



# DipNotes Post Admin Manual

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## INTRODUCTION

A diplomatic note is used as official correspondence between the U.S. Government and a foreign government. The Secretary of State corresponds with diplomatic representatives of foreign governments at Washington, DC, U.S. embassies abroad, and foreign offices or ministries.

<https://fam.state.gov/fam/05fah01/05fah010610.html>

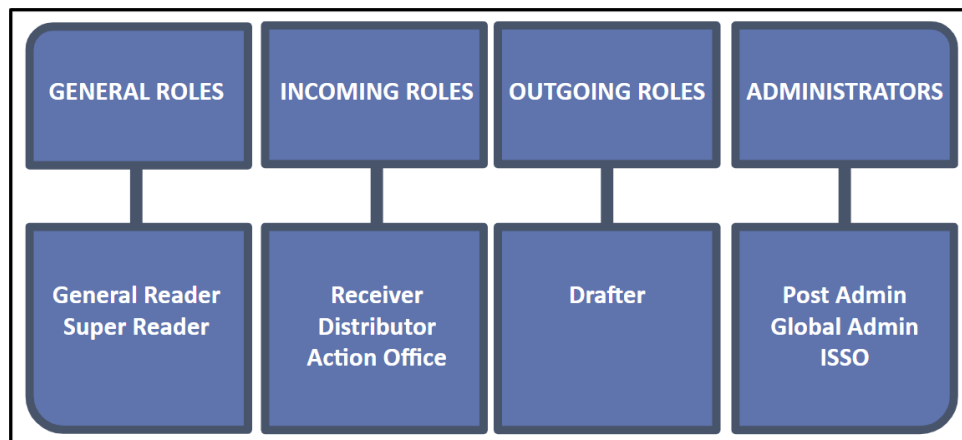
## WHAT IS DIPNOTES?

The DipNotes application is an innovative solution to streamline and enhance the management of diplomatic communications for our Missions worldwide. To highlight system features:

- Cloud-based and protected by IRM’s OKTA authentication, therefore accessible from both OpenNet and Internet, using Multi-Factor Authentication (MFA) via OKTA.
- Granted the Authority to Operate by IRM.
- Handles the entire lifecycle of a diplomatic note
- Scalable to accommodate different-sized posts
- Powerful internal search engine utilizing Optical Character Resolution or OCR
- Changes in the are recorded in the history log
- Allows the user to enable or disable email notifications
- Ability to reassign a diplomatic note to another office within mission, or another post.

## UNDERSTANDING THE ROLES AND PERMISSIONS

There are 9 user roles available in DipNotes, each with a different set of responsibilities and user permissions. A user can be assigned to multiple roles at any one time.



## GENERAL READER

The General Reader role can view all incoming and outgoing diplomatic notes that do not contain PII. However, a general reader can view DipNotes containing PII if within their office and if the user account has the PII designation.

## SUPER READER

The Super Reader role can view all incoming and outgoing diplomatic notes within Post, including PII.

## RECEIVER

This office is responsible for receiving hard copies of the diplomatic note from an outside organization. The Receiving Office scans and uploads the hard copy of the diplomatic note and uploads it into the DipNotes application.

## DISTRIBUTOR

The Distributor receives the diplomatic note scanned by the **Receiver**. Responsible for reviewing and distributing the diplomatic note to appropriate office(s), including rejecting, cancelling, or transferring a diplomatic note to a different post.

## ACTION OFFICE

The Action Office receives the diplomatic note from the **Distributor** and is responsible for taking action on a diplomatic note. An Action Office may accept, cancel, or reject a diplomatic note, as well as reassign a diplomatic note to another office within mission or transfer to another post.

## DRAFTER

A Drafter is responsible for drafting, publishing, and archiving a diplomatic note to SMART (*if available*). A Drafter also manages the document templates for creating a diplomatic note and contact information of outside organizations.

## POST ADMINISTRATOR

The Post Administrator can perform all actions at Post Level, including managing users and their permissions. The post administrator can also select users from different posts and give them roles within mission.

## GLOBAL ADMINISTRATOR

The Global Administrator can perform all the actions of a Post Administrator and has full access to all features and control over all posts. (*This is an ADG-specific role*)

## ISSO

This role has read access to all incoming and outgoing diplomatic notes of every post. The ISSO can also manage users and their roles in the application. (*This is an ADG-specific role*)

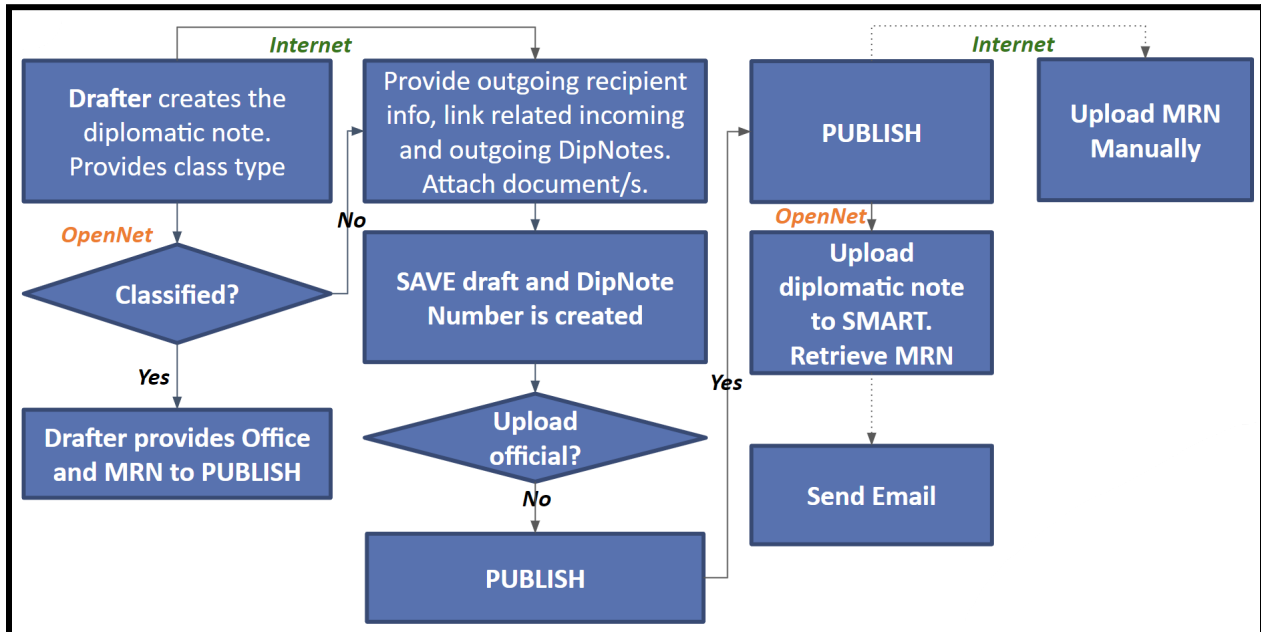
## \* INFO GROUP

The Info Group receives a read-only copy of the diplomatic note. If an office is selected as an Info Group, the office is able to view all contents, including PII, but is not required to take action on the diplomatic note.

