



Bundelkhand University, Jhansi

## User's Guide File Tracking System

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## Instructions for Using Web Based “File Tracking System”

### Login to File Tracking System

- Type the URL [https://ums.bujhansi.org/bujhansi\\_lms/LMS/Index](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.

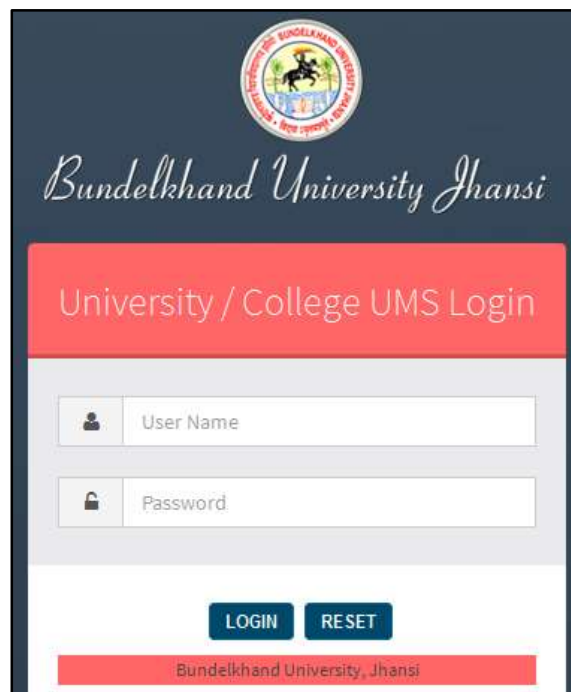
The image shows a web-based login form for Bundelkhand University, Jhansi. At the top, there is a circular logo of the university. Below the logo, the text "Bundelkhand University Jhansi" is written in a cursive font. A red banner below the text reads "University / College UMS Login". The form consists of two input fields: "User Name" and "Password". Below the input fields are two buttons: "LOGIN" and "RESET". At the bottom of the form, there is a red banner with the text "Bundelkhand University, Jhansi".

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.

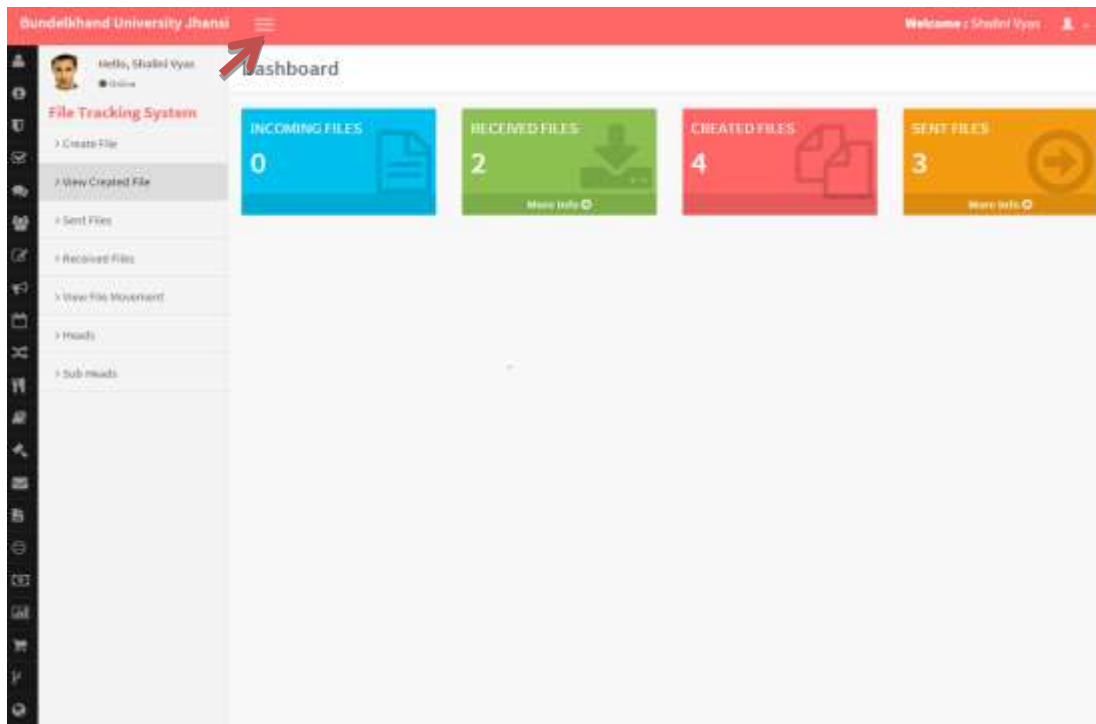


Image: File Tracking System Dashboard Page

**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
<b>Create File</b>	Create a New File
<b>View Created Files</b>	View List of Created Files
<b>Sent Files</b>	View and Action on Sent Files
<b>Received Files</b>	View List of Received Files
<b>View File Movement</b>	Historical Movement of a File
<b>Heads</b>	Create a New Head and View Heads
<b>Sub Heads</b>	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

