# Tracking, Retrieval, Archiving of Communications for Efficiency (TRACE) User Manual

# I. USER GROUP (UG) ACCESS

- In the TRACE system, there are four (4) user groups, and each has its own additional/unique function:
  1. Regional Director
     - This UG should belong to **ONE ACCOUNT ONLY**
     - Can view all incoming, pending, and outgoing documents of the whole agency
     - Can create an outgoing document
     - Can add his own schedule
     - Approves meetings scheduled by other staff
     - Can create and view all events; can edit his own created event
     - Can view the statistics of the whole organization
     - Can create and view company details; can edit his own created company detail
     - Can view all groups and user accounts

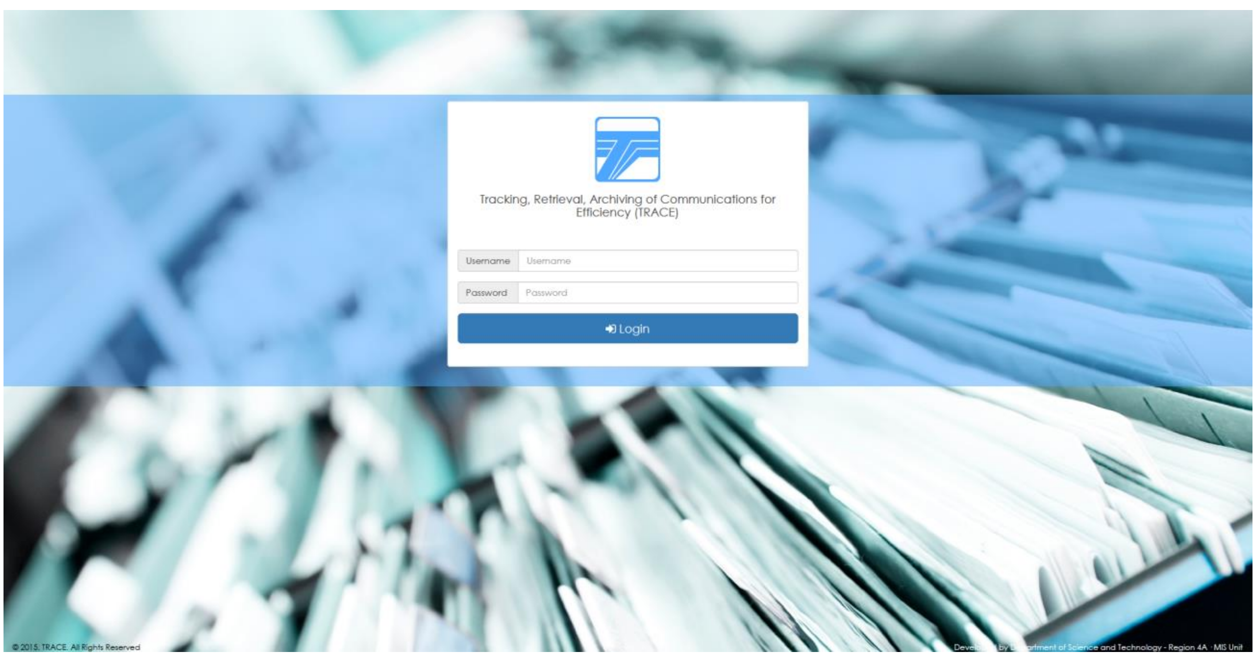
  2. Division Head / Unit Chief
     - Serves as the focal person for a unit/department
     - Can only view the incoming, outgoing and pending documents tagged in his/her account
     - Can create an outgoing document; can edit his/her own created outgoing document
     - Can schedule a meeting with the RD, can postpone/re-schedule a meeting with the RD as long as he/she was the one who requested it
     - Can create and view all events; can edit his/her own created event
     - Can view all company details; can add and edit his/her own created company details
     - Can view all groups and user accounts

  3. Document Controller
     - This UG is responsible for adding the Incoming Documents
     - This is the **ONLY** user group account that can add an incoming document
     - Can view all incoming, pending, and outgoing documents for the whole organization
     - Has a separate list of documents routed to his/her account
     - Can create and view all outgoing documents; can edit his/her own created outgoing document
     - Can schedule a meeting with the RD; can postpone/re-schedule a meeting with the RD as long as he/she was the one who requested it
     - Can view all events; can add and edit his/her own created event
     - Can view all company details; can add and edit his/her own company details
     - Can view all groups and user accounts

4. Ordinary User
    - Can ONLY see the incoming, pending and outgoing documents that was tagged in his/her own account
    - Can create outgoing documents and edit his/her own created document
    - Can schedule a meeting with the RD; can postpone/re-schedule a meeting with the RD as long as he/she was the one who requested it
    - Can create and edit his/her own created event; can view all events
    - Can add and edit his/her own created company details; can view all company details
    - Can view all groups and user accounts

