

Create Draft (DFA) in an Electronic File

Draft for approval (DFA) can be created in a standalone Electronic File (Not Attached with any other File/Receipt) available in Inbox/Inbox folder/Created/Parking list. There can be three different nature of Draft that can be created.

- i. New Fresh Draft
- ii. Reply Draft
- iii. Reminder Draft

Create a New Fresh Draft

STEPS TO FOLLOW:

1. Click **Create New Draft** submenu of Draft menu from file inner page menu bar.

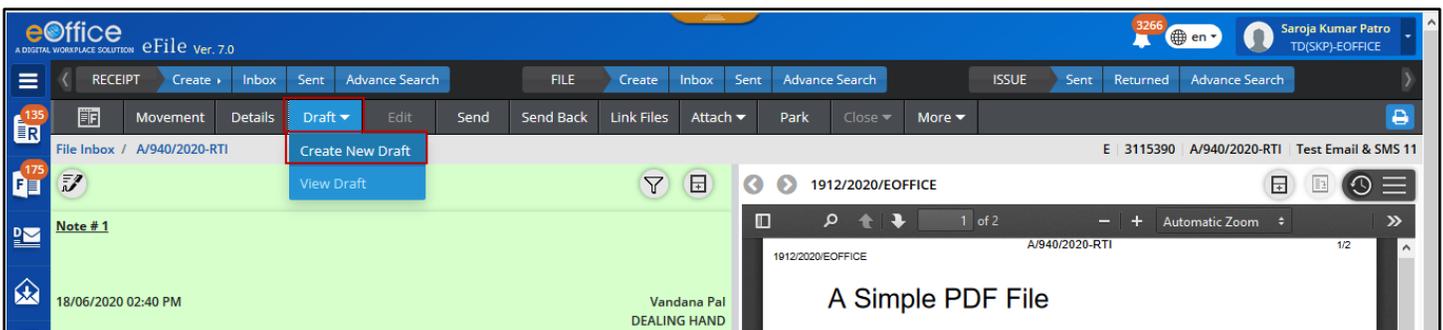


Figure 264

2. Select from pre-defined draft **template** or **Upload** a file (*PDF or Word Document Only upto 25 MB*) or **Type** or paste copied content in the text area to create draft content.

