Correspondence Management System

System Manual

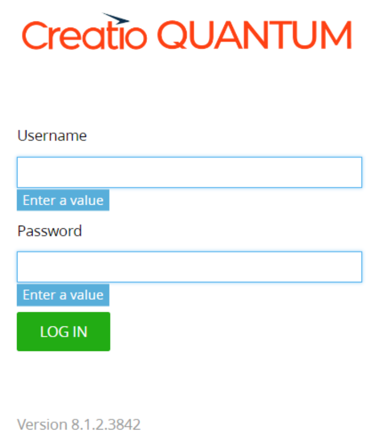
Contents

Chapter 1 : Correspondence Management System – Pre-requisite

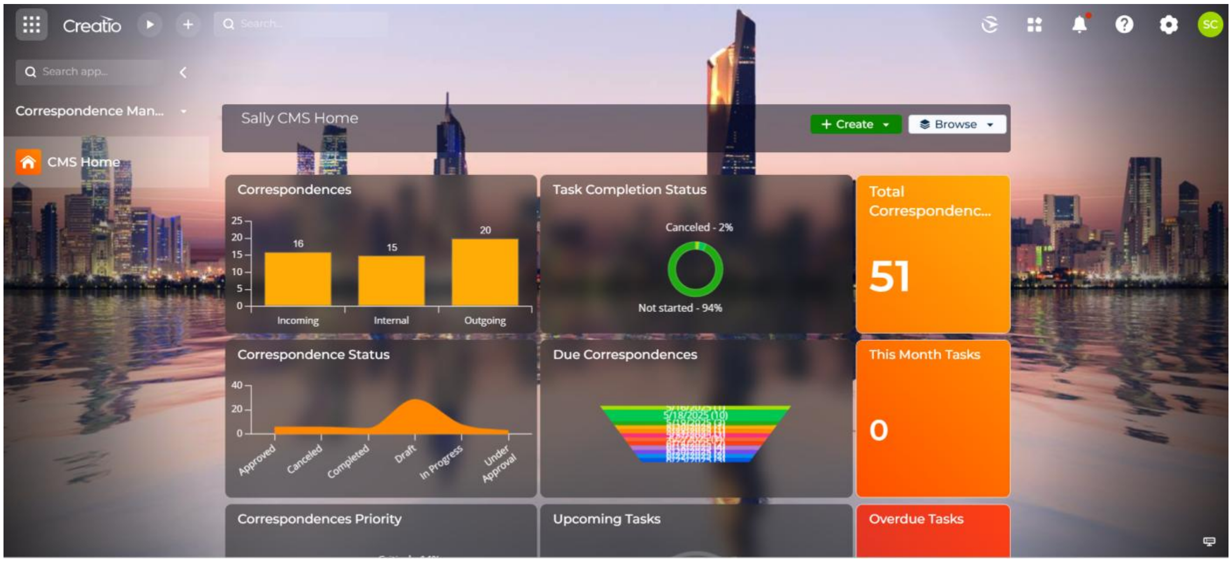
- Please ensure that Microsoft Office 360 is installed before starting the installation process.
- Ensure that the templates for both internal and outgoing correspondences are uploaded.
- Ensure that all required lookups are completed and the administrative settings are properly configured.

