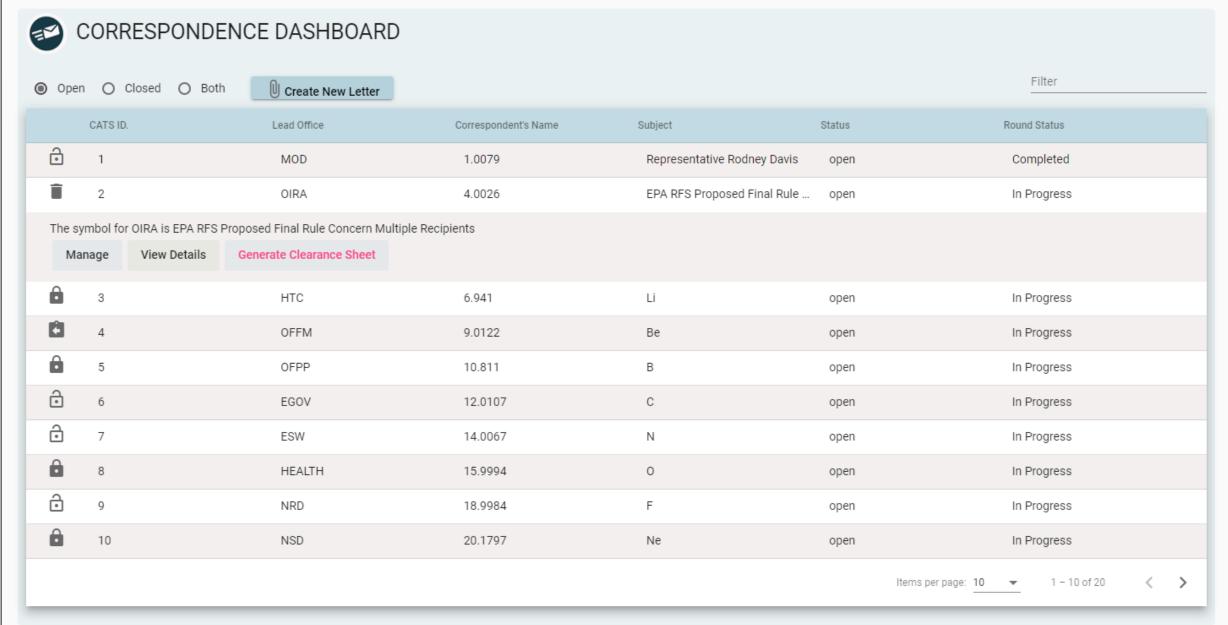




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#### ADMINISTRATION

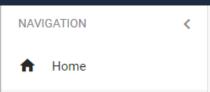
- Permission Settings
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# **■ MOD CATS V3**



