CORRESPONDENCE TRACKING SYSTEM - EVER ME

CORRESPONDENCE TRACKING SYSTEM

USER GUIDE

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1. General Rules

Note that all the following buttons will have the same function through the whole application:

	Add	This button allows the user to add a new row.
	Delete	This button allows the user to delete the selected row.
	Edit	This button allows the user to modify the selected row.
	view	This button allows the user to view the list of items.
	Save	This button allows the user to save the record.
	complete	This button changes the status of the mail from “new” to “complete”.
	Reset	This button will reset all the fields found in the page.
	Back	This button will take the user back one page.
	Transfers	This button allows the user to transfer a mail to different contact(s) or department(s).
	Links	This button allows the user to link correspondences together.
	Archive	This button allows the user to archive his correspondences in Cabinets, Shelves, Binders and Folders.
	Track	The track button shows a full report about all actions that a correspondence was exposed to.
	Execute Query	This button allows the user to view all the items according to the search criteria he entered.
	Search Tool	It is a search tool, where the user enters a free text and clicks on the search button. Upon clicking on the search button, the list will be populated with the new results.
Page 1	Number of pages	Is the number of pages, where the user can go from one page to another using this combo box that contains the **Number of pages.**
Page Size 20	Page Size	The Page size in the right corner contains a list of values; the list will be affected by the grid for example "20" means that the grid will contain 20 rows per page.

2. CTS LOGIN

The access to the system is controlled and restricted to the authorized users. The screen shown below permits the admission of a username and a password. The administrator initially creates these two fields for the user and the owner can modify the password at any time through the menu option **My Password**.

(Figure-1)

The (Figure-1) displays the login screen for the CTS.

In the username area, the user enters his username and in the password area, he has to enter his password.

3. CTS HEADER

(Figure-2)

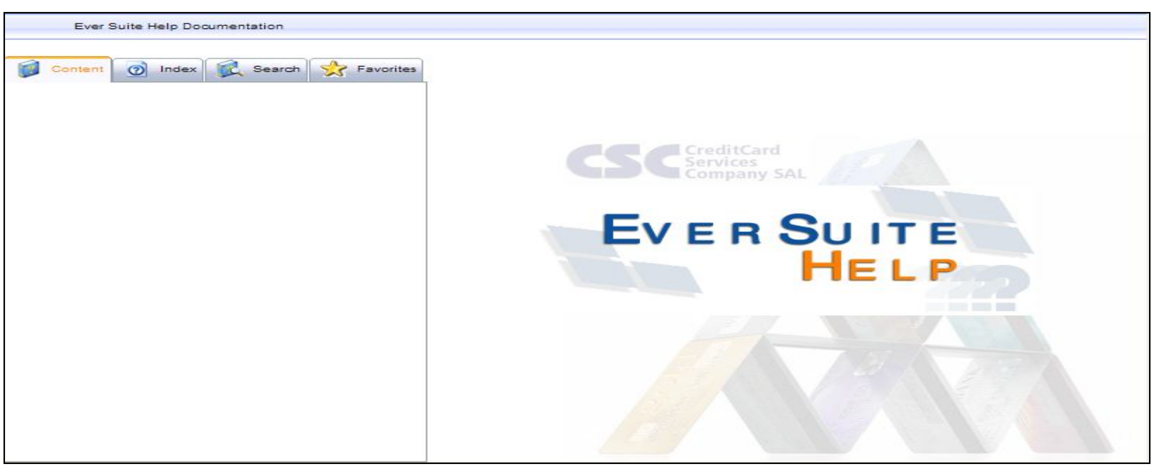
The application header (Figure-2) displays the project name (Correspondence Tracking System), the user name, the current date and the following toolbar.

- In order to change the password, the user can access the "Change Password" section by clicking on (Figure-3).

(Figure-3)

The current password is required to make any password modifications. The user should contact the administrator in case of a forgotten password.
The user should type in his old password, the new password and confirm it and then save through button.

- Clicking on the button will open (Figure-4) allowing the user to view the help index.



(Figure-4)

Overview

The Help menu calls the Help template. The Help Template is contextual. In other words, it displays help corresponding to the context the user is in. A context is defined by 3 different criteria: Project, Template and Component. The 3 criteria are filled by the underlying Project. If not, the Help template shows the EverSuite Help Content Chapters in the Index pane and main page in the Main pane.

The Help Template looks like a standard Windows Help file providing the following components.

The Index Pane

The Index pane provides the following 4 tabs:

Content

The Content tab displays the Help Table of Content (standard Help interface)

Index

Displays a place holder where text can be entered. As text is entered, the list of related indexes is displayed in a list box for selection. When an index is selected, the corresponding content is displayed in the Main pane.

Search

Displays a place holder where a search expression can be entered. When the expression is entered the user clicks on the Search button to display in a list box in the same pane the list of all related content. The Titles of the Content are displayed. Selecting a Title displays its corresponding Content in the Main pane.
An "Advanced" option allows the user to search the expression in:

- The Title field only.
- The Content field only.
- The keyword field only.
- In all fields.

No selection or deactivating the "Advanced" option defaults to an "All fields" search.

Favorites

Displays the Titles of all bookmarked Contents each proceeded by a Checkbox. Selecting a Title displays its corresponding Content in the Main pane. Activating the preceding Checkbox marks the corresponding Title for removal.
Three icons are also available in the Favorites pane:

- Remove: selecting the Remove icon in the Favorites pane removes the bookmark of all checked Titles.
- Select: selecting the Select icon in the Favorites pane activates the checkboxes of all Titles for removal.
- Unselect: selecting the unselect icon in the Favorites pane deactivates checkboxes of all Titles for removal.

- The button will open (Figure-5) allowing the user to log off from the application.

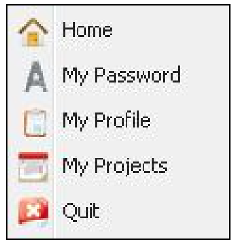
(Figure-5)

The button proceeds to log off the user, the button cancels the log off operation.

4. GENERAL

The **General** section 

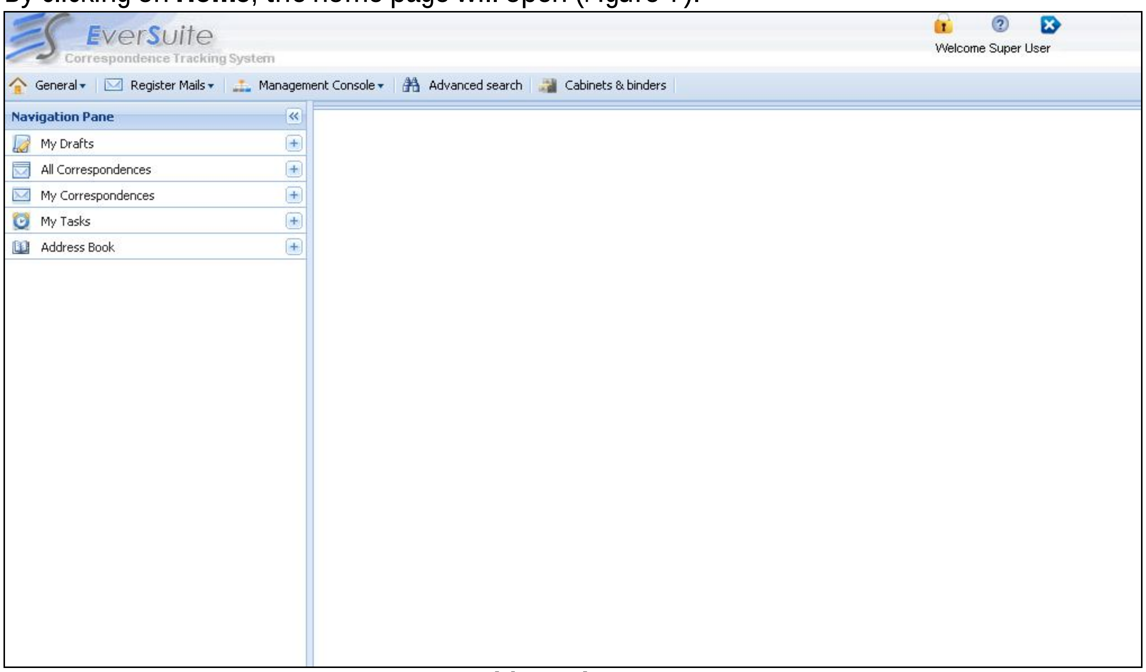
displays the following list (Figure-6).



(Figure-6)

4.1 HOME

By clicking on **Home**, the home page will open (Figure-7).



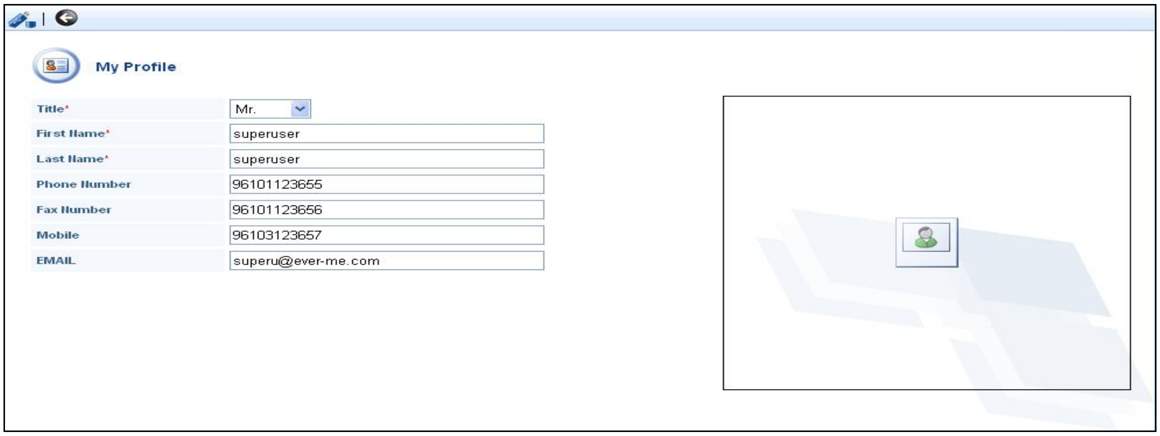
(Figure-7)

4.2 MY PASSWORD

Refer to section 3: "CTS Header" for detailed instructions on changing a password.

4.3 My Profile

The "**My Profile"** section (Figure-8) allows the user to fill in the necessary information related to his profile.

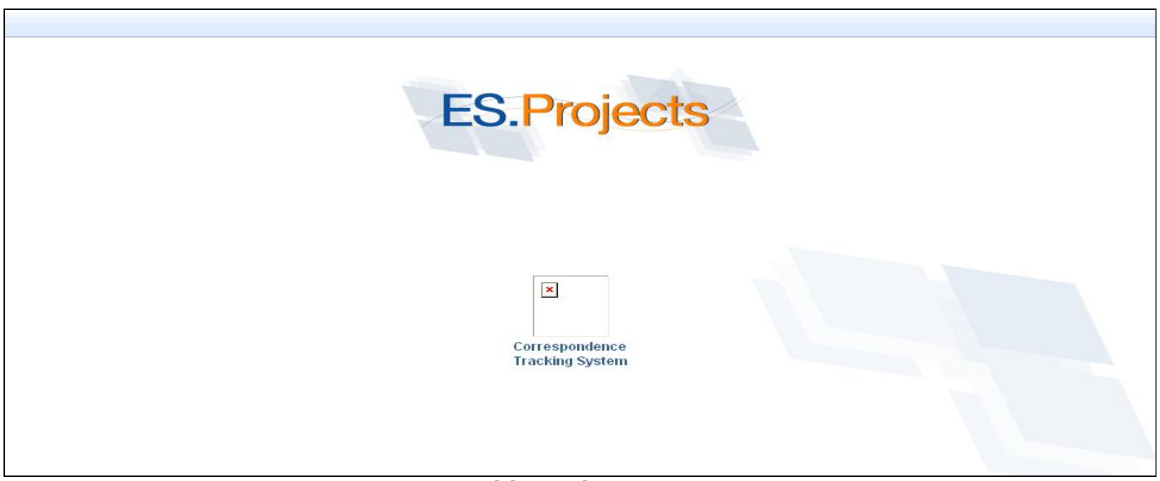


(Figure-8)

<u>N.B.:</u> Note that all fields followed by a red star (*****) are mandatory fields.

4.4 My Projects

When the user clicks on **My Projects**, the following page will open (Figure-9), allowing the user to view the Project's Icons.



(Figure-9)

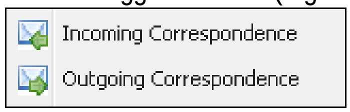
4.5 Quit

Refer to Section 3: "CTS Header" for detailed instructions on logging off.

5. Register Mails

The **Register Mails** tab 

at the left corner of the home page, displays both the incoming and outgoing mails for the logged in user (Figure-10).



(Figure-10)

The user registers the mail by filling out the indexes of the selected mail.

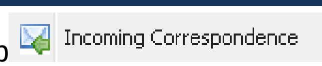
The save button  at the top left corner of the frame is usable once the fields are filled out.

Finally the registered mail that is saved by the User will be displayed in the mail list.

