



***User Manual for Approval Management System  
for GSFC University - Version -1.2***

## Revision Details

### GSFCU-Approval Management System-Manual

Sr. No	Version	Revision Date	Revision Details	Prepared by	Approved by
1	1.0	11/06/2019	First Release	Mr. Mital Naik [SM-IT]	Sh. Samir Bhatt, Director Administrator
2.	1.1	30/07/2019	Second release	Mr. Mital Naik [SM-IT]	Sh. Samir Bhatt, Director Administrator

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## 1. Introduction

**Purpose:** To facilitate the automation service for initiating and approving the approval process. The main purpose to facilitate this system is to reduce the usage of paper and to smoothen the process of approval.

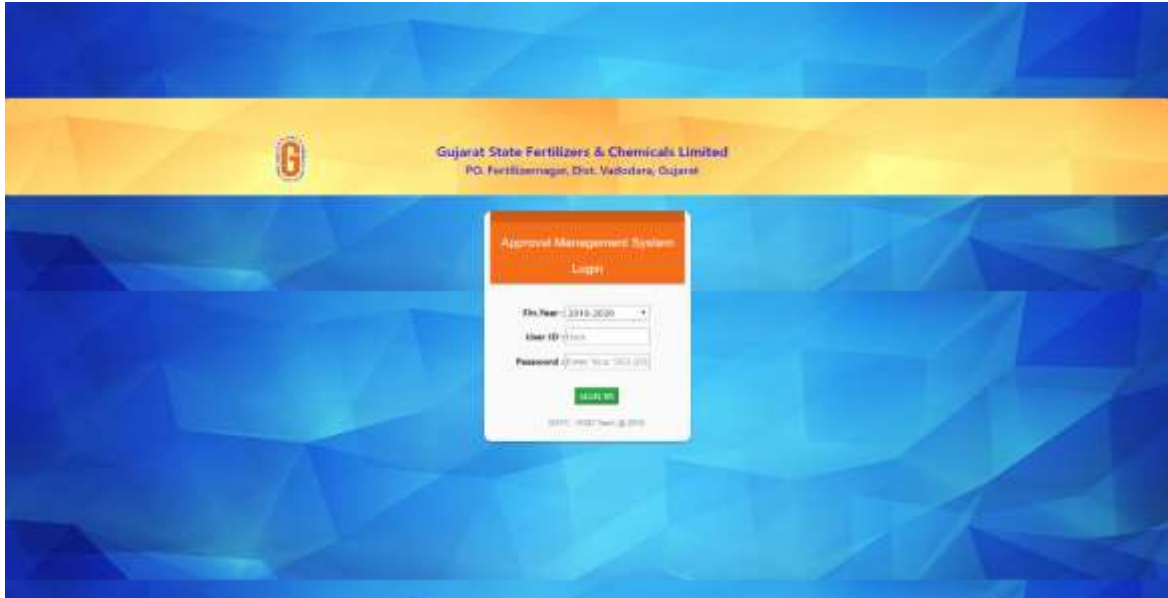
**The approval management System (AMS) can be accessed through the following URL:**

**Internet URL:** <http://mdms.gsfclimited.com/pcs/login>

**University's website (From Internet):** GSFC University Website -> E Governance -> Approval Management System (AMS)

## 2. Login Process

1. Go to GSFC Limited website [www.gsfcuni.edu.in](http://www.gsfcuni.edu.in).
2. Click on E-Governance and then click on Approval Management System.
3. Enter your User ID and Password and click on Sign-in.



1. After logging into the system.



### 3. Initiator Process

- 1) Please Click on Compose link at left Menu to Create New Proposal.
- 2) Select Proposal type and Subject.
- 3) Enter Subject Text (Max. 150 Char.) and Details (Initiator Comment)
- 4) Defined Proposal Path for Approval.
- 5) Generate Token.
- 6) Attach Documents.
- 7) After completing, you can Send Proposal to Next Processor, for this Please Click on Send Proposal Button at bottom of Page.
- 8) After Send Proposal you will be redirect to Main Page (Dashboard).
- 9) To track your Proposals, Please see left Menu where yours Pending Proposals are in Inbox, In-process Proposals are in Sent, display with its Count.
- 10) Please refer below Screen Shots for that.