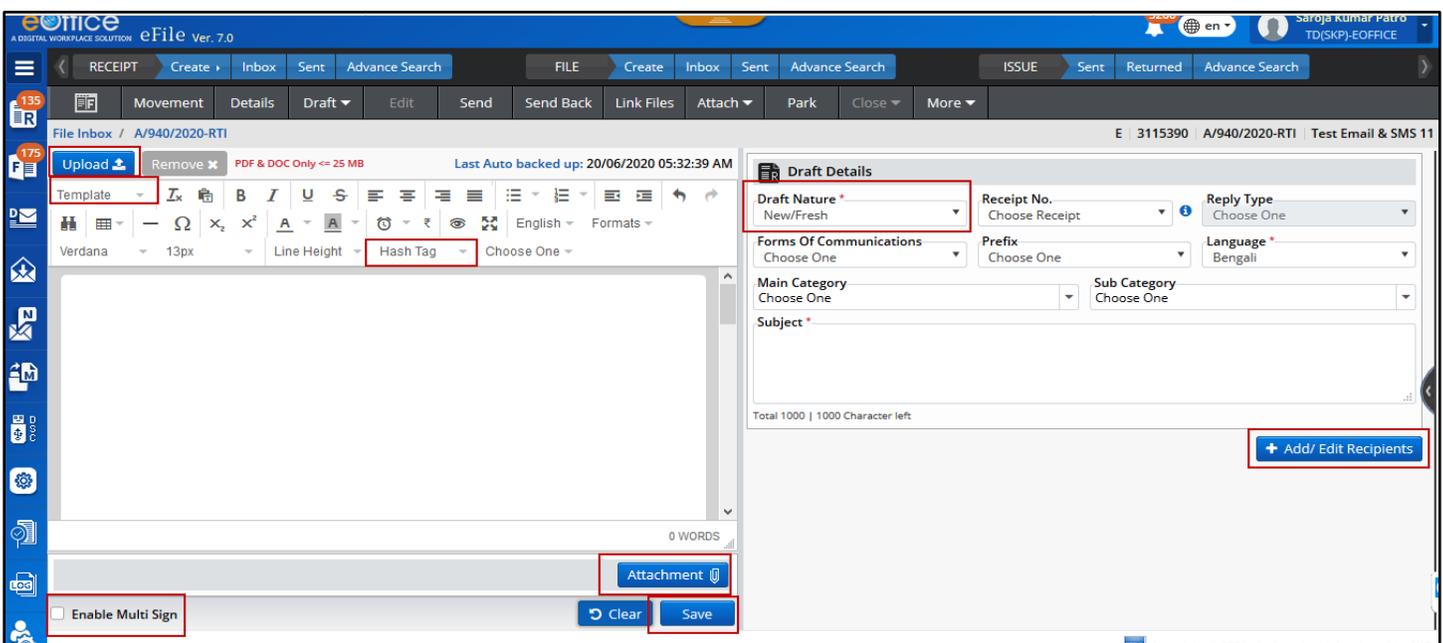


Figure 265

3. Add **Hash Tag** if required (*If draft created using Text Editor or Template*)
4. Add **Attachment** if any.
5. Check **Enable Multi Sign** checkbox. (*If draft needs to be signed by multiple signing authority*)
6. Fill basic metadata categorized under Draft Details.
7. Click **Add/Edit Recipients** (*Optional at time of Draft Creation*) action button.
8. Click **Save** to Save the draft and generate unique draft number.

Create a Reply Draft

Important Points:

- ✓ Receipt (*of same or external instance*) must be attached as a correspondence in file.
- ✓ Attached receipt in correspondence should not be in closed state.

STEPS TO FOLLOW:

1. Click **Create New Draft** submenu of Draft menu from file inner page menu bar. **Figure 264**
2. Select from pre-defined draft **template** or **Upload** a file (*PDF or Word Document Only upto 25 MB*) or **Type** or paste copied content in the text area to create draft content.
3. Add **Hash Tag** if required (*If draft created using Text Editor or Template*)
4. Add **Attachment** if any.
5. Check **Enable Multi Sign** checkbox. (*If draft needs to be signed by multiple signing authority*)
6. Fill basic metadata categorized under Draft Details.
7. Select Draft Nature as Reply (*Available only when file has active receipts in correspondence*)