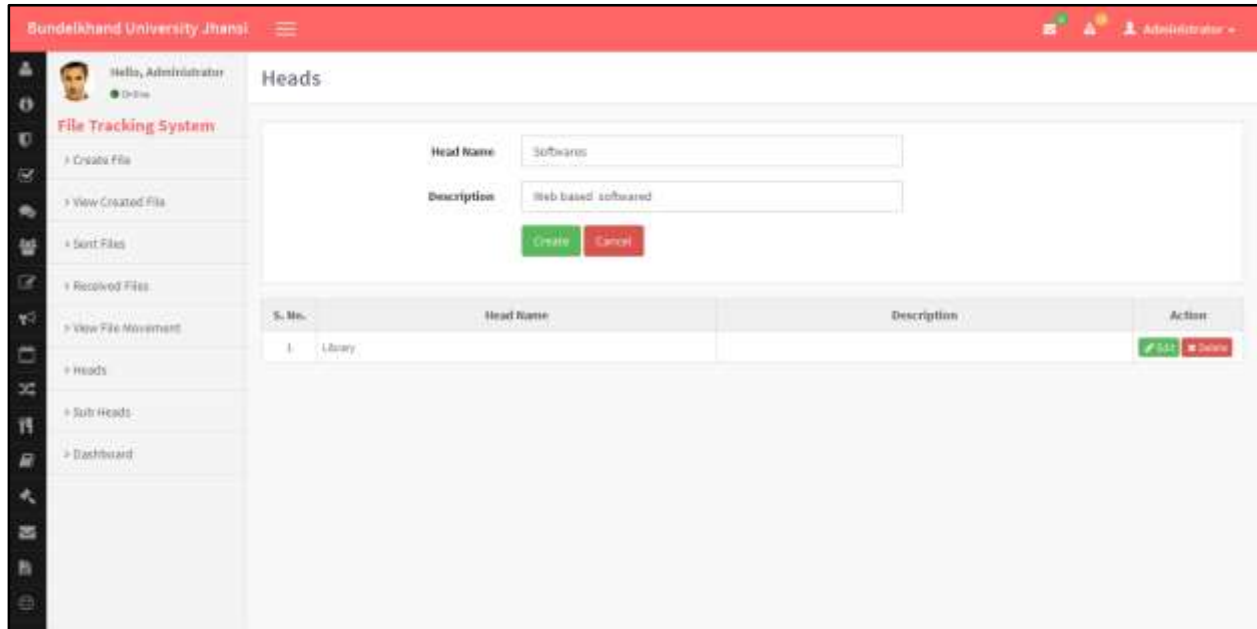


Image: Heads Page

**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

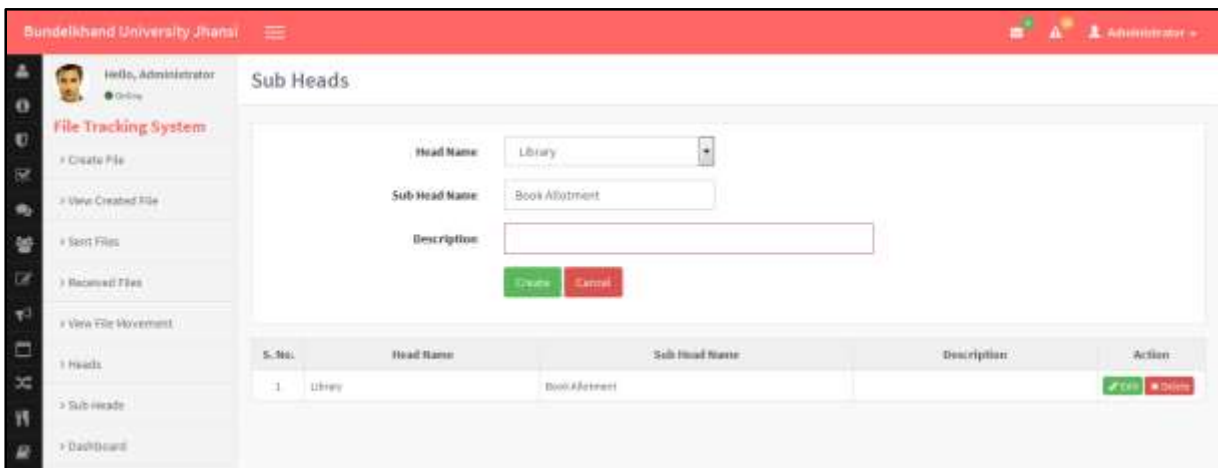


Image: Sub Heads Page

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

<b>File Summary</b>	Enter summary of the file
<b>File Year</b>	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 the existing created file will be listed in this page.

