Bundelkhand University, Jhansi

**User's Guide
File Tracking System**

Contents

Instructions for Using Web Based "File Tracking System"

Login to File Tracking System

- Type the URL**https://ums.bujhansi.org/buJhansi_lms/LMS/Index** on browser to open login panel of "File Tracking System".
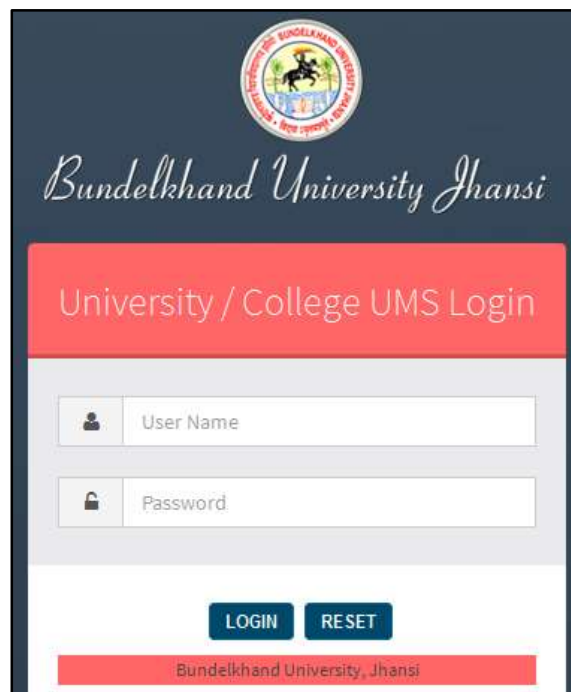- The login screen will be displayed as shown below.

Image: Login form

Fig. 1.0

- Type your User Name and Password and click *Login* button

- The University Management System will open, the interactive screen is given below

University Management System Interactive Screen Views

Image: University Management System Screen View-1

Fig. 1.1

Image: University Management System Screen View-2

Fig. 1.2

Open File Tracking System Dashboard

Image: Home Page after login

Fig. 2.0

- From View-1
  - Move the scrollbar (A) from View-1 Screen, to navigate all icons of University Management System.
  - Click on File Tracking System icon to open File Tracking System Module

- From View-2
  - Click on File Tracking System box (B) to open File Tracking System Module
  - This will open File Tracking System Module as given below

  - On dashboard a summary of file will be displayed like incoming files count and created files count etc.
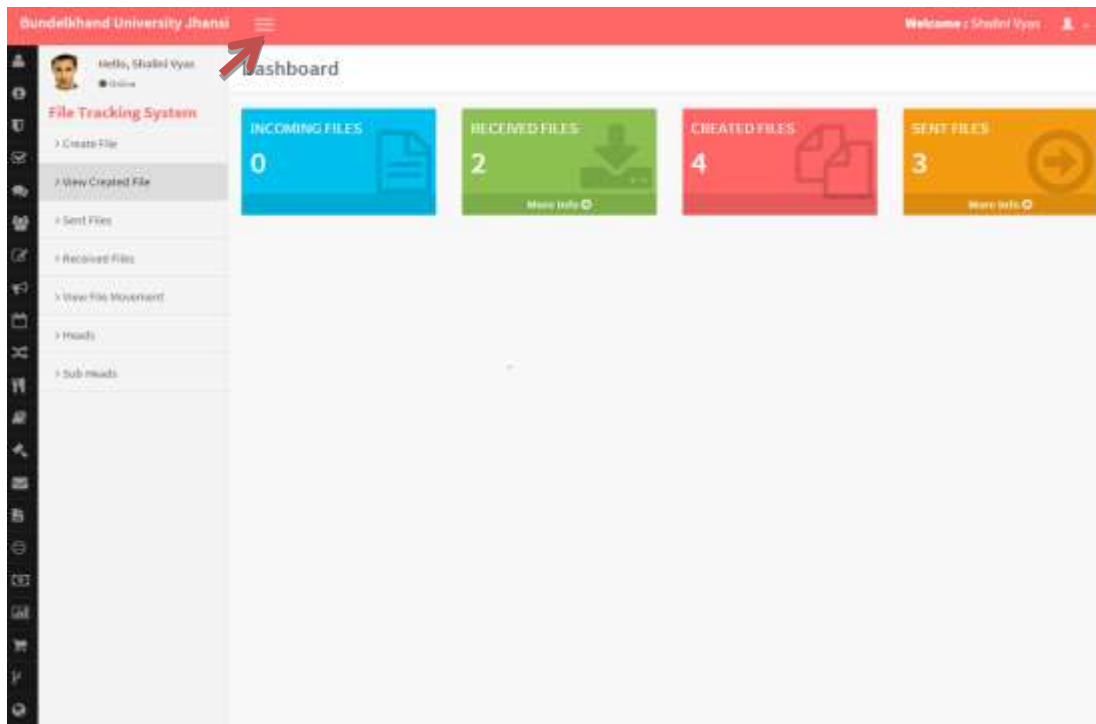
Image: File Tracking System Dashboard Page

