SYSTEM DEVELOPMENT

ELECTRONIC DOCUMENT TRACKING SYSTEM
(EDTS)
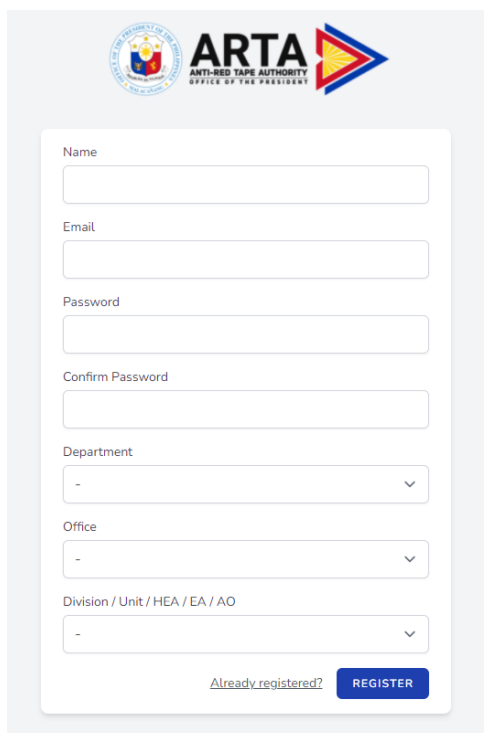
USER MANUAL
For End-Users

TABLE OF CONTENTS

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Page 2 of 13

I.   ACCESSING THE SYSTEM

1. Open a browser and enter the link http://doctracker.arta.gov.ph/.
2. Enter your email address and password (Figure 1). If you do not have an account yet, click the 'Register' button and fill out the form (Figure 2). Please wait 10-15 minutes for the Administrator to verify and activate your account. An email notification will be sent to your ARTA email account.

Figure 1: EDTS Log In

Figure 2: Registration Form

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Page **3** of **13**

II. DASHBOARD PAGE

Dashboard serves as the landing page when successfully logged in. It contains quick count of documents that are assigned to the user. Also the lists of documents created by the user (Figure 3).
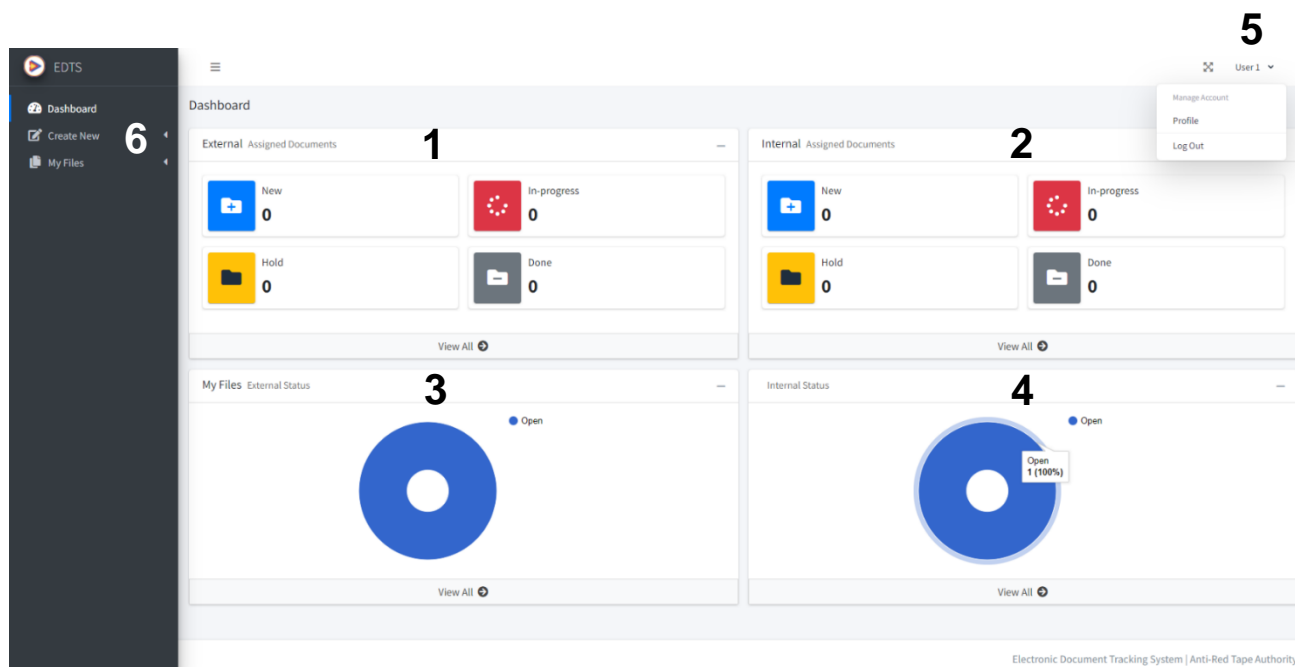

