DOCUMENT MANAGEMENT SYSTEM

Office Letter User Manual

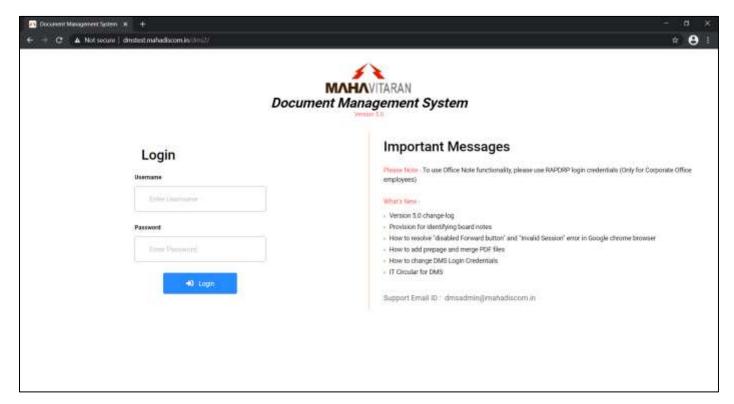
DECEMBER 20, 2020

MSEDCL dmsadmin@mahadiscom.in

1. URL

https://dms.mahadiscom.in/dms/

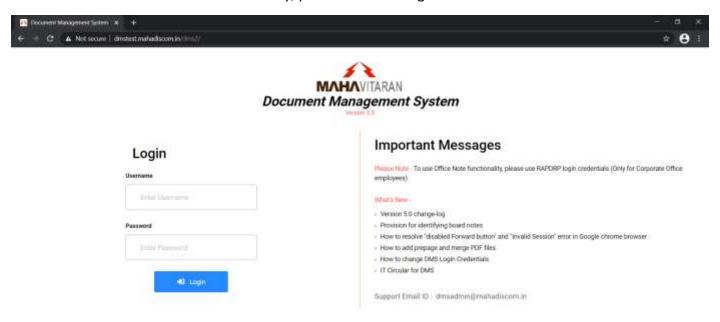
Support Email ID: dmsadmin@mahadiscom.in



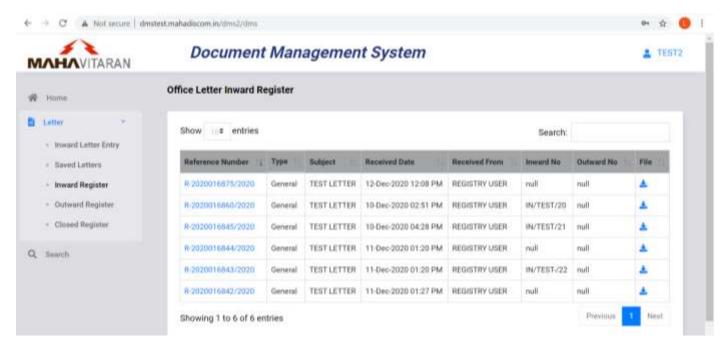
- For login enter username & password then click Login button.
- Please read all important messages displayed on right side of screen.

2. Login

• To access Office Letter functionality, please use DMS login credentials



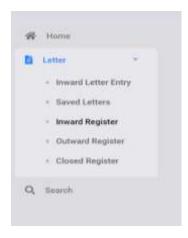
• After successful login, Office Letter Inward Register will be displayed.



• On clicking your username at top right corner, details of currently logged in user will be displayed along with option to logout.



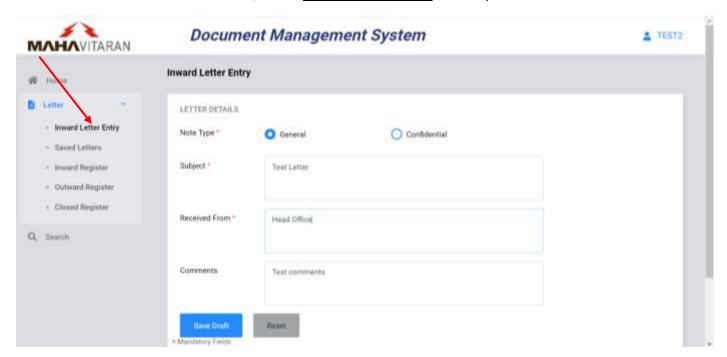
• On left side of homescreen, menu options are displayed as per below.



