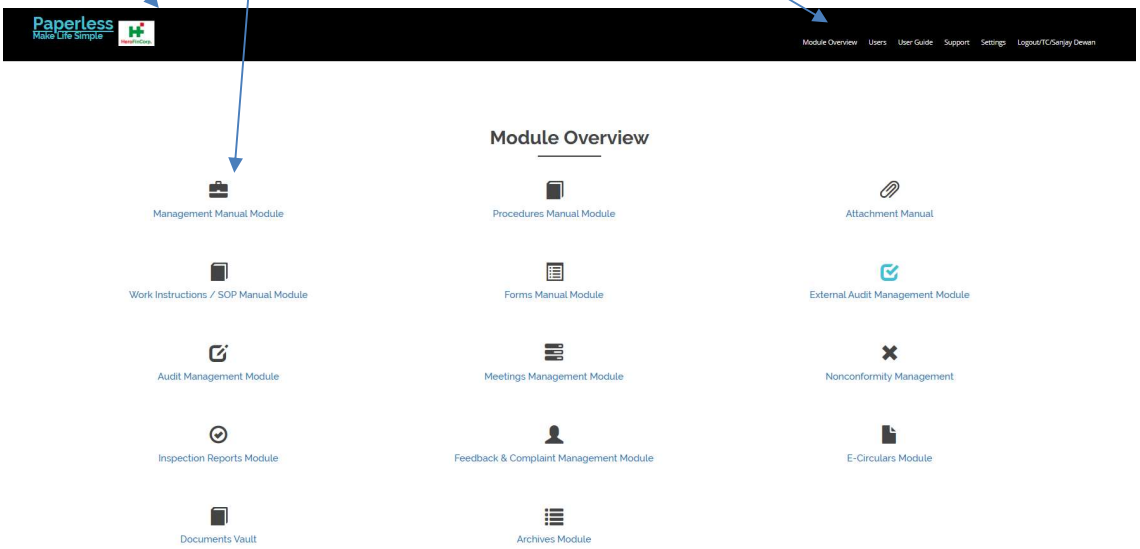
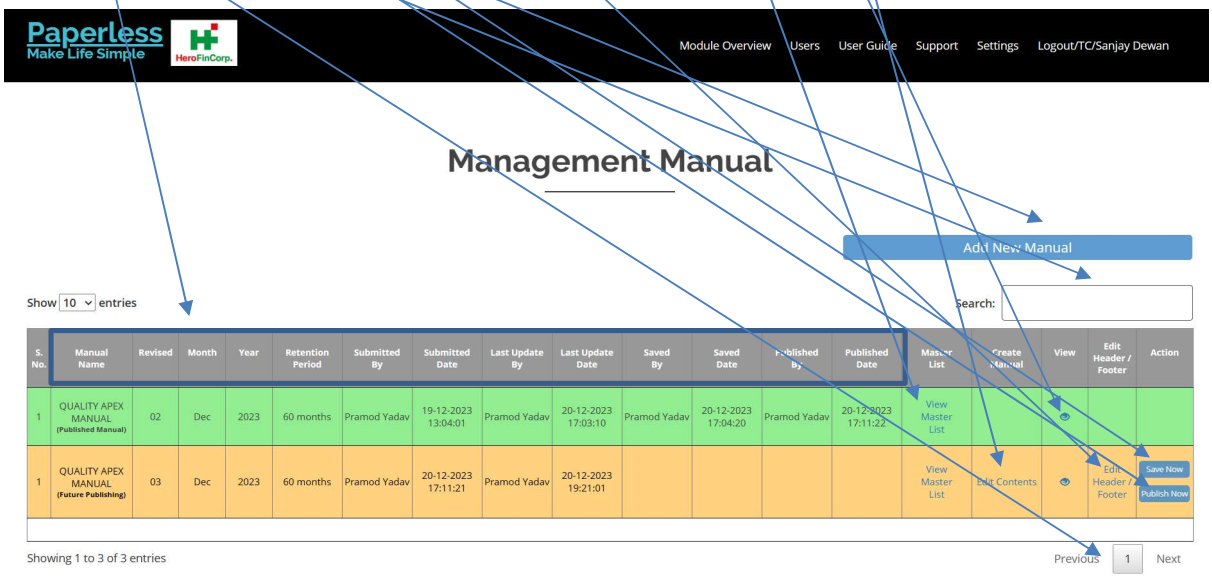
Management Manual

1. You can create and distribute all manuals from management manual.
2. Click on the ‘Module Overview’ at the navigation bar.
3. Following page will open.
4. Click on ‘Management Manual Module’.



Management Manual Dashboard

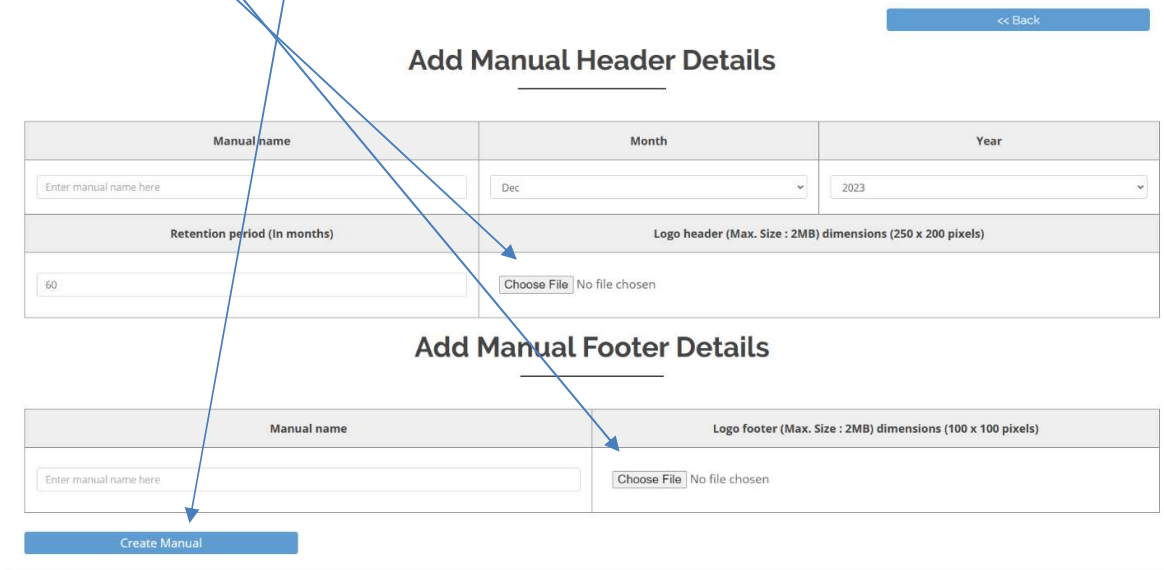
1. View Master List by clicking ‘Master List’.
2. You can edit the manual by clicking on ‘Edit Contents’.
3. You can view the manual by clicking on the.
4. You can edit the header and footer of the manual by clicking on ‘Edit Header/Footer’.
5. You can save your manual by clicking on ‘Save Now’.
6. You can publish your manual by clicking on ‘Publish Now’.
7. You can add new manual by clicking on ‘Add New Manual’.
8. You can search here any type of field.
9. If you have many manual name entries so you can use pagination.



1. The colour meaning in the management manual dashboard.
2. Green colour means published manual completed.
3. Orange colour means future published in process.

