TRACS Quick Reference Guide

Course 1: Getting Started with TRACS **Lesson 1d: Navigation, Reset Password and Update Profile**	
Step	**Action**
Steps to Reset Password and Login for a NON-FEDERAL User	
1	From the TRACS login screen (https://tracs.fws.gov), Non-Federal users select “Sign-in with Login.gov”.
2	To reset your password, select the “Forgot your password” link. a. You will receive a system-generated e-mail with a link to reset your password. This link expires in 6 hours, so make sure you use it right away. b. The link in the e-mail will re-direct you to the Reset Password screen. Fill out the form to change your password. Your password should not be a commonly used password (or match any of the previous 24 passwords used). It must be a minimum of 12 characters and contain a combination of lower and upper case characters, and contain at least one non-alphanumeric character, such as: #*$%!. Numeric characters are optional. Note: If you receive a password reset email and you did not initiate the reset procedure, contact the TRACS Help Desk immediately. Note: If you are unable to login and your account is new, it may still be pending user administrator approval. You will receive an email once your account has been approved and you can login. If you have any questions, contact your User Administrator or the TRACS Help Desk at tracs-helpdesk@fws.gov or call 1-844-408-7227.
Steps to Reset PIN and Login for a FEDERAL User	
1	From the TRACS login screen, Federal users must select “Sign-in with DOI Login (PIV)”.
2	Select the “Sign in with PIV Card” link. • The PIV Smart Card credentials window. Enter your PIN. TRACS will automatically sign you in without an additional password needed. If you are having issues with your PIV Card or credentials, please contact the IRTM Help Desk (1-800-520-2433).
Update your User Profile	
1	Login and select the box with your initials in the upper right-hand corner of any page in the TRACS application. Then select “My Profile”. Click on the box again to close it.
2	Your Profile page opens displaying your current contact info, account status, activity and permissions. a. Click on “Edit Contact Information” if needed, then update your name, title, phone, extension and/or organization. Note: Contact information managed by your sign-in provider cannot be modified. Federal users can login to MyAccount (https://myaccount.fws.gov) to update your profile information, which will then be automatically updated in TRACS. b. Click on “Activity Details” to view your user activity log.
Help Desk, Log Out, and Time Out Rules	
	To log out of TRACS, simply close the browser window or click on the box with your initials in the upper right and select “Log Out of TRACS”.

If you need assistance, please contact the TRACS Help Desk at:

- Email: tracs-helpdesk@fws.gov
- Phone: 1-844-408-7227 (1-844-40-TRACS)
- Help Desk contact information is displayed in the “Help” pop up box when you select your initials in the upper right. Help Desk information is also displayed in the footer bar in TRACS.

The Department of the Interior sets the timeout threshold for the TRACS application at 15 minutes with no activity. Before timing out, the system will provide a pop-up asking if the user would like to “Refresh Session”.

TRACS Modules Overview

After logging in to the TRACS system, the homepage opens displaying the main functional modules of TRACS. Access to the modules is restricted based on the user’s roles. For example, only User Administrators can access the “User Management” Module.

- **Performance Module:** The Performance module is used by grantors and grant recipients to create, manage, review and approve the administrative and mandatory components of grant proposals and performance reports that document the progress and completion of grant objectives.
- **Inventory Module:** The Inventory module is used by grantors and grant recipients to create, adjust, manage, approve and monitor real property and facility records pertaining to acquisition or disposal actions which serve a grant purpose and therefore have a Federal nexus.
- **Administrative Module:** The Administrative module is used by state and territories that receive grants to enter, review, certify, and submit the number of paid hunting and fishing license holders on a annual basis. Hunting and fishing license holder figures are used in the calculation of grant funding available to each state and territory.
- **User Management Module:** The User Management module involves the process of group and role assignments, deactivating user accounts; tracking users and their respective Access authorizations; and managing these functions. Organization administrator(s) grant permissions directly to users, manage role and group permission assignments for their organization. Users who cannot view or perform certain functions were not granted the permissions to do so by the organization administrator.

Navigate TRACS

To navigate the site, select one of the modules. A dashboard screen will open providing buttons to access the workflows and reports within that module based on the user’s permissions.

On most Dashboard screens, a ‘Reports’ button opens the reports list page, allowing users to generate preset reports on the data in TRACS. On each Dashboard screen, additional information is displayed in the lower half of the screen, including:

- Recent Activities: User-specific list of your recent activities in that module, such as recent grants or inventory records you created or updated.
- Quick Reports: User-specific reports to view your open grants, closed grants, and your organization’s open grants.

