DipNotes

DipNotes User Manual

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DIPNOTES USER MANUAL

The **DipNotes** application is an innovative solution to streamline and enhance the management of diplomatic communications for our Missions worldwide. 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 in Washington, DC, U.S. embassies abroad, and foreign offices or ministries. (**FAM 5 FAH-1 H-600 DIPLOMATIC NOTES**; https://fam.state.gov/fam/05fah01/05fah010610.html.)

This user manual is intended for the end user who will be receiving, drafting, and sending/publishing diplomatic notes.

WHAT IS DIPNOTES?

The **DipNotes** application is an innovative solution to streamline and enhance the management of diplomatic communications for our Missions worldwide. The following are highlights of the 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 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 Roles and Permissions in DipNotes

The **DipNotes** application has nine user roles, each with a different set of responsibilities and permissions. A user can be assigned to multiple roles at any one time. These nine roles can be categorized into four groups: General Roles, Incoming Roles, Outgoing Role, and Administrators.

Figure 1. User Roles Organized into Four Categories

General Reader role

The **General Reader** role can view all incoming and outgoing diplomatic notes not containing PII (Personally Identifiable Information). However, a **General Reader** can view diplomatic notes containing PII if within their office and the user account has the PII designation.

Super Reader Role

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

Drafter Role

The **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.

Receiver Role

The **Receiver** role is responsible for receiving the hard copy of a diplomatic note from an outside organization. The receiver, typically staff in the Embassy's IRM Mailroom Section, will scan the hard copy of a diplomatic note, and upload it into the **DipNotes** application. Once the diplomatic note is scanned into the system, the note will go straight to the Distributor's queue and the person in the **Distributor** role will receive an email notification.

Distributor Role

The **Distributor** role is the person who receives the scanned diplomatic note. The **Distributor** is responsible for reviewing and forwarding the diplomatic note to the appropriate office(s). In addition to distributing the diplomatic Note, the **Distributor** has the options to reject, cancel, or transfer the diplomatic note to a different post. Once the **Distributor** sends it to an office, the receiving office now takes on the **Action Office** "role".

Action Office Role

The **Action Office** receives the diplomatic note from the **Distributor** and is responsible for taking action on the 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.

Post Administrator Role

The **Post Administrator** role 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 the mission.

Global Administrator Role

The **Global Administrator** role can perform all the actions of a **Post Administrator** and has full access to all features and control over all posts. **ADG** personnel will be the only users having the **Global Administrator** role.

ISSO Role

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

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 can view all contents, including PII, but is not required to take action on a diplomatic note.

SINGLE AND MULTI-ROLE POSTS

Single-role posts are typically smaller embassies or consulates having only one office assigned to receive, review, and take action on diplomatic notes. The **Action Office** is assigned to do the receiving, reviewing, and taking further action to the diplomatic note.

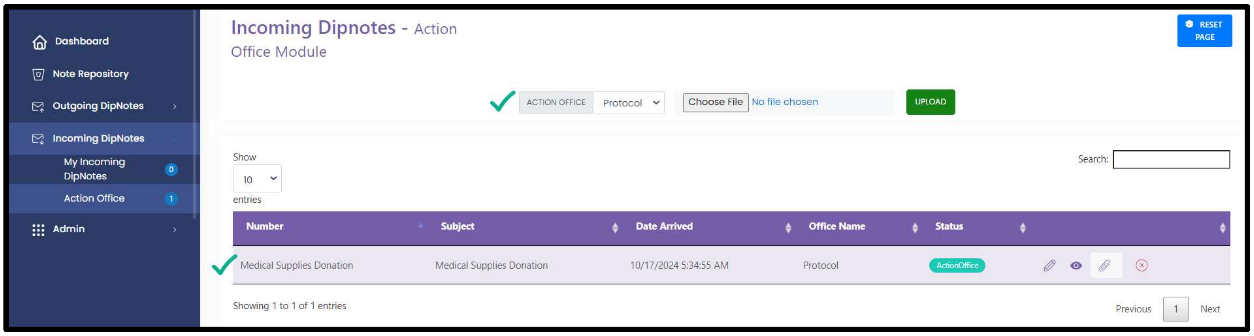


Figure 2. The Action Office Incoming DipNotes screen

Multi-role posts are typically bigger embassies which will have different offices assigned as **Receiver** (i.e., Mailroom), **Distributor** (i.e., Protocol), and **Action Office**.

LOGGING INTO DIPNOTES

There are two options to logging into the **DipNotes** application. One way is to copy and paste this hyperlink into your Web browser: https://dipnotes.state.gov/. The other way is navigating to the **OKTA** dashboard (https://state.okta.com) and click on the ***ADG DipNotes*** tile.

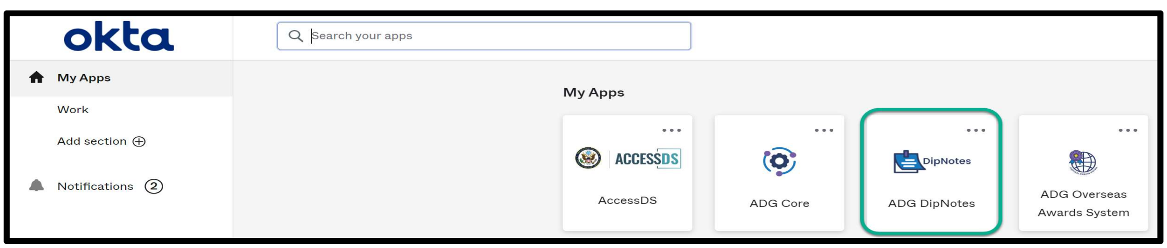


Figure 3. OKTA Dashboard with the ADG DipNotes tile

Upon logging in, the ***DipNotes Disclaimer*** popup window will appear. Click on **Accept** and you will be taken to the landing, or homepage of the application.

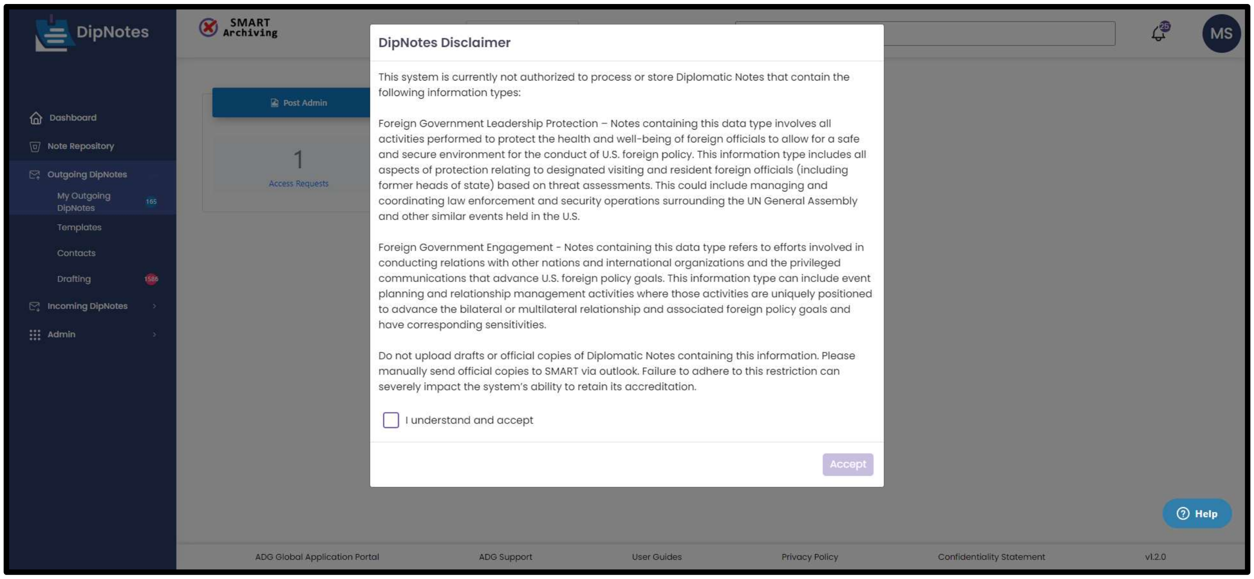


Figure 4. The DipNotes Disclaimer pop-up window

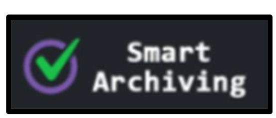
Navigating the DipNotes User Interface

Header

At the top of the homepage is the header. The header contains the following features, starting from left to right:

- The ***DipNotes*** logo – click on this logo to navigate to the homepage.
- The ***Your Post*** drop-down menu. Your default post will appear first, however, if you manage more than one post at a mission, then you will be able to select the different posts in this drop-down menu.

- The ***SMART Archiving*** green checkmark is a visual indicator that you are connected to the **DipNotes** application via OpenNet, GoBrowser, or GoVirtual <u>and</u> if you have an active SMART account.



- The ***SMART Archiving*** with a **red X** indicates either:
  - You are <u>not</u> connected via **OpenNet**, **GoBrowser**, or **GoVirtual**.
  - You are connected via **OpenNet, GoBrowser,** or **GoVirtual** but do not have an active SMART account.

- The ***Search*** textbox allows you to search all incoming and outgoing diplomatic notes within the mission, including contents of the attachment(s).
- The circular badge with your initials allows you to access your profile settings. There are three tiles in your profile settings:
  - ***My Profile*** – You can view your default profile settings, such as your office, any groups to which you belong, and your role(s) within **DipNotes**. You can also set your email and system notification preferences, as well as request access to user groups at your Post.
  - ***Notifications*** – System notifications and alerts will appear here for you to read.
  - ***Logout*** – click on this tile to log out of the **DipNotes** application.