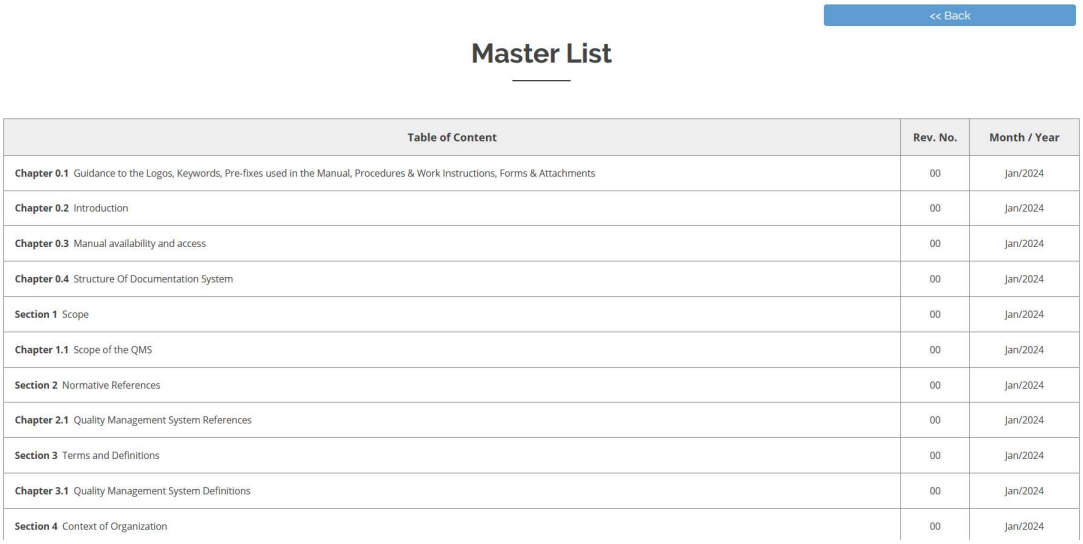
Adding Header and Footer

1. You can edit the header and footer of the manual by clicking ‘Edit Header / Footer’ on the dashboard.
2. Fill up the header and footer details.
3. Upload your company logo on the header.
4. Upload any logo of your choice in the footer
5. Please re-check your form before create manual header and footer.
6. Click on ‘Create Manual’ to submit your details.



Viewing the Master List of all Sections and Chapters

1. Click on ‘View Master List’ at the dashboard.
2. The master list page will show up.

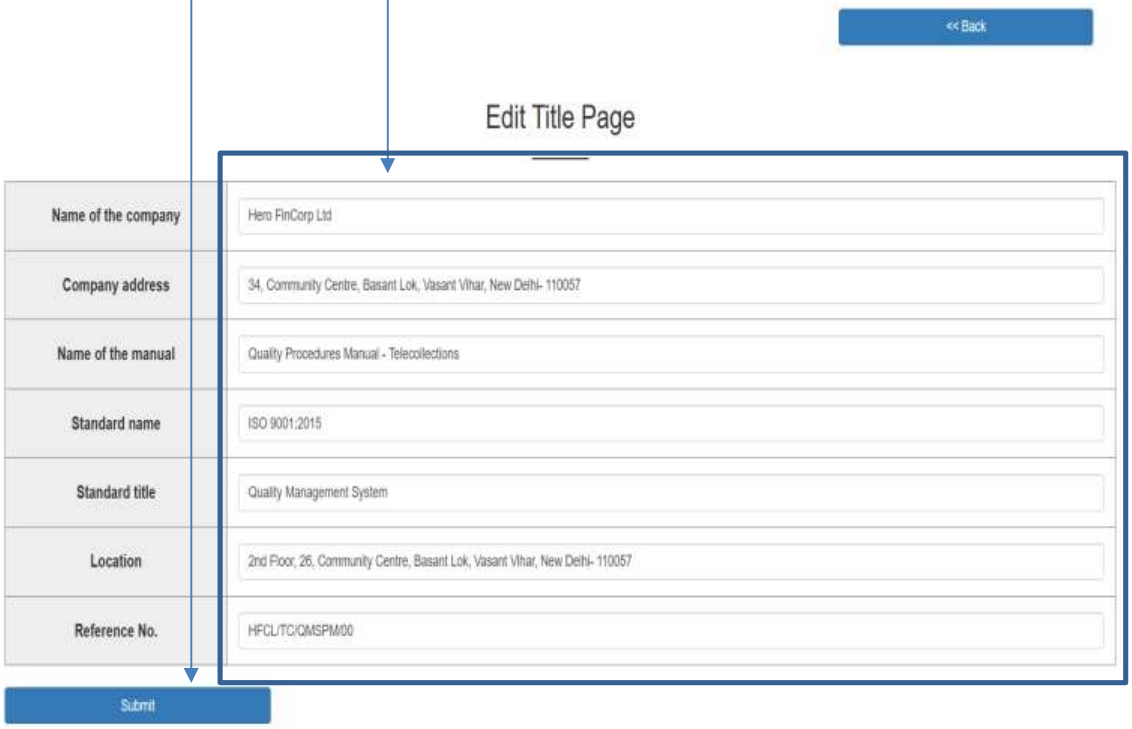


Editing the Title Page

1. Click on ‘Edit Contents’ at the dashboard.
2. The title page will open up.
3. We see the ‘Edit Title Page’ button click here for edit title page.
4. Start creating / editing the title page by clicking on ‘Edit Title Page’.