- Useful Links: provides links to helpful resources, including the WSFR homepage, FA Wiki and TRACS Training Portal.

Note: If you do not have access to a button, the icon will be grey and a lock icon will display. Contact your agency's user administrator if you need access.

The system will generate "breadcrumbs" in the top left, which can be used for navigating back to a previous page. The breadcrumbs are not available after opening a page where data can be edited.

To return to the home page, click on the home icon in the breadcrumbs list or click on the TRACS logo in the upper left. You can also navigate to another module by selecting it from the top toolbar.

Within a workflow, click on the back or next buttons at the bottom of the page to navigate or use the tabs on the sidebar to jump to another page. Use the tab key to move to another field.

- Click on the question mark icon to open a "tooltip" with user help text about that field.
- A red or yellow warning box may appear if a required field is missing. The tab will also display a warning icon.

Use the Text Editor

Some fields require entry of narrative text and have a pop-up text editor window that opens when you click in the field. The text editor box allows users to format the text, links, and tables. Note: Images will not display in the text editor and they will not copy/paste over with the text – instead any images or photos should be added as attachments. The text editor has a variety of formatting tools including from left to right: Bold, Underline, Italicize, Color (change text color or highlight text), Font Size, Paragraph Tools, Paragraph Styles, Alignment, Undo/Redo, Bullet Points, Numbering, Indent, Links, and a Table Builder.

Best Practice Tips: Pasting from a Microsoft Word Document may open a formatting window with option to keep the formatting from the original document or clean it up. "Clean" means that any extra characters, white space, text colors or highlights, or other formatting will be removed from the text. This option does not appear when pasting from a PDF.

A table may be pasted into the text editor (or use the table tool to create a table). Note: an Excel table that is embedded into a Word document will need to be opened in the Excel format to enable pasting (double-click on the embedded table to open it).

Add and Manage Attachments

Best Practice Tips: Attachments are used to upload supporting documentation, such as images, photos, tables, research data, reports, etc. Attachments should not replace the text in a field! The narrative fields in TRACS should be concise but may reference additional supporting attachments.

The file name should be easily identifiable and include the grant title/name (i.e. "Fish Stocking Report for WA Sportfish Grant FY 21")

Only one attachment may be added at a time. TRACS supports all file types for attachment (PDF, Word, Excel, PPT, image files, etc.) however, the system may time out trying to upload files larger than 50 MB. If you need assistance uploading an attachment, please contact the TRACS Help Desk.

	Make sure to link the attachment to the right field. Select the attachment type to better identify the attachments when they appear on the PDF created by TRACS. This information helps other data editors and approvers determine what supporting documentation is attached. Links to the attachments display on the PDF generated from TRACS. Important Note: • **Compliance documents (such as NEPA, Section 7, NHPA) must NOT be uploaded into TRACS**. These documents should be submitted with your project statement(s) as part of your formal grant application in GrantSolutions. • **Do NOT attach documents with sensitive Personally Identifiable Information (PII) unless redacted** (examples of sensitive PII may include personal email address, personal phone number, personal address, social security numbers, date of birth, bank information, etc.)
1	Narrative fields within TRACS often have the option to add attachments. Click on the "View/Attach Files (optional)" link below a narrative field. Alternately, click on "Manage Attachments" in the upper right of the workflow page.
2	The attachments window will appear displaying any existing attachments attached to the record. To add a new attachment, click "Upload an Attachment".
3	Fill out the attachment details. a. Click "Choose Files" to select a file from your computer. Note that only one attachment may be added at a time! b. Enter or update the filename to be easily identifiable (ex. Budget Table WA Sportfish Grant) c. Select the Field Tags to associate the attachment with a particular field – this option is only available if you add a general attachment using the "Manage Attachments" option. The field tags are specific to the form (i.e. grant proposal or project statement). d. Select the Attachment Type. The attachment type is important because it identifies what the attachment is, such as an indirect cost statement, budget table, before or after photo, etc. e. Click "Upload".
4	The attachment will display in the table. In the actions column on the right, select "Edit Properties" or "Delete" if needed ("Remove from field" will also display if the attachment is linked to a particular field). Click on the filename with the arrow icon to download the file. Use the "Upload an Attachment" option to continue to add more attachments, then click "close".