- Home Under development
- Office Note
 - <u>Inward Letter Entry</u> To inward New Office Letter
 - <u>Saved Letters</u> To View/Edit <u>Saved</u> Office Letters
 - Inward Register To View/Edit Received Office Letters
 - Outward Register To View Outward Office Letters
 - Closed Register To View Closed Office Letters
- Search To Search Office Letters

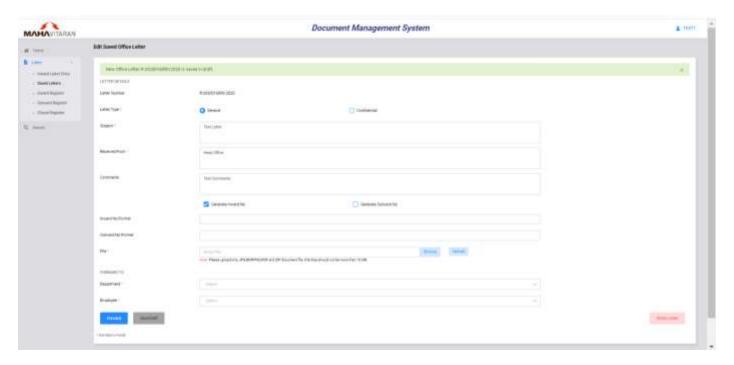
3. Inward Office Letter

• To inward a new Office letter, select **Inward Letter Entry** menu option.



- On Inward Letter Entry page, select Letter Type, enter Subject, Received From and Comments.
- To save and generate office letter number, click on **Save Draft** button.

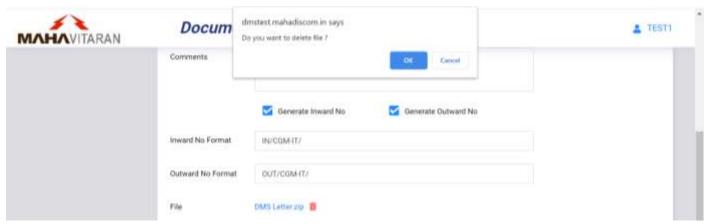
• After the letter is saved, Office Letter number will be generated and more details will be displayed as shown below -



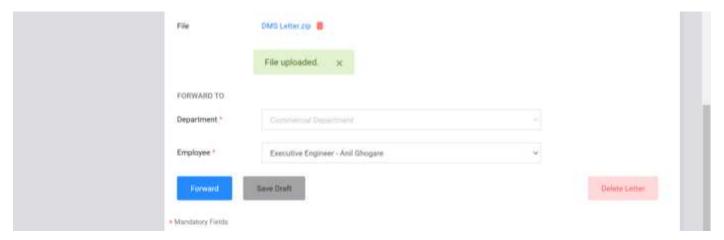
- Even after saving Letter, user can still change Letter Type, Subject, received from and comments.
- To generate Inward/Outward no., tick respective checkbox and enter Inward/Outward No Format
- To upload file, click on **Browse** button then select file and click on **Upload** button.
- On successful file upload, a success message is shown as below.



- Please note that, user can only upload a pdf file having maximum size 10 MB.
- User can delete uploaded file and upload another file; till the letter is forwarded.
- To delete file, click on on 🛅 icon, and click OK as shown below.



To forward office letter, select Department and Employee from dropdown list.



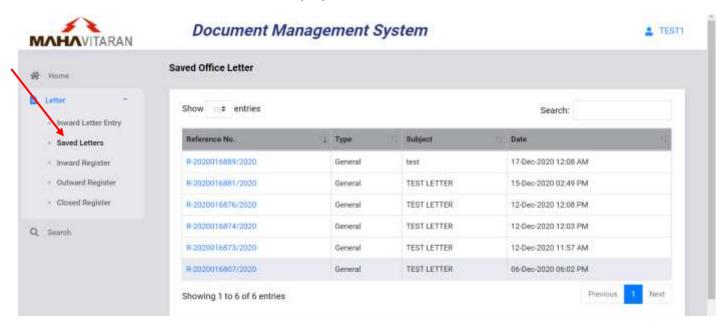
- Click on <u>Forward</u> button to forward office letter.
- User can click on **Save Draft** button to save office letter in draft and forward later.
- To delete office letter click on <u>Delete Letter</u> button and select OK on confirmation alert.