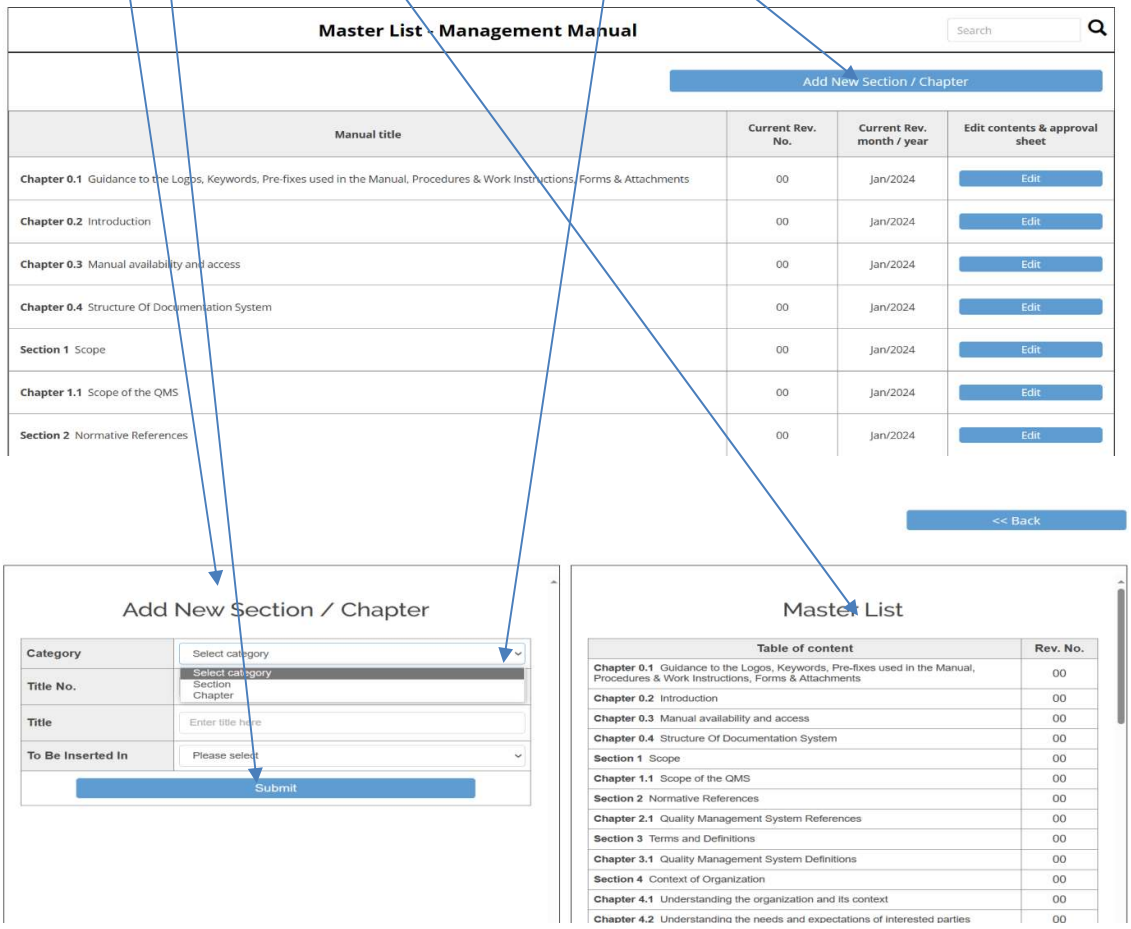
Editing Title Page

1. Fill up the relevant details.
2. Submit your details.
3. The title page will be updated to your requirements.



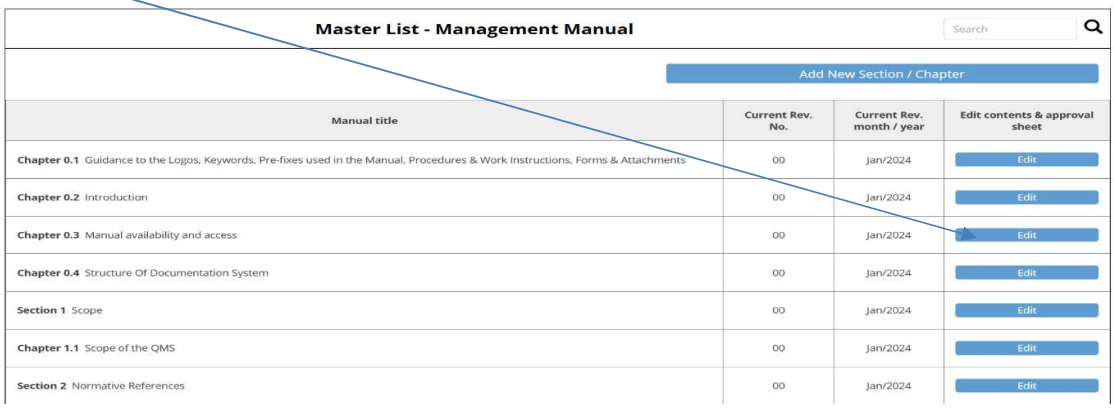
Adding New Section / Chapter

1. Click on ‘Edit Contents’ at the dashboard.
2. Scroll down till you see the ‘Master List- Management Manual’ page.
3. You can add a new section or chapter by clicking on ‘Add New Section / Chapter’ at the right-hand top corner in the first image.
4. A fresh page will open up showing the blank ‘Add New Section / Chapter on the left panel and ‘Master List’ on the right panel.
5. Select ‘Section or Chapter’ from the drop-down menu, as required.
6. Write the title no.
7. Write the title.
8. Choose the section in which you want to insert or add the new chapter from the drop-down menu of ‘To be inserted in’.
9. Submit your details.
10. The new chapter will be added and show up under the chosen section at the right side panel.
11. Search here if you want search any section or chapter.

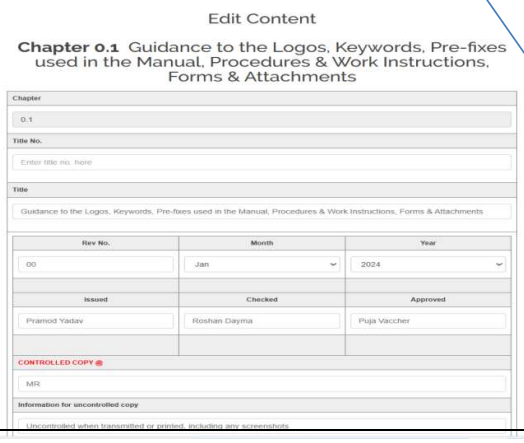


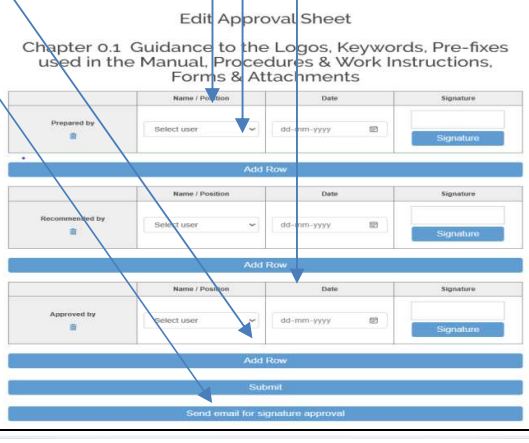
Editing the Contents of Management Manual

1. Click on ‘Edit Contents’ at the Master list dashboard
2. The cover page will open up
3. Keep scrolling down till you see the ‘Master List- Management Manual’ page
4. You can edit any section or chapter by clicking on ‘Edit’



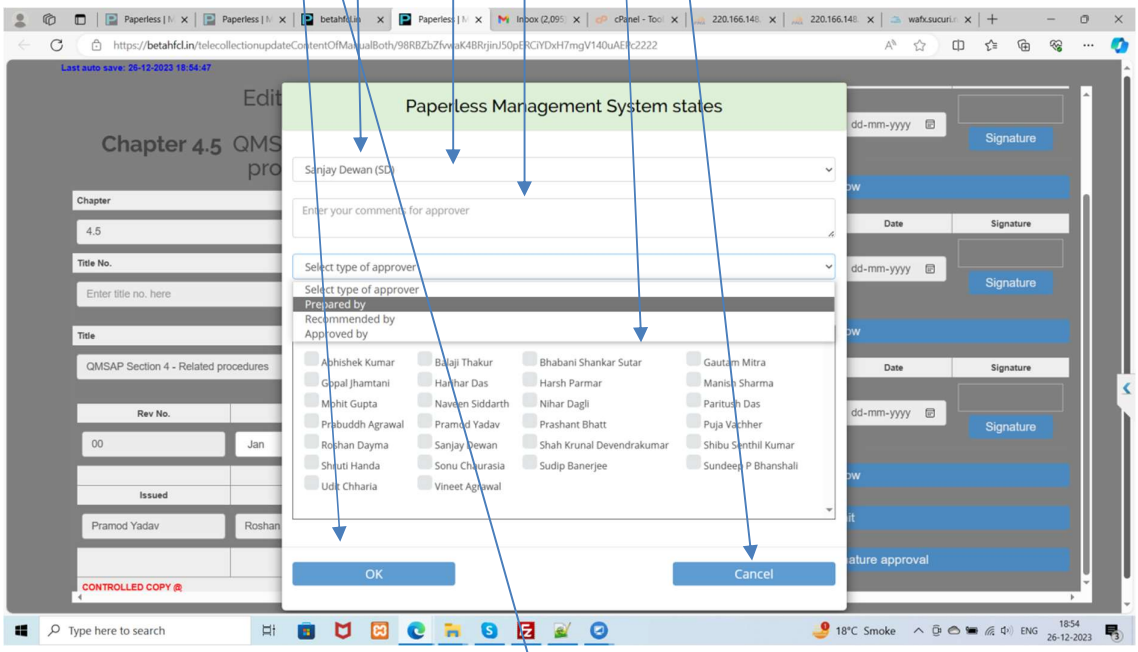
5. A page will open up showing two panels
   I. The ‘Edit Content’ panel will be on the left showing the chosen section or chapter which you want to edit
   II. The ‘Edit Approval Sheet’ will be on the right panel where you can get your approvals signature.
6. You can edit / update the content at the left panel by editing / updating the various data / information
7. While updating the content remember to highlight the new content in *Italics*
8. Use the features of the editor to make your content attractive.
9. You can also copy and paste directly from any ‘word’ or ‘excel’ document.
10. You can add additional approvals (prepared by, recommended by and approved by).
11. Submit your details upon completion
12. Click on ‘Send email for signature approval’ to get approval by email.
13. An alert box will show up. Click ‘OK’ to save the edited contents
14. Another alert box will show up reminding you if you have followed the protocol of highlighting the newly added content in Italics. If this has been done then click ‘OK’. And the contents will be saved
15. If not done then you should ‘Cancel’ and go back to follow the protocol and repeat the process.

