DOCUMENT MANAGEMENT SYSTEM

Office Note User Manual

MARCH 23, 2024

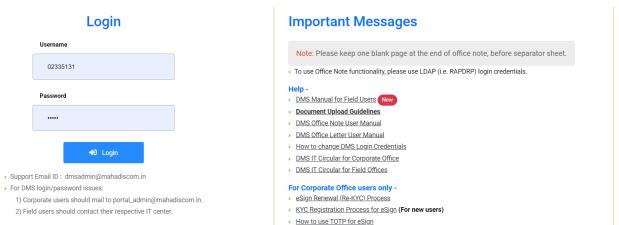
MSEDCL dmsadmin@mahadiscom.in

1. URL

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

Support Email ID: dmsadmin@mahadiscom.in

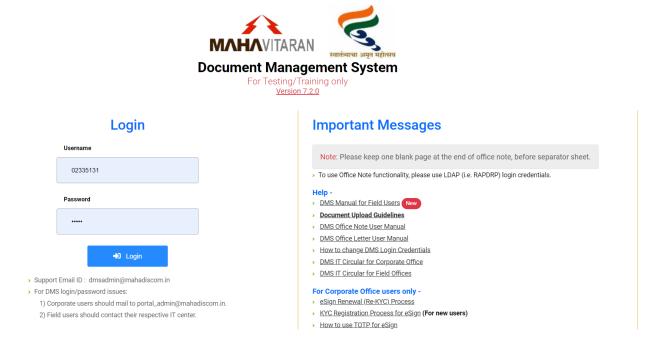




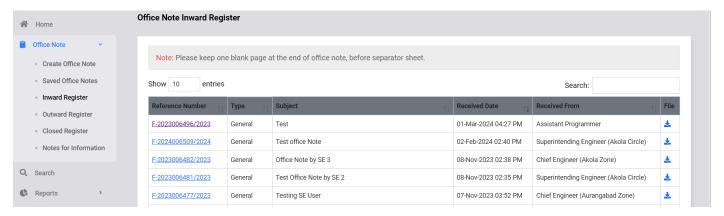
- For login enter username & password then click Login button.
- Please read all important messages displayed on right side of screen.

2. Login

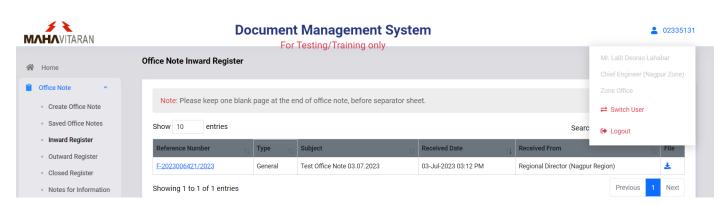
• To access Office Note functionality, please use LDAP (RAPDRP) login credentials i.e. CPF number and password and click **Login** button.



After login, Inward Register for Office Notes 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.

Office Note

Create Office Note

Saved Office Notes

Inward Register

Outward Register

Closed Register

Notes for Information

Search

Reports

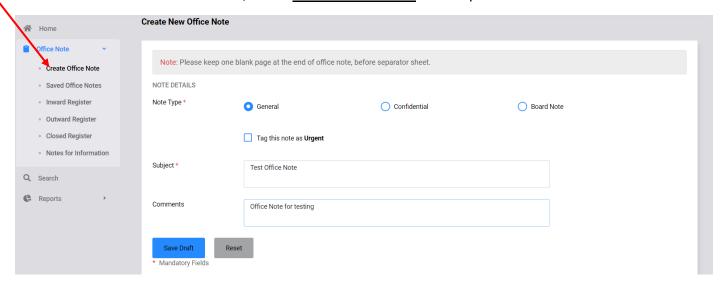
Modify Charge

<u>Home</u> – Notifications and downloads are available on home screen.