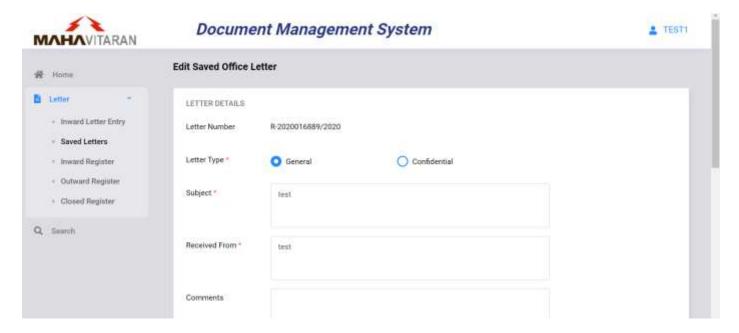
- After office letter is forwarded, a message will be shown as above.
- User can view your forwarded office letters in Outward Register menu.

4. Edit Saved Office Letters

- To view and edit saved office letters, use **Saved Letters** menu option.
- List of saved office letters will be displayed in a table as shown below.



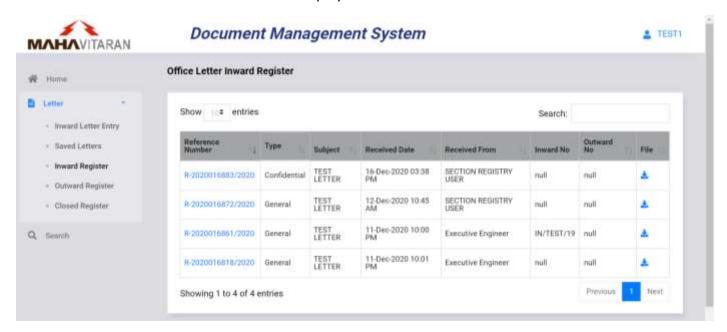
- User can sort the list by clicking on column header.
- User can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right corner or use <u>Previous</u>/<u>Next</u> button.
- To view / edit a office letters click on its reference number. Selected Office Letter will be opended in Edit mode as shown below.



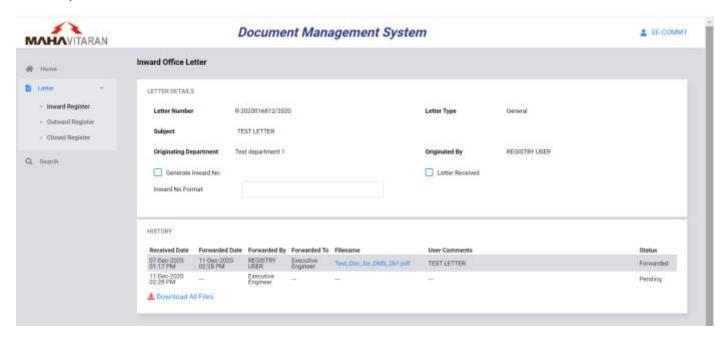
- User can change letter type, subject, received from, comment, upload/delete file
- User can Forward, Save Draft or Delete office letter after making changes.

5. Inward Register

- User can view/edit office letters received to him in <u>Inward Register</u> menu option.
- Only those office letters which pending with user will be displayed in this menu.
- List of received office letters will be displayed in a table as shown below.