## PROCESS FLOW

### OUTGOING DIPNOTES

**Outgoing Dipnotes** are diplomatic notes that are sent out to the host nation, foreign embassies, or international organizations.

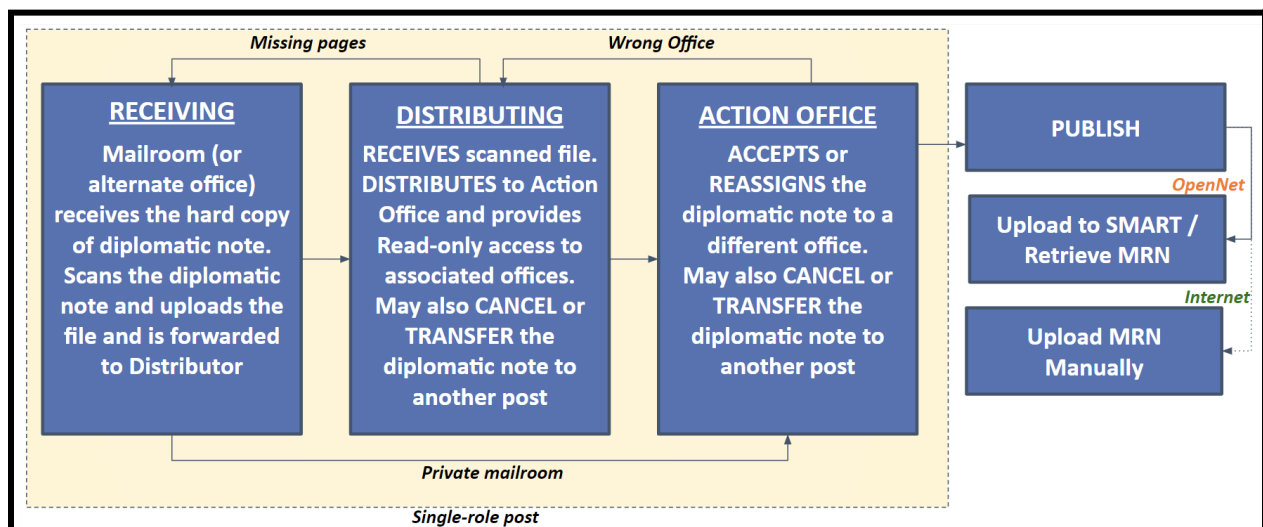


- Users with the drafter role create the diplomatic note. *The user may use the existing templates uploaded by other drafters within the Mission to draft a diplomatic note.*
- The drafter enters the **DipNote classification** (Unclassified, Sensitive but Unclassified (SBU), or Classified), **office owner** of the diplomatic note, **subject**, **outgoing recipient**, **send date**, if the diplomatic note contains **PII**, and the **summary**.
- If the drafter declares that the diplomatic note contains PII, s/he may choose multiple offices who will be able to view the contents of the diplomatic note.
- The drafter has the option to upload the draft of the diplomatic note and may attach any related documents.
- The drafter may link related past incoming and outgoing diplomatic notes.
- Drafter clicks **Save DipNote** and a Diplomatic Number is created.
- If Drafter attached a draft of the diplomatic note, Drafter must attach an official (stamped and signed) copy of the diplomatic note before publishing.
- The drafter may click **Update**, **Publish Only** or **Publish and Send Email Only**.
- If the drafter is connected via OpenNet, GoDesktop or GoVirtual and the user has an active SMART account, the system uploads the diplomatic note to SMART and attempts to retrieve an MRN. The status of the diplomatic note is updated to **PUBLISHED**.
- Otherwise, if the drafter connected via Internet, the status of the diplomatic note is updated to PUBLISHED. However, the diplomatic note is not automatically uploaded to SMART. The drafter will have to manually enter the MRN.

- Once a diplomatic note has been Published, the Drafter can always come back and update the **MRN** and attach documents.
- If an official diplomatic note is attached, the drafter will have the option to send the diplomatic note as an email.

## INCOMING DipNOTES

**Incoming DipNotes** are diplomatic notes that are official correspondences and communications the U.S. embassy receives from an outside organization.

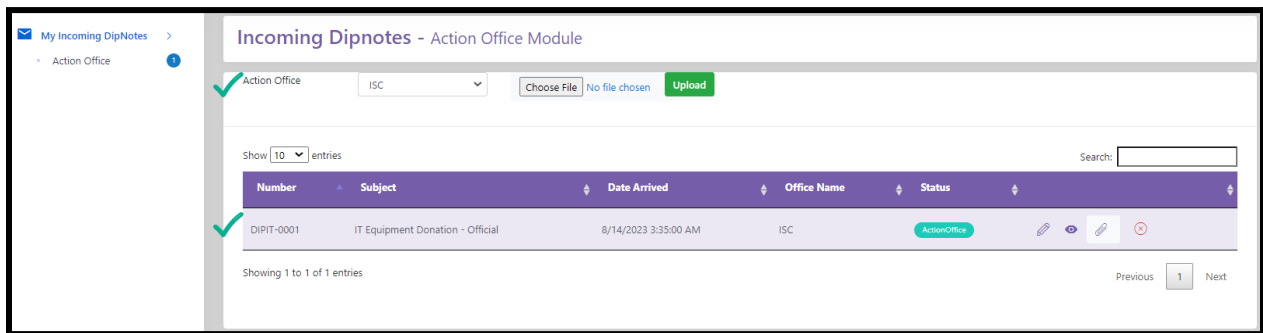


- Users with the **Receiving** role receive the official hard copy of the diplomatic note from an outside organization. The Receiver scans the diplomatic note and uploads the file to the DipNotes application. Once successfully uploaded, the diplomatic note is forwarded to the **Distributor's** queue.
- If the Receiving office is tagged as **Private Mailroom**, the scanned file will be forwarded directly to the **Action Office's** queue.
- The **Distributor** reviews the diplomatic note. The Distributor may **REJECT** the diplomatic note back to the Receiver, **CANCEL** with the diplomatic note information remaining in the system, **TRANSFER** the diplomatic note to another post, or forward the diplomatic note to an **Action Office**. The Distributor may also select offices, called **Info Groups**, that can view the diplomatic note. Info Groups will be able to see the contents of the diplomatic note even if it contains PII.