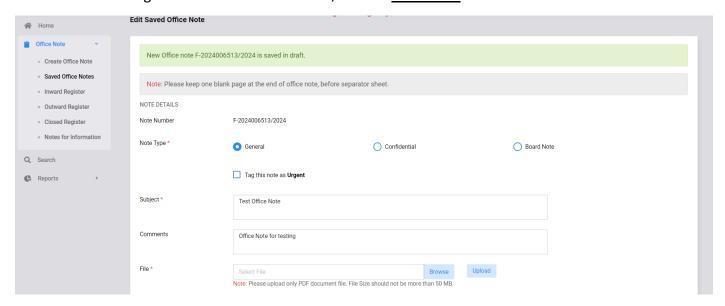
- Office Note
 - <u>Create Office Note</u> To create New Office Note
 - Saved Office Notes To View/Edit Saved Office Notes
 - Inward Register To View/Edit Received Office Notes
 - Outward Register To View Outward Office Notes
 - Closed Register To View Closed Office Notes
 - Notes for Information To View Notes Received only For Information. User can view it but can not perform any action (eSign/forward/return/close) on it.
- o **Search** To Search Office Notes
- o Reports Pending and abstract report of Office Notes
- o Mofify Charge Assigning the charge to employees

3. Create Office Note

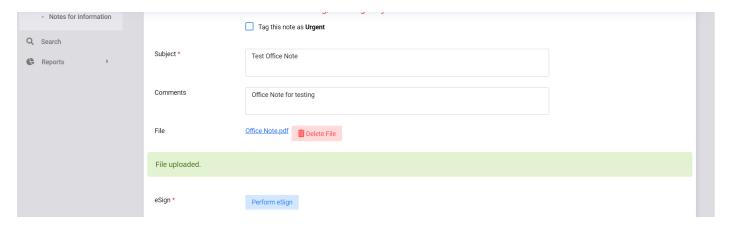
To create a new Office note, select <u>Create Office Note</u> menu option.



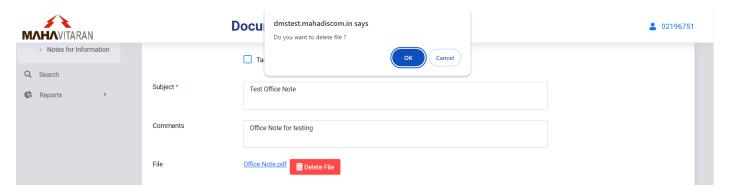
- On Create Office Note page, select Note Type, enter Subject and Comments.
- Tick checkbox if you want to tag office note as URGENT.
- To save and generate office note number, click on **Save Draft** button.



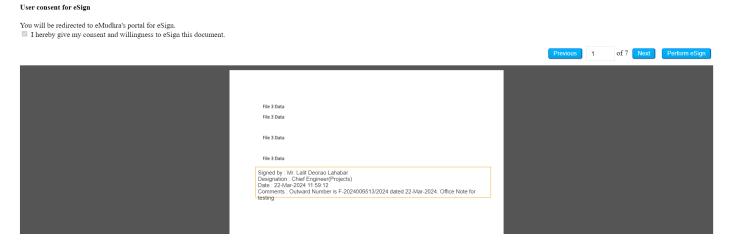
- You will be redirected to Edit Saved Office Note page and New Office Note number will be generated and displayed as shown above.
- You can change Note Type, Subject, comment and upload file on edit page.
- To upload file, click on **Browse** button then select file and click on **Upload** button.



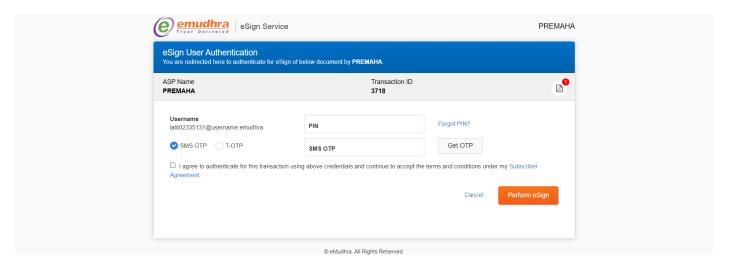
- On successful file upload, a success message is shown as above.
- Please note that, you can only upload a pdf file having maximum size 50 MB.
- You can delete the uploaded file if office note is not yet forwarded.
- To delete file, click on on icon, and click OK as shown below.