Chapter 2 : Correspondence Management System – Desktop

1. Log in to the system and enter your username and password.



2. On the Desktop Page, you will find a summary of all metadata related to the compliance management system.

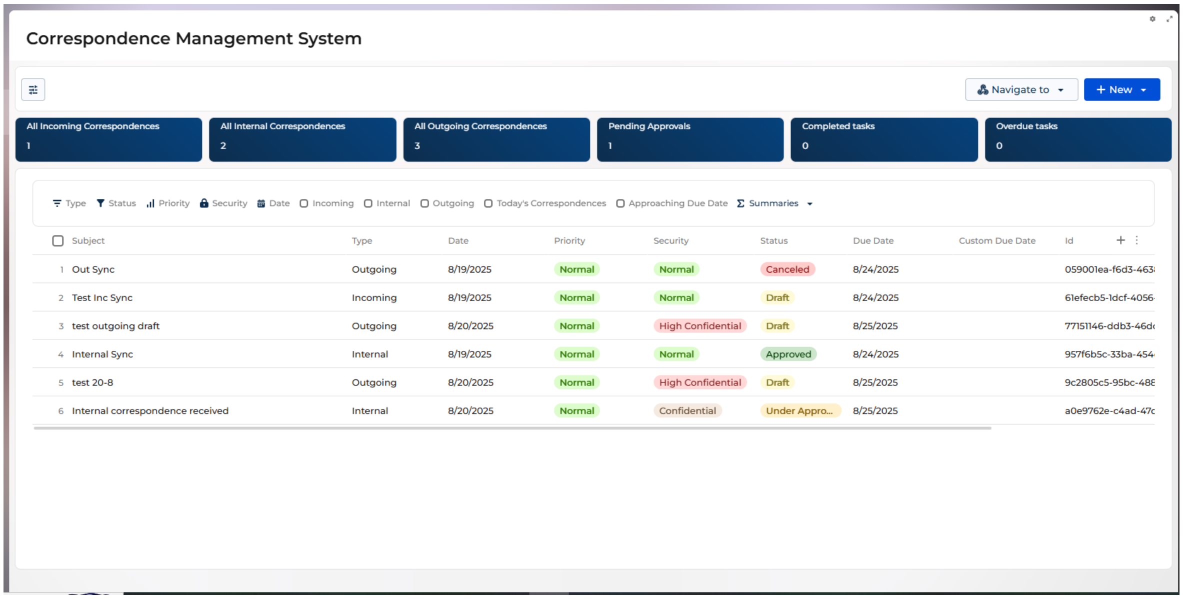


Chapter 3: Correspondence Management System- Home

On the **List** page of the **Correspondence Management** module, you will find a set of **metric dashboards** that provide a quick overview of correspondence activity within the system. These dashboards display real-time counts of all **Incoming**, **Internal**, and **Outgoing** correspondences.

In addition to correspondence volumes, the dashboard also highlights key workflow metrics, including:

- **Pending Approvals** – Correspondences that are awaiting review or authorization.
- **Completed Tasks** – Actions or tasks that have been finalized within the correspondence lifecycle.
- **Overdue Tasks** – Items that have passed their due date and require immediate attention.



On the **List** page, you will find all created correspondence records, each displayed with key details to help you quickly identify, filter, and manage correspondence effectively. This comprehensive view enables users to monitor and sort items based on urgency, security level, status, and other relevant criteria, supporting efficient tracking and timely follow-up.

You can filter the list based on the following attributes:

- **Type** – Incoming, Internal, or Outgoing
- **Creation Date**
- **Priority**
- **Security Level**
- **Status**
- **Today's Correspondences** – View items created on the current date
- **Approaching Due Date** – Identify correspondences nearing their deadline

From the **Correspondence Management System** homepage, you will find three primary action buttons: **"New"**, **"Navigate To" and "Admin Settings".**

- **New**: Click this button to create a new correspondence, regardless of its type (Incoming, Internal, or Outgoing). This provides a quick and centralized way to initiate new records.
- **Navigate To**: Use this button to access specific folders where each type of correspondence is organized in its appropriate category. This helps users quickly locate and manage existing correspondences based on their classification.
- **Admin Settings:** This section will be covered in Chapter 2.

Chapter 4 : Correspondence Management System- Admin Settings

Section 1: Org Structure

1. Navigate to the **Org Structure** tab under the **Admin Settings** section in the Correspondence Management System Homepage.
2. Configure the following components related to correspondence management: **Units**, **Root Unit and Committees Assignment**, and **Employees List**.

- **Units**: To configure the units involved in the correspondence system, go to the **Lookups** and search for **Organization Structure Items**. Begin by entering the department name, selecting its head, and specifying its parent department. The full department name will be generated automatically. Once the information is saved, return to the **Org Structure** tab in Admin Settings and refresh the table. The newly entered data will now appear.
- **Root Unit and Committees Assignment**: After adding departments in the **Organization Structure Items**, the unit names will appear in the Org Structure table with a default "NA" unit short code. To edit the code, click the **Edit** button next to the respective entry. Within the same table, you can also designate whether a unit is a **committee** or a **Root Unit** by selecting the appropriate option.
- **Employees List**: In this table, you can add company employees by clicking the **+** button. Fill in the required metadata, including the employee's organizational unit, direct manager, job title, and full job title.