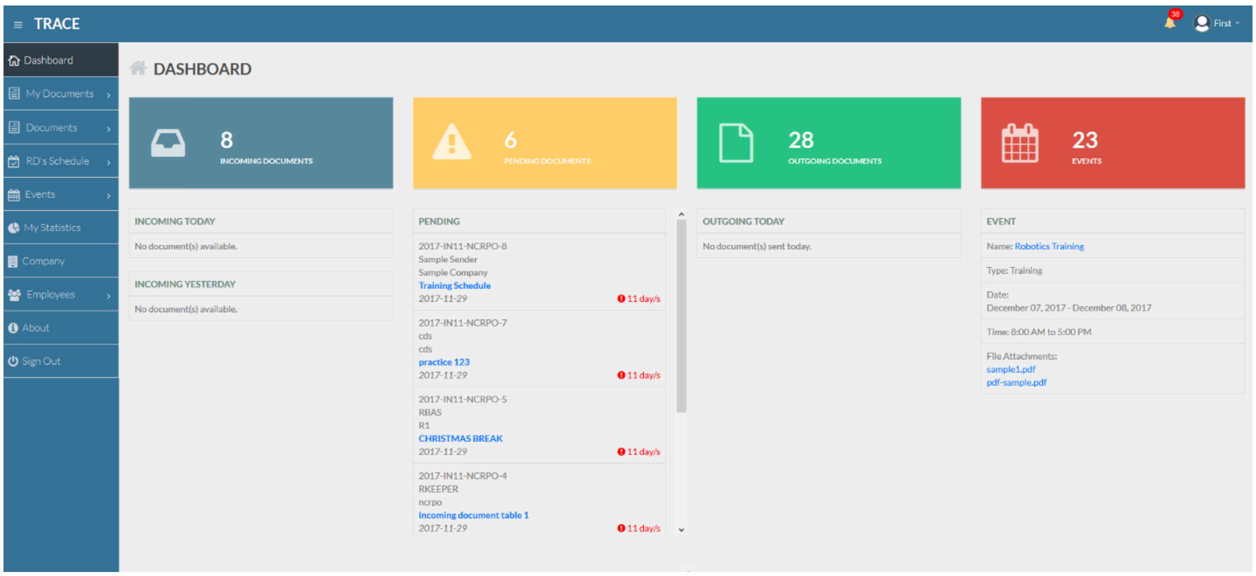
## II. LOGIN PAGE

- To proceed to the login page, the user must open his/her browser (either Google Chrome or Mozilla Firefox) and type this in URL address: ***[server IP address]*/trace.** Type in your credentials to access the system. Kindly ask your ICT unit on the URL of the TRACE system. Also, please get your user accounts from the administrators (any staff from the ICT unit of your organization). **Note for ICT Unit (Administrators): For now, kindly have this credential (admin, 12345678). Upon logging in, kindly add the respective groups/units first, before creating user accounts. Do not forget to change the password of the "admin" account.*



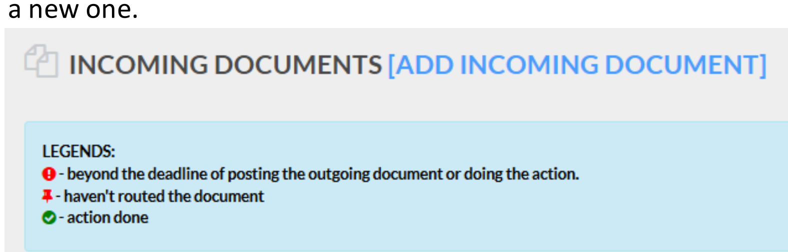
## III. DASHBOARD PAGE

- If a user has successfully logged in, he/she will be redirected to the dashboard page of the system. Whatever is seen in a user's dashboard and archive might not necessarily be the same with the other accounts. It depends on whatever document, event or meeting the user was tagged in. The dashboard page displays the total count of Incoming (which also displays the incoming for the day and previous day), Pending, and Outgoing Documents (displays all outgoing documents for the day) a user was tagged in. The total count of Events, as well as the display of details for the latest event can be seen in the dashboard. Only the Regional Director, Chief Directorial Staff, and Document Controller has a complete control count of the archives.




## IV. INCOMING DOCUMENTS

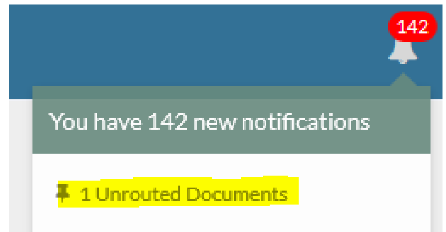
- Adding an Incoming Document – this can only be done by the Document Controller (DC) account. To add an incoming document, the DC can just click the "Documents" on the sidebar, then click the "Incoming Documents" menu tab. The DC will then be redirected to the Incoming Documents index page. Click on the **[Add Incoming Document]** link to add a new one.

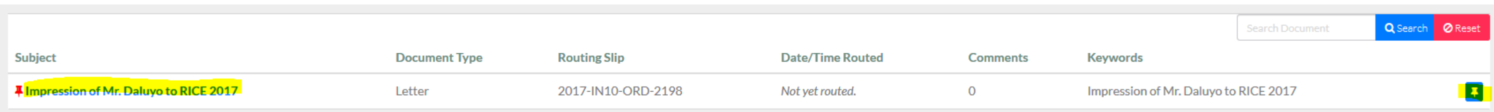



- Adding An Incoming Document – the DC just needs to fill in the following "Attachment Details", which are **ALL REQUIRED** to be filled up. As long as a textbox field has a red highlight, it means it needs to be re-inputted or needs an input. After filling up the

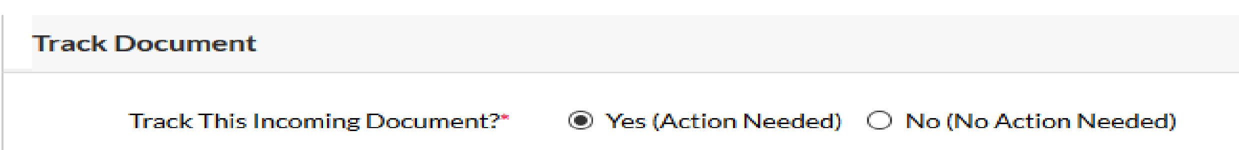
Attachment Details portion, the DC can now save the record by clicking the "Save" blue button on the bottom part of the page.