- The **Action Office** may accept the diplomatic note for further action. They may also **REJECT** the diplomatic note back to the distributor, wherein the distributor can distribute the diplomatic note to a different office. The Action Office can also **REASSIGN** the diplomatic note to an office within a mission or **TRANSFER** to another post.

## SINGLE AND MULTI-ROLE POSTS

**Single-Role Posts** Typically small embassies or consulates that have only one office assigned to receive, review, and take action on the diplomatic notes. The **Action Office** is assigned to do the receiving, reviewing and taking further action to the diplomatic note.



**Multi-Role Posts** Typically cater to big embassies that have different offices assigned as **Receiver** (i.e. Mailroom), **Distributor** (i.e. Protocol), and **Action Office**.

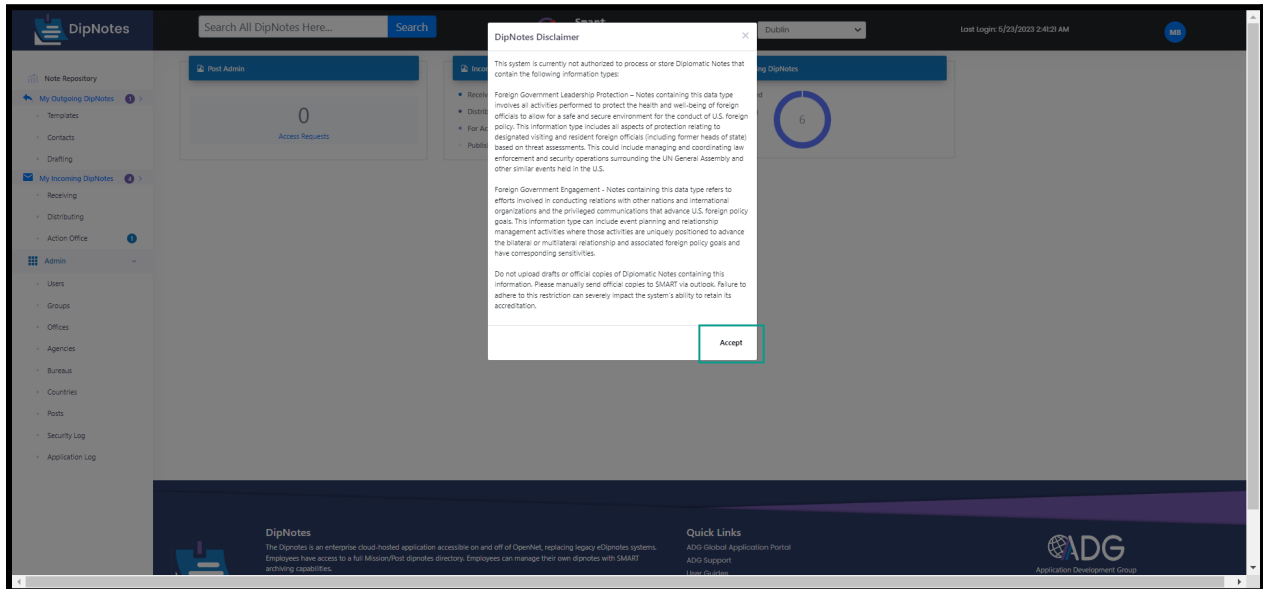
## LOGGING INTO DIPNOTES

Login to **DipNotes** using this link <https://dipnotes.state.gov/>.

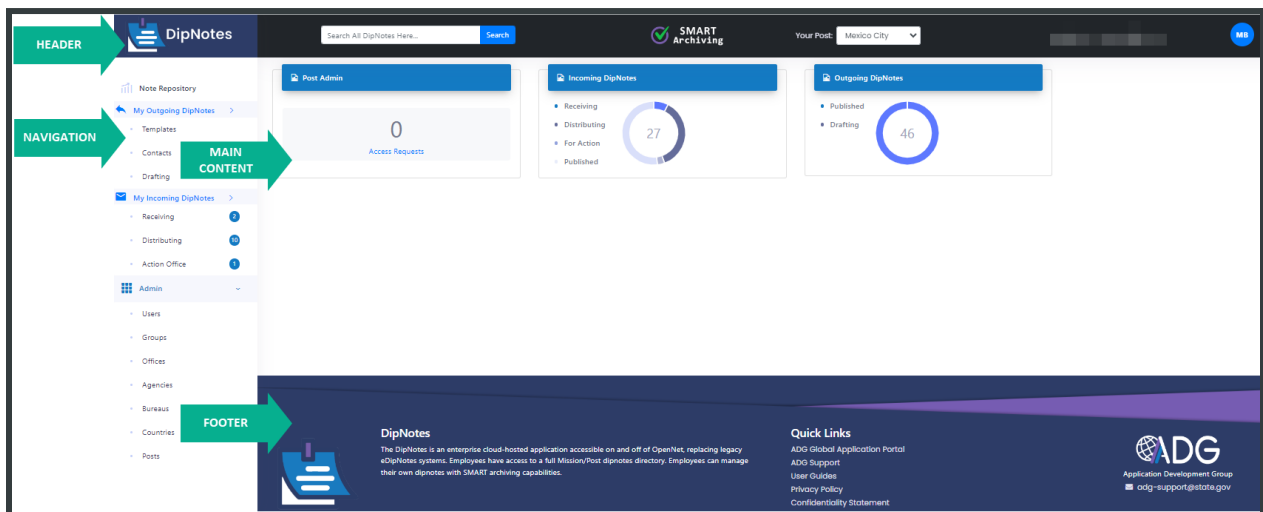
You may also access DipNotes by going to the Okta dashboard (<https://state.okta.com>) and clicking the DipNotes tile.

Upon logging in, the **DipNotes Disclaimer** popup window will appear. Click **Accept**.







## NAVIGATION



### 1. Header contains the following:

- DipNotes logo
- **Search facility** searches all incoming and outgoing diplomatic notes within mission including the contents of the attachment/s.

- The header also serves as a visual marker or reminder of which network the user is logged into. If connected on OpenNet, the user will see  in the header. Otherwise, the user will see .
  - **Your Post** displays the post the user is currently logged into. If the user has access to multiple posts, the dropdown field will list all the posts the user has access to.
  - **My Profile** allows the user to view profile information, notifications, and log out of the application.
2. **Side/Left Navigation** displays the menu available for the user. Menus displayed are permission-driven.
    - **Note Repository** displays a list of published incoming and outgoing diplomatic notes. *\*Only the administrator and ISSO roles will have this menu*
    - **My Outgoing DipNotes** displays a list of outgoing diplomatic notes, regardless of status. This menu is accessible to users that have the Drafter role.
    - **My Incoming DipNotes** displays a list of incoming diplomatic notes, regardless of status. Incoming DipNotes can be accessed by four (4) user roles: *Receiving, Distributing, Action Office, Info Group.*
    - **Admin** manages user access and other post configurations.
  3. **Dashboard/Main Content** contains a visual overview of user access requests and diplomatic notes by status.
  4. **Footer** contains description of the DipNotes application, some related links and the ADG support email.