Section 2: System Settings

1. Navigate to the **System Settings** tab under the **Admin Settings** section.
2. Configure the correspondence management settings by enabling the options that best suit your organization's workflow:
    - **Incoming Correspondence Default Creator Role**: Enable this option if incoming correspondences are typically received by a registrar unit. Leave it disabled if individual departments handle their own incoming correspondences.
    - **Correspondence Reference Entry Method**: To manually enter reference numbers, check the **Manual Reference** option and click **Save**.
    - **Correspondence Reference Components**: Specify a prefix for each correspondence type. To include the year in the reference number, select the **Include Year** checkbox, choose the number of digits to display, and save your changes.
    - **Reference per Unit**: If this option is enabled, ensure that only **Departments** are selected. Do not activate this setting for **Sections**, **Sectors**, or the **Root Unit**.

Section 3: Templates Management

1. Navigate to the **Templates Management** tab under the **Admin Settings** section.
2. Configure the Correspondence Management templates for both internal and outgoing correspondences:
   - **Internal Correspondence Template**: Click the **+** button to add a new template. Enter the template name, specify the associated unit, and upload or define the template document.
   - **Outgoing Correspondence Template**: Click the **+** button to create a new template. Provide the template name, select the relevant unit, and upload or define the template document.

Section 4: Communication Rules

1. Navigate to the **Communication Rules** tab under the **Admin Settings** section.
2. Configure the **Correspondence Management Communication Rules**:
   - Click the **+** button in the communication rules table to add a new rule. Select the **source unit** and the **destination unit** to define the allowed communication path.

Chapter 5: Correspondence Management System- Creation

From the New button on the left side of the homepage, create a new correspondence.

Section 1: Incoming Correspondence

Step 1: Incoming Correspondence Creation Page

- Go to the **New Folder** section.
- Click the **Incoming Correspondence** button.
- The **Incoming Correspondence Creation** page will open.

Step 2: Fill in the Metadata Fields

Complete the required metadata fields with the relevant information:

- **Subject:** (Required) Enter the subject or title of the correspondence.
- **Date**: (Optional) Specify the date the correspondence was received.
- **From**: (Required) Select the sender from the dropdown list.
- **To**: (Required) Select the recipient from the dropdown list.
- **Source Reference**: (Optional) Manually input the source reference.
- **Priority**: (Optional) Choose the priority level (Normal, Critical, Urgent).
- **Security**: (Optional) Select the security classification (Norma, Confidential, High Confidential).
- **Due Date:** This field is automatically populated based on the selected priority.
- **Custom Due Date**: (Optional) Enter a custom due date, if applicable.
- **Remarks**: (Optional) Add any additional comments or notes regarding the correspondence.

Step 3: Save and Finalize

- Click **Save** to store the incoming correspondence record.
- Click the **Generate Reference** button (located next to the reference field) to create and assign a unique reference number to the record.
- Add any **related correspondences** associated with this record (if available).
- Press the **Send** button to forward the correspondence to the appropriate recipients.

Step 4: Open the Incoming Correspondence Folder

- Navigate to the **Correspondence Home** page.
- Click on the **"Navigate to"** folder.
- Go to the **Incoming Correspondence** folder to locate and open the record you created.

Step 5: View and Manage the Correspondence Record

- Open the created record. All previously entered metadata will be displayed in **read-only mode** on the left side of the page.
- The **stage** of the record will be set to **"In Progress"** (since it has already been sent).
- To add **CC Members**:
  - Click the **Carbon Copy** button located in the center of the page.
  - Select whether to send the copy to an **employee** or a **unit**.
  - The added records will appear in the **CC Members** list at the bottom of the page

- To add **Transfer Members**:
  - Click the **Transfers** button located in the center of the page.
  - Choose whether the correspondence is sent to an **employee** or a **unit**.
  - Specify the **purpose of the transfer**, the **due date**, and the **action description**.
  - The added records will appear in the **Transfers** list at the bottom of the page

- To **Link** a Correspondence:
  - Click the **Link** button on the correspondence page.
  - Select the **related correspondence** from the list; its metadata will be displayed in a table.
  - Click the **Link** button to associate the selected correspondence with the current record.
  - The added records will appear in the **Related Correspondences** list in the **Tracking tab**.