Fig. 2.1

"Normally the menu will be shown vertically left side of screen, you may show/hide menu bar by clicking icon red arrowed in above screen"

Menus of File Tracking Module

Menu	Function
Create File	Create a New File
View Created Files	View List of Created Files
Sent Files	View and Action on Sent Files
Received Files	View List of Received Files
View File Movement	Historical Movement of a File
Heads	Create a New Head and View Heads
Sub Heads	Create New Sub Heads and View Sub-Heads

Heads

This is a master category menu, used to view all saved Heads as well as to insert/update/delete Head Types.

- Click on the "Heads" option under the left menu under "File Tracking System".
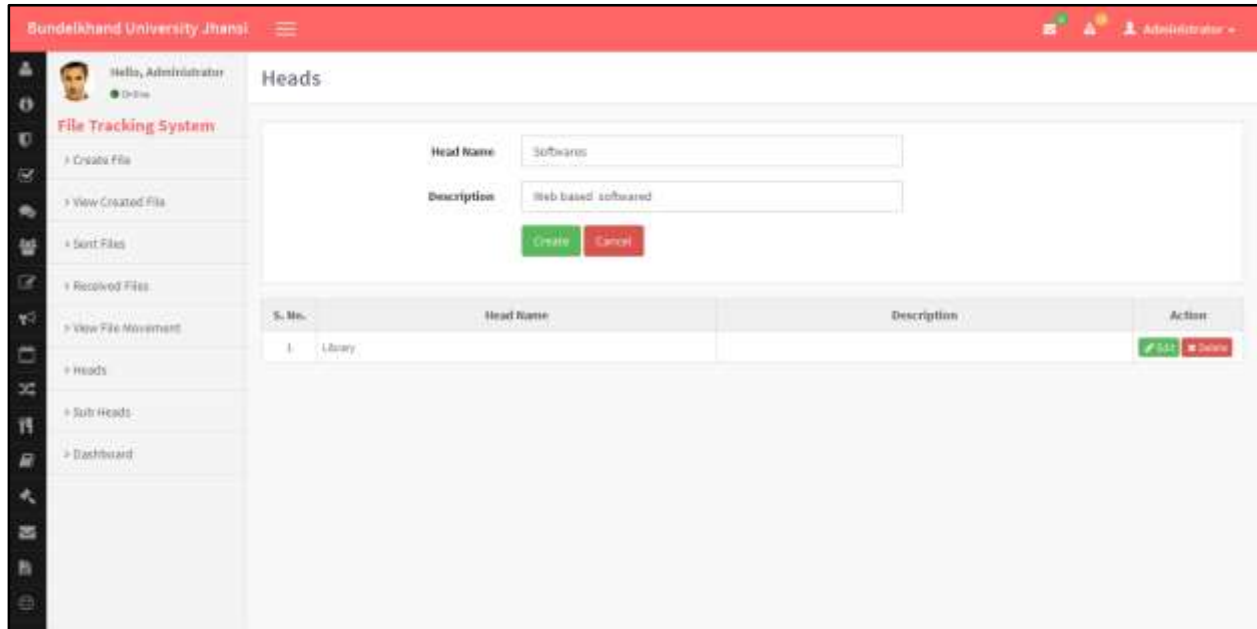- A screen to manage heads will open as shown in figure 3.0

Image: Heads Page

Fig. 3.0

Adding New Head Type

- Fill head name and description and click on "Create" button to add new Head.
- A confirmation message will be prompted "Record Saved Successfully", click OK
- All heads will be listed in below section.
- Existing heads can be updated or removed from edit and delete options provided in that section.

Editing of an Existing Head
- Click on the edit button of the head which needs to be updated.
- Enter new head name and description and click on "Save" button to update head.
- A confirmation message will be prompted "Record Saved Successfully", click OK

Deleting an Existing Head
- Click on the delete button of the head which needs to be removed.
- Head will be removed and a confirmation message will be prompted "Record Deleted successfully".

Sub Heads:

This is a master category menu, used to view all saved Sub-Heads as well as to insert/update/delete Sub-Head Types.

