# Work Instructions / SOP Manual Module

- 1. All SOP's / Work Instruction Manuals can be created in this module.
- 2. Click on the 'Module Overview' at the navigation bar.
- 3. Following page will open.
- 4. Click on 'Work Instruction / SOP Manual Module'.

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	Module Overview	
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Work Instructions / SOP Manual Module	Forms Manual Module	External Audit Management Module
Audit Management Module	Meetings Management Module	Nonconformity Management
Common Co	Reedback & Complaint Management Module	E-Circulars Module
Documents Vauit	Archives Module	

### Work Instructions / SOP Manual Module Dashboard

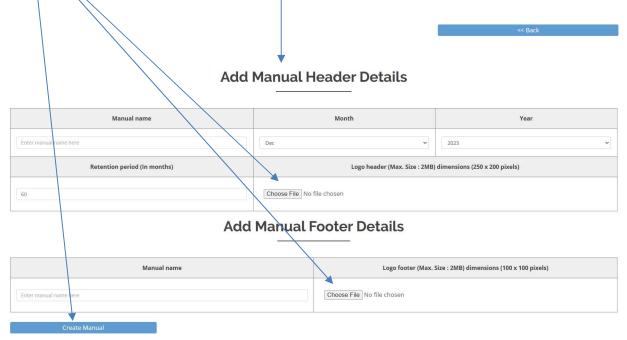
- 1. You can add new manual by clicking on 'Add New Manual'.
- 2. View master list by clicking 'View Master List',
- 3. You can edit the manual by clicking on 'Edit Contents'.
- 4. You can view the manual by clicking on the
- 5. You can edit the header and footer of the manual by clicking on 'Edit Header/Footer'.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

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	Telecollections Call Centre SOP (Published Manual)	0	Jan	2024	60 months	Pramod Yadav	13-12-2023 13:49:07	Sanjay Dewan	20-12-2023 16:17:09	Pramod Yadav	21-12-2023 12:45:51	Pramod Yadav	21-12-2023 12:46:03	View Master List		•	
	Telecollections Call Centre SOP (Future Publishing)	01	Dec	2023	60 months	Pramod Yadav	21-12-2023 12:46:03	Sanjay Dewan	22-12-2023 13:32:32	Sanjay Dewan	22-12-2023 13:33:01			View Master List	Edit Contents	• Edit Header Foote	

- 1. The color meaning in the SOP manual dashboard.
- 2. Green color means published manual completed.
- 3. : Orange color means future published in process.

### **Adding Header and Footer**

- 1. You can add the header and footer of the manual by clicking 'Add New Manual' on the dashboard.
- 2. Fill up the header and footer details.
- 3. Upload the logo / image by clicking on 'Choose File' and choosing the logo.
- 4. Rease re-check your form before create manual header and footer.
- 5. Click on 'Create Manual' for submit your details.