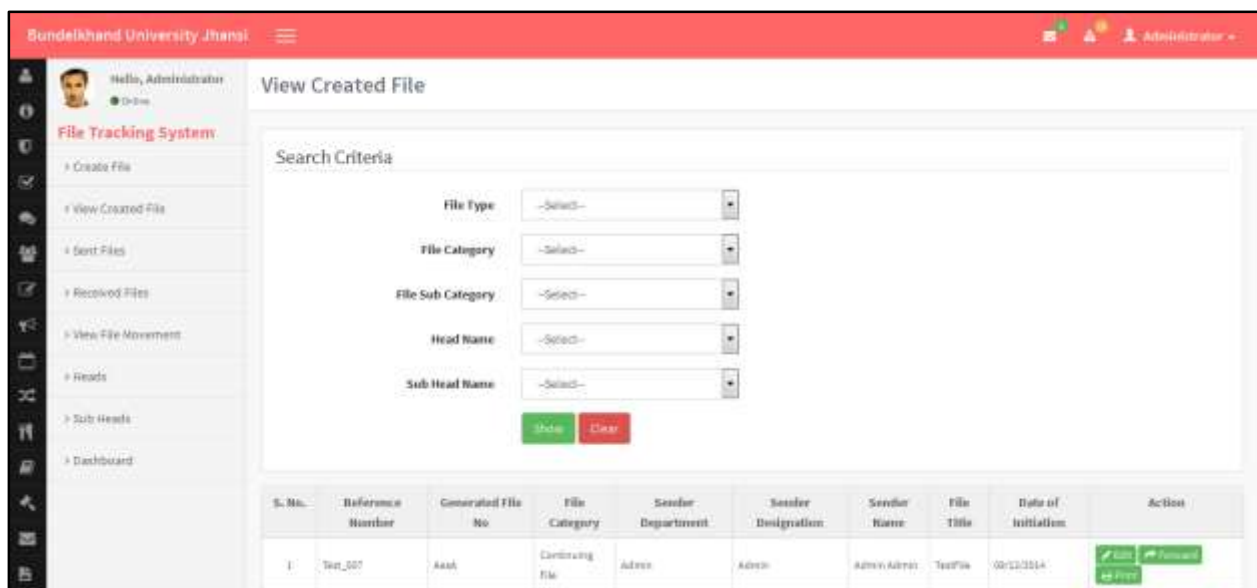


Image: View Created File Page

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

The screenshot shows the 'Edit File Page' interface. The page title is 'Create Files'. It is divided into two main sections: 'File Details' and 'Sender Details'.  
**File Details:**  
- File Type: Personal (dropdown)  
- File Category: Continuing File (dropdown)  
- Previous File No.: Test (text input)  
- File Sub Category: Time Documented (dropdown)  
**Sender Details:**  
- Sender Department: Admin (dropdown)  
- Sender Designation: Admin (dropdown)  
- Sender Name: Admin (text input)  
- Reference Number: Test\_907 (text input)  
- File Title: Test File (text input)  
- Head Name: Library (dropdown)  
- Sub Head Name: Book Return (dropdown)  
- Date of initiation: 12/03/2014 12:00:00 AM (text input)  
- File Summary: Nil (text area)  
- File Year: 2014 (dropdown)  
At the bottom, there is an 'Upload File' section with a green 'Upload File' button, a red 'Clear' button, and a red warning message: 'If you want to upload new file, please upload all files!'.

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” button in 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

The screenshot displays the 'Forward File' page in the File Tracking System. The page is divided into two main sections: 'Sender Details' and 'Recipient Details'. The 'Sender Details' section contains the following information:

File Type	Personal
File Category	Continuing File
Generated File No	AnsA
Sender Department	Admin
Sender Designation	Admin
Sender Name	Admin Admin
Previous File No.	Test
File Closing Date	16/08/2014
Reference Number	Test_057
File Title	TestFile
Date of Initiation	09/12/2014
File Summary	N/A
File Year	2014

The 'Recipient Details' section contains the following information:

Recipient Department	Computer Center
Recipient Designation	System Analyst & Incharge Computer Center
Recipient Name	Deepak Kumar
Sender Comments	Test Sender Comments

A green 'Send' button is located at the bottom of the 'Recipient Details' section.

