

User Manual

Project: Marketing D&S Work Order Application

This guide is designed to help users navigate the Creative Work Order Application efficiently. It offers detailed, step-by-step instructions on how to register, submit requests, track progress, and collaborate with team members. Packed with helpful tips and insights on managing requests, this manual will assist users in optimizing their workflow and ensuring a seamless creative process. Whether you're a first-time requester or simply need a refresher, this guide will simplify your experience and help you achieve your project goals.

Users Involved in the Application:

1. **Requester**
2. **Vertical Heads**
3. **Team Members / Designers**
4. **Bin Manager**

This User Manual is specifically for the Requester:

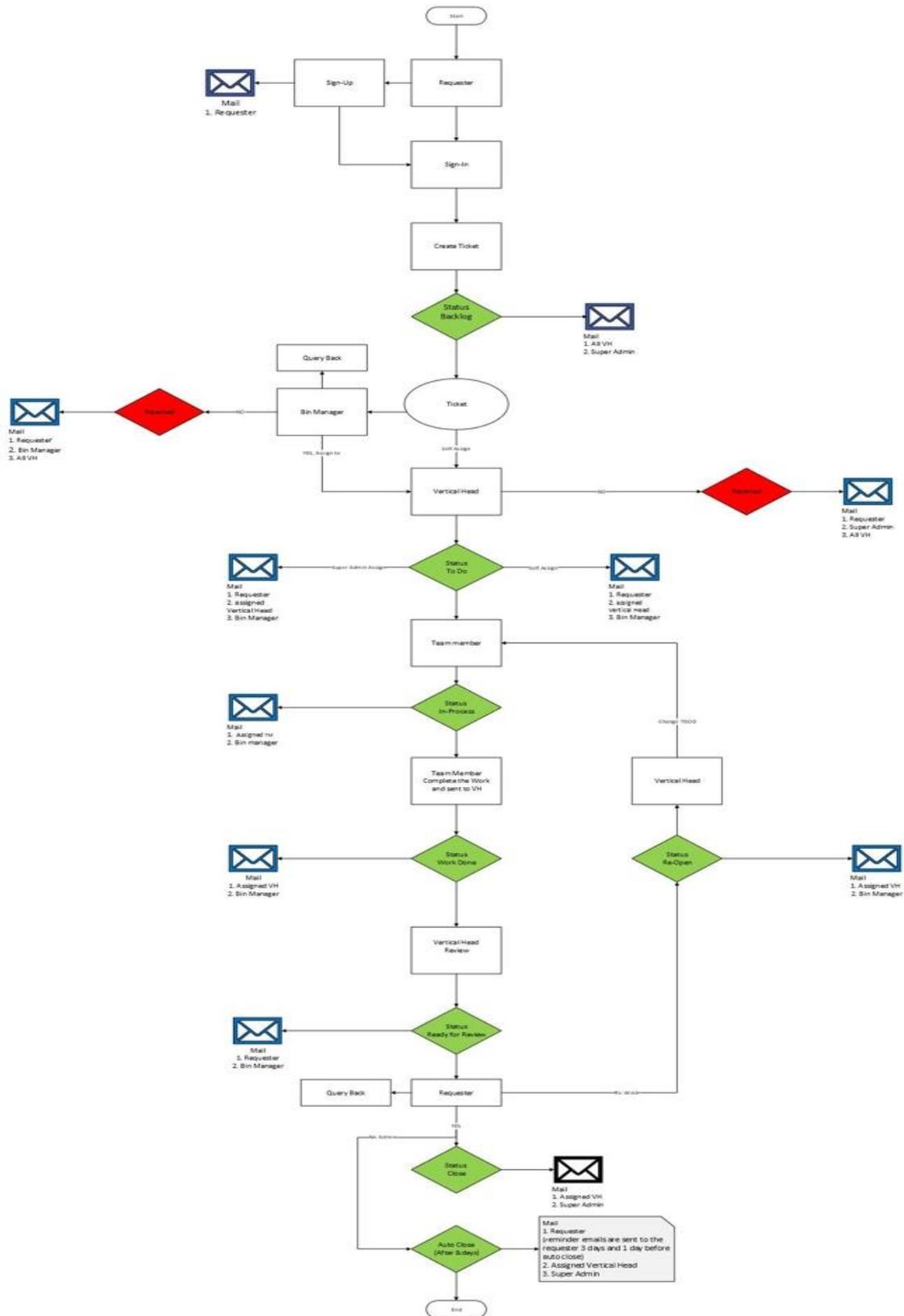
Roles and Responsibilities of the Requester:

1. **Sign Up**
2. **Sign In**
3. **Create a New Request**
4. **Review Creative Work Orders**
5. **Close a Request**
6. **Re-open a Request**
7. **Add Comments**
8. **Receive Notifications**

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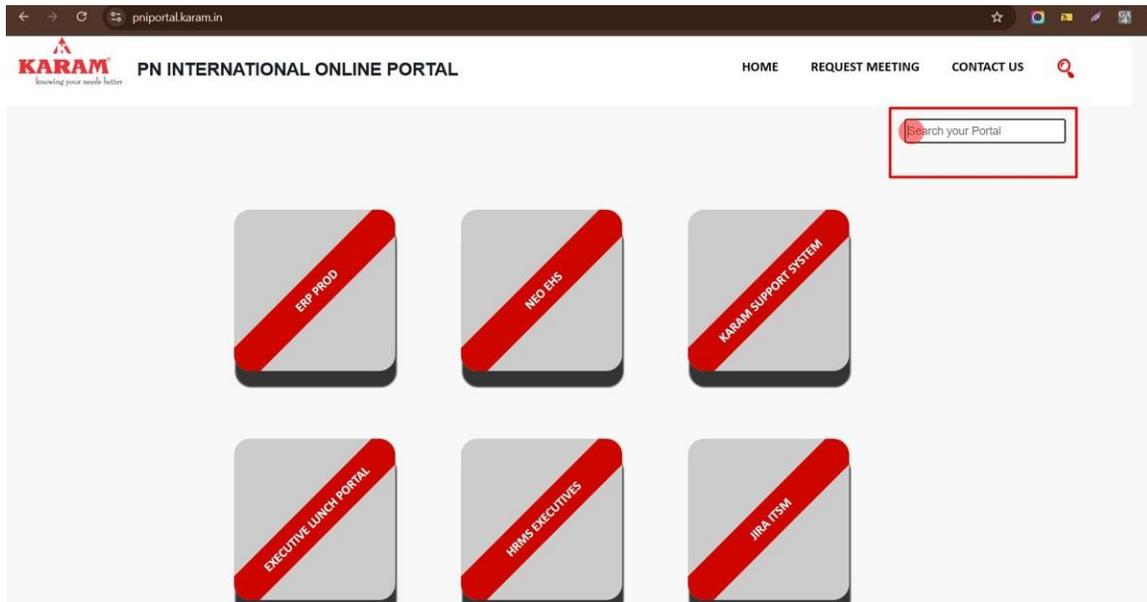
Work Order Management Workflow



