

Add Noting

This feature is required to add Green or Yellow Note in an electronic file opened from File Inbox/Inbox Folder/ Created/ Parked.

Add Green Note

In order add green note in an electronic file user needs to follow following steps.

STEPS TO FOLLOW:

1. Click '**Add Note**' icon to expand and then click '**Green Note**' Icon in noting panel of electronic file inner page.

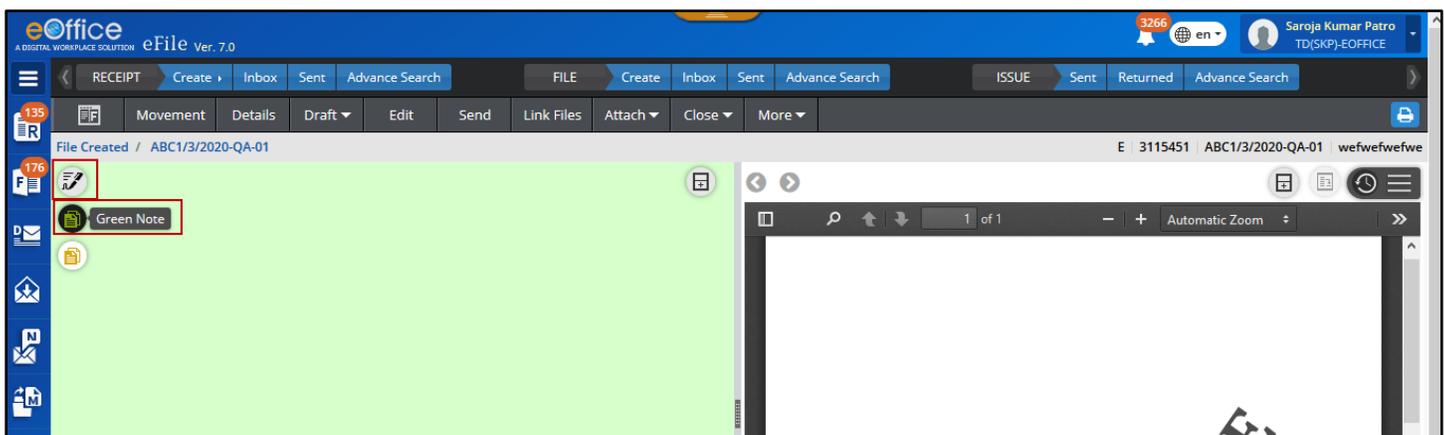


Figure 201

Note:

- User will be able to select Standard/ User defined Quick noting (English, Hindi, Other language) by Clicking on respective Sub Menu of Quick Noting action button available in Note Action Header.
- Option to Discard, Save and upload Attachment will be available for green note.

2. Enter either text by typing or paste copied data (text, hyperlink and image) in the web editor or inserts table (using editor toolbar).

