# eVitaran
## User Manual


Deepali Gokhale

# Contents

# Journal Distribution system

## Login

- To enter the Circulation department software [JDS], provide the respective username and password in the respective fields.
- The user name should be an email of the user.
- After entering username password, press 'Button' - '*Login*' to login the system.
- On correct entry of username and password user will be navigated to home page.
- Reset button is used to reset the username and password field to blank values.

## Forgot Password

If the use forgets the password, the user can use the 'Forgot Password' option to reset the password and then using change password option setting it to the desired one.

## Reset password

- Enter your email id and click on reset password.
- This will send the system generated password to the users mailed.
- Use this password to login the system for the next time.
- After entering the system generated password, you will be navigated to change password screen.

## Change password

- Enter the new password twice. As new password and reenter the password.
- Press Button Login.
- This will store the newly entered password and you will be navigated to the home page.

## Home

- Home page is the mail window of the JDS system.
- From this page user can navigate to different process option
- The process options are:
  - Inward
  - Subscriber/ Subscription
  - Mailing List
  - Reminders
  - Reports
  - Master Data
  - Bulk email sender
  - Templates
  - Help
- Logout in the top right corner is to exit the application
- Use the home menu from any screen to return to the home page of JDS.
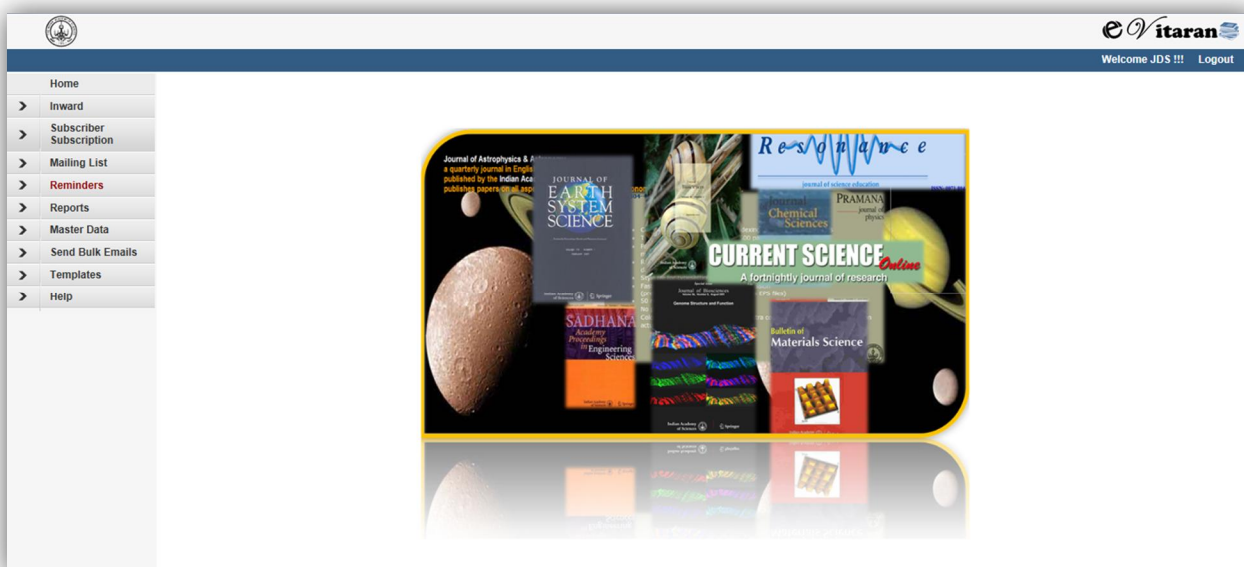
## Inward

The Processing in the circulation department starts on arrival of any mail/ letter/ call; this is called as "Inward". The inward can be a hard or soft letter. For all the inwards coming to the department a unique system generated number is given. This is called as Inward number. This number is written back on the inward paper. For all the received inwards an acknowledgement letter is sent to the requestor. Inwards can consist of the following i.e request for renewal, new subscription, reprints, advertisements, etc. then the cheque/ DD/ MO. If any financial transaction is involved, then the inward is sent to account department. Return for inward is created in case if the cheque or DD is not materialized. When the DD/cheque is encashed, the details are updated in inward and required action is done.

