Add Yellow Noting

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

STEPS TO FOLLOW:

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

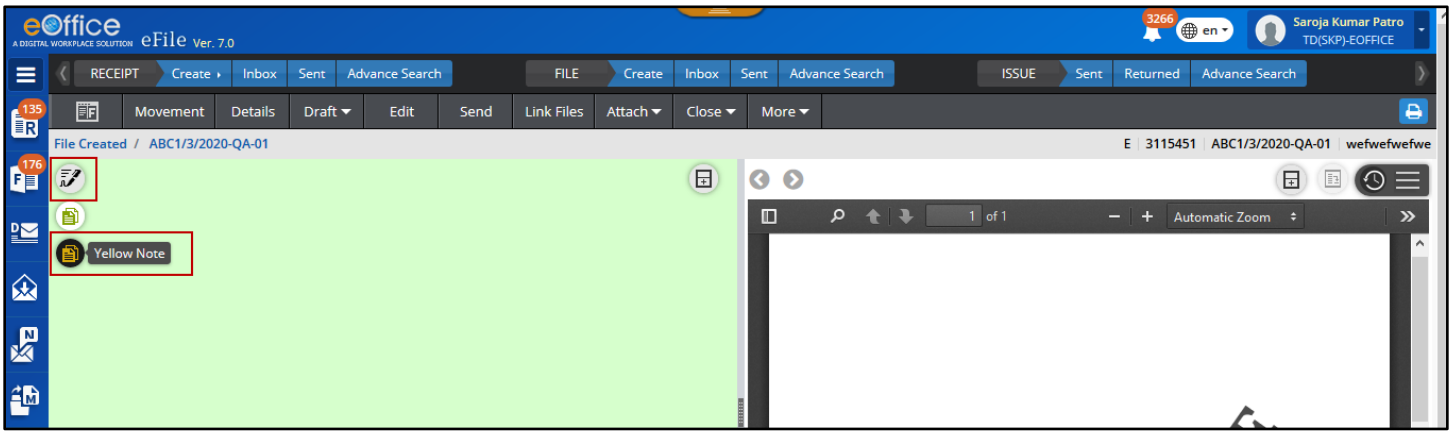

Figure 203

Note:

- User will be able to select Standard/ User defined Quick noting (English, Hindi, Other language) by Clinking 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 Yellow 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).

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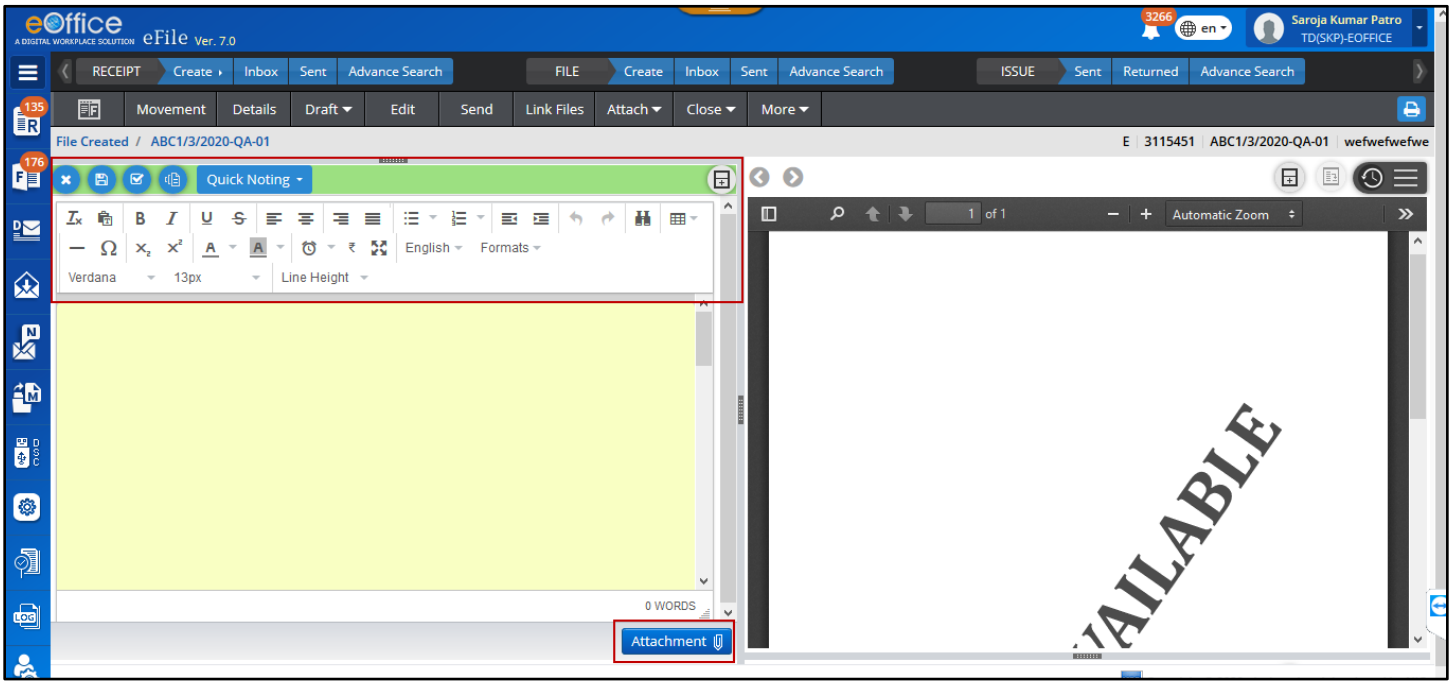