- To perform eSign, click on **Perform eSign** button.
- A popup page will be shown as below.



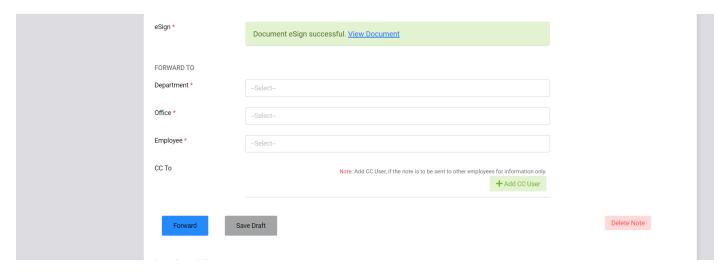
- Select appropriate page number for eSign by clicking on **Previous** and **Next** button.
- Move the eSign box to select desired sign position on the page.
- Please make sure that your sign box does not cover note content or previous authorities sign.
- Click on **Perform eSign** to proceed. You will be redirected to emudra's website to complete eSign.



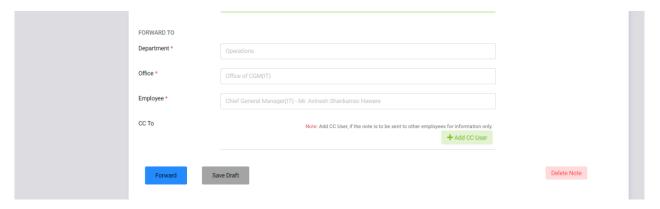
- On emudra's website, enter your PIN number then click on <u>Get OTP</u> button to receive OTP on mobile.
- Enter OTP received on mobile, select checkbox to accept terms then click on **Perform eSign**.
- You will be redirected back to dms and a page will be displayed as below.



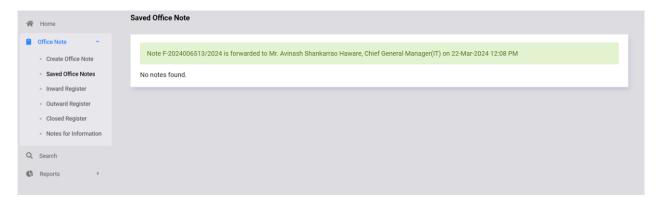
• Please do not click back/refresh button or close the window, the window will be auto-closed.



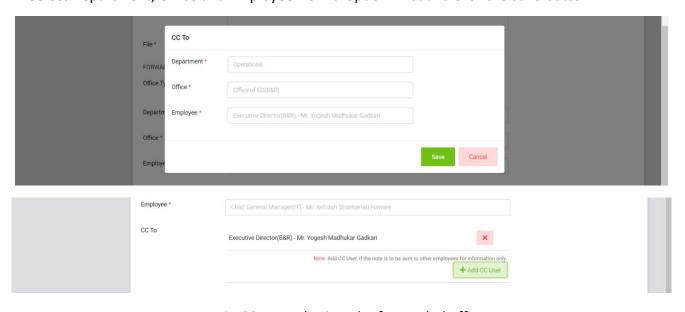
- On successful eSign, a success message will be displayed as above. You can click on View Document to view eSigned document.
- To forward office note, select Department, Office and Employee from dropdown list.



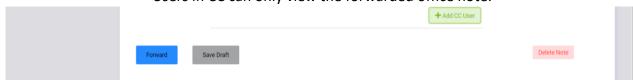
- Click on **Forward** button to forward office note.
- You can click on **Save Draft** button to save office note in draft and forward later.
- To delete office note click on **Delete Note** button and select OK on confirmation alert.



- After office note is forwarded, a message will be shown as above.
- You can view your forwarded office notes in Outward Register menu.
- User can add users in CC while sending office note.
- Click on Add CC User button.
- Select Department, Office and Employee from dropdown list and click the Save button.