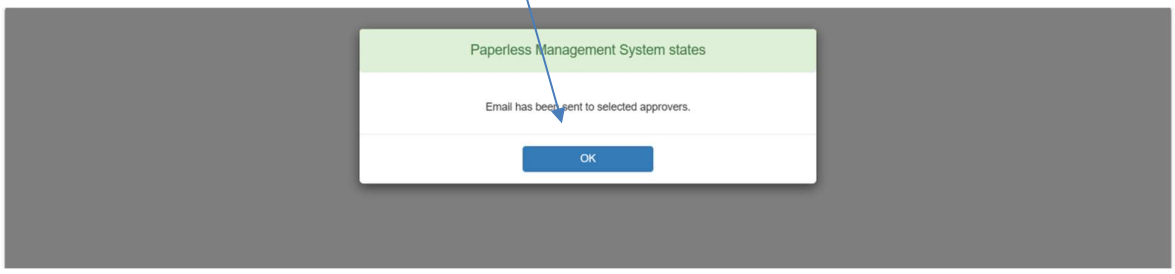




Sending E-mail for Signature Approval

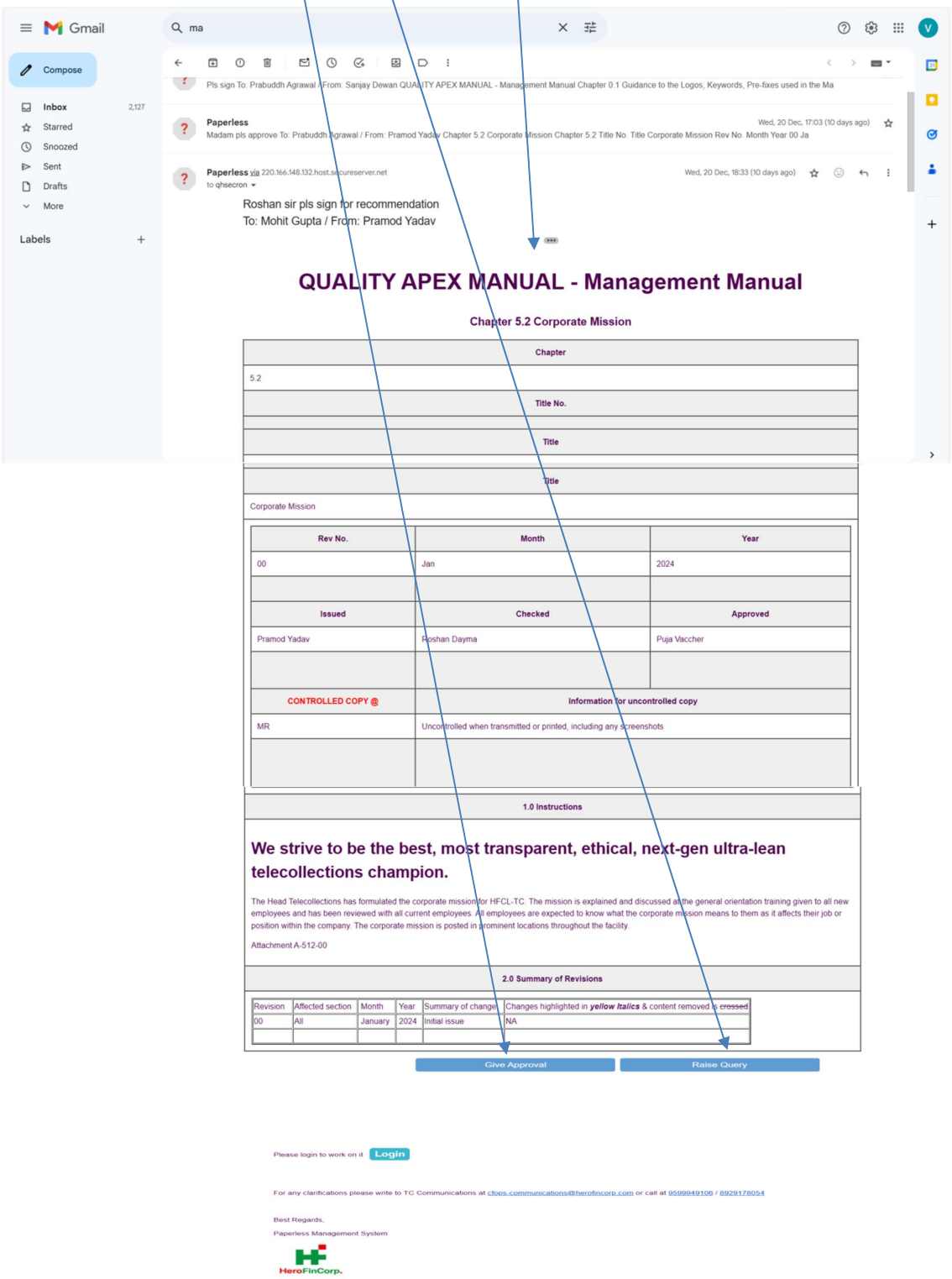
1. You can send an email for approval to any of the approvers who can approve and sign on email itself without logging in to the application.
2. Select sender name from the drop-down menu.
3. Write your comment for approver here.
4. Select type of approver from the drop-down menu as required.
5. Select / checkbox the management manual approvers here.
6. Click on ‘OK’ for sending the mail to selected approvers.
7. An alert box will show up then click ‘OK’.
8. By clicking on ‘Cancel’ you can cancel the approval.





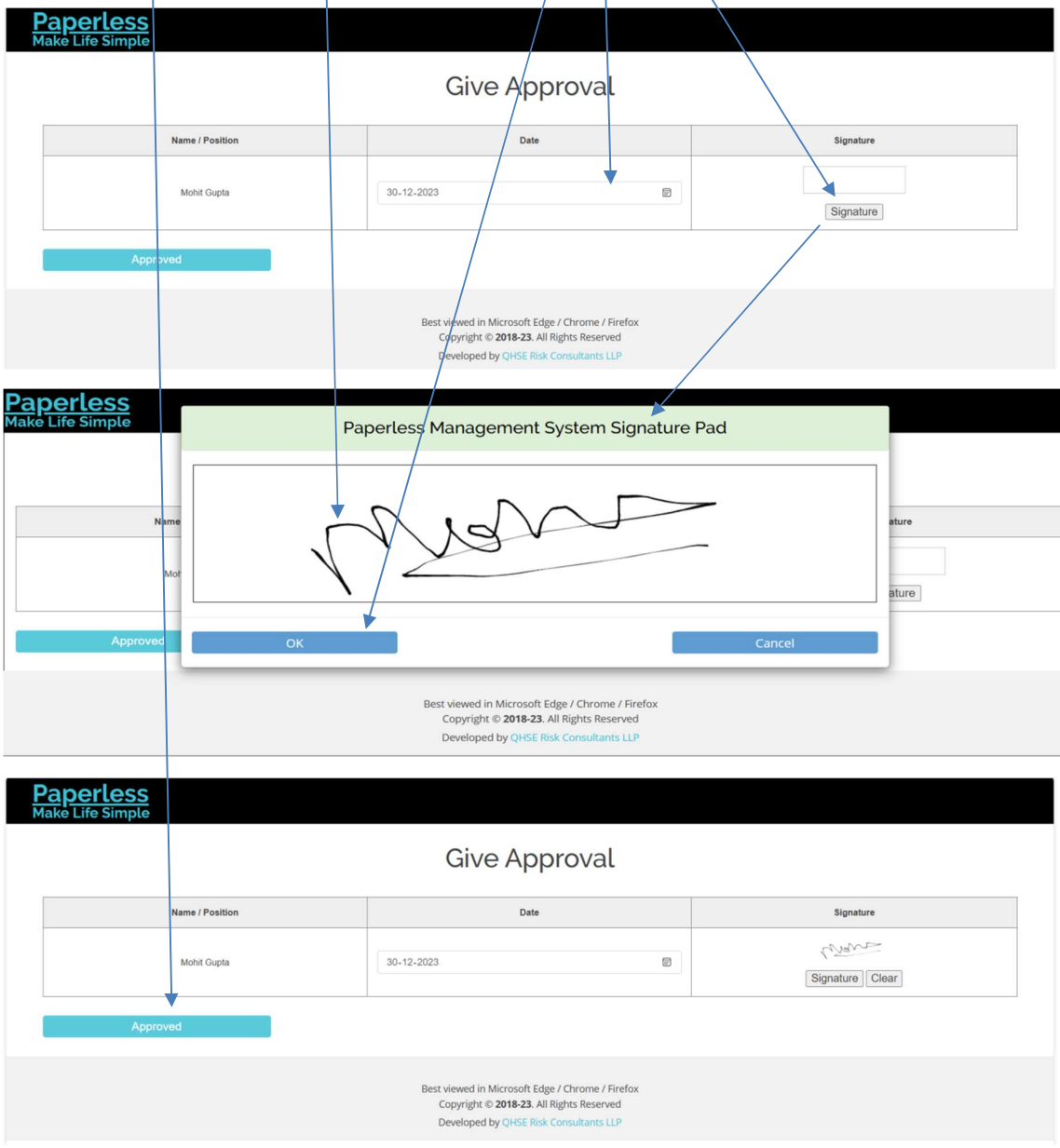
Request Approval for Signature E-mail

1. The approver will receive a new mail for approving the document online without logging in to the application.
2. Click on ‘Give Approval’ for approving the document.
3. If you want some changes or updates in the management manual so you can clicking on ‘Raise Query’.



