

# **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:

0	Add	This button allows the user to add a new row.
•••	Delete	This button allows the user to delete the selected row.
N.	Edit	This button allows the user to modify the selected row.
4	view	This button allows the user to view the list of items.
Ø.	Save	This button allows the user to save the record.
<u> </u>	complete	This button changes the status of the mail from "new" to "complete".
0	Reset	This button will reset all the fields found in the page.
0	Back	This button will take the user back one page.
4	Transfers	This button allows the user to transfer a mail to different contact(s) or department(s).
2	Links	This button allows the user to link correspondences together.
<b>C</b> o	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.
8	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 <b>Number of pages</b> .
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

	Welcome Super User Date: 14/08/2008	1 0 X Welcome Super User	
Correspondence Tracking	ystem		

(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

oy clicking on 🏪 (Fi 🍂 I 🐼 I 🚱	igure-3).		
	Cid Password	Change Password	
	New Password		
	Confirm		

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

Ever Suite Help Documentation	
Ever Suite Help Documentation	EVERSUITE HELP

(Figure-4)



#### <u>Overview</u>

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**

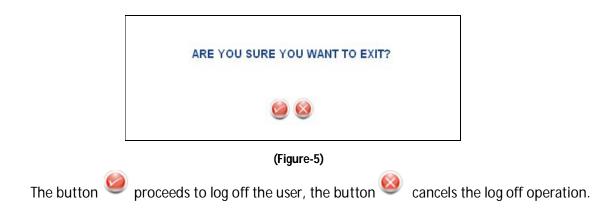
Displays the Titles of all bookmarked Contents each proceeded by a Checkbox. Selecting a Title displays its corresponding Content in the Main pane. Activating the preceding Checkbox marks the corresponding Title for removal.

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.

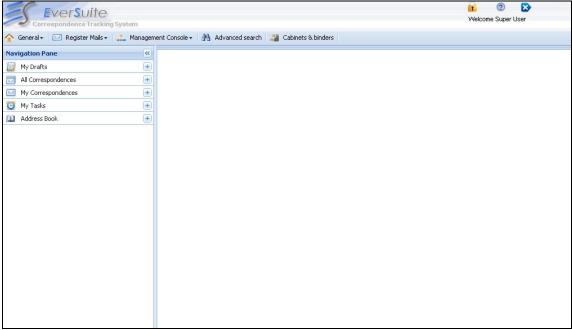




4. General		
The General section	🏠 General▼	displays the following list (Figure-6).
		<ul> <li>Home</li> <li>My Password</li> <li>My Profile</li> <li>My Projects</li> </ul>
		Quit (Figure-6)

## **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.

🖕 🚱 🚯 My Profile		
Title'	Mr.	
First Name*	superuser	
Last Name*	superuser	
Phone Number	96101123655	
Fax Number	96101123656	
Mobile	96103123657	2
EMAIL	superu@ever-me.com	

(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 lcons.

ES.Projects
Correspondence Tracking System

(Figure-9)

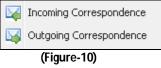
## 4.5 QUIT

Refer to <u>Section 3: "CTS Header"</u> for detailed instructions on logging off.



## 5. REGISTER MAILS

The **Register Mails** tab Register Mails at the left corner of the home page, displays both the incoming and outgoing mails for the logged in user (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

**<u>N.B.</u>**: The fields marked in red are mandatory and the user must fill them out.

### **5.1 INCOMING CORRESPONDENCE**

The **Incoming Correspondence** tab Incoming Correspondence opens (Figure-11) the "New Incoming Mail" dialogue.

🍂   😳   🔀	New Incoming Mail	
From	0 III	
То	0u	
сс		
Subject *		
Document Type *	< Select >	
Delivery Mode	< Select > V Originally To	
Document Reference *		
Document Date	18/08/2008 V Received Date 18/08/2008 V	
Body	Image: Source       Image: Source	





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 <sup>1</sup> (Figure-12) to fill in "From", "To" and "Cc" fields to select a contact.

Address Book - Microsoft Internet Explore	r provided by EVER ME		
I		Prganization/Contact Organization	
Type Name or select from list		ilter By 123 V	
		120	
Department Name	Key Personnel	Description	<u>^</u>
123			
	(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).