Figure 3: Dashboard Page (user role)

Components of Dashboard Page, Header and Sidebar Menu:

1. Assigned External Documents
   - Number of external documents assigned to the user.
   - Can be categorized as New, In-progress, Hold and Done.
2. Assigned Internal Documents
   - Number of internal documents assigned to the user.
   - Can be categorized as New, In-progress, Hold and Done.
3. My External Files Status (Doughnut chart)
   - Number and Status of external documents created by the user.
4. My Internal Files Status (Doughnut chart)
   - Number and Status of internal documents created by the user.
5. Manage User Account
   - 'Profile' button (Figure 4 & 5).
   - 'Log Out' button.
6. Sidebar Menu (Figure 6).

III.   MANAGE USER ACCOUNT

1. On the header menu, click username and select 'Profile' button.
2. User can update login credentials, under Profile Information and Update Password (Figure 4).
3. User can setup Two Factor Authentication, manage Browser Sessions and Permanently Delete Account (Figure 5)

Figure 4: Login Credentials

Figure 5: Manage Account

Figure 6: Sidebar Menu

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Page **5** of **13**

IV.   CREATING A NEW DOCUMENT

1. On the sidebar menu click 'Create New' and select the type of document (Figure 6).
2. Fill out the form and then press the 'Save' button (Figure 7 & 8).
3. After saving, a new document will be created and it will redirect to the list of documents created by the user (Figure 9). A document tracking system (DTS) number will be generated.

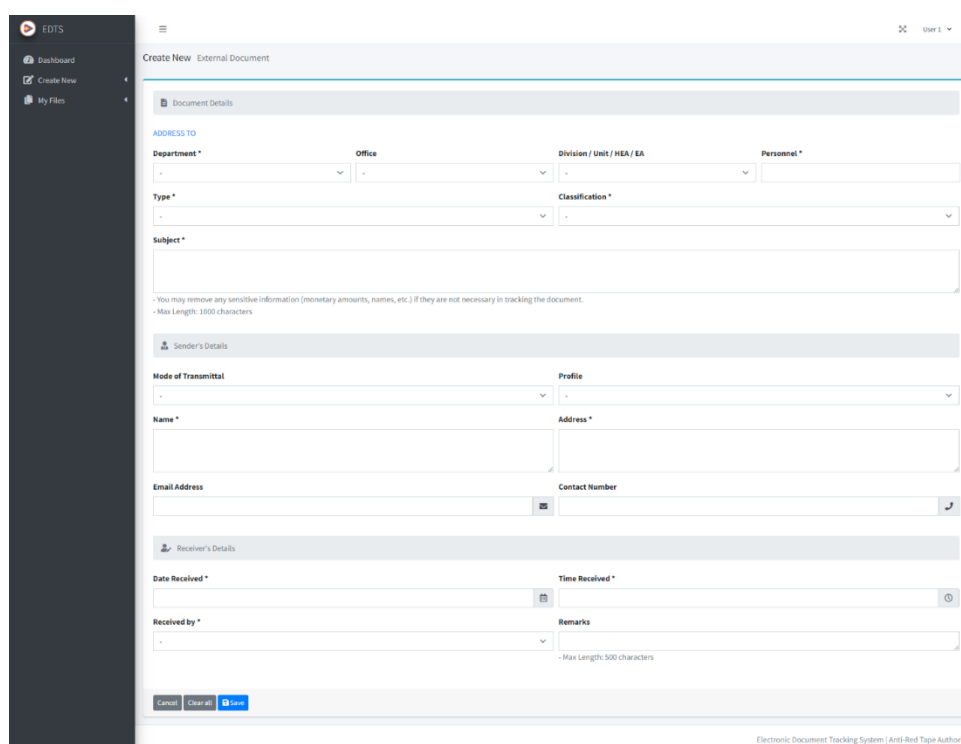**NOTE**: Document Tracking System (DTS) Number is auto generated.
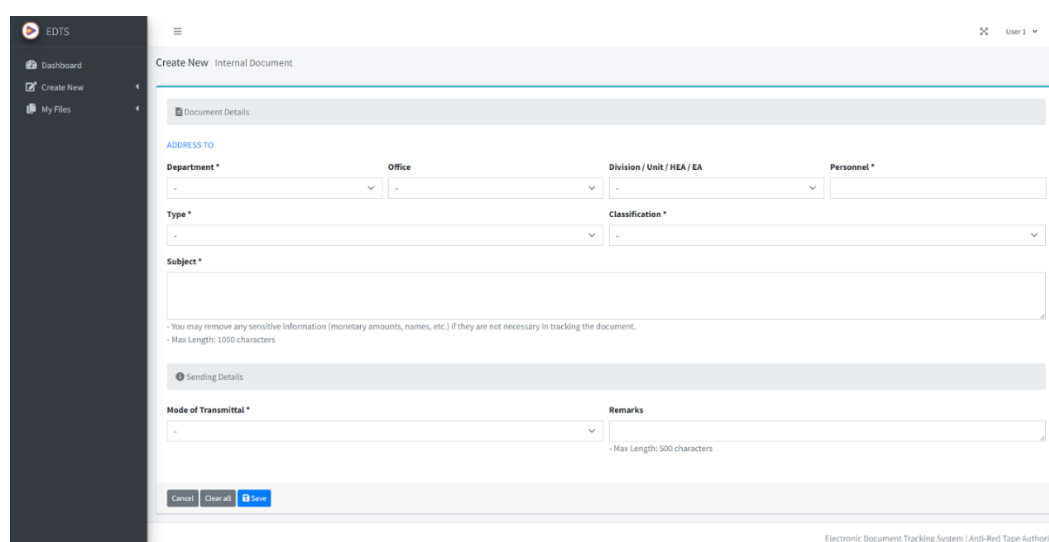