Originator

Correspondence

Reviewer

Reporting

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Permission Settings

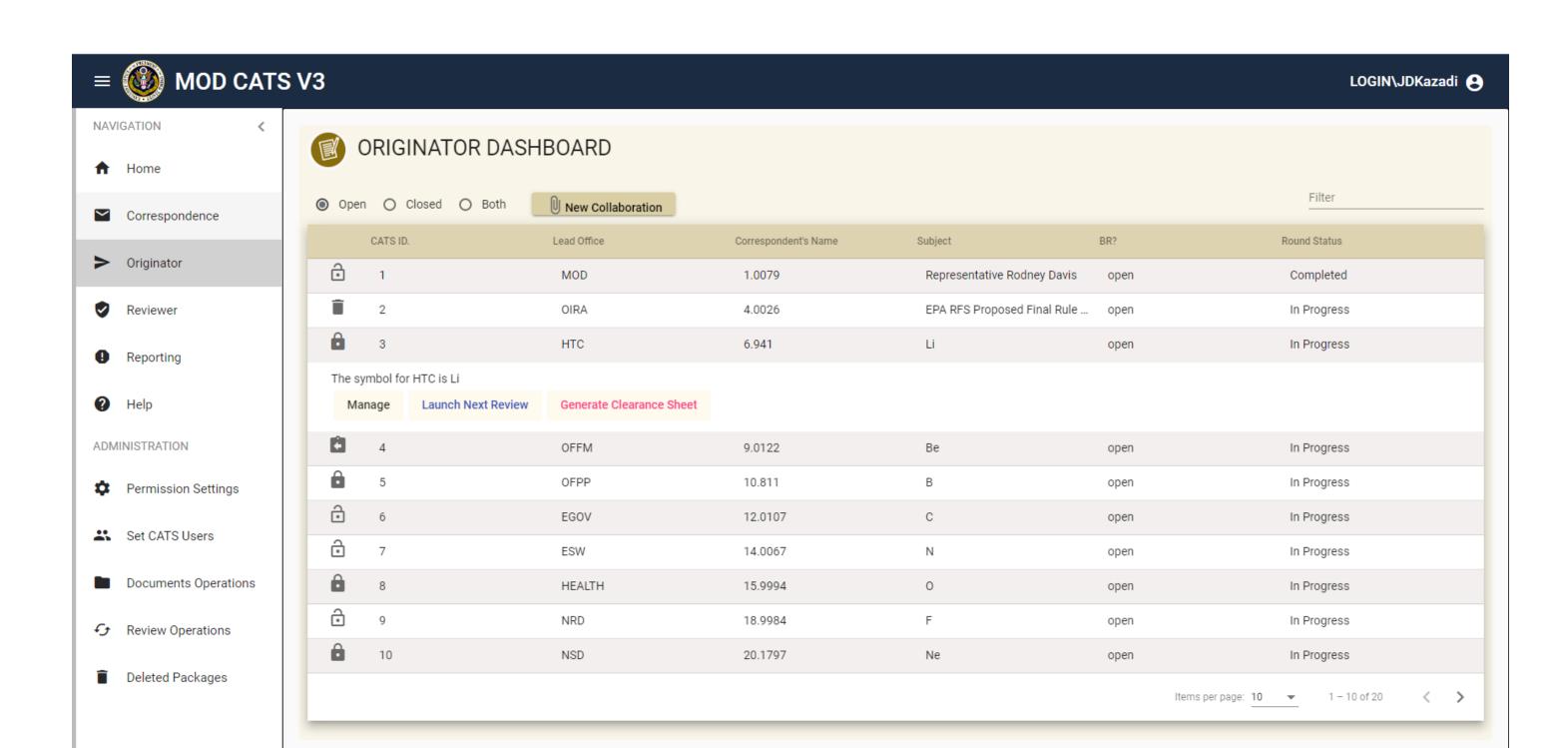
Set CATS Users

Documents Operations

Review Operations

Deleted Packages

© ORIGINATOR DASHBOARD								
Ope	en O Closed O Both	New Collaboration				Filter		
	CATS ID.	Lead Office	Correspondent's Name	Subject	BR?	Round Status		
ô	1	MOD	1.0079	Representative Rodney Davis	open	Completed		
ì	2	OIRA	4.0026	EPA RFS Proposed Final Rule	open	In Progress		
â	3	нтс	6.941	Li	open	In Progress		
Ê	4	OFFM	9.0122	Ве	open	In Progress		
ê.	5	OFPP	10.811	В	open	In Progress		
ô	6	EGOV	12.0107	С	open	In Progress		
ô	7	ESW	14.0067	N	open	In Progress		
•	8	HEALTH	15.9994	0	open	In Progress		
ô	9	NRD	18.9984	F	open	In Progress		
â	10	NSD	20.1797	Ne	open	In Progress		
					Items per page: 10	▼ 1 - 10 of 20 < >		



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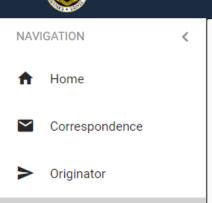
圓	REVIEWER DASHBOARD
E	