- **Note:**

- ❖ One can attach his/her first main proposal document in format of **.DOC or .DOCX** up to Maximum of 4MB size (Earlier it supported up to 1MB Size).
- ❖ Red Colour indicates Pending Proposal, Blue Colour indicates Sent Proposal (In-Process).
- ❖ In order to change the proposal path or recall a sent proposal, user will have to click on Proposal Changes and make the necessary changes in the foresaid proposal.

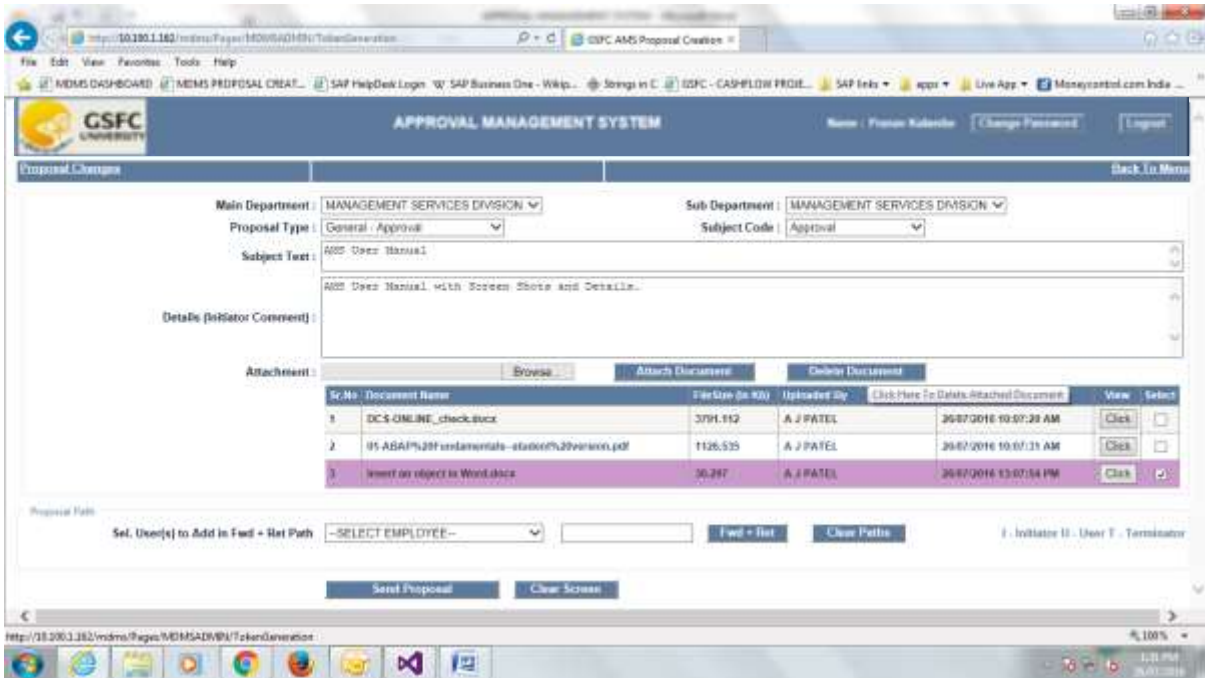
The screenshot displays the 'APPROVAL MANAGEMENT SYSTEM' interface for GSFC University. The page is titled 'GSFC AMS Proposal Creation'. The main form includes the following fields and controls:

- Main Department:** MANAGEMENT SERVICES DIVISION (dropdown)
- Sub Department:** MANAGEMENT SERVICES DIVISION (dropdown)
- Proposal Type:** General - Approval (dropdown)
- Subject Code:** Proposal (dropdown) with a 'Subject Help' button.
- Proposal Priority:** Normal (dropdown)
- Subject Text:** A large text area for entering the subject text.
- Details (Initiator Comment):** A text area for entering the initiator's comment.
- Proposal Path:** A section for defining the approval path, including a dropdown for 'Sel. User(s) to Add in Fwd + Ret Path' (currently set to '-SELECT EMPLOYEE-') and buttons for 'Add', 'Delete', 'Change', 'Fwd + Ret', and 'Clear Paths'.
- Buttons:** 'Generate Token' and 'Clear Screen' buttons are located at the bottom of the form.

A note below the 'Details' field states: "Note: You are Requested to Attach Requires Documents ONLY After Generating Token. Please Check Proposal Path before Generating Token for this Proposal."