Left Menu Panel

The left menu panel displays the menu options available to users. The menu options displayed are permission driven or based on your role(s) within the application. The below image is what a drafter would typically see on their left menu panel.

- ***Dashboard*** – To return to the homepage, click on the ***Dashboard*** option.
- ***Note Repository*** – A list of incoming and outgoing diplomatic notes is stored here.
- ***My Outgoing DipNotes*** – As a drafter, your list of outgoing diplomatic notes, regardless of status, is displayed on the ***My Outgoing DipNotes*** page. Within the ***My Outgoing DipNotes***, you can access your templates, contacts, and drafts of your diplomatic notes. The badge with the number to the right of **My Outgoing DipNotes** indicates the number of diplomatic notes waiting for a message reference number, or **MRN**.
- ***My Incoming DipNotes*** – A list of incoming diplomatic notes, regardless of status, is displayed on the ***My Incoming DipNotes*** page. Those users with the role of **Receiver**, **Distributor**, **Action Office**, or **Info Group** will have access to the ***My Incoming DipNotes*** menu option.

Figure 5. Left menu panel

DASHBOARD

The **Dashboard** is a visual overview of diplomatic notes by status. Again, depending on your user role(s) within the application, you might see more, or different tiles on the **Dashboard**.

Figure 6. Dashboard of a user with Outgoing and Incoming Roles

FOOTER AREA

The **Footer** area contains a description of the **DipNotes** application, version, hyperlinks to the ADG Product Catalog, user guides, as well as the ADG support email address (ADG-Support@state.gov).

Figure 7. Footer area

Help Widget

On the **Dashboard**, in the lower right-hand corner, is the **Help** widget. When you click on ***Help***, a ***Help*** panel appears. Type in the term in the ***Search*** field, press the ***Enter*** key, and the widget will bring up help articles related to your search term.

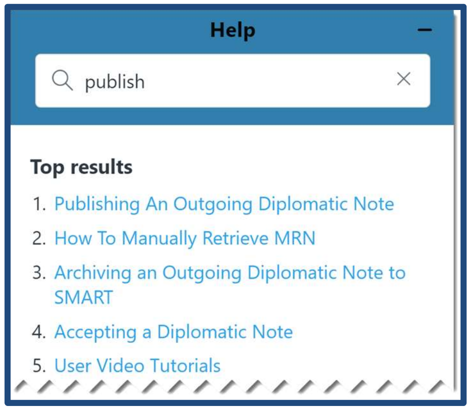


Figure 8. Help Widget

Click on one of the help articles and more details and instructions will be displayed. The pop-out icon to the right of the article title will navigate you to the ADG Support website where you can read the article on a full screen.

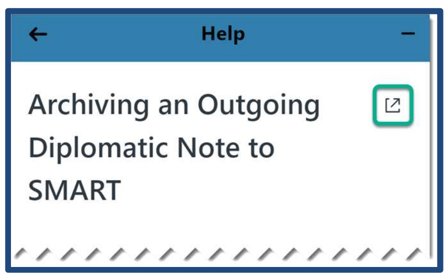


Figure 9. Pop-out icon to navigate to the full article

Overview of the Process Flow in DipNotes

Outgoing DipNotes are diplomatic notes sent from the U.S. Embassy to the host nation, other foreign embassies, or international organizations.

Flow of an Outgoing Diplomatic Note

An outgoing diplomatic note starts with the **Drafter**. The figure below is a flowchart of an outgoing diplomatic note.

First, the **Drafter** creates the diplomatic note, which can be drafted from an existing template. The **Drafter** designates a classification, as well as other pertinent information, such as the recipient, the office to which it belongs, and marking the diplomatic note with having PII in it, if applicable.

Then, the draft can be saved, at which point the system will assign a *DipNote Number* to the diplomatic note. The drafter may also edit the SMART tags that are automatically set in the application. Linking past diplomatic notes and attaching other related documents can be done by the drafter before publishing the diplomatic note. Additionally, the application performs an OCR action that parses each word in every document uploaded by the user, which will include the documents when searching for a particular keyword.

If a draft copy is uploaded, the **Drafter** must attach the stamped and signed official copy of the diplomatic note to be able to publish the note. When publishing a diplomatic note, the **Drafter** has the choice to update, publish, or publish and send an email.

When the **Drafter** is connected to the **DipNotes** application via ***OpenNet, GoDesktop,*** or ***GoVirtual***, then the system will upload the diplomatic note to SMART, attempting to also retrieve an MRN. The status of the diplomatic note changes to **PUBLISHED**.

If the **Drafter** is using the **DipNotes** application in a web browser, <u>*without*</u> being connected to ***OpenNet, GoDesktop,*** or ***GoVirtual***, then the automatic uploading to SMART will not occur. The status of the diplomatic note will be **PUBLISHED**, after which the **Drafter** will have the option to update the archive to SMART and retrieve the MRN when connected to ***OpenNet, GoDesktop, or GoVirtual***. Otherwise, the drafter can enter the MRN manually. In addition, attaching documents can still be done – see Figure 10 on the following page.

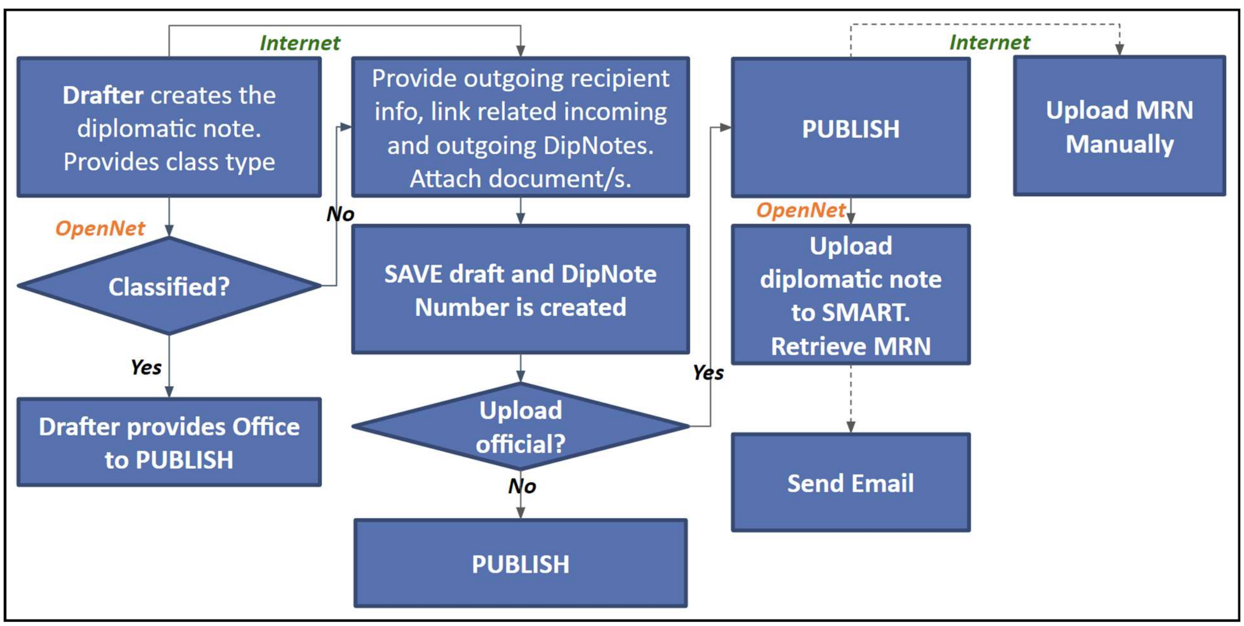


Figure 10. Flowchart of an outgoing diplomatic note

Flow of an Incoming Diplomatic Note

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

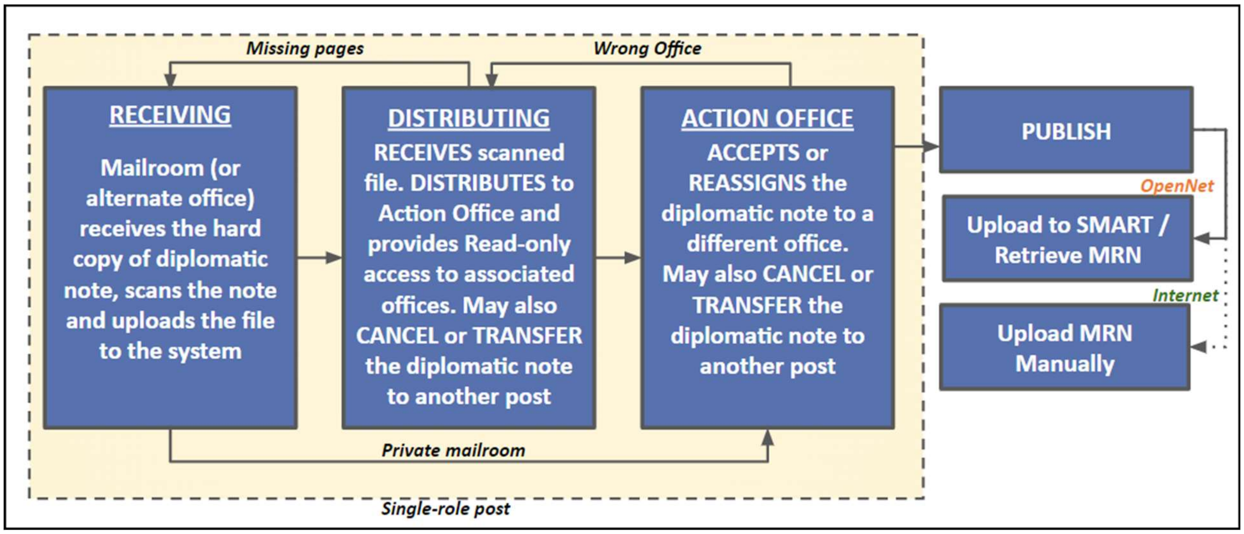


Figure 11. Flowchart of an incoming diplomatic note

The **Receiver** will 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 has the **Private Mailroom** enabled, the scanned file will be forwarded directly to the **Action Office's** queue for action.

