Contents

[Section 1: General 2](#_Toc148969523)

[1. General 2](#_Toc148969524)

[2. Scope 2](#_Toc148969525)

[3. Approval for release 2](#_Toc148969526)

[Section 2: Manual for email 3](#_Toc148969527)

[1. Pre-requisites 3](#_Toc148969528)

[2. Pre-settings 3](#_Toc148969529)

[3. Procedures to login to email 3](#_Toc148969530)

[4. Procedures to create email and create draft. 3](#_Toc148969531)

[5. Procedures to open view email 5](#_Toc148969532)

[6. Procedures to view main subject and sub-subject 5](#_Toc148969533)

[7. Procedures to open post, files, participants list tab 5](#_Toc148969534)

[8. Procedures to pin email 6](#_Toc148969535)

[9. Procedures to mark all messages as read 6](#_Toc148969536)

[10. Procedures to add participant 6](#_Toc148969537)

[11. Procedures to reply mail 6](#_Toc148969538)

[12. Procedures to search email in library 6](#_Toc148969539)

[Section 3: Revision 8](#_Toc148969540)

[1. Revision history 8](#_Toc148969541)

# Section 1: General

## General

* 1. Prepare by: Teoh Soo Qing
  2. Date of preparation:16/10/2023
  3. Reference: Portal

## Scope

This covers for email creation, draft, and general functions in email.

## Approval for release

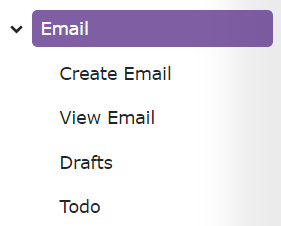
* 1. Approval by: Click or tap here to enter text.
  2. Date of approval: Click or tap to enter a date.

# Section 2: Manual for email

## Pre-requisites

Have access to the following module:

1. Email



## Pre-settings

## Procedures to login to email

|  |  |
| --- | --- |
| No | Description |
| 1 | Go to [Portal](https://portal.sunwardpharma.com/hrms/Login). |
| 2 | Below shows the definition of the section. |
| 3 | Fill in 1 and 2 using Portal login credential and proceed to login. You should be able to log in to the website. |

## Procedures to create email and create draft.

|  |  |
| --- | --- |
| No | Description |
| 1 | Go to email module in Portal and click create email. |
| 2 | Below shows the definition of the section.   1. From: creator name will be filled automatically and it cannot be edited 2. To: add recipients by selecting their name from dropdown 3. CC: add recipients by selecting their name from dropdown 4. On behalf: this is the person on whose behalf you prepare and send the mail 5. Follow up/ no follow up: if follow up is selected, the delegated person will receive the reply from the email as well; if no follow up is selected, the delegated person will not receive any reply from the email 6. Urgent: tick this checkbox if the topic is urgent.  will appear in the mail. 7. Allow add participants: tick this checkbox if you want to allow recipient to add in new participants in reply which is not in the initial list, if this is not ticked, list of user in the reply will always follow the list in initial topic. will appear in the mail. 8. Notify user: tick this checkbox if you want to notify recipient of this email. Recipient will receive a notification if they have enabled notifications on portal website. 9. Subject name: enter subject name and this is compulsory field 10. Text editor area: this is where you can write messages 11. Group: this field has a pre-set drop-down list and user can choose from the dropdown list to categorize the mail. This is not a compulsory field, you may leave it blank. If the email is generated from ‘case’, ‘company activity’, or ‘dms document’ module, this field will inherit the information automatically and user can’t change it. If you can’t find suitable option in the list, you can request to add it via [request link](https://forms.office.com/r/P1SqPdCdtz). 12. Category: this field has a pre-set drop-down list and it will depend on the selection in ‘group’. This is not a compulsory field, you may leave it blank. If the email is generated from ‘case’, ‘company activity’, or ‘dms document’ module, this field will inherit the information automatically and user can’t change it. If you can’t find suitable option in the list, you can request to add it via [request link](https://forms.office.com/r/P1SqPdCdtz). 13. Action: this field has a pre-set drop-down list and it will depend on the selection in ‘category’. This is not a compulsory field, you may leave it blank. If the email is generated from ‘case’, ‘company activity’, or ‘dms document’ module, this field will inherit the information automatically and user can’t change it. If you can’t find suitable option in the list, you can request to add it via [request link](https://forms.office.com/r/P1SqPdCdtz). 14. Others tag: select tag from dropdown list. All tags created by users are store in tag library so it is advisable for users to check if an existing tag exists before creating a new one. 15. Due date: set the due date by selecting the date from date picker 16. Attachment: click select file to attach file in the topic 17. Reset: click to clear and reset all field back to default 18. Sent: click to send out the mail 19. Draft: click to convert this mail info draft and continue to edit later |
| 2 | To create email, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31254&&type=latest) to create email. |
| 3 | To create draft, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31255&&type=latest). |