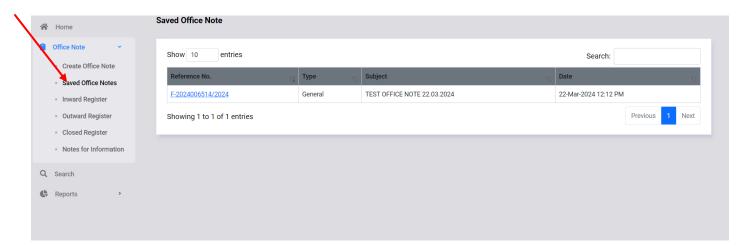


• Users in CC can only view the forwarded office note.

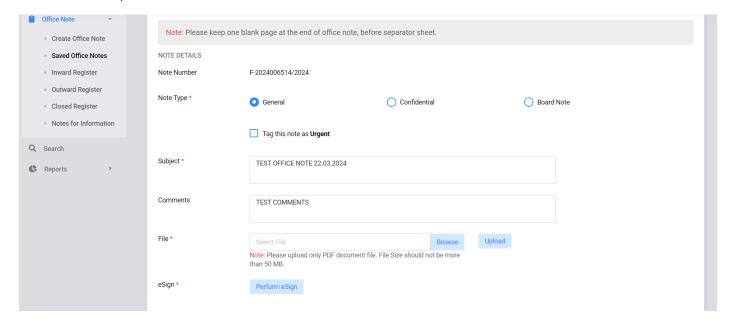


4. Saved Office Notes

To view and edit saved office notes, use <u>Saved Office Notes</u> menu option.



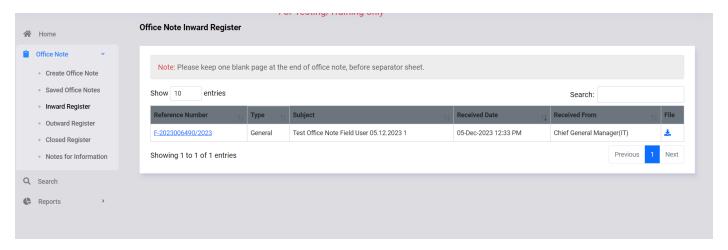
- List of saved office notes will be displayed in a table as shown above.
- You can sort the list by clicking on column header.
- You can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right corner or use <u>Previous</u>/<u>Next</u> button.
- To view / edit a office note click on its reference number.



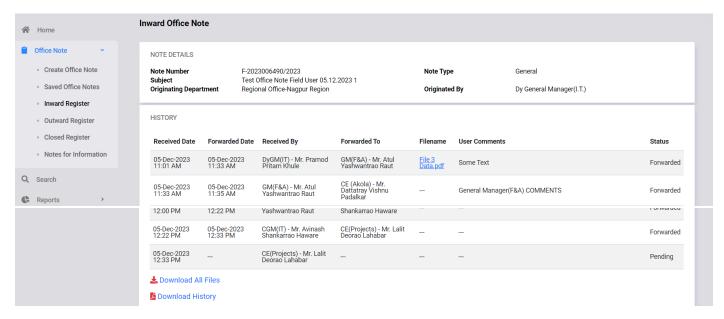
- Selected Office Note will be opended in Edit mode as shown above.
- You can change note type, subject, comment, upload/delete file as described in Create Office Note menu.
- You can Forward, Save Draft or Delete office note after making changes.

5. Inward Register

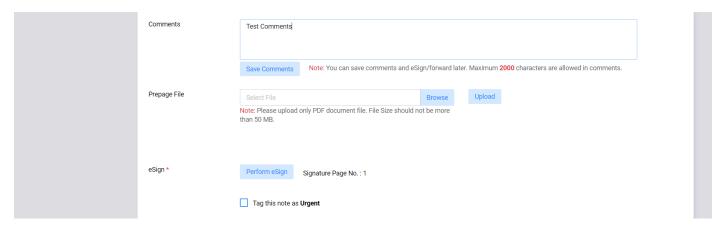
- User can view/edit office notes received to him in Inward Register menu option.
- Only office notes pending with user will be displayed in this menu.