Ways to Access the Application

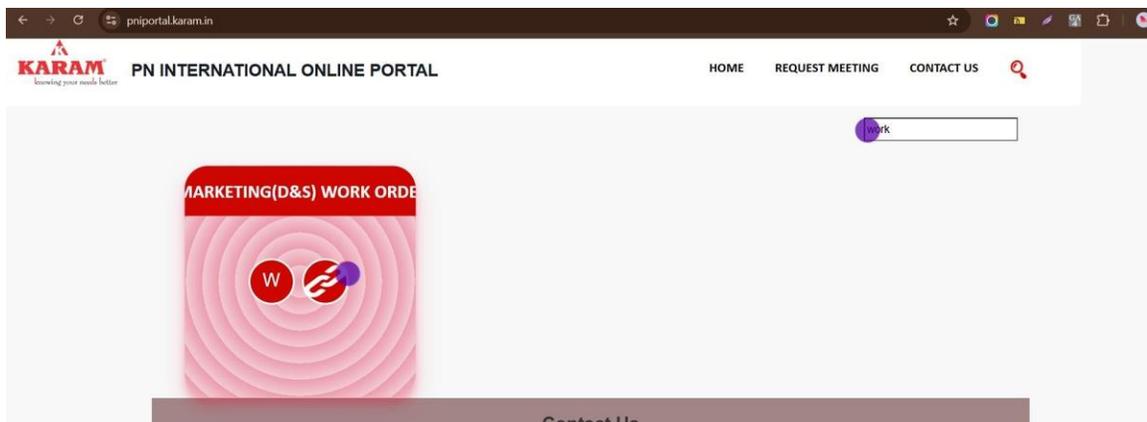
There are two ways to access the application:

1. Bookmark the URL in your browser. (<https://workorder.karamportals.com/login>)
2. Visit <https://pniportal.karam.in> and search for the Workorder application.



Follow these steps to reach the application window:

- i. Go to the <https://pniportal.karam.in/>

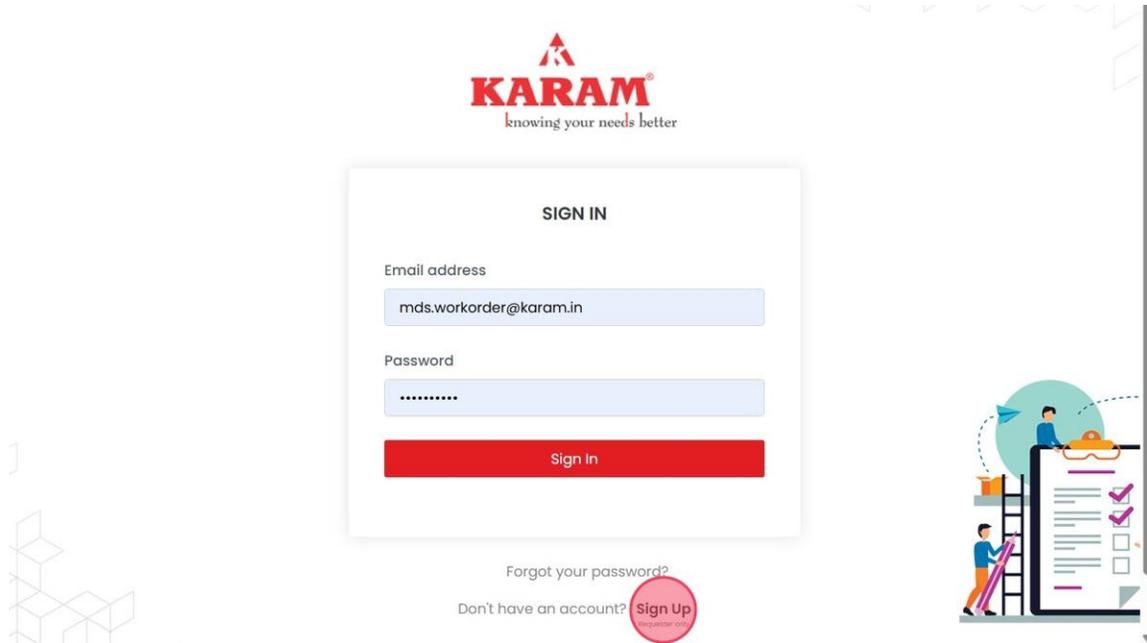


- i. Search for the "workorder" application in the search box
- ii. Click on the "link URL" tab.