Online Approval of Manual thru Email

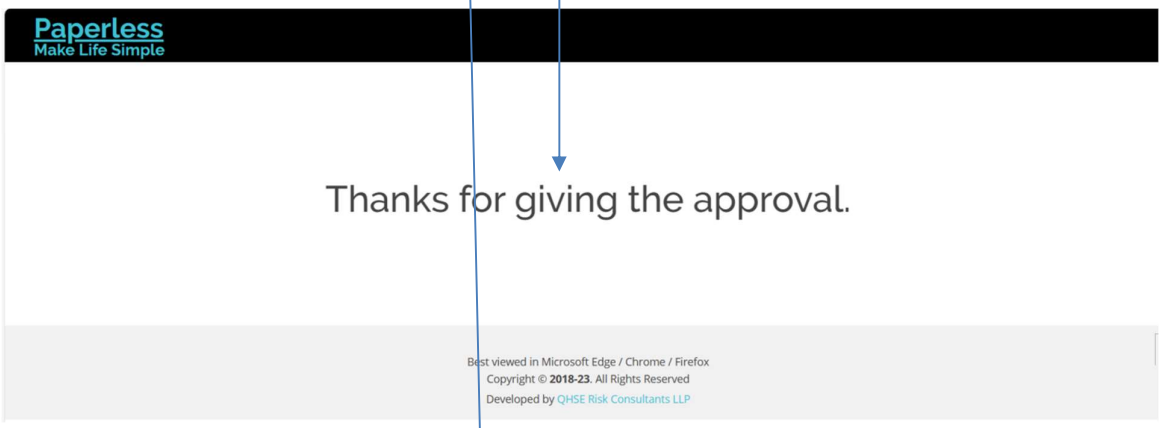
1. Upon clicking the ‘Give Approval’ button following page will open with the approvers name.
2. If you want to give approval then select the date.
3. Click on the ‘Signature’ button and sign the approval.
4. Sign on signature then clicks ‘OK’ button.
5. Click the ‘Approved’ button and the approval will be sent to the requestor.



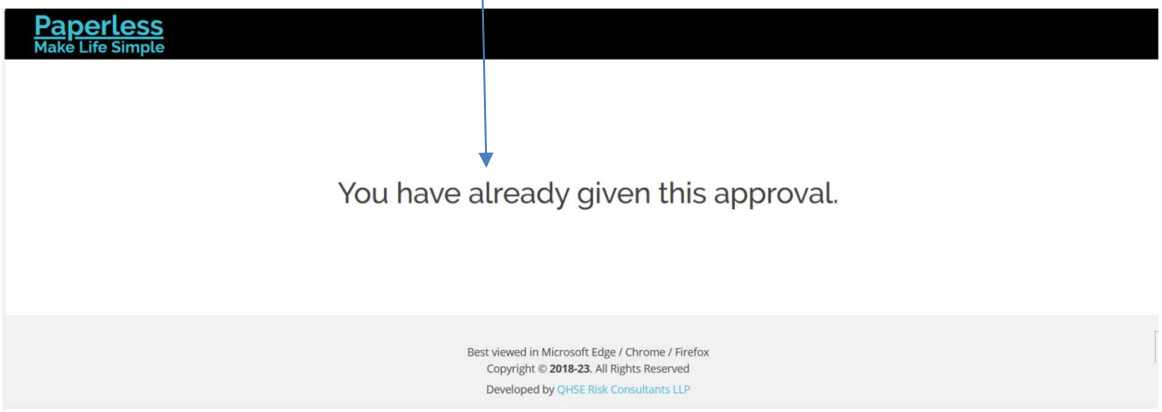
Online Approval of Manual thru Email

1. Once you give the approval the following page will open.
2. Here you can see 'Thanks for giving the approval' message.
3. If you try to approve the same management manual again then following message will show up.

First Image

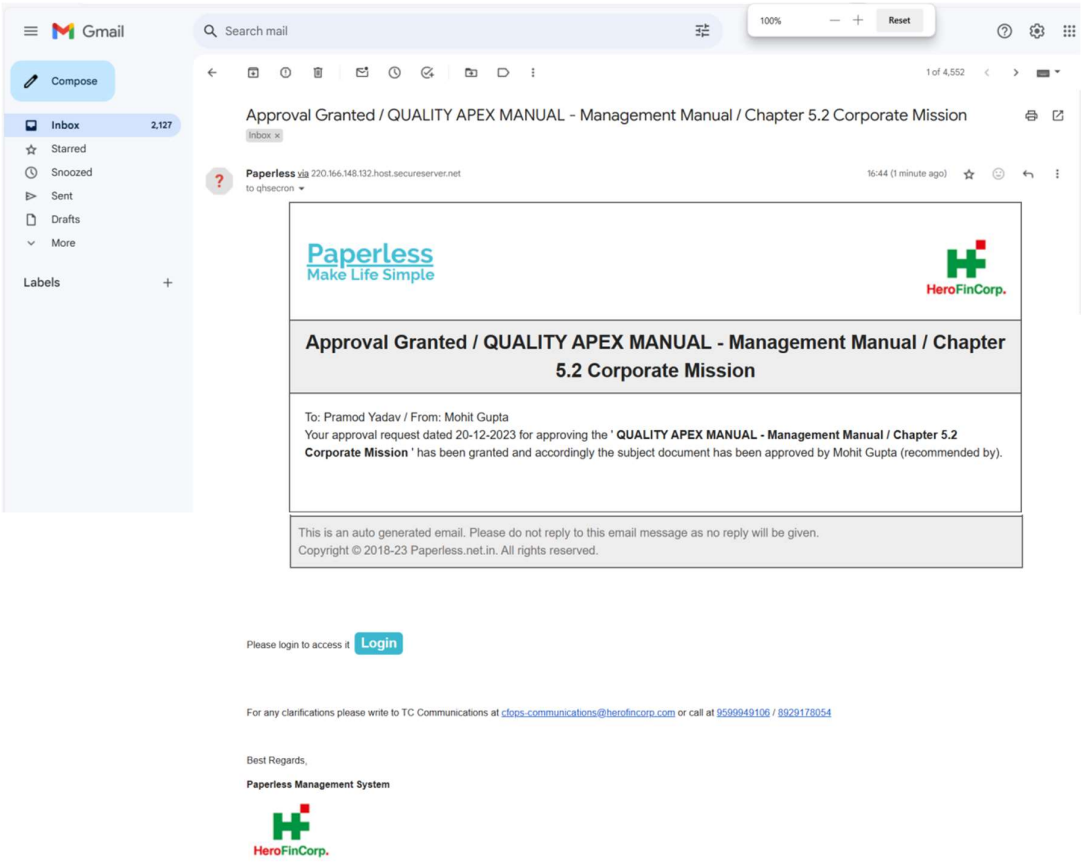


Second Image



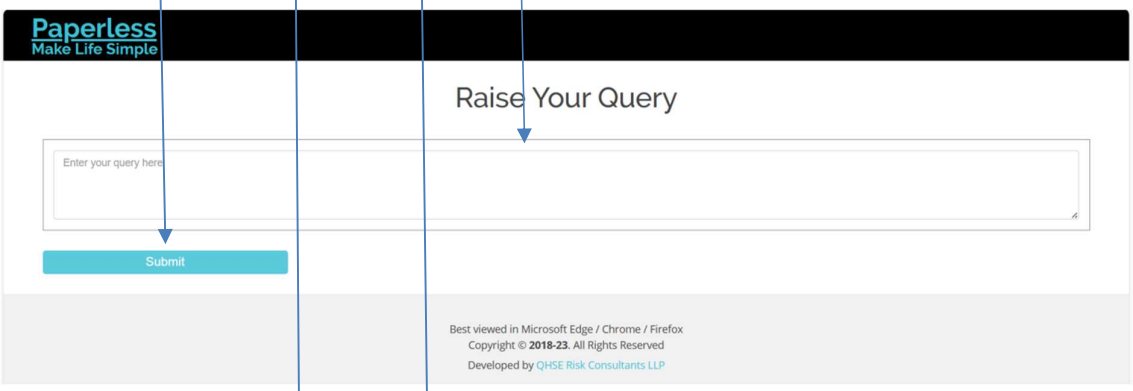
Management Manual Approval Granted Email

