Work Action Tracking System

System Manual

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Contents

INTRODUCTION

This is an operations guide for the Work Action Tracking System (WATS). WATS was designed to provide a way to maintain and track work assignments. This system provides ease of entry, modification and reporting on work actions

GETTING STARTED

System Requirements

WATS requires the following software:

- Microsoft's Internet Explorer version 5.5 or higher
- Adobe Acrobat Reader
- Oracle Jinitiator

If you do not have the software stated above installed on your PC, please contact the Application Development Support Team at ARIS@ars.usda.gov for assistance.

Registration for New Users

New users must submit a registration form in order to receive a user account to access the system. You can download a registration form from the web site https://arisapp.ars.usda.gov. At the Applications Main Menu select Registration from the top menu. The registration forms are Microsoft Word documents. Click on the WATS link to open the WATS registration form and fill out the form. Save the form and attach the form to an e-mail and send it to the ARIS mailbox at ARIS@ars.usda.gov. The ADB staff will contact you with a user ID and password to give you access to the WATS system

Installing Required Software

You will need to do a one-time install of Oracle's Jinitiator plug-in software. The Jinitiator software can be downloaded from the web site https://arisapp.ars.usda.gov. At the Applications Main Menu select Jinitator from the top menu. Then click on "Download Oracle Jinitiator 1.3.1.18" and follow the instructions on the screen. After the file is downloaded to your PC, execute it and follow the instructions shown on the screen to install it.

How to Log On

To start WATS:

- Double-click on the ARIS shortcut icon located on your PC's desktop. If you do not have an ARIS icon, you can open Microsoft's Internet Explorer and type in the following address: https://arisapp.ars.usda.gov and click 'Go'

- Read the Government Usage Policy and click ‘I Agree’
- At the Applications Main Menu, select ‘WATS’ from the menu
- Enter your User Name and Password and then click the ‘Login’ button
- The Work Action Tracking System Main List screen will now display .

Note on Password Security: Passwords are required to be changed every 60 days. The password must be between 6-8 characters in length and it is not case sensitive. If you forget your password, contact Application Development Support Team at ARIS@ars.usda.gov so they can reset it for you.

Logging Off

To exit Work Action Tracking, click on the ‘Exit’ icon. You will be returned to the Applications Main Menu screen. To exit this screen, click on Internet Explorer’s close button ().

REMINDER: If the system is left idle for 30 minutes or more, a time out will occur and you will be disconnected from the system.

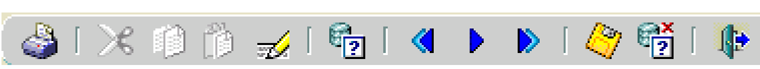
Technical Support

If you need technical assistance or need to have your password reset, contact the OCIO/ADB at ARIS@ars.usda.gov and put in the Subject line: “WATS Technical Support Request”. In the message box, provide a complete description of your problem or request. If error messages appear on your screen, capture the screen image by pressing the “Print Screen” button on your keyboard and then pasting the image into a Word document. Attach that word document to your e-mail.

THE BASICS

How to Use the Toolbar

For most actions Work Action Tracking, there is more that one way to do them.
This is an example of a standard Work Action Tracking toolbar:



 Prints the current screen (performs a screen print only)

 Cuts selected text

 Copies selected text

 Pastes selected data

 Displays the text editor

Navigates to the first record in the list

Navigates to the previous record in the list

Navigates to the next record in the list

Navigates to the last record in the list

Saves any unsaved changes

Cancels any unsaved changes

Exits the current screen

Form Buttons and Features

List of options pull down menu. User must use the pick list to choose the appropriate value. Typing the first letter will cause the correct choice to display in the field.

C Displays a graphical calendar for the selection of a date

Control No - Buttons appear on the tops of each column on List screens. These buttons are provided to facilitate sorting the records in different orders. Clicking the button the first time will sort the records in ascending order for the field below. Clicking the button again will sort the list in descending order for the field below. The button will continue to toggle between ascending and descending order.

Windows-Based Options Available:

CTRL - X	Cuts the highlighted text
CTRL - C	Copies the highlighted text
CTRL - V	Pastes the highlighted text to the place where your mouse cursor is

Cut, copy, and paste are also available by right-clicking with your mouse on highlighted text.