- Routing of Incoming Documents – Once the DC has added a new incoming document, the RD will be notified to his/her account. It can be seen in the notification bell in the upper-right part of the page. Upon clicking the "# Unrouted Documents" tab, the RD will be redirected to the list of Unrouted Documents. To route a document, kindly click on the Subject Title or the blue pin button on the right-most part of the table.



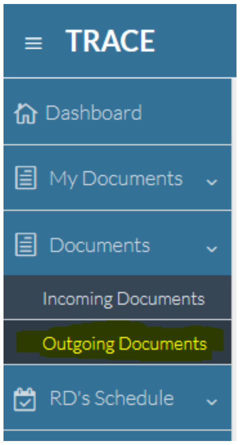

- Routing of Incoming Documents – Upon opening the document, the RD can now view the attachment details which was previously inputted by the DC. The "Routing Details" portion will be the part wherein the RD will assign to whom the document will be forwarded. The following are the parts under the 'Routing Details' portion:
    - Routed Thru – This displays the list of the assigned unit/division heads
    - Route Mode – there are three type of route mode:
        - Individual – if this is selected, the user needs to select the name of the person under the 'Route To' mode. All the names of the employees are listed under this textbox
        - Group – if this is selected, the user needs to select a group/unit under the 'Route To' mode. All the names of the groups and units recorded are listed under the textbox
        - Tag All Employees – if this is selected, once the record is saved, it will automatically notify all active employees of the organization
    - Route To – this displays the names of all active employees/groups
    - Actions Needed – you may check more than one action, if necessary. These are the actions reflected on your routing slip
- Track Document – this portion will determine if a document will be under a pending one or not. If a certain document **NEEDS AN ACTION, YES SHOULD BE SELECTED.** If **NO ACTION IS NEEDED, or if the document is just for filing, reference, etc, NO SHOULD BE SELECTED.** The 'Remarks' portion is for additional instructions and/or information regarding the record.

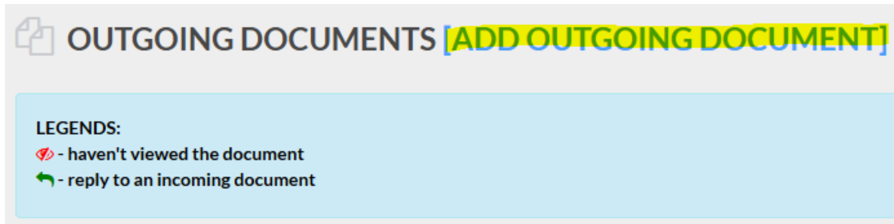



- After the RD designates the task, selects the status of tracking, and inputted additional instructions/remarks, on the bottom part of the page, just click on the "Save" button to route the incoming document, and notify the tagged employee/s.

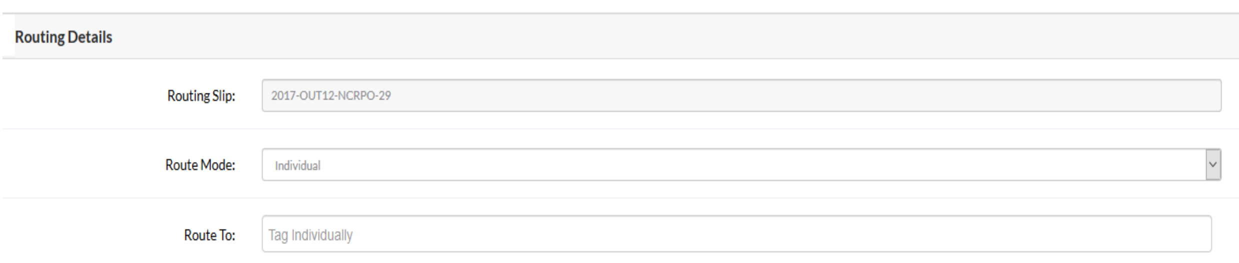
## V. OUTGOING DOCUMENTS

- Adding an Outgoing Document – this can be done by any user of the system. To add an outgoing document, the user just needs to click the “Documents” on the sidebar, then click the “Outgoing Documents” menu tab. The user will be redirected to the Outgoing Documents index page. Click on the **[Add Outgoing Document]** link to add a new one.



