



Electronic Records Management in TAILS

Tracking
And
Integrated
Logging
System

Electronic Records Management in TAILS

Benefits

Managing Electronic Records in TAILS allows you to:

- ◆ Find documents with ease
- ◆ Have easy access to documents uploaded to TAILS
- ◆ Create reports that show all the documents that you have queried
- ◆ Download documents from ECOS server or local servers
- ◆ Create Hyperlinked Indexes that are easy to use by your customers
- ◆ Allows for electronic storage of CDs on site

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Storing Electronic Records

Work with your IT Department to decide where to store electronic records

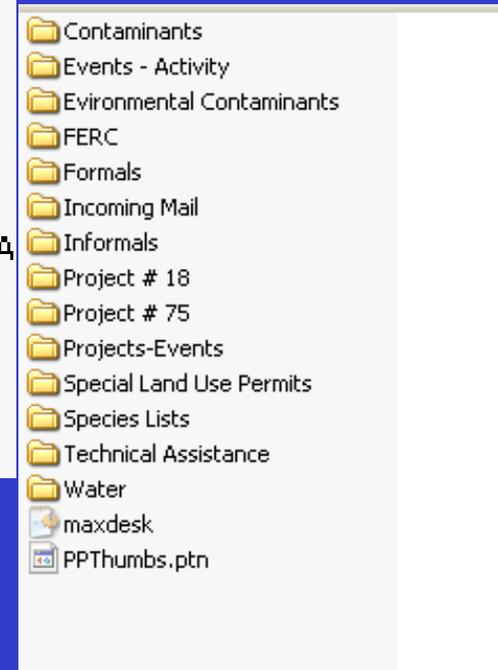
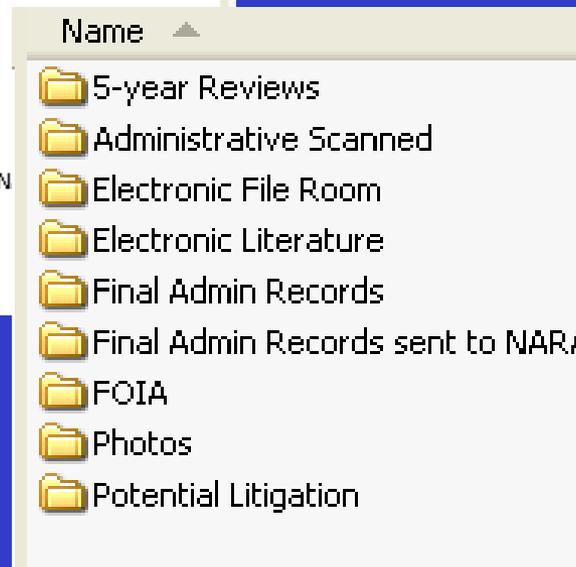
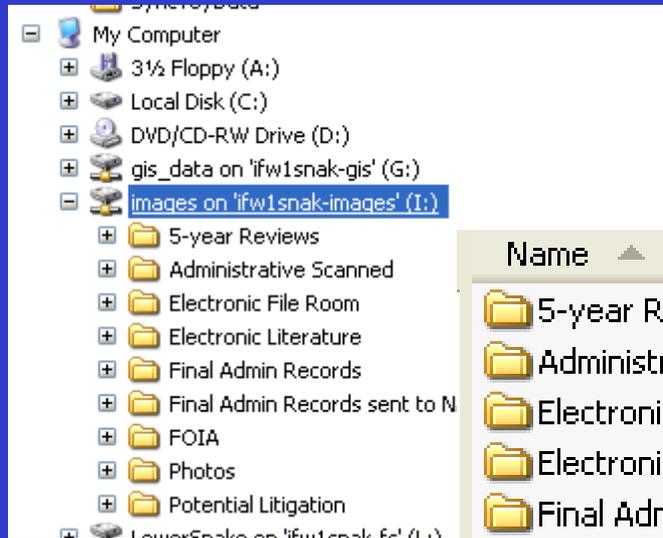
- make a partitioned drive on a dedicated server
- or make a folder on a shared drive/server

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Decide Naming Conventions

- ◆ By Folder
- ◆ By File Name
- ◆ By identifiable numbers
 - Date
 - TAILS assigned numbers
 - Paper file numbers
 - By Year

Decide Naming Conventions



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Electronic Records Management in TAILS

ECOS Digital Document Library

- ◆ Documents can be uploaded to TAILS and become part of the EDDL
- ◆ Always accessible
- ◆ All documents conveniently located with Activity Record
- ◆ PDFs will be text searchable (coming soon)
- ◆ Available to the Administrative Record Report