- **Attach Documents:**

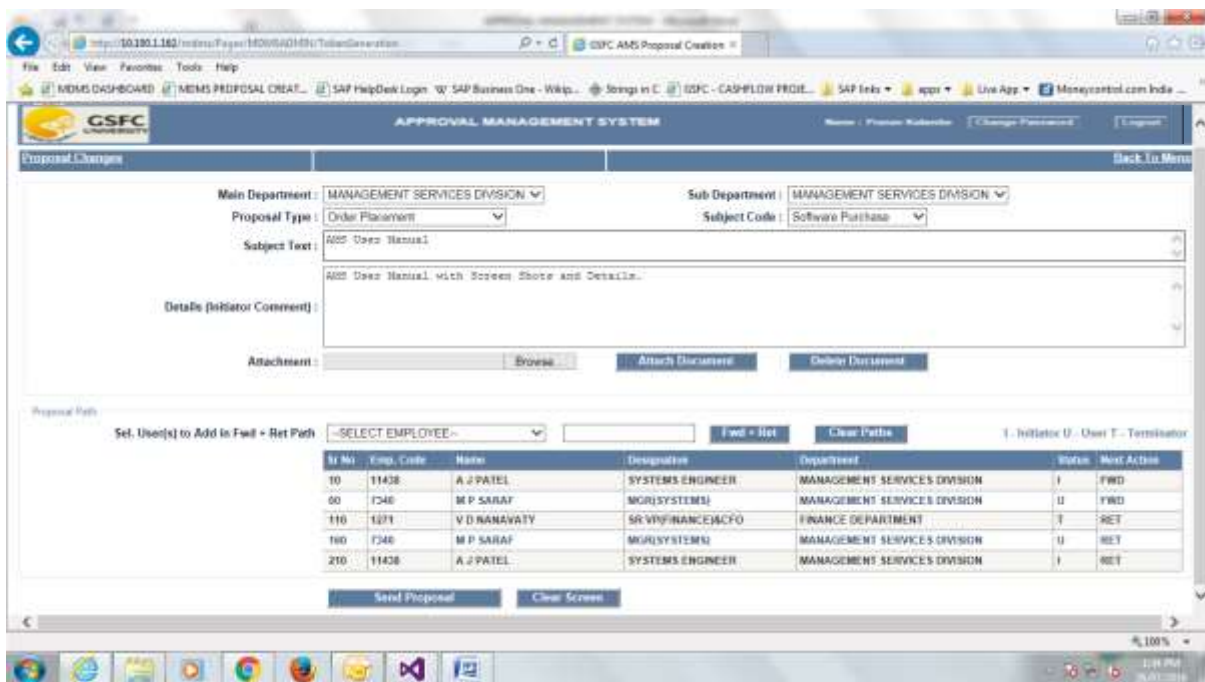
- 1) First attachment (Main Proposal Document) is only in .DOC, .DOCX format only.
- 2) Document attachment size is up to max. 4MB
- 3) Please browse document and then click Attach Document Button.
- 4) You can view your attachment in document list seen in below screen shot.
- 5) To delete document from list, Select document first (Check last column of list) then click on Delete Document Button.