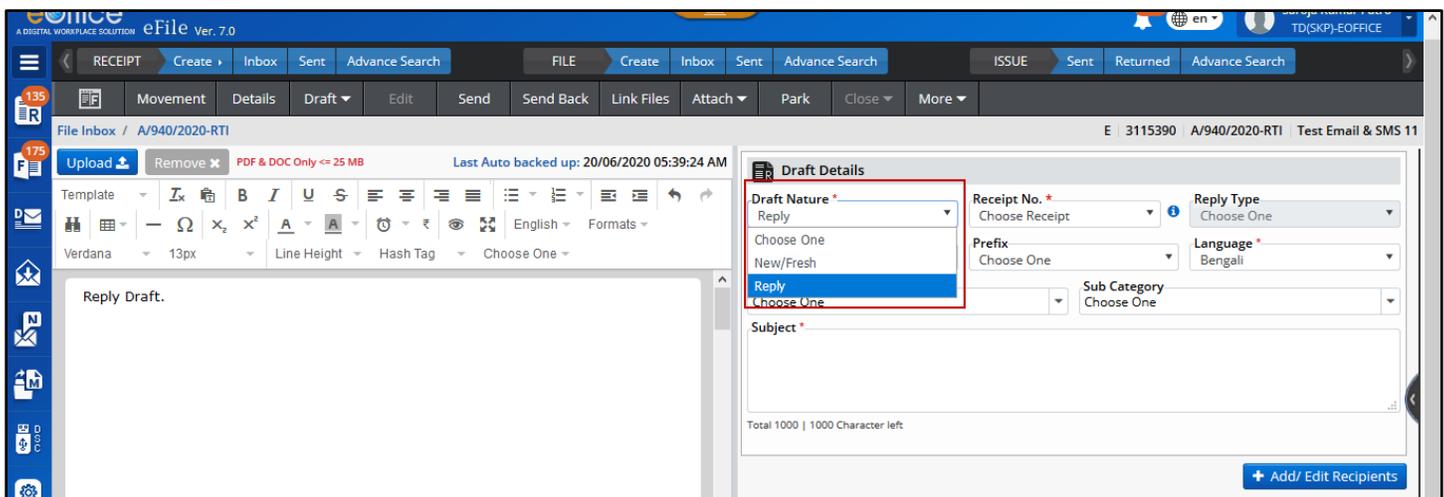


Figure 266

8. Select Receipt No. if there are multiple receipts in ToC.

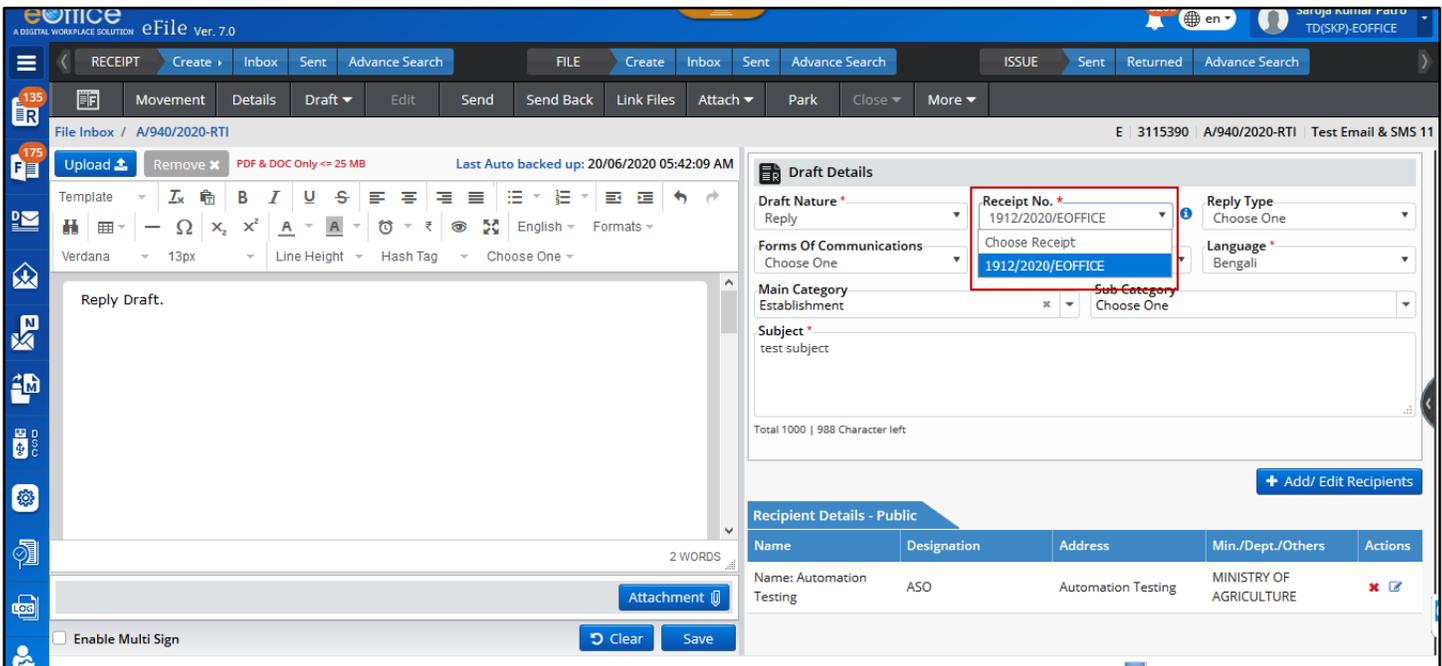


Figure 267

Note:

- If only one receipt is available in ToC, it will be selected by default
- **Recipient details, Main Category, Sub Category** and **Subject** of selected receipt are auto fetched in respective metadata fields.
- Clicking icon will display details of Receipt.

9. Select **Reply Type** (Optional) from Drop down list.

10. Click **Add/Edit Recipient** (Optional at the time of Draft Creation) action button for adding more recipient.

11. Click **Save** to Save the draft and generate unique draft number.

Create a Reminder Draft

Important Points:

- ✓ Issue must be present in correspondence of file.