Authentication Process

To register yourself in the application

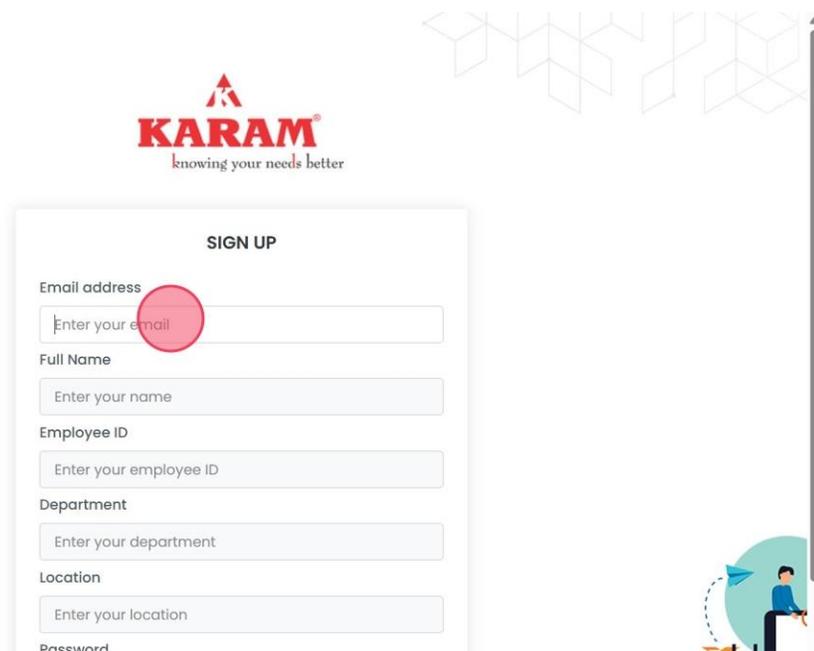
1. Click the "Sign Up Requester only" link



The screenshot shows the KARAM Sign In page. At the top is the KARAM logo with the tagline "knowing your needs better". Below the logo is a white box titled "SIGN IN". Inside this box, there are two input fields: "Email address" with the value "mds.workorder@karam.in" and "Password" with masked characters ".....". A red "Sign In" button is positioned below the password field. Below the sign in box, there are two links: "Forgot your password?" and "Don't have an account? Sign Up Requester only". The "Sign Up Requester only" link is highlighted with a red circle. To the right of the sign in box is an illustration of a person climbing a ladder next to a large document with checkmarks.

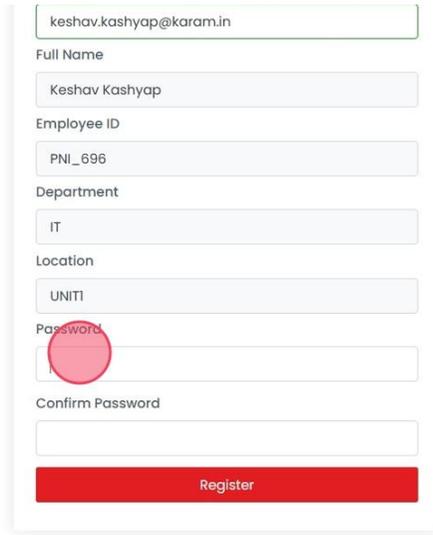
To register, follow these steps:

1. Click on the "Email Address" field and enter your email.
2. After entering your email, click anywhere outside the field, and the Full Name, Employee ID, Department, and Location fields will be automatically populated.



The screenshot shows the KARAM Sign Up page. At the top is the KARAM logo with the tagline "knowing your needs better". Below the logo is a white box titled "SIGN UP". Inside this box, there are five input fields: "Email address" with the placeholder "Enter your email" (highlighted with a red circle), "Full Name" with the placeholder "Enter your name", "Employee ID" with the placeholder "Enter your employee ID", "Department" with the placeholder "Enter your department", and "Location" with the placeholder "Enter your location". Below the location field is a partially visible "Password" field. To the right of the sign up box is an illustration of a person sitting at a desk with a large document and a checkmark.

3. Enter your strong "Password" and re-enter it in the "Confirm Password" field.

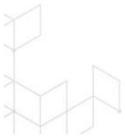


Registration form with the following fields:

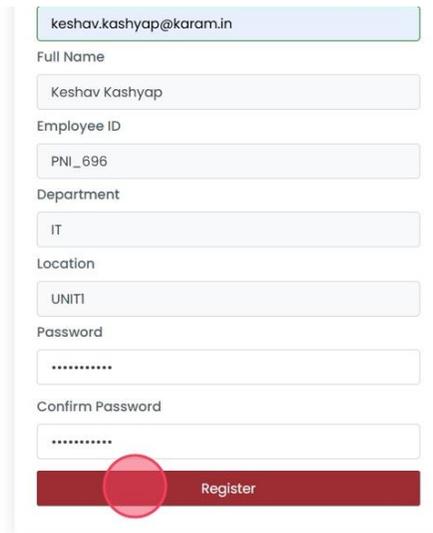
- Email: keshav.kashyap@karam.in
- Full Name: Keshav Kashyap
- Employee ID: PNI_696
- Department: IT
- Location: UNIT1
- Password: (highlighted with a red circle)
- Confirm Password: (empty)

Register

Already have an account [Sign In](#)



4. Click on the "Register" tab.



Registration form with the following fields:

- Email: keshav.kashyap@karam.in
- Full Name: Keshav Kashyap
- Employee ID: PNI_696
- Department: IT
- Location: UNIT1
- Password:
- Confirm Password:

Register

Already have an account [Sign In](#)



Tip!

After registration, the requester will receive a welcome notification containing their username and password.

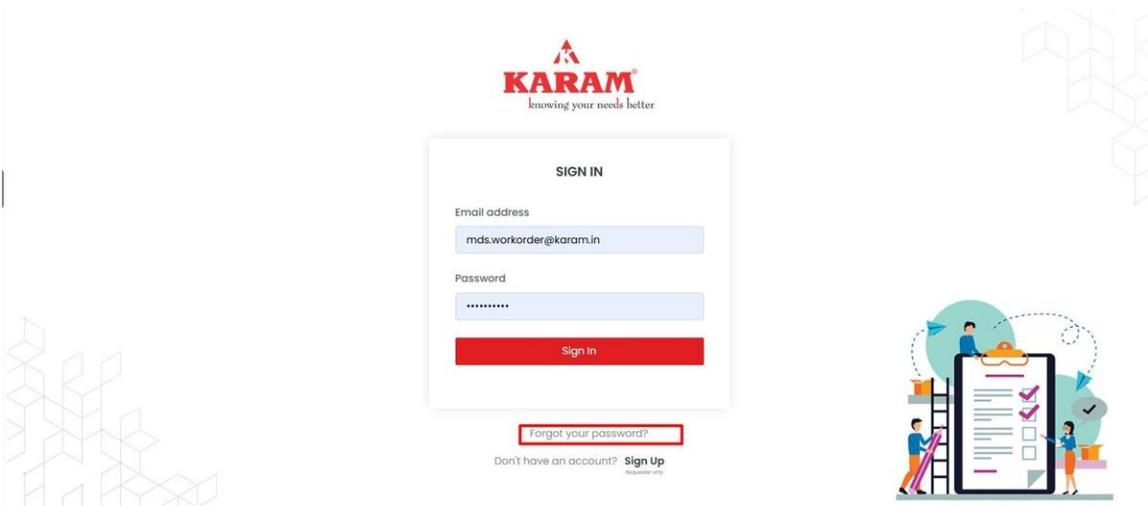
Alert!