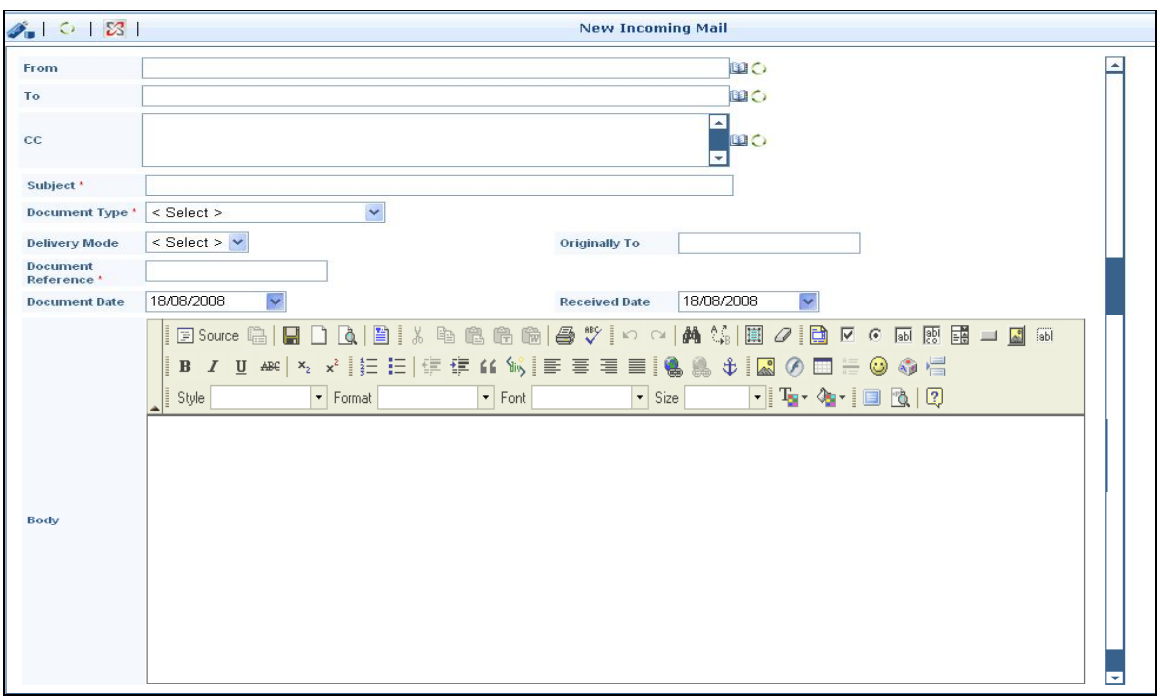
Fields are cleared by clicking on the Reset button .

N.B.: The fields marked in red are mandatory and the user must fill them out.

5.1 Incoming Correspondence

The **Incoming Correspondence** tab 

opens (Figure-11) the "New Incoming Mail" dialogue.

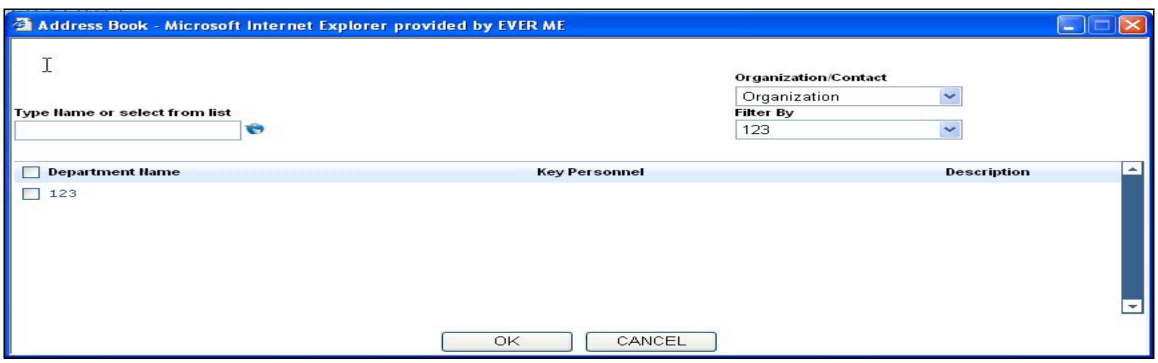


(Figure-11)

The Incoming Correspondence is a document of a specific type, delivered to a specific contact or a specific structure (Branch, Department, Division or Section) in an organization.
Below is the list of fields to be filled while registering an incoming mail:

- **From**: Sending Organization (Only external contacts can be selected for this field).
- **To**: Recipient of the correspondence. (Only internal contacts can be selected for this field).
- **CC:** Carbon copy of the correspondence to be sent.
- **Originally To:** If the correspondence is sent to a person other than the recipient.
- **Subject:** The subject of the mail.
- **Document Date**: Document Creation Date.
- **Received Date:** Date in which the business unit received the correspondence.
- **Document Reference:** The correspondence reference number.
- **Document Type:** Document type of the correspondence.
- **Delivery Mode:** The means used to deliver the correspondence.
- **Body:** Any comments the document controller needs to register for further clarifications on the correspondence.

The user has to go through the Address Book (Figure-12) to fill in "From", "To" and "Cc" fields to select a contact.



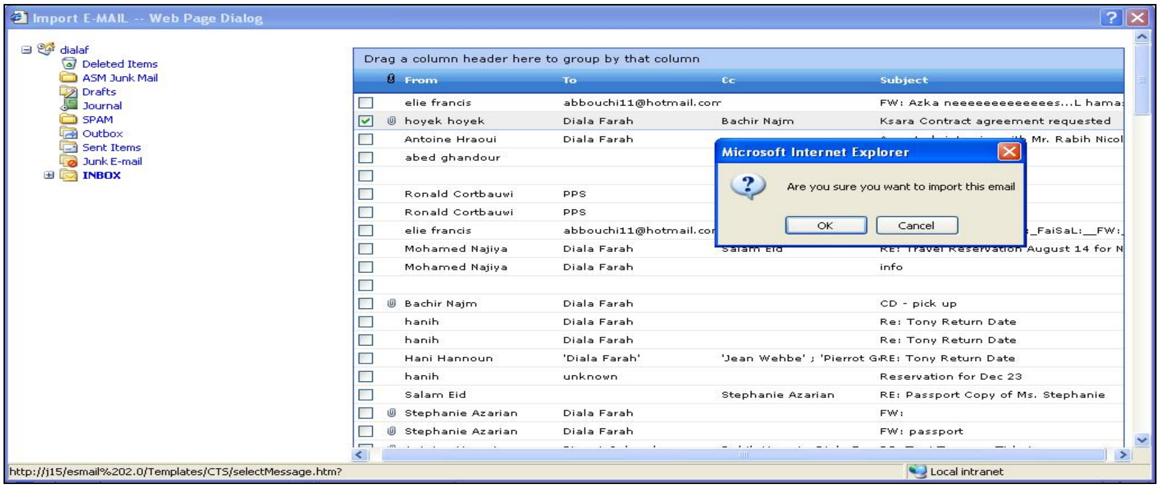
(Figure-12)

The save button saves the correspondent record.

The import from exchange button imports mails from outlook, the domain password is required (Figure-13).

(Figure-13)

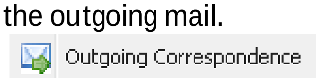
Then the user proceeds to check mails (Figure-14) that were loaded in the application and imports them subject to his confirmation.



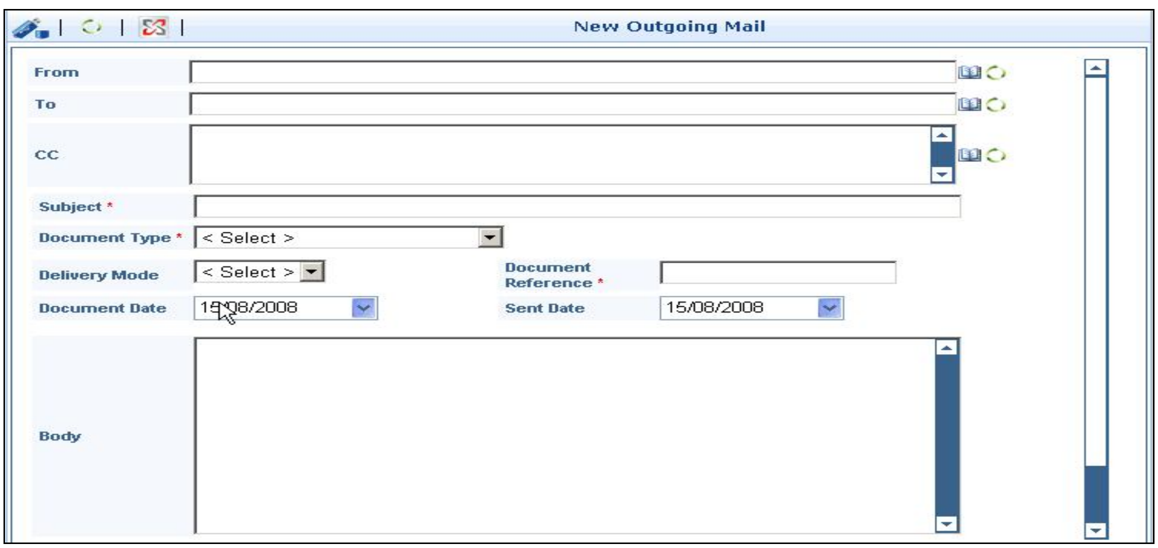
(Figure-14)

5.2 OUTGOING CORRESPONDENCE

The other type of correspondence is the outgoing mail.

The **Outgoing Correspondence** tab 

opens (Figure-15), the “New Outgoing Mail” dialogue.

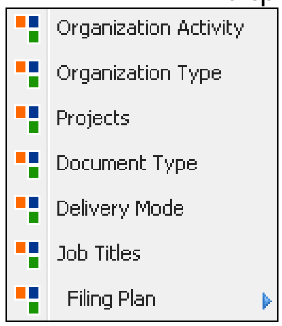


(Figure-15)

Refer to Section 5.1 “Incoming Correspondence” for detailed instructions.

6. MANAGEMENT CONSOLE

The management console consists of a list of manageable settings within the application. The **Management Console** tab Management Console displays the following list (Figure-16).

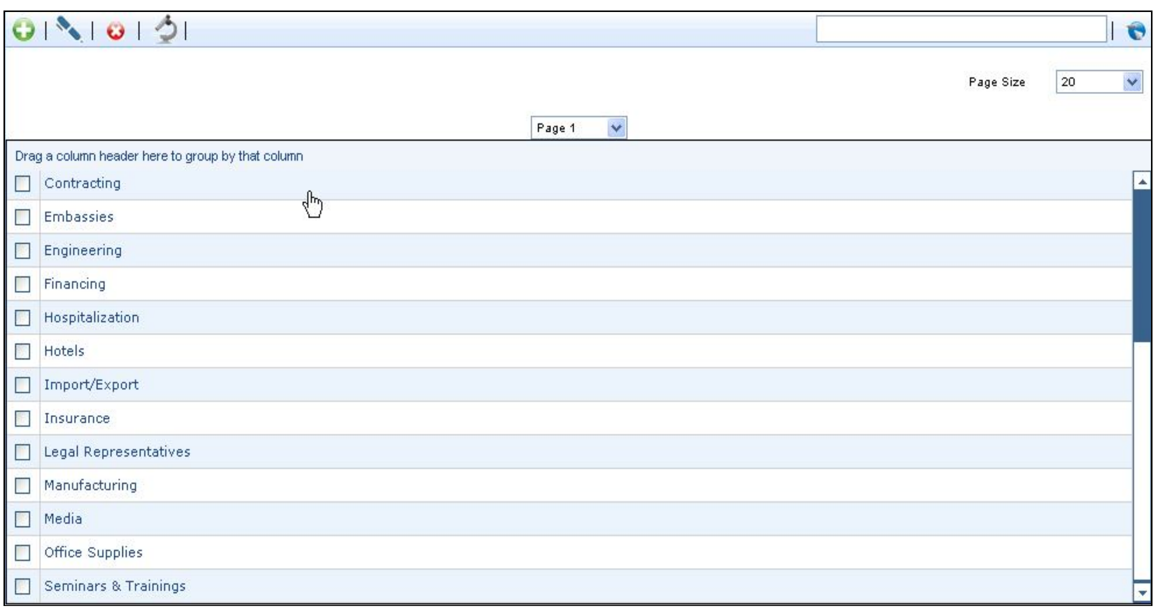


(Figure-16)

The management console allows the user to add/edit/delete/view any information in the following list: **Organization Activity, Organization Type, Document Type, Delivery Mode, Job Titles** and **Filling Plan.**

6.1 ORGANIZATION ACTIVITY

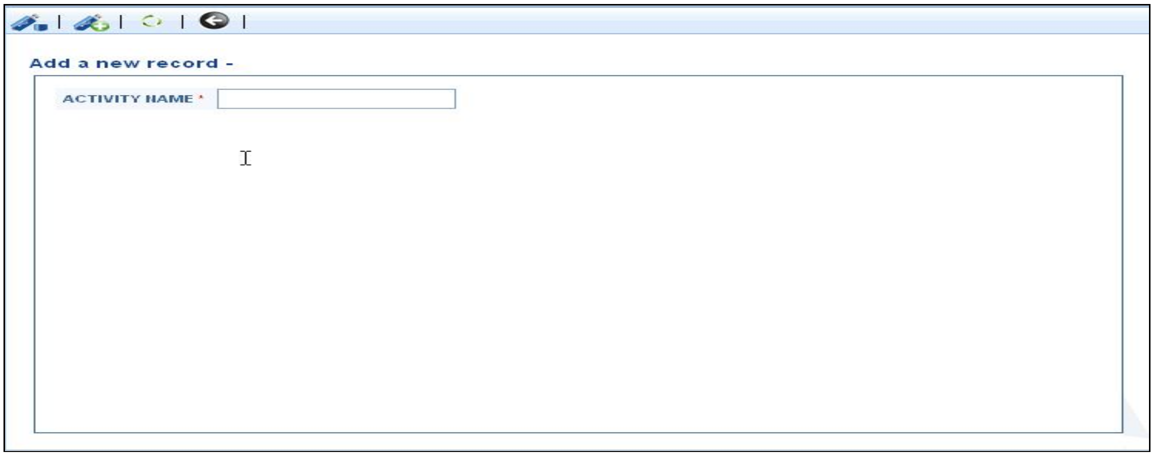
The Organization Activity Organization Activity section opens the following page (Figure-17).