Out of all the coming inwards the important inward for circulation department are the following.

1. New Subscription
2. Subscription renewal
3. Request for invoice
4. Missing issue list
5. Change of address

*Steps for processing inward*

## Create Inward

- To enter the inward in the system use menu, Inward →Create Inward.
- New inward screen will come up



- From, Purpose and city are the mandatory fields.
- Based on the type of inward purpose can be selected.



- If the inward is coming from an Agent, then the selection of Agent is must.

- Payment details can be maintained using the options given in the given fields.



- There is also an option to select the subscriber while entering inward.
- Based on the entered data, subscriber is suggested.
- In case subscriber cannot be identified based on entered data, the search option for subscriber is provided.
- Reset Button is provided beside the select subscriber screen, this is to reset the selected subscriber.



- After entering the complete information related to inward, press 'Save' button to save the inward
- On saving the inward, new inward number is generated. This can be viewed in the inward number field.
- On saving the inward view inward page is loaded.

- You can use the 'Edit Inward' button to modify, if any incorrect information is maintained or to complete the remaining information.
- Press the 'Send Acknowledgement' button to send the acknowledgement.
- On pressing the 'Send Acknowledgement' button, 'Send Acknowledgement screen is loaded.
- Here the acknowledgement content will be displayed as per the type of inward.



- Fields are provided to enter letter number, letter date and custom text.
- Press 'print' and 'email' buttons to send acknowledgement via print and email medium respectively.
- Below mentioned sample text will send as acknowledgement.

- New Inward Button is there to navigate to the 'Create Inward' screen.

## View/ Edit Inward

- To view/Edit inward, the first step is to search inward.
- Inward can be searched using fields 'Inward Number', 'Cheque Number', 'City' and 'Date Range'.
- Use View/ Edit link in search result table to open the inward screen in display or edit the inward respectively.

- In Edit inward screen the receipt number can be updated.



- After modifying required information, press the save button.
- From Edit Inward screen, press the 'Send Return' button to check/DD Return.

## Send Return

- Press button 'Send Return' from Edit or Display screen of Inward. This will navigate to the 'Cheque/ DD return page.
- Here select the reason of return and press save.

- On Save, 'Print' and 'Email' button will be enabled.
- Press 'print' and 'email' buttons to send return via print and email medium respectively.
- Below mentioned sample text will send for 'Send Return'.
- Selected reason of return will be updated in the mail.



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E-mail: office@ias.ernet.in Website: http://www.ias.ac.in/

Date: 15/09/2012

Dear Sir/Madam,

The Cheque/DD No: 123214 dated 14/09/2012 for INR 1200.0 is returned herewith for want of the following information

- Cheque/ DD not in favour of Indian Academy of Sciences

Subscriber No : null
Inward No     : 12I-04232

Your's Truly
(Indian Academy of Sciences)

## Pending Inwards

- This screen lists all the inwards which are not processed and completed.
- Use 'Pending Inward' Menu option to navigate to pending inward screen.
- Default all the pending inwards will be listed.

- Pending inwards can be filtered on purpose, using purpose dropdown list.



- Select the inward and click the Next button for further processing of Inwards.
- Further processing of Inward will be covered in the respective section of process flow. Missing Issue, New Subscription, renew Subscription, Address Change, Request for Invoice, etc.



## Update Receipt Number:

- Update receipt Number flow is used to update the Receipt number coming from accounting department to Inward.
- Use menu 'Update Receipt Number' to navigate to update receipt number screen.
- Get the files coming from accounting system (Tally) in XML format and save.
- Press button 'Add Files', on the screen.