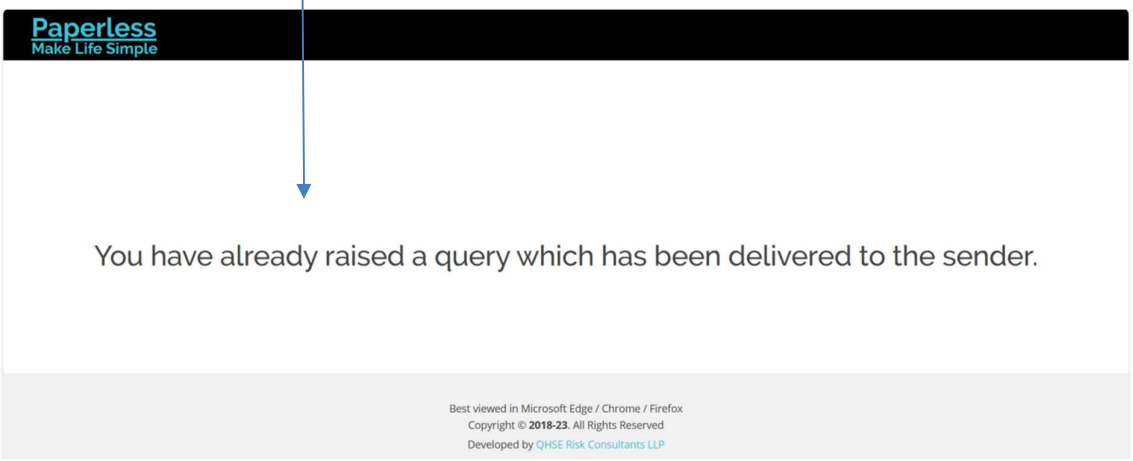
1. The management manual approval email will be received by the requestor and all approver(s) indicating that the specific approver has approve the manual.



Raising Query

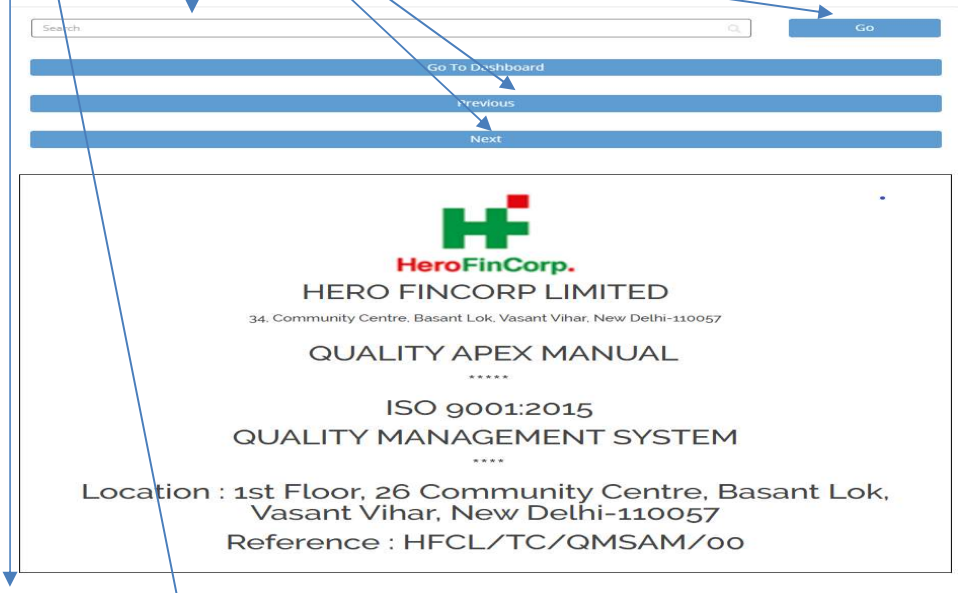
1. If you want some changes or updates in the management manual so you can raise your query here.
2. Click submit.
3. Here you can see a 'Thank you' message display on your screen.
4. If you try to raise the same management manual query again then following message will show up.

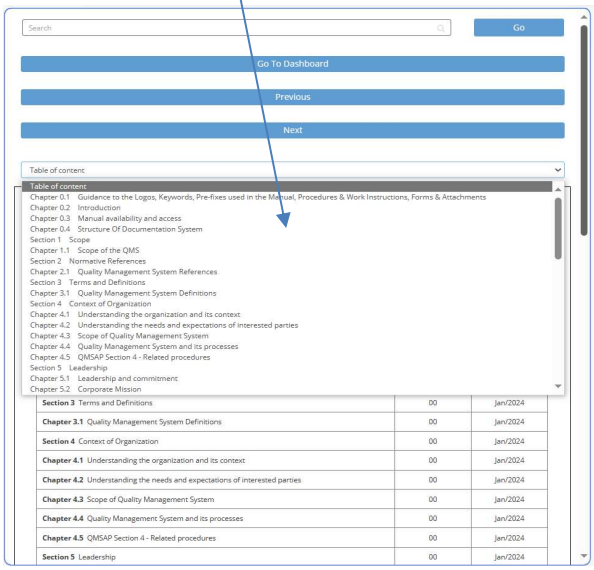


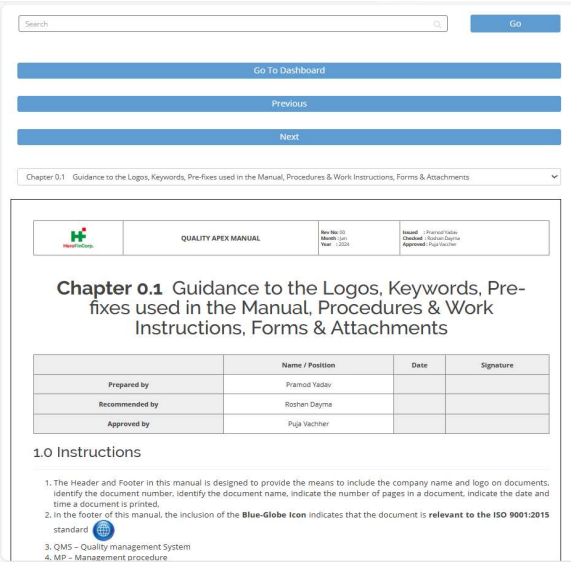


Viewing the Management Manual

1. Click on at the dashboard to view the manual
2. The cover page of the manual will open first
3. To view the entire manual page by page, keep on clicking ‘Next’
4. Click ‘Previous’ to go to previous page
5. After clicking ‘Next’ you will see the ‘Table of Contents’. Click on the drop-down menu and select any section or chapter of your choice to view them.
6. The relevant section or chapter will then open up
7. Search here if you want to search any section / chapter / content then enter the keyword and click ‘Go’.