(Figure-17)

6.1.1 Add a New Organization Activity

Click on the add button to add a new organization activity (Figure-18).



(Figure-18)

The records are saved after clicking the **Save** button.

6.1.2 Edit an Existing Organization Activity

Select an organization activity and click on the correspondent edit button to edit it (Figure-19).

(Figure-19)

The records are saved after clicking the **Save** button.

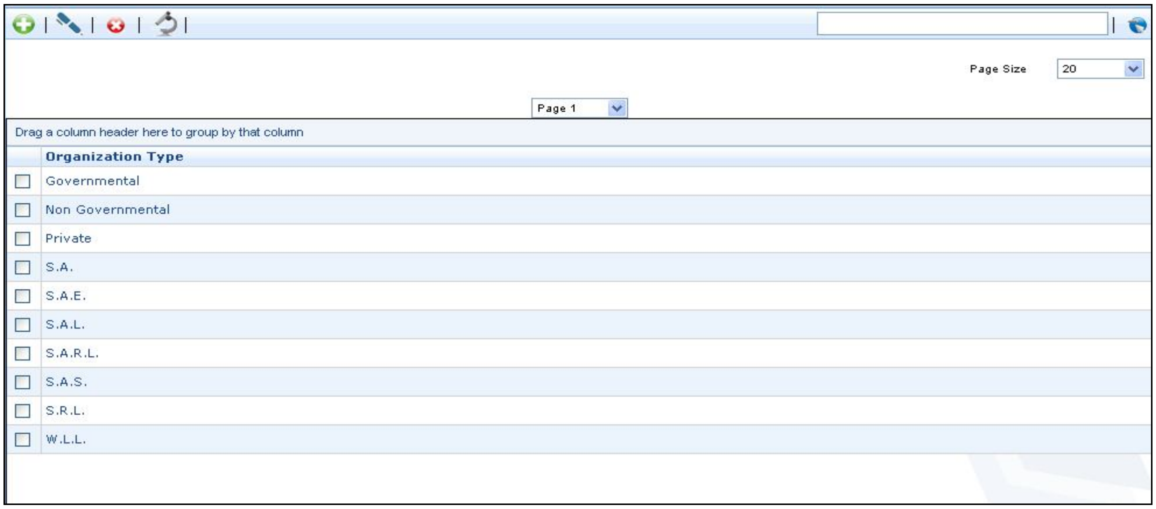
6.1.3 Delete an Existing Organization Activity

Select an organization activity and click on the correspondent delete button to delete it.

6.2 ORGANIZATION TYPE

The Organization Type 

opens the following page (Figure-20).



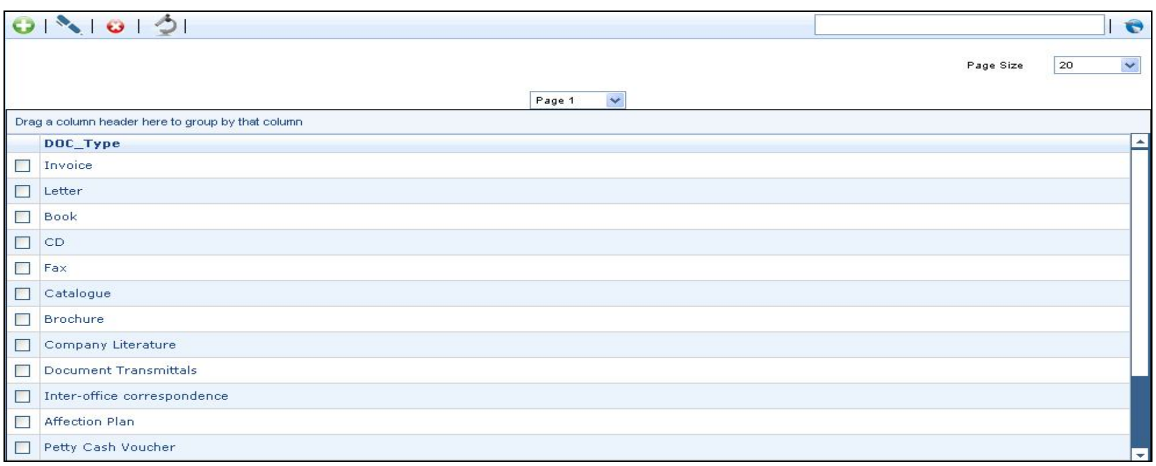
(Figure-20)

Refer to Section 6.1 "Organization Type" for detailed instructions.

6.3 DOCUMENT TYPE

The Document Type 

, opens the following page (Figure-21).

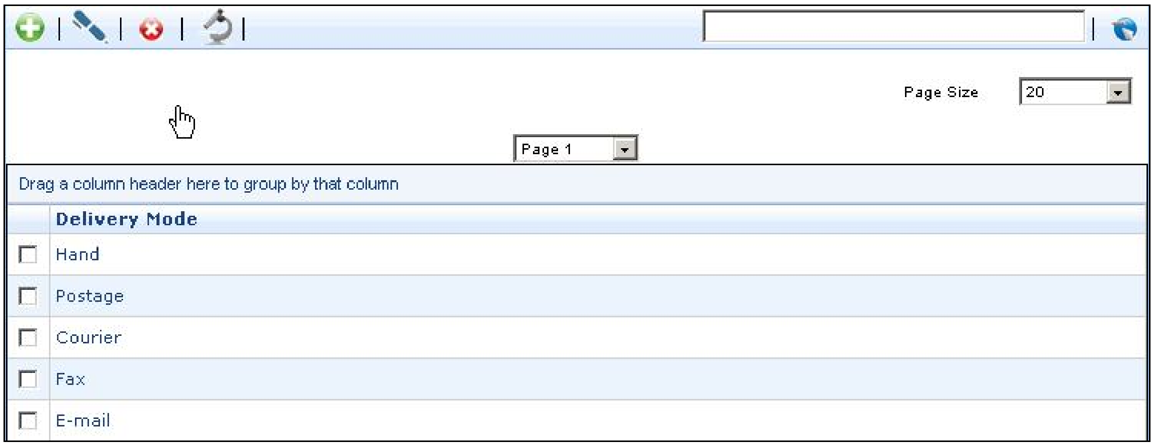


(Figure-21)

Refer to Section 6.1 "Organization Type" for detailed instructions.

6.4 Delivery Mode

The Delivery mode  opens the following page (Figure-22).

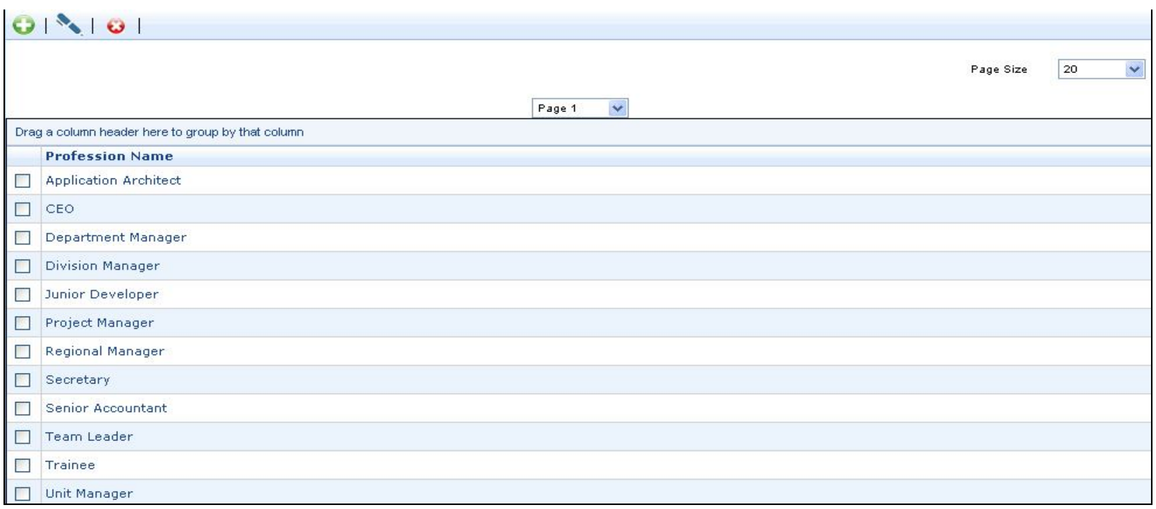


(Figure-22)

Refer to Section 6.1 "Organization Type" for detailed instructions.

6.5 Job Title

The Job Title  opens the following page (Figure-23).



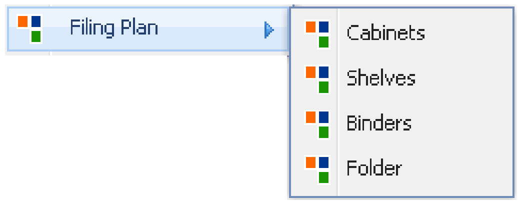
(Figure-23)

Refer to Section 6.1 "Organization Type" for detailed instructions.

6.6 Filing Plan

The filling plan is for organizing the user's folders for archiving purposes. It is configured by the users who have privileges to access the management console.

Upon clicking on the Filling Plan, the link will expand (Figure-25).

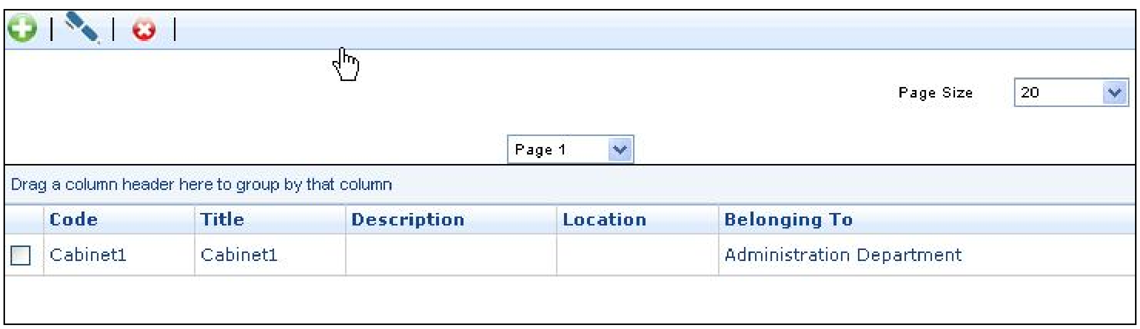


(Figure-24)

A cabinet must be created first in order to link shelves Binders and folders.

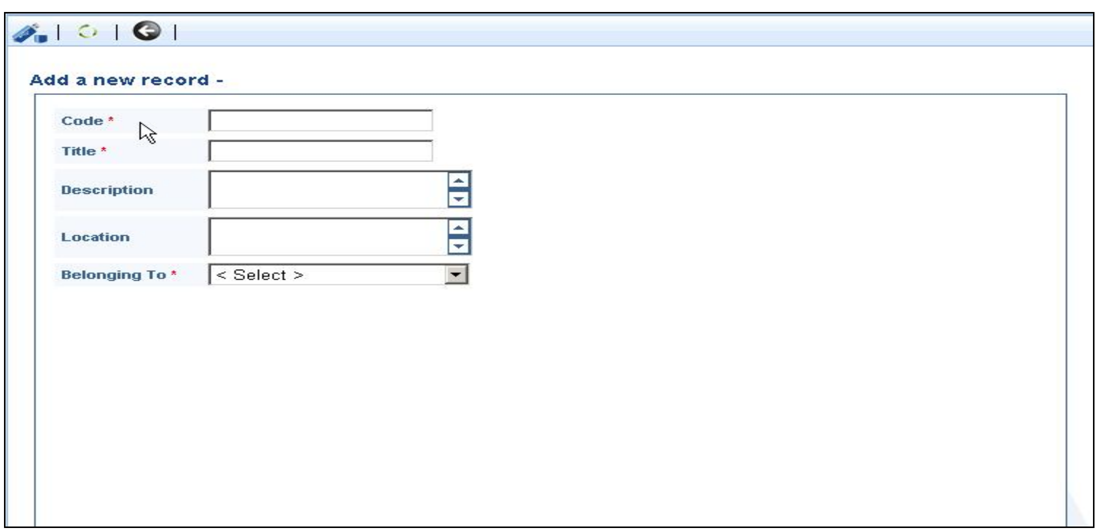
6.6.1 How to create a Cabinet

The **Cabinets** button opens the following page (Figure-25).



(Figure-25)

Click on the add button to create a new cabinet (Figure-26).



