File Management System
User Guide

1. Objective:

File Management System main functions are to automatically generation policy numbers and digitally store mails for the quick retrieval in soft and hard copy when needed.

2. Generate Folio Number

A. Function: The module system automatically generates the policy number (which includes the volume and folio number) for every mail.

B. Usage: The user clicks on the **"+Generate Folio"** button at the top of the application, a dialog box pops up, then the user can generate the policy number by either of the following steps;

    i. enters the policy code (e.g 0900 for Security General) he wishes to generate and click **"S**earch" button, a table of policy name and code related to the code he entered are displayed, then he click on the "Generate Folio No." button next to the policy name, a dialog box pops up asking the user to confirm his selection. The user confirms and then generate the folio number by clicking the "Generate" this will automatically generate the policy code, volume and folio number, which he can then copy and paste on the mail been treated.

    ii. Alternatively, the user clicks on "View all Policy" button, a table of policy name and code is displayed, then the user enters the policy name or code on the search dialogue box at the top right of the table, and then clicks on the "Generate Folio No." button next to the policy name, a dialog box pops up asking the user to confirm his selection. The user confirms and the generate the folio number by clicking the "Generate" this will automatically generate the policy code, volume and folio number, which he can then copy and paste on the mail been treated.
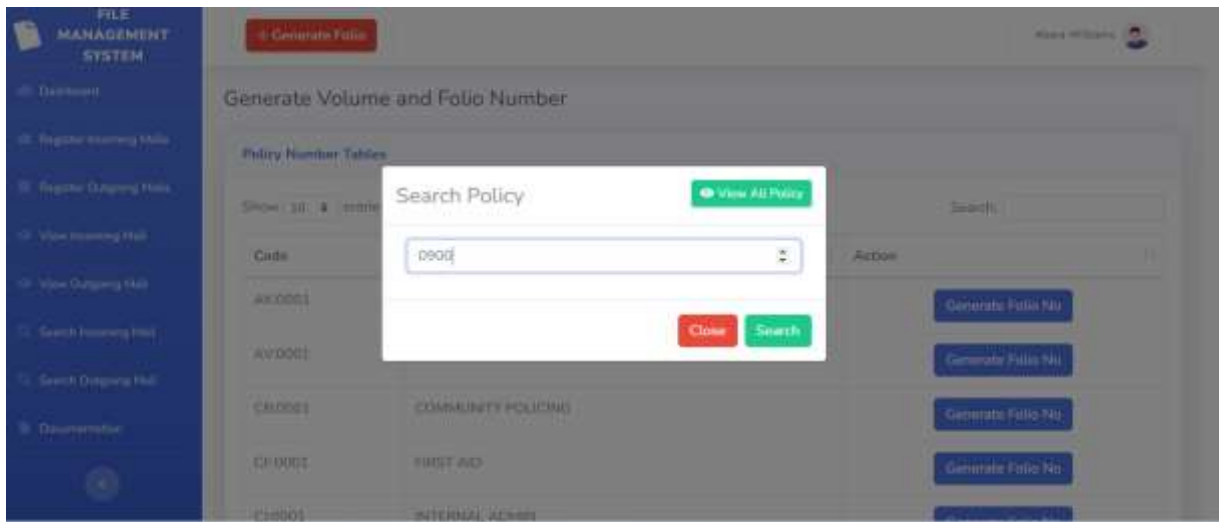
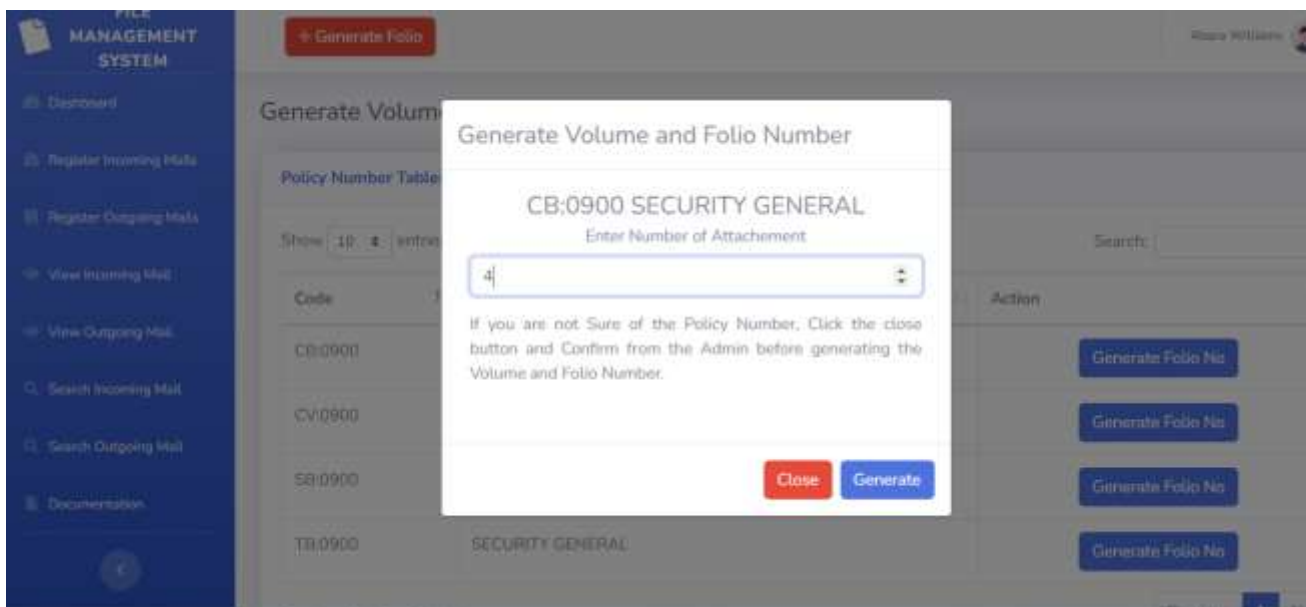*Figure 1: Generate Policy Number Search*