- On Pressing the Add Files Button, a file selection window will appear.
- Select the required file and press 'Open'.
- The file will be loaded to the screen
- Press 'Start Upload' button to update the receipt numbers to the respective inwards.
- Success or failure message will be shown as per the status of inward.

## Subscriber

## Mailing\ Back Issue List

Mailing list is list of labels/ stickers required for sending the issue of the Journal. This section contains two things mailing list and Back Issue List.



## Mailing List

Mailing list is list of labels/ stickers required for sending the current issue of the Journal. Mailing list is generated based on the publication date of a Journal. This list contains all the set of subscribers who has subscriber for the particular Journal and subscription is valid for that issue.

In mailing List Generation and Reprint of Journals is divided into two screens

1. Generate and Print Mailing List
2. Display and Reprint Mailing List

### Generate and Print Mailing List

- Generate and print mailing list option is used to generate mailing list for the first time.
- For this use submenu item 'Generate Print Mailing List'

- On Click of this 'Generate and Print mailing List page will be loaded.
- Select Journal Name, Year, Month, Volume and Issue number for which mailing list is to be generated.



- Click on check button. This will give message if the mailing list is already generated.



- If mailing list is not generated then the 'Generate mailing list button will be enabled.

- Press button 'Generate Mailing List'. The mailing list will be generated and loaded in the table below.
- Once mailing list is generated, the 'Print Label' and Print Sticker buttons will be enabled.



- Before printing select the 'No Header' Checkbox if Header is not required in Label.
- Check the periodical checkbox if the string 'PERODICAL' is to be printed in the label.
- Different print group are available to print the mailing list under 'Print Option'.

- o India 1 Copy
- o India Extra
- o Foreign
- Labels and stickers will be printed in the form of PDF.

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**New Delhi 110001 Delhi**

- Reset button to be used to reset the content of the screen.

## Display and Reprint Mailing List
- View/ Print mailing list option is used to generate mailing list for reprinting of Labels.

- For this use submenu item 'View/ Print Mailing List'
- On Click of this 'View/ Print mailing List page will be loaded.
- Select Journal Name, Year, Month, Volume and Issue number for which mailing list is to be printed.



- Click on check button. This will give message if the mailing list is not yet generated.



Mailing List not generated for Year: 2013, Journal Name: Pramana - Journal of Physics, Volume Number: 80, Issue: 3

OK

- If mailing list is not generated then the 'View Mailing List' button will be enabled.

- Press button 'View Mailing List'. The mailing list will be loaded in the table below.
- Once mailing list is loaded, the 'Print Label' and Print Sticker buttons will be enabled.



- Before printing select the 'No Header' Checkbox if Header is not required in Label.
- Check the periodical checkbox if the string 'PERODICAL' is to be printed in the label.
- Different print group are available to print the mailing list under 'Print Option'.
  - India 1 Copy

- o India Extra
  - o Foreign
- Labels and stickers will be printed in the form of PDF.