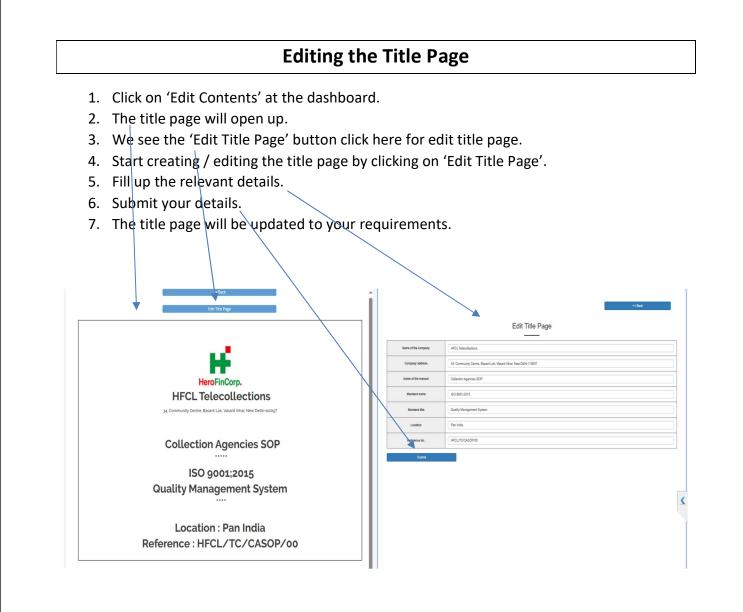


# Viewing the Master List of all Section and Chapters

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

#### **Master List**

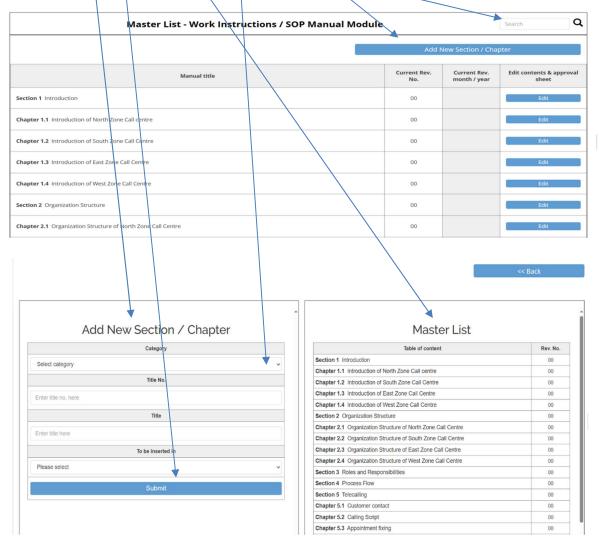
Table of Content	Rev. No.	Month / Year
Section 1 Introduction	00	
Chapter 1.1 Introduction of North Zone Call centre	00	
Chapter 1.2 Introduction of South Zone Call Centre	00	
Chapter 1.3 Introduction of East Zone Call Centre	00	
Chapter 1.4 Introduction of West Zone Call Centre	00	
Section 2 Organization Structure	00	
Chapter 2.1 Organization Structure of North Zone Call Centre	00	
Chapter 2.2 Organization Structure of South Zone Call Centre	00	
Chapter 2.3 Organization Structure of East Zone Call Centre	00	
Chapter 2.4 Organization Structure of West Zone Call Centre	00	
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## Adding New Section / Chapter

- 1. Click on 'Edit Contents' at the dashboard.
- 2. Scroll down till you see the 'Master List- Work Instruction / SOP Manual Module' 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.
- Choose the section in which you want to insert or add the new chapter from the dropdown 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.





# Editing the Content of SOP Manual

- 1. Click on 'Edit Contents' at the dashboard.
- 2. The cover page will open up.
- 3. Keep scrolling down till you see the 'Master List- Work Instruction / SOP Manual' page
- 4. You can edit any section or chapter by clicking on 'Edit',

Master List - Work Instructions / SOP Manual Module		Search Q
	Add N	New Section / Chapter
Manual title	Current Rev. No.	Current Rev. Edit contents & approval month / year sheet
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Chapter 1.1 Introduction of North Zone Call centre	00	Edit
Chapter 1.2 Introduction of South Zone Call Centre	00	Edit
Chapter 1.3 Introduction of East Zone Call Centre	00	Edit
Chapter 1.4 Introduction of West Zone Call Centre	00	Edit
Section 2 Organization Structure	00	Edit
Chapter 2.1 Organization Structure of North Zone Call Centre	00	Edit

- 5. A page will open up showing two panels.
  - $\circ$   $\;$  The 'Edit Content' panel will be on the left showing the chosen section or
  - chapter which you want to edit.

• 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 extra approval (prepared by, recommended by and approved by).
- 11. Submit your details upon completion.

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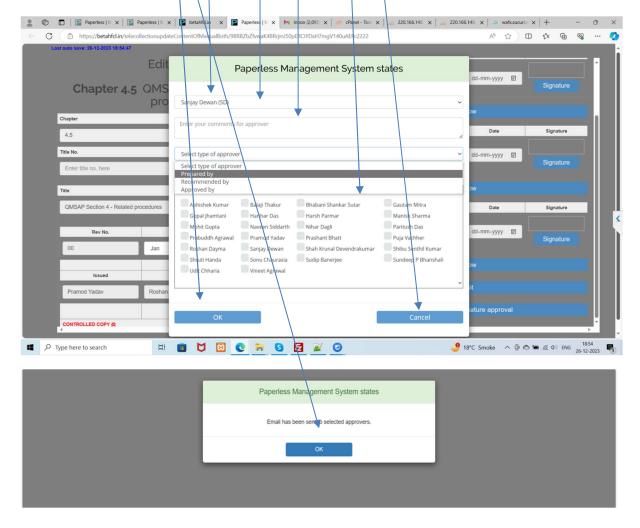
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- 12. Click on 'Send email for signature approval' by email.
- 13. An alert box will show up. Click 'OK' to save the edited contents.
- 14. Another alert box will show up reminding you if you have followed the protocol of highlighting the newly added 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.

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### 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'.

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## 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.

Paperless Make Life Simple		
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Name / Position	Date	Signature
Mohit Gupta	30-12-2023	Signature
Approved		
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Mohit Gupta	30-12-2023	Signature Clear
Approved		
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## Online Approval of SOP Manual thru Email

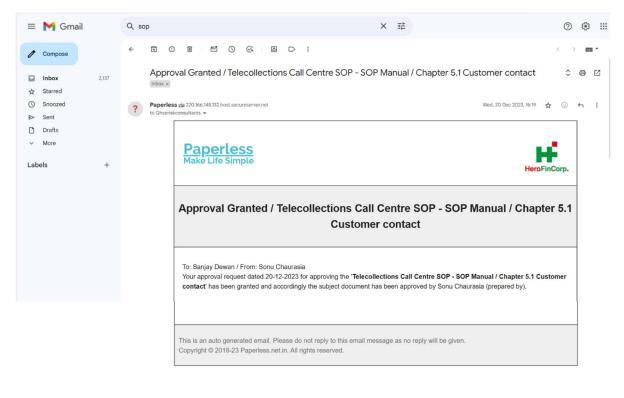
- 1. Once you give the approval the following page will open.
- 2. Here you can see 'Thanks for giving the approval' message.
- 3. If you try to approve the same management manual again then following message will show up.