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Administrative Record Report

- ◆ Aids in assembling an admin record
- ◆ Gathers all electronic docs associated with Activity or Event
- ◆ Can serve as hyperlinked index file
- ◆ Coming soon: All associated uploaded docs can be zip-and-shipped as a group

Administrative Record Report										
Lead Region	Lead Office	Fiscal Year	Activity Type	Activity Code	Activity Title	Event Date	Event Description	Event Type	Count in Performance Reporting	File Name
1	IDAHO FISH AND WILDLIFE OFFICE	2008	Contam	14420-2008-EC-0001	EIFO - Smoky Canyon Mine Pole Canyon ODA					S:\Images\2008\EC\08_I_0001_SmokyCanyon.pdf
1	IDAHO FISH AND WILDLIFE OFFICE	2008	Contam	14420-2008-EC-0002	EIFO - River Valley Ranch Level 1 Contaminant Survey	11/05/2007	Level 1 contaminant survey conducted on 11/5/07.	Site Visit Made	No	S:\ES\Images\2008\EC\08_EC_0002_RiverValley.pdf
1	IDAHO FISH AND WILDLIFE OFFICE	2008	Contam	14420-2008-EC-0003	EIFO - Downton Level 1 Contaminant Survey	11/05/2007	Site visit made to conduct Level 1 contaminant survey.	Site Visit Made	No	S:\ES\Images\2008\EC\08_EC_0003_Downton.pdf

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Assembling Electronic Administrative Records

Scanning

- ◆ It doesn't matter what software you are using to scan in documents just so the end result is a PDF file
- ◆ National Archives and Records Administration (NARA) will accept electronic files in PDF format

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Naming Scheme

- It is very important to get your naming scheme down for electronic documents. Here are some samples:
 - Literature Cited example: **Holecheketal1998.pdf** or **ScholtenBunting2001.pdf**
 - In litt example: **BLM2000inlitt.pdf** or **Debolt1998inlitt.pdf**
 - Pers comm. example: **QuinneyWeavers1998pc.pdf** or **Cooke2002pc.pdf**
 - E-mail example (and this is real important because of the volume of e-mails) **email_96_1015_154p_Rey.pdf** (Because of the way that a computer alphabetizes its files it is important to identify it as an email then put the year and then the date, then the time of the e-mail and then the name of the sender.)
 - Fax example: **Fax_96_0117_NTaylor.pdf**
 - Memo example: **Memo_96_513_USFWS.pdf**
 - Letter example: **Letter_96_607_Ruesink.pdf**

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Index Creation

- Complete an Index for the Administrative Record.
 - This must be done before you organize electronic files BUT does not have to be done before scanning is done.
- Convert your index to PDF
- After the Index is completed and there are no more changes then you must organize your electronic records.
 - Number your Index (Select All...Format....Bullets and Numbering....Select numbering)
 - You will need to go to your electronic folder and number documents by order of the Index. Example:
0001_FRvol55no35_22190.pdf,
0002_letter_91_0128_DHoyem.pdf,
0003_letter_91_219_DQuinney.pdf
0004_letter_91_1220_DQuinney.pdf
 - Remember the computer is going to put it in order of the first character and then the second and so on. If you know it is going to be a big document start with 000 or 0000

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Hyperlink or Bates Stamp

- After electronic documents are organized according to the index now you can do one of two things:
 - Hyperlink PDF files to the index: Use Acrobat 5.0 or higher.
 - Or Bates Stamp
 - Required for Court hearings

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Hyperlinking

Open your PDF index using Acrobat Professional

Index of the Administrative Record for the Section 7 Consultation Between the Snake River Fish and Wildlife Office and Clearwater National Forest for the North Lochsa Face Ecosystem Project, Idaho

Contents of North Lochsa Face Administrative Record are listed in reverse chronological order.