- Click on the "Sub Heads" option under the left menu under "File Tracking System".
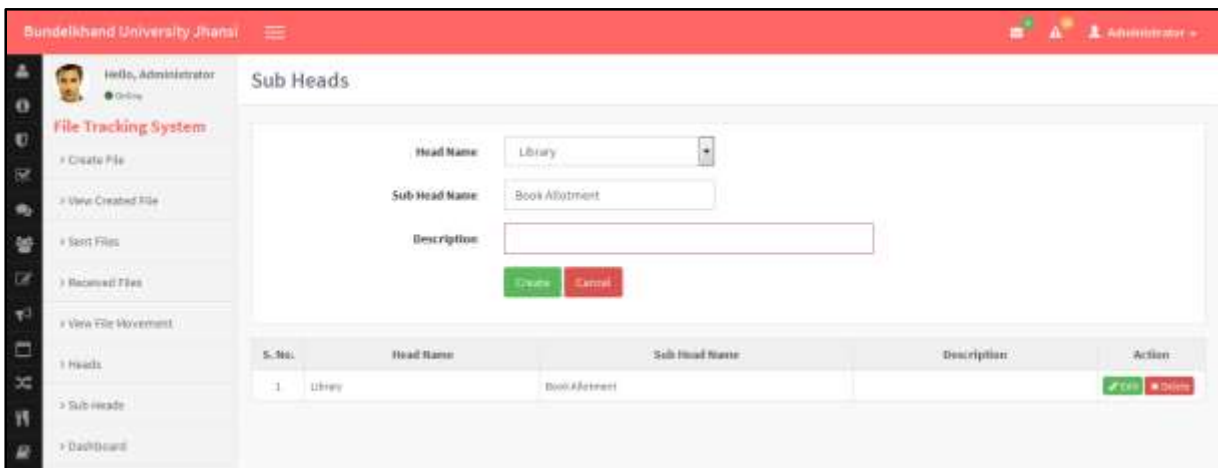- A screen to manage heads will open as shown in figure 4.0

Image: Sub Heads Page

Fig. 4.0

Adding New Sub-Head Type
- Select Head name and fill sub head name, description as shown in Fig 4.0 and click on "Create" button to add new subhead.
- A confirmation message will be prompted "Record Saved Successfully", click OK
- You can also reset all details by clicking on "Cancel" button.
- All sub-heads are listed in below section.
- Existing sub-heads can be updated or removed from edit and delete options provided below section.

Editing of an Existing Sub-Head
- Click on the edit button of the sub-head which needs to be updated.
- Enter new sub-head name and description and click on "Save" button to update head.
- A confirmation message will be prompted "Record Saved Successfully", click OK

Deleting an Existing Head
- Click on the delete button of the sub-head which needs to be removed.

▪ Sub-head will be removed and a confirmation message will be prompted "Record Deleted successfully".

Instructions for Creating File

▪ Click on the "Create File" option under the menu "File Tracking System".
▪ Following screen will open as shown in figure 5.0

Image: New File Page

Fig. 5.0

Field Description of Create File Page:

Field Name	Description
File Type	Select file type from drop-down list to set file type for file
File Category	Select file category from drop-down list to set file category for file
File Sub Category	Select file sub category from drop-down list to set file sub category for file
File Closing Date	Enter closing date if available
Reference Number	Enter a reference used to refer file in future
File Title	Enter title of the file
Head Name	Select head name from the drop down
Sub Head Name	Select sub head name from the drop down
Date of Initiation	Enter initiation date of file

File Summary	Enter summary of the file
File Year	Select year for which file should be referenced

Creating New File:

- This page has been divided in two sections.
- From section one, File Details like type and category should be selected.
- In sender details section- head, sub head and file summary needs to be selected.
- An attachment with file can be uploaded also by clicking on the upload button.
- A dialog box will be open, select the pdf file which you want to upload and click ok.
- Fill all entries given in Fig 5.0 and click on "Create" button to add newFile.

- A confirmation message will be prompted "File Created Successfully", click OK
- In confirmation message there will be a link to print file.
- Click on the "Print File" to print entered details of the file.
- You can also reset all details by clicking on "Clear" button.

Instructions to View Created Files

- Click on the "View Created File" option under the menu "File Tracking System".
- Following screen will open as shown in figure 5.1
- All theexisting created file will be listed in this page.
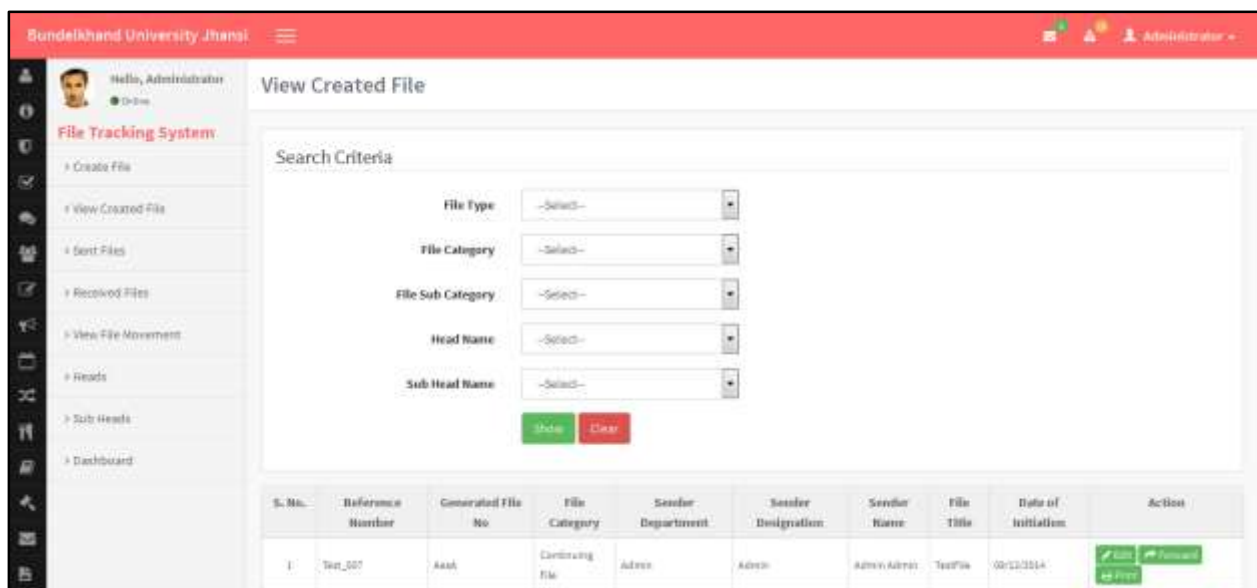
Image: View Created File Page