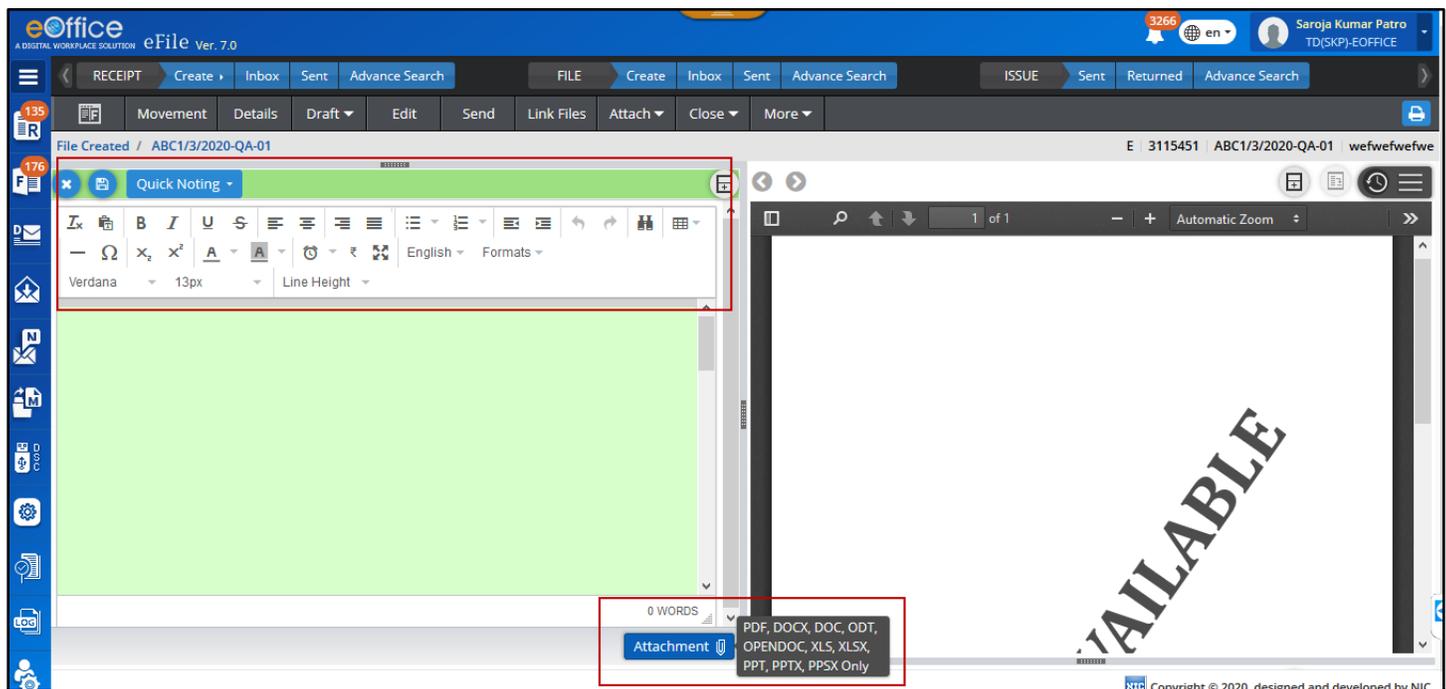


Figure 202

Note:

- Pasted content having hyperlinked data/URLs should be saved as plain text.

3. Click **Attachment** icon to attach document (PDF, DOCX, DOC, ODT, XLS, XLSX, PPT, PPTX, PPSX format) if require(**Figure 202**).

Note:

- Document attached can be of maximum 25MB.
- Clicking on Attached document will allow the user to download the document.
- Clicking on Remove icon on attached document will remove the attached document.

4. Click **Save** icon to finalize the Green note.

Note:

- Content either typed or copied and pasted from word document in editor should get Auto Saved if not saved by user.
- If Text editor has blank note it will not be Auto saved or Saved.
- Last Saved date and time (dd/mm/yyyy hh:mm:ss AM/PM) should be updated in Note Action Header after getting auto saved.
- Color of Note Action Header should be changed for unsaved (Red) and Saved (Green) note.
- Legends will be displayed in File Inbox/Inbox Folder/Created/Parked list to indicate file having saved Green note.

Edit Saved Green Noting

1. Click “**File Number**” link from Inbox/Inbox Folder/Created/Parked list. (Tiny MCE Web editor is displayed in editable mode with existing noting content.)
2. Edit the content either by typing or pasting copied data (text, table, hyperlink and image) or inserting table by using editor toolbar to make changes in the existing note.
3. **Attach** or **Remove** attached document.
4. Click **Save** icon to update the noting

Discard Saved Green Noting

1. Click “**File Number**” link from Inbox/Inbox Folder/Created/Parked list. (Tiny MCE Web editor is displayed in editable mode with existing saved noting content.)
2. Click **Discard** icon on Note Action Header.
3. Confirm deletion of noting in alert popup. On confirmation, green note will be discarded and blank text editor is displayed with option to Add Note.

Note:

- In case the green note was created by confirming the Yellow note, and if user Discard the green note, then the yellow note from which this green note is confirmed, will be restored along with all the versions of yellow note.