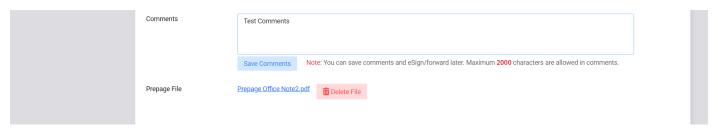
- List of received office notes will be displayed in a table as shown above.
- You can sort the list by clicking on column header.
- You can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right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



- Office Note details will be shown as per above.
- You can click on respective file name shown in history to download that file, otherwise click on Download All Files to download all files.
- To download office note details in pdf format click on **Download History**.



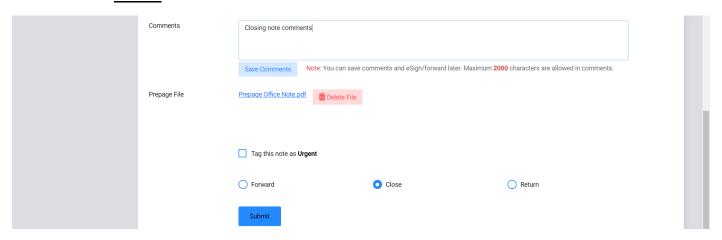
- Enter your comments in the textbox. You can click on <u>Save Comments</u> button to save comments and forward office note later.
- If you wish to upload prepage file, click on **Browse** to select file then click **Upload**.



- Please note that, eSign will always be performed on latest file or prepage.
- To forward office note, follow the same steps described earlier.
- To Return a office note, click on <u>Return</u> checkbox. Dropdown list for employee selection will be displayed as below.



- Select return employee, from dropdown list.
- Click on **Submit** to return office note.



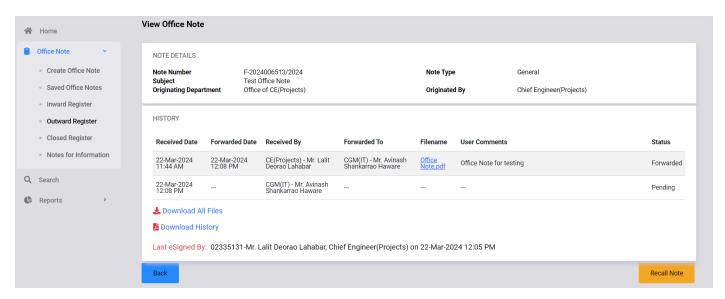
- To Close a office note, click on Close checkbox.
- Then click on <u>Submit</u> button to close office note.

6. Outward Register

• User can view office notes forwarded by him in **Outward Register** menu option.



- List of forwarded office notes will be displayed in a table as shown above.
- You can sort the list by clicking on column header.
- You 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 note.
- To view a office note click on its reference number.

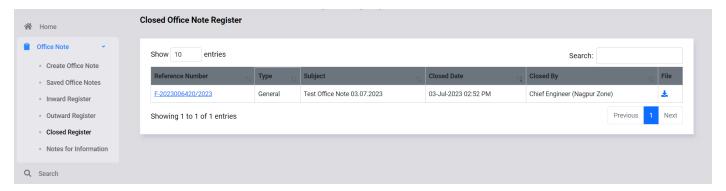


- Selected Office note details will be shown as above.
- User can recall office note forwarded by him. To recall note, click on Recall Note button.
 Office note will be returned back to user automatically.

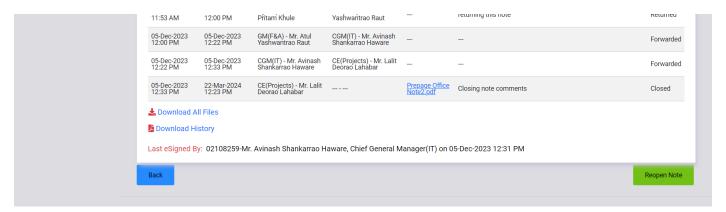
Note: There are some limitations on office note recall facility.