Figure 7: External Form

Figure 8: Internal Form

V. MY EXTERNAL AND INTERNAL FILES

Documents created by the user can be found in the Dashboard page or in 'My Files' menu (Figure 3 & 6). The page is in paginated format and the lists are arranged from newest to oldest (Figure 9).
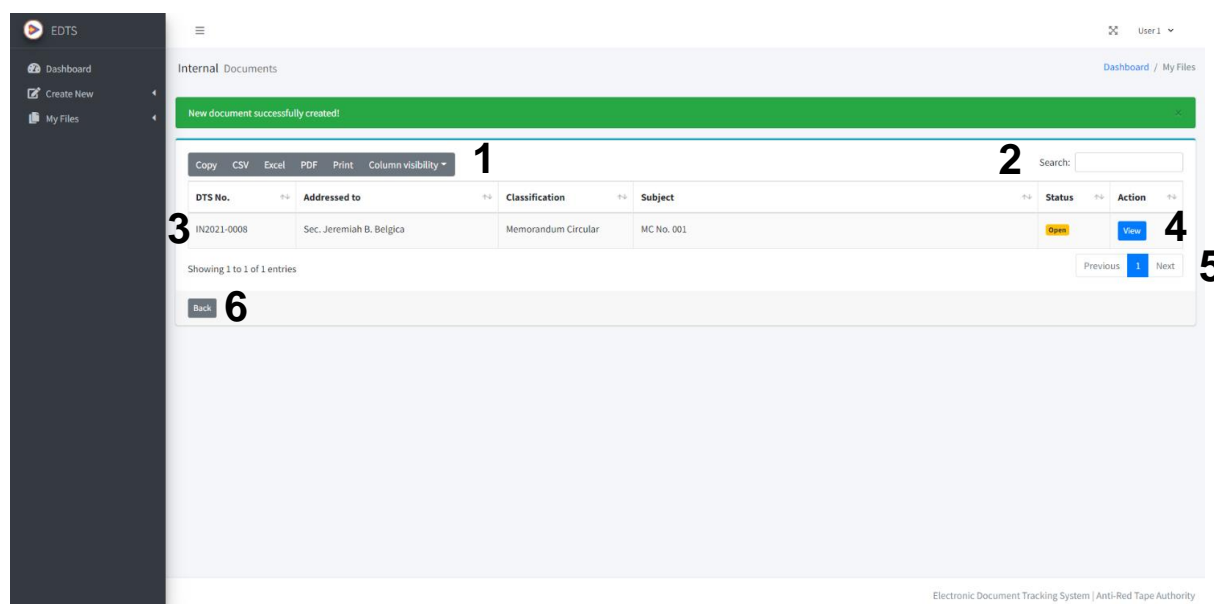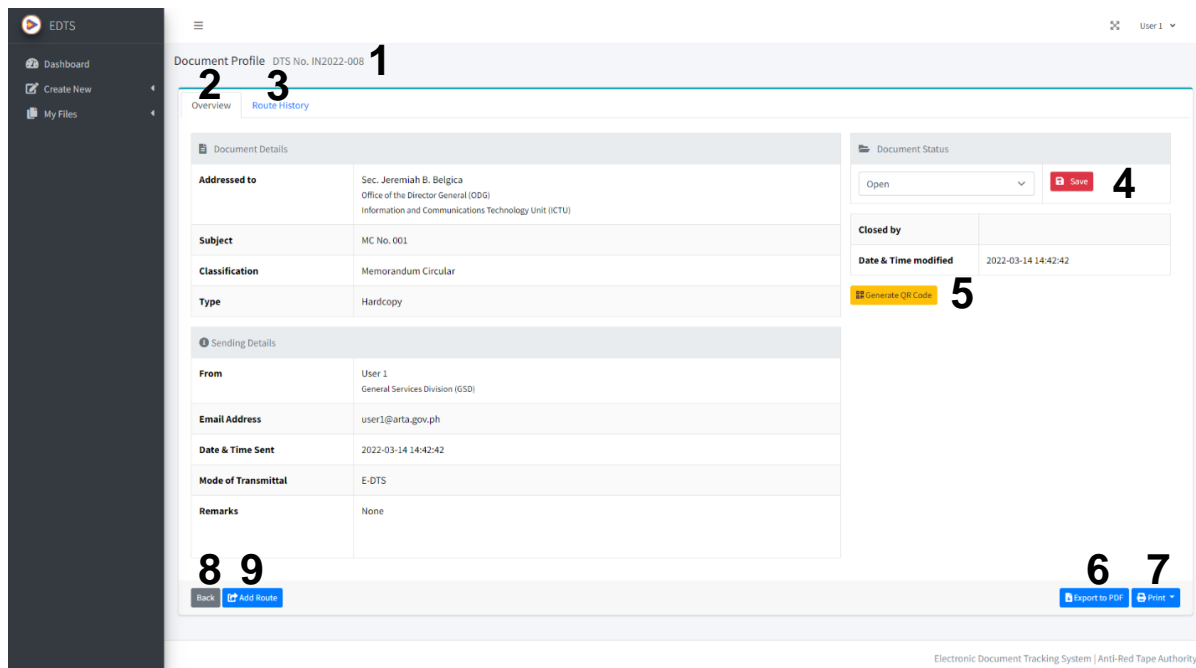

Figure 9: List of documents created by the user

Components of External and Internal Documents Page:

1. Export buttons (Copy, CSV, Excel, PDF, Print) and Column visibility
   - User can export the displayed list of documents.
   - User can filter the displayed list of documents.
2. Search Bar
   - User can search documents by DTS No., Addressed to, Classification, Subject or Status.
3. Document created
   - Document created by the user.
4. 'View' button
   - Click to view the document profile (Figure 10).
5. 'Next' or 'Previous' buttons or the page number buttons
   - Use to navigate the list.
6. 'Back' button
   - Go back to previous page.

VI.   DOCUMENT PROFILE

Figure 10: Document Profile

Components of External and Internal Documents Profile page:

1. Document Tracking System (DTS) Number
   – DTS No. is auto generated.
2. Overview Tab
   – Document details, Sender's Details and Receiver's Details for external documents.
   – Document details and Sending Details for internal documents.
3. Route History Tab
   – History of routes/assigned personnel that handles the document.
4. Document Status
   – Users can save the document as Open or Closed.
5. 'Generate QR Code' button
   – User can generate and scan QR Code to copy details on phone.
6. 'Export PDF' button
   – User can export Overview to PDF file.
7. 'Print' button
   – User can print Overview and Route History.
8. 'Back' button
   – Go back to previous page.
9. 'Add Route' button
   – User can add route and assigned the document to specific personnel or record officer.