STEPS TO FOLLOW:

1. Click **Create New Draft** submenu of Draft menu from file inner page menu bar. **Figure 264**
2. Select from pre-defined draft **template** or **Upload** a file (*PDF or Word Document Only upto 25 MB*) or **Type** or paste copied content in the text area to create draft content.
3. Add **Hash Tag** if required (*If draft created using Text Editor or Template*)

4. Add **Attachment** if any.
5. Check **Enable Multi Sign** checkbox. (If draft needs to be signed by multiple signing authority)
6. Fill basic metadata categorized under Draft Details.
7. Select **Draft Nature** as **Reminder**(Available only when file has Issues in correspondence)

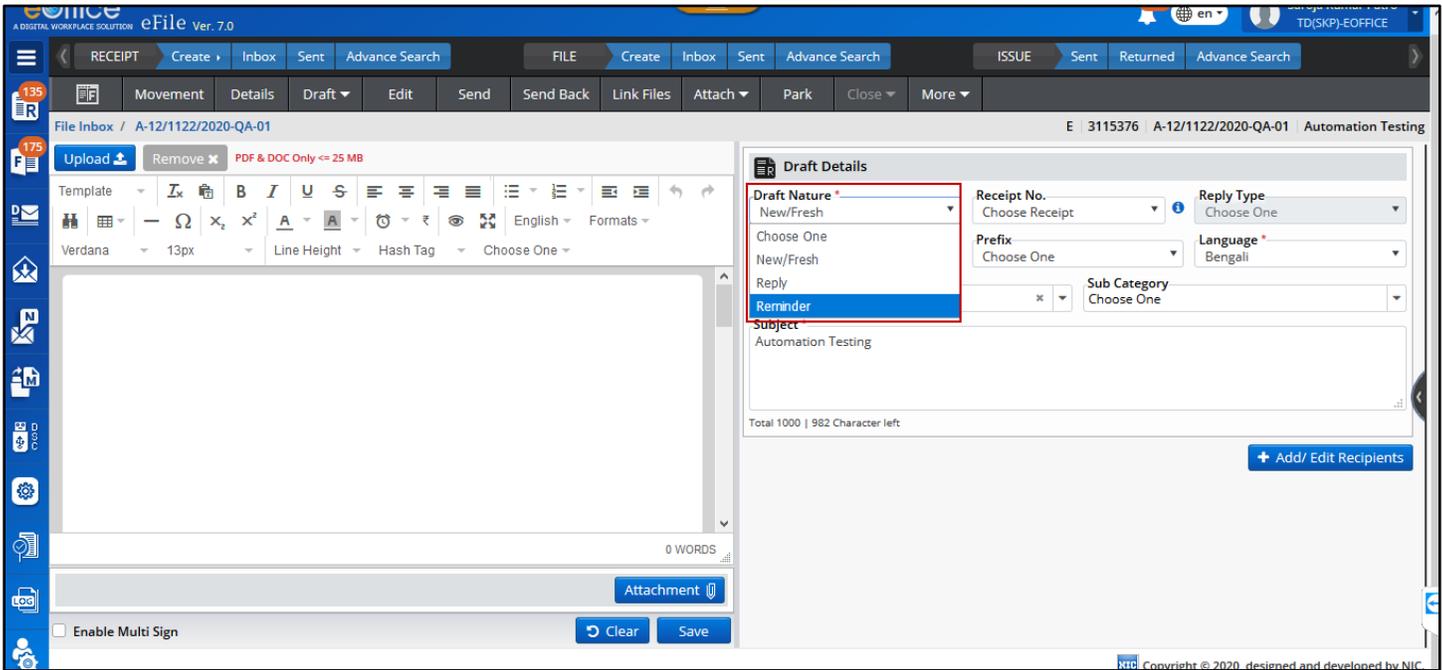


Figure 268

8. Select **Issue No.** if there are multiple Issues in ToC. (Reminder popup will open displaying list of all dispatches done on selected Issue)