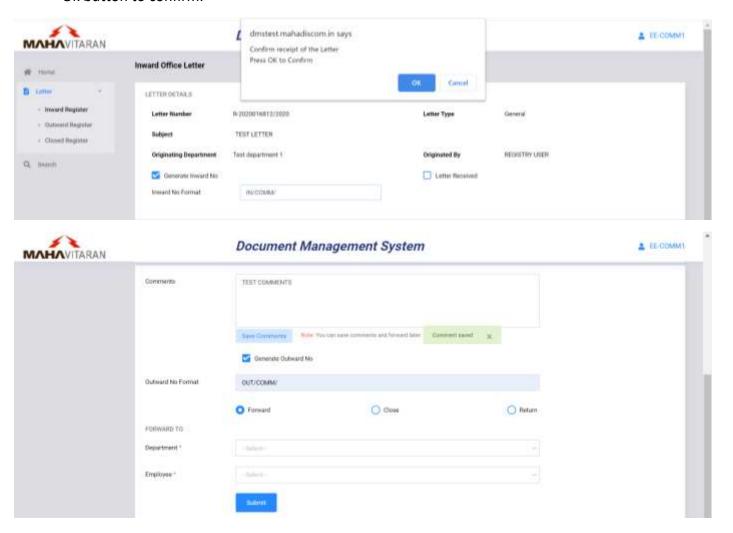


- User can sort the list by clicking on column header.
- User can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right corner or use <u>Previous</u>/<u>Next</u> button.
- You can click on Download button to download all files present in that office letter.
- To view / edit a office letter click on its reference number. Office Letters details will be shown as below-



- User can click on respective file name shown in history to download that file, otherwise click on <u>Download All Files</u> to download all files.
- To generate Inward no., tick "Generate Inward No" checkbox and enter Inward No. format.

• To receive letter, tick "letter received" checkbox. Confirmation alert message will be shown. Click Ok button to confirm.



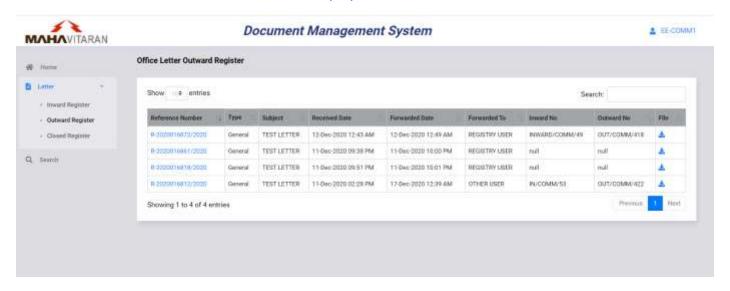
- Enter comments in the textbox. User can click on <u>Save Comments</u> button to save comments and forward office letter later.
- To generate Outward no., tick "Generate Outward No" checkbox and enter Outward No. format
- Select Department and employee from dropdown list and click submit button



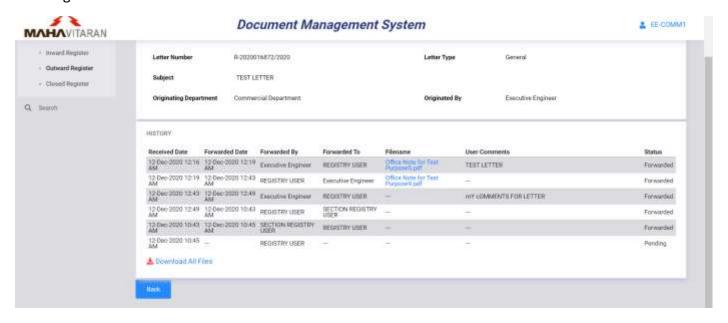
• A success message is shown as above after office note is forwarded.

6. Outward Register

- User can view office letters forwarded by him in **Outward Register** menu option.
- List of forwarded office letters will be displayed in a tabular format as shown below-



- User can sort the list by clicking on column header.
- User can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right corner or use <u>Previous</u>/<u>Next</u> button.
- User can click on **Download** button to download all files present in that office letter.
- To view a office letter click on its reference number. Selected Office letter details will be shown as given below-