Fig. 5.1

Search Created Files

- There are multiple filter criteria has been provided
- To filter files based on file type, select file type from "File Type" from down.
- Click on "Show" button to filter files based on selected values.
- Created file of selected file type will be displayed.
- To clear the filter click on clear button. Filter will be removed and data will be displayed.

Print Label of Created Files

- Click on "Print Label" button in the action column in front of the row for which you want to print report of file initial details.
- PDF report of the file initial details will be downloaded.

Edit Created Files

- Click on "Edit" button in the action column for the file listed in created files page
- It will open edit created file page as shown in figure 5.1.1

Image: Edit File Page

Fig. 5.1.1

- All the existing data will be filled in page by default.
- Enter the new data which you need to modify.
- Click on "Update" button to update the created file.
- A confirmation message will be prompted "File has been updated successfully", and new data will be saved.
- You can also reset all details by clicking on "Clear" button if don't need the changes made.

Forward Created Files

- Click on "Forward" buttonin the action column in front of the file which you want to forward to other department.
- Following screen will open as shown in figure 5.1.2

Image:Forward File Page

Fig. 5.1.2

Field Description of Forward File Page:

Field Name	Description
Recipient Department	Select recipient department from the dropdown to which you want to forward the file
Recipient Designation	Select recipient designation from the dropdown to which you want to forward the file
Recipient Name	Select recipient name from the dropdown to which you want to forward the file
Sender Comments	Enter comments as required

- Fill all entries given in Fig 5.1.1 and click on "Send" button to send file to recipient.
- A confirmation message will be prompted "File forwarded successfully", click OK

Instructions to View Sent Files

- Click on the "Sent Files" option under the menu "File Tracking System".
- Following screen will open as shown in figure6.0

Image:View Sent Files Page

Fig. 6.0

NOTE: File which are closed or received will not be allowed to edit. So edit button in Action column for such files will not be displayed.

Search Sent Letters

- There is multiple search criteria has been provided to search a file in sent file list.
- For example, to search files based on file type, select file type from "File Type" from down.
- Click on "Show" button to filter files based on selected values.
- Sent file of selected file type will be displayed.
- To clear the filter click on clear button. Filter will be removed and data will be displayed.

Editing of Sent Files

- Click on "Edit" in Action column in front of the file which you want to edit, following screen will open as shown in figure 6.1
- File details will be displayed in top section.

- There details are to display the details of file and will not be editable.
- Bottom section "Recipient Details" section will have recipient details to which file will be sent.
- Recipient details can be changed.

Image: Edit Sent Files Page

Fig. 6.1

Field Description of Edit Sent File Page:

Field Name	Description
Recipient Department	Select recipient department from the dropdown to which you want to forward the file
Recipient Designation	Select recipient designation from the dropdown to which you want to forward the file

Recipient Name	Select recipient name from the dropdown to which you want to forward the file
Sender Comments	Enter comments as required

- Modify the recipient details and click on "Send" button to change the recipient of file.

View Details of Sent Files

- Click on "View" button in Action column in front of row for which you want to view details.