Figure 2: Generate Volume and Folio

3. Register Incoming Mail

A. Function: This module is used to register incoming.

B. Usage: the user enters the address of the incoming mail, date on the mail, date received, subject matter/title, policy number (if available) of the mail and clicks on submit to commit the registration into the database.

Figure 3: Register Incoming Mail

4. Register Outgoing Mail

A. Function: This module is used to register outgoing mails together with a scanned copy of the mail.

B. Usage: the user enters the address of the outgoing mail, date on the mail, date received, subject matter/title, policy number (if available) of the mail and finally uploads a scanned copy of the mail and clicks on submit to commit the registration into the database.
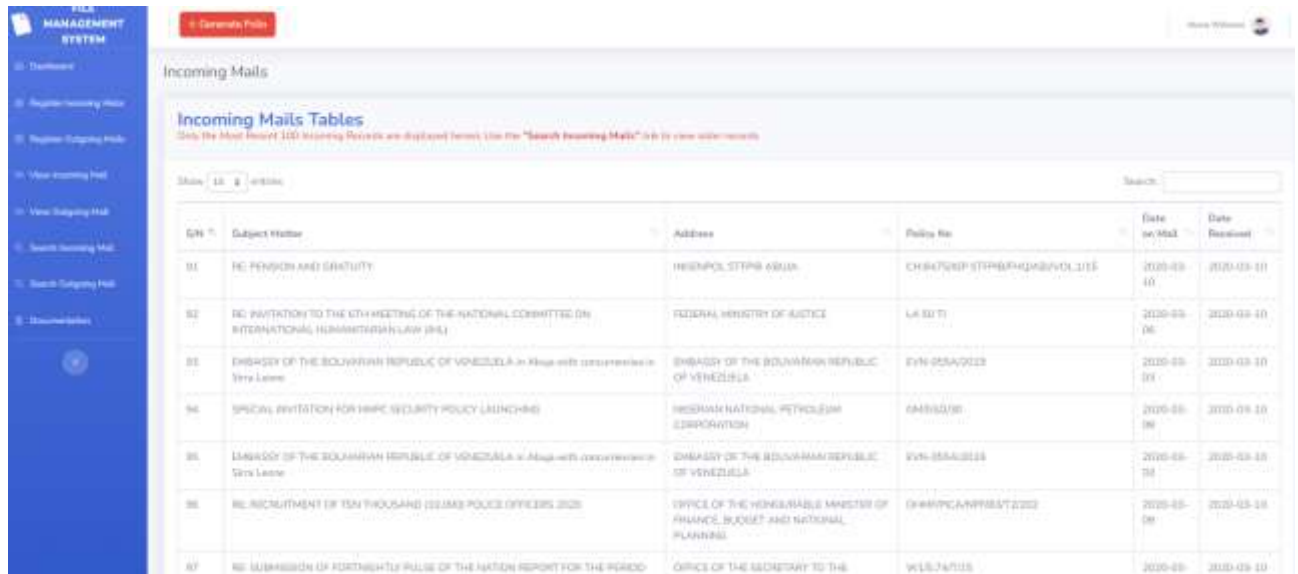
Figure 4:Register Outgoing Mail

5. View Incoming Mail Module

    A. Function: This module displays the most recent registered incoming mails entered into the system.

    B. Usage: the user search for an incoming mail by entering Subject matter/title of the mail, address of the mail, policy number or date uploaded in the search dialogue box. User can also download or edit the mails if given the privilege by the admin.