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Page **8** of **13**

VII. ROUTING / ASSIGNING OF DOCUMENT

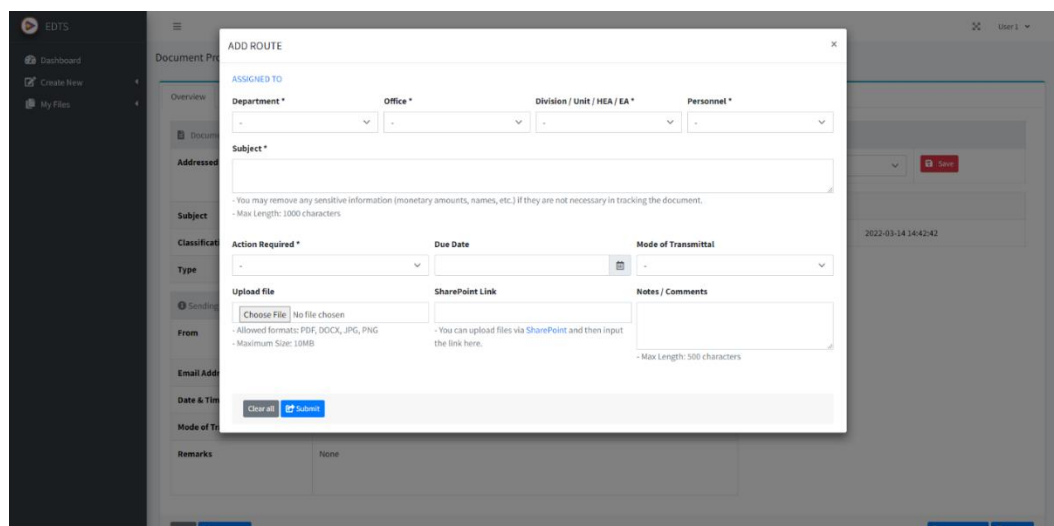The user may route/assign the document to the responsible Personnel or Record Officer.

Figure 11: Add Route

1. To route/assign the document, view the 'Document Profile' page (Figure 10).
2. Click the 'Add Route' button. The 'Add Route' form modal will appear.
3. Under the 'Assigned To' is a chained dropdown menu, user must select a Department before he/she can select the Office, Director/Division/Unit/HEA/EA/AO and Personnel or Record Officer.
4. Fill out the the rest of the form then press the 'Submit' button.
5. After submitting, user will redirected back to Document Profile.

NOTE: An email notification will be sent to the Assigned Personnel.

ASSIGNING GUIDE

Assigned To	Visibility
Department	Visible to all Personnel under the selected Department and has a role of ODG/ODDG/EA
Office	Visible to all Personnel under the selected Office and has a role of Director
Director/Division/Unit/HEA/EA/AO	Visible to all Personnel under the selected Director/Division/Unit/HEA/EA/AO and has a role of Division Chief / Unit Head
Personnel	Visible to the selected Personnel