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

Import E-MAIL Web Page Dialog				?	X
급 🥰 dialaf	Drag a column header here	to group by that column			^
ASM Junk Mail	8 From	То	8c	Subject	=
Drafts Journal	elie francis	abbouchi11@hotmail.co		FW: Azka neeeeeeeeeeesL hama	
Outbox	🔽 🌒 hoyek hoyek	Diala Farah	Bachir Najm	Ksara Contract agreement requested	
Sent Items	Antoine Hraoui abed ghandour	Diala Farah	Microsoft Internet Exp	plorer 🛛	
	Ronald Cortbauwi	PPS	Are you sure yo	ou want to import this email	
	Ronald Cortbauwi	PPS			
	elie francis	abbouchi11@hotmail.co	, OK	CancelFaiSaL:FW:	
	Mohamed Najiya	Diala Farah	Salam Eld	KE: Traver Keservation August 14 for I	4
	Mohamed Najiya	Diala Farah		info	
	📃 🎚 Bachir Najm	Diala Farah		CD - pick up	
	hanih	Diala Farah		Re: Tony Return Date	
	hanih	Diala Farah		Re: Tony Return Date	
	🔲 🛛 Hani Hannoun	'Diala Farah'	'Jean Wehbe' ; 'Pierrot	GRE: Tony Return Date	
	hanih	unknown		Reservation for Dec 23	
	Salam Eid		Stephanie Azarian	RE: Passport Copy of Ms. Stephanie	
	🔲 🏮 Stephanie Azarian	Diala Farah		FW:	
	🔲 🏾 Stephanie Azarian	Diala Farah		FW: passport	~
	<				>
http://j15/esmail%202.0/Templates/CT5/selectMessage.htm?				Second intranet	-

(Figure-14)

## 5.2 OUTGOING CORRESPONDENCE

The other type of correspondence is the outgoing mail.

The **Outgoing Correspondence** tab Outgoing Correspondence opens (Figure-15), the "New Outgoing Mail" dialogue.

🖕 I 🗘 I 🔀 I		New Outgoing Mail	
From			
То	[		
сс			
Subject *	1		
Document Type *	< Select >	•	
Delivery Mode	< Select > -	Document Reference *	
Document Date	19.08/2008	Sent Date 15/08/2008	~
Body			

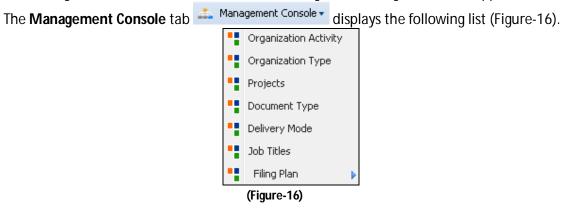
(Figure-15)

Refer to <u>Section 5.1 "Incoming Correspondence"</u> for detailed instructions.



## 6. MANAGEMENT CONSOLE

The management console consists of a list of manageable settings within the application.



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 Organizatior	n Activity 🎴 👓	rganization Activity	section opens the	following page (Fig	jure-17)
🗘   🔌   🥹   🖄					
				Page Size	20
8		Page 1	*		
Drag a column header here to grou	up by that column				
Contracting	ſ~				
Embassies	G				
Engineering					
Financing					
Hospitalization					
Hotels					
Import/Export					
Insurance					
🔲 Legal Representatives					
Manufacturing					
🔲 Media					
Office Supplies					
Seminars & Trainings					

(Figure-17)



### 6.1.1 ADD A NEW ORGANIZATION ACTIVITY

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

I		

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).

ACTIVITY NAME * Advertising		
L		

(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 <sup>Organization Type</sup> opens the foll

opens the following page (Figure-20).

0	<b>∖</b>   <b>⊘</b>  ⊘		1 😧
		Page Size	20 💌
	Page 1		
Drag	g a column header here to group by that column		
	Organization Type		
	Governmental		
	Non Governmental		
	Private		
	S.A.		
	S.A.E.		
	S.A.L.		
	S.A.R.L.		
	S.A.S.		
	S.R.L.		
	W.L.L.		

#### (Figure-20)

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

6.3 DOCUMENT TYPE				
The Document Type	, opens the following pa	age (Figure-21).		
○   N   0   2				
		Page Size	20	~
	Page 1			
Drag a column header here to group by that column				
DOC_Type				- A

Didg								
	D0C_Type							
	Invoice							
	Letter							
	Book							
	CD							
	Fax							
	Catalogue							
	Brochure							
	Company Literature							
	Document Transmittals							
	Inter-office correspondence							
	Affection Plan							
	Petty Cash Voucher							

(Figure-21)

Refer to <u>Section 6.1 "Organization Type"</u> for detailed instructions.