(Figure-26)

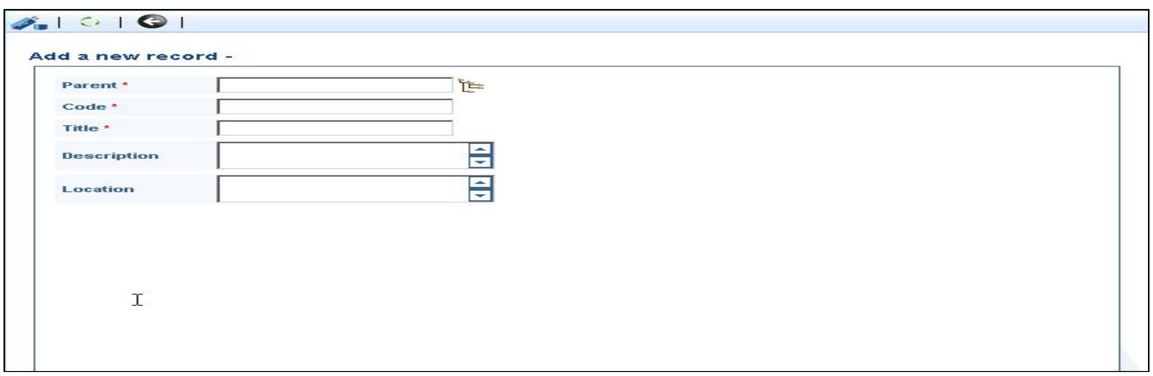
Below is the list of fields to be filled

- **Code:** The ordering system used by the unit to organize and manage documents.
- **Title:** The name of the cabinet.
- **Description:** A brief description about the cabinet being used for storage.
- **Location:** Where is this cabinet located?
- **Belonging to:** The business unit this cabinet belongs to. This is a very important step in registering a cabinet. All the users registered under the business unit where the cabinet is created, will have access to this cabinet.

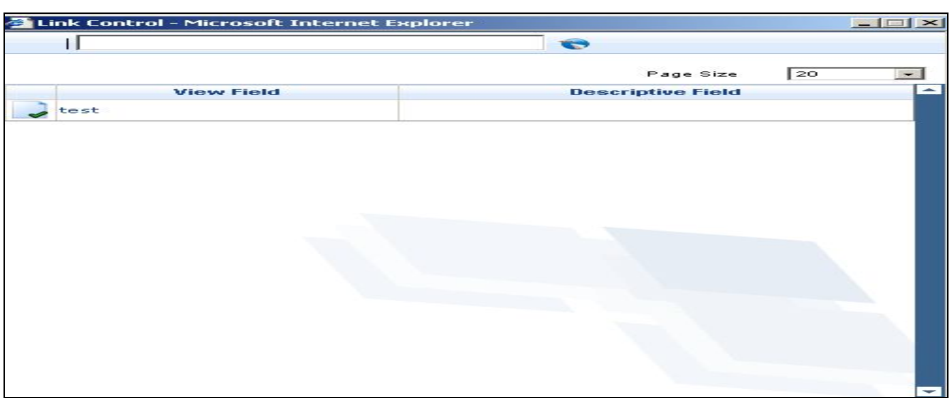
The records are saved after clicking the **Save** button.

6.6.2 How to create Shelves, Binders and Folders

Shelves, Binders and Folders configure easily once the PARENT cabinet is created.
Refer to Section 6.6.1 "How to Create a Cabinet" for detailed instructions, with the following exceptions.
All what needs to be done is simply select Shelves, Binders or Folders from the console and link it to a parent cabinet by pressing the link control button in (Figure-27), a Link Control window will open (Figure-28) allowing the user to choose the cabinet to which he wants to link his Shelf, Binder or Folder.



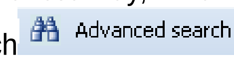
(Figure-27)



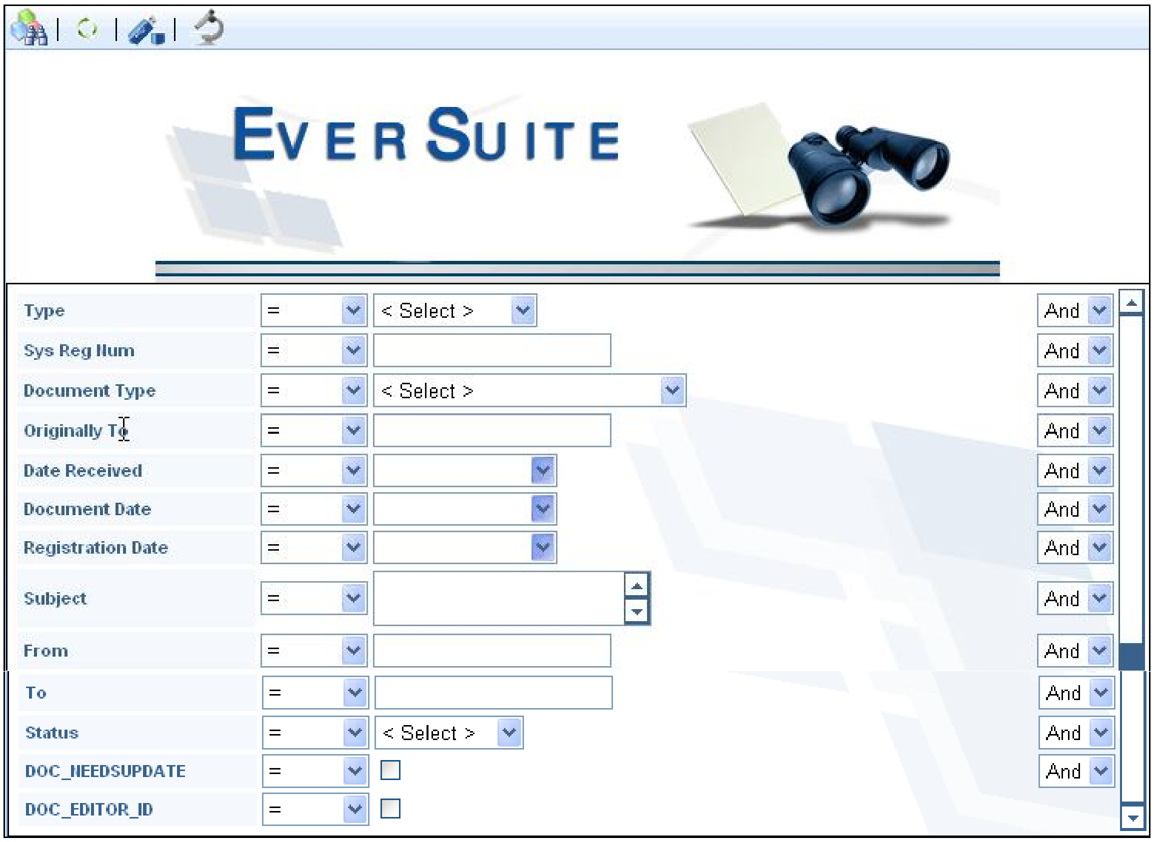
(Figure-28)

7. ADVANCED SEARCH

Another tool that the user has is the advanced search; the advanced search has the ability to search in a more advanced way, which means that it can search field by field.

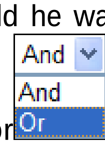
The Advanced Search 

tab, opens the following page (Figure-29).



(Figure-29)

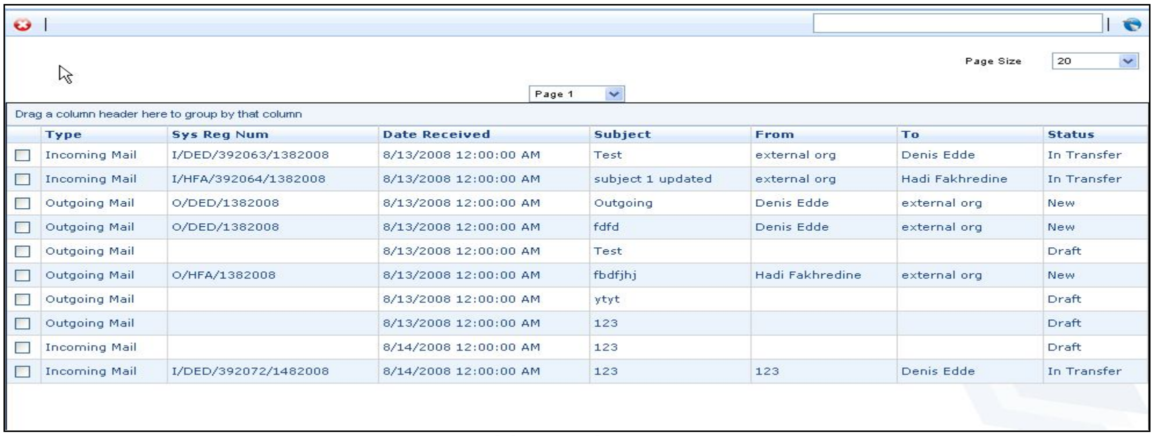
The user selects the field he wants to search for from the lists 

, and then select the logical operator 

.

Fields are cleared by clicking on the Reset button .

The Execute Query button opens the listing page (Figure-30), showing all the items matching the search criteria.



Page Size 20

Page 1

Drag a column header here to group by that column

Type	Sys Reg Num	Date Received	Subject	From	To	Status
Incoming Mail	I/DED/392063/1382008	8/13/2008 12:00:00 AM	Test	external org	Denis Edde	In Transfer
Incoming Mail	I/HFA/392064/1382008	8/13/2008 12:00:00 AM	subject 1 updated	external org	Hadi Fakhredine	In Transfer
Outgoing Mail	O/DED/1382008	8/13/2008 12:00:00 AM	Outgoing	Denis Edde	external org	New
Outgoing Mail	O/DED/1382008	8/13/2008 12:00:00 AM	fdfd	Denis Edde	external org	New
Outgoing Mail		8/13/2008 12:00:00 AM	Test			Draft
Outgoing Mail	O/HFA/1382008	8/13/2008 12:00:00 AM	fbdfjhj	Hadi Fakhredine	external org	New
Outgoing Mail		8/13/2008 12:00:00 AM	ytyt			Draft
Outgoing Mail		8/13/2008 12:00:00 AM	123			Draft
Incoming Mail		8/14/2008 12:00:00 AM	123			Draft
Incoming Mail	I/DED/392072/1482008	8/14/2008 12:00:00 AM	123	123	Denis Edde	In Transfer

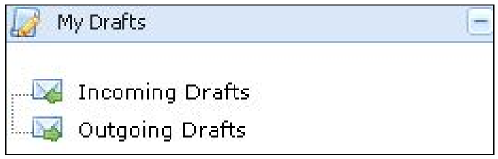
(Figure-30)

8. My Drafts

My Drafts shows the incoming and outgoing correspondences that are still not sent. Those correspondences are saved in My Drafts.

My Drafts tab 

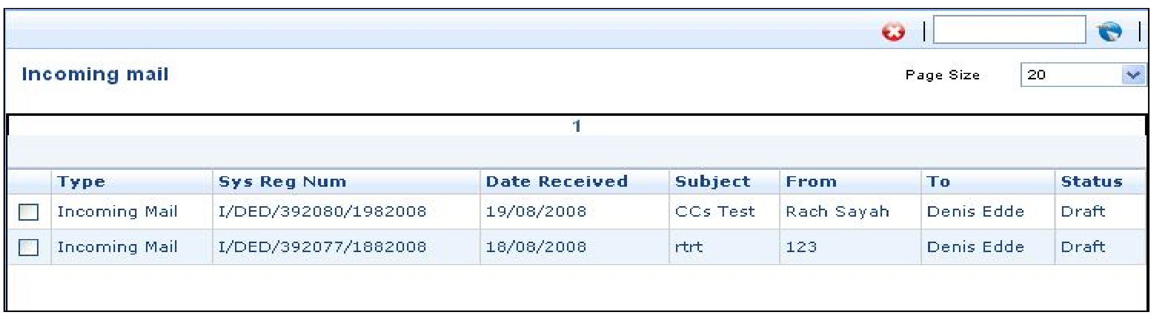
at the left corner of the home page, displays both the incoming and outgoing Drafts for the logged in user (Figure-31).



(Figure-31)

8.1 Incoming Drafts

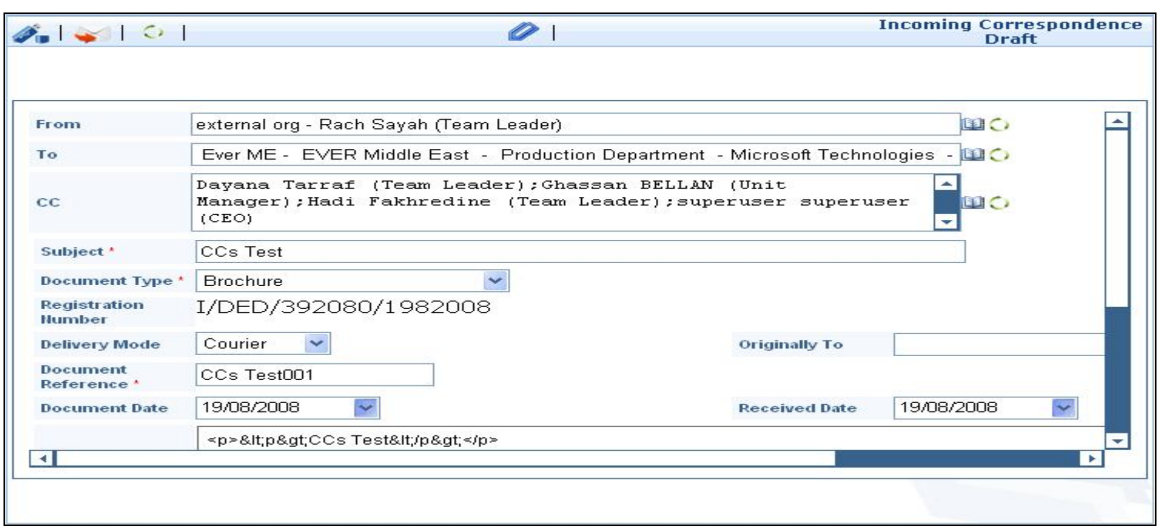
The **Incoming Drafts** tab opens the following page (Figure-33).