Figure 204

Note:

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

3. Click Attachment icon to attach document (PDF, DOCX, DOC, ODT, OPENDOC, XLS, XLSX, PPT, PPTX, PPSX format) if required(**Figure 204**).

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 (**Figure 204**).

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.
- Version of Yellow Note will be created once Saved/ Auto Saved.
- Color of Note Action Header should be changed for unsaved (Red) and Saved (Green) note.
- Option of **Confirming** Yellow Note and Viewing Yellow Note **Version** should be available for saved yellow note.
- Legends will be displayed in File Inbox/Inbox Folder/Created/Parked list to indicate file having saved yellow note.

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Edit Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list. (Saved Yellow Note is displayed along with its version list)
2. Click **Edit** Icon Note Action Header.

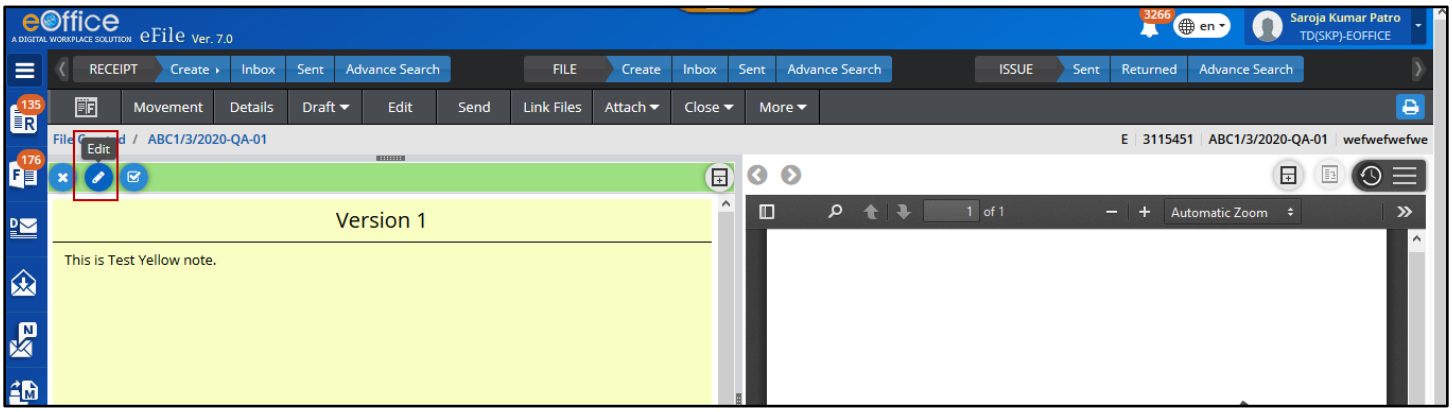

Figure 205

3. 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.
4. **Attach** or **Remove** attached document.
5. Click **Save** icon to update the noting or **Confirm** Icon to convert it into Green Note.

Note:

- New version will be created only if the previous version available in the file is not created by the same user.

Confirm Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list.
2. Click **Confirm** icon on Note Action Header.