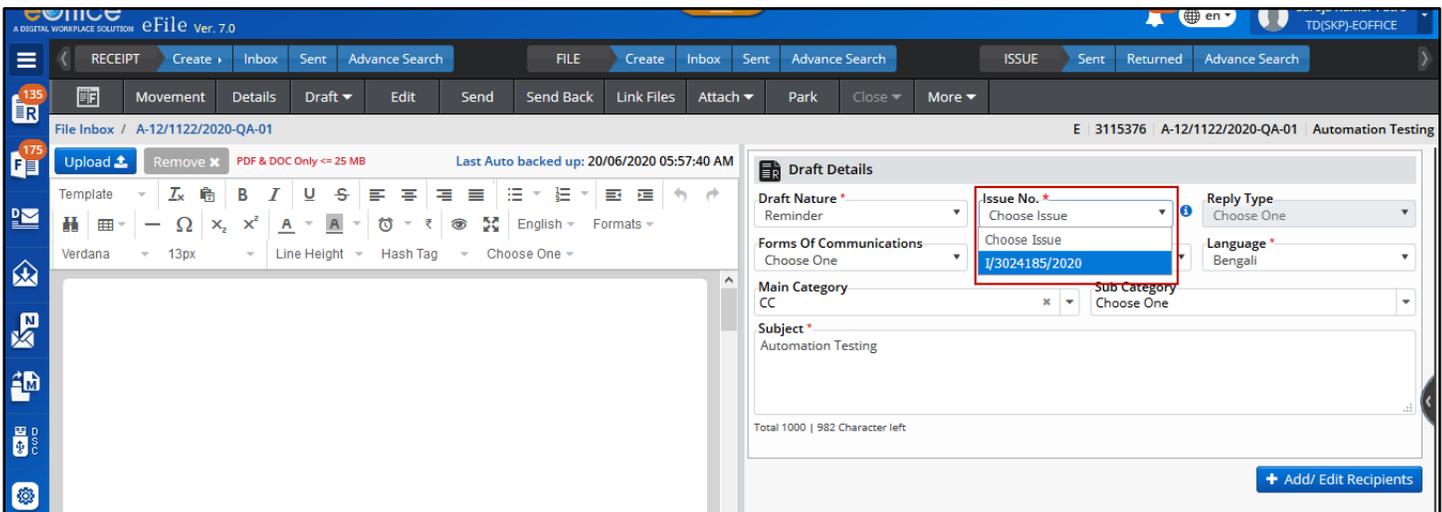


Figure 269

9. Click  icon to view list of dispatches against selected Issue.
10. Select **Dispatch No.** from popup to create reminder and click **Submit**.

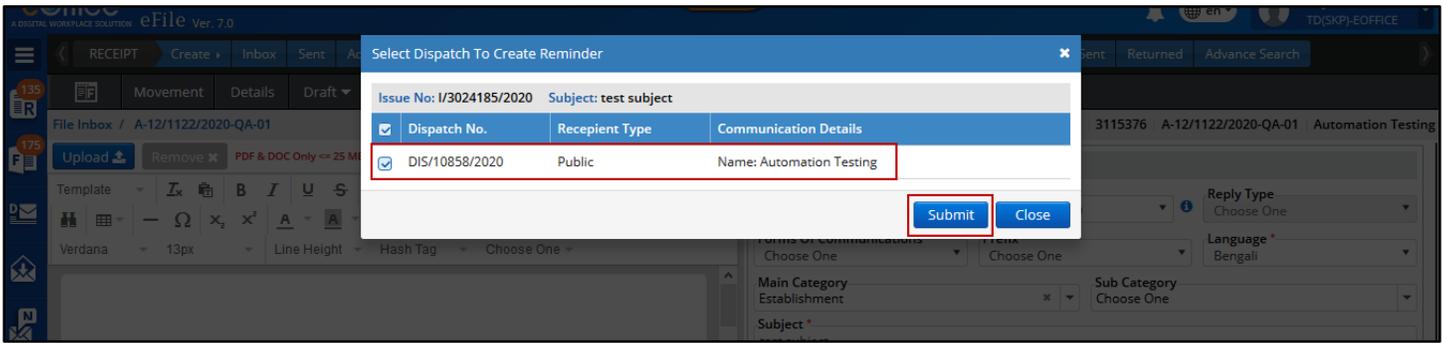


Figure 270

Note:

- **Recipient details, Main Category, Sub Category and Subject** of selected receipt are auto fetched in respective metadata fields.

11. Click **Save** to Save the draft and generate unique draft number.

Note:

- After saving Draft, a draft number will be generated for the draft and its state will be displayed as DFA with draft version as 1.
- Download Icon will be displayed if DFA is created by uploading Word document.
- Saved (Created) DFA will be in non-editable mode.
- Draft content (either typed or copied and pasted from word document in editor, Draft Details and Recipient Details get Auto Backed up if not saved by user. (In this case, Draft no. should not be generated)
- If Text editor is blank it will not be auto backed up or saved.
- Last Auto Backed up date and time (dd/mm/yyyy hh:mm AM/PM) will be updated in Draft Action Header after getting Auto Backed up.
- Clicking on Create new draft in a file having Auto Backed up Draft should open Auto Backed up content, which should be further edited or cleared using **Clear** action button.
- Created DFA can be viewed in Draft List (along with details as Draft No., Subject, Last Updated On, Status, Approved By and version details etc.) on right panel of File inner page.
- **Edit** and **Approve** Action button will be displayed for the saved draft.
- Legend will be provided in File Inner page/Inbox list page to indicate created draft.