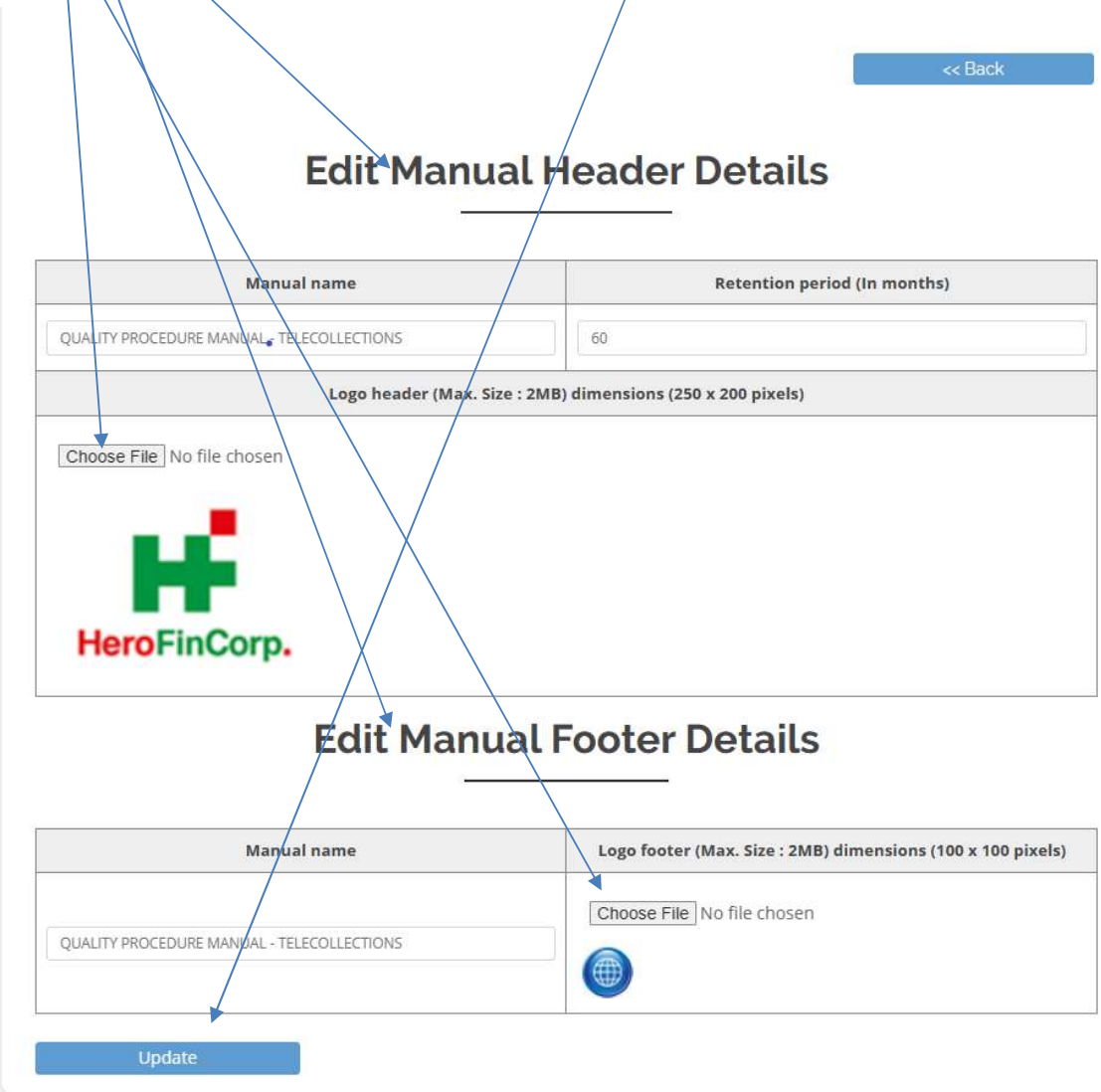






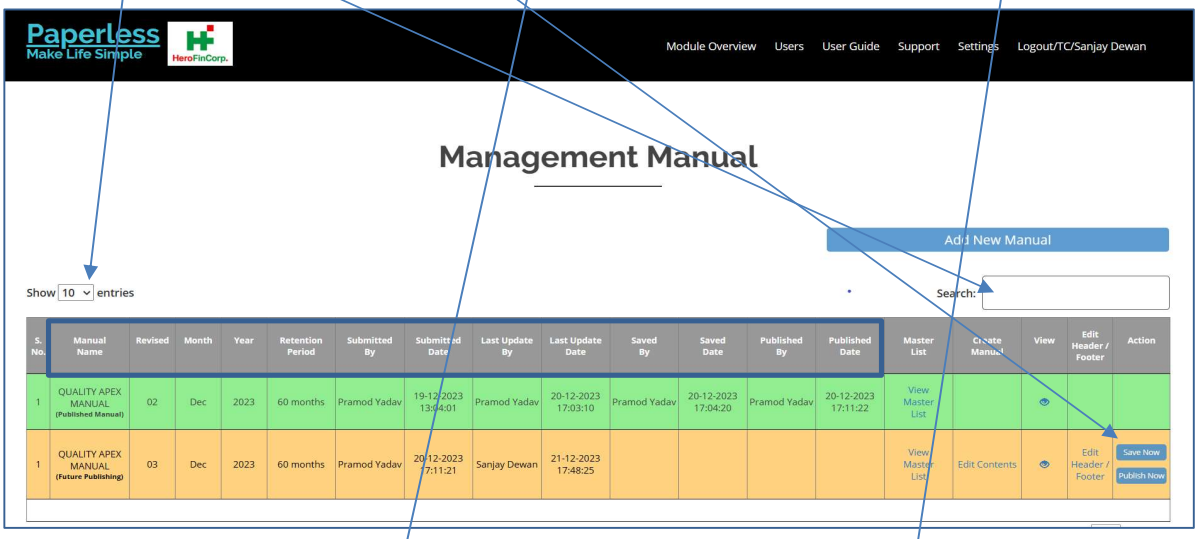
Editing the Header and Footer of the Manual

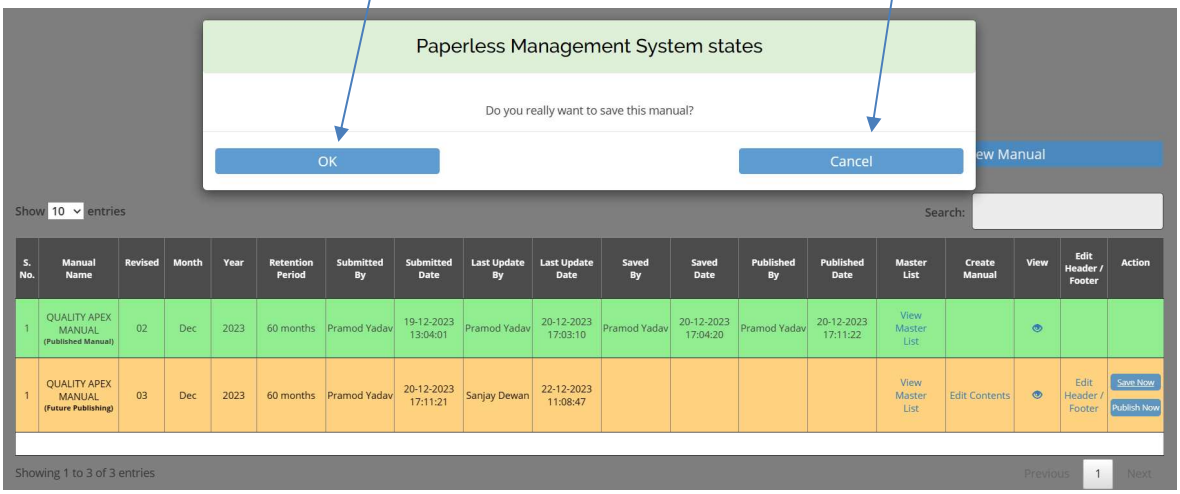
1. Click on ‘Edit Header / Footer’ at the dashboard to edit the header and footer of the manual.
2. ‘Edit Manual Header Details’ and ‘Edit Manual Footer Details’ page will show up
3. Fill / change / amend the details as required
4. Upload the logo / image by clicking on ‘Browse’ and choosing the logo.
5. Update your details to save the data entered.