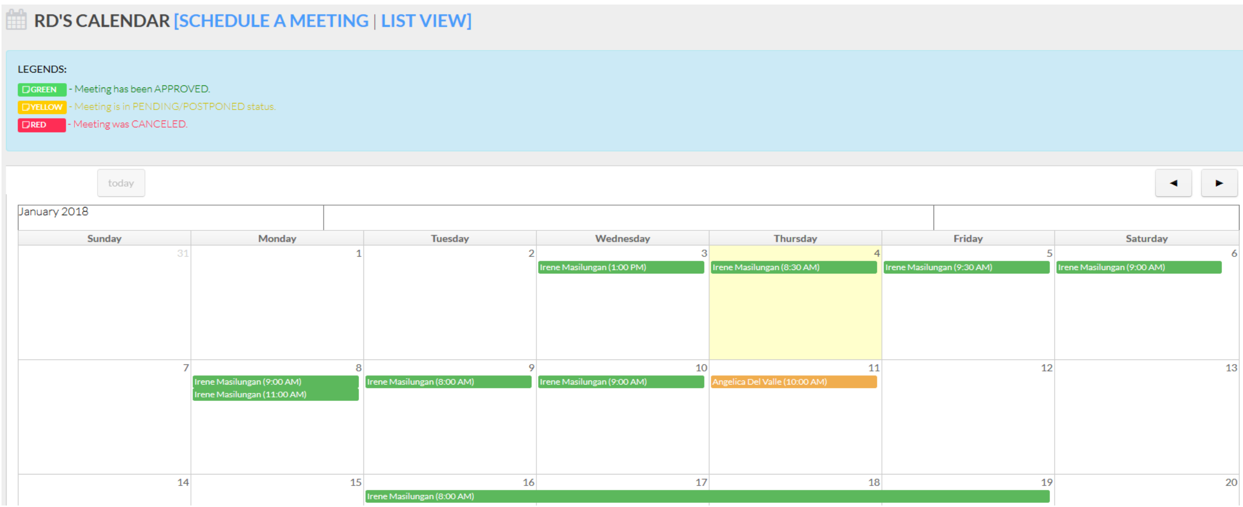

- Fill in all the attachment details, for those are required fields. For the Routing Details, there are three types of ‘Rout Mode’ as well:
  - Individual – if this is selected, the user needs to select the name of the person under the ‘Route To’ mode. All the names of the employees are listed under this textbox
  - Group – if this is selected, the user needs to select a group/unit under the ‘Route To’ mode. All the names of the groups and units recorded are listed under the textbox
  - Tag All Employees – if this is selected, once the record is saved, it will automatically notify all active employees of the organization

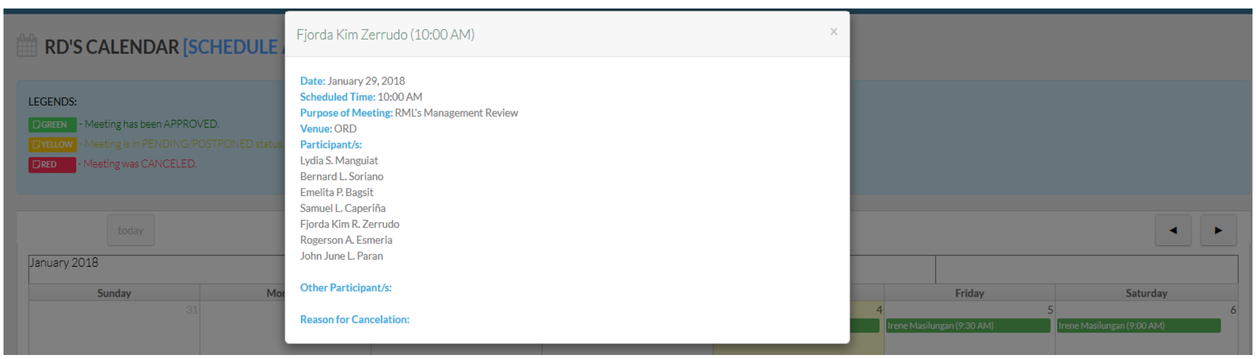



- The **‘Routing Details’ portion IS NOT REQUIRED.** After filling in all the necessary details, especially the required portion which is the ‘Attachment Details’, just click on the “Save” button on the bottom part of the page. Once saved, those who were tagged in the document will be notified as well. It will then also, reflect to the account of the CDS, DC, and RD.

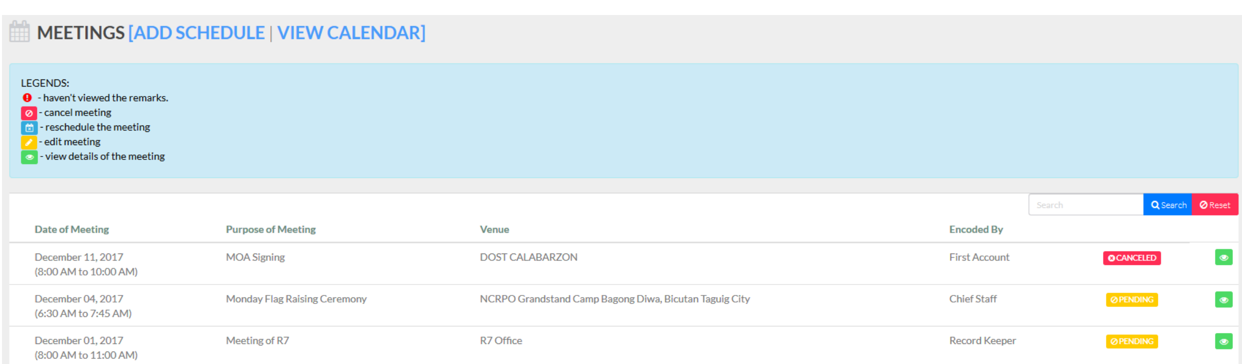
# VI. RD'S SCHEDULE

- The Calendar View of the RD's Schedule basically displays the availability and schedule of the RD in a calendar form. It has a color-coded structure: (1) green, which means the meeting has been approved by the RD; (2) yellow, which means the meeting is still in its pending status; (3) and red, which means the meeting was cancelled by either the RD or the requestor. A user may also click on the schedule plotted on the calendar to see more of the details of the schedule