## SETTING UP YOUR POST

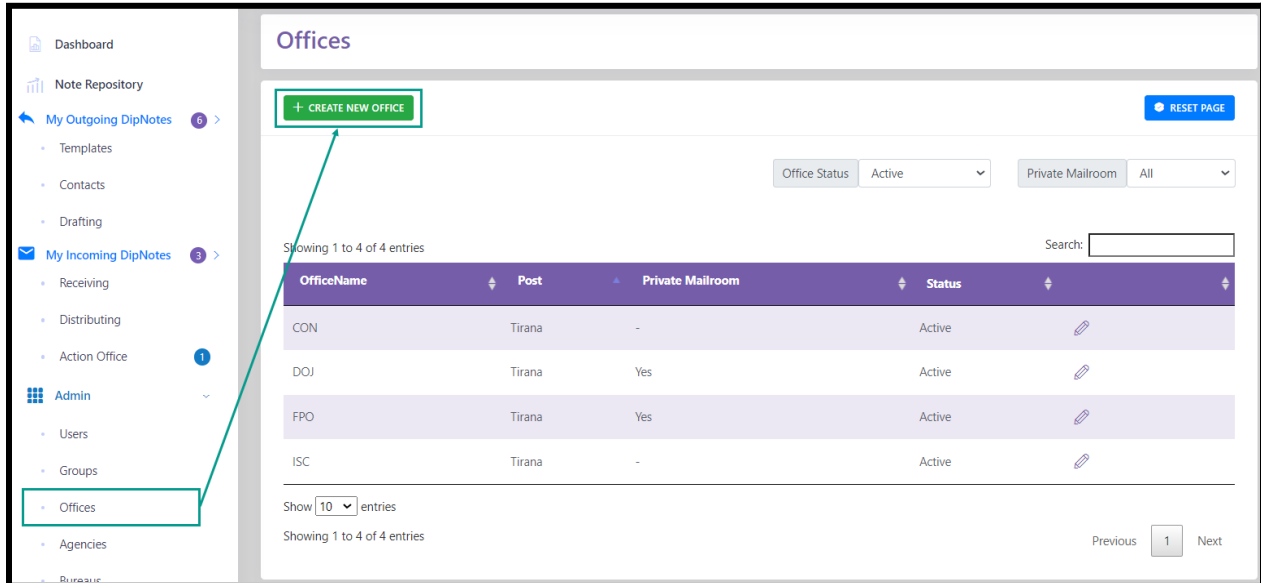
### IDENTIFYING THE POST TYPE AND ADMINISTRATOR ROLES

The post administrator is responsible for managing the users, groups and offices. The post administrator also has access to all incoming and outgoing diplomatic notes within post. The post must identify who will have the Post Administrator role and this will be requested to and set up by the DipNotes Global Administrator.

### SETTING UP THE OFFICES

## CREATING A NEW OFFICE

From the left menu, go to **Admin** and click **Offices**. Then, from the **Offices** page, click on **CREATE NEW OFFICE**.



The screenshot displays the 'Offices' management interface. On the left, the 'Admin' menu is expanded, and 'Offices' is selected. The main area features a '+ CREATE NEW OFFICE' button at the top left. Below it, there are filters for 'Office Status' (set to 'Active') and 'Private Mailroom' (set to 'All'). A search bar is present. The table below shows four existing offices:

OfficeName	Post	Private Mailroom	Status	
CON	Tirana	-	Active	
DOJ	Tirana	Yes	Active	
FPO	Tirana	Yes	Active	
ISC	Tirana	-	Active	

At the bottom, there is a 'Show 10 entries' dropdown and a pagination control showing 'Showing 1 to 4 of 4 entries' with 'Previous', '1', and 'Next' buttons.

Then, from the **Office - Create** page, enter the **Office Name**. Set the office to active by checking the **Is Active** checkbox. If the office has a private mailroom, check the **Private Mailroom** checkbox.

### Office - Create

---

Office Name

Post

Is Active

Private Mailroom

**Message** Your post is set to be Multi Role Post. Once you create your office two security groups would be created automatically for you

- Dublin - Drafter - [Your Office]
- Dublin - Action Office - [Your Office]

If you select Private MailRoom a new group: Dublin - Receiver - [Your Office] would be created.

If the post is set as a multi-role post, the application automatically creates a **Receiver** role (e.g. Dublin - Rcvr - MAILROOM/RCVR) for the whole post **Drafter** and **Action Office** roles for the newly created office.

### WHAT IS A PRIVATE MAILROOM?

An office is set as **Private Mailroom** when the post already has a **Receiver** role (usually the IRM Mailroom) who receives the diplomatic notes for all offices. However, there are specific offices (e.g., DOJ) who receive their own physical diplomatic notes and do not need to go through the **Distributing** group to review the diplomatic note and distribute it to the appropriate office.

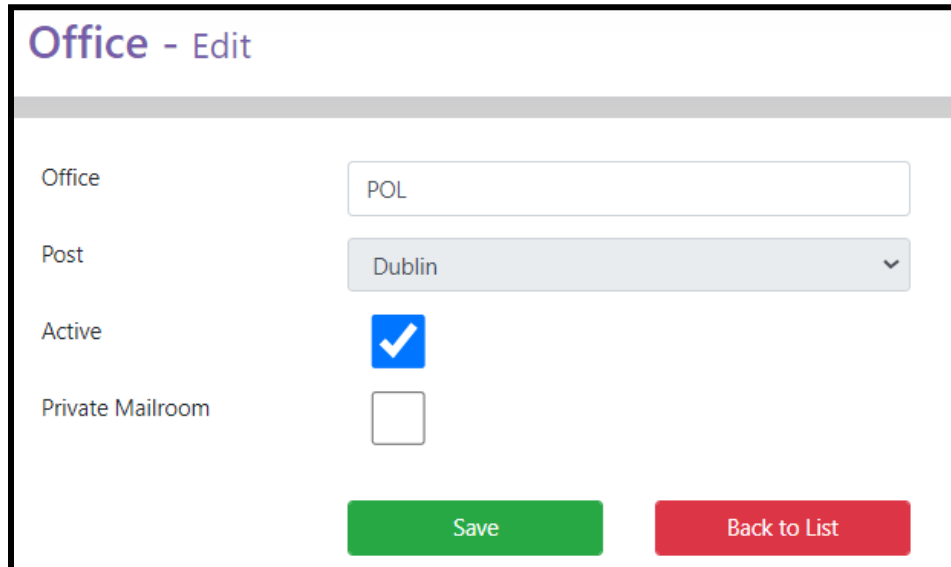
### EDITING AN OFFICE

To edit an office, go to **Admin** and click **Offices**. Then, from the **Offices** page, select from the office list and click on the **Edit** icon.