Sorting

You can sort data on any List screen by clicking on the column heading you wish to sort by. For example, if you want to sort recipients by name, click on the "Name" column heading. This will put the recipients in ascending order by name. To put the recipients in descending order by name, click on the "Name" column heading again.

Help Options

A Help option is available on the main menu. The following options are available:

Records Help	Displays the user who created the record, the date it was created, the user who last modified the record and the date it was modified.
Last Query	Displays the fields that the last query was based on for the current block.
Order By	Displays the sort order of the current block.
Display Error	Displays information about any errors received.
About	Displays the current form, block, file, and user.

Error Messages

Error messages and system informational messages will appear in boxes in the center of the screen. This will require the user to press OK to proceed.

Fields Descriptions of the Main List and Detail screens:

Originating Office
The Office of the user who created the action. This is the organization's acronym.

Sequence Number
This is a concatenated value. It combines the four digit fiscal year with a five digit incremented number.

Action-Number
This is a concatenated value. It combines the originating office with the SEQUENCE-Number. It is displayed on the Main Menu screen.

Status
This is the present state of an action. It is **Released** if it is assigned to user(s). It is **Canceled** if the originator cancels it. It is **Completed** if the originator marks it completed. It is **Held** if the originator places it on Hold.

Originator
This is the name of the person who created the action.

Due On
The date on which the action should be completed.

Canceled On
The date on which the action was canceled.

FYI
For Your Information. The user is not expected nor required to complete the action.

Assigned On
The date on which the user assigned the action

Completed On
The date on which the action was completed.

OA Action #
The OA Action number assigned.

To
The name or group name of the users assigned to the action.

From
The group name or individual user who created the action.

Subject
The topic or subject matter of the action.

Comment
This is additional instructions, or information that may be necessary for the assigned users.

Assigned
The user, or group assigned the action.

Assigned On
The date the action was assigned to each user.

Due On
The date the action should be completed.

Canceled On
The date the action was canceled.

Completed On
The date the action was completed.

Status
The status of an action assigned to users.

