

# Online Memo System



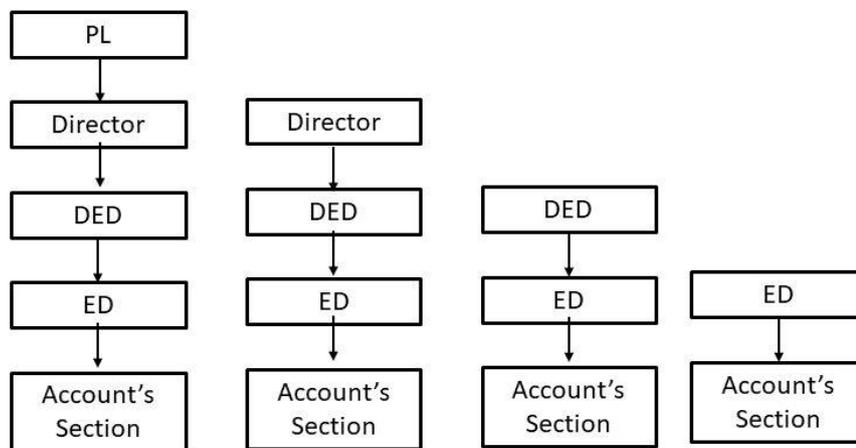
**User Manual**

**Dhaka**

## Overview of the system

CEGIS has developed a web-based Online memo system for automating the collection, validation, and approval of departmental memos. Which keeps track of all the financial activity online and systematically manages them.

Whenever a memo is submitted in the system it follows the following hierarchy (Figure: 1).



**Figure: 1**

Whenever a **Project Leader** sends a request, it is automatically forwarded to the **Director** for approval. After that, it is sent consecutively to **Deputy Executive Director**, and **Executive Director** for approval. After been approved in all the above stages finally, the memo is sent to the **Accounts Section** for further processing.

In the same way, if the **Director** submits a request, it is sent to **Deputy Executive Director** then to **Executive Director** for approval, after receiving the approval, it is sent to **Accounts Section** for farther processing.

So, the above steps are followed again and again according to the hierarchical concept following the above diagram (Figure: 1).

You can go to the Online memo system via <https://www.cegisbd.com/memo> which will take you to the following page (Figure: 2).



Sign in [Forgot password?](#)

Initial

Password

Not a member yet? [Register Now](#) (\*)

**Figure: 2**

Here you can see the **Login** and **Register** link in the top-right. If you are entering for the first time you have to complete the registration.

## Section-1 Registration Process

**To complete the registration please follow the following processes:**

1. First, click on the '**Register**' link on the top-right (Figure: 2).
2. You will be redirected to the Registration Page.

Now you can see the following page on your screen (Figure: 3).

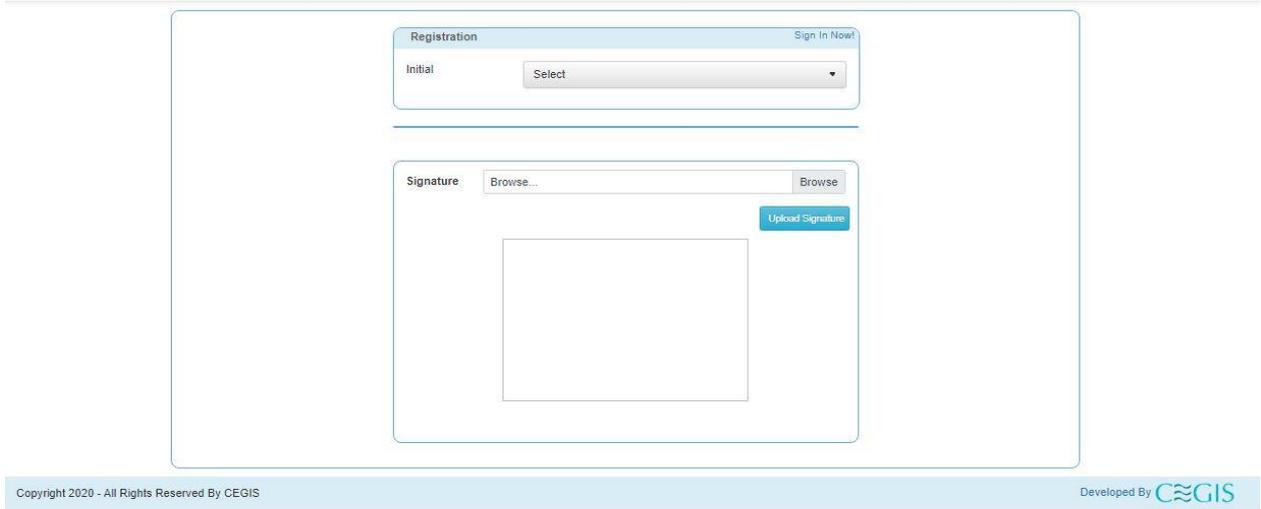


Figure: 3

3. Select the **initial** from the dropdown menu which is provided by **CEGIS Authority**. If you are a user registered already you will a message like below (Figure: 4).