- A page showing all details of file will be displayed as fig 6.2

- It will have details in two sections as Sender and Receiver Details.
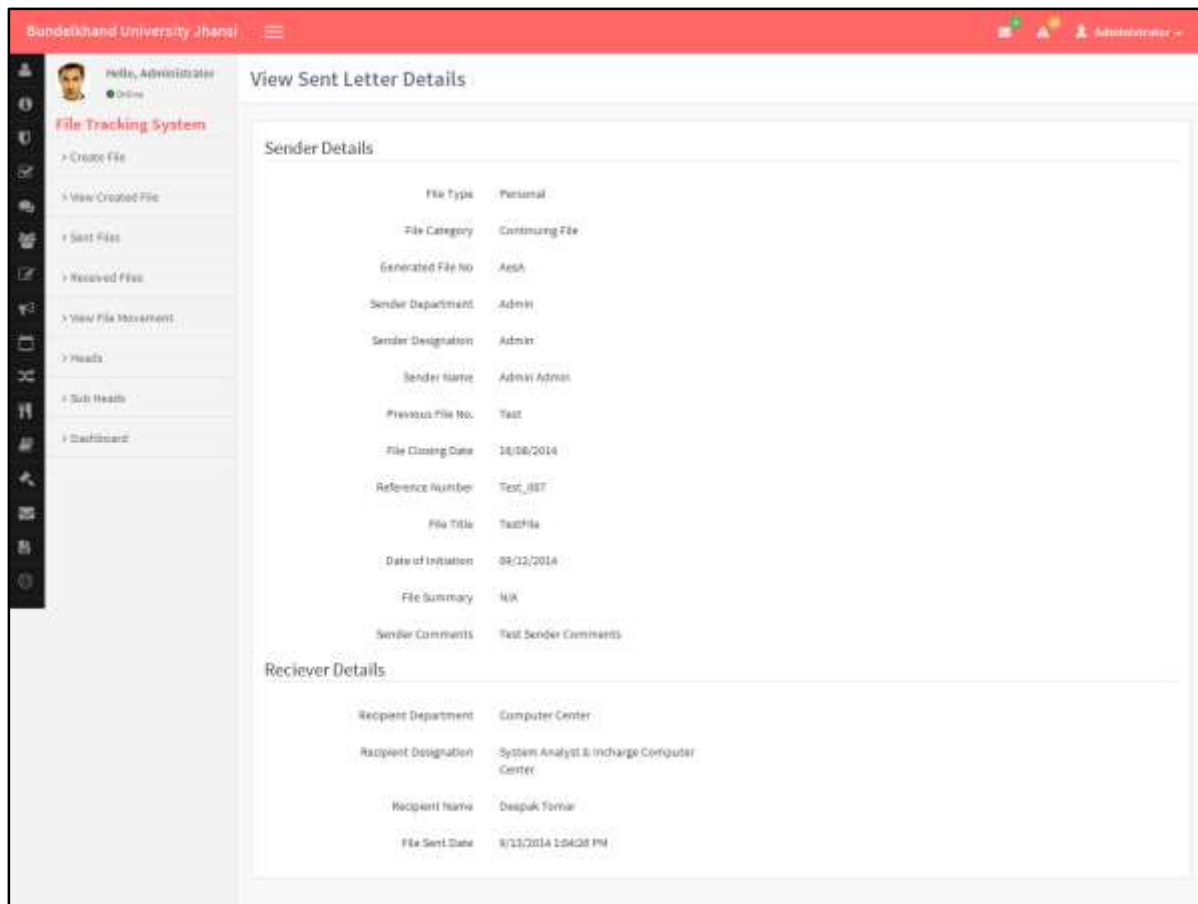
Image:View Sent File Details Page

Fig. 6.2

Instructions to Receive and View Received Files

- ▪ Click on the "Received Files" option under the menu "File Tracking System".
- ▪ Following screen will open as shown in figure 7.0
- ▪ All received filesand which are pending to receive will be listed in this page.

Image: View Received Files Page

Fig. 7.0

Search Received Files

- There is multiple search criteria has been provided to search a file in file list.
- For example, to search files based on file type, select file type from "File Type" from down.
- Click on "Show" button to filter files based on selected values.
- Files of selected "file type" will be displayed.
- To clear the filter click on clear button. Filter will be removed and all files will be displayed.

Receive Files

- Click on the "Receive Letter"button in action column in front of file which you want to receive.
- File will be received and in current status column it will get the status as "Received".
- Once file will get received, it will have three buttons named View, Forward, Close in action column.