Figure 5: View Incoming Mail Module

6. View Outgoing Mail Module

    A. Function: This module displays the most recent registered outgoing mails entered into the system.

    B. Usage: the user search for an outgoing mail by entering subject matter/title of the mail, receivers' address of the mail, policy number or date uploaded in the search dialogue box. User can also download or edit the mails if given the privilege by the admin.

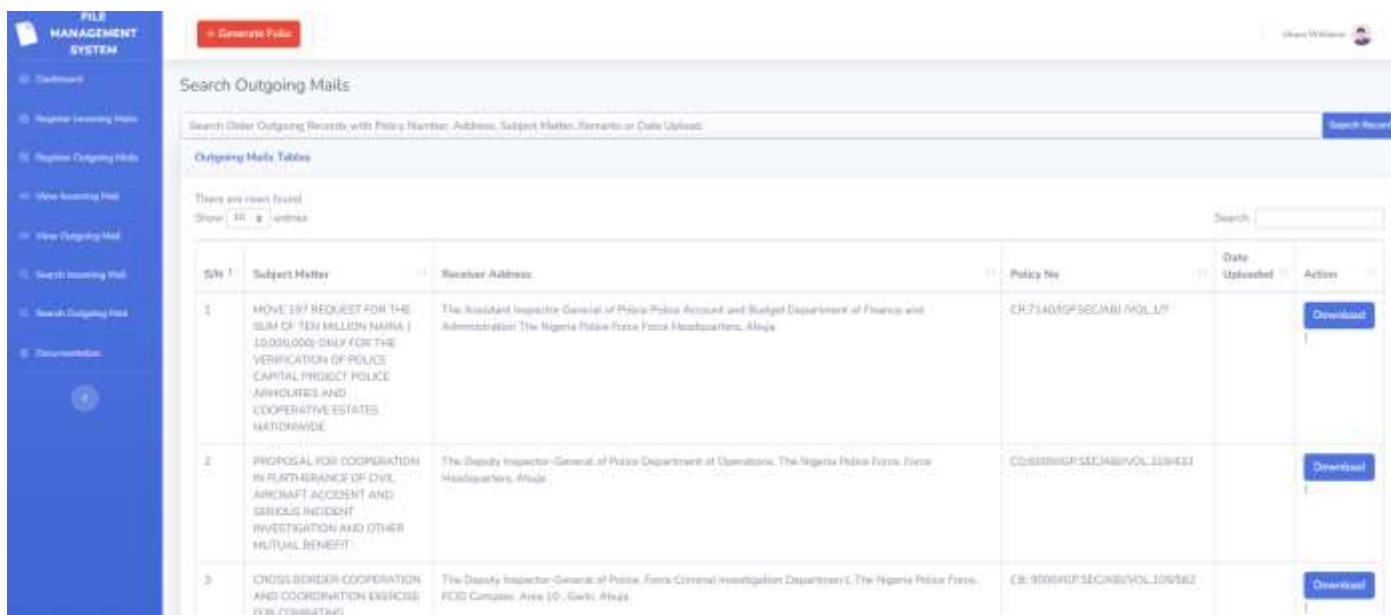*Figure 6: View Outgoing Mail Module*

7. Search Incoming Mail Module:

A. Function: This module is similar to the function of the "View incoming mail Module" only that it searches the entire database for incoming mail unlike the view module that searches the most recent.

B. Usage: the user searches any incoming mail by entering subject matter/title of the mail, address of the mail, policy number or date uploaded in the search dialogue box. User can also download or edit the mails if given the privilege by the admin.

Figure 7: Search Incoming Mail Module

8. Search Outgoing Mail Module:

A. Function: This module is similar to the function of the "View outgoing mail Module" only that it searches the entire database for outgoing mail unlike the view module that searches the most recent.

B. Usage: the user search of an outgoing mail by entering subject matter/title of the mail, receivers' address of the mail, policy number or date uploaded in the search dialogue box. User can also download or edit the mails if given the privilege by the admin.

Figure 8: Search Outgoing Mail Module