Saving the Management Manual

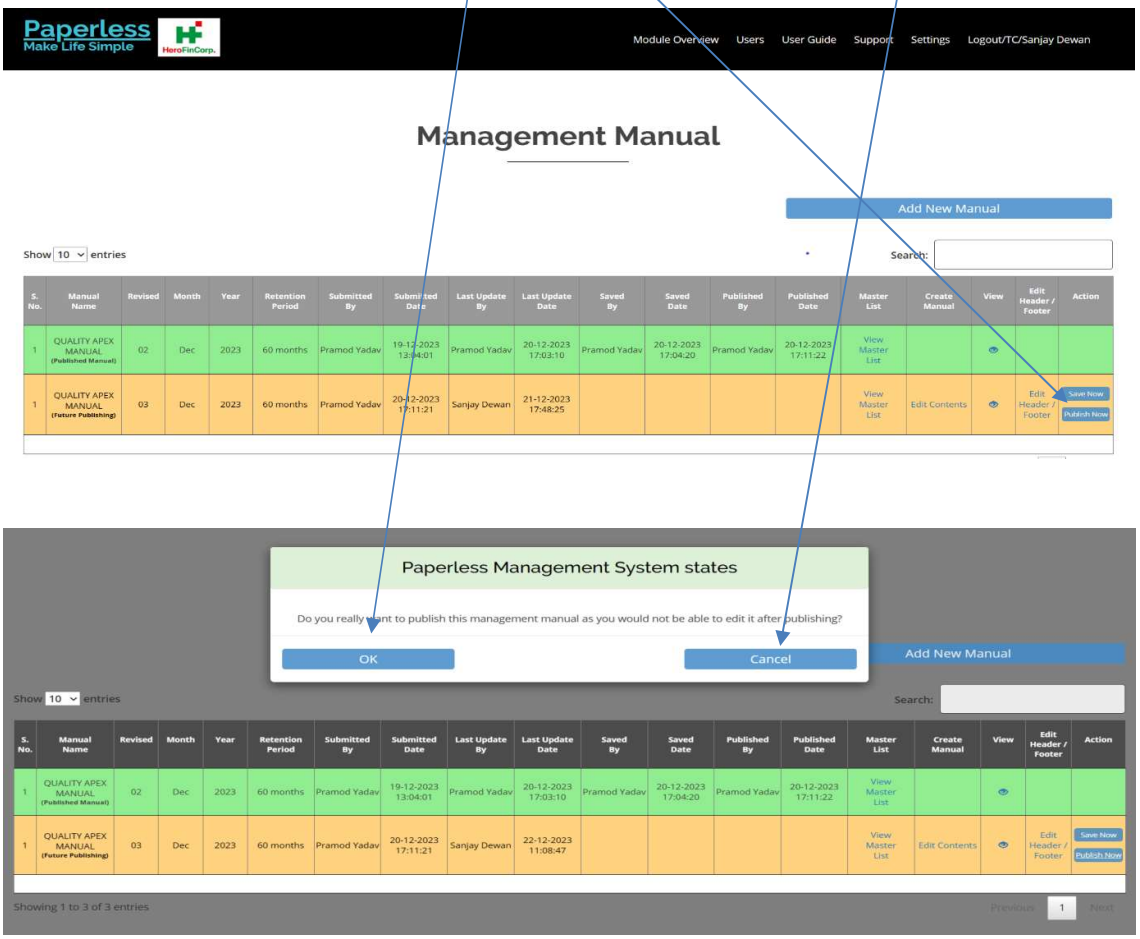
1. Every time you revise your manual it is recommended to save it immediately.
2. Click on save now at the dashboard to save the manual.
3. If you agree to save manually, click 'OK' in the alert box otherwise click ‘Cancel’.
4. The manual will be saved.
5. The last saved date and time will be shown in the dashboard.
6. The name of user who saved it last will be shown in the dashboard.
7. You can search here any type of field.
8. c

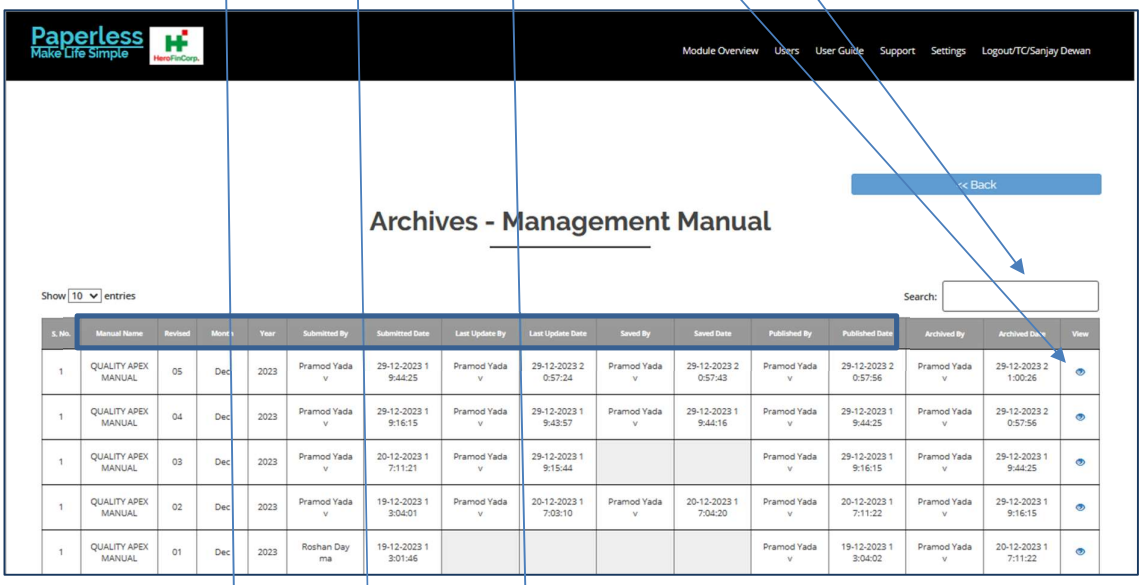
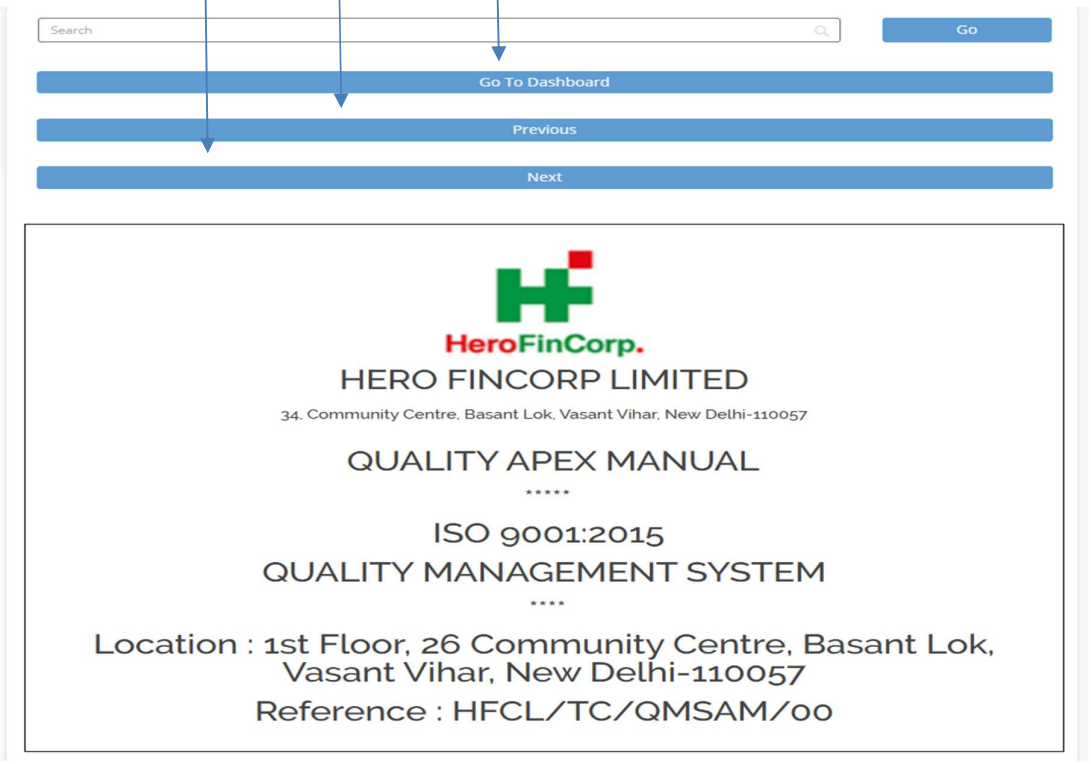




Publishing the Management Manual

1. Once your manual is ready for release you should publish it for everyone to view it.
2. Please remember that once you publish the manual no amendments or changes can be done .
3. Click on publish now at the dashboard to publish the manual click here.
4. If you agree to save manually, click 'OK' in the alert box otherwise click ‘Cancel’.
5. Click ‘OK’ again if you finally agree to publish the manual.
6. The manual will be published.
7. A new page will open up where you can choose to send email to all the users as per your choice by checking the box against their names at the right-side panel.
8. You can also choose to send email to any other third party by entering their email ID’s at the left-side panel.
9. Click on ‘Send Email’.
10. The emails will be sent to all chosen recipients.
11. Click on ‘Go to Dashboard’.
12. The published date and time will be shown in the dashboard.
13. The name of user who published it will be shown in the dashboard.
14. The previous manual will be automatically archived and can be sighted in the Archives module.



Archives Dashboard

1. Click on ‘Archives’ module and click ‘Management Manual’. You can view the all the archived management manuals.
2. You can search here any archived status management manual.
3. You can view any management manual by clicking on
4. Click on ‘Go to Dashboard’ to go back to the archived dashboard page.
5. Click on ‘Previous’ to go back to the previous page.
6. Click on ‘Next’ to go back to the next page.