



Memorandum Tracking System

King Saud Bin Abdulaziz University for Health Sciences
Information Technology Services



MEMORANDUM TRACKING SYSTEM -USER MANUAL-



Memorandum Tracking System

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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



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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.

The screenshot displays the Memorandum Tracking System interface. At the top, there is a navigation menu with the following items: Home, Register Memorandum (highlighted with a red box and arrow), Memorandum List, Drafts, Departments, and Reports. Below the menu, there is a section for 'Recent Incoming Memorandums' with a list of items including 'KSAU/PR/2014/149 | Test Incoming', 'KSAU/RUH/REC/2014/4 | Testing', 'KSAU/RUH/REC/2014/3 | Testing', 'KSAU/RUH/REC/2014/2 | Testttttttttttttt', 'KSAU/RUH/REC/2014/1 | Testing Memorandum', 'KSAU/RUH/FIN/2014/2 | Test Memorandum', and 'KSAU/RUH/FIN/2014/1 | Testing Memo 1'. To the right, there is a section for 'Drafts for Review' with the message 'There is no drafts for your review.' Below these sections, there are three bar charts showing statistics for incoming, outgoing, and referred memorandums by status (Open, In-Process, Closed).

Status	Count
Open	1
In-Process	5
Closed	1

Status	Count
Open	13
In-Process	2
Closed	1

Status	Count
Open	0
In-Process	5
Closed	0

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.



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Confidential Urgent

From Department: * From Name: *

To Department: * To Name: * [Add Another Recipient](#)

Subject: * Memo Date:

Memo Body:

Memo Status: Due Date:

Follow up Frequency: Remarks:

CC Department: CC Name: [Add Another Recipient](#)

Attachment: No file chosen

Send email notification

[Save Draft](#) [Send Memo](#) [Clear](#)

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



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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.

The screenshot displays the 'Memorandum Tracking System' interface. At the top, there is a navigation menu with 'Home', 'Register Memorandum', 'Memorandum List', 'Drafts', 'Departments', and 'Reports'. The 'Register Memorandum' tab is active. Below the navigation, the page title is 'Memorandum Tracking System' and the user is identified as 'Nora AlFaris'. The main content area is titled 'Home / Register Incoming Memorandum' and contains the following form fields:

- Confidential Urgent
- Reference Number: *
- From Department: * From Name: *
- To Department: * To Name: * [Add Another Recipient](#)
- Subject: * Memo Date:
- Memo Status: Due Date:
- Follow up Frequency: Remarks:
- CC Department: CC Name: [Add Another Recipient](#)
- Attachment: No file chosen
- Send email notification
-



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View Memorandum list:

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

Home Register Memorandum **Memorandum List** Drafts Departments Reports

Home / Outgoing Memorandum List

Show Filters 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
KSAU/RUH/ITS/2014/4/14-1	test	30/04/2014	Open		Student Affairs - College of Nursing - AlAhsa, Arwa Al Hamad	Student Affairs - College of Nursing - AlAhsa, Arwa Al Hamad
KSAU/RUH/ITS/2014/4/14	test	30/04/2014	Open	06/05/2014	IT Services Technology & Health Informatics, Dr. Bandar S. Al Haqbani	Research Unit, Dr. Mowafa Houesah Security - Jeddah, Abdulraheem Abuzaglah
KSAU/RUH/ITS/2014/13	test	28/04/2014	Open		Postgraduate Training Center, Abdulrahman AL Taweel	Property Management, Fahad Al Anezi
KSAU/RUH/ITS/2014/12	test	23/04/2014	Open		President's Office , Abdulhameed Al Swaidi	Property Management, Fahad Al Anezi
KSAU/RUH/ITS/2014/11-1	test	23/04/2014	Open		IT Services Technology & Health Informatics, Abdulaziz Al Hazzaa	President's Office , Abdulhameed Al Swaidi
KSAU/RUH/ITS/2014/11	Testing Memo	22/04/2014	In-Process		IT Services Technology & Health Informatics, Amal AlThabit	Recruitment, Fahad Al Marri
KSAU/RUH/ITS/2014/10	test 123456789	07/04/2014	Open	14/04/2014	IT Services Technology & Health Informatics, Ahmed Al Fawaz	Scholarship Department, Abeer Al Husayni