Email message with Subject: nlf rod errata letter from Dan Davis to Paul Moroz discussing changes made to final alternative selection for North Lochsa Face with letter attached. Dated January 15, 2003. Attached letter titled North Lochsa Face Ecosystem Management Project Record of Decision Errata, Clearwater National Forest. Dated January 6, 2003. [Bates No. 1-2]

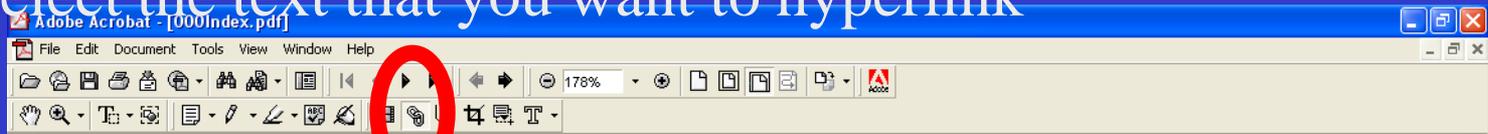
Excerpt from Addendums to the Section 7 Watershed Biological Assessments for the Potlatch River. Lolo Creek, Lochsa River and North Fork Clearwater River Drainages, Clearwater River Subbasin – Updates of Status and the Effects of Activities during 2000 and 2001 on Fall Chinook Salmon, Steelhead Trout and Bull Trout, Clearwater National Forest. Dated June 3, 2002. [Bates No. 3-5]

Memorandum from Supervisor, Snake River Basin Office, U.S. Fish and Wildlife Service to Stephanie Nash, Fish and Wildlife Service, Portland. Subject: Review of Draft Supplemental Environmental Impact Statement for the North Lochsa Face Ecosystem Management Project, Clearwater National Forest, Idaho County, Idaho, ER #02/145, File #104.0000, OALS #02-0520. Dated March 14, 2002. [Bates No. 6-10]

Assembling Electronic Administrative Records

Hyperlinking

Find the linking tool on toolbar (two chains that link together)
Select the text that you want to hyperlink



The screenshot shows the Adobe Acrobat interface. The toolbar at the top contains various icons for file operations and navigation. A red circle highlights the 'Linking' tool, which is represented by two interlocking chains. Below the toolbar, the main content area displays a document titled 'Index of the Administrative Record for the Section 7 Consultation Between the Snake River Fish and Wildlife Office and Clearwater National Forest for the North Lochsa Face Ecosystem Project, Idaho'. The document text is as follows:

Index of the Administrative Record for the Section 7 Consultation Between the Snake River Fish and Wildlife Office and Clearwater National Forest for the North Lochsa Face Ecosystem Project, Idaho

Contents of North Lochsa Face Administrative Record are listed in reverse chronological order.

Email message with Subject: nlf rod errata letter from Dan Davis to Paul Moroz discussing changes made to final alternative selection for North Lochsa Face with letter attached. Dated January 15, 2003. Attached letter titled North Lochsa Face Ecosystem Management Project Record of Decision Errata, Clearwater National Forest. Dated January 6, 2003. [Bates No. 1-2]

Excerpt from Addendums to the Section 7 Watershed Biological Assessments for the Potlatch River, Lolo Creek, Lochsa River and North Fork Clearwater River Drainages, Clearwater River Subbasin – Updates of Status and the Effects of Activities during 2000 and 2001 on Fall Chinook Salmon, Steelhead Trout and Bull Trout, Clearwater National Forest. Dated June 3, 2002. [Bates No. 3-5]

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Hyperlinking

- A dialog box will pop-up.
- Select the Appearance properties.
- Under Action - Select Open File:

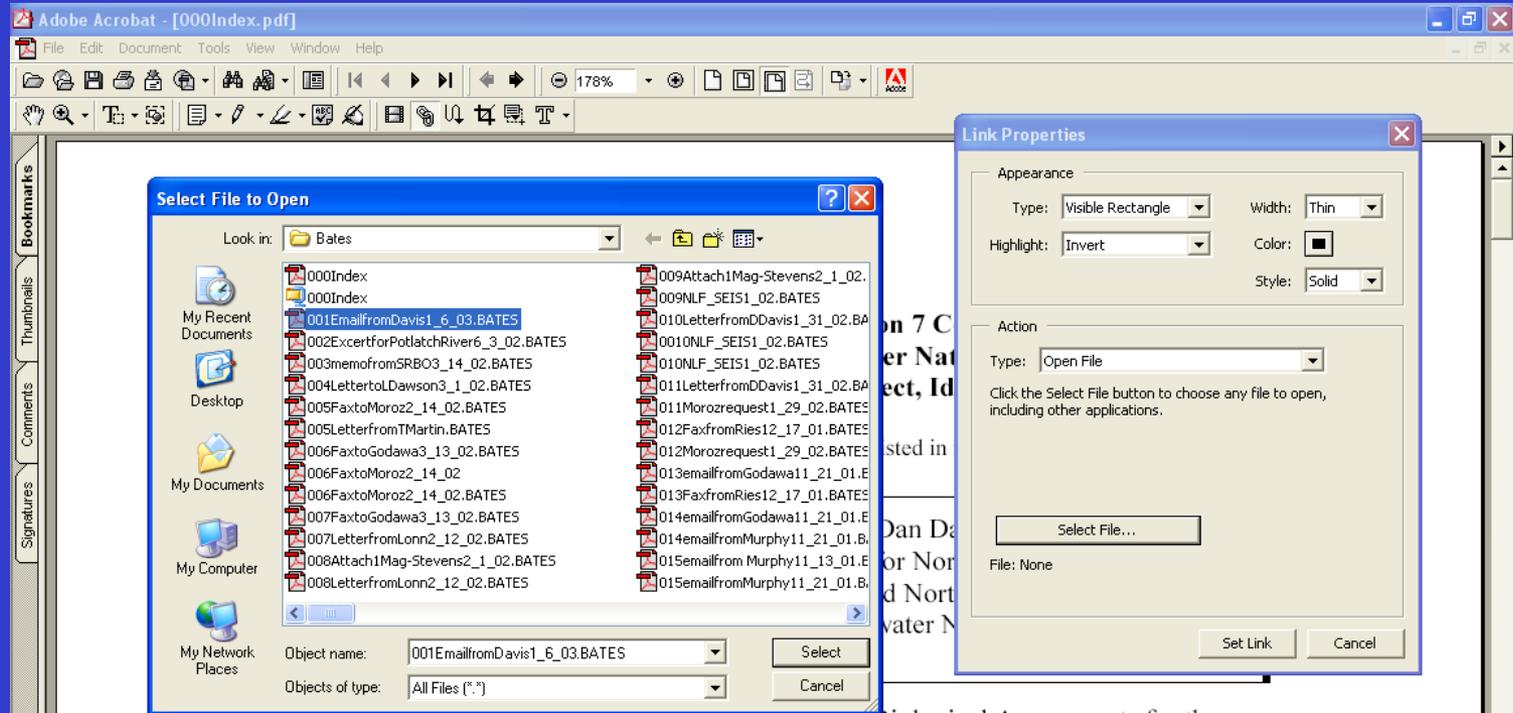
The screenshot shows a web browser window displaying a document. The document title is "Index of the Administrative Record for the Section 7 C Snake River Fish and Wildlife Office and Clearwater National Forest North Lochsa Face Ecosystem Project, Idaho". The main text reads: "Contents of North Lochsa Face Administrative Record are listed in". Below this, there is a list of links, each enclosed in a box. The first link is: "Email message with Subject: nlf rod errata letter from Dan De... discussing changes made to final alternative selection for North... attached. Dated January 15, 2003. Attached letter titled North... Management Project Record of Decision Errata, Clearwater National... January 6, 2003. [Bates No. 1-2]". A "Link Properties" dialog box is open over this link. The "Appearance" section shows "Type: Visible Rectangle", "Width: Thin", "Highlight: Invert", and "Color: [black square]". The "Action" section shows "Type: Go to View" and a list of actions including "Go to View", "Import Form Data", "JavaScript", "Movie", "Open File" (which is selected), "Read Article", "Reset Form", "Show/Hide Field", "Sound", and "Submit Form". "Set Link" and "Cancel" buttons are at the bottom of the dialog.

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Hyperlinking

Browse to the file that you want to hyperlink and select it. You will now see the file that is linked.



Excerpt from Addendums to the Section 7 watershed Biological Assessments for the Potlatch River, Lolo Creek, Lochsa River and North Fork Clearwater River Drainages, Clearwater River Subbasin – Updates of Status and the Effects of Activities during 2000 and 2001 on Fall Chinook Salmon, Steelhead Trout and Bull Trout, Clearwater National Forest. Dated June 3, 2002. [Bates No. 3-5]

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After Hyperlinking

- ◆ Burn CD
 - Make sure that everything is in the same folder
- ◆ Check that all links are there
 - It is always nice to have some one else check your work before sending it. (QA/QC)
 - Always make directions for using the CD

SAMPLE:

(You must have Adobe Acrobat Reader to read this CD)

Place CD in drive...open folder

Click on 00_Index

Hover over the entry that you would like to view and click. Click on back arrow to get back to the index.)

- ◆ Package it all up and send to your Customer

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Resources

Bates Stamping:

<http://www.afabonline.com/>

Scanners:

www.canon.com

<http://www.usa.canon.com/opd/controller?act=OPDCateoryIndexAct&fcateoryid=2204>

Adobe Acrobat Professional:

<http://www.adobe.com/products/acrobat/>

Scansoft Paperport 9 (11)

<http://www.nuance.com/products/>

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