If you receive the message ' **Emails don't match our records,**' please get in touch with HR to have your email registered in the Esprsh database. We use the Esprsh DB for employee management.

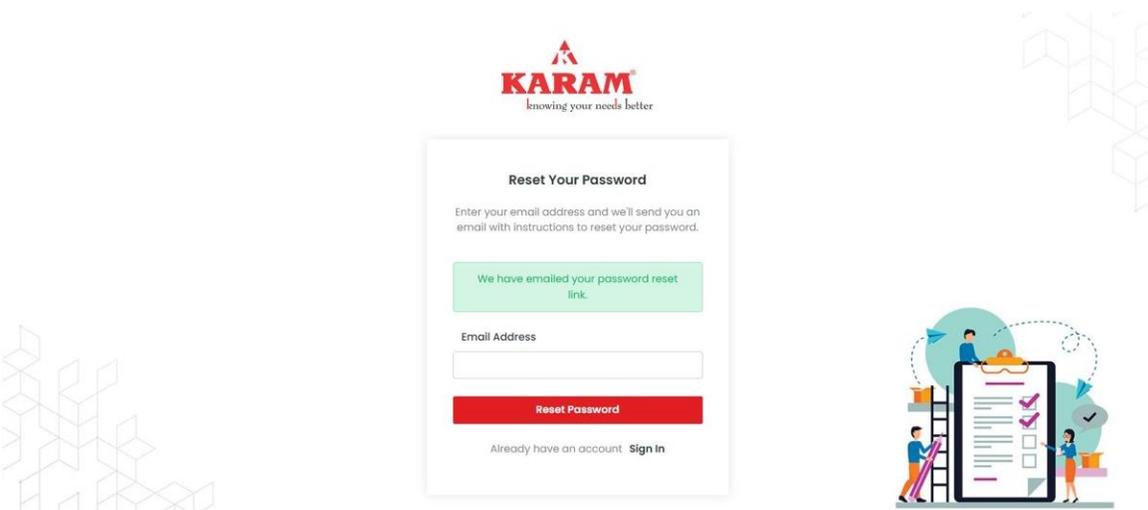
Forgot your password?

To recover your password, follow these steps:

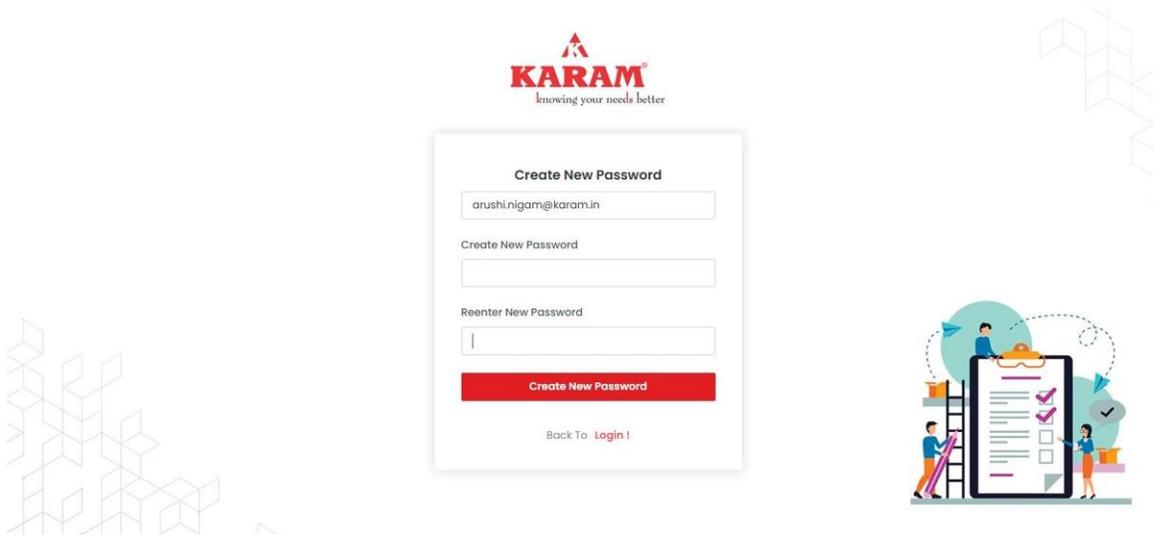
1. Click on "Forgot your password from the sign-in Screen