Image:Forward File Page

Fig. 5.1.2

## Field Description of Forward File Page:

Field Name	Description
<b>Recipient Department</b>	Select recipient department from the dropdown to which you want to forward the file
<b>Recipient Designation</b>	Select recipient designation from the dropdown to which you want to forward the file
<b>Recipient Name</b>	Select recipient name from the dropdown to which you want to forward the file
<b>Sender Comments</b>	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

**View Sent Letter Details**

Search Criteria

File Type:

File Category:

File Sub Category:

Head Name:

Sub Head Name:

Recipient Department:

Recipient Designation:

Recipient Name:

S. No.	Reference Number	Generated File No.	Category	Sender Department	Sender Designation	Sender Name	Recipient Department	Recipient Designation	Recipient Name	File Title	Date of Initiation	Current Status	Action
1	100	TT/2014/00001	General	Admin	Admin	Admin Admin	Central Library	Book Libr-	Sya Ram- A/Issue	for OP	09/01/2014	Completed	<input type="button" value="Edit"/>
2	1001	TT/2000/00002	General	Admin	Admin	Admin Admin	Central Library	Cataloger	Shik Hingwaria	for OP	09/01/2014	Completed	<input type="button" value="Edit"/>
3	Net_007	Asak	Contracting File	Admin	Admin	Admin Admin	Computer Center	System Analyst & Incharge Computer Center	Deepak Suman	TestFile	08/12/2014	Not Completed	<input type="button" value="Edit"/>

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.

The screenshot displays the 'Edit Sent Files Page' interface. On the left is a navigation sidebar with options like 'Create File', 'View Created File', 'Sent Files', 'Received Files', 'View File Movement', 'Heads', 'Sub Heads', and 'Dashboard'. The main content area is titled 'Sender Details' and contains a 'Letter Details' section with the following fields:

- File Type: Personal
- File Category: Continuing File
- Generated File No: AnsA
- Sender Department: Admin
- Sender Designation: Admin
- Sender Name: Admin Admin
- Previous File No: Test
- File Closing Date: 16/06/2014
- Reference Number: Test\_007
- File Title: TestFile
- Date of Initiation: 09/12/2014
- File Summary: N/A
- File Year: 2014

Below this is the 'Recipient Details' section, which includes:

- Recipient Department: Admin (dropdown)
- Recipient Designation: Admin (dropdown)
- Recipient Name: Admin Admin (dropdown)
- Sender Comments: Text Sender Comments (text area)
- A green 'Send' button.

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

<b>Recipient Name</b>	Select recipient name from the dropdown to which you want to forward the file
<b>Sender Comments</b>	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.