- To Add a **Task:**
  - Click the **Add Task** button on the correspondence page.
  - Select the **type of task** you want to create (e.g., Task, Email, or Call).
  - Complete the task's **metadata fields**, including any required details.
  - Click **Save** to add the task to the correspondence.
  - The added task will appear in the **Active Tasks** list at the bottom of the page.
  - You can also track the task or view related activity in the **Tasks Log** under the **Tracking tab.**

- To Add **Attachments**
  - Click the **Attachments** icon on the correspondence page.
  - Upload the document you wish to attach by selecting it from your device or by dragging and dropping it into the upload area.

- To Add a **Feed** Message
  - Click the **Feed** icon on the correspondence page.
  - Enter your message in the provided text box and post it to add updates or comments related to the correspondence.

- **Next Step**
  - Click the **Flag** icon on the correspondence page.
  - The next steps related to the created correspondence will be displayed in a side panel for your review and action.

Step 6: Incoming Correspondence - Final step

After completing all actions related to the correspondence, you have the following options:

- Click **Complete** to finalize the correspondence. This will change its status to **Completed**.
- Click **Return** to send the correspondence back. The status will then update to **Returned**.
- Click **Respond** to reply to the correspondence. You will be prompted to select the type of response you want to send.

Section 2: Outgoing Correspondence

Step 1: Outgoing Correspondence Creation Page

- Go to the **New Folder** section.
- Click the **Outgoing Correspondence** button.
- The **Outgoing Correspondence Creation** page will open.

Step 2: Fill in the Metadata Fields

Complete the required metadata fields with the relevant information:

- **Subject:** (Required) Enter the subject or title of the correspondence.
- **Date**: (Optional) Specify the date the correspondence was received.
- **From**: (Required) Select the sender from the dropdown list.
- **To**: (Required) Select the recipient from the list.
- **Template**: Choose the template from the dropdown list.
- **Priority**: (Optional) Choose the priority level (Normal, Critical, Urgent).
- **Security**: (Optional) Select the security classification (Norma, Confidential, High Confidential).
- **Due Date:** This field is automatically populated based on the selected priority.
- **Custom Due Date**: (Optional) Enter a custom due date, if applicable.
- **Remarks**: (Optional) Add any additional comments or notes regarding the correspondence.
- **Body**: (Optional) Enter the body of the correspondence.

Step 3: Save and Finalize

- Click **Save** to store the Outgoing correspondence record.
- Click the **Generate Reference** button (located next to the reference field) to create and assign a unique reference number to the record.
- Click the **Generate Draft** button to generate a template based on the template and the document will appear in the attachment tab on the right side.
- Add any **related correspondences** associated with this record (if available).
- Press the **Send for approval** button to send the correspondence to the appropriate recipients.

Step 4: Open the Outgoing Correspondence Folder

- Navigate to the **Correspondence Home** page.
- Click on the **"Navigate to"** folder.
- Go to the **Outgoing Correspondence** folder to locate and open the record you created.

Step 5: View and Manage the Correspondence Record

- Open the created record. All previously entered metadata will be displayed in **read-only mode** on the left side of the page.
- The **stage** of the record will be set to **"Under Approval"** (since it has already been sent for approval).
- To add **CC Members**:
  - Click the **Carbon Copy** button located in the center of the page.
  - Select whether to send the copy to an **employee** or a **unit**.
  - The added records will appear in the **CC Members** list at the bottom of the page

- To add **Transfer Members**:
  - Click the **Transfers** button located in the center of the page.
  - Choose whether the correspondence is sent to an **employee** or a **unit**.
  - Specify the **purpose of the transfer**, the **due date**, and the **action description**.
  - The added records will appear in the **Transfers** list at the bottom of the page

- To **Link** a Correspondence:
  - Click the **Link** button on the correspondence page.
  - Select the **related correspondence** from the list; its metadata will be displayed in a table.
  - Click the **Link** button to associate the selected correspondence with the current record.
  - The added records will appear in the **Related Correspondences** list in the **Tracking tab**.

- To Add a **Task:**
  - Click the **Add Task** button on the correspondence page.
  - Select the **type of task** you want to create (e.g., Task, Email, or Call).
  - Complete the task's **metadata fields**, including any required details.
  - Click **Save** to add the task to the correspondence.
  - The added task will appear in the **Active Tasks** list at the bottom of the page.

  - You can also track the task or view related activity in the **Tasks Log** under the **Tracking tab.**

- To Add **Attachments**
  - Click the **Attachments** icon on the correspondence page.
  - Upload the document you wish to attach by selecting it from your device or by dragging and dropping it into the upload area.