Image:Received Files Page

Fig. 7.1

View Details of a Received File

- Click on the "View" button in action column in front of file which you want to view.
- Details of the file will be displayed in page as below screen (fig 7.2).
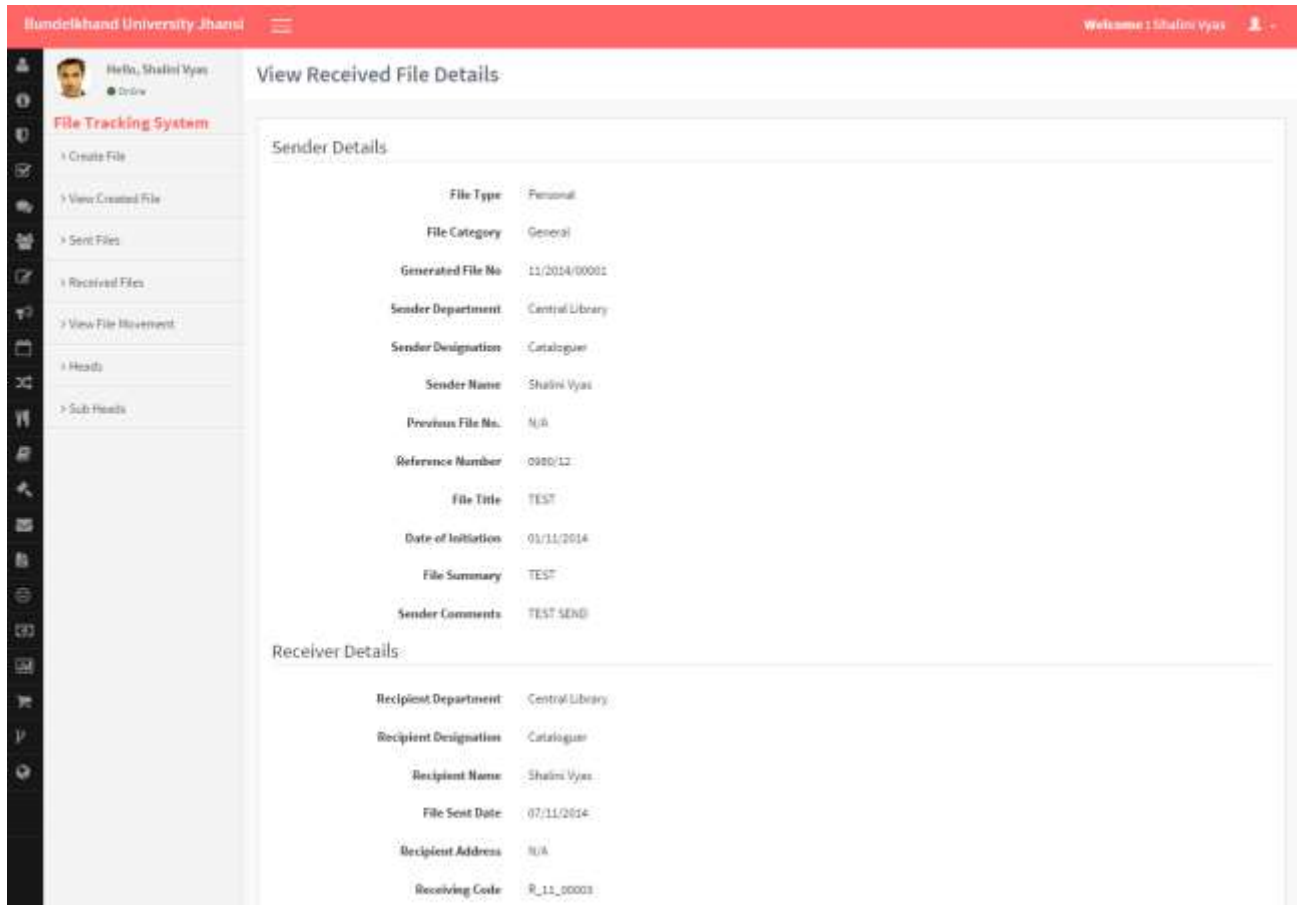- Sender and receiver section will display details for each section.

Image: View Received File Details Page

Fig. 7.2

Forward a Received File

▪ To "Forward" a received file, click on the Forward button in action column as shown in fig 7.1, below screen (fig 7.3) will be displayed.

Image: Forward File Page

Fig 7.3

Field Description of Forward File Page:

Field Name	Description
Recipient Department	Select recipient department from the dropdown to which you want to forward the file
Recipient Designation	Select recipient designation from the dropdown to which you want to forward the file
Recipient Name	Select recipient name from the dropdown to which you want to forward the file
Sender Comments	Enter comments as required

- Fill all entries given in Fig 7.3 and click on "Send" button to forward the File.

Close a Received File

- To close a received file, click on "Close" button in action column in front of file which you want to close.