## 6.4 DELIVERY MODE

The Delivery mode

opens the following page (Figure-22).

0	1 🔪   🥹   👲			0
a.	J <sup>h</sup> r	Page 1	Page Size	20 💌
Dra	g a column header here to group by that column			
	Delivery Mode			
	Hand			
	Postage			
	Courier			
	Fax			
	E-mail			

(Figure-22)

Refer to <u>Section 6.1 "Organization Type"</u> for detailed instructions.

6.	5 Job Title			
The Job Title <sup>Job Titles</sup>		opens the following page (Figure-23).		
0	🔧   😝			
			Page Size	20 💌
		Page 1 😽		
Drag	a column header here to group by that column			
	Profession Name			
	Application Architect			
	CEO			
	Department Manager			
	Division Manager			
	Junior Developer			
	Project Manager			
	Regional Manager			
	Secretary			
	Senior Accountant			
	Team Leader			
	Trainee			
	Unit Manager			

(Figure-23)

Refer to <u>Section 6.1 "Organization Type"</u> 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).





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).

O   N   O   √ <sup>Im</sup> Page Size 2							
Dra	Page 1						
	Code	Title	Description	Location	Belonging To		
	Cabinet1	Cabinet1			Administration Department		

(Figure-25)

Code *			
Description			
Location			
Belonging To *	< Select >		

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

<sup>(</sup>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.

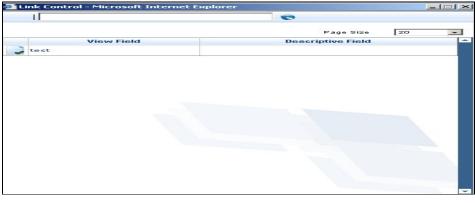
Refer to <u>Section 6.6.1 "How to Create a Cabinet"</u> for detailed instructions, with the following exceptions.

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 <sup>the</sup> 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.

Parent *	Sec. 1	
Code *		
Title *		
Description		
Location		
I		









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

🎄 i 🗘 i 🔏 i 🥠		
Туре	= V < Select > V	And 💌 📥
Sys Reg Hum	=	And 💌
Document Type	= 😪 < Select >	And 💌
Originally T∮	= V	And 💌
Date Received	= 🖌	And 💌
Document Date	=	And 💌
Registration Date	=	And 🚩
Subject		And 💌
From	=	And 💌
То	= 🗸	And 🛩
Status	= V < Select > V	And 🛩
DOC_NEEDSUPDATE	= 🗸	And 💌
DOC_EDITOR_ID	= 🖌 🗌	-

(Figure-29)

The user selects the field he wants to search for from the lists < Select > 🚬, and then

	And	<
	And	
or	Or	

select the logical operato

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.

	R					Page Size	20		
Drag	Page 1 V Drag a column header here to group by that column								
	Туре	Sys Reg Num	Date Received	Subject	From	То	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	0/DED/1382008	8/13/2008 12:00:00 AM	Outgoing	Denis Edde	external org	New		
	Outgoing Mail	0/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).

1 🔊	Ny Drafts	-
	Incoming Drafts	
	Outgoing Drafts	
	(Figure-31)	

### 8.1 INCOMING DRAFTS

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

In	coming mail					Page Size	20
			1				
_	Туре	Sys Reg Num	Date Received	Subject	From	То	Status
	Incoming Mail	I/DED/392080/1982008	19/08/2008	CCs Test	Rach Sayah	Denis Edde	Draft
	75						

(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).