Figure: 4

In case if you are not registered you will message like “**You are not yet a registered user. Please register**” (Figure: 5) in the browser.

The screenshot shows a registration form titled "Registration" with a "Sign In Now!" link in the top right. The form fields are: Initial (dropdown menu with "RHJ"), Name (text box with "Muhammad Rajib Hasan"), Email (text box with "mrajib@cegisbd.com"), Phone No (text box with "null"), Password (text box), and Confirm password (text box). A blue "Register" button is at the bottom right. A green message box below the form says "You are not yet a registered user. Please register." A green bar at the bottom of the window contains the text "Signature Exist".

**Figure: 5**

4. Fill up the incomplete information in case it doesn't exist (Figure: 6).

The screenshot shows the same registration form as Figure 5, but with the "Phone No" field filled with "01234567899" and the "Password" and "Confirm password" fields filled with "..." (masked text). The "Register" button is still present. The green message box and the "Signature Exist" bar at the bottom remain the same.

**Figure: 6**

5. Give a password and confirm the password (Figure: 6).

6. Click the **Register** button and the following window will popup (Figure: 6).

The image shows two parts of a web interface. The top part is a registration form titled "Registration" with a "Sign In Now!" link. It contains fields for "Initial" (with a dropdown menu showing "RHJ"), "Name" (with the text "You are a registered user. Please login." below it), "Email" (with the text "mrajib@cegisbd.com"), and "Phone No" (with the text "null"). The bottom part is a signature upload section titled "Signature" with a text input field containing "sig1.png". To the right of this field are two buttons: "Browse" and "Upload Signature". A red rectangular box highlights both the "Browse" and "Upload Signature" buttons.

**Figure: 7**

7. Browse your signature by clicking the **Browse** button (Figure: 7).
8. Upload your signature from your pc/device by clicking the **Upload Signature** button (Figure: 7).

If you are already registered to **Online Memo System** or registered successfully, to **Login**, follow the following instructions.

## Section-2 Logging in the System

### CEGIS Online Memo System

Sign In: [Forgot password?](#)

Initial  Enter User Initial

Password  Enter User Password

Not a member yet? [Register Now!](#)

**Figure: 8**

1. Type your Initial given by CEGIS Authority in the '**Initial**' textbox (Figure: 8).
2. Give your password in the '**Password**' text box (Figure: 8).
3. Click the '**Login**' button (Figure: 8).

From here you will be redirected to a new page (Figure: 9).

Create Memo

Dashboard Create Memo

CEGIS Online Memo System Rajib Bhowmik (RBA)

To: Malik Fida A Khan, Executive Director, CEGIS Project Code: Select

Recommendation: Deputy Executive Director, CEGIS

Through:

Through PL:

From: Rajib Bhowmik, Database, ICT and System Management Division, CEGIS

Date: mm/dd/yyyy

Subject:

Sir,

File Edit View Format

Paragraph B I

▲ This domain is not registered with Tiny Cloud. Please review your approved domains. X

POWERED BY TINY

Add Item (If you have any tabular item)

Submit

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**Figure: 9**

After Logging in your profile, you can create a Memorandum or See your submitted Memorandum in the Dashboard (Figure: 9).

## Section-3 Creating Memorandum

To create a Memorandum, follow the below instructions: -

1. Pick a **Project Code** from the dropdown menu at the right-top bar.
2. Pick a **Date** using from the Date picker.
3. Fill the **Subject** field in the form.
4. Fill form body with the message you would like to send.
5. Click **Add Item** if any tabular item is needed to be attached.
6. Press the **Submit** button to submit the request.