- Whenyou will click on "Close" button a confirmation box will be displayed,as shown in below screen (fig 7.4).
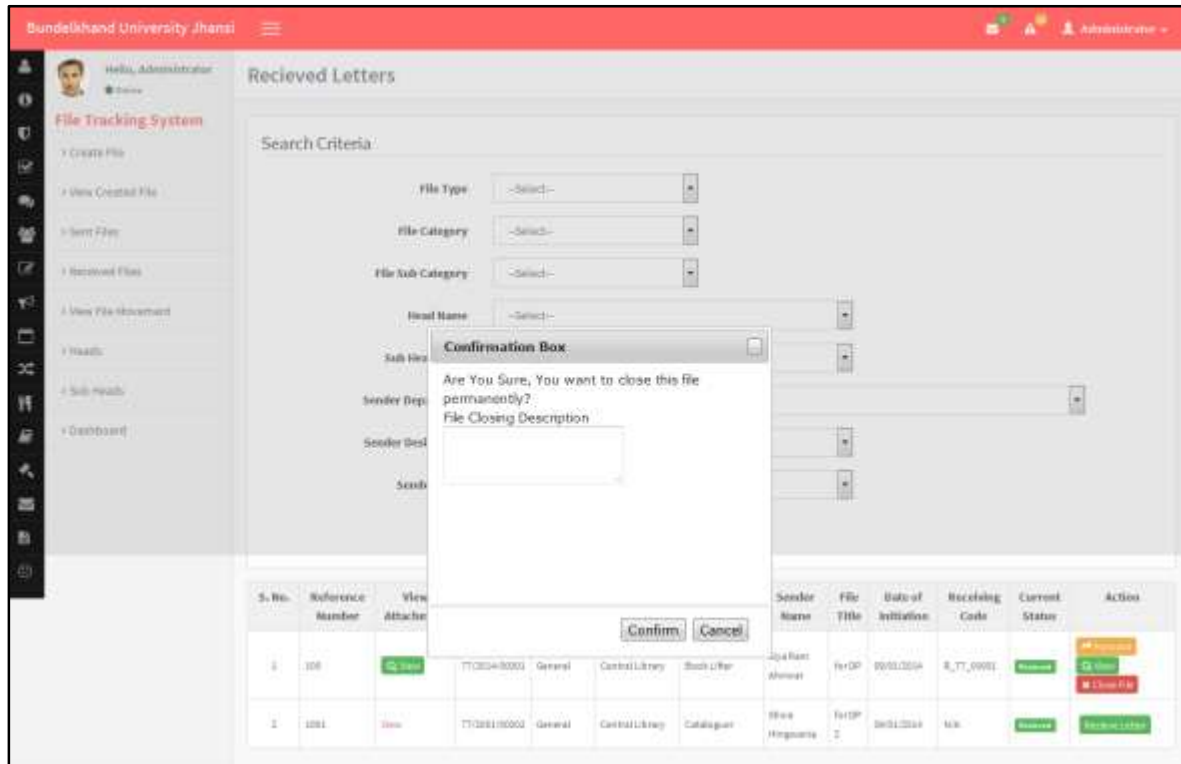

Image: Close Option in Received File Page

Fig 7.4

- Fill the description in the box and click "Confirm" button to close the file.
- File will be closed and in current status column it will have status as "Closed".

Instructions to View File Moments

- Click on the "View File Moment" option under the menu "File Tracking System".
- Following screen will open as shown in figure 7.5
- All received files will be listed in this page.
- This page will display all file moments.
- For a file a details will be there like file originated from which department and sent to which department.
- After if file to forward to another department then there will be another row showing from which department it was forwarded and recipient department details.

Image:View File Moments Page

Fig 7.5

Search Files

- There is multiple search criteria has been provided to search a file in file list.
- For example, to search files sent from a department, select sender department from "Sender department" drop down.
- Click on "Show" button to filter files based on sender department.
- Files of selected "senderdepartment" will be displayed.
- To clear the filter click on clear button. Filter will be removed and all files will be displayed.