Filter

	CATS ID.	Lead Office	Correspondent's Name	Subject	BR?	Round Status
ô	1	MOD	1.0079	Representative Rodney Davis	open	Completed
	2	OIRA	4.0026	EPA RFS Proposed Final Rule	open	In Progress
	3	HTC	6.941	Li	open	In Progress
Ê	4	OFFM	9.0122	Ве	open	In Progress
	5	OFPP	10.811	В	open	In Progress
ô	6	EGOV	12.0107	С	open	In Progress
ô	7	ESW	14.0067	N	open	In Progress
	8	HEALTH	15.9994	0	open	In Progress
ô	9	NRD	18.9984	F	open	In Progress
	10	NSD	20.1797	Ne	open	In Progress
					Items per page: 10	▼ 1 - 10 of 20 <b>〈 〉</b>







Help

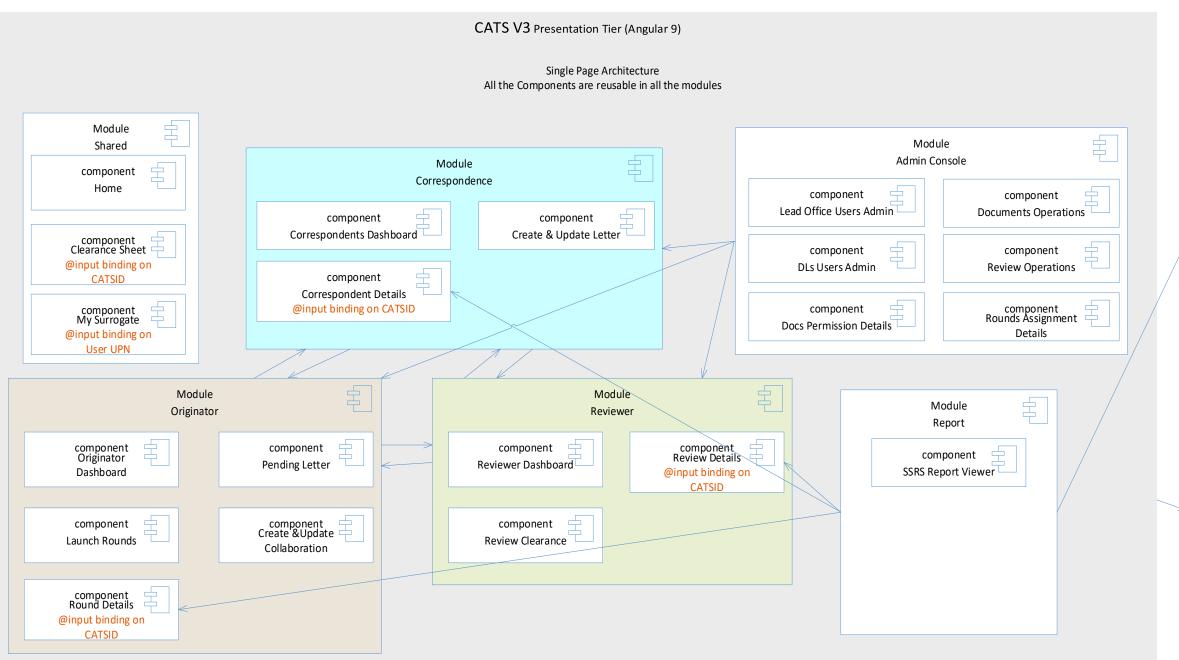
Reviewer

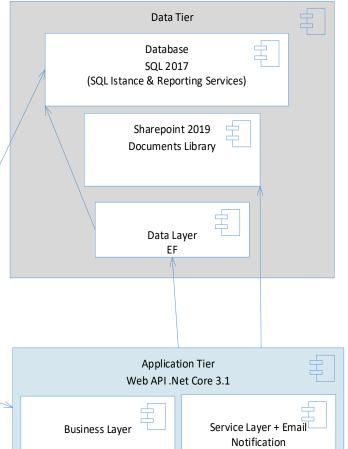
Reporting

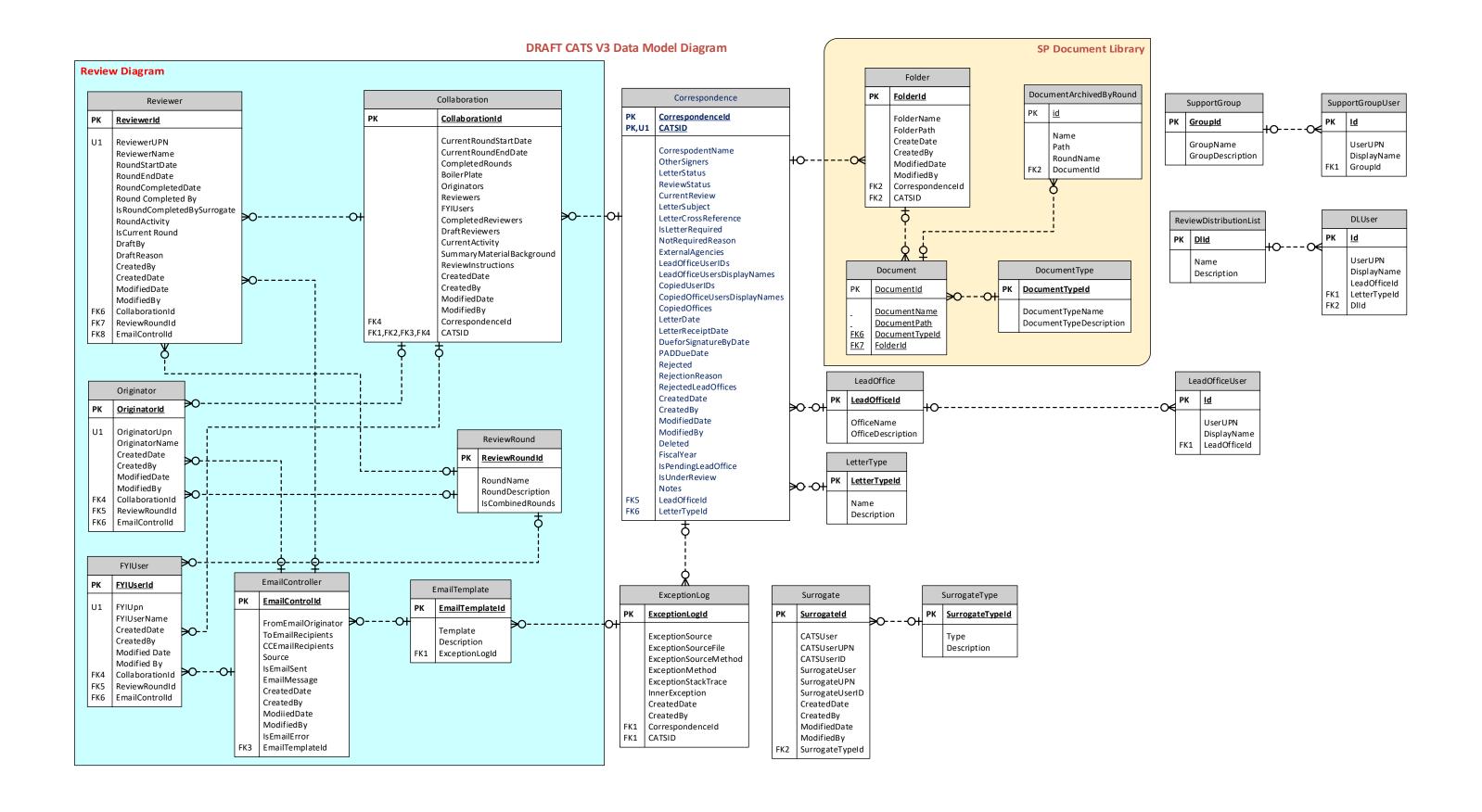
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Not Completed O Draft O Completed								
	CATS ID.		Lead Office	Correspondent's Name	Subject	BR?	Round Status	
3	1		MOD	1.0079	Representative Rodney Davis	open	Completed	
	2		OIRA	4.0026	EPA RFS Proposed Final Rule	open	In Progress	
•	3		HTC	6.941	Li	open	In Progress	
Ê	4		OFFM	9.0122	Be	open	In Progress	
•	5		OFPP	10.811	В	open	In Progress	
The symbol for OFPP is B								
V	iew Details	Mark Complete	Mark Draft	Generate Clearance Sheet				
0	6		EGOV	12.0107	С	open	In Progress	
3	7		ESW	14.0067	N	open	In Progress	
•	8		HEALTH	15.9994	0	open	In Progress	
9	9		NRD	18.9984	F	open	In Progress	
6	10		NSD	20.1797	Ne	open	In Progress	