From	external org - Rach Sayah (Team Leader)	
Го	Ever ME - EVER Middle East - Production I	Department - Microsoft Technologies - 💷 🔿
cc 1	Dayana Tarraf (Team Leader);Ghasse Manager);Hadi Fakhredine (Team Lea (CEO)	
Subject *	CCs Test	
Document Type *	Brochure 💌	
Registration ] Number	I/DED/392080/1982008	
Delivery Mode	Courier 💌	Originally To
Document Reference *	CCs Test001	
Document Date	19/08/2008 🔽	Received Date 19/08/2008
[	<:p&qt:CCs Test<:/p&qt:	

(Figure-33)



8.1.1 ATTACHMENT

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

Attachments		
	Ś	
Attach Mails		
	(Figure-34)	

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

Attachments	
0	🦓 I 🖧 I 🗘 I
	Document
	Title
	Description
/m··	uro 2E)

(Figure-35)

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

Attachments				
Attach Mails	Title Description	Document test testing	ts Management Create User Create Date	Super User 8/27/2008 12:00:00 AM
	(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

N 🔊 😳	Ø, Ø,		
	Document		
Attach Mails	Title	test	
www.test	Description	testing	
	Create Date	27/08/2008	

#### 8.1.1.2 ATTACH DOCUMENT

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

Attachments	C	
N. 🖉 🌫 😆	🀬   After 🖸 🔽	
S	Documents Management	
E Attach Mails E W Test	Document To Upload Browse	
Winter		
	Winter_1_0_0.jpg	
	V 1.0.0	
	× 🙆	

#### (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).



#### 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 (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 Sutton 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 Sutton 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 Sutton 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.

Delete Confirmation	
Current Version	All Versions

#### 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)

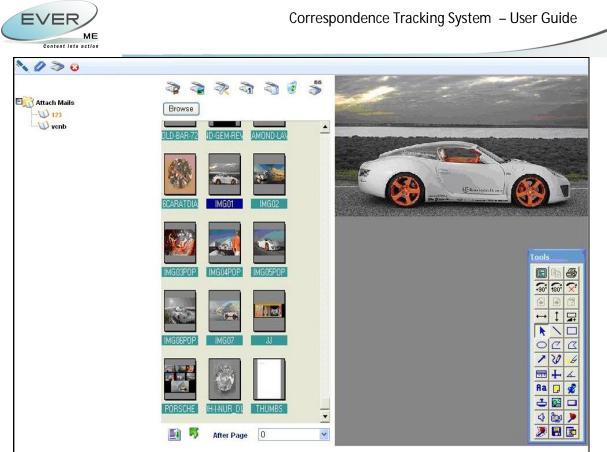
The 🙆 Button is the Document Locking Command.

The Rutton 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 solution must be clicked which will open the following interface. In order to scan the files the browse button Browse 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 scanner options.

The value of the scanning parameters.

The <sup>3</sup> button enables the user to choose the coloring options of the scanner.

The Empty Tray<sup>12</sup> 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 <sup>22</sup> 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.

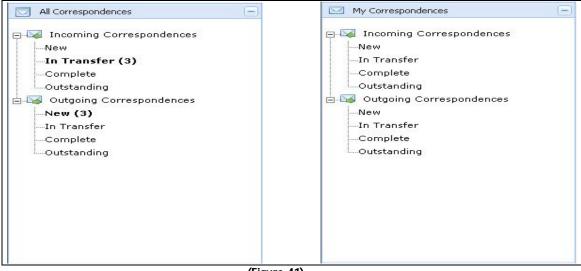
## 8.2 OUTGOING DRAFTS

Refer to <u>Section 8.1 "Incoming Draft"</u> 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)

Status s Edde In Transf	From T	Subject	Date Received	120 2 100			
	Rach Sayah		Dute Received	Sys Reg Num	Туре		
	inden edjan i	CCs Test	19/08/2008	I/DED/392080/1982008	Incoming Mail	~	
Farah In Transf	external org	ES-BPS Training in Beirut >> Abdulrahman Hijazi	18/08/2008	I/DFA/392079/1882008	Incoming Mail		
s Edde In Transt	123 [	123	14/08/2008	I/DED/392072/1482008	Incoming Mail		
Fakhredine In Transf	external org	subject 1 updated	13/08/2008	I/HFA/392064/1382008	Incoming Mail		
s Edde In Transf	external org [	Test	13/08/2008	I/DED/392063/1382008	Incoming Mail	2	
	-					~	





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

	- A
From	123 - 123
То	Team Leader - Ever ME - EVER Middle East - Production Department - Microsoft Technologies - Hadi Fakhredine (Team Leader)
cc	
Sys Reg Num	I/HFA/392081/2082008
Reg Date	8/20/2008 12:00:00 AM
Subject	For outstanding test
Recieved Date	
Status	In Transfer
Comments	
Delivery Mode	
Document Type	Affection Plan
Man Reg Num	REFOUTSTONG