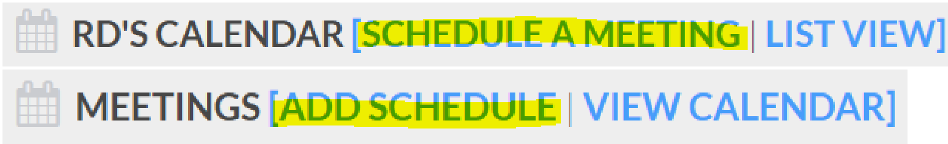


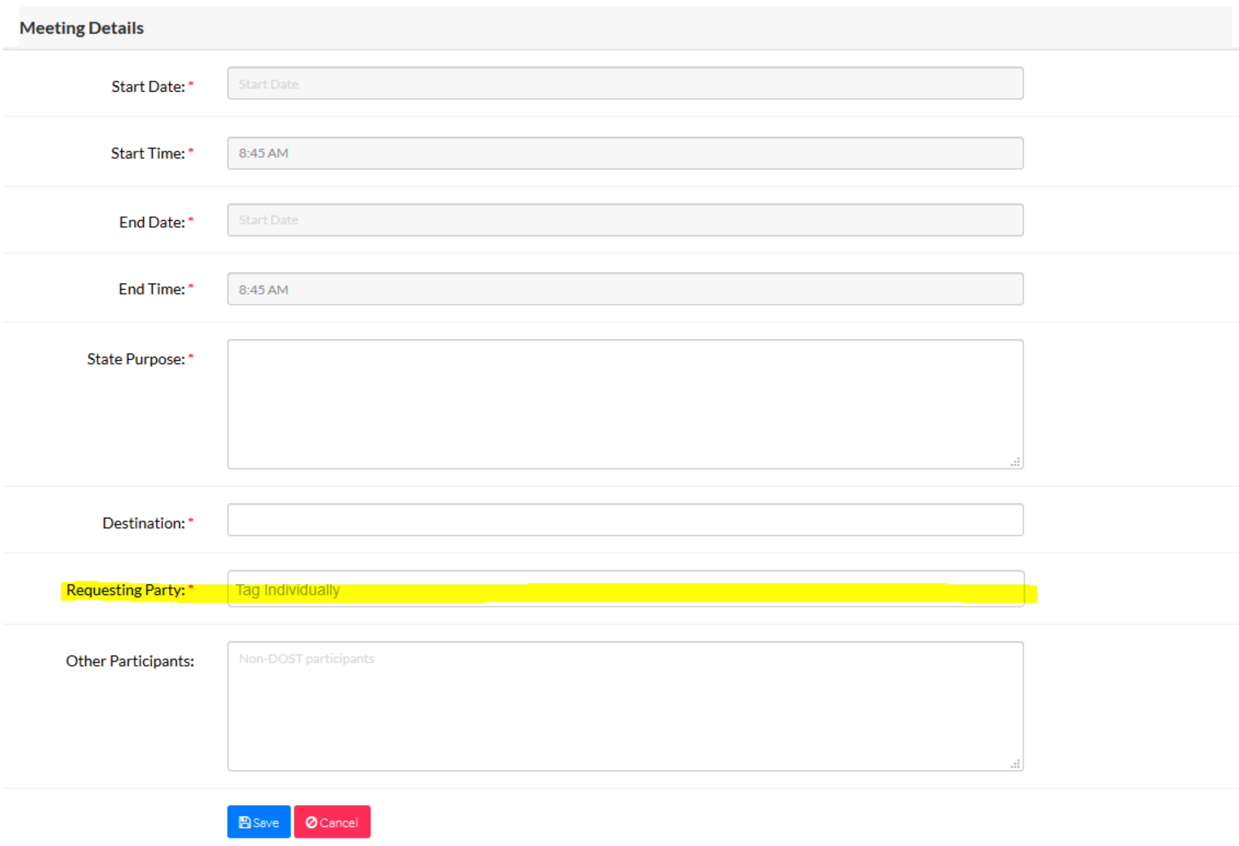

- The List View displays all the schedules the user has created and those which he/she has been tagged. Basic details of the schedule is shown in a tabular form, with the status shown as well.



- To schedule a meeting, either click on the **[Schedule A Meeting]** (if the user is in the CALENDAR VIEW) or **[Add Schedule]** (if the user is in the LIST VIEW) link to proceed.




- Scheduling a Meeting – this can be done by anyone in the organization. Just fill in the details for **MOST OF THE FIELDS ARE REQUIRED, except for the Non-NCRPO Participants portion.** After filling in the details, click on the "Save" button to record it. **REMINDER: In the 'Requesting Party' textbox, input your name, for it to be recognized that it was that user who is requesting a schedule.**




## VII. EVENTS

- Calendar View of the Events Schedule basically displays all the scheduled events of the organization. To view the details, a user may also click on the schedule plotted on the calendar to see more, or proceed to the list view of the events.
- List View displays all the events in a list form. It makes the user aware of the events he/she hasn't viewed yet, or those events which needs a confirmation.
- Adding of Event – this can be done by anyone in the organization. Just fill in the 'Event Details', most of it are required as well. The 'Attachment Details' is for the file uploading, the **maximum file size that can be uploaded is up to 10MB.** For the

'Notification Details', this is not required as well. Again, the notification mode has three modes:

    - Individual – if this is selected, the user needs to select the name of the person under the 'Route To' mode. All the names of the employees are listed under this textbox
    - Group – if this is selected, the user needs to select a group/unit under the 'Route To' mode. All the names of the groups and units recorded are listed under the textbox
    - Tag All Employees – if this is selected, once the record is saved, it will automatically notify all active employees of the organization

- The 'Needs Confirmation' is basically the RSVP function for the event. If the tagged/notified employees for the **event needs to confirm their attendance, the "YES" should be selected. If it's only for information, and no need to confirm, just select "NO"**. After filling in the necessary details, just click on the "Save" button. The confirmation of attendance will reflect on the viewing of the saved event.