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Road                               New Delhi 110001 Delhi
New Delhi 110001 Delhi
```

- Reset button to be used to reset the content of the screen.

## Back Issue List

Back Issue list is list of labels/ stickers required for sending the back issues of the Journals for the subscribers who joins in between the subscription cycle. The back Issue list contains the list of all the issues of the journal for which mailing list is already generated.

In Back Issue List Generation and Reprint of Journals is divided into two screens

1. Generate and Print Back Issue List
2. View and Print Back Issue List

### Generate and Print Back Issue List

- Generate and print back issue list option is used to generate back issue list for the first time.
- For this use submenu item 'Generate /Print Back Issue List'
- On Click of this 'Generate /Print Back Issue List' page will be loaded.
- The Subscriber Number dropdown will be prefilled with the subscriber numbers for which back issue list is to be generated



- Select Subscriber Number or Date Range for which back issue list is to be generated.
- Press button 'Generate' to generate the back issue list.

- Use 'Print Label' and 'Print Sticker' button to print the back issue.
- Back issue will be printed in the form of PDF.
- The journals will be grouped to form only one or two labels based on page size for a back issues.
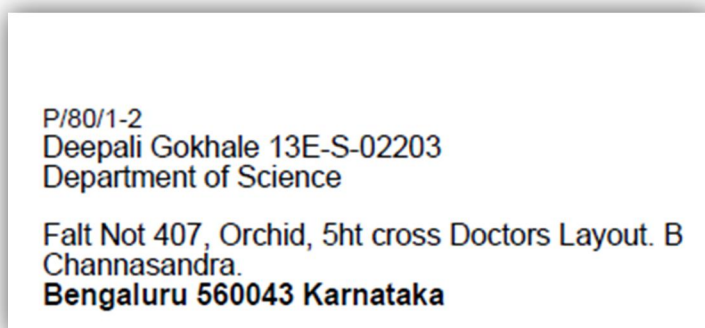


- Use checkbox 'Generate separate label for latest issue of P, JAA, CURR' for generating separate label for Pramana, Journal of Astronomy and Astrophysics and Current Science.

## View and Print Back Issue List
- View and print back issue list option is used to print back issue list which is already generated.
- For this use submenu item 'View /Print Back Issue List'
- On Click of this 'View /Print Back Issue List' page will be loaded.

- Enter Subscriber Number or Date Range for which back issue list is to be reprinted.
- Press button 'Search' to load the back issue list.



- Use 'Print Label' and 'Print Sticker' button to print the back issue.
- Back issue will be printed in the form of PDF.

P/80/1-2
Deepali Gokhale 13E-S-02203
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- The journals will be grouped to form only one or two labels based on page size for a back issues.
- Use checkbox 'Generate separate label for latest issue of P, JAA, CURR' for generating separate label for Pramana, Journal of Astronomy and Astrophysics and Current Science.

# Reminders

## Send Reminders





## Display and Resend Reminders

# Master Data

- Master Data is the key data of the system.
- This data can be maintained by only user with admin role.
- This data will be used by all the processes in the system.
- Following are the options for master data menu.
  - Region
    - Country
    - State
    - District
    - City
  - Subscriber
    - subscriber type
  - Journal
    - Journal
    - Journal Groups
  - Annual Information
    - Journal Details
    - Volume Details
    - Annual Subscription Rates
    - Print order
  - Agents

## Region Data

Region data comprise of Country, State, District and City. The purpose of this option is to maintain the data at one place and use in other places to avoid mistakes and discrepancies.

### Country

#### Add Country

- To add the country, click on menu 'Add Country'.
- Enter the new country name in the country field and press save.
- On save a unique id will be generated for country. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications

## Search Country

- To search the country, use the menu item 'Search Country'.
- This will navigate you to search country page
- Here enter country name of part of characters to in the country field.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the Country



## State

### Add State

- To add the state, click on menu 'Add State'.
- Enter the new state name in the state field and press save.
- On save a unique id will be generated for state. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications

## Search State

- To search the state, use the menu item 'Search State'.
- This will navigate you to search state page
- Here enter state name of part of characters to in the state field.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the state



# District

## Add District

- To add the district, click on menu 'Add District'.
- Enter the new district name in the district field and press save.
- On save a unique id will be generated for district. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications

## Search District

- To search the district, use the menu item 'Search District'.
- This will navigate you to search district page
- Here enter district name of part of characters to in the district field.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the district



## City

### Add City

- To add the city, click on menu 'Add City'.
- Enter the new city name in the city field and press save.
- On save a unique id will be generated for city. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications

## Search City

- To search the city, use the menu item 'Search City.
- This will navigate you to search city page