The **Distributor** reviews the diplomatic note and has a few actions they can take. The **Distributor** may reject the diplomatic note back to the **Receiver** or cancel the diplomatic note (the information remains in the system and the diplomatic note number will not be reused). The **Distributor** may also 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**, which can view the diplomatic note.

The **Action Office** may accept the diplomatic note for further action. They may also reject the diplomatic note, which will then route back to the distributor, wherein the **Distributor** can forward the diplomatic note to a different office. The **Action Office** may also reassign the diplomatic note to an office within a mission or transfer to another post.

The Outgoing Process of a Diplomatic Note

Users with the role of **Drafter** are responsible for drafting, publishing, and archiving a diplomatic note to SMART. A **Drafter** also manages the document templates used in drafting a diplomatic note, as well as the contact information of outside organizations.

The dashboard of a **Drafter** is a visual overview of the number of outgoing diplomatic notes, categorized by statuses ***Published*** and ***Drafting***. In this example below, when you hover over the different colored parts of the circle, it will indicate how many diplomatic notes are in the status of published and how many are in the drafting stage.

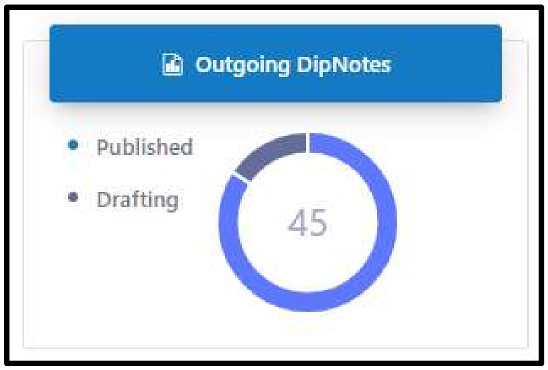


Figure 12 Outgoing DipNotes tile on the Dashboard

In the left menu panel, there are three menu options typically available for the **Drafter** to choose: ***Templates***, ***Contacts***, and ***Drafting***. The circular badge to the right of ***My Outgoing DipNotes*** indicates the number of all diplomatic notes pending retrieval of an MRN. To the right of the ***Drafting*** menu option, the circular badge indicates how many diplomatic notes are in the drafting stage.

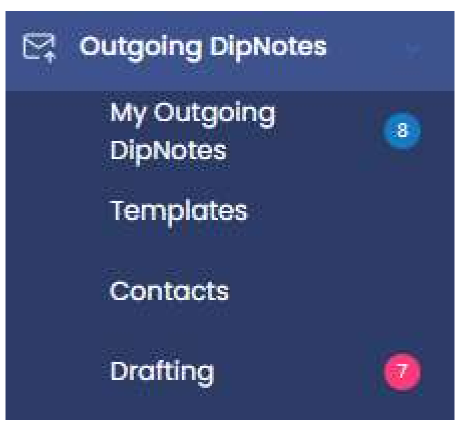


Figure 13. Outgoing DipNotes menu

From the **Drafter** dashboard, the user will have access to the ***Templates***, ***Contacts*** and ***Drafting*** menu options.

The **Templates** menu option is a repository of all template documents that can be uploaded, downloaded or edited by the drafter. It can also be used and shared by other drafters across the mission.

The **Contacts** menu option, on the other hand, is a repository of all external contacts of the mission. The contact information can be viewed and referenced when drafting a diplomatic note.

DRAFTING A DIPLOMATIC NOTE

There are two places where you can start drafting a diplomatic note. The first way is to click on the **Drafting** menu option, under **My Outgoing DipNotes** section in the left menu panel. The second way is to click on **Drafting** on the **Outgoing DipNotes** tile on the Dashboard.

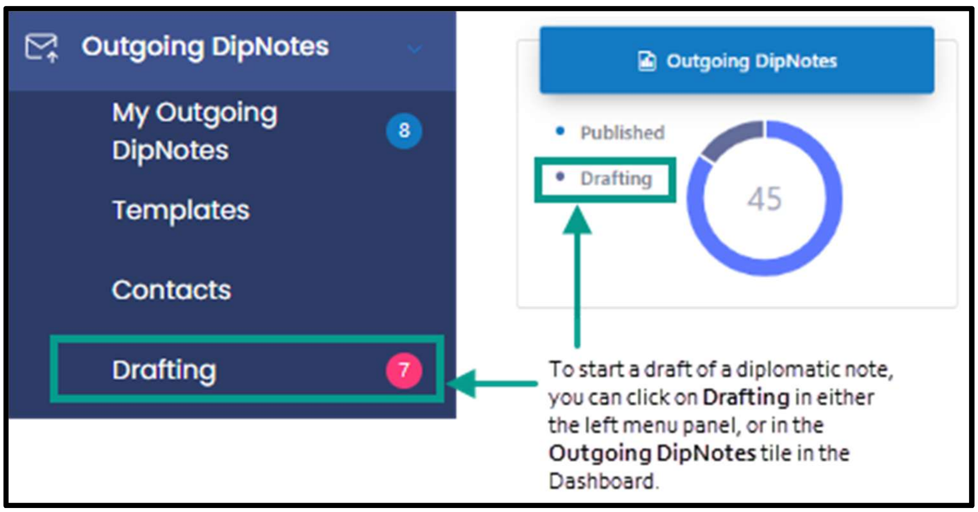


Figure 14. Two starting points to begin drafting a diplomatic note

STEPS TO START A DRAFT OF A DIPLOMATIC NOTE

1. From the **Dashboard**, in the left menu panel, click on the ***Drafting*** menu option under the **Outgoing DipNotes** section. You will be taken to the ***Drafting*** screen.

2. On the ***Drafting*** screen, click on the **green** button ***ADD NEW OUTGOING DIPNOTE*** and you will be taken to the ***Add New Outgoing DipNote*** screen – see Figure 15.

3. At the ***New Outgoing DipNote*** screen, you will enter the relevant and required fields. The required fields are denoted by a **red** asterisk (*). The fields on this screen are as follow:

- **Templates:** – You can choose from the list of templates by clicking on the ***Select available template to use*** drop-down then clicking on the ***Download Selected Template*** link.
- **DipNote Classification:** * – Click on the drop-down arrow to choose the classification for this diplomatic note. The three choices are *Unclassified, Sensitive but Unclassified*, and *Classified*.
- **Office Owner:** * – Click on the drop-down arrow to choose the office to which this diplomatic note belongs.
- **Outgoing Recipient:** * – Choose from the drop-down list an outgoing recipient. These contacts are from the **Contacts** module added in **DipNotes**.
- **Send Date:** * – Select the date using the Calendar tool.
- **Subject:** * – Type the subject of the diplomatic note.
- **Summary:** * textbox – Type a summary of the diplomatic note in this textbox.
- **Include PII:** – Check this box if the diplomatic note contains PII. When the checkbox is checked, then the system will bring up a list of **Action Offices** from which you will choose. The Action Offices chosen will be able to see the PII. Use the **CTRL** key to choose offices not right next to each other.

Figure 15. PII checkbox and Action Offices selection

Checking the Include PII checkbox automatically adds ***SENSITIVE*** as a **Caption**.

- **Captions:** * – Captions are used to meet specific internal dissemination and sorting requirements at Main State Messaging Center (MSMC) and at posts abroad. Click on the **blue** ***add here*** link to view the list of captions available. From the **Add SMART Captions** window, select the applicable captions and click on the **blue** ***ADD SELECTED CAPTIONS*** button
  - The system automatically adds the caption **SENSITIVE** for diplomatic notes that has ***Sensitive But Unclassified*** classification
  - The system also automatically adds the caption **SENSITIVE** for diplomatic notes marked as PII.
- **Uploaded Draft Note:** – Click on the **purple** ***Upload Draft Note*** link to upload your draft.
  - You will see a message about certain information the system currently will not store or process. At the bottom of this message window click on the ***Choose File*** button. Locate your draft and click on the ***Open*** button to upload your draft.

- The system will accept the following file extensions: *.jpeg, *.jpg, *.png, *.docx and *.pdf files

- **Additional Attachments:** – Click on the **purple** ***Upload Additional Attachments*** link to attach any supplemental files to this diplomatic note.
  - You will see a message about certain information the system currently will not store or process. At the bottom of this message window click on the ***Choose File*** button. Locate your draft and click on the ***Open*** button to upload your attachment.
  - The system will accept the following file extensions: *.jpeg, *.jpg, *.png, *.pdf and *.xlsx.

- **Link Outgoing DipNote:** button – To link an existing **outgoing** diplomatic note that may be related or you would like to reference to this note, click on the ***Link Outgoing DipNote*** button.
  - The ***Search Outgoing DipNotes*** window will be displayed – find the outgoing diplomatic note and click on the **purple** ***Select*** button.