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Page **9** of **13**

VIII. EDITING ROUTE DETAILS

User who created or assigned the document can edit the route details if the assigned personnel has not yet opened the route detail.
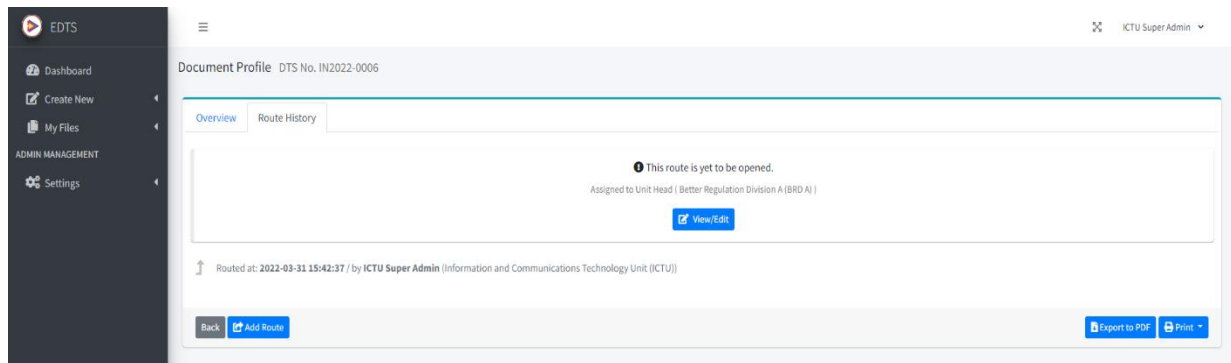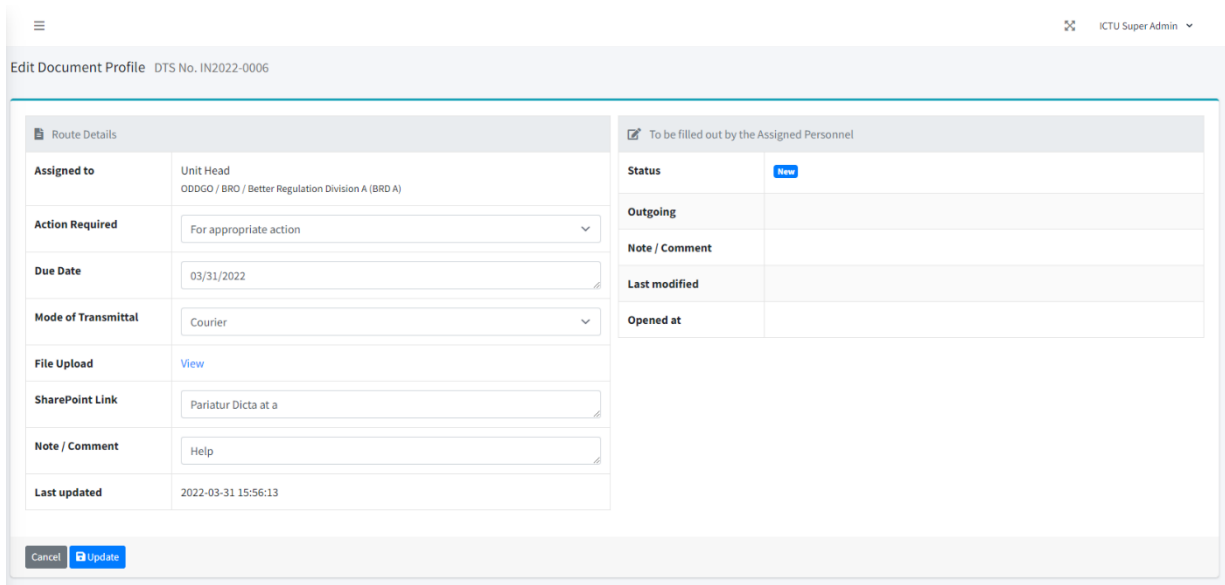

Figure 12: Route History Tab (user who routed/assigned the document view)

1. Go to 'Route History' tab and click the 'View/Edit' button (Figure 12).
2. User/creator will redirect to Edit Document Profile page (Figure 13).

Figure 13: Edit Route Details Page

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Page **10** of **13**

IX. ASSIGNED EXTERNAL AND INTERNAL DOCUMENTS

All assigned/forwarded documents can be found in the Dashboard page (Figure 3). User can select New, In-progress, Hold, Done or View All documents. The page is in paginated format and the lists are arranged from newest to oldest (Figure 14).
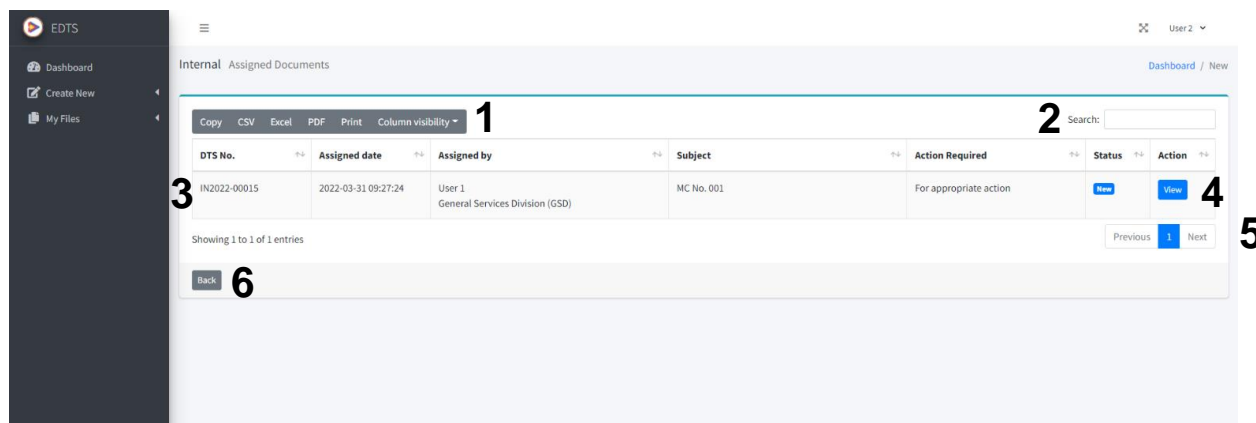