Advance Search:

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

Home / Outgoing Memorandum List

Hide Filters

All Memorandums Select Department

From: To:

Text to Search: Apply Filter 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
KSAU/RUH/ITS/2014/4/14-1	test	30/04/2014	Open		Student Affairs - College of Nursing - AlAhsa, Arwa Al Hamad	Student Affairs - College of Nursing - AlAhsa, Arwa Al Hamad
KSAU/RUH/ITS/2014/4/14	test	30/04/2014	Open	06/05/2014	IT Services Technology & Health Informatics, Dr. Bandar S. Al Haqbani	Research Unit, Dr. Mowafa Houesah Security - Jeddah, Abdulraheem Abuzaglah
KSAU/RUH/ITS/2014/13	test	28/04/2014	Open		Postgraduate Training Center, Abdulrahman AL Taweel	Property Management, Fahad Al Anezi
KSAU/RUH/ITS/2014/12	test	23/04/2014	Open		President's Office , Abdulhameed Al Swaidi	Property Management, Fahad Al Anezi
KSAU/RUH/ITS/2014/11-1	test	23/04/2014	Open		IT Services Technology & Health Informatics, Abdulaziz Al Hazzaa	President's Office , Abdulhameed Al Swaidi
KSAU/RUH/ITS/2014/11	Testing Memo	22/04/2014	In-Process		IT Services Technology & Health Informatics, Amal AlThabit	Recruitment, Fahad Al Marri
KSAU/RUH/ITS/2014/10	test 123456789	07/04/2014	Open	14/04/2014	IT Services Technology & Health Informatics, Ahmed Al Fawaz	Scholarship Department, Abeer Al Husayni



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The screenshot displays the 'Memorandum List' page of the Memorandum Tracking System. A red arrow labeled '1' points to the 'Refer Memo' button in the top navigation bar. A modal dialog box titled 'Refer Memorandum' is open, containing the following fields and buttons:

- From:** Select Department (dropdown), Select Name (dropdown)
- To:** Select Department (dropdown), Select Name (dropdown), Add Another Recipient (button)
- Action:** Select Action (dropdown)
- Remarks:** Text area
- Buttons:** Send, Clear

Below the dialog box, a table shows the history of memos:

Logged By	Status	Comments	Due Date	Attachment	Time Stamp
jarallah Alaraifi	Open	test	01/05/2014		5/1/2014 9:06:30 AM

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



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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.

Memorandum Tracking System

Add Memorandum Links

Outgoing Memorandums Text to Search: Search

Reference No	Subject	Memo Date	From	To
<input type="checkbox"/> KSAU/RUH/ITS/2014/17	test	05/05/2014	Postgraduate Education, Abdullah Abu Aleid	Postgraduate Training Center, Abdulrahman AL Taweel
<input type="checkbox"/> KSAU/RUH/ITS/2014/16	test 2	05/05/2014	IT Services Technology & Health Informatics, Jarallah Al Arifi	Administrative & Financial Affairs, Michele Somera Faculty & Staff Relations, Sheena B. Estole
<input type="checkbox"/> KSAU/RUH/ITS/2014/5/15	teest	01/05/2014	IT Services Technology & Health Informatics, Ahmed Al Fawaz	IT Services Technology & Health Informatics, Mohammed Al Kalbe
<input type="checkbox"/> KSAU/RUH/ITS/2014/4/14-1	test	30/04/2014	Student Affairs - College of Nursing - AlAhsa, Arwa Al Hamad	Student Affairs - College of Nursing - AlAhsa, Arwa Al Hamad
<input type="checkbox"/> KSAU/RUH/ITS/2014/4/14	test	30/04/2014	IT Services Technology & Health Informatics, Dr. Bandar S. Al Haqbani	Research Unit, Dr. Mowafa Houesah Security - Jeddah, Abdurraheem Abuzaglah
<input type="checkbox"/> KSAU/RUH/ITS/2014/13	test	28/04/2014	Postgraduate Training Center, Abdulrahman AL Taweel	Property Management, Fahad Al Anezi
<input type="checkbox"/> KSAU/RUH/ITS/2014/12	test	23/04/2014	President's Office, Abdulhameed Al Swaidi	Property Management, Fahad Al Anezi

Add Cancel

Add Memo Links Follow up



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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.