The screenshot shows a web form for creating a memorandum. The form includes the following fields and elements:

- To:** Malik Fida A Khan, Executive Director, CEGIS
- Recommendation:** Deputy Executive Director, CEGIS
- Through:** Abul Kashem Md. Hasan, Database, ICT and System Management Division, CEGIS
- From:** K.H. Razimul Karim, Database, ICT and System Management Division, CEGIS
- Project Code :** WRP014 (dropdown menu)
- Date Picker:** 06/28/2020
- Subject:** Request for an approval of advance in developer registration in Google Play Console to publish Android Apps.
- Memo Body:** I have the honor to inform you that under the Study on Online Processing and Tracking of Water Resources Project Clearance and No Objection Certificates for Groundwater Abstraction (WRP015), We are developing an effective application and to further development of various and upcoming projects need to publish mobile apps from Google Play Console for android phones to facilitate mobile information
- Add Item:** (If you have any tabular item)
- Table:**

Serial	Item	Unit Price	Quantity	Amount		
1	Registration Fee in Google	25	1	25	Delete	Add Row
- Submit:** Submit button

Add Item

Figure: 10

After clicking submit button the following image will be visible (Figure: 11)



Figure: 11

**Note:** Whenever a user submits a request instantly an email is sent to that user confirming his request is submitted and an instant email is sent to the User above him/her.

After submitting the request depending on the user who has submitted the request will appear into the dashboard to the users above requester according to hierarchy organogram (Figure: 1).

## Section-4 View the Dashboard

If the user clicks the **Dashboard** (Figure: 9) then he/she will be redirected to the Dashboard of that user looks like below (Figure: 12).

Selecting Division                      Selecting status                      Selecting Date

-- Select Division --                      -- Select Status --                      Oct 7, 2020 - Nov 5, 2020

Show  entries                      Search:

Memo Date	Requester	Project Name	Division	Approval Status	
4 November, 2020, Wednesday	Md. Anisur Rahman	System Support and Maintenance of Microfinance Information Database Management System(MFI-DBMS)	Database, ICT and System Management	Pending for Director's Recommendation	<a href="#">Preview</a>
5 November, 2020, Thursday	Md. Anisur Rahman	Digital CEGIS	Database, ICT and System Management	Pending for Director's Recommendation	<a href="#">Preview</a>

Showing 1 to 2 of 2 entries                      Previous  Next

Preview

Figure: 12

From here the user can preview all the requests he/she submitted with the status of the request from the dropdown menu by **selecting the status, division and date range**. So that he/she might be confirmed at the pending status for the approval. Here he/she can select **five types of status**.

- Pending for Director’s Approval
- Pending for DED’s Approval
- Pending for ED’s Approval
- Already Approved
- Pending for Procurement Committee's Recommendation

(e.g.: If he/she selects **Pending for Director’s Approval** from the dropdown he will see the request which is not approved by the **Director**.)

## Section-5 Preview the Submitted Memo

-- Select Division --      -- Select Status --      Oct 7, 2020 - Nov 5, 2020

Show  entries      Search:

Memo Date	Requester	Project Name	Division	Approval Status	
4 November, 2020, Wednesday	Md. Anisur Rahman	System Support and Maintenance of Microfinance Information Database Management System(MFI-DBMS)	Database, ICT and System Management	Pending for Director's Recommendation	<a href="#">Preview</a>
5 November, 2020, Thursday	Md. Anisur Rahman	Digital CEGIS	Database, ICT and System Management	Pending for Director's Recommendation	<a href="#">Preview</a>

Showing 1 to 2 of 2 entries      **Preview**      Previous  Next

**Figure: 13**

If the **Preview** link from the above picture (Figure: 13) is clicked then a page like below (Figure: 14) will be rendered to the screen.

Status: Pending for Director's Approval

1 of 1

Zoom in/out

CEGIS

**Memorandum**

Date:23/07/2020

**To:** Malik Fida A Khan  
Executive Director, CEGIS

**Recommendation:** Deputy Executive Director, CEGIS

**Through:** Abul Kashem Md. Hasan  
Chief Specialist (Director), Database,  
ICT and System Management, Division  
For

**Through** Md. Anisur Rahman

**From** Project Leader , UDB003  
Rajib Bhowmik  
Junior Specialist, Database, ICT and  
System Management, Division

**Subject:** test mail

Figure: 14

Form the above page (Figure: 14), the layout can be zoomed in or out by clicking + or – icon on the top right corner and more importantly from here the user can also go to the **Edit section** by clicking the **Edit** button (the Edit button is only available for **Project Leader, Director, DED, ED** only).