Figure 14: Assigned Documents

1. On the Dashboard page (Figure 3), select if the document is New, In-progress, Hold or Done. User can also select 'View All' to see all assigned documents.
2. User will redirected to the Assigned Documents page.
3. Search the document you want to open and click the 'View' button and the user will redirect to the Document Profile (Figure 10).
4. Go to 'Route History' tab and click the 'Open' button (Figure 15).

Components of Assigned External and Internal Documents Page:

1. Export buttons (Copy, CSV, Excel, PDF, Print) and Column visibility
   - User can export the displayed list of documents.
   - User can filter the displayed list of documents.
2. Search Bar
   - User can search documents by DTS No., Addressed to, Classification, Subject or Status.
3. Document created
   - Document created by the user.
4. 'View' button
   - Click to view the document profile (Figure 10).
5. 'Next' or 'Previous' buttons or the page number buttons
   - Use to navigate the list.
6. 'Back' button
   - Go back to previous page.

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Page **11** of **13**
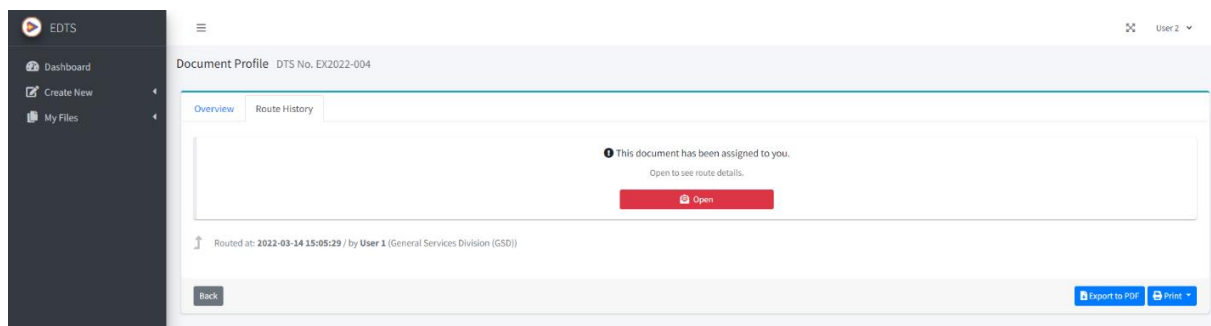
X. ROUTE DETAILS

Figure 15: Route History page (routed/assigned personnel view)