## Procedures to open view email

|  |  |
| --- | --- |
| No | Description |
| 1 | Go to email module in Portal and click view email. |
| 2 | Below shows the definition of the section.   1. All: this shows all the emails you have sent and received 2. Assign to: this shows main subjects and any of the sub-subjects assigned to you at any one time 3. CC: this shows all main subjects and any of the sub-subjects that are CC to you from the initial receipt 4. Sent: this shows all emails that you have sent out 5. Library: this place keeps all the email you have access to even without archive. Draft will not show here. |
| 3 | Click the tab that you would like to open and it will show relevant email. |

## Procedures to view main subject and sub-subject

|  |  |
| --- | --- |
| No | Description |
| 1 | To view main subject and sub-subject, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31260&&type=latest). |

## Procedures to open post, files, participants list tab

|  |  |
| --- | --- |
| No | Description |
| 1 | There are few tabs to access at top of email. |
| 2 | Below shows the definition of the section.  Post: this shows the email content  Files: this shows list of file in the email  Todo:  Participant list: this shows list of participants in the email  Tags: this shows the tag library |
| 3 | The content of ‘posts’ will only appear after you open a mail. Posts will always open in default whenever you open a mail. You can click on other tab to view its content. |

## Procedures to pin email

|  |  |
| --- | --- |
| No | Description |
| 1 | To pin email to top, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31257&&type=latest). This can only be done at ‘assign to’. |

## Procedures to mark all messages as read

|  |  |
| --- | --- |
| No | Description |
| 1 | To mark all messages as read for unread message, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31256&&type=latest). This can only be done at ‘all’ and ‘assign to’. |

## Procedures to add participant

|  |  |
| --- | --- |
| No | Description |
| 1 | To add participant, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31313&&type=latest). This can only be done by initiator of the email when the email setting does not allow add participant at the first place. |

## Procedures to reply mail

|  |  |
| --- | --- |
| No | Description |
| 1 | To reply mail, refer to [link](https://portal.sunwardpharma.com/#/fileProfileTypeDownload?id=31258&&type=latest). |

## Procedures to search email in library

|  |  |
| --- | --- |
| No | Description |
| 1 | Go to library in email. The listing is blank in default. |
| 2 | Below shows the definition of the section.   1. Search bar: can enter and search based on keyword 2. Apply (at search bar): click to run search for keyword entered at search bar 3. Filter: click to open the filter search section 4. From: click to select the user name from dropdown 5. Subject: enter the keyword of subject 6. Group: can select from dropdown 7. Category: can select from dropdown and the dropdown varies with the group selected 8. Action: can select from dropdown and the dropdown varies with the category selected 9. Others Tag: 10. From: the date will be set as the first day of the current month from last year in default 11. To: the date will set as current date in default 12. Close (at filter): close the filter 13. Apply (at filter): click to run the filter search |
| 3 | Fill in 1 and click 2 to run the search. If no data is found, it will show ‘no data to display’. |
| 4 | If you want to search in detail, click 3. Fill up 4 to 11 if necessary and click 13 to execute the search. Take note that the search will not be executed based on the filter criteria if you click 2 instead of 13. |

# Section 3: Revision

## Revision history

|  |  |  |
| --- | --- | --- |
| Effective | Version No | Description amendment |
|  |  |  |