7. Closed Register

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



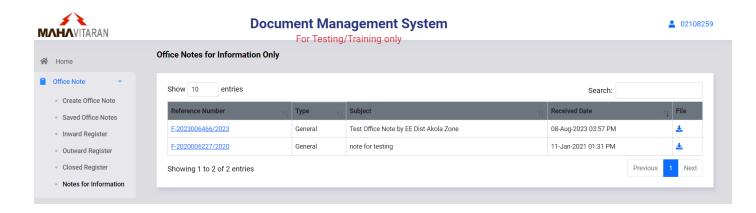
- List of closed office notes will be displayed in a table as shown above.
- You can sort the list by clicking on column header.
- You can also search in the list by entering search text in input box provided on upper right corner.
- To goto different page, click on page number shown in bottom right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



- Selected Office note details will be shown as above.
- User can reopen the closed office note if closed by him. He has to click on Reopen Note button.

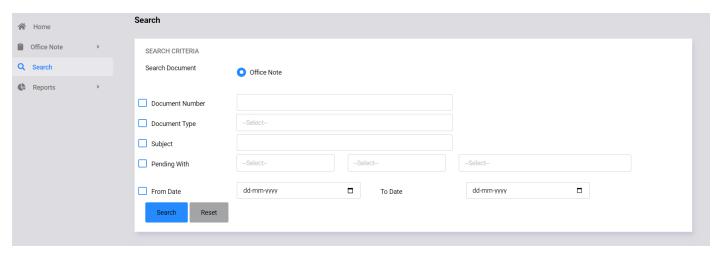
8. Notes For Information

- a. User can view office notes for information on clicking **Notes for Information** menu.
- b. These office notes are for information purpose only. User can view it but can not perform any action (eSign/forward/return/close) on it.

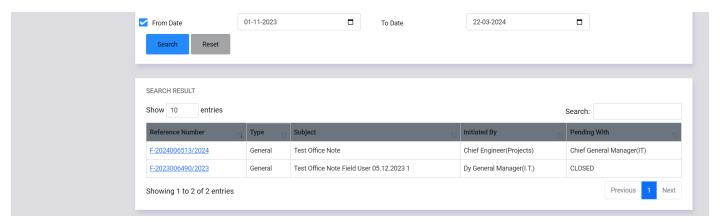


9. Search

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



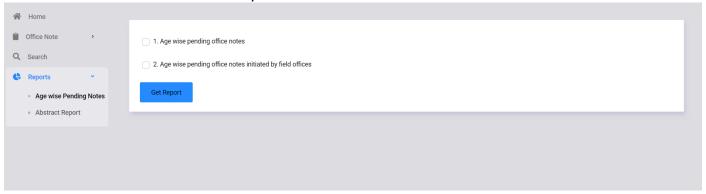
- Select Document Type.
- You can search office notes by using Document number, note type, subject or date.
- You can combine one or more search criteria.
- After entering search criteria, click on **Search** button.



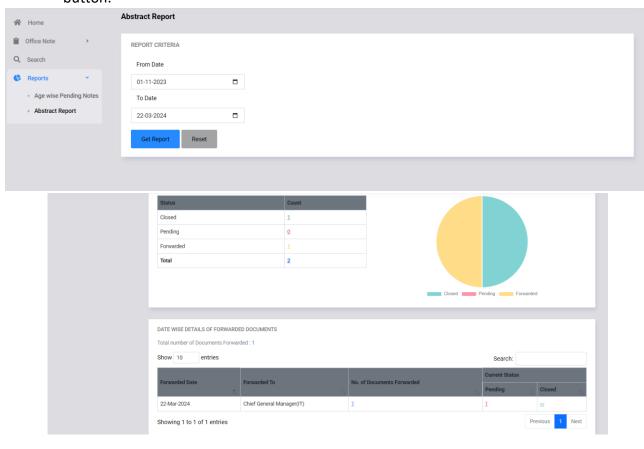
- List of office notes matching given search criteria will be shown as above.
- You can click on reference number to view office note details.
- You can search and view all office notes initiated or received under your office.
- For Confidential office note, you can view the office note only if you have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