## Section-6 Editing the Submitted Memo

**Note: The section below is applicable only for the user who is either Project Leader Director, Deputy Executive Director, or the Executive Director.**

After clicking the **Edit** button from the preview page (Figure: 14), the following page (Figure: 15) will come up.

The screenshot shows a web-based memo creation form. The header section includes fields for 'To:', 'Recommendation:', 'Through:', 'Through:', 'From:', 'Date:', 'Project Code:', and 'Subject:'. The 'Date:' field contains '07/23/2020' and the 'Project Code:' field contains 'UDB003'. The 'Subject:' field contains 'test mail'. Below the header is a rich text editor with a toolbar and the text 'this is test mail'. At the bottom, there is a table with columns 'Serial', 'Item', 'Unit Price (BDT)', 'Quantity', and 'Amount (BDT)'. The table contains one row with '1', 'testitem', '2050', '2', and '4100'. A 'Total' row shows '4100.00'. There are 'Add Row', 'Delete', 'Preview', and 'Save' buttons.

Serial	Item	Unit Price (BDT)	Quantity	Amount (BDT)
1	testitem	2050	2	4100
Total				4100.00

**Figure: 15**

The page (Figure: 15) looks like a normal **Create Memo** page, but the signed-in user here is (**Project Leader, Director, Deputy Executive Director, Executive Director**) who can edit the information of the submitted user. After editing the information, the user will click on the **Save** button to save the changes. From here (Figure: 15) he can also see the preview the current copy of the request by clicking the **Preview** button.

## Section-7 Recommend or Approve the Submitted Memo

**Director, Deputy Executive Director** reserves the right to recommend a memo. So, they will only see a preview page like below (Figure: 16) with the **Recommend** button. The **Executive Director** has the right to approve the memo.

**Note:** User logged in as the **Executive Director** will see only **Approve** button not **Recommend** Button.

Status: Pending for Director's Approval

Recommend

Edit

1 of 1

CEGIS

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**Memorandum** Date: 23/07/2020

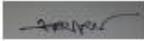
**To:** Malik Fida A Khan  
Executive Director, CEGIS

**Recommendation:** Deputy Executive Director, CEGIS

**Through:** Abul Kashem Md. Hasan  
Chief Specialist (Director), Database, ICT and System Management, Division For

**Through:** Md. Anisur Rahman

**From:** Project Leader, UDB003  
Rajib Bhowmik  
Junior Specialist, Database, ICT and System Management, Division



**Figure: 16**

After clicking the **Recommend** link (Figure: 16) finally, the current memo will be forwarded to the upper person in the hierarchy chain.

Clicking the **Recommend** button will take to a pop-up window like the following image (Figure: 17).

Recommend Memo ×

Are you sure you want to recommend Memo?

---

[Recommend](#)

**Figure: 17**

Status: Pending for DED's Approval

Recommend Edit

1 of 1

**CEGIS**

**Memorandum**

Date: 23/07/2020

**To:** Malik Fida A Khan  
Executive Director, CEGIS

**Recommendation:** Deputy Executive Director, CEGIS

**Through:** Abul Kashem Md. Hasan  
Chief Specialist (Director), Database, ICT and System Management, Division

**Through:** Md. Anisur Rahman  
Project Leader, UDB003

**From:** Rajib Bhowmik  
Junior Specialist, Database, ICT and System Management, Division

Figure: 18

Note: User logged in as the **Executive Director** will see only the **Approve** button not **Recommend** Button (Figure: 19). After clicking the **Approve** button the request will be sent to the **Accounting Section**.

Status: Pending for ED's Approval

Approve Edit

1 of 1

**CEGIS**

**Memorandum**

Date: 23/07/2020

**To:** Malik Fida A Khan  
Executive Director, CEGIS

**Recommendation:** Deputy Executive Director, CEGIS

**Through:** Abul Kashem Md. Hasan  
Chief Specialist (Director), Database, ICT and System Management, Division

**Through:** Md. Anisur Rahman  
Project Leader, UDB003

**From:** Rajib Bhowmik  
Junior Specialist, Database, ICT and System Management, Division

Figure: 19

Whenever the **Executive Director** clicks the **Approve** button (Figure: 19), a new page is displayed below (Figure: 20). At the same time, an email is sent to the Executive Director's email with **4-digit OTP**. If the **Executive Director** is unable to enter the OTP within 5 min, the approved action will not be completed and will not be forwarded to the **Account's** Section and a pop-up window will show a timeout message.