#### **Views**

#### vwCorrespondenceAndReview

CATSID Lead Office Lead Users **Copied Offices** Copied Users CorrespondentName Letter Subject Document Type Documents

**Current Round** Item Status **Round Status** Date Received Due For Signature By Date PAD Due Date Created Date Created By Modified Date Modified By **Review Documents Reference Documents Final Documents** Is Responce Required Not Required Reason Notes Deleted

#### vwReview

CATSID Correspondent name Lead Office Document Type

Subject Is Boiler

Summary Background Review Instruction

Originators Reviewers **FYUsers** 

Surrogates Current Round **Rounds Completed Current Round Status** 

**Review Start Date** Review Due Date **Review Documents** 

**Reference Documents Final Documents** 

#### vw Collaboration And Correspodence And Review

CATSID

Lead Office

Correspondent Name

Subject

Document Type

IsBoiler

Summary Background

Instrauctions

Current Review Round

Reviewers

Originators

FYIUsers Surrogates

Draft Users

Current Review Start Date

Current Review Due Date

Completed Rounds

#### vwReview Details

Filter View v\_Review by CATSID and Lead Office

#### vwPending Collaboration

Filter View v\_Correspondence by Lead Office and IsPending Lead Office equal to True

#### vwOriginators

### vwReviewers

#### vwFYIUsers

#### vwSurrogate

**CATS User** CATS User UPN Surrogate UPN Surogate Name

#### **SSRS Report Views**

#### vw ReportCollaborationStatistcs

Count\_Open\_Items

Count Open Items In Clearance Avg\_DaysOpen\_In\_Review

Avg\_RoundsCount\_In\_Review

#### vwReportLeadOfficePerformanceMetrics

LeadOffice

TotalItems

ItemInProgressCount

ItemClosedCount

Avg\_Days\_Completed

#### vwReportLetterTypePerformanceMetrics1

LetterType

TotalItems

ItemInProgressCount

ItemClosedCount

Avg\_Days\_Completed

#### vwReportReviewRoundPerformanceMetrics1

Round

LetterType

TotalItems

ItemInProgressCount

ItemClosedCount

Avg\_Days\_Completed

#### vwReportItemsOpenTheLonguest

CATSID

LeadOffice DocumentType

DaysOpen

StartDate

#### vwReportReviewRoundStatustDetails

CATSID

CorrespondentName

Round LeadOffice

Reviewer

CreatedBy

Completed By

LetterSubject

ReviewStatus ReviewActionDate

DaysPastDue

DaysInRound

DaysInSystem

RoundStartDate

RoundEndDate

RoundsCompleted

DocumentType

#### vwReportOpenItemsStatus

CATSID

Round LeadOffice

CreatedBy CorrespondentName

LetterSubject

ReviewStatus

ReviewActionDate

DaysPastDue

DaysInRound DaysInSystem

ReviewStartDate

ReviewEndDate

RoundsCompleted

### **Admin Console Views**

vw Users By Dls Group

Dlld UserUPN

DisplayName

vwGetDocumentsByItem

CATSID
DocumentId
TypeID
TypeDescription
Path

vwDeletedItems

vwltemAssignedUsers

vwUserByLeadOfficeGroup

CATSID

LeadOfficeId

DisplayName

UserUPN

ReviewRound Reviwers Originators FYUsers

vwSPDocumentUserPermissions

CATSID
ReviweRound
EditPermissionUserList
ReadPermissionUserList
SurrogatePermissionUserList

vwSurrogateByUser