2. Enter Email ID
3. Click on the Reset Password tab
4. Verify Reset Email.
5. Click on the Reset link.



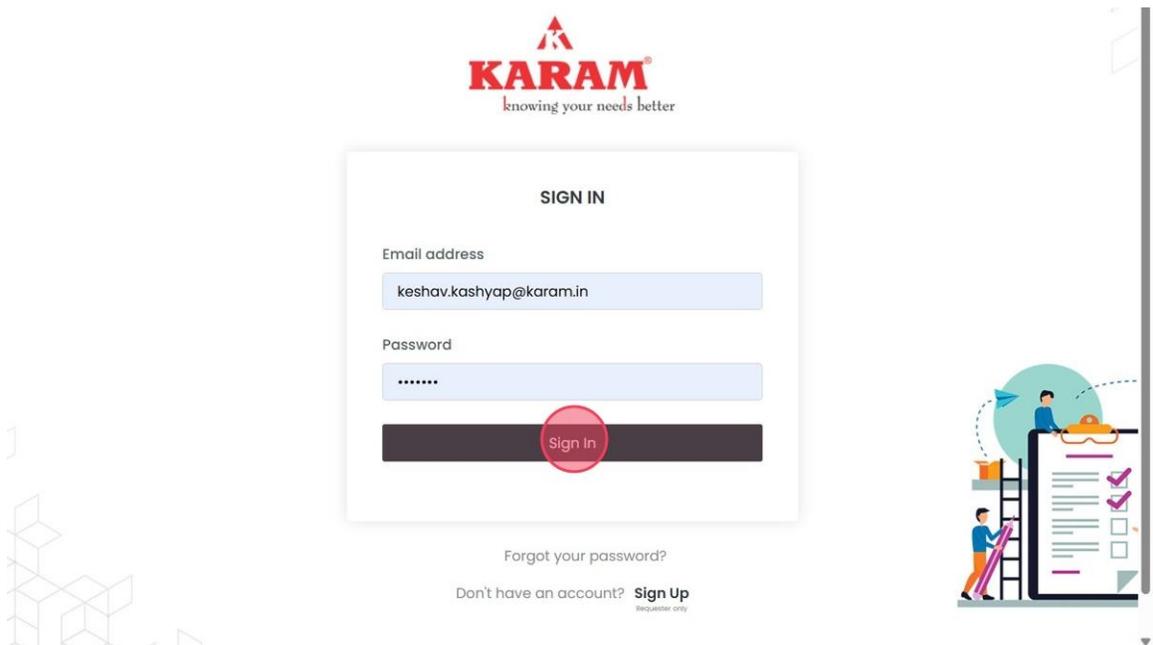
6. Enter the new password and re-enter it in the confirm password
7. Click on the "Create New Password" button.



Sign in to the application

Follow these steps:

1. Enter your email address
2. Enter your password
3. Click on the Sign In tab



Tip!

After logging in, the dashboard will appear with 8 blocks, each providing direct access to the respective screen:

1. **Total Tickets** - Displays the total number of tickets you have raised.
2. **Backlog** - Tickets that were created successfully and are by default assigned to the "Bin Manager."
3. **To Do** - Tickets assigned to the Vertical Head.
4. **In Progress** - Tickets assigned to a Team Member or Designer.
5. **Pending Review** - Tickets sent to the requester for review.
6. **Closed** - Tickets that have been successfully closed.
7. **Re-Open** - Tickets sent to the Vertical Head for rework.
8. **Rejected** - Tickets that have been rejected.

How to Raise a New Request

Follow the steps to raise a new request by the requester:

1. Click the "Create New Request" tab.

The screenshot displays the 'Manage Requests' dashboard. At the top, there are two tabs: 'Dashboard' and 'Manage Requests'. Below the tabs, there are four summary cards showing counts for different request statuses: Pending Review (0), Closed (0), Re-Open (0), and Rejected (0). Below these cards is a section titled 'Recent Requests'. It includes a 'Create New Request' button, a search bar, and a table with columns: Work Order, Requester, Category Name, Required Date, Status, and Action. The table currently shows 'No data available in table'. At the bottom of the dashboard, there is a footer with the text '2025 © All Rights Reserved By KARAM Safety Pvt. Ltd.' and 'Version 1.0.0'.

2. Fill in all the information in the form:
 - i. Request Type
 - ii. Language
 - iii. Category
 - iv. Sub-category
 - v. Pictorial/Text
 - vi. Required Size
 - vii. Use of Artwork
 - viii. Orientation
 - ix. Required date
 - x. Purpose/Artwork brief/ Description
 - xi. Sample attachment (if required)
3. Click on the "Submit" Button.

The screenshot shows the KARAM web application interface. At the top, there is a navigation bar with the KARAM logo on the left and the user name 'Keshav Kashyap' on the right. Below the navigation bar, there are two menu items: 'Dashboard' and 'Manage Requests'. The main content area is titled 'Create New Request'. The form contains several fields:

- Request Type***: A dropdown menu with 'New' selected. A red circle highlights this field.
- Language***: A text input field with 'Select' as a placeholder.
- Category***: A text input field with 'Select' as a placeholder.
- Sub Category***: A text input field.
- Pictorial/Text***: A text input field.
- Required Size***: A text input field.
- Use of Artwork***: A text input field.
- Orientation***: A text input field.
- Required Date***: A date input field with a placeholder 'dd-mm-yyyy' and a calendar icon.
- Purpose/Artwork Brief/Description***: A large text area for entering details.
- Samples/References Attached**: A section with a 'Choose Files' button and the text 'No file chosen'.

After submitting the request, a "Request Created Successfully" message will appear at the top of the screen.

Tip!

Once the requester submits a new work order request and it is assigned to the respective vertical head, the requester will be notified of the assigned vertical head for their raised request.

The request will initially be displayed in the "Backlog" status and will be visible on the dashboard or in the "Manage Request" section, along with the following relevant details:

1. Work Order ID
2. Requester Name
3. Category/Sub-category Name
4. Required Date
5. Tentative Date (if updated by the vertical head)
6. Status
7. Action Section:
 1. **Edit:** Available until the request is not assigned to a vertical head.
 2. **View:** Displays the full request details, including assignee name and current status.
 3. **Track:** Shows the request's journey on the Track Sheet.

The screenshot shows the KARAM web application interface. At the top, there is a navigation bar with 'Dashboard' and 'Manage Requests' options. A green notification banner at the top center reads 'Request created successfully'. The user's name 'Keshav Kashyap' is visible in the top right corner. Below the navigation bar, the 'Manage Requests' section is active, featuring a 'Create New Request' button. The main content area displays a table of requests with columns for Work Order, Requester, Category Name, Required Date, Tentative Date, Status, and Action. A single request is shown with the status 'Backlog'. The interface also includes a search bar, a 'Show 10 entries' dropdown, and pagination controls at the bottom.

Work Order	Requester	Category Name	Required Date	Tentative Date	Status	Action
# 1 Date: 02-04-2025 New	Keshav Kashyap Department: IT	HR & Admin related works / Content Writing Location: UNIT1	09-04-2025	NA	Backlog	Edit View Track

Edit - Edit functionality would only till the request is not assigned to any vertical Head.