Work Action Tracking Main List Screen

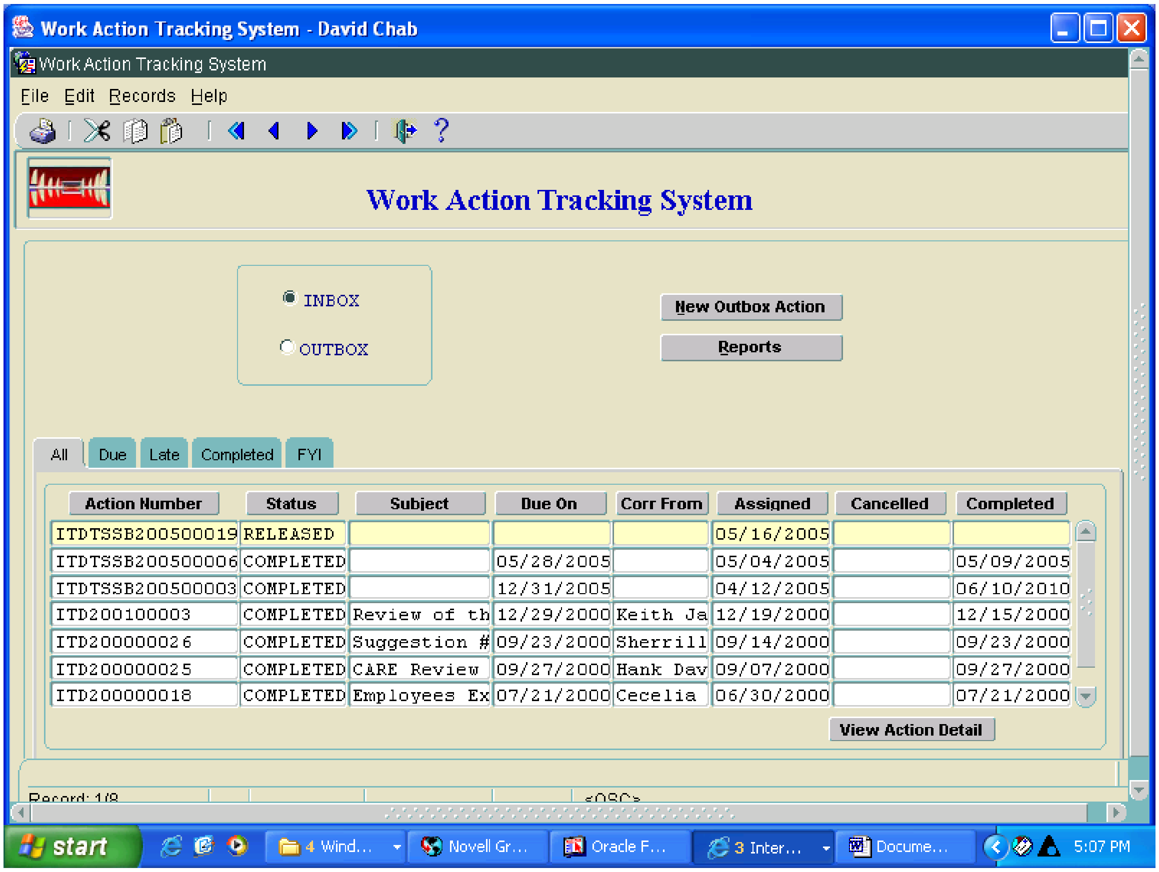


FIGURE 1 Work Action Tracking Main List Screen.

Description: The Work Action Tracking Main List Screen is the main entry point from which users may view Inbox actions, update Outbox actions, create new Actions, or navigate to the reports menu. Each user logging into the system has access to their actions only. The main screen defaults to the Inbox option being selected. Clicking the appropriate tabs will filter Inbox actions on the following: All, Due, Late, Completed and FYI.

Inbox option – Select to display records that are assigned to the current user. This is the system default.

Outbox option – Select to display records that the current user assigned to others.

New Outbox Action button – Select to create a new OUTBOX action.

Reports button – Select to display "Reports Menu".

View Action Detail button – Select to display the Inbox Action detail screen.

All tab – Select to display all actions assigned to the current user including FYI actions.

<u>Due tab</u> – Select to display actions assigned to the current user that have not been completed or canceled.

<u>Late tab</u> – Select to display actions assigned to the current user that are late.

<u>Completed tab</u> – Select to display all actions assigned to the current user that have been completed.

<u>FYI tab</u> – Select to display **For Your Information** actions only.