- To Add a **Feed** Message
    - Click the **Feed** icon on the correspondence page.
    - Enter your message in the provided text box and post it to add updates or comments related to the correspondence.

- **Next Step**
    - Click the **Flag** icon on the correspondence page.
    - The next steps related to the created correspondence will be displayed in a side panel for your review and action.

Step 6: Outgoing Correspondence - Final step

After completing all actions related to the correspondence, you have the following options:

- Click **Complete** to finalize the correspondence. This will change its status to **Completed**.

Section 3: Internal Correspondence

Step 1: Internal Correspondence Creation Page

- Go to the **New Folder** section.
- Click the **Internal Correspondence** button.
- The **Internal Correspondence Creation** page will open.

Step 2: Fill in the Metadata Fields

Complete the required metadata fields with the relevant information:

- **Subject:** (Required) Enter the subject or title of the correspondence.
- **Date**: (Optional) Specify the date the correspondence was received.
- **From**: (Required) Select the sender from the dropdown list.
- **To**: (Required) Select the recipient from the list.
- **Template**: Choose the template from the dropdown list.
- **Priority**: (Optional) Choose the priority level (Normal, Critical, Urgent).
- **Security**: (Optional) Select the security classification (Norma, Confidential, High Confidential).
- **Due Date:** This field is automatically populated based on the selected priority.
- **Custom Due Date**: (Optional) Enter a custom due date, if applicable.
- **Remarks**: (Optional) Add any additional comments or notes regarding the correspondence.
- **Body**: (Optional) Enter the body of the correspondence.
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Step 3: Save and Finalize

- Click **Save** to store the Internal correspondence record.
- Click the **Generate Reference** button (located next to the reference field) to create and assign a unique reference number to the record.
- Click the **Generate Draft** button to generate a template based on the template and the document will appear in the attachment tab on the right side.
- Add any **related correspondences** associated with this record (if available).
- Press the **Send for approval** button to send the correspondence to the appropriate recipients.

Step 4: Open the Internal Correspondence Folder

- Navigate to the **Correspondence Home** page.
- Click on the **"Navigate to"** folder.
- Go to the **Internal Correspondence** folder to locate and open the record you created.

Step 5: View and Manage the Correspondence Record

- Open the created record. All previously entered metadata will be displayed in **read-only mode** on the left side of the page.
- The **stage** of the record will be set to **"Under Approval"** (since it has already been sent for approval).
- To add **CC Members**:
    - Click the **Carbon Copy** button located in the center of the page.
    - Select whether to send the copy to an **employee** or a **unit**.
    - The added records will appear in the **CC Members** list at the bottom of the page

- To add **Transfer Members**:
    - Click the **Transfers** button located in the center of the page.
    - Choose whether the correspondence is sent to an **employee** or a **unit**.
    - Specify the **purpose of the transfer**, the **due date**, and the **action description**.
    - The added records will appear in the **Transfers** list at the bottom of the page

- To **Link** a Correspondence:
    - Click the **Link** button on the correspondence page.
    - Select the **related correspondence** from the list; its metadata will be displayed in a table.
    - Click the **Link** button to associate the selected correspondence with the current record.
    - The added records will appear in the **Related Correspondences** list in the **Tracking tab**.

- To Add a **Task:**
    - Click the **Add Task** button on the correspondence page.
    - Select the **type of task** you want to create (e.g., Task, Email, or Call).
    - Complete the task's **metadata fields**, including any required details.
    - Click **Save** to add the task to the correspondence.
    - The added task will appear in the **Active Tasks** list at the bottom of the page.

    - You can also track the task or view related activity in the **Tasks Log** under the **Tracking tab.**

- To Add **Attachments**
    - Click the **Attachments** icon on the correspondence page.
    - Upload the document you wish to attach by selecting it from your device or by dragging and dropping it into the upload area.

- To Add a **Feed** Message
  - Click the **Feed** icon on the correspondence page.
  - Enter your message in the provided text box and post it to add updates or comments related to the correspondence.

- **Next Step**
  - Click the **Flag** icon on the correspondence page.
  - The next steps related to the created correspondence will be displayed in a side panel for your review and action.

Step 6: Internal Correspondence - Final step

After completing all actions related to the correspondence, you have the following options:

- Click **Complete** to finalize the correspondence. This will change its status to **Completed**.