	Type	Sys Reg Num	Date Received	Subject	From	To	Status
☐	Incoming Mail	I/DED/392080/1982008	19/08/2008	CCs Test	Rach Sayah	Denis Edde	Draft
☐	Incoming Mail	I/DED/392077/1882008	18/08/2008	rtrt	123	Denis Edde	Draft

(Figure-32)

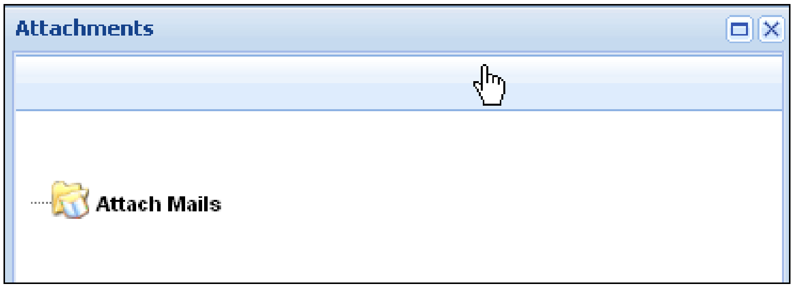
By double clicking on a row, the correspondence details will open. The user will be able to edit records and resend the correspondence (Figure-33).



(Figure-33)

8.1.1 ATTACHMENT

The attach button opens the following page (Figure-34).

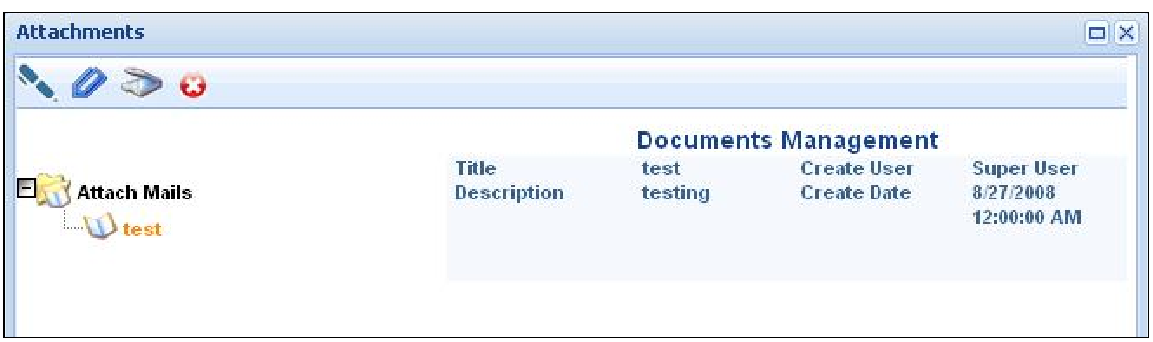


(Figure-34)

Click on the Attach Mail, the add button will appear in order to be able to add a new document (Figure-35)

(Figure-35)

The records are saved after clicking the **Save** button.

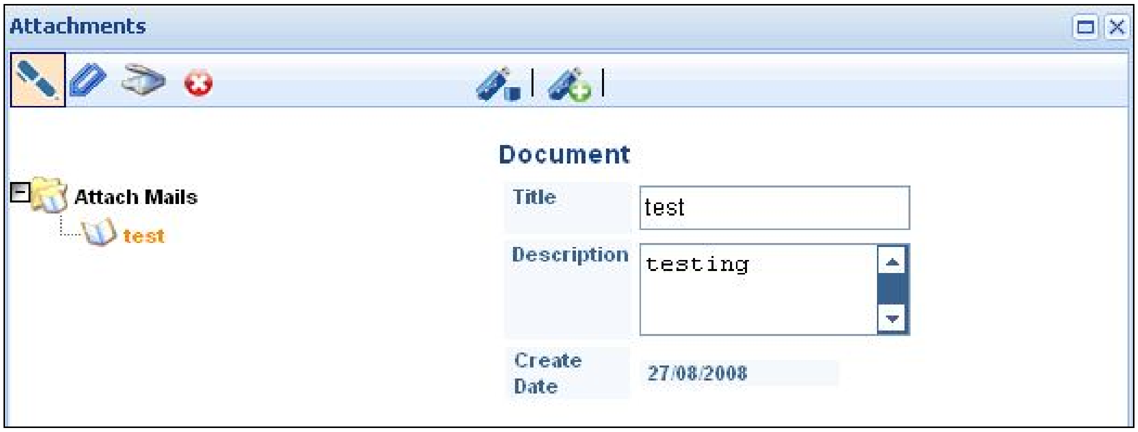


(Figure-36)

8.1.1.1 EDIT DOCUMENT

Click on Edit button to edit the document (Figure-37).

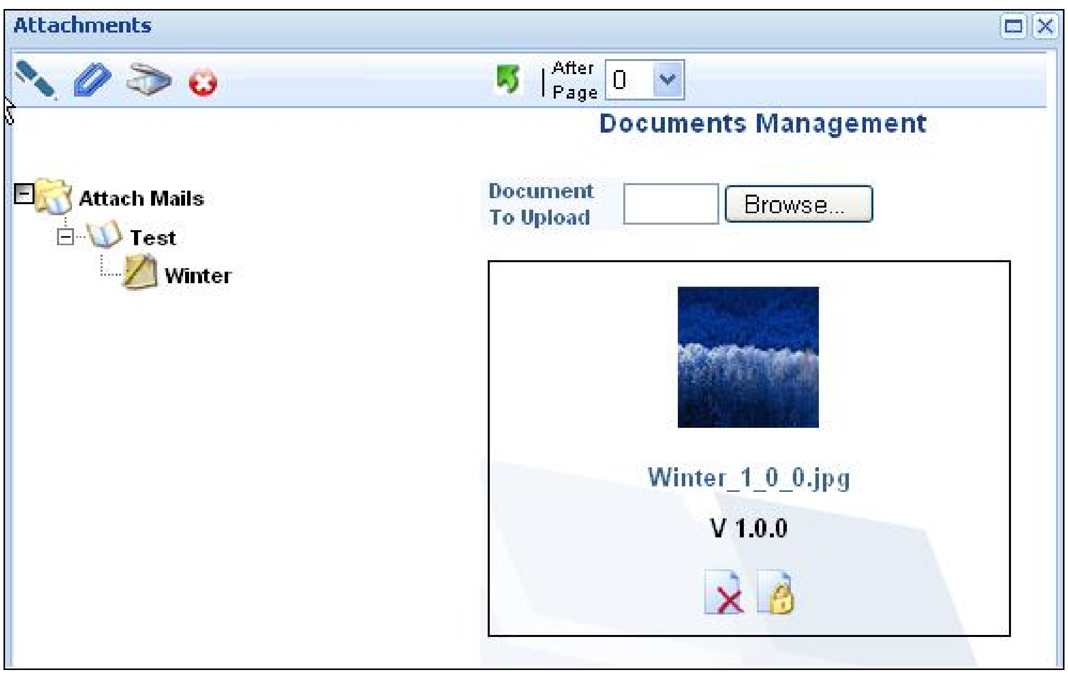
The records are saved after clicking the **Save** button.



(Figure-37)

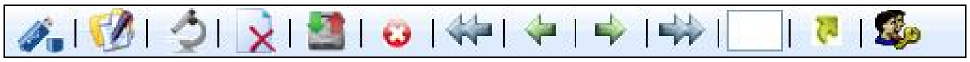
8.1.1.2 ATTACH DOCUMENT

The user can browse a file via Browse... then click the upload button (Figure-38).



(Figure-38)

By clicking on the link of the document uploaded the following toolbar will appear. The user can store, change name, view the image annotations, close document and exit, delete, go first, go first, go previous, go first, go previous, go next, go last, go to and set the annotation security (Figure-39).



(Figure-39)

8.1.1.3 Documents Versioning

The ES-DMS documents versioning operate on three levels (Major, Minor and Modification). This versioning system allows the user to keep track of all the old versions in a history context which provides the user with the ability to return back to any version of the documents.
The Version of a document in ES-DMS takes this format "1_0_0" (The first version number given to a captured document). The first number represents the Major Version number of the document; the second number represents the Minor Version number while the third and final number in the series represents the Modification version number of the document. The numeric values in the version of a document enable the users to keep track of the number of modifications that has been made to the document on all levels (Major, Minor and Modification).
The ES-DMS versioning system can be managed by the user (using the standard ES-DMS versioning commands) or automatically by the system according to the context. Please refer to The Security Section in The ES-DMS Management Console Section for more information on how to assign commands permissions for groups and users.

The document processing interface (Deleting and locking document)

The document processing interface (Versions handling)

8.1.1.3.1 Major Versioning (MAJ)

The major level version of a document can be used to keep track of complete changes in the document attached, in other words, a new document version. It is represented by the command icon shown below.

The Button is the Major Level Versioning Command.

This level of document is usually handled and decided upon by the user. In order for the user to change the major version of the file he has to capture a new file and click the Major Level Versioning Command. The system will then handle the creation of the new document version.

8.1.1.3.2 Minor Versioning (MIN)

The minor level version of a document can be used to keep track of minor changes in the document attached in other word it is a new release of the document. It is represented by the command icon shown below.

The Button is the Minor Level Versioning Command

This level of document is usually handled and decided upon by the user. In order for the user to change the minor version of the file he has to capture a new file and click the Minor Level Versioning Command. The system will then handle the creation of the new document version.

8.1.1.3.3 Modification Versioning (MDF)

The modification level version of a document can be used to keep track of small changes applied on the document attached. It is represented by the icon shown below.

The Button is the Modification Level Versioning Command

This level of document is usually handled and decided upon by the user or system. Editing or annotating a document is considered as small modifications made to the original file. Therefore; saving such changes will automatically create a modification version of the document (Handled automatically by the ES-DMS Core System).

In the other hand a user can manually create a modification version of the document by capturing a new file and clicking the Modification Level Versioning Command. The system will then handle the creation of the new document version.

8.1.1.3.4 Document Overwriting

The Document Overwriting API enables the user to overwrite the physical document of the document without creating a new version of the document. The Document Overwriting Command is represented by the icon shown below.

The Button is the Document Overwriting Command.

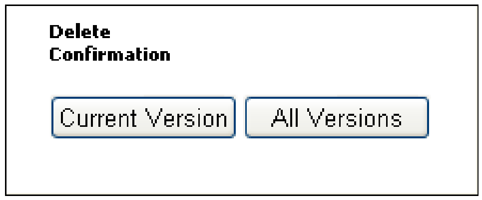
The Document Overwriting enables the user to capture a new document and overwrite the original physical file of the document with the newly captured document without creating a new version of the document.

8.1.1.3.5 File Deleting

The File Deleting will enable the user to delete the files upon deleting a message will ask the user in order to delete the current version or all the versions of that document.

The Button is the File Delete Button.

Upon clicking, a message will pop up, which asks the user whether to delete all the versions or just the current version.



8.1.1.4 Document Sharing

The ES-DMS enables user to share documents online and offline across multiple projects in the EverSuite Enterprise Content Infrastructure.

8.1.1.4.1 Checking Out Document

Once a user request a document for viewing, printing or editing, it is considered to be checked out of the system. Checking out a document will disable all versioning, viewing and editing functions of the document until the document is checked in again to the system. The ES-DMS also keep track of the user that checked out the document until he checked it in.

8.1.1.4.2 Checking In Document

Once the user finishes his viewing or editing procedures on the document the system will automatically check in the document by removing the trace of the user holding the document. Now the document will be available again for other users to view or edit.

8.1.1.4.3 Locking Document

By locking a document the ES-DMS system will disable all document functionalities like versioning or editing. Therefore; the only operations that can be performed on the document is the printing functionality of ES-DMS according to the user logged in to the ES-DMS project. Please refer to The Security Section in The ES-DMS Management Console Section for more information on how to assign commands permissions for groups and users. The Document Locking and Unlocking Commands are represented by the icons shown below.