From the **Office - Edit** page, edit the necessary fields and click **Save**.

## ACTIVATING OR DEACTIVATING AN OFFICE

From the **Offices** page, select from the office list and click on the **Edit** icon. From the **Office - Edit** page, check or uncheck the **Active** checkbox and click **Save**.



## SETTING UP GROUPS

**Groups** are made up of users that share the same permissions or roles. The DipNotes application has groups for the following: **Receiver**, **Drafter**, **Action Office**, **Distributor**, **Post Admin**, **Global Admin**, **ISSO**.

The naming convention of a group is **<Post Name> - <Role> - <Section>**.

The groups, however are created depending on how the post and the office are configured:

### 1. Multi-Role Post

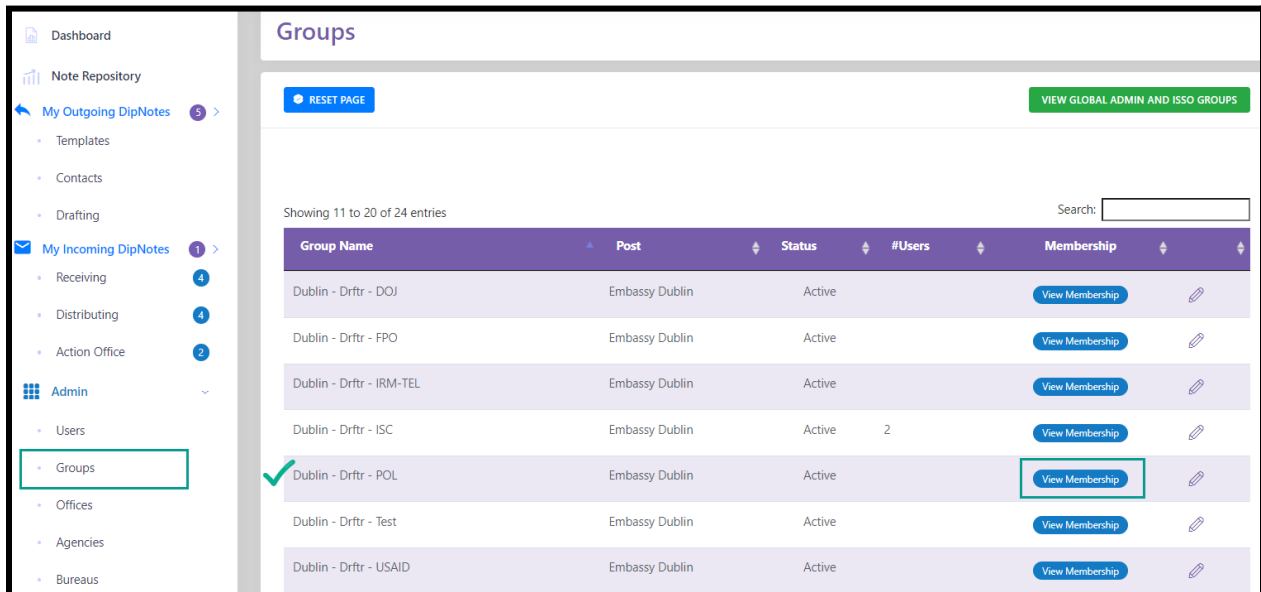
- If the post is set as a **multi-role post**, the application automatically creates a **Receiver** group for the entire post (e.g. *Dublin - Rcvr - MAILROOM/RCVR*).
- If the office created has **Private Mailroom** enabled, only the **Receiver** group is created (e.g. *Dublin - Rcvr - FPO*)
- If the office created has Private Mailroom disabled, the following groups are created for that office: **Drafter** and **Action Office** (e.g. *Dublin - ActnOfcr - CON*, *Dublin - Drftr - CON*)

## 2. Single-Role Post

- If the post is set as a single-role **post**, the default groups created are: **Post Admin** and **Super Reader** (e.g. *Kabul - PstAdm, Kabul - Super Reader*).
- For every office created in a single-role post, the following groups are created for that office: **Drafter** and **Action Office** (e.g. *Kabul - ActnOfcr - ISC, Kabul - Drftr - ISC*)

### VIEW GROUPS AND MEMBERSHIP

To view group permission information and members, go to **Admin** and click **Groups**. Then, from the **Groups** page, select from the users list. Click on **View Membership**.



The screenshot displays the 'Groups' management interface. On the left, a sidebar menu includes 'Dashboard', 'Note Repository', 'My Outgoing DipNotes', 'My Incoming DipNotes', and 'Admin'. The 'Admin' section is expanded, and 'Groups' is selected. The main content area shows a table of groups with the following data:

Group Name	Post	Status	#Users	Membership
Dublin - Drftr - DOJ	Embassy Dublin	Active		<a href="#">View Membership</a>
Dublin - Drftr - FPO	Embassy Dublin	Active		<a href="#">View Membership</a>
Dublin - Drftr - IRM-TEL	Embassy Dublin	Active		<a href="#">View Membership</a>
Dublin - Drftr - ISC	Embassy Dublin	Active	2	<a href="#">View Membership</a>
✓ Dublin - Drftr - POL	Embassy Dublin	Active		<a href="#">View Membership</a>
Dublin - Drftr - Test	Embassy Dublin	Active		<a href="#">View Membership</a>
Dublin - Drftr - USAID	Embassy Dublin	Active		<a href="#">View Membership</a>

From the **Groups - View Membership** page, the user can view the group information and the users under this group.

### Groups - View Membership

Name: Dublin - Drftr - POL


Office: POL

Post: Dublin

Active: Active

[+ Add User](#)

Show  entries Search:

User Name	Email	Office	Post	Country	Active	
BardosMG	BardosMG@state.gov	DOJ	Tirana		Active	