(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)

ran	sfers						<b>+</b>	
	Transfers					Manage Tran	nsfer	
				I 🗘 I 🕯	🔪 I 😔 I	🧳 🖌 🐳		
Si Da	g Number: I/DEI Ibject: 123 Ite: 14/08/2008 ansfers			ge Size 20		From	Ever ME-superuser superuser (CEO)	
_	From	То	Date	Subject	Status	То		60
	Hadi Fakhredine	Diala Farah	18/08/2008 00:00:00	Other	Sent	Status	New	
	Hadi Fakhredine	Denis Edde	14/08/2008 00:00:00		Replied	Action	< Select >	
	Denis Edde	Hadi Fakhredine	14/08/2008 00:00:00	For Transfer	For Reply			
	Hadi Fakhredine	Denis Edde	14/08/2008 00:00:00	Other	Read			
	Denis Edde	Edy Oryan	14/08/2008 00:00:00	For Update	Sent	Description		
	Denis Edde	Hadi Fakhredine	14/08/2008 00:00:00	For Approva	I Read		·	
						Requires Response		
						Requires Response Date	Respond On 🗸	
						Send Multiple		





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<sup>11</sup> to fill the "**To**" field (Figure-45).

гуре мап	ne or select from list		
	Contact Full Name	Organization	Profession
	Antoine Hraoui	EVER Middle East	CEO
	antoine hraoui	Ever ME	CEO
	Dayana Tarraf	Microsoft Technologies	Team Leader
	Denis Edde	Microsoft Technologies	Junior Devel
	Diala Farah	Administration Department	Department
	Edy Oryan	Microsoft Technologies	Junior Devel

(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" response.	Requires Response	Checked,	the recipient	is obliged	to
Once the "Requires Response date	Requires # Response Date	Checked,	the recipient is	s obliged to	
respond before the date mentione	d in "Respond Oı	Respond On		<b>*</b>	
To send several transfers to severa	l contacts, check	"Send Multip	ole" Send Multiple	e 🗌	

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 *(v)*, 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).

Links										
			016	3	Øu I				1	0
Reg Number: I/DFA/392079/11 Subject: ES-BPS Training in E Date: 18/08/2008	3eirut >> Abdulrahman Hij	jazi Page Size	20	~	Reg Number: I/DFA/3 Subject: ES-BPS Tra Date: 18/08/2008 Available Mails	iining i	in Beirut >> Abdulrahman	Hijazi Page Size	20	~
	1						1			
System Reg	Date	Subject	Descript	ion	System Registra	tion	Subject			Reg
I/DED/392080/1982008	8/19/2008 12:00:00 AM	CCs Test			I/DED/392063/138	82008	Test			13/0
	\ \				I/HFA/392064/138	2008	subject 1 updated			13/0
	$\backslash$				0/DED/1382008		Outgoing			13/0
					0/DED/1382008		fdfd			13/0
					O/HFA/1382008		fbdfjhj			13/0
					I/DED/392072/148	82008	123			14/0
					[] I/DED/392077/188	82008	rtrt			18/0
					I/DFA/392079/188	82008	ES-BPS Training in Beiru	t >> Abdulrah	man Hijazi	18/0
					I/DED/392080/198	82008	CCs Test			19/0
					I/HFA/392081/208	2008	For outstanding test			20/0
	\	$\langle \rangle$			I/DED/392082/218	82008	Ext			21/0
8					1					•
			(Figu	re-4	46)					
							1			
			×		System Reg		Date	Subject	Descrip	otion
			🔲 I/	DED	)/392080/1982008	8/19	9/2008 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  $\bigcirc$  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 <sup>C</sup> a storage area that reflects the centralized location will appear (Figure-48).

Reg Number: I/E Subject: 123 Date: 14/08/2008 Archive		32008	Page Size	20 👻	Cabinet	<select></select>	~	
DeSelect All	Select All				Shelves	< Select >	4	
Cabinet	Shelves	ige 1 💙 Bind		Folder	Binders	< Select >	~	
Cabillet	Sherves	BIIIU	er	Folder	Folder *	< Select >	~	

(Figure-48)

The Add button  $\bigcirc$  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 3 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.