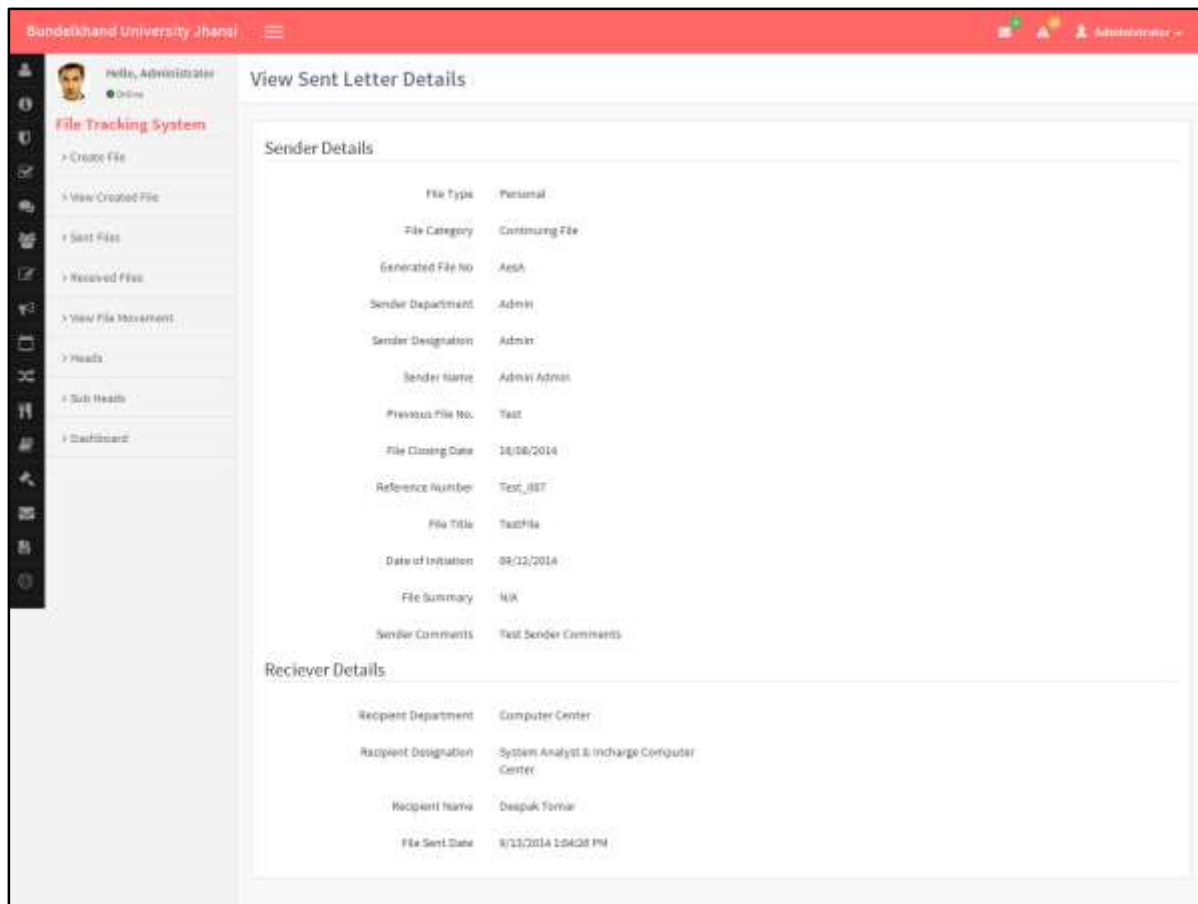


Image:View Sent File Details Page

**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 files and which are pending to receive will be listed in this page.

The screenshot displays the 'Received Files' interface. At the top, there's a navigation bar with 'Bundelkhand University Jhansi' and a user profile 'Hello, Shalini Vyas'. A sidebar on the left contains a menu with options like 'Create File', 'View Created File', 'Sent Files', 'Received Files', 'View File Movement', 'Heads', and 'Sub Heads'. The main content area is titled 'Received Files' and features a 'Search Criteria' section with several dropdown menus: File Type, File Category, File Sub Category, Head Name, Sub Head Name, Sender Department, Sender Designation, and Sender Name. Below these are 'Show' and 'Clear' buttons. A table below the search form lists received files with the following data:

S. No.	Reference Number	View Attachment	Generated File No.	File Category	Sender Department	Sender Designation	Sender Name	File Title	Date of Initiation	Receiving Code	Current Status	Action
1	000072		11/2014/00002	General	Central Library	Cataloguer	Shalini Vyas	TEST	01/11/2014	R_11_00001	Received	
2	000034/paper		1/2014/00004	General	Academic Section	Junior Assistant	Jeebh Prasad Sahran	TEST	04/11/2014	R_11_00001	Received	

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.

The screenshot displays the 'Received Files' interface. At the top, there's a navigation bar with 'Bundelkhand University Jhansi' and a user profile for 'Shalini Vyas'. A sidebar on the left contains navigation options like 'Create File', 'View Created File', 'Sent Files', 'Received Files', 'View File Movement', 'Heads', and 'Sub Heads'. The main content area features a 'Search Criteria' form with dropdown menus for 'File Type', 'File Category', 'File Sub Category', 'Head Name', 'Sub Head Name', 'Sender Department', 'Sender Designation', and 'Sender Name'. Below the form are 'Show' and 'Clear' buttons. A table below the form lists received files with the following data:

S. No.	Reference Number	View Attachment	Generated File No.	File Category	Sender Department	Sender Designation	Sender Name	File Title	Date of Initiation	Receiving Code	Current Status	Action
1	000012		11/2014/00001	General	Central Library	Cataloguer	Shalini Vyas	TEST	01/11/2014	R_11_00001	Received	Forward, View, Close File
2	000013/para		1/2014/00004	General	Academic Section	Junior Assistant	Jyoti Prasad Suman	TEST	04/11/2014	R_11_00004	Received	Forward, View

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.