10. Reports

- a. User can get age wise pending office notes report by clicking on **Age wise Pending Notes** menu. User has to tick required check box and then click on **Get Report** button. This report menu option is available only for Hon'ble CMD, Hon'ble Directors, all Heads of Departments and OSD to CMD.
 - (i) For Hon'ble CMD and OSD to CMD: The report will be generated for office notes pending with all Heads of the Departments.
 - (ii) For Hon'ble Directors: The report will be generated for office notes pending with the Heads of the Departments working under the respective Directors.
 - (iii) For all Heads of Departments: The report will be generated for office notes pending with all employees working under the respective Heads of Departments.
 - (iv) The report will be generated in XLSX format and will have separate tabs for summary and list.

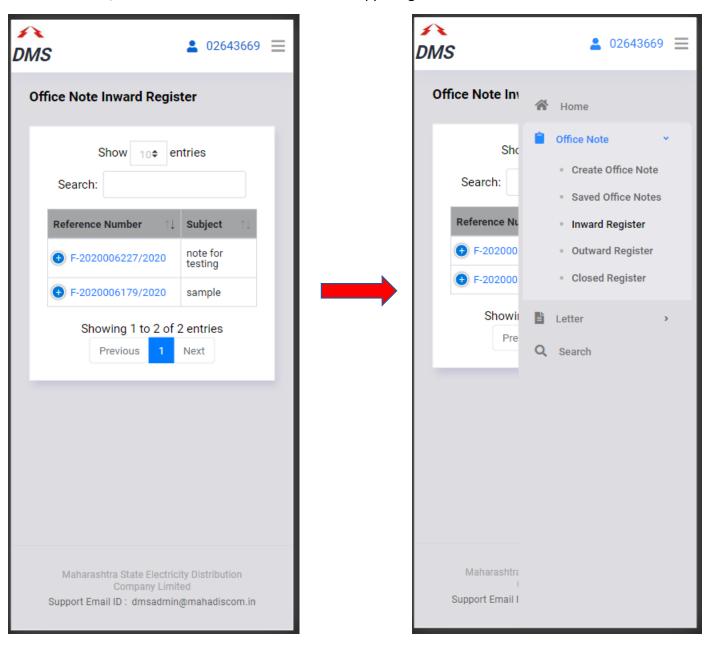


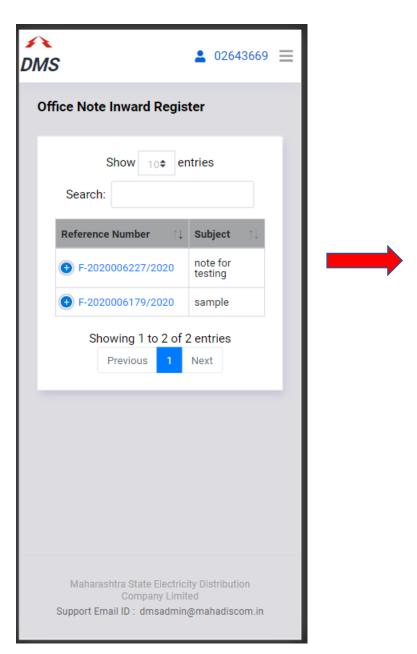
User can get abstract of office notes by clicking on Abstract Report menu.
 User has to select From Date and To Date is shown below and then click on Get Report button.

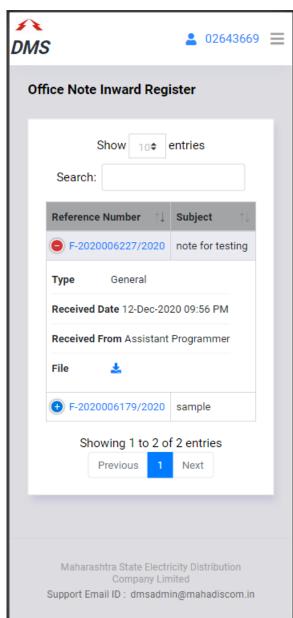


11. Mobile Compatibility

- 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 \equiv Menu icon on upper right corner as shown below.







On various list pages click on ¹ icon to view office note details, as shown above.