Quick Reference Guide for IC:

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- **Document Creation**
  - Go to **File Menu → Add Document→** A page will open give necessary information e.g. Reference No, Subject.
  - Click on **Document Attachments** Tag if needs to attached some documents(s)
  - Click on **Document Recipients** Tag (if needs to send to more then one person e.g. circular, Minutes of the Meetings.) →Then Click on **Add from Contact List** select Persons you wish to send the copy or Click on **Add New Recipients** if Person not available in Contact List.
  - Click **Save** Button.
  - The document will be now available at your Home Screen.

- **Forwarding Document by Noting.**
  - Open Document → Click on **Notings→Add Noting→** a Page will open for Noting→ Type your Noting→ Select Person to whom you wish to send the Document From the given below the Noting Box → Click **Forward** → a confirmation message will display click on **OK.**

- **Accepting Document**
  - Go to **H**ome **P**age → Click on Document(s) under the Section: **"DOCUMENTS PENDING FOR ACCEPTANCE"**
  - Document will open Click on **Accept Document.**

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- **Creating File Heading**
  - Go to **File Management** Menu → Click on **View Section File Headings** → Click on **Add→** Give Section Name, Heading Name, Heading Year→ Click on **Save** button

- **Creating File**
  - Go to **File Management** Menu→ click on **Create New File→** Provide the Following information, Main Heading, File Type, Subject, Initial Para No, File Reference No, etc.
  - Click on **Save** Button
  - Click on **Go to file Information page** for more operation on newly created file.

- **Attaching Documents to File.**
  - Open File → Click on **Correspondence** Tag→ then Click on **Attach Document→** List of available documents will be displayed→ Click check box of each document you want to attach to file→ Click **Attach** button given below.

- **Forwarding File**
  - Open File click on Add Noting at Top Right corner or → Click on **Marked Document** Tag→ then **Add Noting**
  - Page will be opened for Noting type your desired Noting→ Select Person to whom you wish to send the File from the List Given Below the Noting Box→ Press **Forward** button
  - Confirmation Message will be displayed Press **OK.**

- **Preparing DFA/Creating DFA versions**
  - Open desired File
  - Click on **Correspondence** Tag → from there Click on **Add DFA**
  - A DFA Preparation Screen will be Displayed
  - Provide required Information e.g. Subject, Issuance Date
  - Select Person/Designation from **From Person** drop down menu
  - Type body of the DFA in Text Box given below
  - Apply Desired **Template** from Drop Down menu.
  - Click on **Document Attachments** Tag if some documents needs to be attached or DFA is prepared in Ms-word or some other application
  - Browse for particular document → Click **Add Attachment**
  - Click on **Document Recipients** if DFA copy needs to be sent/circulated to more than one person. (Explained at Document Creation step above)
  - Click on **Save** button
  - DFA is now Created
  - Click on **Correspondence** Tag → then Click on **Prepare Case**
  - Select Work flow/Open work flow, Set **Priority**→ give response time
  - Choose **Approving Authority** from the drop down menu
  - List of Document attached to file will be displayed below
  - Check box will be given to each file select check box of file you want to Flag
  - Select Desired Flag from Drop Down Menu given in right side of each file
  - Press **Prepare Case** Button
  - Case is now Prepare; Forward it to concerned person by following steps given at **Forwarding File** explained above.

- **Creating DFA versions**
  - After Adding DFA to a file, and is submitted for approval, the approving authority may want to made some amendments or Instruct the concerned officer to made the amendments in that case a new version needs to be created of the same DFA..
  - To create a new version of DFA. Click on **Correspondence** Tag
  - Click on DFA whose new version needs to be created → Document Information Page will open→ from there Click on **View Document Details** → from there click on **Create New Version**
  - Same DFA will be opened for editing made desired editing and Press **Save** button→ new version is now created
  - To view previous version→ Go to **Document Information** Tag → Click on **View Document Version**→ all version will be displayed.