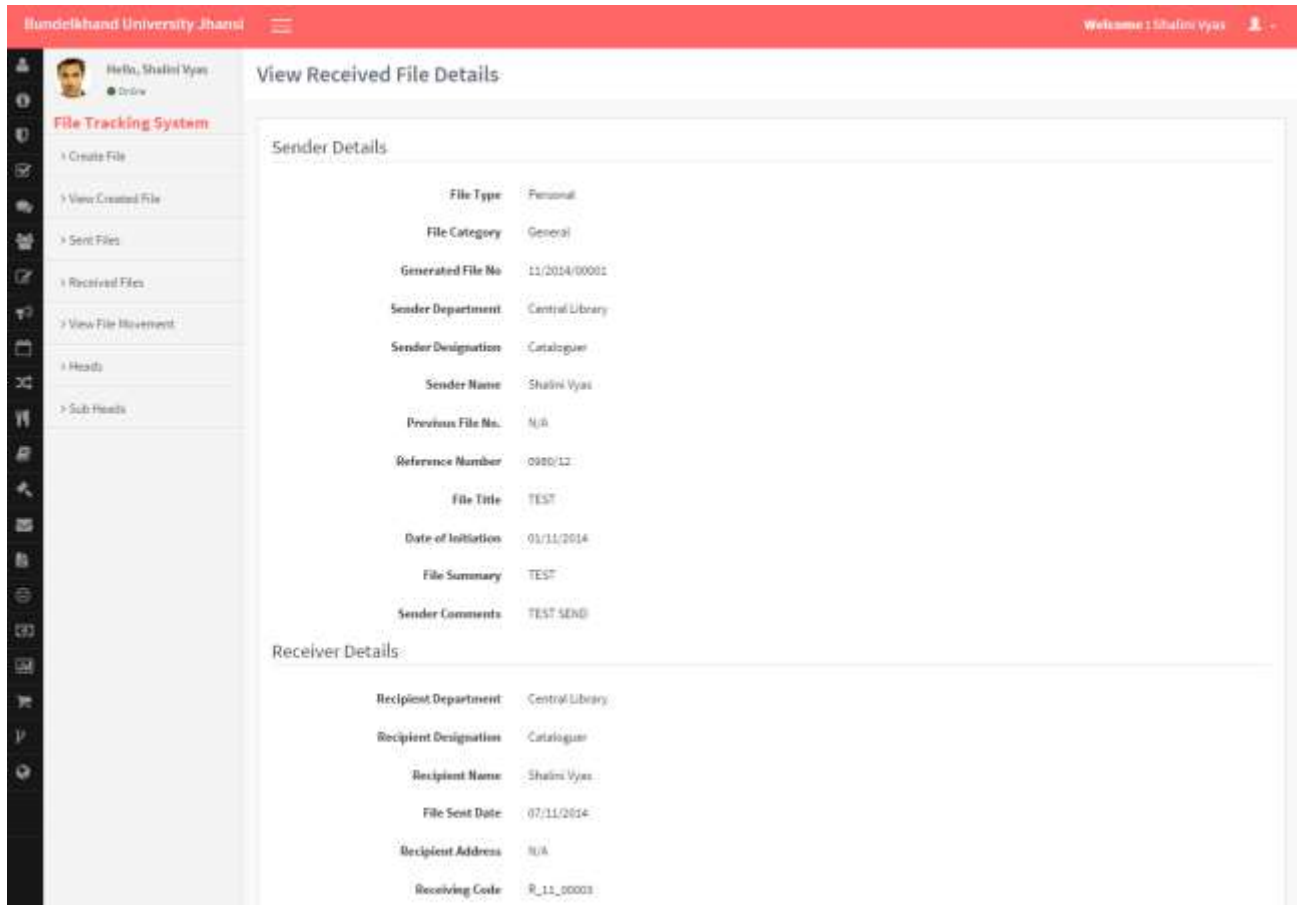


Image: View Received File Details Page

**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.

The screenshot displays the 'Forward File Page' in the File Tracking System. It is divided into two main sections: 'File Details' and 'Recipient Details'. The 'File Details' section lists various attributes of the file being forwarded, such as its type, category, number, sender information, and date. The 'Recipient Details' section provides a form to specify the recipient, including department, designation, name, and a space for comments, followed by a 'Send' button.

Image: Forward File Page

Fig 7.3

### Field Description of Forward File Page:

Field Name	Description
<b>Recipient Department</b>	Select recipient department from the dropdown to which you want to forward the file
<b>Recipient Designation</b>	Select recipient designation from the dropdown to which you want to forward the file
<b>Recipient Name</b>	Select recipient name from the dropdown to which you want to forward the file
<b>Sender Comments</b>	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.

- When you will click on “Close” button a confirmation box will be displayed, as shown in below screen (fig 7.4).