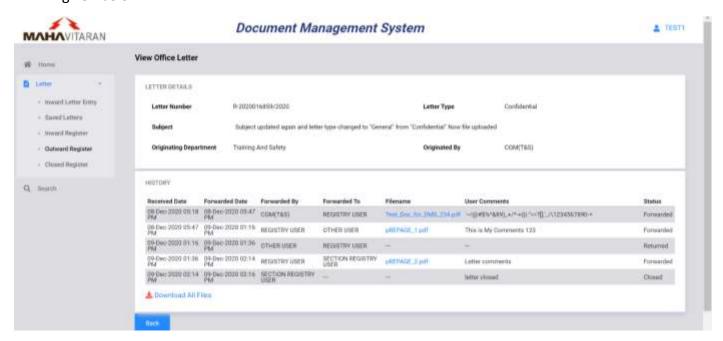


7. Closed Register

User can view closed office letters which were forwarded/received by him/her in <u>Closed Register</u> menu option.

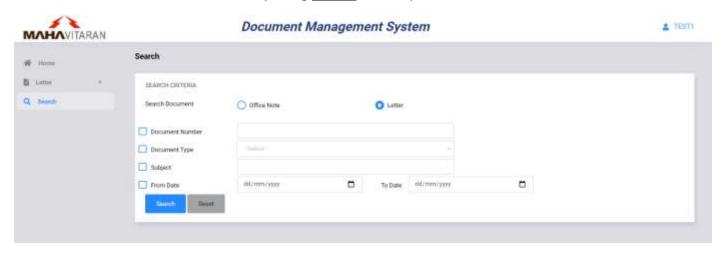


- List of closed office letters will be displayed in a table as shown above.
- User can sort the list by clicking on column header.
- User can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right corner or use <u>Previous/Next</u> button.
- User can click on Download button to download all files present in that office letter.
- To view a office letter click on its reference number. Selected Office letter details will be shown as given below -

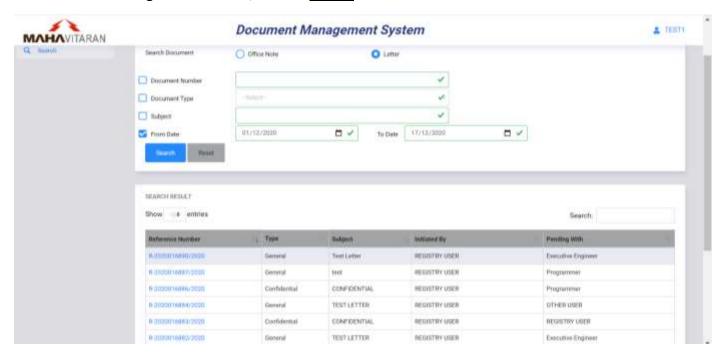


8. Search

User can search office letters by using <u>Search</u> menu option.



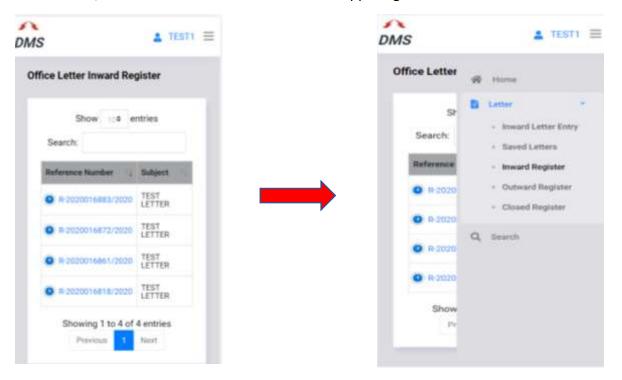
- Select Document Type.
- User can search office letters by using Document number, letter type, subject or date.
- User can combine one or more search criteria.
- After entering search criteria, click on **Search** button.



- List of office letters matching given search criteria will be shown as above.
- User can click on reference number to view office letter details.
- User can search and view all office letters initiated or received under your office.
- For Confidential office letter, user can view the office letter only if user have received/forwarded that letter.

9. Mobile Compatibility

- Document Management System version 5.0 is compitable with mobile/tablet devices.
- A sample Inward Register page on mobile device is shown below.
- To show/hide menu click on Menu icon on upper right corner as shown below.



On various list pages click on icon to view office letter details