The screenshot displays the 'Memorandum Tracking System' interface. The main menu includes 'Home', 'Register Memorandum', 'Memorandum List', 'Drafts', 'Departments', and 'Reports'. The current page is 'Memorandum List / test'. A red arrow points to the 'Refer Memo' button, which is highlighted with a '1'. Below the main menu, there are buttons for 'Refer Memo', 'Respond to Memo', 'Add Memo Links', and 'Follow up'. The 'Refer Memo' dialog box is open, showing fields for 'From' (Select Department, Select Name), 'To' (Select Department, Select Name), 'Action' (Select Action), and 'Remarks'. There is an 'Add Another Recipient' button next to the 'To' field. The dialog box also has 'Send' and 'Clear' buttons at the bottom. The background shows a memo with subject 'test', reference number 'fin/2014/4', and sender 'Dr. Abdulkader Al Jarrah'.

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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Admin Options Help Guide Nora AlFaris

Add Memorandum Links

Incoming Memorandums Text to Search: Search

Reference No	Subject	Memo Date	From	To
<input checked="" type="checkbox"/> fin/2014/4	test	04/05/2014	Prosthodontics - College of Dentistry, Dr. Abdulkader Al Jarrah	Prosthodontics - College of Dentistry, Dr. Abdulkader Al Jarrah
<input type="checkbox"/> 102450210	testtttttttt	01/05/2014	IT Services Technology & Health Informatics, Jarallah Al Arifi	IT Services Technology & Health Informatics, Ahmed Al Fawaz
<input type="checkbox"/> KSAU/RUH/ITS/2014/5/15	teest	01/05/2014	IT Services Technology & Health Informatics, Ahmed Al Fawaz	IT Services Technology & Health Informatics, Mohammed Al Kalbe
<input type="checkbox"/> rtrgrgrg	rgregrg	07/04/2014	Pharmaceutical Sciences Department - College of Pharmacy, Dr. Mahmoud Mansour	Pharmacy Practice Department - College of Pharmacy, Dinah Poral
<input type="checkbox"/> KSAU/PR/2014/149	Test Incoming	17/04/2014	Public Relations, Faisal Bin Ghayth	IT Services Technology & Health Informatics, Dr. Bandar S. Al Haqbani
<input type="checkbox"/> KSAU/RUH/REC/2014/4	Testing	22/04/2014	Recruitment, Omar Al Adwan	IT Services Technology & Health Informatics, Dr. Bandar S. Al Haqbani
<input type="checkbox"/> KSAU/RUH/REC/2014/3	Testing	22/04/2014	Recruitment, Nouf Al Muhanna	IT Services Technology & Health Informatics, Ahmed Al Fawaz

Add Cancel

12

1

Add Memo Links Follow up

Abdulkader Al Jarrah

5:52 AM

d. Follow Up:

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

Follow up

To: althabitam@ngha.med.sa;

CC: althabitam@ngha.med.sa; alfarisno@ngha.med.sa;

Subject: Follow up: KSAU/RUH/ITS/2014/17 - test

Email body: This has reference to memorandum reference number: KSAU/RUH/ITS/2014/17 dated 05/05/2014 regarding the above-mentioned subject. Please be informed that to-date, we have not received your response. Therefore, you are kindly requested to provide us your feedback as soon as possible.

Send Cancel

1

2

Add Related Memo Add Memo Links Follow up

014/17

ining Center, Abdulrahman AL Taweel

Time Stamp



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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.

The screenshot shows the 'Memorandum Tracking System' interface. The navigation menu includes 'Home', 'Register Memorandum', 'Memorandum List', 'Drafts', 'Departments', and 'Reports'. The 'Departments' tab is highlighted with a red box and labeled '1'. Below the menu, the breadcrumb 'Home / Department List' is shown with a '2' next to it. A green 'Add Department' button is highlighted with a red box. Below the button is a 'Show Filters' link. A table lists existing departments with columns for 'Department Name' and 'Organization'.