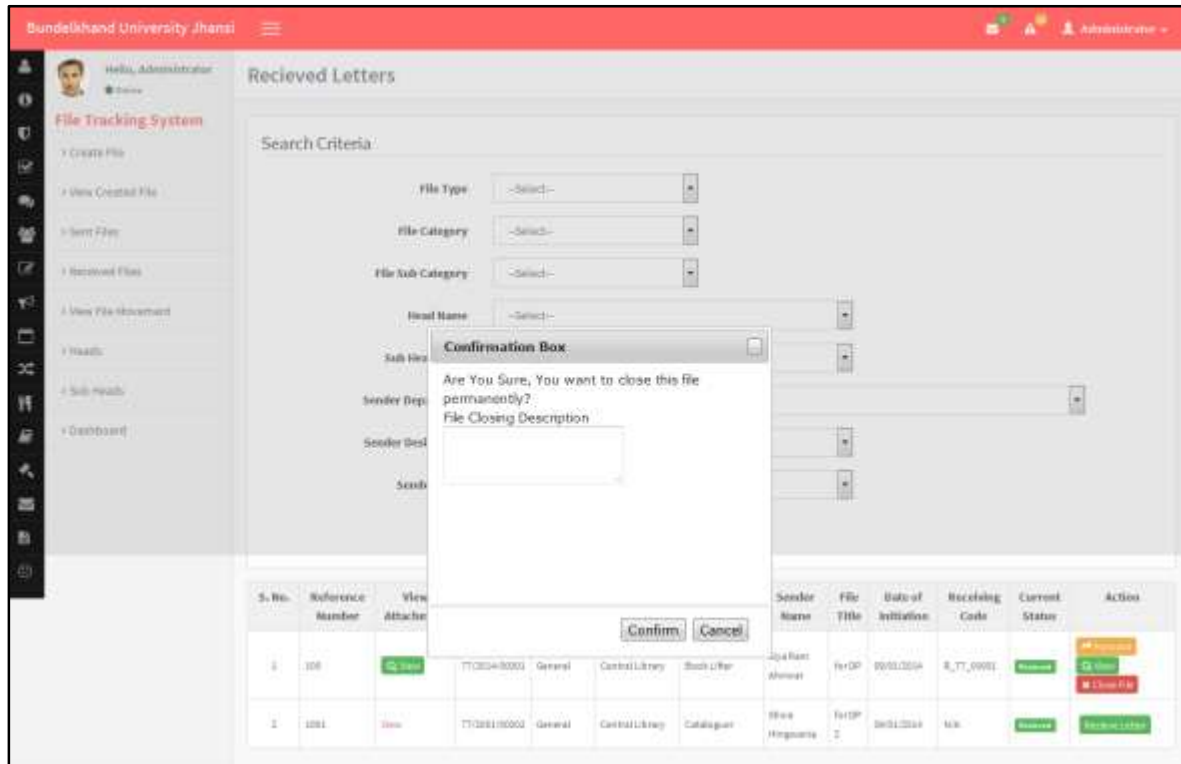


Image: Close Option in Received File Page

**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.

S. No.	File Title	Generated File No	File Sent Date	File Summary	Sender Department	Sender Designation	Sender Name	Recipient Department	Recipient Designation	Recipient Name	File Receiving Date	Receiving Code	Status	Action
1	TEST	12/2014/00001	08/11/2014	TEST	Central Library	Cataloguer	Shalini Vyas	Central Library	Book Lifter	Sya Ram Ahnwar	08/11/2014 00:00:00	R_11_00001	Received	<a href="#">View</a>
2	TEST	1/2014/00004	07/11/2014	TEST Summary	Academic Section	Junior Assistant	Joshi Prasad Suman	Central Library	Book Lifter	Sya Ram Ahnwar	07/11/2014 00:00:00	R_11_00002	Received	<a href="#">View</a>
3	TEST	1/2014/00004	07/11/2014	TEST Summary	Academic Section	Junior Assistant	Joshi Prasad Suman	Central Library	Cataloguer	Shalini Vyas	07/11/2014 00:00:00	R_11_00001	Received	<a href="#">View</a>

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.