## VIII. COMPANY

- Adding of Company Details – adding of company can be done by anyone. But a user can only what he/she has added. To add a company, just click on the "Company" from the sidebar, and the user will be redirected to the company listing. Click the **[Add Company]** link to proceed with the adding of a new company

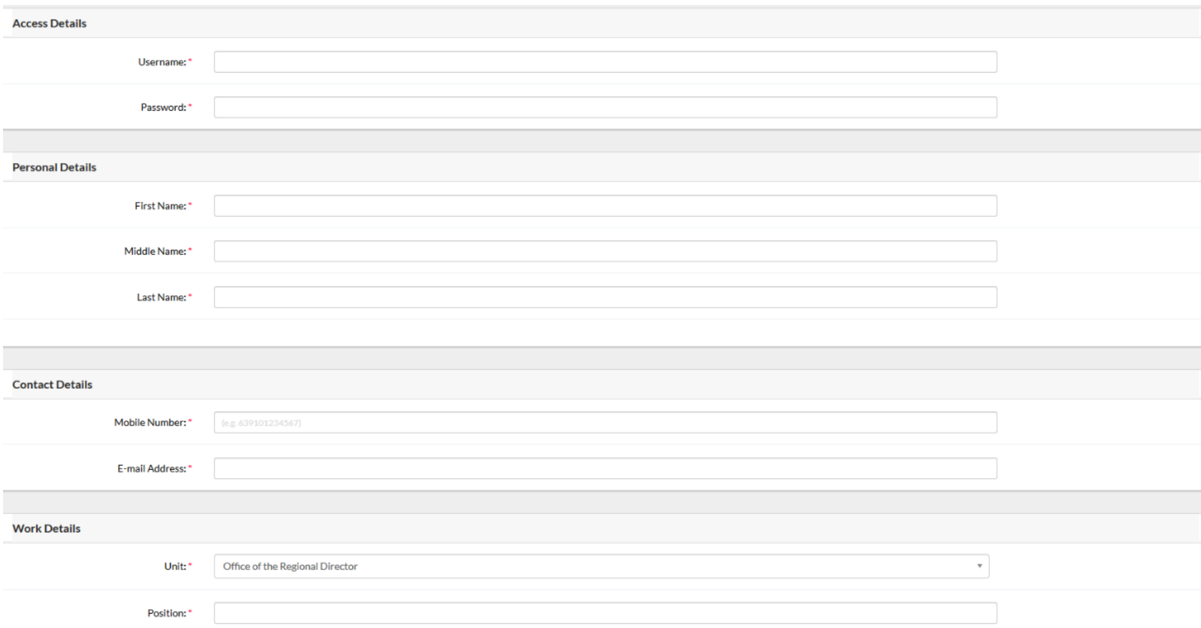

- Upon adding a new company information record, **only the "Company Name" and "Company Address" is required**. BUT it's better to have everything filled out so that this feature of the system can also serves as a company directory to your organization. After filling in the details, just click on the "Save" button to have it recorded.

## IX. EMPLOYEES

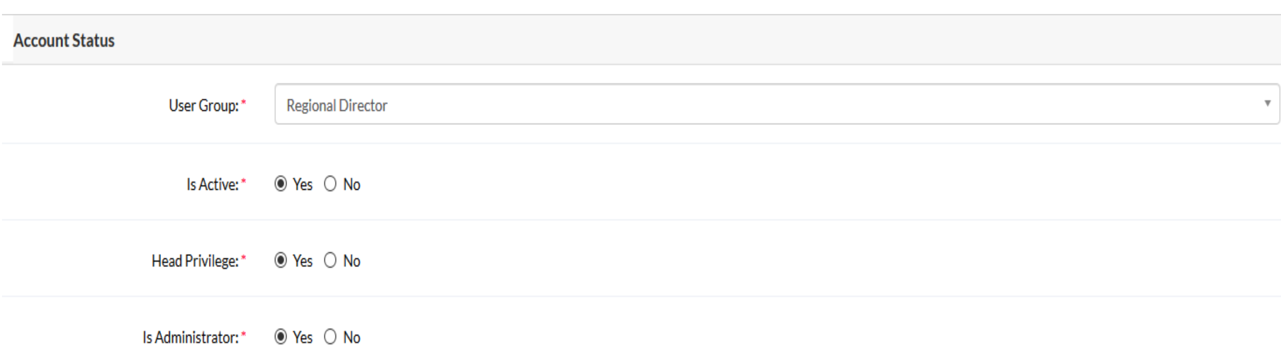
- Groups – this displays all the groups and/or unit in a list form. From the list view, it displays the group name and how many members belong to the said group. To view all the members from the group, just click on the **BLUE EYE ICON** on the right side of the table
    - Adding of Groups – this can only be done by the administrator of the system, which are the employees from the ICT unit of the organization. To add a group, just click on the **[Add Group]** link to proceed and just type in the group/unit name, then click the "Save" button


- Accounts – this displays all the active user accounts in your organization in a list form. To view more of their details, just click on the **GREEN EYE ICON** on the right side of the table.