- **Link incoming:** link – To link an existing **incoming** diplomatic note that may be related or you would like to reference to this note, click on the ***Link Incoming DipNote*** button.
  - The ***Search Incoming DipNotes*** window will be displayed – find the incoming diplomatic note and click on the **purple** ***Select*** button.
  - The linked diplomatic note numbers will appear. The red garbage icon allows you to delete the linked diplomatic note. You can link more than one diplomatic note.

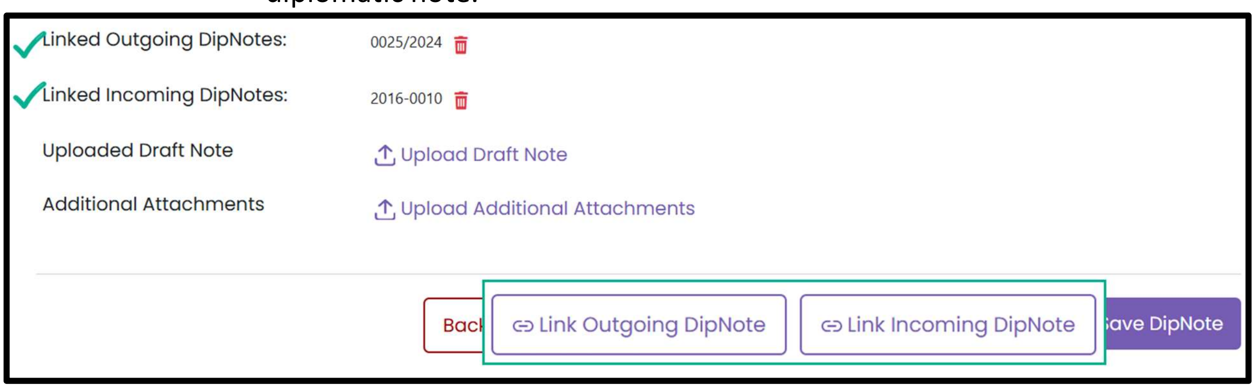


Figure 16. Option to link incoming and outgoing diplomatic notes

- When you've completed all the required fields and relevant information, click on the **purple** ***SAVE DIPNOTE*** button. After saving the draft, the system will assign a **DipNote Number**.

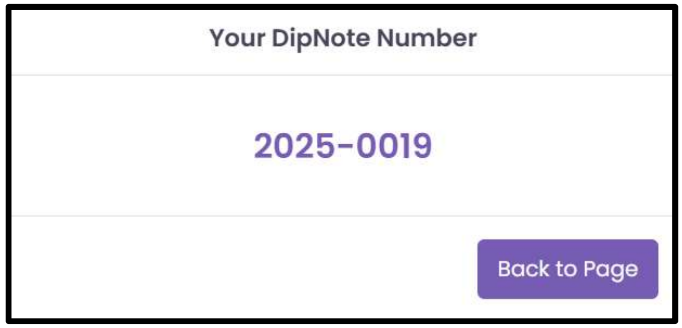


Figure 17. Your DipNote Number window

- Click on the **purple** **Back to Page** button to return to the **Drafting** screen.

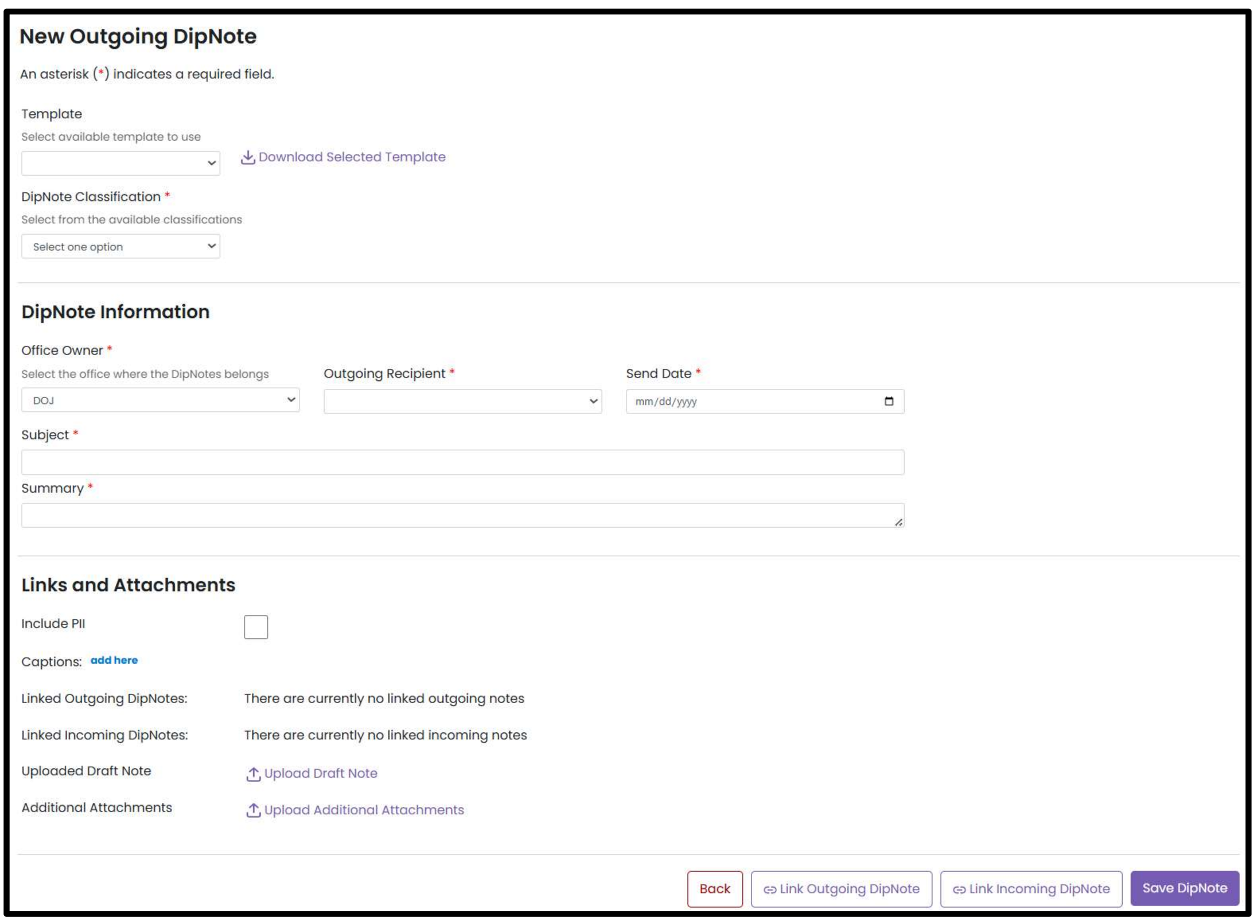


Figure 18. New Outgoing DipNote screen

Default dipnote number format is **YYYY-XXXX**. However, post may request to ADG to change the DipNote number format during the deployment process.

EDITING A DIPLOMATIC NOTE

Once you have saved a draft of your diplomatic note, you can return to it and make edits, or changes to the draft.

STEPS TO EDIT A DIPLOMATIC NOTE

1. On the **Dashboard**, click on the ***Drafting*** menu option under the **My Outgoing DipNotes** section. The ***Drafting*** screen will appear, and you will see a list of all the drafts you've created.

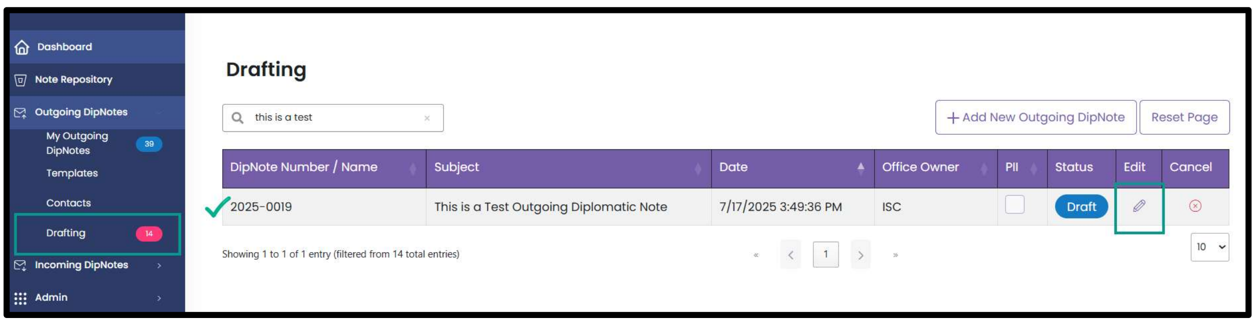


Figure 19. The Drafting screen, with an option to edit the diplomatic note

2. Click on the pencil icon in the far right side to start making edits to the draft. Once you see the page ***Editing DipNote Number / Name: <YYYY-XXXX>***, you can start making edits.

Note the ***Office Owner***, ***DipNote Number/Name***, and ***Status*** fields are grayed out. Changes to these fields cannot be made.

3. **SMART Tags** are automatically set by the system. You may delete a tag by hovering over the tag and clicking on the trash bin. You may also add more tags by clicking on the **blue *add here*** link.
4. **Remarks** users can add their remarks at any point during the diplomatic note process.
5. Once you have finished making edits, there are three options at this point: *Update, Publish Only,* or *Publish And Send By Email*
   - ***UPDATE*** – Click on the ***UPDATE*** button when you want to save the changes you've made to the draft.