1. Click the 'Open' button.
2. Route Details and the form for the assigned personnel will be displayed.
3. Fill out the form and then click 'Update'.
4. If the status is Done, assigned personnel can now add route/assigned the document to other personnel or can also closed the document (Figure 17).
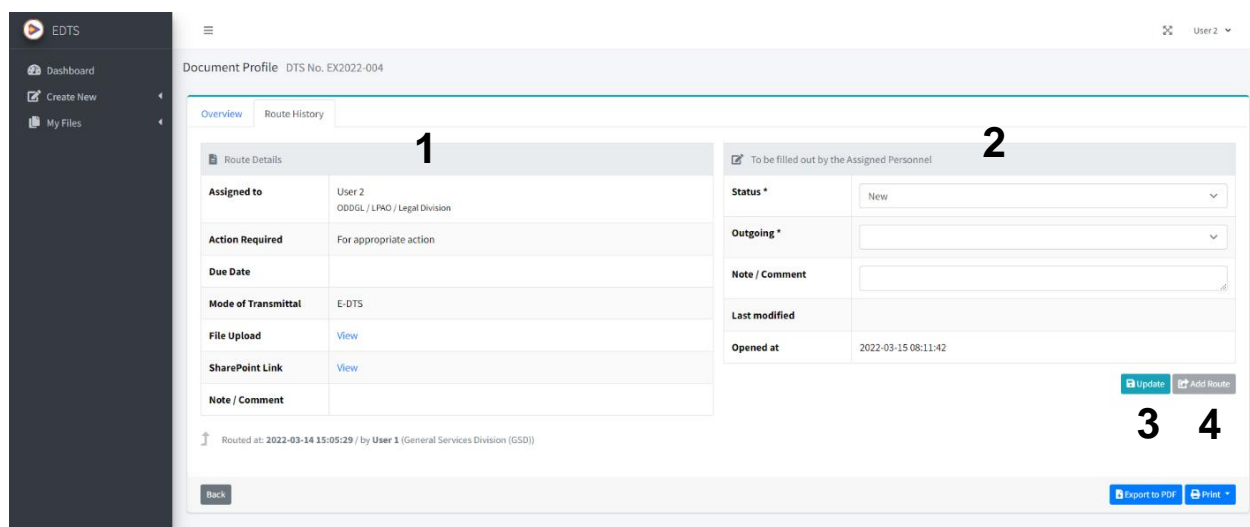

Figure 16: Route details and form for the assigned personnel

Components of External and Internal Documents Page:

1. Route Details
   - Details of the action required for the assigned personnel.
2. Form to be filled out by the assigned personnel
   - Status of the assigned document or task
3. 'Update' button
   - Fill out the form and then update.
4. 'Add Route' button
   - After updating status to Done, assigned personnel can now add route/assigned the document to other personnel or record officer.

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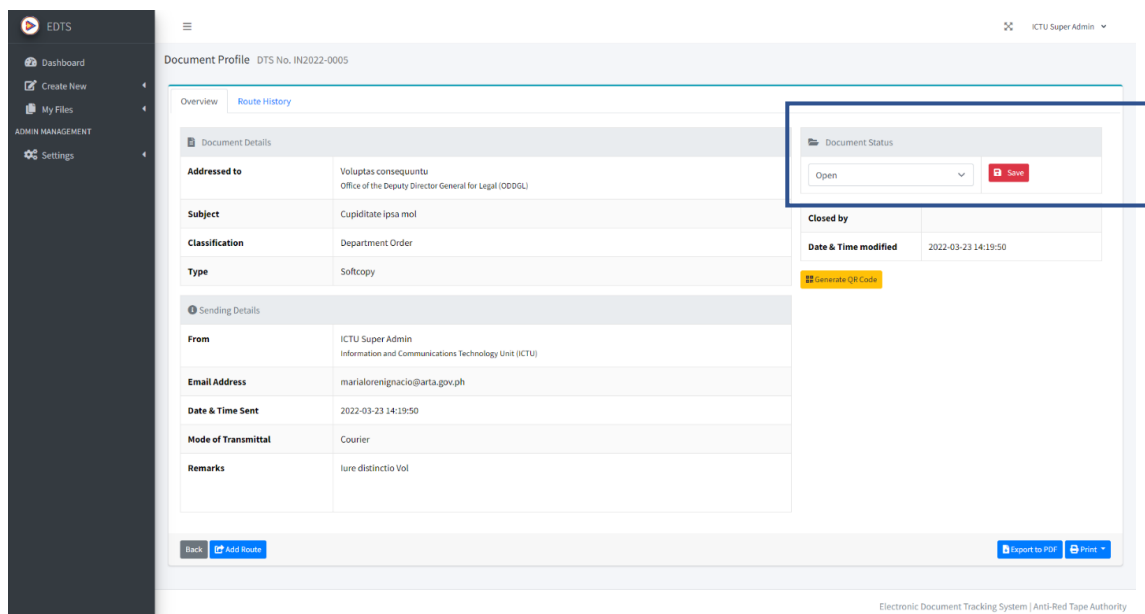Page **12** of **13**

XI.   CLOSING THE DOCUMENT

Figure 17: Document Status

1. To close the Document, go to Document Profile page (Figure 10). Select 'Close' at the Document status dropdown menu (Figure 17), then press the 'Save' button.

XII.   LOGGING OUT

1. On the header menu, click username and select 'Log Out' button (Figure 3).

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Page **13** of **13**