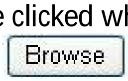
The document processing interface (Locking document)

The document processing interface (Unlocking Document)

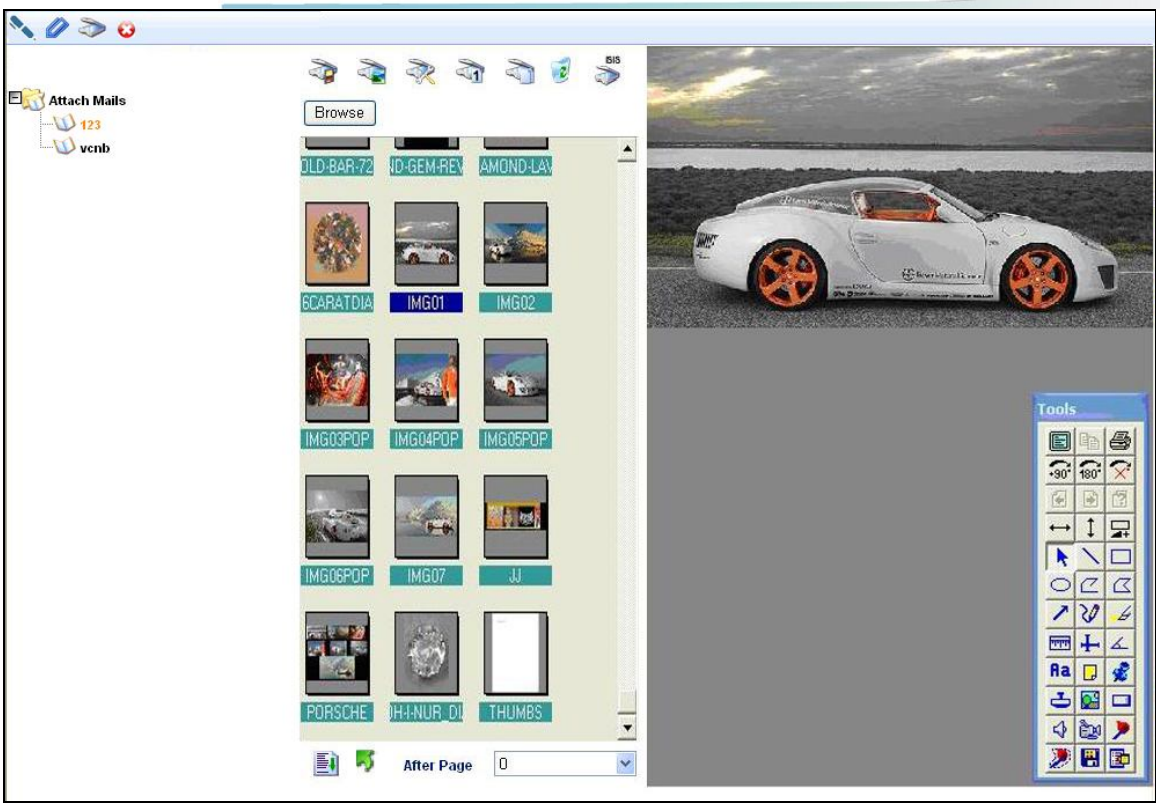
The  Button is the Document Locking Command.

The  Button is the Document Unlocking Command.

8.1.1.5 SCANNING DOCUMENT

The Scanning Interface enables the user to scan documents once the file is selected the  button must be clicked which will open the following interface. In order to scan the files the browse button 

must be clicked and the user selects the folder and all the files found in that folder will be populated in the list below and once the user clicks on a file, the file will be opened on the right hand side.
The buttons found below are:



(Figure-40)

The button is for selecting the driver of the scanner to scan with.

The button is for configuring the scanner options.

The buttons are similar to one another. It will let the user to put the scanning parameters.

The button enables the user to choose the coloring options of the scanner.

The Empty Tray button will empty the list found in the figure above and will delete the files from their original location.

The button shown in the figure above will select all the files that are found in the tray in case the user wants to upload all the files.

The Upload Button will upload the selected file.

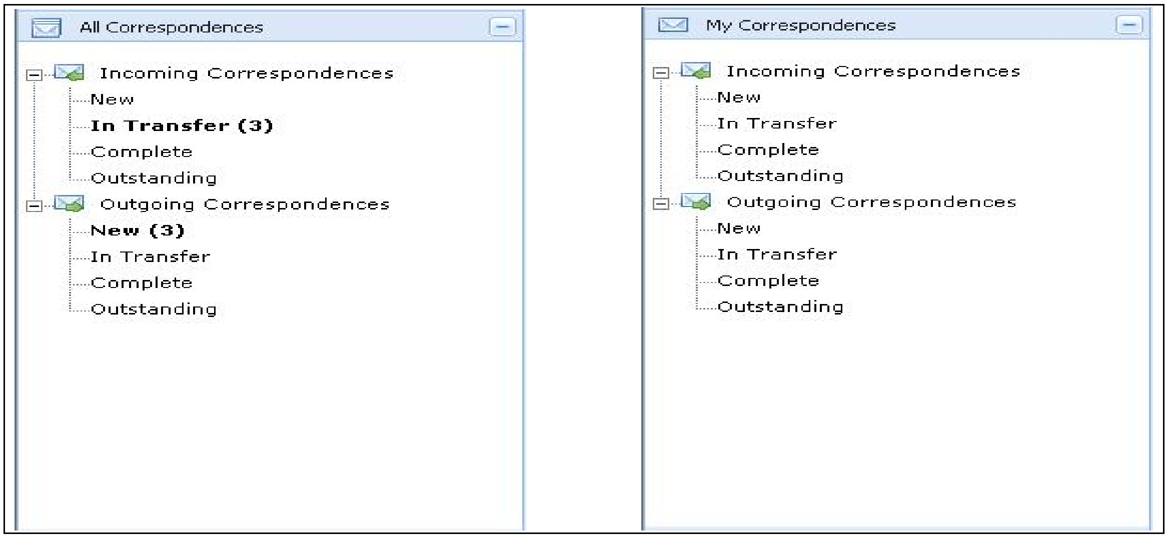
The after Page Dropdown list After Page 0 will give the user the possibility to choose after which file the new file will be positioned.

8.2 Outgoing Drafts

Refer to Section 8.1 "Incoming Draft" for detailed instructions.

9. All Correspondences and My Correspondences

Two columns appear at the left corner. One column is the "All Correspondences" Column, and the other one is the "My Correspondences" Column (Figure-41).



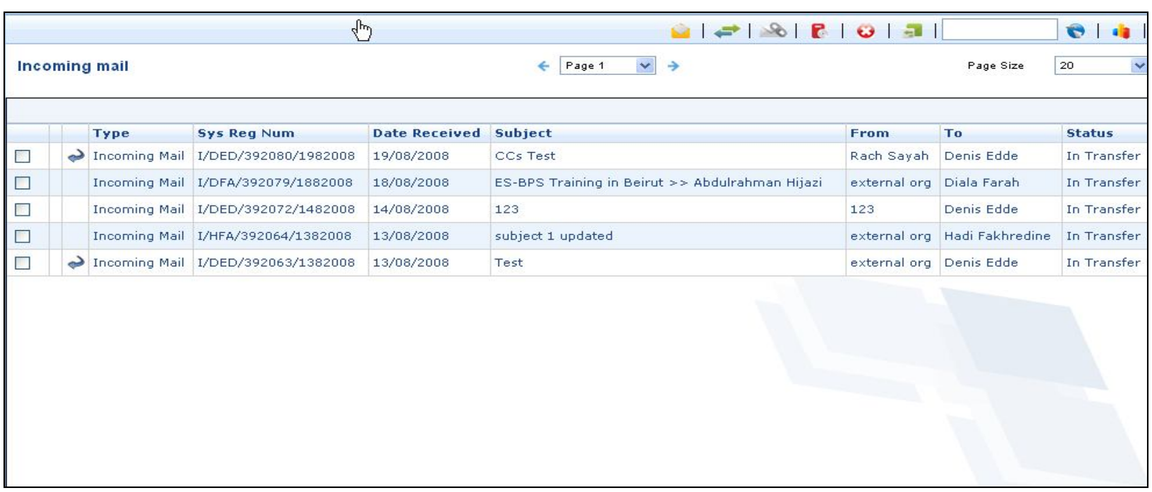
(Figure-41)

The "All Correspondences" shows all the mails with different statuses. While the "My Correspondences" will show the mails of the user logged in.

The Statistics contains the following statuses:

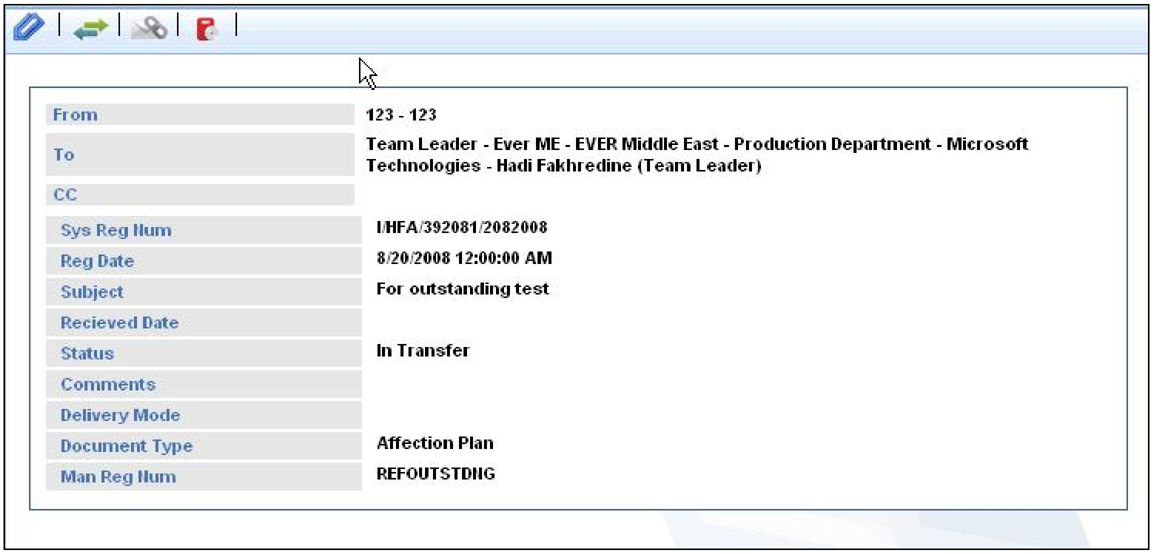
- **New**: Shows all new mails.
- **In Transfer**: Shows all the mails in transfer.
- **Complete**: Shows the complete mails.
- **Outstanding**: Shows the mails which passed due date.

Upon clicking on the number of mails, the list will be populated (Figure-42)



(Figure-42)

Double click a selected row to view the correspondence details (Figure-43)



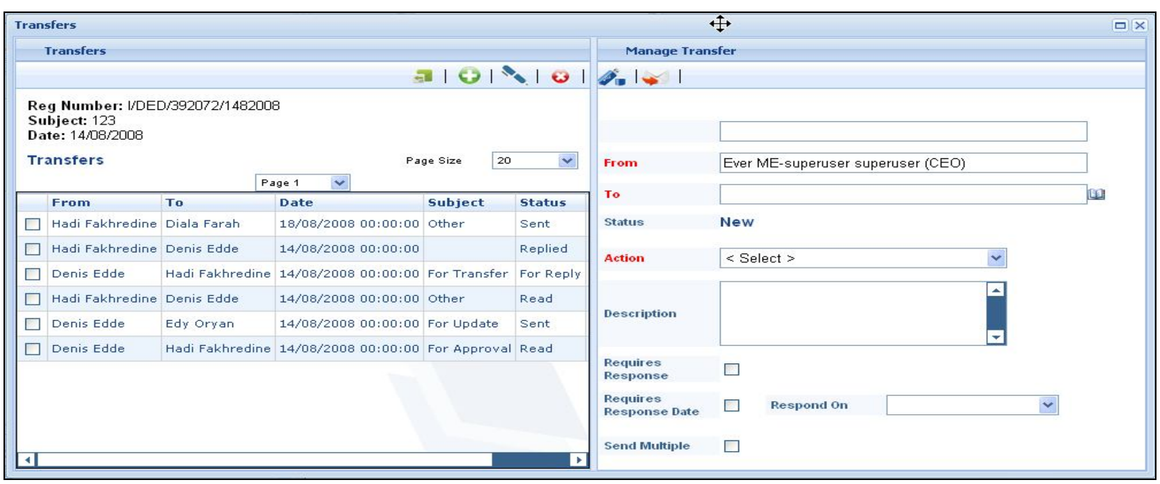
(Figure-43)

9.1 COMPLETE

A new correspondence passes through three different stages of status while transferred:
New – In Transfer – Complete.
Each new added Incoming/Outgoing mail is saved with status “New”. Therefore when the complete button is pressed the status of the mail is changed from “New” to “Complete” and the correspondence is ready to be archived.
Only the user who initially received the correspondence can complete it.

9.2 TRANSFER

Click the Transfer button and the following window will pop-up (Figure-44)



(Figure-44)

The left frame shows the list of transfers whereas the right frame allows the user to add a new transfer.
The “**From**” field is automatically filled by the user’s name, while the user can go through the address book to fill the “**To**” field (Figure-45).

(Figure-45)

Select the type of action expected from the transfer (ex: for approval, for transfer, prepare outgoing mail, to be returned, other).

Once the “Requires Response” checked, the recipient is obliged to response.

Once the “Requires Response date” checked, the recipient is obliged to respond before the date mentioned in “Respond On” .

To send several transfers to several contacts, check “Send Multiple” .