- ***PUBLISH ONLY*** – When clicking this button, the diplomatic note's status is updated to "PUBLISHED." If user is connected via ***OpenNet, GoVirtual*** *or* ***GoDesktop*** and has an active SMART account, the application automatically connects to the SMART Server, upload the documents and retrieve the MRN. Otherwise, if connected via the Internet or DIN, the diplomatic note's status will be updated to "PUBLISHED."
  NOTE: The user can always come back and archive the diplomatic note to SMART (if connected via OpenNet) or manually enter the MRN (If the dipnote was archived outside or the directly from the SMART website)
- ***PUBLISH AND SEND BY EMAIL*** – This will redirect the user to the ***Sending Email*** page that contains the email draft of the note. The user may edit the recipients, subject, body and attachments. Once the user clicks on "PUBLISH," the diplomatic note's status is changed to "PUBLISHED." If user is connected via ***OpenNet, GoVirtual*** *or* ***GoDesktop*** and has an active SMART account, the application automatically connects to the SMART Server, upload the documents and retrieve the MRN.
- ***VIEW HISTORY OF DIPNOTE***
- ***BACK TO PAGE*** – Click on the **red** ***BACK TO LIST*** button to return to the **Drafting** screen. Any edits in the editable fields will be discarded, however, if you've linked an outgoing or incoming diplomatic note to this draft, then those links will be saved regardless.

UPLOADING THE OFFICIAL DIPLOMATIC NOTE

Once you've finished drafting a diplomatic note, you are then required to up upload the **official**, **signed**, or **stamped** copy of the diplomatic note to publish it.

STEPS TO UPLOAD A DIPLOMATIC NOTE

1. Attach the diplomatic note. On the ***Editing DipNote Number / Name: <YYYY-XXXX>*** screen, click on ***Official*** link next to ***Files Attached to this DipNote:***

Figure 20. Official link to upload the official diplomatic note

2. Next click on the ***Choose Files*** button at the bottom left corner in the warning pop-up window.

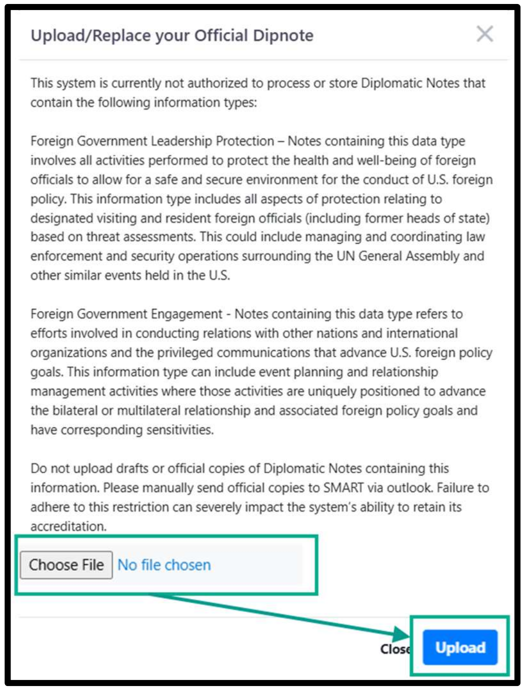


Figure 21. Upload your Attachment(s) screen

3. Locate the file and click on the ***Open*** button.
4. Back at the warning pop-up window, click on the **blue** ***Upload*** button in the bottom right-hand corner.

To upload, or attach relevant documents to this diplomatic note:

1. Next to ***Files Attached to this DipNote:*** click on the ***Attachments*** link.
2. Click on the ***Choose Files*** button in the warning pop-up window.
3. Locate the file and click on the ***Open*** button.
4. Back at the warning pop-up window, click on the **blue** ***Upload*** button in the bottom right-hand corner.

The attachment(s) should now appear on the ***Editing DipNote Number / Name: <YYYY-XXXX>*** screen.

Publishing a Diplomatic Note

The official diplomatic note is now attached, you will now have two options to publish the diplomatic note:

Figure 22. Different options available for the diplomatic note

The Publish Only Option

This option will change the diplomatic note's status to *Published*.

- Connected via **OpenNet**, **GoDesktop**, or **GoVirtual** and <u>with</u> an active SMART account: The **DipNotes** application connects to the SMART Server and uploads the diplomatic note. The MRN is retrieved and saved into **DipNotes** – see Figure 23.

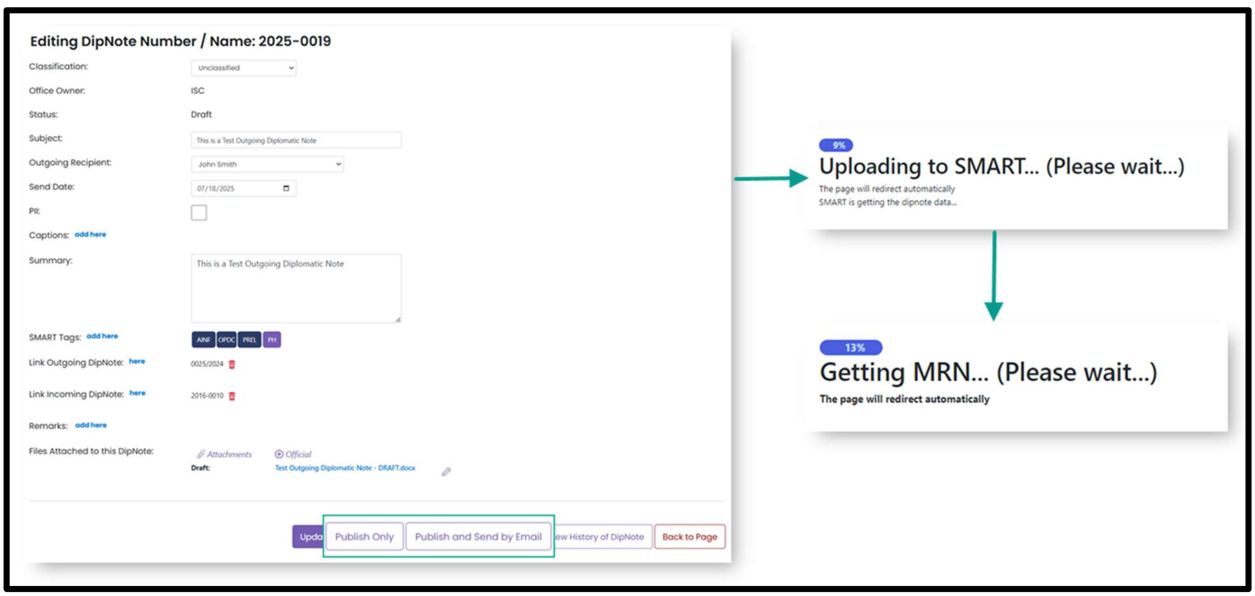


Figure 23. Uploading to SMART and MRN retrieval

- Connected via **OpenNet**, **GoDesktop**, or **GoVirtual** and <u>without</u> an active SMART account: The status of the diplomatic note will change to *Published*, the application will not connect to the SMART Server and the MRN will not be retrieved nor saved into **DipNotes**.
- Connected <u>without</u> being on **OpenNet**, **GoBrowser**, or **GoVirtual**: The status of the diplomatic note will change to *Published*, but the MRN will not be retrieved nor saved into **DipNotes**.

The Publish and Send by Email Option

When you choose the option to ***Publish and Send by Email***, you will be redirected to the ***Compose Email*** page. The **From** field will display the post's mailbox that is requested from and configured by post DT. The **To** field will display the email address of the external contact selected. You may also add more recipients from your Contacts Repository by clicking on the ***Search*** or magnifying glass button. The **CC** field will display the email address of the drafter. You may add more recipients in the text field to the right of the **CC** dropdown field, if the email address's domain ends with ".gov." The user may edit the **Subject**, and **Body** fields. The attachment will only include the official copy of the diplomatic note, as well as the other documents uploaded in the **Email Attachments** field, if there is any. You will have the option to include the attachments or otherwise.