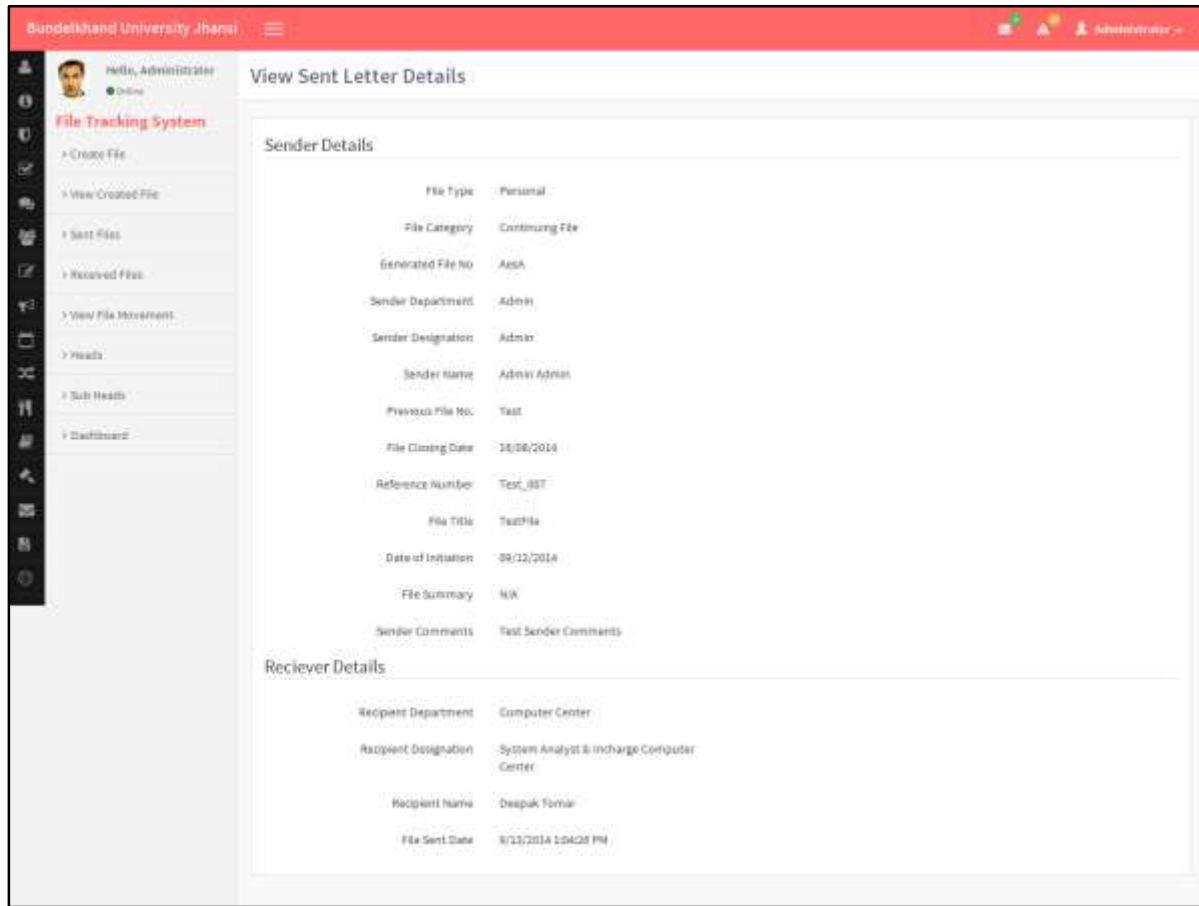


Image: View File Details Page

**Fig 7.6**

## Instructions for Sign Out

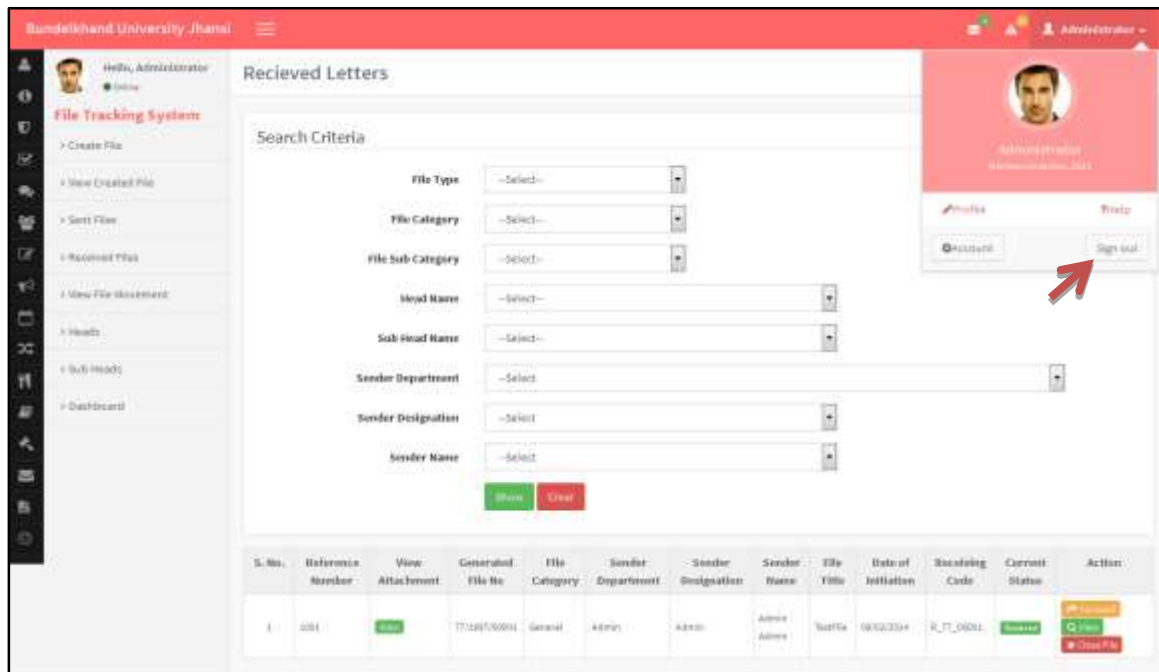


Image: Sign out Option

**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.