	DEPARTMENT OF SCIENCE AND TECHNOLOGY DOST Regional Office No. IX	DOCUMENT CODE	WI-ORD- 05-01
	WORK INSTRUCTIONS	REVISION NUMBER	2
		PAGE NUMBER	1 of 4
SECTION	PRODUCT REALIZATION	EFFECTIVITY DATE	01 July 2023
SUBJECT	HOW TO ACCESS DOST IX TRACKING RETRIEVAL, ARCHIVING OF COMMUNICATIONS FOR EFFICIENCY (TRACE)		

PERSON RESPONSIBLE:

Secretary, ORD

EQUIPMENT AND MATERIALS NEEDED:

Any PC Units Connected within DOST IX Local Area Network or Internet DOST IX *Tracking, Archiving of Communications for Efficiency (TRACE)* Network Printer


STEPS:

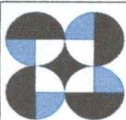
ACCESSING THE ONLINE *Tracking, Archiving of Communications for Efficiency (TRACE)*

Access the system by typing <http://trace.dost9.ph> on the address field of your internet browser window.

RECORDING INCOMING DOCUMENT

1. Open the Incoming Document module by entering the username and password. Click login.
2. Click on the Incoming Documents command button under the Documents label on the left panel.
3. Click add Incoming Document and fill out the required data fields.
4. Enter the subject. For example, How to Access DOST-IX Tracking, Retrieval, Archiving of Communications for Efficiency.
5. Select from the drop-down menu for the appropriate Document Type.
6. Click Choose Files button for the File Attachment #1 for adding an attachment.
7. Click Choose Files button again in the File Attachment #2 for an additional attachment.
8. Select the date stated on the communication on the Document Date data field.
9. Select the date of entry into the TRACE on the Date Received data field.
10. Enter the name of the person who sent the letter on the Sender's Name data field.
11. Enter the name of the department/agency/office to which the sender belongs to in the Department/Agency data field.
12. Enter the keywords relative to the content of the communication.
13. Click on the Save button to save the incoming document record.
14. *To edit: Click on the Edit (Yellow) button on the right side panel of the applicable recorded Incoming Document.*
15. Click on the Add Incoming Document button besides the Incoming Documents label on the left panel to record another incoming document and repeat steps 4-13.

Prepared by:  Secretary, ORD	Approved by:  Quality Management Representative
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UPDATING INCOMING DOCUMENT

Updating of the corresponding documents received by each personnel is very important. This helps in tracking for a specific action/s being taken or applied to a certain request/activity.

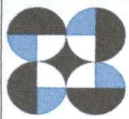
1. *To Update:* Open the Incoming Document module *and login using the Regional Director's username and password.*
2. Click on the notification command button beside the regional director's profile label on the right panel.
3. Click on the Unrouted Documents command button.
4. Click on the Route button to open the record.
5. Enter the name of the concerned personnel on the Route To data field and click on routed personnel.
6. *Select and tick the box/es of the appropriate action/s needed from the enumerated options in the Actions Needed data field.*
7. *Tick the Yes circle on the Track Document panel if there's a need for action, otherwise tick the No circle.*
8. Enter the notations instructed by the Regional Director *in* the Remarks data field.
9. Click on the Save button to save the changes.
10. Repeat steps 3-9 to edit/update another incoming document record.

SEARCHING FOR AN INCOMING DOCUMENT WITH KEYWORDS OR SUBJECT



1. *Select and* open Incoming Document command button under the Documents label on the left panel.
2. Enter *the ORD Code*, keywords or subject in the Search Document entry field and click on the Search button.
3. Click on the appropriate View button to see the document details of the *searched* recorded incoming document.
4. Repeat steps 1-3 to open another incoming document using *ORD Code*, keywords or subject entries.

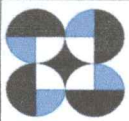
RECORDING OUTGOING DOCUMENT

1. Open the Outgoing Document module by clicking on the Outgoing Documents command button under the Documents label on the left panel.
2. Click Add Outgoing Document and fill out the required data fields.
3. Enter the subject of the communication.
4. Select from the drop-down menu for the appropriate Document Type.

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5. Click Choose Files button for the File Attachments for Adding an attachment.
6. Select the date stated on the communication on the Document Date data field.
7. Select the date on the Date Sent data field.
8. Enter the name of the addressee stated on the letter/*memorandum* on the Addressee's Name data field.
9. Enter the name of the department/agency/office/*unit* to which the addressee is connected with on the Company data field.
10. Enter the keywords on the Keywords data field.
11. *Select the name of the concerned personnel to whom the document should be routed to or should be tagged with on the Route To data field under the Routing Details panel.*
12. Enter the remarks/comments on the Remarks data field *if there are any*.
13. Click on the *Save button* to save the outgoing document.
14. Repeat steps 2-13.

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UPDATING OUTGOING DOCUMENT

1. Open the Outgoing Document module by clicking on the Outgoing Documents command button under the Documents label on the left panel.
2. Enter the *ORD Code*, keywords or subject on the entry field and click on the Search button.
3. Click on the View button to open the record.
4. Make the necessary changes by editing the data fields.
5. Click on the Save button to save the changes to the outgoing document record.
6. Repeat steps 1-5 to edit/update another outgoing document record.

SEARCHING FOR AN OUTGOING DOCUMENT WITH KEYWORDS OR SUBJECT

1. Open the Outgoing Document Module by clicking on the Outgoing Document command button under the Documents label.
2. Enter the *ORD Code*, keywords or subject in the entry field and click on the Search button.
3. Click on the appropriate View button to see the document details of the *searched* outgoing document.
4. Repeat steps 1-3 to open another outgoing document using date entries.

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