- **Proposal Path:**

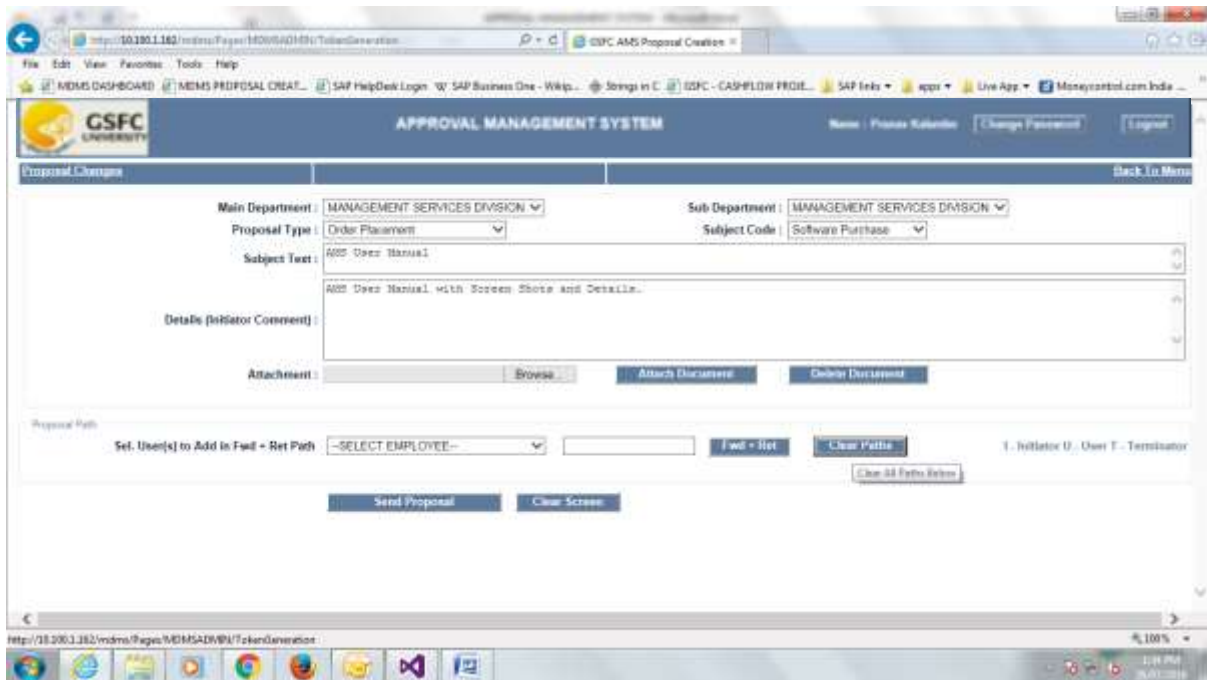
- 1) By default system show Proposal Path in case if you have created proposal in past for same proposal type.
- 2) If you want to change users in Proposal Path then first clear Proposal Path by clicking on Clear Path Button.
- 3) Select required users from list, selected users are copied in to textbox right side of User list.
- 4) Once you prepare users list for Proposal Path then click on Fwd + Ret button.
- 5) Your Proposal Path is created and you can see in list as per below screen shot.

- **By Default Proposal Path if exist:**





- Clear Proposal Path by Click on Clear Paths Button:

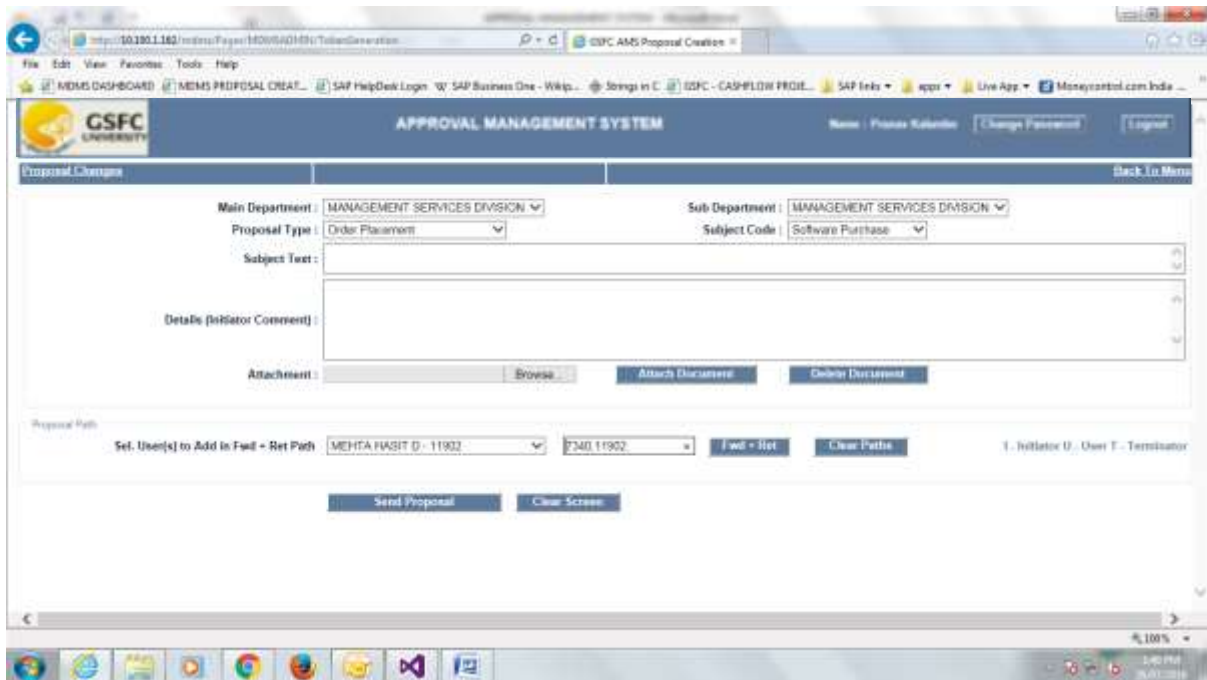


**Note:**

- ❖ If you know user id then you can also directly enter users in textbox right side of user list separated by comma (,) symbol and then click button Fwd + Ret. See below highlighted by yellow colour. Otherwise you can add user from user dropdown list.

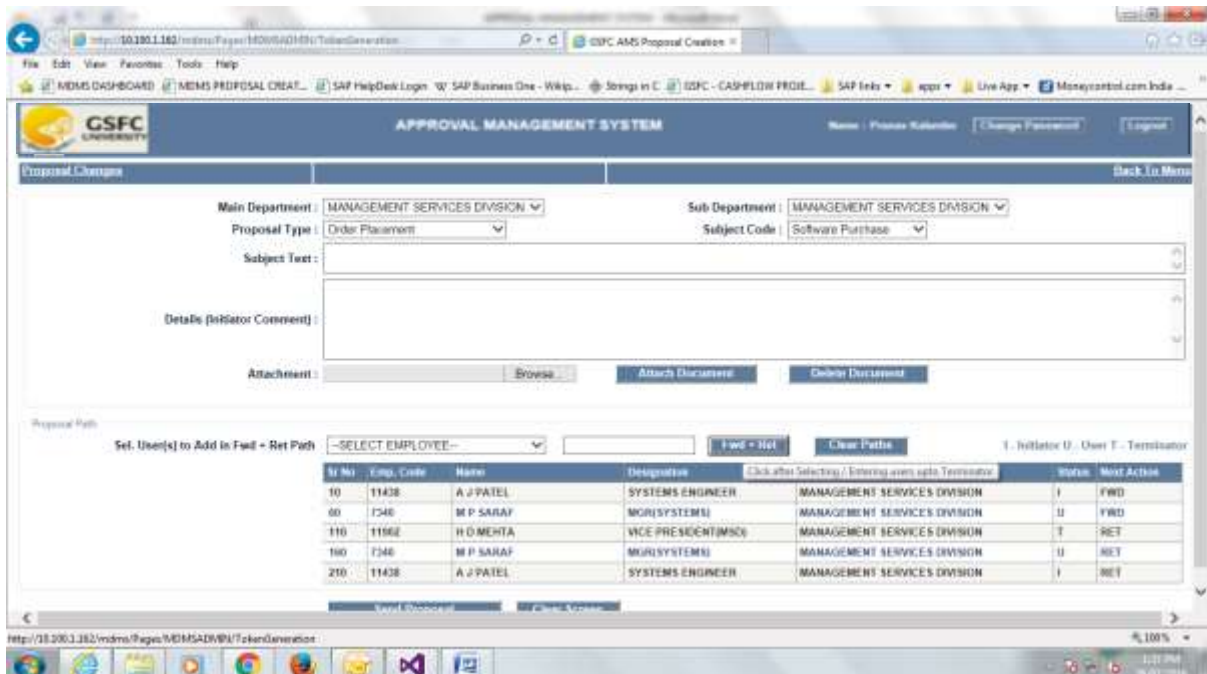


- Select Users from Dropdown list:



If you select wrong user from list then you can removed copied user from textbox by Backspace key up to comma symbol.

- Click on Fwd + Ret Button to create Proposal Path:



- After Sending Proposal it will be redirected to Dashboard Main Page:



- After sending the proposal, it can be viewed into the Sent option.



- **Send to Finance / Save:**

Once Proposal is approved and back to Initiator in return path then you can perform following action:

- **Send to Finance: (in case of FC required)**

Select user from list and click on Send to Finance Button.

- **Save: (for Non-FC)**

Click on save button if FC is not required.

Please refer below screen shot.