🍂 🔿 🛛 🔀 🛛	New Outgoing Mail
From	Junior Developer - Ever ME - EVER Middle East - Production Department - Microso
То	123 - 123
сс	
Subject *	123
Document Type *	< Select >
Delivery Mode	< Select > V Document Reference *
Document Date	18/08/2008 Sent Date 18/08/2008
Body	

(Figure-49)

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

### 9.7 Search

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



## 9.8 TRACK

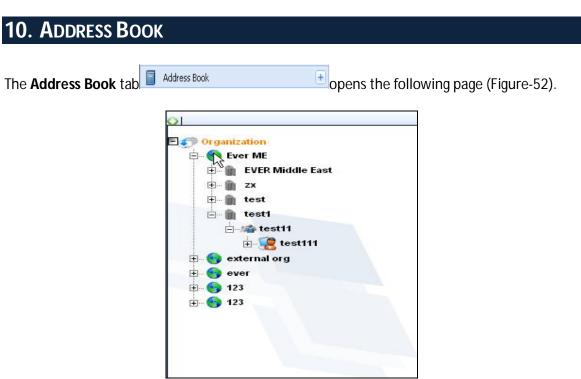
was exposed to (Figure-50).

🕘 Document Informati	ion - Micros	oft Intern	et Explore	er provided by [	VER N	ME					
Linked Mails											
Red Number	Mail Туре	From	То	From Organizatior		To Organiz	ation	Status	Subject	Registe Date	r
	Incoming Mail	external org	Denis Edde	external org		Denis Ed	le	ln Transfer	Test	8/13/20	08
<u>Mail Transfers</u>	2	55				1.1				8	
From	То	D	ate		Due	date	Descrip	otion	Subject		
superuser superuser	Dayana T	arraf 8/1	18/2008 1:	2:00:00 AM					For Approv	al Peno	ding
Related documents											
Name D	escriptio	า		Creatio	n da	te					
Winter T	est			8/22/20	08 4:-	49:38 PI	М				
				(Figure-50)							

(Figure-50)

The user can track and print a correspondence by pressing the print button  $\stackrel{ low}{\Longrightarrow}$  .





(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 <sup>SO</sup> will appear in order to be able to add a new organization (Figure-52)



MAL MALLON

Parent Organization	< Select >	~	Ê
Organization Code			
Organization Name *			
Organization Description		A V	
Entity Url			
Organization Ty	pe < Select >		
Activity	< Select >	<b>~</b>	
Relation Type	< Select > 🛩		
Phone			
Fax			
Active			
Capital			
My Organization			

(Figure-52)

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

		ſ
Parent Organization	< Select >	
Organization Code	EME	
Organization Name *	Ever ME	
Organization Description	IT Company	
Entity Url	http://www.ever-me.com	
Organization Typ	e S.A.R.L.	
Activity	Automation & Information Technology 💙	
Relation Type	Local	
Phone	01513531	
Fax	01513532	

(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 <u>Section 10.1.1 "Adding/Editing an Organization"</u> 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 <u>Section 10.1.1 "Adding/Editing an Organization"</u> 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 <u>Section 10.1.1 "Adding/Editing an Organization"</u> 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).

Co	ntacts				Pa	age Size 20 💌		
	1							
	System User	FirsLName	Last Name	Position	Business Phone	Mobile		
	Super User	superuser	superuser	CEO		96103123657		
	antoine hraoui	antoine	hraoui	CEO				

(Figure-54)



## 10.2.1 Add Contacts

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

ontact				•
0				
ld a new reco				
1 General	2 Adresses			
Initials		Title	< Select > 💌	
First Name *		Middle Name		
Last Name *				
Active				
Position *	< Select >		~	
System User		۲ <u>۴</u>		

(Figure-55)

d a new record	- Contacts			
1 ()neral	2 Adresses			
Address 1		Address 2	4	
Country		✓ State		
City		Postal Code		
Business Phone		Mobile		
Phone	-	Other Phone		
Po Box		Fax		
Email 1		Email 2		
llotes				

(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)

Add quick task:	
	view all >>
quicky Response required ( Update corresponde (I/HFA/392064/1382)	
(Fig	gure-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

Add quick task:

Click on the delete button  $\stackrel{\textbf{ oo}}{\longrightarrow}$  to delete quick tasks or on the edit button  $\stackrel{\textbf{ oo}}{\longrightarrow}$  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.