Inbox Action Detail Screen

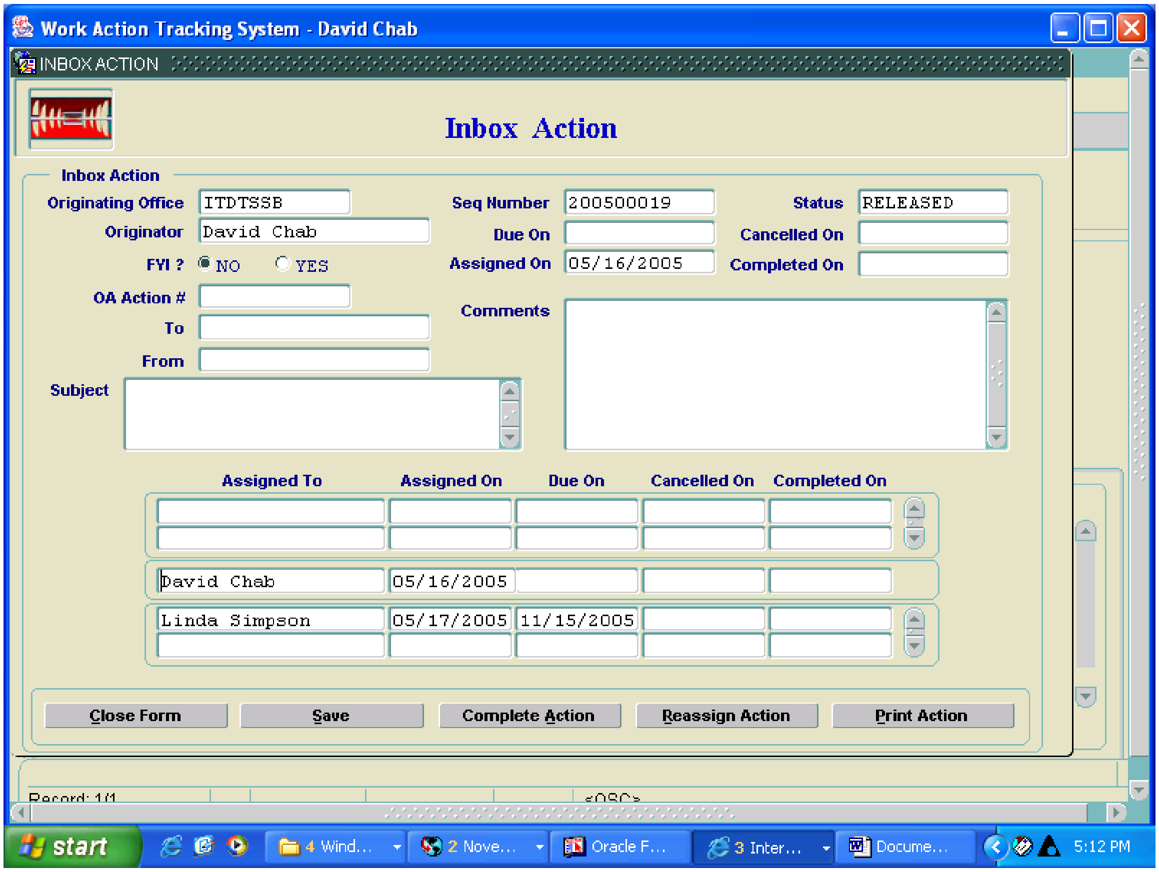


FIGURE 2 Inbox Action Detail screen.

Description: The Inbox Action screen displays detailed information on the Inbox action selected from the main screen. The Inbox Action detail screen allows the user to complete an action, reassign an action to a different assignee, print the action, save changes and exit the form.

Close Form button – will allow the user to exit the form without saving changes made.

Save button – will allow the user to save changes made to the screen.

Complete Action button – will allow the user to complete the action. When this option is selected, the cursor will be positioned in the **Completed On** date field located in the lower portion of the screen. Enter a valid date using format mm/dd/yyyy. Use this option to show that you have completed the action assigned to you. After a valid date is entered, select the SAVE to keep the new information you entered. Select the CLOSE FORM button to close the form and return to the Main Menu.

Reassign Action button – will allow the user to reassign the action to another user (assignee). This option is available only to users who are authorized to create actions. After clicking this button, the **New OutBox Action** form will be displayed with the data from the previous screen. The action will continue to be assigned to the current user. If action item is canceled by the originator, the reassigned item will not be canceled. The user reassigning the item will also have to cancel the item.

Print Action button – will display the action in PDF format. From there, the user can print the action.