Follow these steps to edit any request:

1. Click on the **Edit Icon**.

KARAM

Dashboard Manage Requests

Manage Requests Create New Request

Show 10 entries Search:

Work Order	Requester	Category Name	Required Date	Tentative Date	Status	Action
# 1 Date: 02-04-2025 New	Keshav Kashyap Department: IT Location: UNIT1	HR & Admin related works / Content Writing	09-04-2025	NA	Backlog	

Showing 1 to 1 of 1 entries Previous 1 Next

2. Make the necessary changes and click "Update." The updates will be applied and reflected across all relevant screens.

Dashboard Manage Requests

Category* General Sub Category* Poster

Pictorial/Text* 30:70 Required Size* large

Use of Artwork* i need this artwork for promotion in the OS Orientation* landscape

Required Date* 09-04-2025

Note: The timeline shall be 7 days from the date of request.

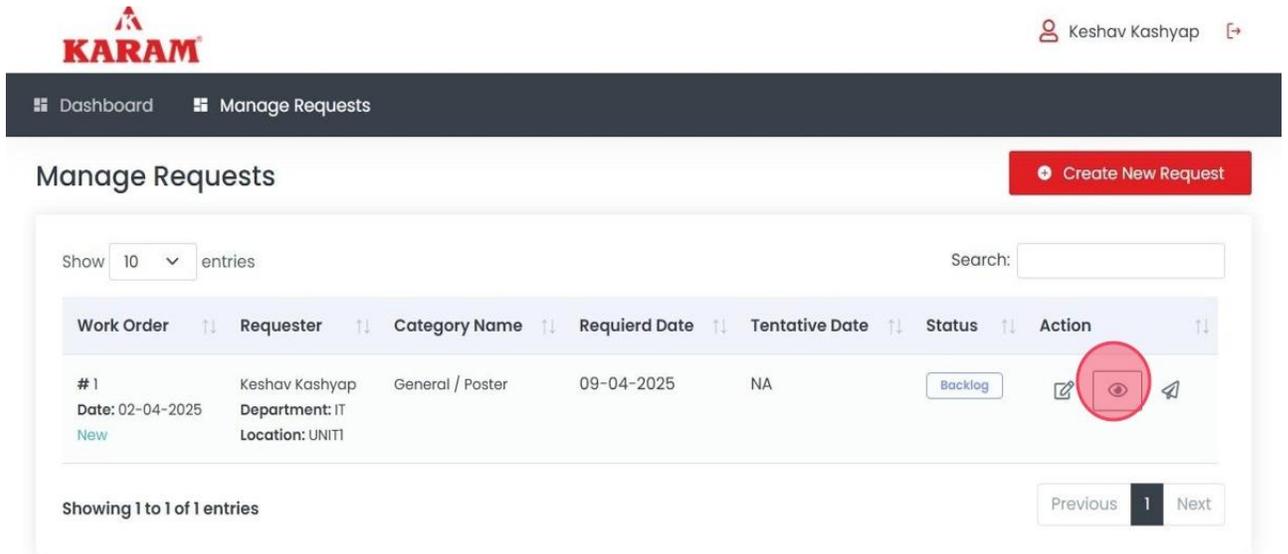
Update Cancel

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View: View the complete request details, including the current stage and status. Additionally, a track trail with detailed information and a comment section will be available.

Find the information that can be seen there:

1. Click On the **View Icon**



The screenshot displays the KARAM web application interface. At the top left is the KARAM logo. At the top right, the user name 'Keshav Kashyap' is shown. Below the header is a navigation bar with 'Dashboard' and 'Manage Requests' options. The main content area is titled 'Manage Requests' and includes a 'Create New Request' button. A table lists the requests, with the first entry circled in red. The table has columns for Work Order, Requester, Category Name, Requierd Date, Tentative Date, Status, and Action. The first entry is for work order #1, requested by Keshav Kashyap, with a date of 02-04-2025 and status 'New'. The 'Action' column for this entry contains a 'Backlog' button, a pencil icon, a red-circled eye icon (the 'View' icon), and a share icon. Below the table, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' navigation buttons.

Work Order	Requester	Category Name	Requierd Date	Tentative Date	Status	Action
# 1 Date: 02-04-2025 New	Keshav Kashyap Department: IT Location: UNIT1	General / Poster	09-04-2025	NA	Backlog	

2. Verify the detailed request data.
3. Confirm the requester's information.
4. Check the current assignee and the latest status updates.
5. Review the track status.
6. Enter a comment, select the recipient to notify, and click the submit button in the Activity Section. (If required)


Keshav Kashyap

Dashboard
Manage Requests

Workorder Request Details 2

Workorder Id:	#1
Created Date:	02-04-2025
Request Type:	New
Category of work:	General / Poster
Language:	English Hindi
Pictorial/Text:	30:70
Orientation:	landscape
Required Date:	09-04-2025
Purpose:	For Testing or preparing the Manual
Attachment:	

Requester Information 3

Name: Keshav Kashyap

Designation: Software Analyst

Phone:

Email ID: keshav.kashyap@karam.in

Location: UNIT1

Department: ITI

4 Assignee:

Status:

Track Status 5

Backlog | 2025-04-02 11:42:25
Assignee : Mohit Dutt

Activity 6

Notify To*

Comments*

Normal B I U 🔗 📌

Upload Attachment

KK

Keshav Kashyap | 02-04-2025 11:44:33

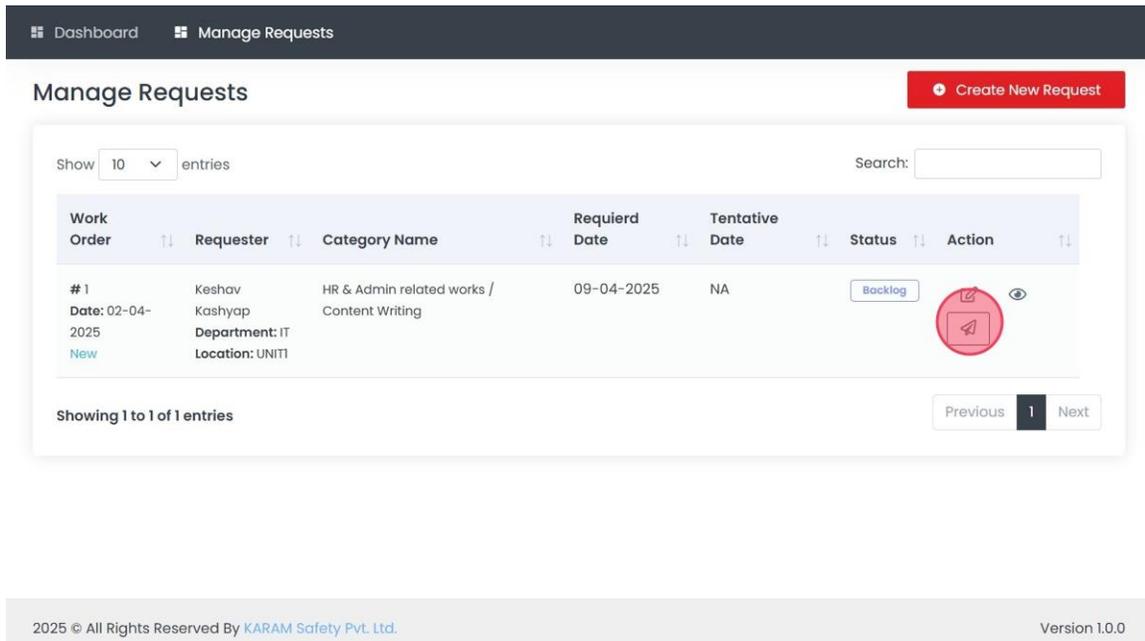
Please do the needful (Preparing the Manual) please ignore

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Version 1.0.0

Track: Track the request status.

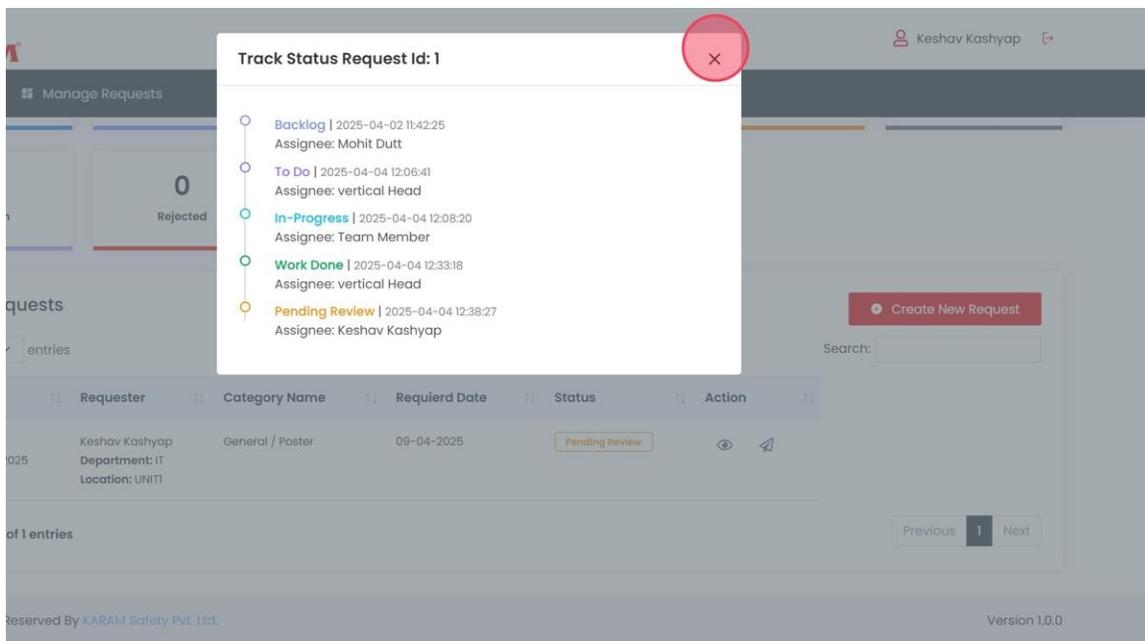
Follow these steps to track:

1. Click the **"Track" Icon**.



The screenshot shows the 'Manage Requests' dashboard. At the top, there are navigation links for 'Dashboard' and 'Manage Requests', and a red 'Create New Request' button. Below the navigation is a search bar and a dropdown menu set to '10 entries'. The main content is a table with the following columns: Work Order, Requester, Category Name, Required Date, Tentative Date, Status, and Action. A single entry is visible with the following details: Work Order #1, Requester Keshav Kashyap, Category Name 'HR & Admin related works / Content Writing', Required Date '09-04-2025', and Tentative Date 'NA'. The Status is 'Backlog'. In the Action column, there is a 'Track' icon (a square with a magnifying glass) highlighted with a red circle. Below the table, it says 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next'. At the bottom, there is a footer with '2025 © All Rights Reserved By KARAM Safety Pvt. Ltd.' and 'Version 1.0.0'.

2. Review Track Updates along with date & Time



The screenshot shows a modal window titled 'Track Status Request Id: 1' overlaid on the 'Manage Requests' dashboard. The modal contains a vertical timeline of updates for the request. The updates are as follows: 'Backlog | 2025-04-02 11:42:25 | Assignee: Mohit Dutt', 'To Do | 2025-04-04 12:06:41 | Assignee: vertical Head', 'In-Progress | 2025-04-04 12:08:20 | Assignee: Team Member', 'Work Done | 2025-04-04 12:33:18 | Assignee: vertical Head', and 'Pending Review | 2025-04-04 12:38:27 | Assignee: Keshav Kashyap'. The 'Pending Review' status is highlighted in orange. The modal has a close button (X) in the top right corner. The background shows the 'Manage Requests' dashboard with the 'Track' icon highlighted in a red circle. The footer of the dashboard shows 'Reserved By KARAM Safety Pvt. Ltd.' and 'Version 1.0.0'.

Review Stage

Once the designer completes the creative work order, it is sent to the vertical head for review. After verifying the work, the vertical head then forwards it to the requester for review and approval.

Tip!

When the vertical head sends the work order for review to the requester, the requester will receive a notification indicating that the request has been completed.