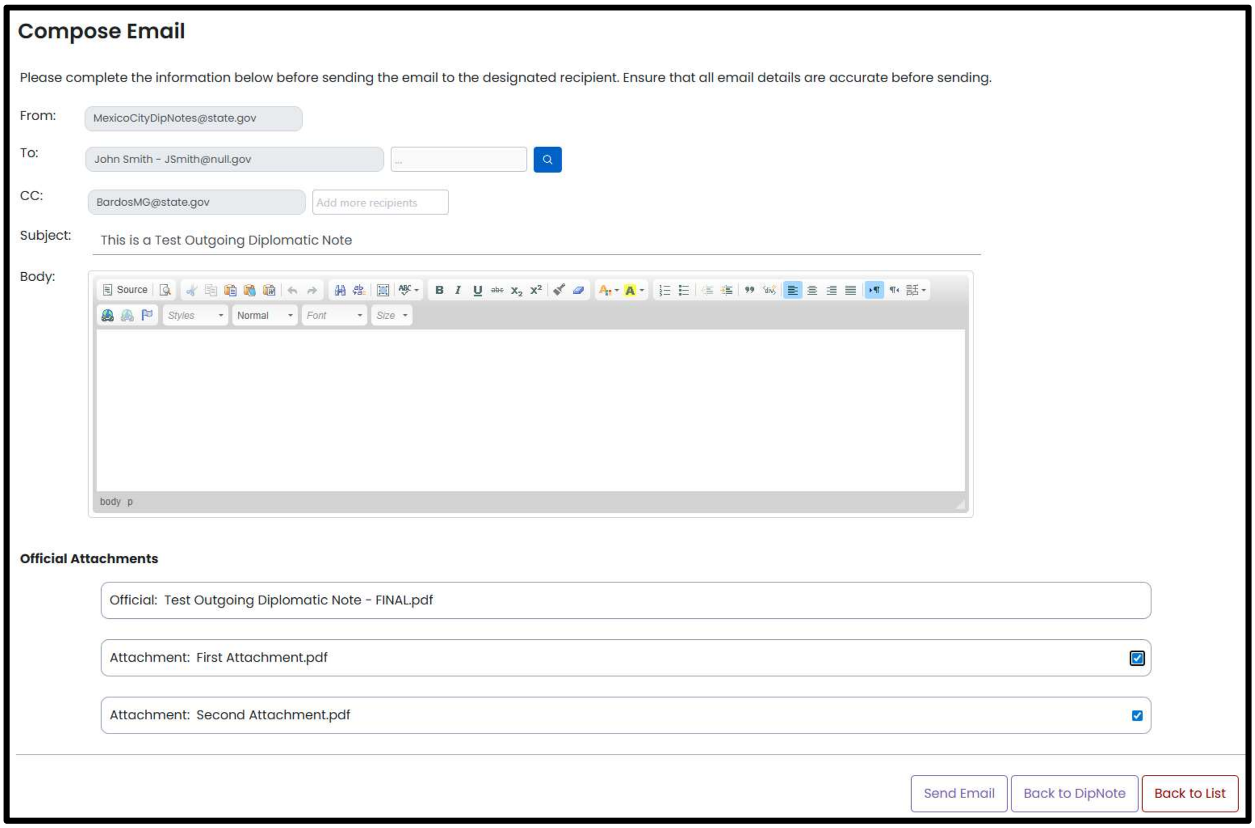


Figure 24. The Compose Email screen

Once you click on the green **Send** button, the status of the diplomatic note changes to **Published**. If you are connected via OpenNet, GoVirtual or GoDesktop and have an active SMART account, the system will do the SMART archiving process and attempt to retrieve the MRN. At this point, no further changes to the diplomatic note will be allowed. Otherwise, the status of the diplomatic note remains as **DRAFT**.

> The user is required to upload the official/signed/stamped version of the DipNote if a **draft copy** was uploaded to successfully **PUBLISH** the outgoing diplomatic note.

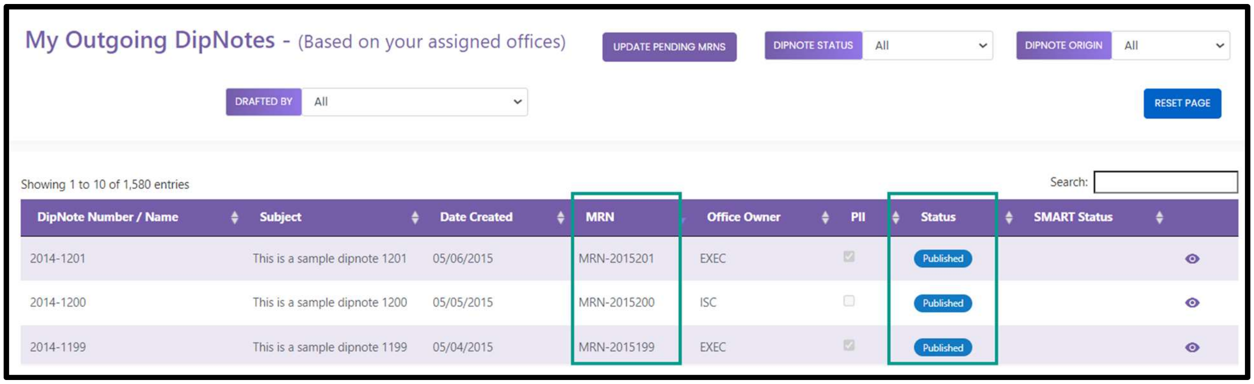


Figure 25. A diplomatic note in the Published status, including the MRN

Publishing a Classified Diplomatic Note

When drafting a diplomatic note and its classification is ***Classified***, you will only be required to provide the office owner of the note. You will also receive a warning message in a gray banner stating *This DipNote has been marked as **CLASSIFIED***. User cannot add any other information since classified information should not be processed outside ClassNET. The idea is to be able to assign a dipnote number for this classified diplomatic note.

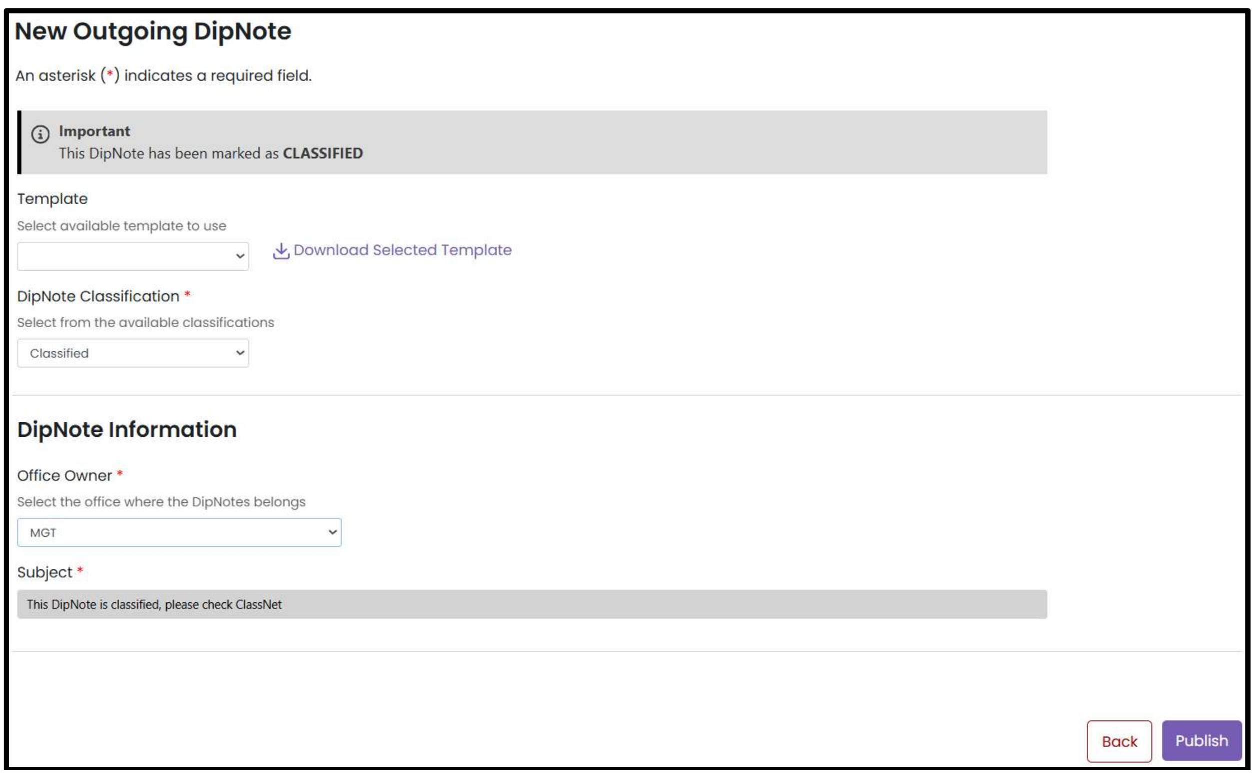


Figure 26. Gray banner labeled, The DipNote has been marked as CLASSIFIED

Archiving a Published Diplomatic Note

When the drafter publishes the diplomatic note, the application automatically connects to the SMART server and attempt to archive the note if the following conditions are met:

1. The user is connected via OpenNet, GoVirtual or GoDesktop; AND
2. The user has an active SMART account

Otherwise, if the user is connected to the DIN; or if the user is connected via OpenNet network but does not have an active SMART account, the diplomatic note's **Status** will change to ***PUBLISHED*** and **SMART Status** as ***SMART Pending,*** which means the note has not been archived to the SMART Server.

The drafter may always go back to the application and try to publish note to SMART.

Steps to Archive a Diplomatic Note

On the **My Outgoing DipNotes** screen, locate the diplomatic note with **Status *"PUBLISHED"*** and **SMART Status "*SMART PENDING*"**. Click on the eye icon in the far right of the diplomatic note row to view the details.

In the **DipNote Number: <YYYY-####>** page, locate the MRN field and click on the **Archive to SMART** button.

This action will trigger the application to connect to the SMART Server, archive the note and retrieve the MRN.

Alternatively, the user may manually enter the MRN in the designated textbox if an attempt to archive the note directly through the SMART Server or website and an MRN was retrieved.

Figure 27. ARCHIVE TO SMART button in the DipNote YYYY-XXXX screen

When connected via OpenNet, GoVirtual or GoDesktop:

If an official note is attached: The Drafter or Post Administrator may choose to archive the note to SMART or manually enter the MRN.
If there is no official attachment: The only available option will be manual MRN entry by the Drafter or Administrator.

Retrieving the MRN for a Diplomatic Note

When you are connected to the **DipNotes** system via OpenNet, retrieval of the MRN is done automatically when the diplomatic note is published.

If SMART is unable to successfully return an MRN, The **Status** of the note will be ***PUBLISHED*** with **SMART Status *"MRN Pending"***. The **Drafter** may go back and attempt to retrieve the MRN.