- Adding of User Accounts – this can only be done by the administrator of the system, which are the employees from the ICT unit of the organization. To add a new user, just click on the **[Add Account]**. **EVERY SINGLE FIELD IS REQUIRED. PLEASE MAKE SURE EVERY TEXTBOX IS FILLED. *Note: For the mobile number, make sure it starts with 63 (for e.g. 639101234567)**

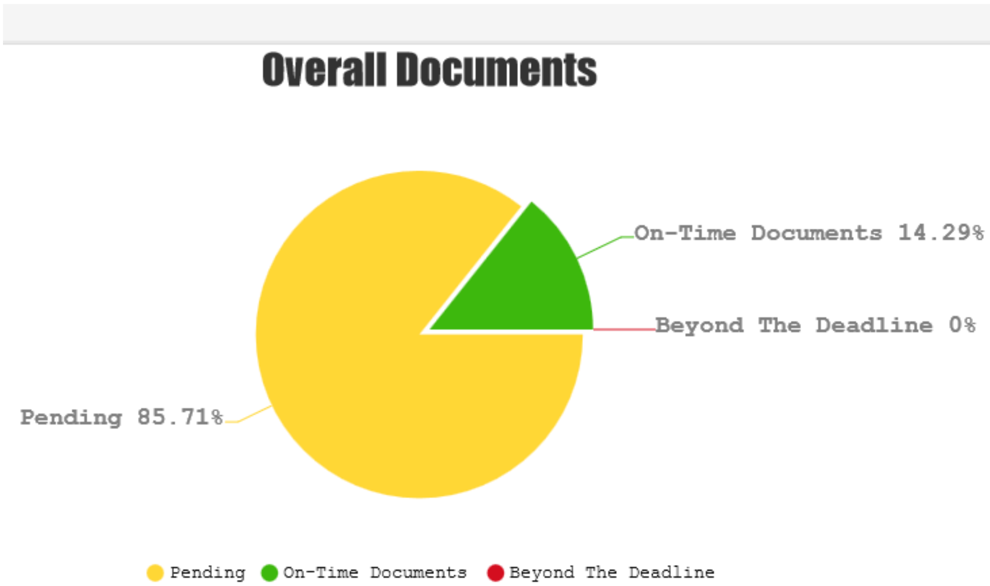




- Adding of Account (Account Status) – this determines in which features and functionalities can a certain employee access. (1) for the User Group, please refer to the first part of the manual to see the different types of User Group; (2) if an employee is still active or part of the organization, select "Yes", but once a staff leaves the organization, **MAKE SURE TO EDIT THE ACCOUNT AND SELECT NO;** (3) the head privileges is for the RD and ARDs only, this is **to determine the account who can view ALL THE STATISTICS OF EACH USER**; (4) Is Administrator – **select "Yes" if the staff is from the ICT Unit ONLY**, **if he/she is from another unit, select "No"**



## X. STATISTICS

- The Statistics can only be seen by those accounts with "Head Privileges" and the Administrators of the system (ICT unit). This is categorized to three parts:
  - Document Statistics – this is the overall pie chart of the whole organization, this only displays the TRACKED DOCUMENTS. Three colors represent the status of the documents: (1) yellow for pending, (2) green for on-time documents, and (3) red for beyond the deadline.




  - User Statistics – Displays the statistics breakdown of each employee in a list form. In this form, the top management will be able to see which employee can reply efficiently and their percentage.

STATISTICS

Search User | Search | Reset

| Name | 1-2 Days | 3-5 Days | 6-9 Days | More Than 9 Days | Total Tracked | Total Incoming | |
|---|---|---|---|---|---|---|---|
| Acccount, Second | 2 (100%) | 0 (0%) | 0 (0%) | 0 (0%) | 2 | 2 | |
| Account, First | 4 (100%) | 0 (0%) | 0 (0%) | 0 (0%) | 4 | 4 | |
| Account, Third | 2 (100%) | 0 (0%) | 0 (0%) | 0 (0%) | 2 | 2 | |
| Account, Fourth | 3 (100%) | 0 (0%) | 0 (0%) | 0 (0%) | 3 | 3 | |
| Account, Fifth | 2 (100%) | 0 (0%) | 0 (0%) | 0 (0%) | 2 | 2 | |
| Admin, Deputy | 1 (100%) | 0 (0%) | 0 (0%) | 0 (0%) | 1 | 1 | |

  - Unit Statistics – displays the statistics breakdown for each unit group in a list form