Showing 1 to 1 of 1 entries Previous  Next

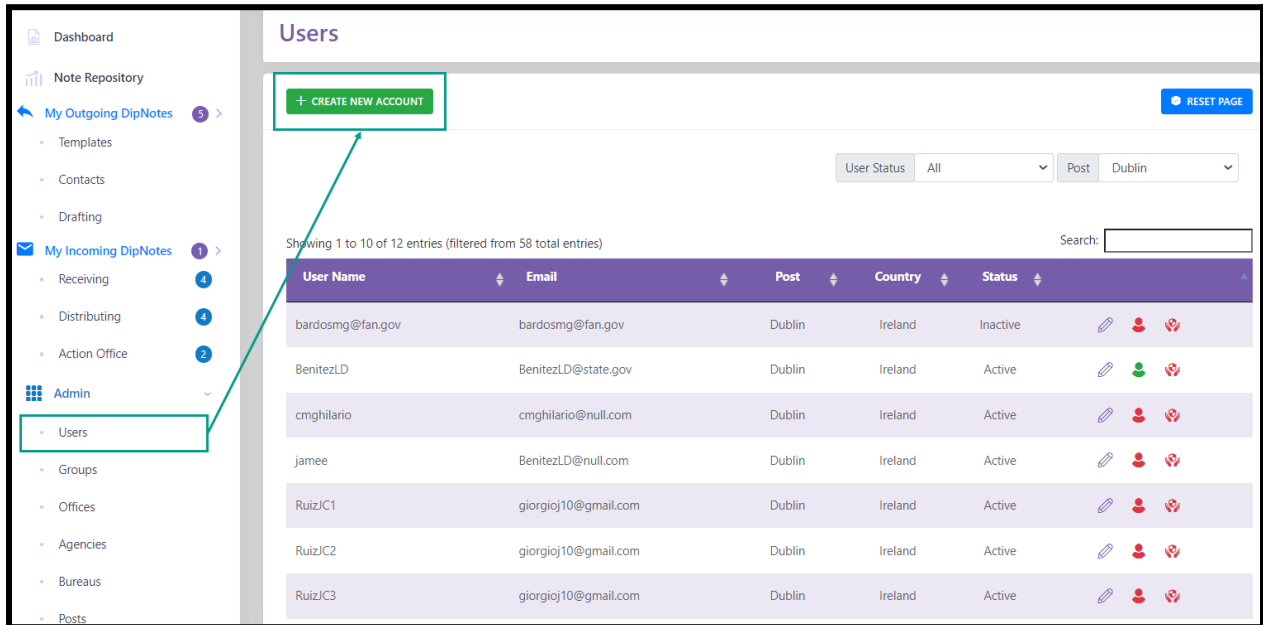
[Back to List](#)

## USERS

There are two types of administrator roles in the DipNotes Application: the Global and Post Administrators. As post administrator, the user will be able to manage the post’s users, groups and offices. As global administrator, the user will be able to do all the tasks of a post administrator, as well as manage agencies, bureaus, countries and posts.

## CREATE NEW ACCOUNT

From the left menu, go to **Admin** and click **Users**. Then, from the **Users** page, click on **CREATE NEW ACCOUNT**.



The screenshot displays the 'Users' management interface. On the left, the 'Admin' menu is expanded to show 'Users'. The main area features a '+ CREATE NEW ACCOUNT' button, a 'RESET PAGE' button, and a table of existing users. The table includes columns for User Name, Email, Post, Country, and Status. A green arrow highlights the 'CREATE NEW ACCOUNT' button.

User Name	Email	Post	Country	Status
bardosmg@fan.gov	bardosmg@fan.gov	Dublin	Ireland	Inactive
BenitezLD	BenitezLD@state.gov	Dublin	Ireland	Active
cmghilario	cmghilario@null.com	Dublin	Ireland	Active
jamee	BenitezLD@null.com	Dublin	Ireland	Active
RuizJC1	giorgioj10@gmail.com	Dublin	Ireland	Active
RuizJC2	giorgioj10@gmail.com	Dublin	Ireland	Active
RuizJC3	giorgioj10@gmail.com	Dublin	Ireland	Active

Then, from the **Office - Create** page, enter the **Office Name**. Set the office to Active by checking the **Is Active** box. If the office has a private mailroom, check the **Private Mailroom** checkbox.

## 1. CREATE ACCOUNT

First, enter all the necessary information and make sure the required fields are filled. Click **Next Step**.



1 Create Account      2 Setup Profile      3 Finalize

### Create New Account

Username: \*

Email address: \*

Display Name: \*

Post: \*

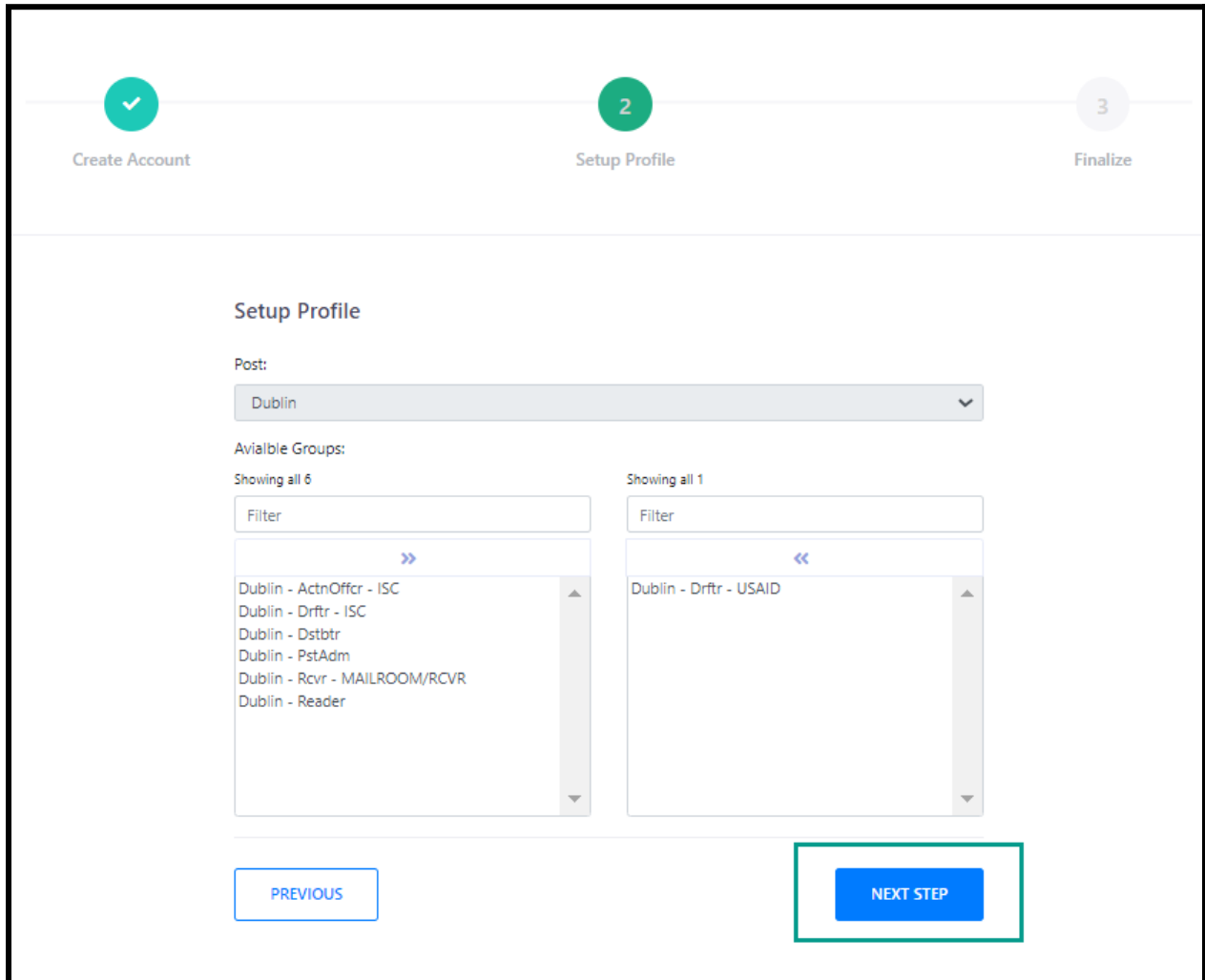
Office: \*

Agency:

Active: \*

## 2. SETUP PROFILE/ADDING USER(S) TO GROUPS

From the **Setup Profile** tab, select the appropriate group from the **Available Groups** listbox. To select more than one group, press and hold the control key and click **Next Step**.



Progress bar: 1. Create Account (checked), 2. Setup Profile (active), 3. Finalize

### Setup Profile

Post:  
Dublin

Avialbe Groups:

Showing all 6

Filter

- Dublin - ActnOffcr - ISC
- Dublin - Drfrtr - ISC
- Dublin - Dstbtr
- Dublin - PstAdm
- Dublin - Rcvr - MAILROOM/RCVR
- Dublin - Reader

Showing all 1

Filter

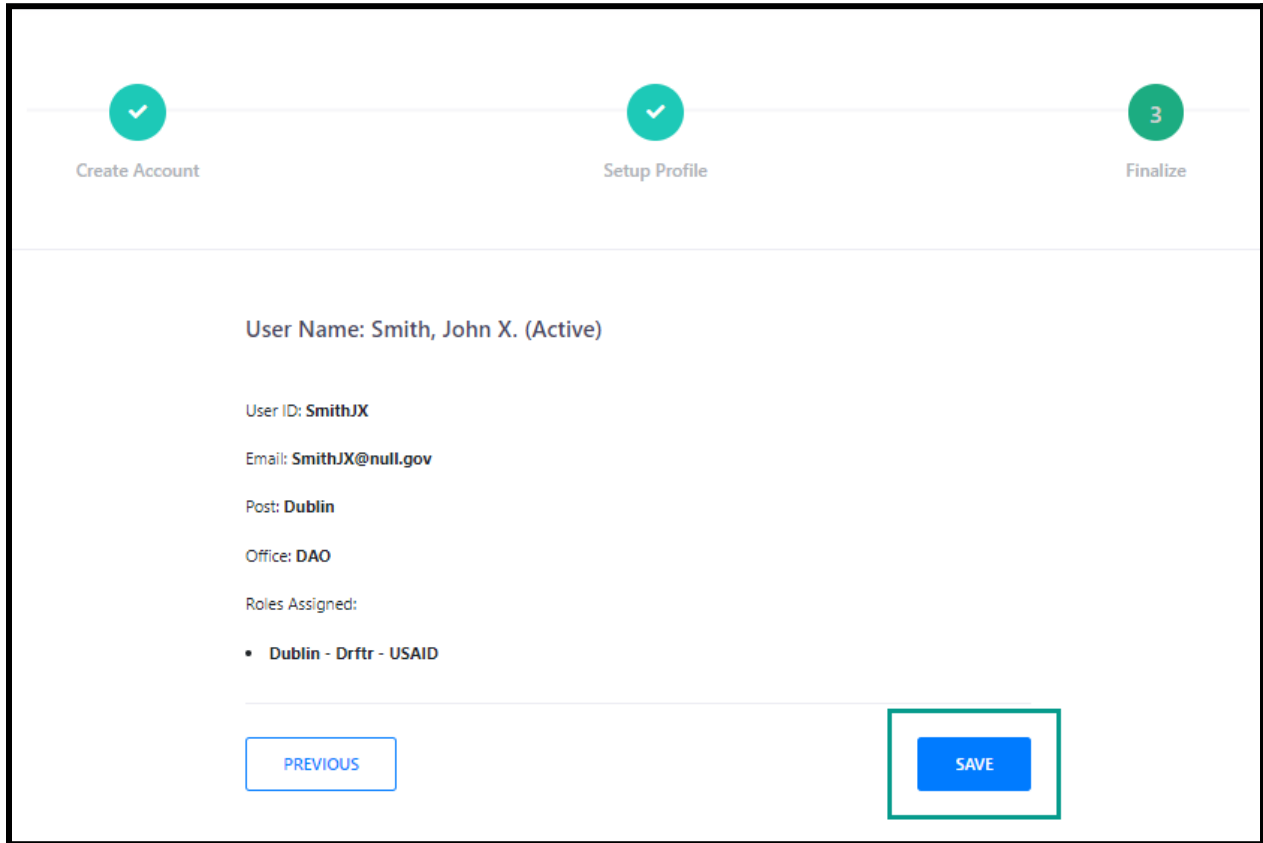
- Dublin - Drfrtr - USAID

PREVIOUS      NEXT STEP

Users can also be added to groups under **Admin > Groups**.

### 3. FINALIZE

From the **Finalize** tab, review all the information. To go back and edit, click **Previous**. Otherwise, click **Save**.



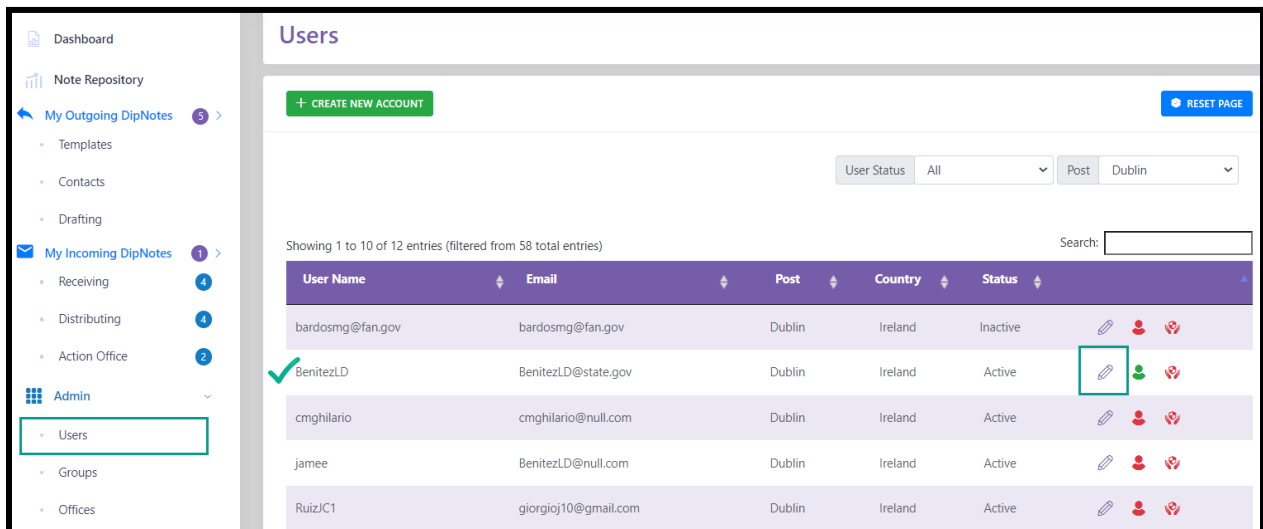
✓ Create Account      ✓ Setup Profile      3 Finalize