Steps to Retrieve an MRN

1. From the left menu panel, click on the **My Outgoing DipNotes** to view the published diplomatic notes which do not have an MRN.

2. Select the diplomatic note for which you want to retrieve the MRN. From the list, the **Status** should be ***Published*** and the **SMART Status** should be ***MRN Pending***. Click the **View/Eye** icon.

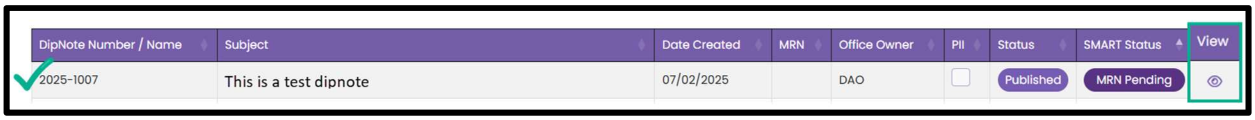


Figure 28. View/Eye icon to view the diplomatic note

3. If connected via OpenNet, GoVirtual or GoDesktop, the application automatically connects to the SMART Server and attempt to retrieve the MRN.
4. If successful, the application will redirect the user to the DipNotes information page including the MRN.

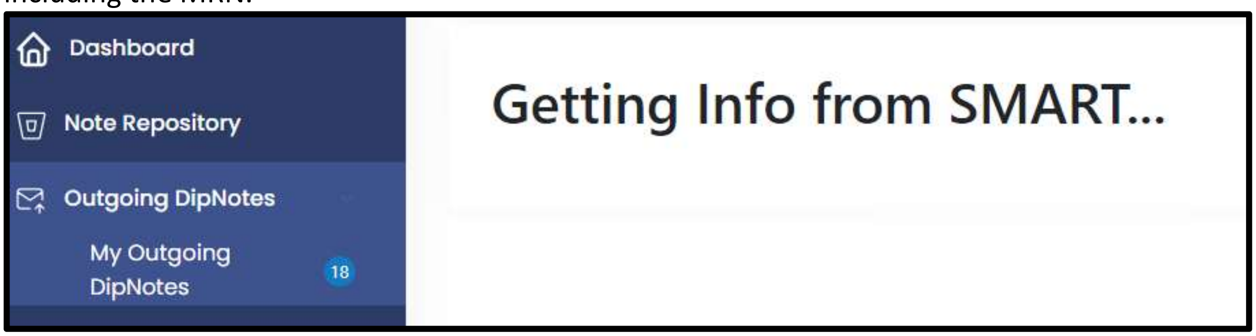


Figure 29. The application connecting to the SMART Server

5. If the retrieval of MRN is not successful or if the user is connected via DIN/Internet, On the **Viewing Outgoing DipNote [YYYY-NNNN]**, click on the **purple *Archive to SMART*** button to restart the archival process.

   If the user already has already archived the diplomatic note directly to the SMART Server or from a different website and was able to retrieve the MRN, they may type the MRN in the text field and click on the **gold UPDATE MRN MANUALLY** button

Figure 30. Options in retrieving MRN

On the **Outgoing DipNotes** screen, you will see the MRN listed under the ***MRN*** column – see Figure 30.

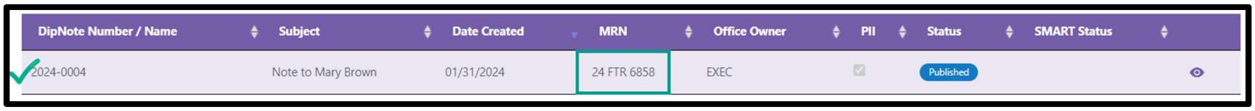


Figure 31. MRN is uploaded into the system and the MRN appears under the MRN column

BULK RETRIEVAL OF MRNS

If you have multiple diplomatic notes that have **SMART Status *MRN Pending***, you may use the **UPDATE PENDING MRN** button. This action will attempt to retrieve the MRN of all incoming and outgoing notes that have status MRN Pending at once. This button is available in both **My Incoming** and **My Outgoing** main pages.

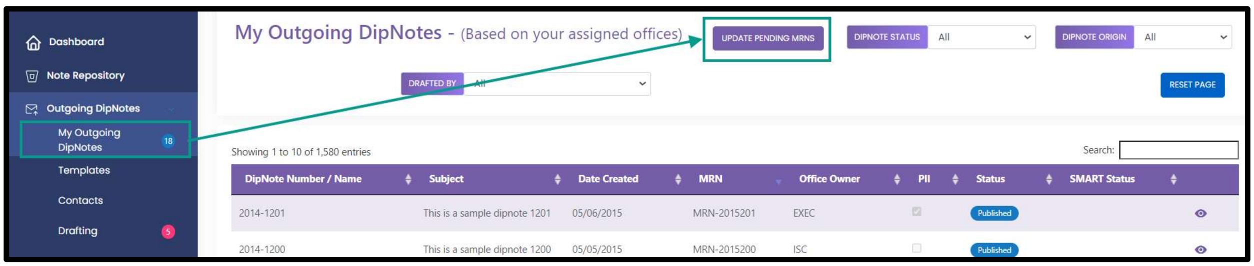


Figure 32. UPDATE PENDING MRNS button

FAQ: What if the drafter does not have access to OpenNet or does not have a SMART Account?

If the current drafter does not have access to OpenNet or does not have an active SMART account, they may ask the post administrator or a fellow drafter from their section who is connecte via OpenNet, GoVirtual or GoDesktop and has an active SMART account to publish and archive the note on their behalf.

REVERTING A CANCELLED DIPLOMATIC NOTE

The Post Admin can revert a cancelled diplomatic note, or “un-cancel” it. The user will make a request to the Post Admin, to revert a cancelled diplomatic note back to its previous state. Both the incoming and outgoing cancelled diplomatic note can be reverted to its previous state as long as the diplomatic note has not been archived to the SMART Server.

Reverting a Published Diplomatic Note Back to Draft Status

The Post Admin can revert a published diplomatic note back to Draft status as long as the diplomatic note has not been archived to the SMART server. The user will make a request to the Post Admin, to revert a published note back to its previous state.

Print Information on an Outgoing Diplomatic Note

1. On the left menu panel, Under **Outgoing DipNotes**, click on the ***My Outgoing DipNotes*** option.
2. On the ***My Outgoing DipNotes*** screen, locate the diplomatic note you want to print, then click on the "eye" icon in the far-right **column**.
3. On the viewing screen, towards the bottom, click on the **blue** ***PRINT*** button.

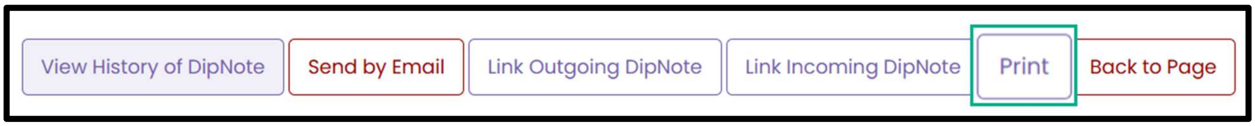


Figure 35. The PRINT button on the viewing screen

4. The ***Print*** screen will appear in a different browser tab or window. Click on the ***Print*** button to print the information of the chosen diplomatic note.

For printing information of an incoming diplomatic note, Go to ***My Incoming DipNotes*** menu option under **Incoming DipNotes** in the left menu panel. Locate the diplomatic note from the list and click on the View/Eye icon. In the *DipNote Number/Name: <subject>* page, click on the Print icon on the upper right corner of the page.

Figure 36. The PRINT button on the viewing screen of an incoming diplomatic note

TEMPLATES

Drafters can use templates to start drafting a diplomatic note. Templates can be uploaded into the **DipNotes** application by users with the **Drafter** or **Post Admin** role. The templates are located under the **Outgoing DipNotes** section on the left menu panel. Templates that are downloaded will appear as an option to use when drafting a diplomatic note.

On the **Templates** screen is the list of templates uploaded by the **Drafter** or **Post Admin**. The following information and features are on the **Templates** screen:

- **File Name** – Lists the file name of the template.
- **Description** – A short description of the template.
- **Office Owner** – Indicates the owner of the template.
- **Uploaded By** – The user's name who uploaded the template.
- **Date Uploaded** – The date the template was uploaded.
- **Download** icon – Click on the ***Download*** icon to download the template.
- **Edit** icon – Click on the pencil icon to change the description, office owner, and the template document itself.
- **Trashcan** icon – Click on the trashcan icon to delete the template. DipNotes will ask you to confirm the deletion.

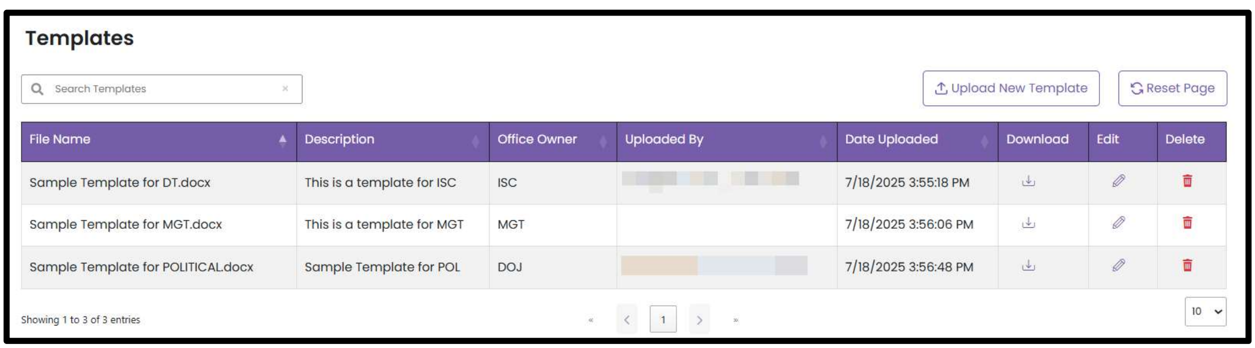


Figure 37. The Templates main page

STEPS TO UPLOAD A TEMPLATE

1. Under the **Outgoing DipNotes** section in the left menu panel, click on the **Templates** menu option. You will be at the **Templates** screen.
2. At the **Templates** screen, click on the ***UPLOAD NEW TEMPLATE*** button.