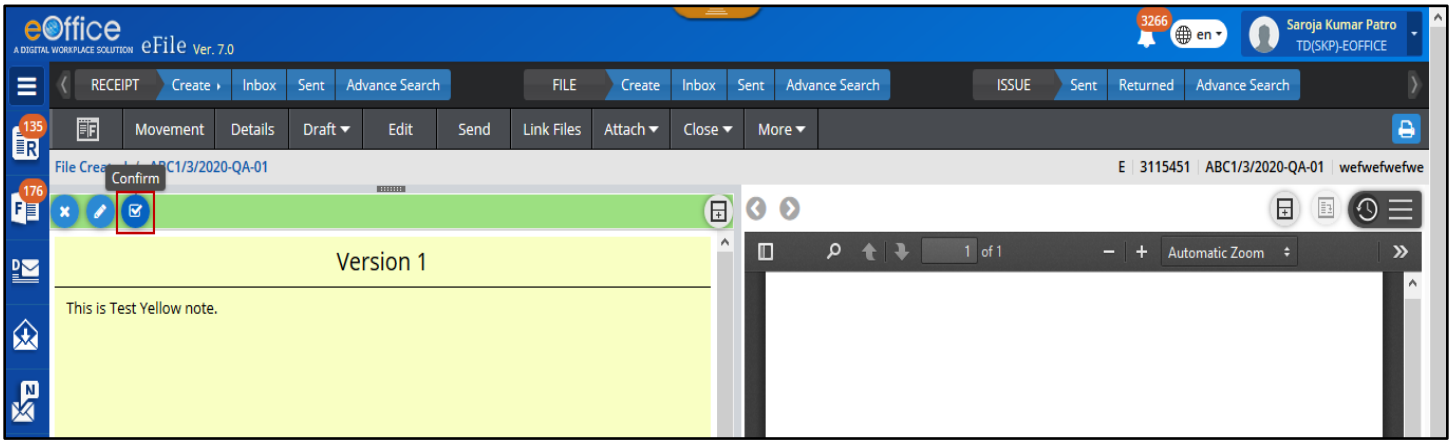

Figure 206

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3. Click **OK** in 'Confirm Yellow Note' pop up.

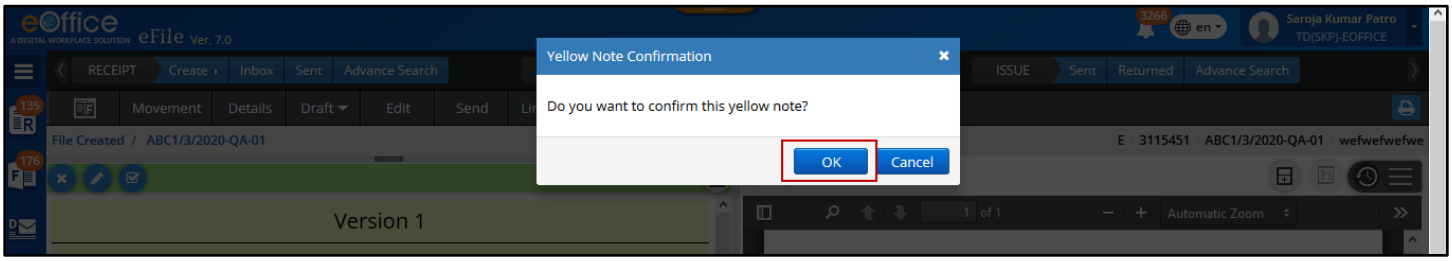

Figure 207

Note:

- Confirmed version of Yellow noting content should be converted to Green noting and displayed in web editor in editable form. (Yellow note versions shall no more be available).
- Option of **Save**, **Discard** and upload **Attachment** should be displayed for Green Note in web editor.

Discard Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list.
2. Click **Discard** icon on Note Action Header or **Discard** icon available in version list page of yellow note.