First Image

Paperless Make Life Simple	Thanks for giving the approval.	
	Best viewed in Microsoft Edge / Chrome / Firefox Copyright © <b>2018-23.</b> All Rights Reserved Developed by QHSE Risk Consultants LLP	
Second Image		
Paperless Make Life Simple		
	You have already given this approval.	
	Best viewed in Microsoft Edge / Chrome / Firefox Copyright @ <b>2018-23</b> . All Rights Reserved Developed by QHSE Risk Consultants LLP.	

#### **SOP Manual Approval Granted Email**

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





For any clarifications please write to CF Ops Communications at clops-communications@herofincorp.com or call at 9599949106 / 8929178054

Best Regards, Paperless Management System



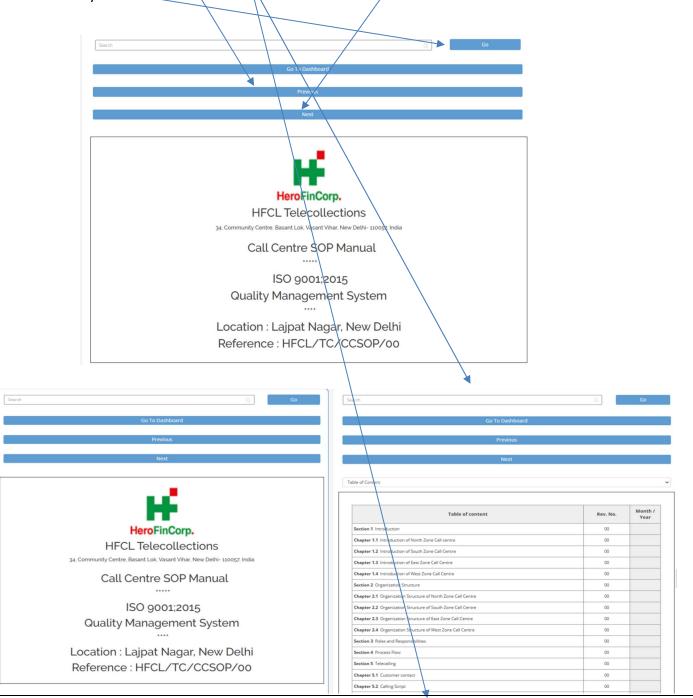
# **Raising Query**

- 1. If you want some changes or updates in the SOP 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 SOP manual query again then following message will show up.

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Raise Your Query	
Enter your query here	4
Submit	
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Thanks for raising the query which has been delivered to sender.	the
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You have already raised a query which has been delivered to the sende	er.
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#### Viewing the SOP Manual

- 1. Click on oat 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 keeps 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'.



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	Table of Content
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#### Editing the Header and Footer of the Manual

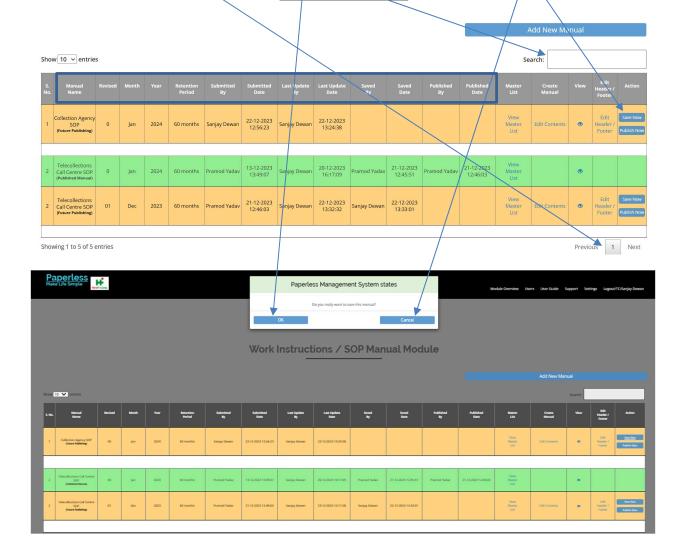
- 1. Click on 'Edit Header / Footer' at the dashboard to edit the header and footer of the manual.
- 2. 'Edit Manual Header Details' and 'Edit Manual Footer Details' page will show up
- 3. Fill / change / amend the details as required.
- 4. Upload the logo / image by clicking on 'Choose File' and choosing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

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#### Saving the SOP 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. Use pagination for viewing more entries on single page.

#### Work Instructions / SOP Manual Module



### Publishing the SOP 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 'QK' in the alert box otherwise click 'Çancel'.
- 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.

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#### Work Instructions / SOP Manual Module

#### **Archives Dashboard** 1. Click on 'Archives' module and click 'Management Manual'. You can view the all the archived management manuals. 2. Click the number shown under 'Archived' and you will go to the archived dashboard if available. 3. You can search here any archived status management manual if available. 4. Click on 'Back' to go back to the previous page. <u>Paperless</u> HÊ Module Ov Settings Logout/TC/Sanjay Dev Archives - Work Instructions / SOP Manual Module Show 10 v entries Search: No data available in table Showing 0 to 0 of 0 entries Previous Next