View Details of a Received File

- Click on the "View" button in action column in front of file which you want to view.
- Details of the file will be displayed in page as below screen (fig 7.6).
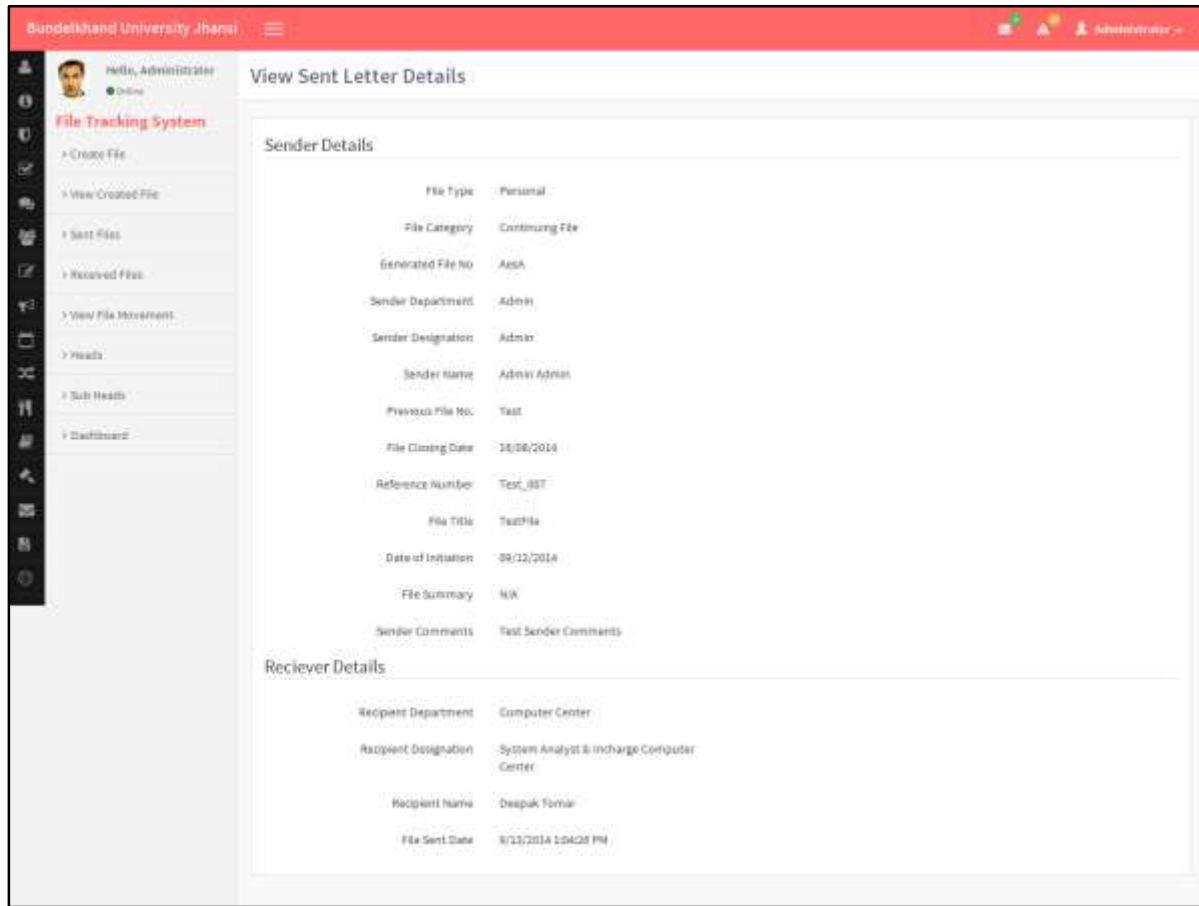- Sender and receiver section will display details for each section.

Image: View File Details Page

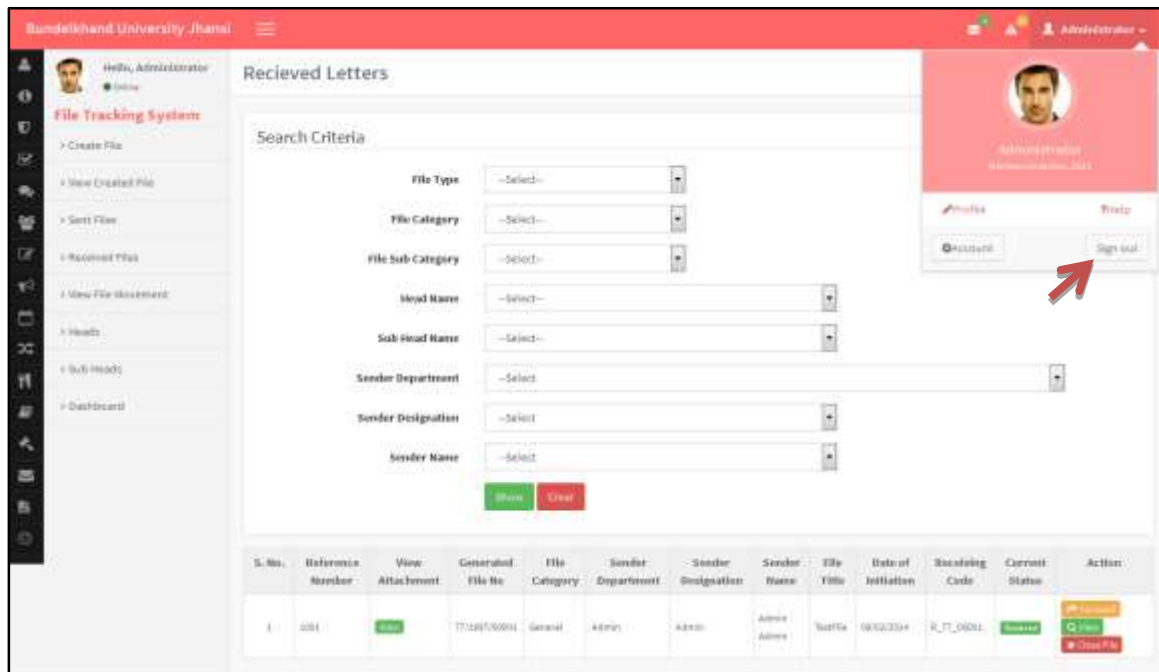**Fig 7.6**

Instructions for Sign Out

Image: Sign out Option

Fig 8.0

- Once you want to close and sign out from file tracking system, click on the top right corner.
- A window will scroll down and sign out button will be there.
- Click on "Sign Out" button in fig 8.0, you will be signed out from system and will redirect to login page.