Work Action Tracking Main List Screen when Outbox Selected

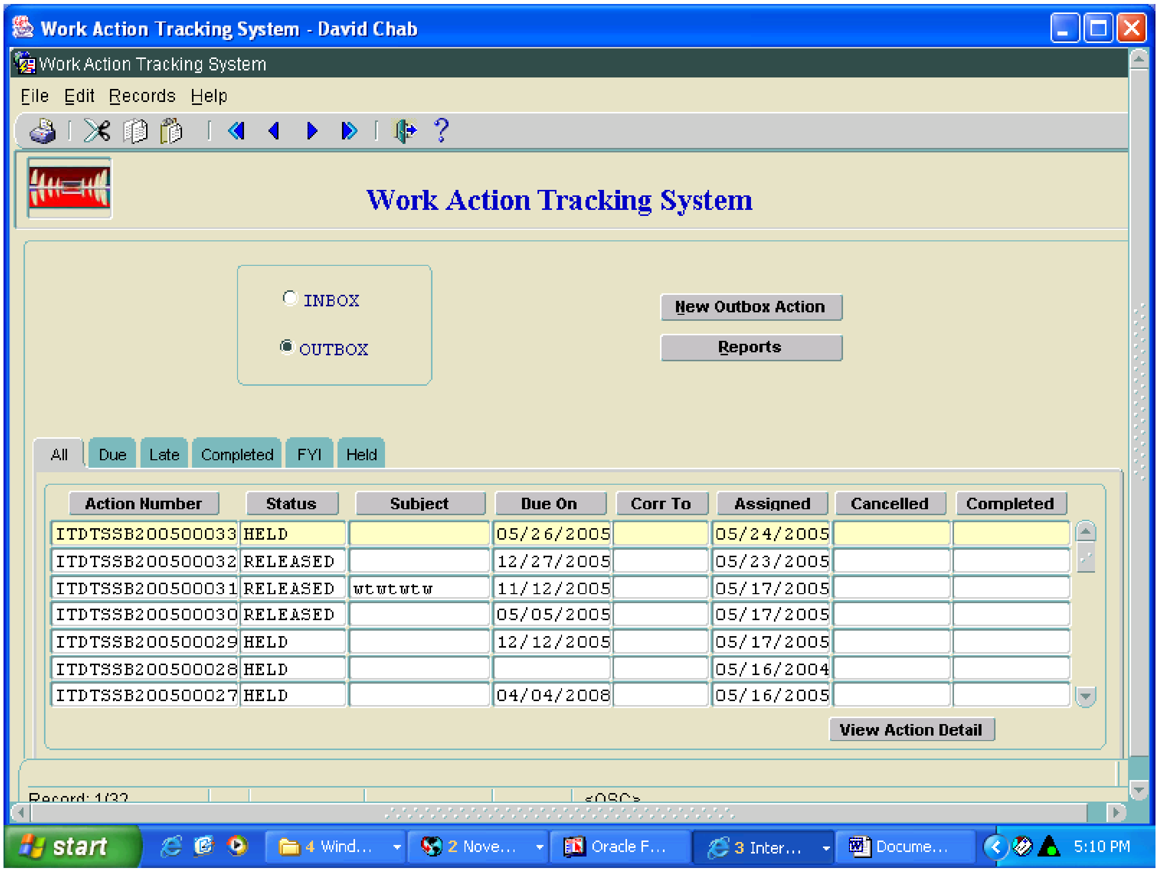


FIGURE 3 Work Action Tracking Main List screen when Outbox selected.

Description: When the user selects the Outbox option on the WATS main screen, they will have access to their Outbox actions. The actions may be grouped by All, Due, Late, Completed, FYI, Held via clicking the appropriate tabs. Clicking the View Action Detail button will display the Outbox Action detail screen. See the detailed information for WATS Main screen when Inbox Selected, plus the following:

<u>Held tab</u> - Select to display actions that are being held by the current user.