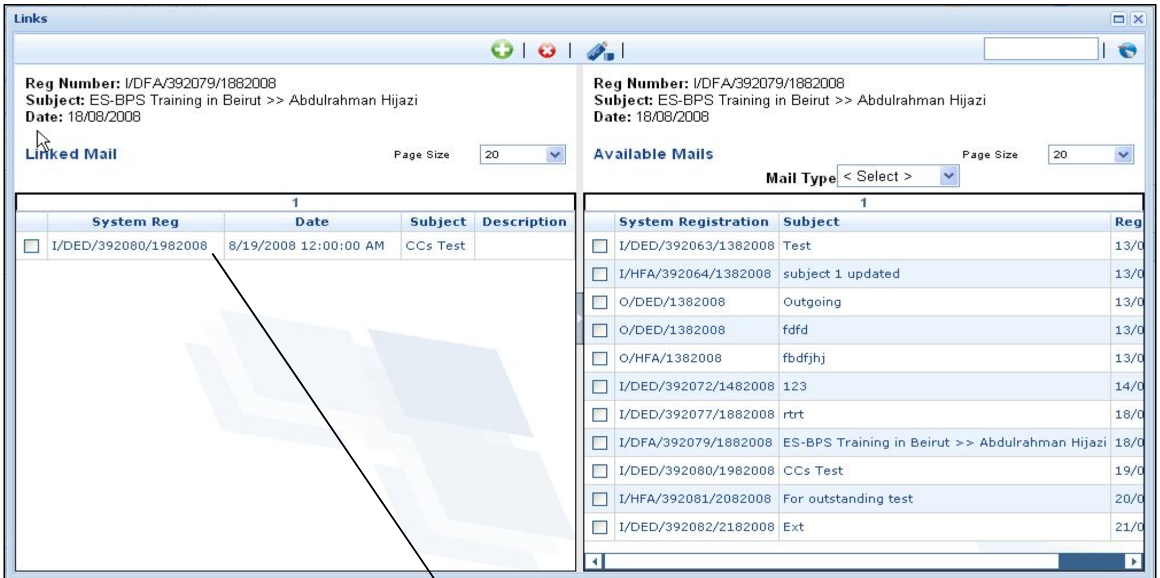
After adding the new transfer, the user has two choices:

1- Save the transfer with a status pending by clicking the Save button. The record could be updated.
2- By clicking the Send button, the left frame will be refreshed with a view of the newly created record.

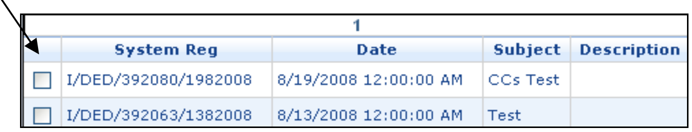
Once the transfer is created, only the people addressed can reply to it.

9.3 LINK

The link button enables the user to link several mails to one another. So upon clicking on the Link button, the following page will pop-up (Figure-46).



(Figure-46)



System Reg	Date	Subject	Description
I/DED/392080/1982008	8/19/2008 12:00:00 AM	CCs Test	
I/DED/392063/1382008	8/13/2008 12:00:00 AM	Test	

(Figure-47)

On the top of the left frame, the user can view:

- **Reg. Number**: Ex: O/TDG/TW/PA/2/12112007
- **Subject**
- **Date**

Click the Add button and a list of mails will be displayed on the right frame from which you can select mails and link to the specified correspondence.

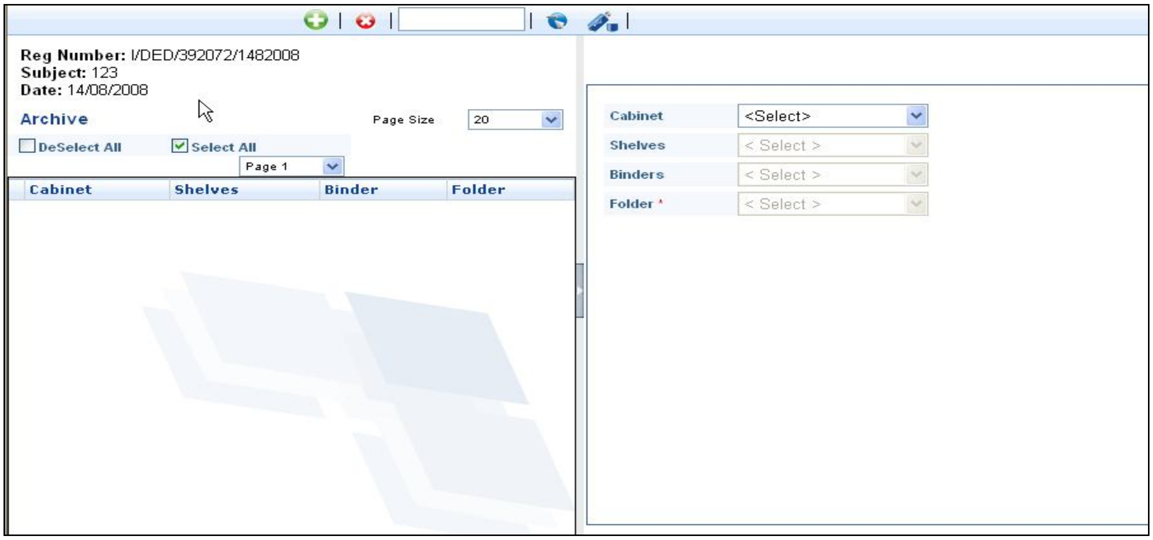
Select the mail to be linked and click the save button. The left frame will be refreshed with the newly linked correspondence (Figures-47).

Click on the Delete button to delete the linked mail.

Another way to search for a correspondence to link to the specified one is via the simple text search field located on the upper right frame.

9.4 ARCHIVE

By clicking on the Archive button a storage area that reflects the centralized location will appear (Figure-48).



(Figure-48)

The Add button will open a page on the right frame, with four storage locations: Cabinets, Shelves, Binders and Folders.

The user can archive his correspondences in Cabinets, Shelves, Binders and Folders.
For this functionality the user can add/edit/delete a new Cabinet. Under the Cabinet he can add/edit/delete a new Shelve. Under the Shelve he cans add/edit/delete a new Binder. Under the Binder he can add/edit/delete a new Folder.

When a correspondence is complete (status = "Complete"), the user can archive it in any folder he creates. Then the correspondence will only be viewable under its archived folder.
Automatic archiving properties should be added so each correspondence, with "Complete" status, can be archived automatically after a period of time chosen by the user.

Upon selecting the right storage location, and by clicking on the save button, the list on the left frame will be populated with the saved correspondence.

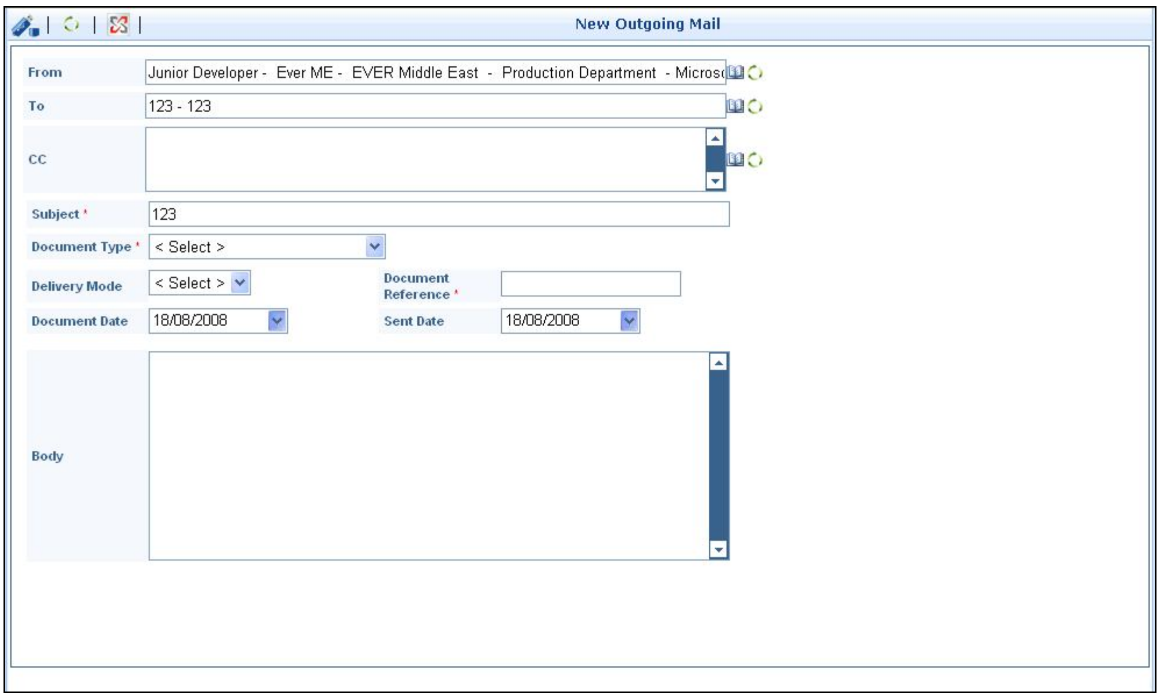
Click on the Delete button to delete the Archive location.

9.5 DELETE

Select a row from the list by clicking the Check Box next to every record, and then click the delete button to delete the record.

9.6 REPLY TO

The reply action opens a new outgoing mail with the **From** and **To** fields of the original correspondence (Figure-49). Each replied correspondence should be linked to the original one.



(Figure-49)

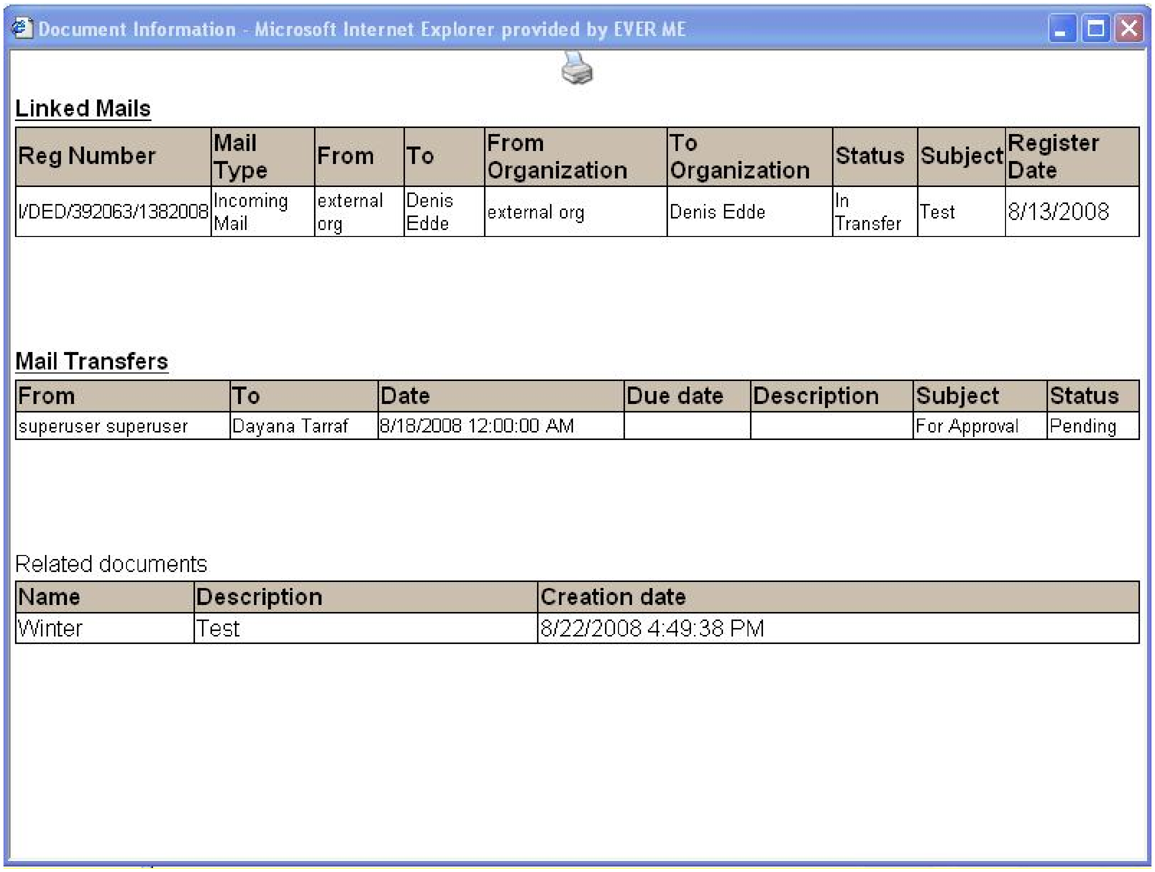
The import from exchange button imports mails from Outlook.
Refer to Section 5.1 "Incoming Correspondence" for detailed instructions.

9.7 SEARCH

It is a search tool, where the user enters a free text and clicks on the search button . Upon clicking on the search button, the list will be populated with the new results.

9.8 TRACK

Click on the track button, to get a full report about all actions that the correspondence was exposed to (Figure-50).