## 4. Approver Process

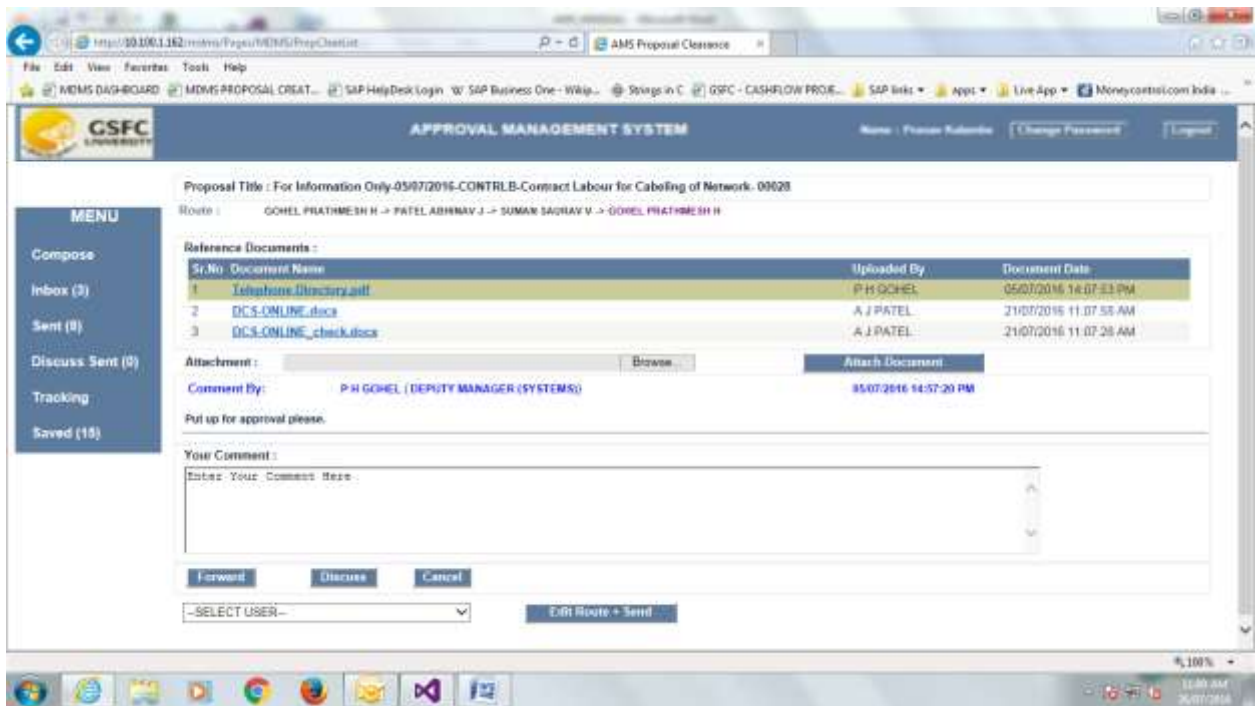
1. To clear the Proposal, Click on Proposal Subject link in Proposal List (3<sup>rd</sup> Column of Proposal List)



The screenshot shows the 'APPROVAL MANAGEMENT SYSTEM' dashboard. At the top, there are navigation tabs for 'All (3)', 'HR & Admin (0)', 'Purchase (0)', 'Marketing (0)', 'Tech. O & M (0)', and 'Others / Unit (3)'. A search bar is located on the right. Below the navigation, a table lists proposals with columns for Department, Last Processed Dt, Subject, Status, Current Handler, and Sender. The third row is highlighted, corresponding to the subject 'For Information Only-05/07/2016-CONTRLB-Contract Labour for Labeling of Network-00028'.

Department	Last Processed Dt	Subject	Status	Current Handler	Sender
MANAGEMENT SERVICES DIVISION	22/07/2016 12:39:38	<a href="#">Additional Budget Corporate limits matters test.12/07/2016</a>	DISCUSS-RCVD	M P SARAF	M P SARAF
	21/07/2016 14:25:04	<a href="#">Order Placement Software Purchase test forwrd-19/07/2016</a>	PENDING	A J PATEL	P H GOHEL
	21/07/2016 05:07:17	<a href="#">For Information Only-05/07/2016-CONTRLB-Contract Labour for Labeling of Network-00028</a>	PENDING	A J PATEL	S V SUMAN