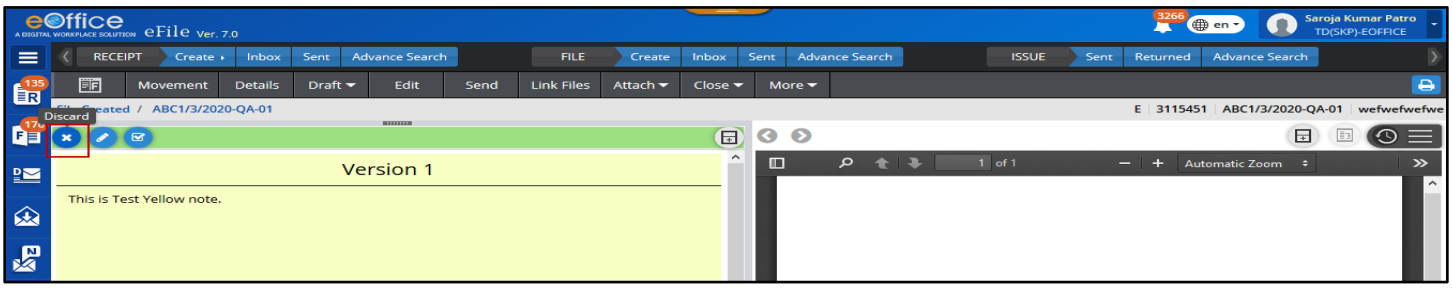

Figure 208

3. Click OK to Confirm deletion of noting in alert popup. On confirmation, Yellow note will be discarded and blank text editor is displayed with option to Add Note.

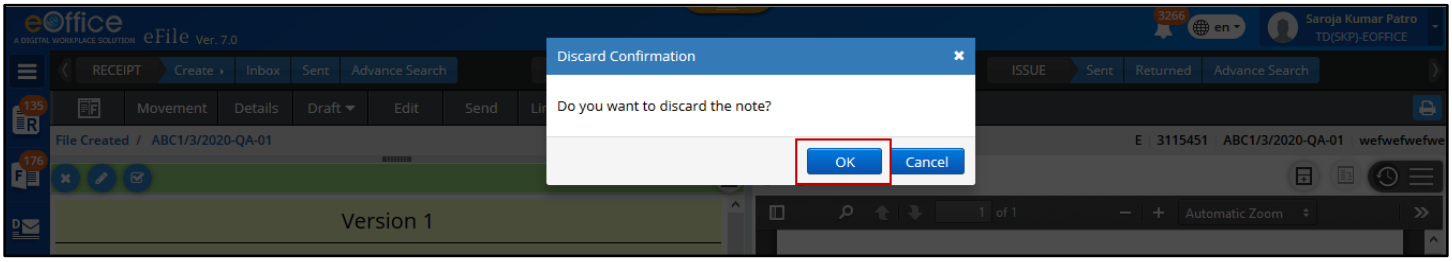

Figure 209

Note:

- **Discard** icon will be available for self-created version in version list page of yellow 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.

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View version of Yellow Note

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list. (*By Default, yellow note is displayed along with all its versions*).

2. While working on Yellow Note editor page, Click **Version** icon on Note Action Header to view all its versions.

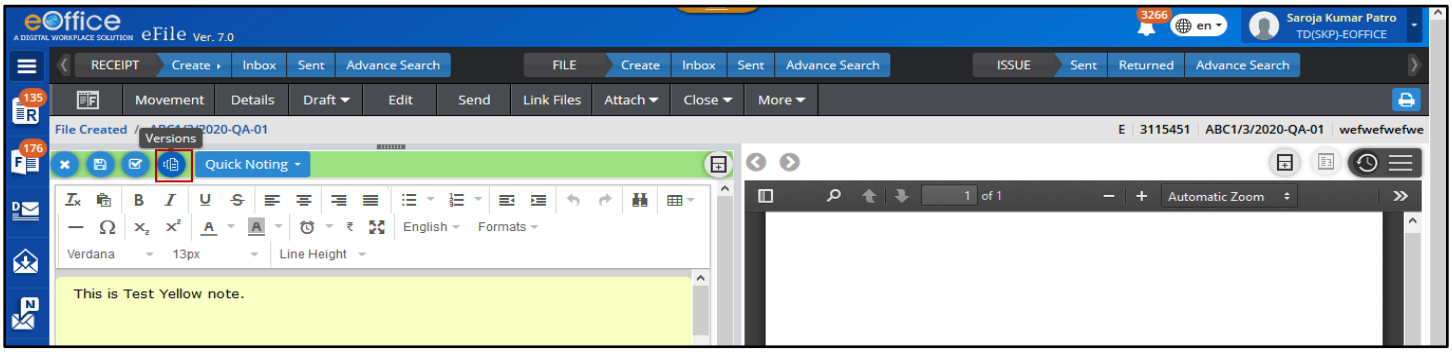

Figure 210

Note:

- New version will be created only if the previous version available in the file is not created by the same user.
- In case, a version is created by User 1 and file is send to User 2 but User 2 did not make any changes in the yellow note, and sent the file back to User 1. In this case, if User 1 edits the previously created latest version, no new version will be created.
- In case User 1 edits any other version except the previously created latest version, all the changes will be reflected in the previously create latest version by him.

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