**User Name: Smith, John X. (Active)**  
 User ID: **SmithJX**  
 Email: **SmithJX@null.gov**  
 Post: **Dublin**  
 Office: **DAO**  
 Roles Assigned:  
 • **Dublin - Drftr - USAID**

[PREVIOUS](#)      [SAVE](#)

## EDIT USER ACCOUNT

To edit an office, go to **Admin** and click **Users**. Then, from the **Users** page, select from the office list and click on the **Edit** icon.


















Dashboard | Note Repository | My Outgoing DipNotes (5) | My Incoming DipNotes (1) | Admin | **Users**

+ CREATE NEW ACCOUNT      RESET PAGE

User Status: All      Post: Dublin

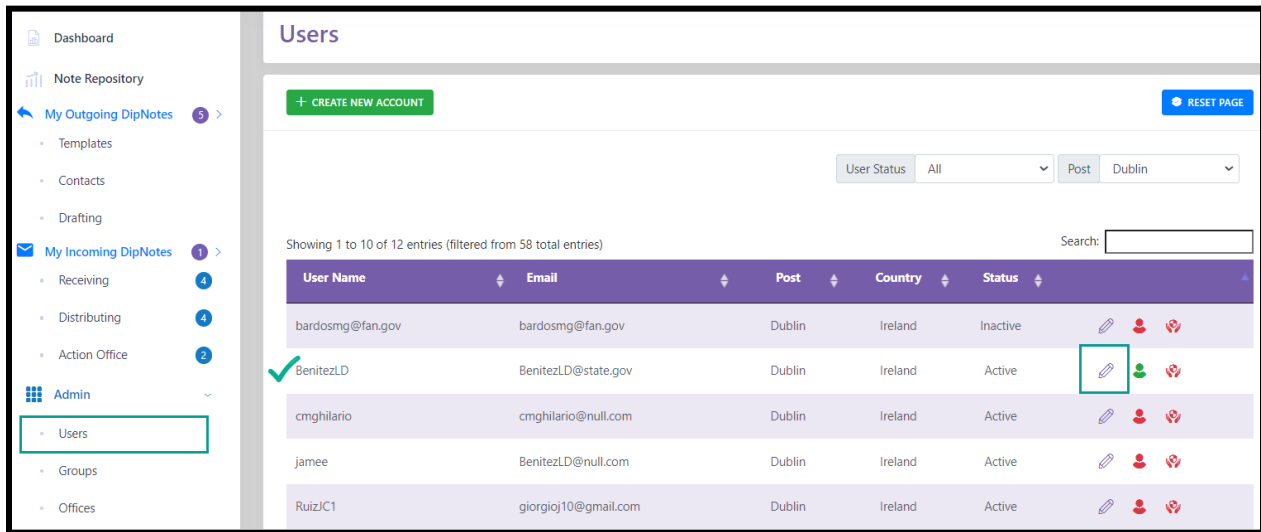
Showing 1 to 10 of 12 entries (filtered from 58 total entries)      Search:

User Name	Email	Post	Country	Status	
bardosmg@fan.gov	bardosmg@fan.gov	Dublin	Ireland	Inactive	  
✓ BenitezLD	BenitezLD@state.gov	Dublin	Ireland	Active	  
cmghilario	cmghilario@null.com	Dublin	Ireland	Active	  
jamee	BenitezLD@null.com	Dublin	Ireland	Active	  
Ruiz/C1	giorgioj10@gmail.com	Dublin	Ireland	Active	  

From the **User Account - Edit** page, the user may edit the user information from the **Edit Account** tab and permission groups in the **Setup Profile** Tab. In the **Finalize** tab, review the changes and click **Submit**.

## ACTIVATE/DEACTIVATE USER ACCOUNT

To deactivate or activate an office, go to the **Users** page, select from the office list and click on the **Edit** icon.



The screenshot displays the 'Users' management interface. On the left, a navigation sidebar includes 'Dashboard', 'Note Repository', 'My Outgoing DipNotes', 'My Incoming DipNotes', and 'Admin'. The 'Admin' section is expanded to show 'Users', 'Groups', and 'Offices'. The main content area is titled 'Users' and features a '+ CREATE NEW ACCOUNT' button and a 'RESET PAGE' button. Below these are filters for 'User Status' (set to 'All') and 'Post' (set to 'Dublin'). A search bar is present. The user list shows 12 entries (filtered from 58 total). The 'BenitezLD' user is marked with a green checkmark and has an edit icon highlighted with a red box. The table columns are: User Name, Email, Post, Country, Status, and a set of action icons (edit, deactivate, delete).

User Name	Email	Post	Country	Status	Actions
bardosmg@fan.gov	bardosmg@fan.gov	Dublin	Ireland	Inactive	[Edit] [Deactivate] [Delete]
BenitezLD	BenitezLD@state.gov	Dublin	Ireland	Active	[Edit] [Deactivate] [Delete]
cmghilario	cmghilario@null.com	Dublin	Ireland	Active	[Edit] [Deactivate] [Delete]
jamee	BenitezLD@null.com	Dublin	Ireland	Active	[Edit] [Deactivate] [Delete]
RuizJC1	giorgioj10@gmail.com	Dublin	Ireland	Active	[Edit] [Deactivate] [Delete]

From the **Edit Account** tab of the **User Account - Edit** page, select **Active** or **Inactive** in the **Active** checkbox and click **Next Step**. From the **Setup Profile** tab, click **Next**. From the **Finalize** tab, click **Submit**.

### Edit Account

Username: \*  
BenitezLD

Email address: \*  
BenitezLD@state.gov

Display Name: \*  
Lara Benitez

Post: \*  
Dublin

Office: \*  
PAS

Agency:  
Department of State

Active: \*  
Active  
-- Select Status --  
Active  
Inactive

BACK TO LIST      NEXT STEP