Outbox Action Detail Screen

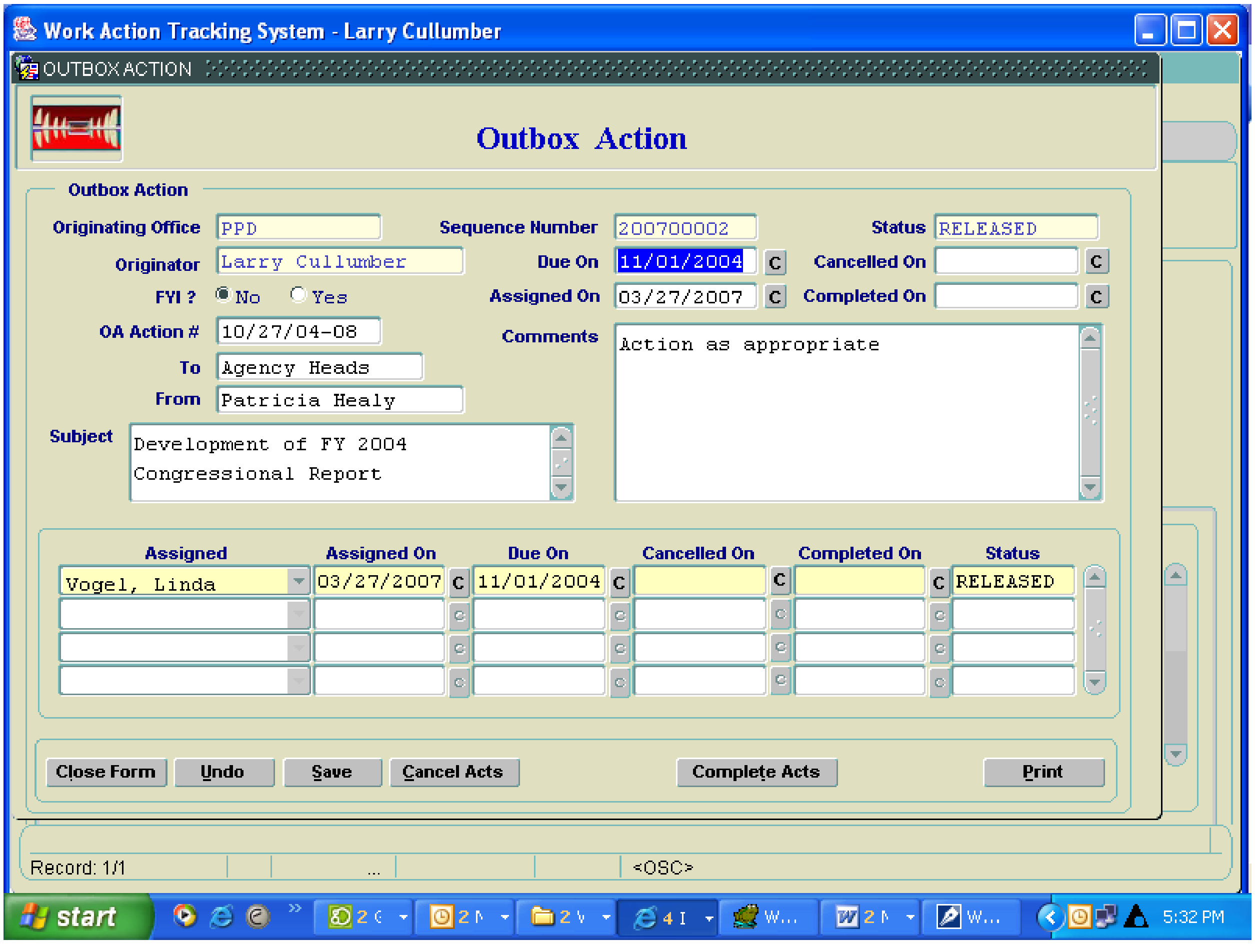


FIGURE 4   Outbox Action Detail screen.

Description: The Outbox Action detail screen allows the user to update detailed information for the outbox action selected from the WATS main screen.

Close Form button – will allow the user to exit the form without saving changes made.

Undo button – will allow the user to undo changes and still remain on the screen.

Save button – will allow the user to save the changes made to the record.

Cancel Acts button – will allow the user to cancel the action. When this option is selected the current date will be inserted in the **Canceled On** field in the upper portion of the form and in the **Canceled On** field of each individual assigned to the action. This will not cancel the actions that actions that have been reassigned. After the changes have been made, the **Undo** button can be selected to literally undo the changes. To keep the changes select the **Save** button.

Reopen Acts button – appears only for canceled actions. Clicking this button will allow the user to reopen and release a previously canceled action. The **Canceled On** fields will be blank.

Complete Acts button – will allow the user to complete the action. When this option is selected the current date will be inserted in the **Completed On** field in the upper portion of the form and in the **Completed On** field of each individual assigned to the action. To change the date entered on the upper portion of the form, click the button to the right of the **Completed On** field, select the desired date and select **OK.** To change the date entered on the lower portion of the screen, position the cursor to select the field, delete the date shown, then enter the desired date. Format **mm/dd/yyyy**

Release Acts button – will allow the user to release the action. This option applies only to actions that are **HELD**. Held actions are not visible to the assigned user(s). When the action is **RELEASED**, only then is it available to the assigned users.

Print button –
Select this option to print the action being viewed on the screen.