- Here enter city name of part of characters to in the city field.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the city



## Subscriber Data

Under Subscriber Master Data there is provision to maintain different subscriber type. The purpose of this option is to maintain the data at one place and use in other places to avoid mistakes and discrepancies.

### Subscriber Type

Subscriber Type defines that subscriber is of which category – Indian/ Foreign, Institute/ personal, Free/ Paid. If there are any specific number of free copies given to type of subscriber, etc.

### Add Subscriber Type

- To add the subscriber type, click on menu 'Add Subscriber Type'.
- Enter the new subscriber Type name in the subscriber type field.

- Enter the new subscriber Type code in the subscriber type code field. This is maximum of 6 character long
- Select the category of subscriber Indian/ Foreign, Institute/ personal, Free/ Paid from the drop down.
- Enter no of free copies associated with the free subscriber
- Enter any discount applicable for the subscriber type.
- Press save button.
- On save a unique id will be generated for subscriber type. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications



## Search Subscriber Type

- To search the subscriber type, use the menu item 'Search Subscriber Type.
- This will navigate you to search subscriber type page
- Here enter subscriber type code or subscriber type name or part of characters to in the subscriber type code or subscriber type field respectively.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the subscriber type information

## Journal Data

Under Journal Master Data there is provision to maintain different Journal and Journal Group. The purpose of this option is to maintain the data at one place and use in other places to avoid mistakes and discrepancies.



### Journal

This section is to maintain/ create Journal in the system. Here the unique information about the journal is maintained which is not changed annually. This comprises of Journal Name, Journal code (which can be used for short reference), ISSN number and Start Year.

### *Add Journal*

- To add the journal, click on menu 'Add Journal.
- Enter the new journal name in the Journal field.
- Enter the new journal code in the journal code field. This is maximum of 6 character long
- Enter start year and ISSN number
- Press save button.
- On save a unique id will be generated for journal. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications

## Search Journal

- To search the journal, use the menu item 'Search Journal'.
- This will navigate you to search journal page
- Here enter journal code or journal name or part of characters to in the journal code or journal field respectively.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the subscriber type information



## Journal Group

This section is to maintain/ create Journal Group in the system. The purpose of the grouping the journal together is to define the price at group level and also to add a Group of Journal in a single click to subscription.

## Add Journal Group

- To add the journal, click on menu 'Add Journal.
- Enter the new journal name in the Journal field.



- Enter the new journal code in the journal code field. This is maximum of 6 character long
- Enter start year and ISSN number
- Press save button.

- On save a unique id will be generated for journal. This id is for internal system reference.
- On save, 'Edit' button will be enabled.
- Press Edit for any modifications

## Display/Edit Journal Group

- To display the Journal Group content select the journal group from dropdown.



- Press button 'Display Journal Group'. The Journals under the journal group will be shown in search result section.

- Here enter journal code or journal name or part of characters to in the journal code or journal field respectively.
- Press 'Search' button to get the search result.
- Press View/ Edit links to display and modify the subscriber type information

## Process Flow

### Subscription

New Subscription

Renew Subscription

Create Free Subscriber

Create Summer Fellows

Request for Invoice

Missing Issue List – Claims

Address Change

Payment

## Bulk email Sender

- Bulk email sender enables you to send a mail to different people.
- The mail id should be comma or space separated
- There is also a provision to get the email ids from database.
- Email ids can be retried for different categories of subscriber.

*Steps to send bulk email:*

1. Press menu item Send Bulk email.
2. Enter email id in 'To' field
3. In case of email id error message will be shown
4. Select the check boxes if the reminder is to be sent to all the subscribers with valid email id in the category. (You can select multiple check boxes at a time.)
5. Enter subject and content.
6. Several formatting options like copy, paste, cut, Bold, Italic, underline, different font type, font sizes, font color etc. are provided for content text.
7. Press the 'Send Email' button to send mail
8. Success or Failure messages will be displayed on completion of sending email, as per the status.

## Templates

In this section you can find the agent excel upload template.

## Help

In this section you can find the Help Documentation for the eVitran Software.