**Figure: 20**

**Note:** Only when Executive Director enters the OTP and clicks **Submit OTP and Approve** only after that the submitted request will go forward to Account's Section otherwise the request will not be approved.

## Section-8 Accounts Section

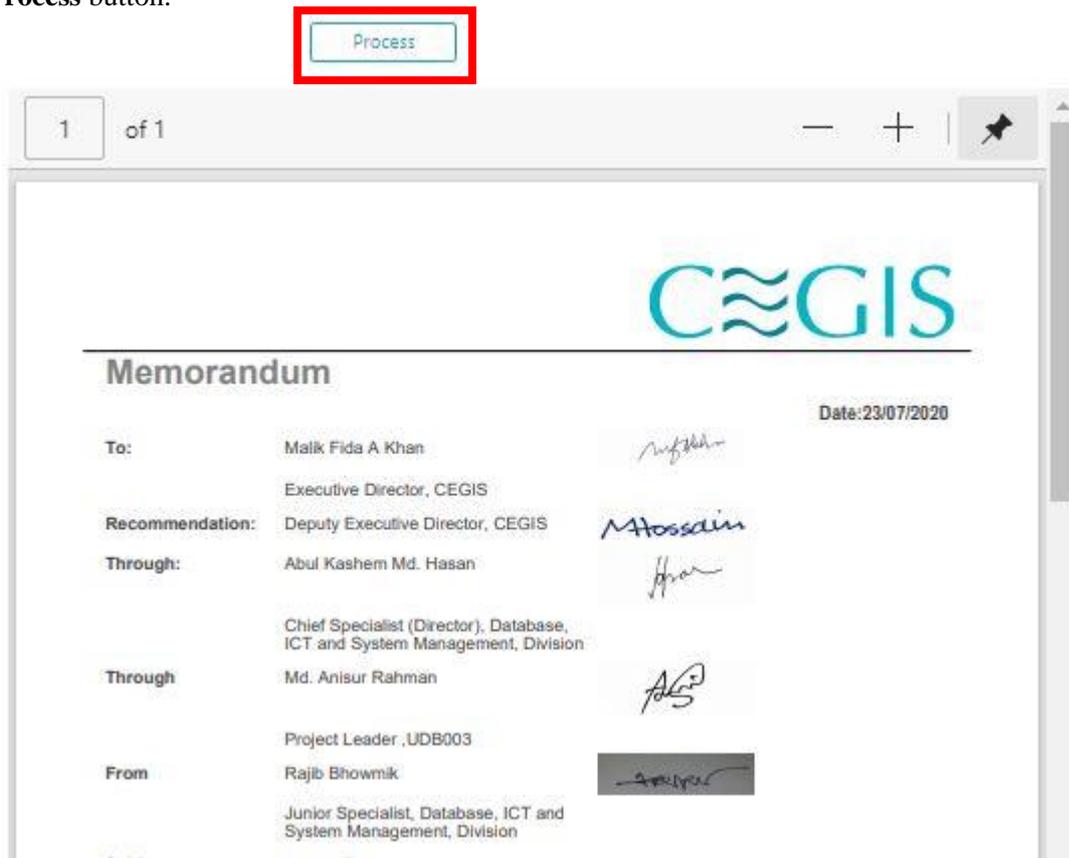
After getting approval from the **Executive Director**, the **Accounts section** will receive all the final copies of the memo which would look like below in **Dashboard** (Figure 21).s

Dashboard

Requester	Date	Approval Status	Processing Date	Processing Status	
Rajib Bhowmik	2020-07-23	Approved by ED		Not View	Preview
Md. Anisur Rahman	2020-07-20	Approved by ED	2020-07-20	Processed	Preview
Abul Kashem Md. Hasan	2020-07-20	Approved by ED	2020-07-21	Processed	Preview

**Figure: 21**

From here (Figure 22) the user of the accounts section can set the status of the memo by clicking the **Process** button.



**Figure: 22**

He/she can set any of the following statuses for the memo request according to the appropriate situation.

- View only
- Processed
- Not Processed

### ProcessAccounts

A screenshot of a web application interface showing a form titled 'ProcessAccounts'. The form contains a dropdown menu for 'Select Process Status' with three options: 'View Only', 'Processed', and 'Not Processed'. Below the dropdown is a blue button labeled 'Update Status'. The entire dropdown menu and button area is highlighted with a red rectangular box.

**Figure: 23**