MEMORANDUM TRACKING SYSTEM

-USER MANUAL-

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Introduction

System Overview:

Memorandum Tracking System is an internal web based application designed specifically to solve the needs of an automated memorandum tracking for the KSAU-HS and KAIMRC. The system will help in tracking memorandums throughout its life cycles and monitors it effectively using the system's reports, alerts, reminders and search mechanism.

System features are:

- Add Outgoing memorandum.
- Save memorandum draft for approval.
- Receive Incoming memorandum in the system.
- Add Incoming memorandum.
- Automated reference number generation.
- Add related memorandum to a main memorandum.
- Add memorandum links.
- Refer memos to respective personnel for further action.
- List department memorandums classified by its type (Incoming, Outgoing).
- List detail report of memorandums according to their status.
- View specific memorandum details and history.
- Update memorandum status and add history.
- Email notification to respective departments for outgoing memorandums/overdue memorandums/ updates on memorandums
- Search through memorandums using different filters.
- Add new department, employees.
- Customized reports

How to Use the System

Add New Memorandum:

a. Outgoing Memorandum:

After login your user name and password, in the Home page select **Register Memorandum** from the menu tab.

Click on **Outgoing memorandum** when you want to send a memo and you have the ability to access this system by filling the memorandum details.

After filling the fields you can select **Save Draft** if you want to save the memo to review and update the memo with the manager, the memo will be saved in the **Drafts** section in the home page and then you can send or delete the draft as required.

Or you can click on **Send Memo** option, then the system will send email containing memorandum details to respective department, and if respective department has access to the system, it will be added automatically into their incoming section.

When you sent a memo the system will automatically generate a reference number in the following format: Organization/City/Department Initials/Year/ Sequence, i.e. KSAU/RUH/ITS/2014/1.

Export to Excel

Reference No	Subject	Memo Date	Status	Due Date	From	To
KSAU/RUH/ITS/2014/5/15	teest	01/05/2014	Open	01/05/2014	IT Services Technology & Health Informatics, Ahmed Al Fawaz	IT Services Technology & Health Informatics, Mohammed Al Kalbe

b. Incoming Memorandum:

In this section you will be able to register incoming memorandums received from outside the organization or from departments that don't have access to the system by filling the memo details.

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View Memorandum list:

In the home page, select **Memorandum List** from the menu bar, the list of memorandum will displayed.

Advance Search:

To search through memorandums, click on **Show Filter** to open the search fields enter your search criteria then click **Apply Filter** button.

View/Edit Outgoing Memorandum:

Select **Memorandum List**, click on the memorandum name link from the outgoing memorandums, the memo page will display memo details:

a. Memo Template:

You can generate memo document in Microsoft Word by click on **Memo Template.**

b. Refer Memo:

To refer the memorandum for further processing select a **Refer Memo**, then identify the From, To, and the Action fields, also you can add more than one recipients.

When you press send directly will be saved in the history and the status of the memo will be changed to in process , except when you select "For Information" action, it will remain same status.

c. Add Related Memo:

If you want to send memo related to any other memo you can press **Add Related Memo** and follow same steps of outgoing memorandums ,the new memo will have same reference number of the main memo in addition to a sequence in the following format:

Main Reference No – Sequence

d. Add Memo Links:

You can link outgoing memorandum with any related memo you have in the system, by clicking on **Add Memo Link** , you can search memo in **Text to search** field. Check the memo you want to link and click **Add**, then it will be shown in history section.

View\Edit Incoming Memorandums:

a. Refer Memo:

To transfer the incoming memorandum for further processing select a **Refer Memo**, then identify the From, To, and the Action fields, also you can add more than one recipients. When you press send directly will be saved in the history and the status of the memo will be changed to in process , except when you select "For Information" action, it will remain same status.

b. Respond to Memo:

You will be able to add a memorandum respond to an incoming, it will link it to that incoming and follow the same steps of outgoing memorandums.

c. Add memo Links:

You can link incoming memorandum with any related memo you have in the system, by clicking on **Add Memo Link** , you can search memo in **Text to search** field. Check the memo you want to link and click **Add**, then it will be shown in history section.

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d. Follow Up:

You can do the follow up manually by clicking on Follow up button then click send.

Add New Department:

Click on Departments tab from the menu bar, then click on Add department and start fill up the fields then click save.

Edit/Delete Department:

To edit or delete a department click on **Departments** tab in the main page. A list of all departments will appear. you can use the search filter by clicking **Show Filter** to find the department you want to edit then click on the department name link, the department page will open displaying the department details.

1. You can delete the department and all its employees by clicking on **Delete Department** button.

2. To edit the department name or organization, add the new department name or organization then click on **Edit Department** button.

3. To add new employee click on **Add Employee** button and fill up the fields and click **Save.**

4. To edit/delete specific employee within the department click on the employee under the department list, and in the employee details page make the required changes then click **Edit** button.

Add User:

To add user, Click on **Admin Options** from the Home page. Then click **Add User**, type the user details then Click **Add User** button.

Edit User:

You can edit users by click on **Admin Options**, then **Users List** and select the name you want to edit then click edit

Reports:

You can generate custom reports based by filtering memo after select the status of memo you want to generate you can select **From** and **To** dates.

Or you can generate custom reports based on entered requirement , by selecting **Create New Report,** after that you can select the shown column and all memorandum filtering details.

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Report Display Options:

Available Columns:

```
Subject
Status
Memo Date
Due Date
From
To
CC
Confidential
Urgent
Last Comment
Added by
```

Selected Columns:

```
Subject
Status
Memo Date
Due Date
From
```

Add >

< Remove

Memorandum Filtering Options:

☐ Confidential   ☐ Urgent

Memo Type:	Outgoing Memorandum ▼	Memo Status:	Select Status ▼
From Department:	Select Department ▼	From Name:	Select Name ▼
To Department:	Select Department ▼	To Name:	Select Name ▼
Memo Date - From:	▦	Memo Date - To:	▦
Due Date - From:	▦	Due Date - To:	▦
Add by:	Select User ▼		

Submit   Clear