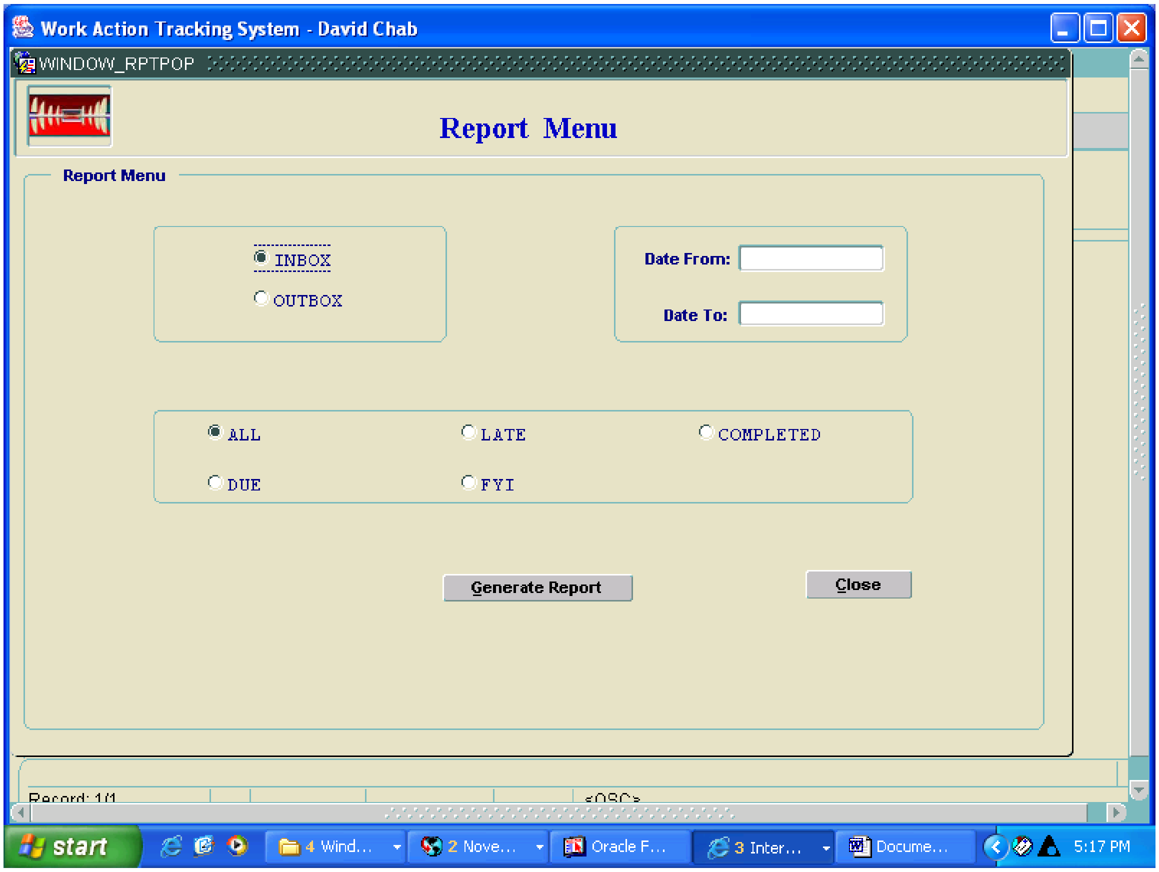


FIGURE 5 Reports Menu screen.

Description:
Inbox and Outbox Action reports are generated using Reports Menu screen to enter the information relevant to the report to be generated. Reports can be filtered on the following categories present on the **Main List** screen for either Inbox or Outbox actions:

<u>All option</u> – When no date is entered, all records assigned will be reported. To select actions assigned within a specific period of time, enter the beginning and ending dates in the **Date Range**.

<u>Due</u> <u>and</u> **<u>Late option</u>** – The report will display all Due or Late actions as of the current date. No date is required. The actions will be displayed by order of due date.

<u>FYI option</u> – Actions assigned for information only.

<u>Completed</u> option – To select actions completed within a specific period of time, enter the beginning and ending dates in **Date Range**. When no date is entered, all completed actions will be generated.

Held option – Actions that have not been released by the current user. (Available for Outbox actions only)