- **Approving DFA**
    - Go to **H**ome **P**age → Click on File under the Section: **"CASES AT YOUR DESK".** File opens, Noting page will be displayed.
    - Click on **Correspondence** Tab→ then Click on DFA Draft (Working Paper)
    - Open attachment, if OK
    - Click **Go to File Correspondence** Link → Click **Mark Documents** Link → Click **Approve/Disapprove Case** link
    - Select **Approve/Disapprove** from **"Status combo"** Box
    - Click **Save** Button

<u>Day-lll</u>

- **Issuing Document**

    - To issue a document created at above step (Document Creation Step)
    - Open document →**Document Information** page will be displayed→ Click on **Document Details**→ Document Details page will open→ Click on **Issue Document**→ **Issue Request** page will be open Provide **Action Required days**→ Press **launch Request** button.
    - Copy of Document will be sent to each recipient provided at Document Recipient stage (Explained above).

- **Case Preparation & Flagging Documents**
    - Open File upon which you want to create Case→ Add required Document to the file by following step given at "Attaching Document to File" explained above.
    - Click on **Correspondence** Tag → then Click on **Prepare Case**
    - Select Work flow/Open work flow, Set **Priority**→ give response time
    - Choose **Approving Authority** from the drop down menu
    - List of Document attached to file will be displayed below
    - Check box will be given to each file select check box of file you want to Flag
    - Select Desired Flag from Drop Down Menu given in right side of each file
    - Press **Prepare Case** Button
    - Case is now Prepare; Forward it to concerned person by following steps given at **Forwarding File** explained above.

- **Approving a Case**
    - Go to **H**ome **P**age → Click on File under the Section: **"CASES AT YOUR DESK".** File opens, Noting page will be displayed.
    - Click on **Correspondence** Tab→ then Click on DFA Draft (Working Paper)
    - Open attachment, if OK
    - Click **Go to File Correspondence** Link → Click **Mark Documents** Link → Click **Approve/Disapprove Case** link
    - Select **Approve/Disapprove** from **"Status combo"** Box
    - Click **Save** Button

- **Closing Case/Closing File**
    - Open File upon which case is open and needs to close the case
    - Click on **Marked Document** Tag → Click on **Close Case**
    - Confirmation message will be displayed press **OK**
    - Case is now close
    - To Close a file Click on **File Information** Tag → then click on **Close File**
    - Press **Close** button→ Confirmation message will be displayed → Press **OK.**
    - File is now closed.

- **Disposing Document**
    - Open Document under **Document Information** Tag Click **Dispose** Give Reason and Press **Dispose** Button.

<u>Day-lV</u>

- **Searching File**
    - Go to **File Management Menu** → Click on **Search**→ then **Search File**
    - Search Screen will be displayed with four options. i.e. File Reference No, Creation Date Between, Brief Subject, Keywords(Keywords is provided at file Creation stage).
    - Chose suitable option (one or more) and press **Search** Button
    - List of all files will be displayed that meats your search criteria.

- **Searching Document**
    - Go to **File Management Menu** → Click on **Search**→ then Search Document
    - Search Screen will be displayed with five options. i.e. Document No, Creation Date Between, Brief Subject, Created by, Document Type.
    - Type in relevant option box and press **Search** button.
    - List of all document will be displayed that meats your search criteria.

- **Creating Workflow**
    - Go to File Management Menu→ from there Click on **Workflow** → then Click on **Define Workflow**
    - Define workflow page will open, provide Workflow Name, Section Name, Choose users from left side list box and click arrow button to make them workflow Participants.
    - Click **Save** button
    - Go to File Management Menu → then **Manage Workflow** → Click on **Pending workflow** list of all pending workflow will be displayed, Click on workflow you want to Accept, Details of workflow will be displayed→ Click on **Save** button
    - Now workflow is ready for use.

- **Reports**
    - Go to **File Management** Menu → then **Reports** → from there Select **Document** for Documents related reports e.g. **Document Movement, Documents Pending Report**, **Wing Wise Correspondence Document Report** → from there give date from and date to report, Select Document of whom you want to generate report→ Press **View Report** button.
    - To Generate File based report repeat above step but this time Select Files instead of Documents.

- **Contacts**
    - To Add Contact at your Personal Contact Diary
    - Go to **Home Menu** Tag→ from there select **Personal Contact Diary**
    - To add new Contact Click on **Add Contact** provide Name, Designation etc and press **Save** button.
    - To edit already saved contact click on the Check box given in start of each contact and Press **Edit Contact,** made required changes and Press **Save** button.