Follow these steps to review the creative work order:

1. To review the completed creative work for final approval. You can access it in one of the following ways:
 - i. From the **Top Pending Review** block
 - ii. Through the **Recent Requests** section
 - iii. By navigating to **Manage Requests**

The screenshot shows the KARAM dashboard interface. At the top, there is a navigation bar with the KARAM logo on the left and the user name 'Keshav Kashyap' on the right. Below the navigation bar, there is a 'Dashboard' section with six cards representing different ticket statuses: Total Tickets (1), Backlog (0), TO Do (0), In-Progress (0), Pending Review (1, 1), and Closed (0). The 'Pending Review' card is highlighted with a red box. Below the dashboard is a 'Recent Requests' section with a 'Create New Request' button, a search bar, and a table of requests. The first request is highlighted with a red box and a '2' notification.

Work Order	Requester	Category Name	Requird Date	Status	Action
# 1 Date: 02-04-2025 New	Keshav Kashyap Department: IT Location: UNIT1	General / Poster	09-04-2025	Pending Review	2

2. When the requester reaches the view screen, they have two choices:
 - i. They can close the request immediately if they are satisfied with the creative work.
 - ii. Alternatively, they can reopen the request if additional revisions are required.

Requester Information	
Name:	Keshav Kashyap
Designation:	Software Analyst
Phone:	
Email ID:	keshav.kashyap@karam.in
Location:	UNITI
Department:	ITI

Track Status	
Assignee:	Keshav Kashyap
Status:	Pending Review
TDOD:	Pending Review
	Move to Closed : Closed
	Move to Reopen : Reopen

Process for Closing and Reopening

1. *i. To Close the Request*

Select the "Close" status from the dropdown.

The request will be closed under the corresponding work order ID, and all related information, including the chat, track sheet, and request details, will be emailed as a historical record.

Notification: A closure email will be sent to all individuals involved in the raised work order request, including all relevant details.

2.

ii. To Re-open the Request

Select the "Re-open" status from the dropdown.

The request will be sent back to the vertical head, who will reassign it to the designer. The designer will make the necessary changes, then return the updated work to the vertical head, who will send it to the requester for review.

Procedure for Adding Comments

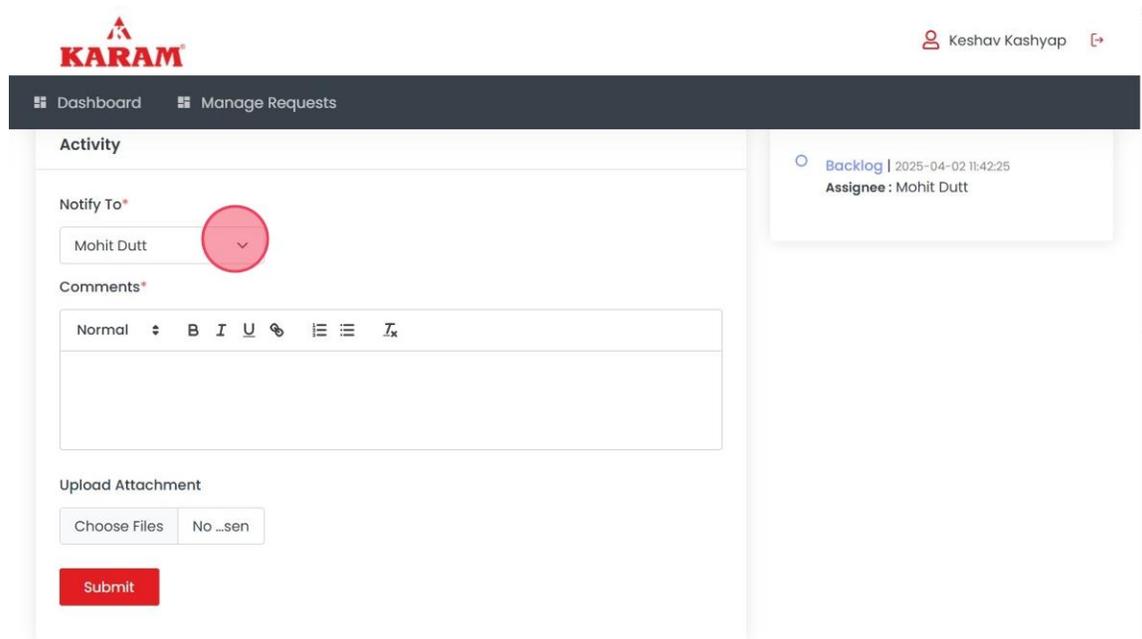
Comment

To add a comment, follow these steps from the Activity section under the view screen:

1. Select a name from the "Notify To" dropdown.
2. Enter your comment in the text area.
3. Upload an attachment (Optional)
4. Click the "Submit" button.

Tip!

When a comment is submitted, a notification is sent to the selected recipient as per the "Notify To" dropdown choice.



The screenshot displays the KARAM web application interface. At the top left is the KARAM logo. The top right shows the user profile 'Keshav Kashyap'. Below the navigation bar, there are two tabs: 'Dashboard' and 'Manage Requests'. The main content area is titled 'Activity'. It features a 'Notify To*' dropdown menu with 'Mohit Dutt' selected. Below this is a 'Comments*' text area with a rich text editor toolbar (Normal, Bold, Italic, Underline, Link, List, Unlink). Underneath is an 'Upload Attachment' section with a 'Choose Files' button and a 'No ...sen' button. At the bottom of the form is a red 'Submit' button. To the right of the form, a notification card is visible, showing a 'Backlog' item with a timestamp of '2025-04-02 11:42:25' and an assignee of 'Mohit Dutt'.

Alert!

To comment on someone, they must be included in the thread. They will be added to the "Notify To" section once the request ID reaches them.

After submitting the comment, it will appear in the chat section and be visible to everyone involved in the request. Once the request is closed, the chat section will remain as a permanent history.

Request Cancellation Procedure Overview

Cancelled Request

A request can be cancelled by either the Vertical Head or the Bin Manager, accompanied by a valid reason for the rejection.

After the cancellation, the status will be updated to "Rejected" on all dashboards, and all actionable windows will be closed, along with all history records.

Notification - Once a request is cancelled, the requester will receive an email notification containing the rejection reason.

In the Event of TDOD Update

Change in TDOD

The Vertical Head can modify the TDOD if necessary.

Notification: Whenever the Vertical Head changes the TDOD, a notification is sent to the requester as a note.

-----Thank You-----