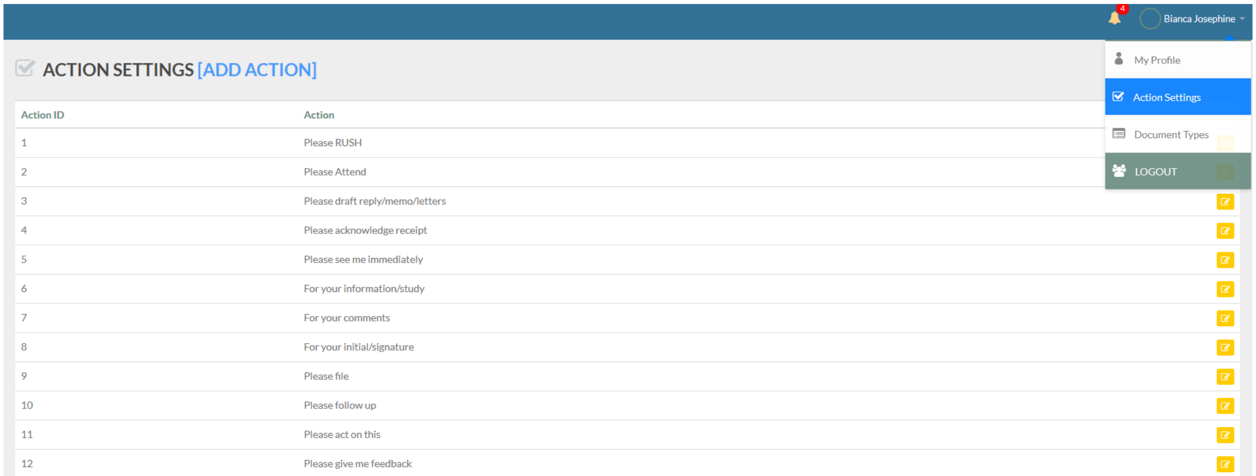
STATISTICS

Search User | Search | Reset

| Name | 1-2 Days | 3-5 Days | 6-9 Days | More Than 9 Days | Pending | Total Tracked | Total Incoming |
|---|---|---|---|---|---|---|---|
| Office of the Regional Director | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |
| ODRDA | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |
| ODRDO | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |
| ORCDS | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |
| SRDS | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |
| RPRMD | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |
| RID | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 (0%) | 0 | 0 |

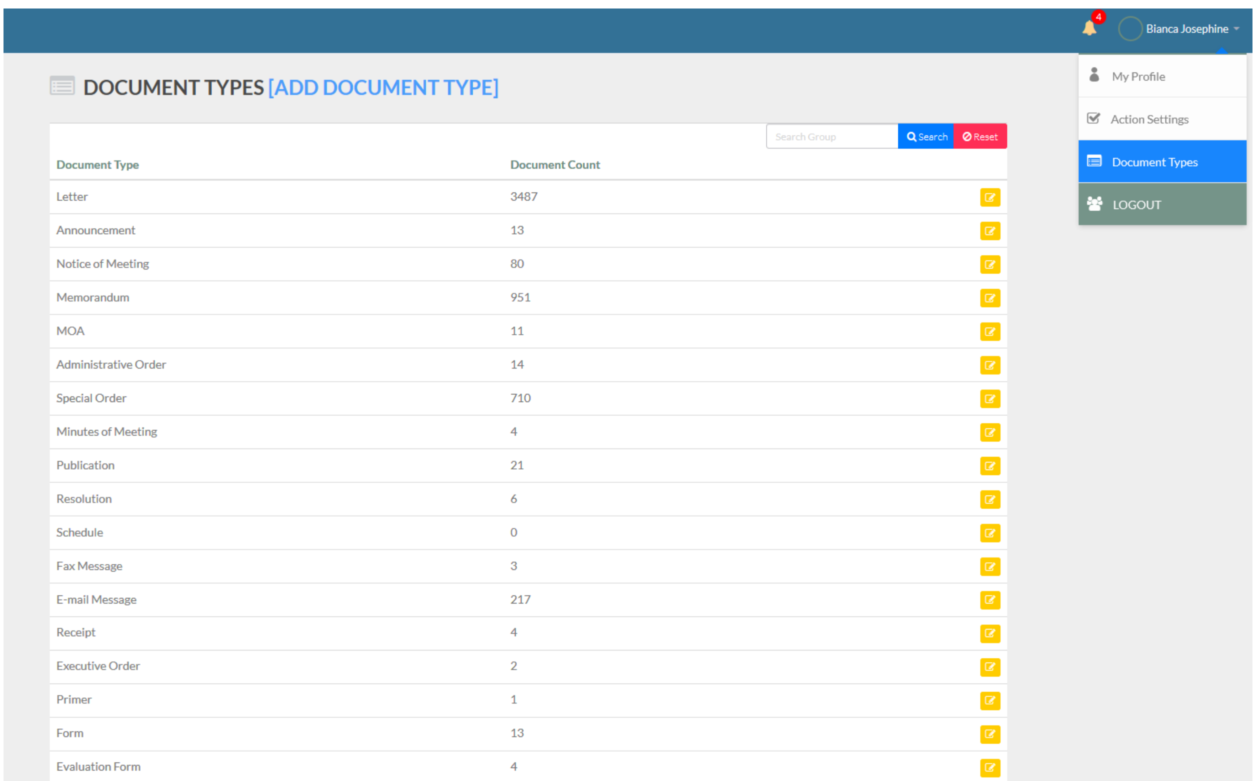
# XI. ADDITIONAL ADMINISTRATOR SETTINGS

- Action Settings – This feature lets the administrator add or edit an existing action. The said actions listed on the table is what can be seen when an RD routes an incoming document.




| Action ID | Action |
|---|---|
| 1 | Please RUSH |
| 2 | Please Attend |
| 3 | Please draft reply/memo/letters |
| 4 | Please acknowledge receipt |
| 5 | Please see me immediately |
| 6 | For your information/study |
| 7 | For your comments |
| 8 | For your initial/signature |
| 9 | Please file |
| 10 | Please follow up |
| 11 | Please act on this |
| 12 | Please give me feedback |

- Document Types – The administrator can add a new document type or edit an existing one. In the list, the administrator can also see the total count of documents for each type.




| Document Type | Document Count |
|---|---|
| Letter | 3487 |
| Announcement | 13 |
| Notice of Meeting | 80 |
| Memorandum | 951 |
| MOA | 11 |
| Administrative Order | 14 |
| Special Order | 710 |
| Minutes of Meeting | 4 |
| Publication | 21 |
| Resolution | 6 |
| Schedule | 0 |
| Fax Message | 3 |
| E-mail Message | 217 |
| Receipt | 4 |
| Executive Order | 2 |
| Primer | 1 |
| Form | 13 |
| Evaluation Form | 4 |