Document Information - Microsoft Internet Explorer provided by EVER ME

Linked Mails

Reg Number	Mail Type	From	To	From Organization	To Organization	Status	Subject	Register Date
I/DED/392063/1382008	Incoming Mail	external org	Denis Edde	external org	Denis Edde	In Transfer	Test	8/13/2008

Mail Transfers

From	To	Date	Due date	Description	Subject	Status
superuser superuser	Dayana Tarraf	8/18/2008 12:00:00 AM			For Approval	Pending

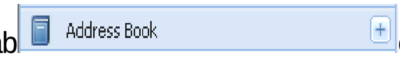
Related documents

Name	Description	Creation date
Winter	Test	8/22/2008 4:49:38 PM

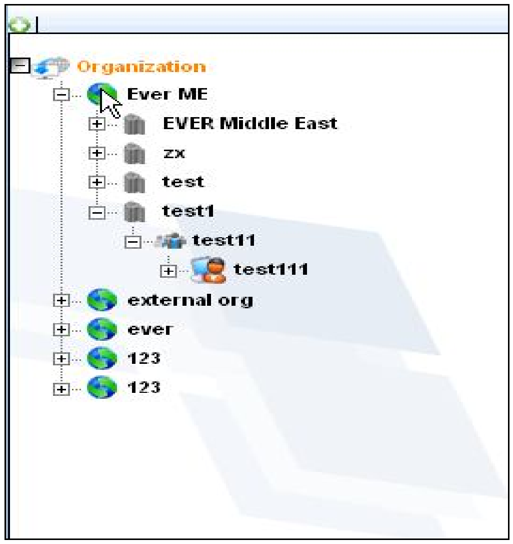
(Figure-50)

The user can track and print a correspondence by pressing the print button .

10. ADDRESS BOOK

The **Address Book** tab 

opens the following page (Figure-52).



(Figure-51)

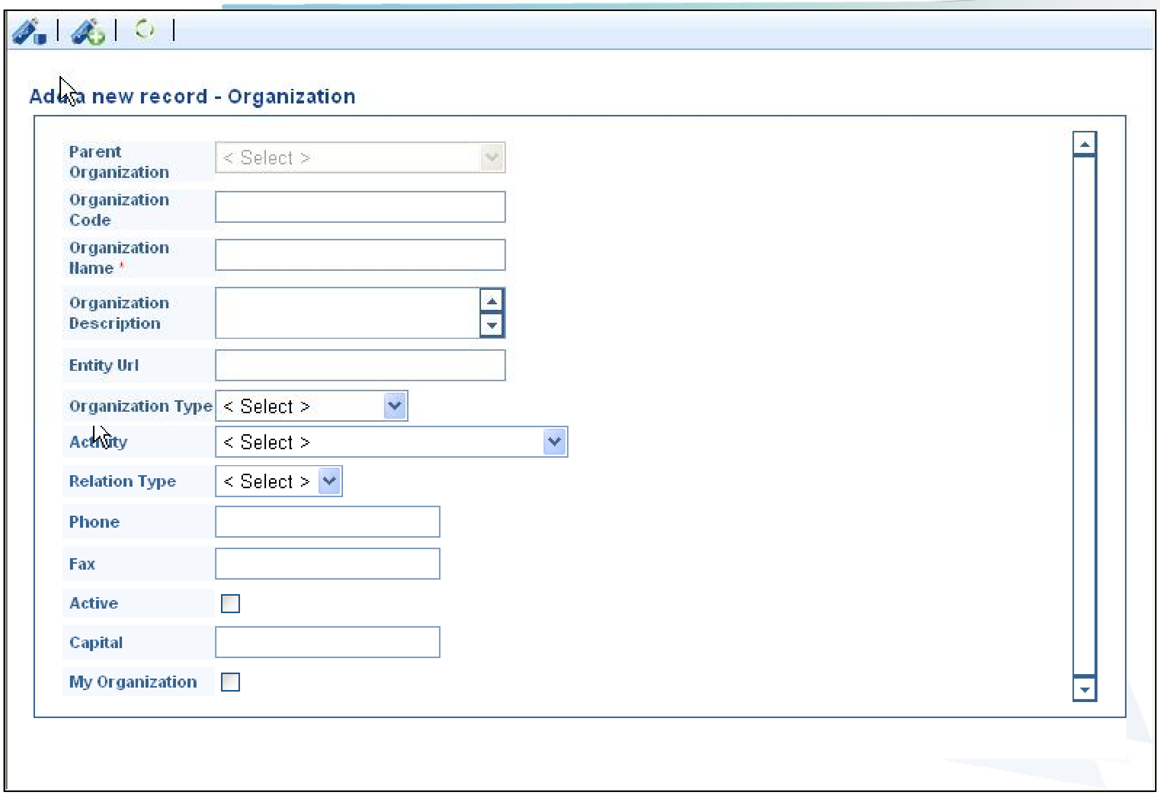
10.1 ORGANIZATION

An organization can have different branches and each branch is structured differently as follows: Branch, Department, Division, and Section.
This module is interrelated because each contact in an organization can belong to a specific branch, department, division or section. Therefore while adding a new contact the user must choose to which structure of an organization this contact belongs to.
On clicking the Organization, the list of organization and the departments under it can be displayed as shown above in Figure-51.

10.1.1 ADDING / EDITING AN ORGANIZATION

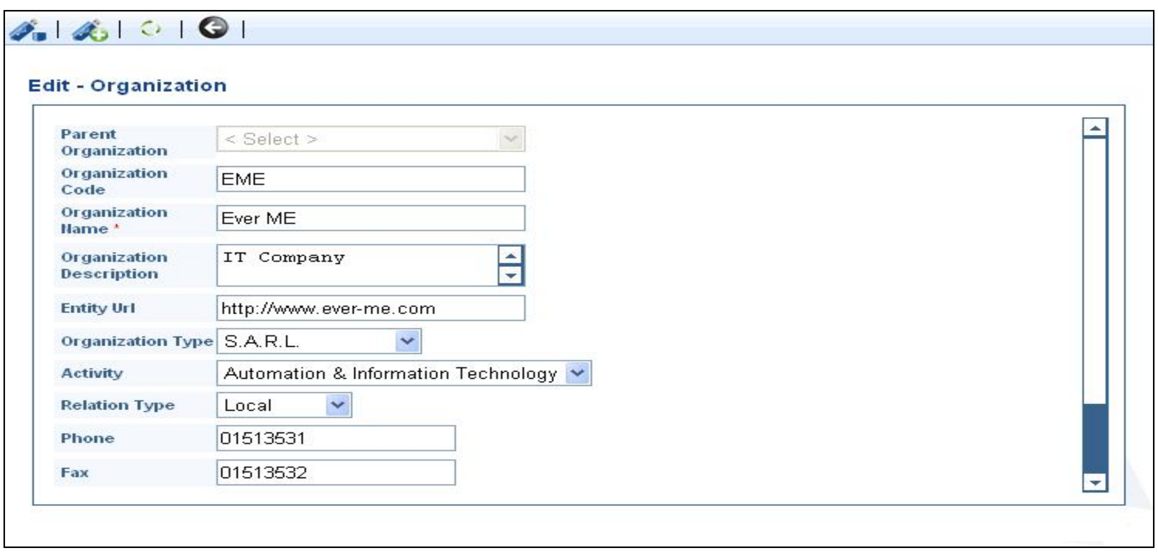
The Organization tree is set of all organization; each organization has logins.

Click on **Organization**, the add button  will appear in order to be able to add a new organization (Figure-52)



(Figure-52)

On clicking the button, the Organization record is displayed in edit mode (Figure-53).



(Figure-53)

The records are saved after clicking the **Save** button.

10.1.2 Adding / Editing a Branch

After creating a new organization the user can add a new branch for this organization.
Refer to Section 10.1.1 "Adding/Editing an Organization" for detailed instructions.

10.1.3 Adding / Editing a Department

After creating a new branch the user can add a new department to that branch
Refer to Section 10.1.1 "Adding/Editing an Organization" for detailed instructions.

10.1.4 Adding / Editing a Division

After creating a new department the user can add a new division to that department.
Refer to Section 10.1.1 "Adding/Editing an Organization" for detailed instructions.

10.1.5 Adding / Editing a Section

After creating a new division the user can add a new section to that division.
Refer to Section 10.1.1 "Adding/Editing an Organization" for detailed instructions.

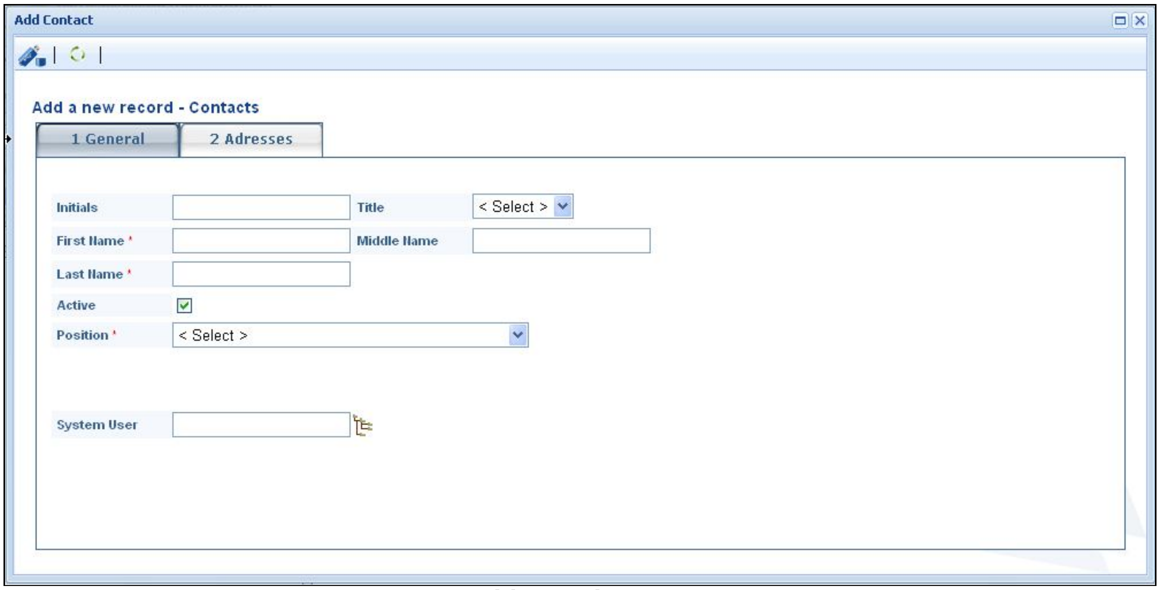
10.2 Contact

A contact is an individual belonging to an organization structure (department, division or section).
Once the User selects an Organization from the Address Book Tree, the following page will open (Figure- 54).

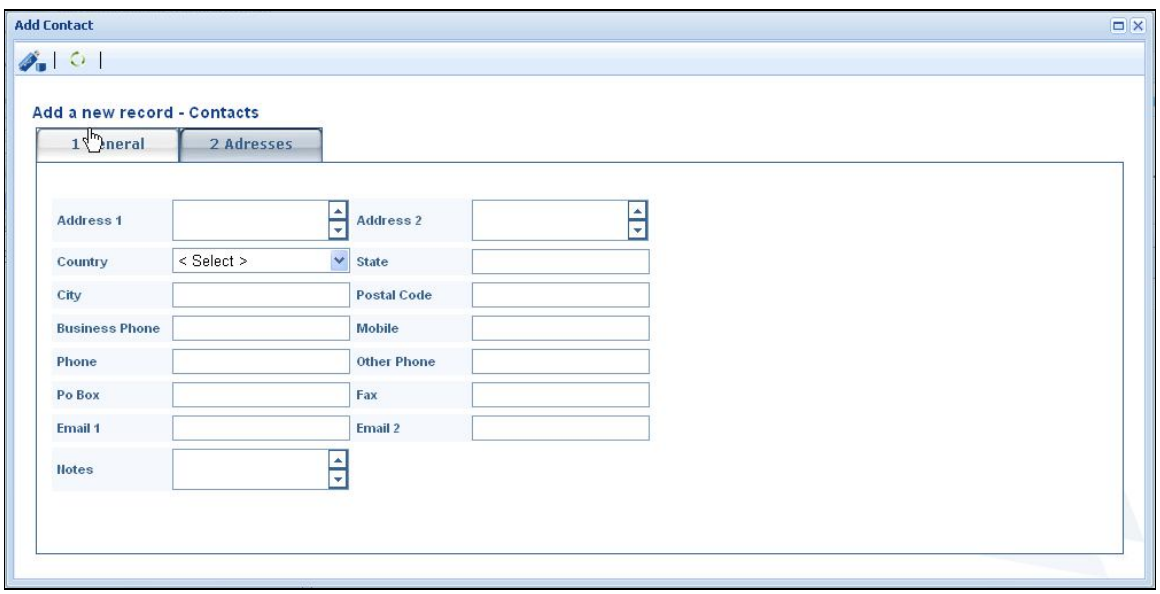
(Figure-54)

10.2.1 Add Contacts

Click on the add button to add a new contact (Figure-55, 56).



(Figure-55)



(Figure-56)

The records are saved after clicking the **Save** button.
The contact will be listed in the contact list.

10.2.2 Edit Contacts

Click on Edit button to edit the document.

The records are saved after clicking the **Save** button.

10.2.3 Delete contacts

Click on the Delete button to delete a contact.

11. TASKS

The user can assign internal tasks to an organization or a contact.
These tasks are standard or formal known phrases that are commonly used. When adding them to a correspondence they appear in the subject field before the essential subject (Figure-58)

(Figure-57)

Tasks are either automatically generated by the CTS system, either added by the user.
CTS automatically sends tasks to the user whenever that user is called for updating a correspondence, or for replying to a transfer. These are called "System tasks"

The user can also add personal tasks using the Add quick task field

Click on the delete button  to delete quick tasks or on the edit button  for modification.

Note: The user can only delete or edit personal tasks. Tasks assigned automatically by the system are neither editable, neither removable by the end user.