2. To Clear Proposal Enter Your Comments and Proceed:

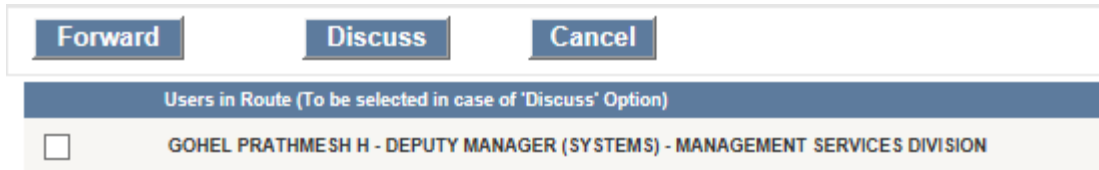


The screenshot shows the 'AMS Proposal Clearance' screen. The proposal title is 'For Information Only-05/07/2016-CONTRLB-Contract Labour for Labeling of Network-00028'. The route is 'GOHEL PRATHMESH H -> PATEL ABHINAV J -> SUMAN SAGNAV V -> GOHEL PRATHMESH H'. Under 'Reference Documents', there are three entries: 'Telephone Directory.pdf', 'DCS-ONLINE.docx', and 'DCS-ONLINE\_check.docx'. The 'Attachment' section shows 'Comment By: P H GOHEL ( DEPUTY MANAGER (SYSTEMS))' with a timestamp of '05/07/2016 14:57:20 PM'. Below this is a text area for 'Your Comment:' with the placeholder 'Enter Your Comment Here...'. At the bottom, there are buttons for 'Forward', 'Discuss', and 'Cancel', along with a dropdown menu for '-SELECT USER-' and a 'Edit Route + Send' button.

- **Actions:**

**Forward:** Proposal will be forward to next destination.

**Discuss:** To Send Proposal for Discussion to route (Proposal Path) users for that, please select user from list and click on Discuss button.



The screenshot shows a horizontal bar with three buttons: 'Forward', 'Discuss', and 'Cancel'. Below this bar is a table with a blue header row and one data row. The header row contains the text 'Users in Route (To be selected in case of 'Discuss' Option)'. The data row contains a checkbox and the text 'GOHEL PRATHMESH H - DEPUTY MANAGER (SYSTEMS) - MANAGEMENT SERVICES DIVISION'.

Users in Route (To be selected in case of 'Discuss' Option)	
<input type="checkbox"/>	GOHEL PRATHMESH H - DEPUTY MANAGER (SYSTEMS) - MANAGEMENT SERVICES DIVISION

**Edit Route + Send:** To Send Proposal for other users which are not in Proposal Path, in this case just select user from dropdown list and Click button Edit Route + Send.



The screenshot shows a dropdown menu with the text 'AMIN BALDEVBHAI C - MGR(SYSTEMS)' and a downward arrow. To the right of the dropdown is a button labeled 'Edit Route + Send'.

**Cancel:** Proposal will be cancelled and Sent Back to Previous Processor.

**Approve:** It will be visible only for Terminator (Last Processor of Proposal).



## 5. Do's and Don'ts

### Do's

1. Character count for "Subject line" for AMS proposal should be up to max.150 Character.
2. Character count for "Details/Comment" section should be up to max.4000 Character.
3. AMS must be used for approval of proposals only.
4. The first attachment to be uploaded for any proposal must be in ***".doc / .docx"*** document format (approval note). The same shall be displayed in a web document viewer on user's/approver's screen.
5. The initiator is responsible for designing the approval path [via proper channel as per hierarchy of individual].
6. Attachment size for any document for proposal shall be is up to 4MB [Max]
7. The initiator has to check and verify the main proposal document before floating the proposal. (same can be checked by clicking on view button in attached document list and should be in .doc or .docx format)
8. Edit Route + Send functionality in approval screen is to be used for sending proposal to other users which are not in proposal path.
9. Any proposal in which financial approval is required, should have a budgetary financial figures for estimation of proposal for management.
10. Proposal received back via approval channel should be save by initiator.

### Don'ts

1. AMS should not be used for general communication purpose with management.
2. File name of "Uploading document" should not be large in length and do not use any special character in file name.
3. Edit Route + Send functionality in approval screen should not be used to send proposal to users which are already existing in proposal path.
4. No AMS proposal should be send to President Sir directly from initiator.