Department Name	Organization
Academic & Student Affairs - College of Applied Medical Sciences	KSAU-HS
Academic & Student Affairs - College of Applied Medical Sciences - AlAhsa	KSAU-HS
Academic & Student Affairs - College of Dentistry	KSAU-HS
Academic & Student Affairs - College of Medicine	KSAU-HS
Academic & Student Affairs - College of Medicine- Jeddah	KSAU-HS
Academic & Student Affairs - College of Nursing	KSAU-HS
Academic & Student Affairs - College of Pharmacy	KSAU-HS

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.

The screenshot shows the 'Memorandum Tracking System' interface. The navigation menu includes 'Home', 'Register Memorandum', 'Memorandum List', 'Drafts', 'Departments', and 'Reports'. The 'Departments' tab is highlighted. Below the menu, the breadcrumb 'Home / Department List / Academic & Student Affairs - College of Applied Medical Sciences' is shown. There are four input fields: 'Organization' (KSAU-HS), 'Department Name' (Academic & Student Affairs - Col), 'Department Email' (althabitam@ngha.med.sa), and 'Region' (Riyadh). Below the fields is a 'Department Employees:' section with a table listing employees. At the bottom, there are three buttons: 'Add Employee', 'Edit Department', and 'Delete Department'.

Name	Title	Email
Abdul Qayyum Aslam	Assessment Coordinator	althabitam@ngha.med.sa
Dr. Majid Al Salamah	Associate Dean	althabitam@ngha.med.sa
Elmer Daus	Administrative Assistant	althabitam@ngha.med.sa
Fahad Al Mahmoud	Administrative Coordinator	althabitam@ngha.med.sa
Prof. Ali Karrar Osman	Professor	althabitam@ngha.med.sa
Rihan Hassan Balobaid	Administrative Assistant	althabitam@ngha.med.sa
Rowena P. Malate	Administrative Assistant	althabitam@ngha.med.sa
Shoeb Abdulbasith Qureshi	Assistant Professor	althabitam@ngha.med.sa
Syed Alamdar Shah	Assessment Coordinator	althabitam@ngha.med.sa



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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.

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Admin Options Help Guide Nora AlFaris

Home Register Memorandum Memorandum List Drafts Departments Reports

Home / Administrator Options

Actions:

+ Add User

Users List

Department Details

Memorandum Tracking System

Admin Options Help Guide Nora AlFaris

Home Register Memorandum Memorandum List Drafts Departments Reports

Home / Administrator Options / Add User

Please Complete User Details:

Username: *

Access Type: *

Name: *

Title: *

Department: *

Email: *

Ext:

Add User Clear



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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

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Admin Options Help Guide Nora AlFaris

Home Register Memorandum Memorandum List Drafts Departments Reports

Home / Administrator Options

Actions:

- + Add User
- Users List
- Department Details

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Admin Options Help Guide Nora AlFaris

Home Register Memorandum Memorandum List Drafts Departments Reports

Home / Administrator Options / Edit User

Edit User Information

Username: ALKALBEMO

Access Access Type

User Access: * IT Services Administrator Edit Remove

Name: * Mohammad AlKalbe

Title: * Programmer

Department: * IT Services Technology & He

Email: * alkalbemo@ngha.med.sa

Ext: 4444

Edit Delete

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.



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The screenshot shows the 'Memorandum Tracking System' interface. At the top, there is a navigation menu with 'Home', 'Register Memorandum', 'Memorandum List', 'Drafts', 'Departments', and 'Reports'. The 'Reports' tab is selected. Below the navigation, there are three columns of report categories: 'Outgoing Memorandums Reports', 'Incoming Memorandums Reports', and 'Referred Memorandums Reports'. Each column lists 'Open Memorandums', 'In-Process Memorandums', 'Closed Memorandums', and 'Overdue Memorandums'. A green button labeled 'Create New Report' is located at the bottom left. A 'Report Options' dialog box is open in the center, featuring 'Date From:' and 'To:' input fields with calendar icons, and a 'Submit' button.

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.

This screenshot is similar to the one above, showing the 'Memorandum Tracking System' interface. The 'Reports' tab is selected. The 'Create New Report' button is highlighted with a red rectangular box, and a red arrow points to it from the right. The rest of the interface, including the navigation menu and report categories, is identical to the previous screenshot.



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Home / Reports / New Report

Report Display Options:

Available Columns:

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

Add >

< Remove

Selected Columns:

Subject
Status
Memo Date
Due Date
From

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