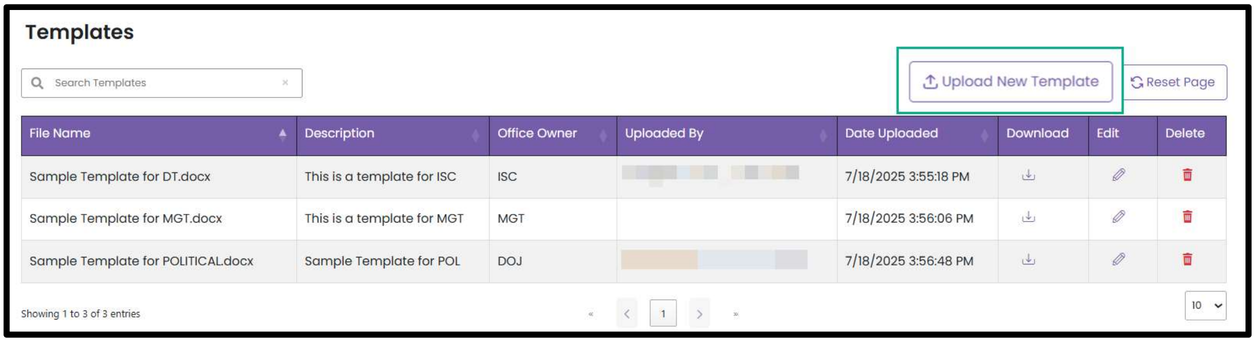


Figure 38. Upload New Template button on the Templates screen

3. At the **Template – Create** window, click on the ***Choose Files*** button. Locate the template you want to upload and click on the ***Open*** button. You will be taken back to the **Upload New Template** window.

Figure 39. Choose Files button on the Upload New Template screen

4. Under **Template Details** area, select the officer owner from the Template Office Owner drop-down menu.
5. Type a brief description of the template.
6. Click on the ***SAVE TEMPLATE*** button.

CONTACTS

The **Contacts** module is a shared repository among users in the **Drafter** role. A contact is a person from an outside organization who sends or receives a diplomatic note.

STEPS TO CREATE A CONTACT

1. Under the **Outgoing DipNotes** section in the left menu panel, click on the **Contacts** menu option. You will be at the **Contacts** screen.

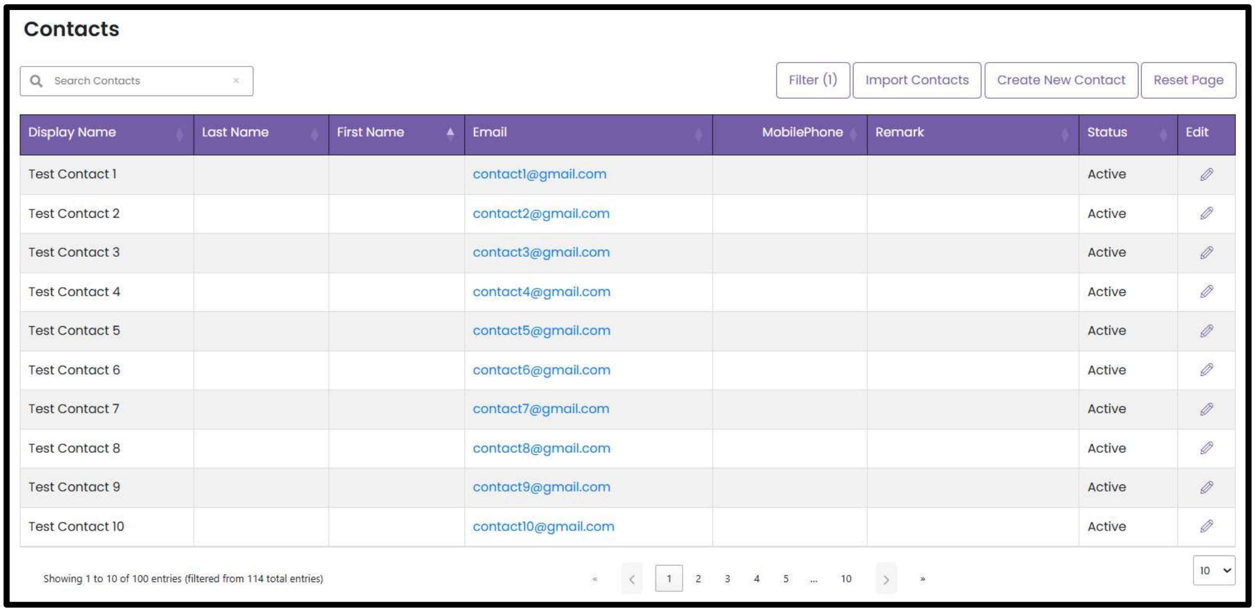


Figure 40. Contacts screen

2. Click on the ***CREATE NEW CONTACT*** button. You are now at the ***Create New Contact*** screen – see *Figure 41* below.

3. Enter all the relevant information. The ***Display Name*** and ***Email*** fields are the only required fields.

4. Click on the ***Save Contact*** button to save the contact. The ***Cancel*** button will return you to the **Contacts** screen and your contact will not be saved.

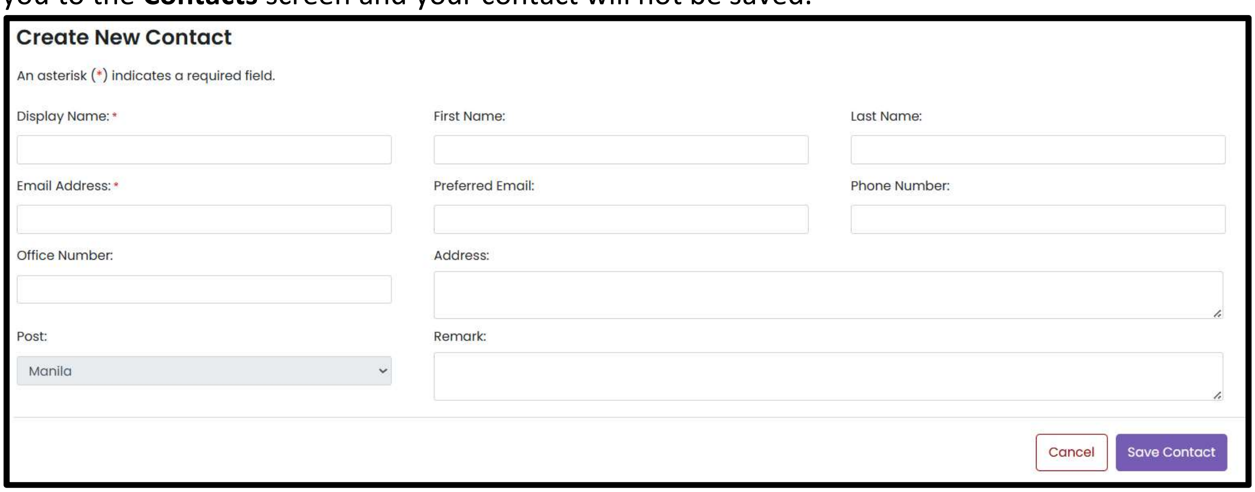


Figure 41. The Save and Back to List options on the Create New Contact screen

STEPS TO EDIT A CONTACT

1. Under the **Outgoing DipNotes** section in the left menu panel, click on the **Contacts** menu option. You will be at the **Contacts** screen.
2. Locate the contact you want to edit. In the far right-side on the contact's row, click on the pencil icon. You will be at the **Edit Contact** screen.
3. Notice now you have the **Status** drop-down list with two options: *Active* and *Inactive*. If this contact is no longer needed, set the **Status** to *Inactive* from this drop-down list.
5. Click on the ***Update Contact*** button to save your changes to this contact. The **C*ancel*** button will return you to the **Contacts** screen and any updates on your contact information will not be saved.

STEPS TO IMPORT CONTACT INFORMATION

Drafters and Post Administrators can now easily import external contact lists by doing the following steps:

1. Under the **Outgoing DipNotes** section in the left menu panel, click on the **Contacts** menu option. You will be at the **Contacts** screen.
2. Click the on the **Import Contacts** button. You will be on the **Import Contacts** screen.
3. Locate **Templates Available for you to use** and click on the **Contacts template**. This will download the **Template Contacts.xlsx**.
4. Complete the required fields in the template and save the file.
5. To upload, Locate **Upload your Excel template** and click the **blue** **SELECT YOUR TEMPLATE HERE** button.
6. In the **Upload Your Excel Template** window, click **Choose File**, locate your file and click **OPEN**.
7. Back in the **Import** Contacts screen, click on the **IMPORT CONTACTS** button.

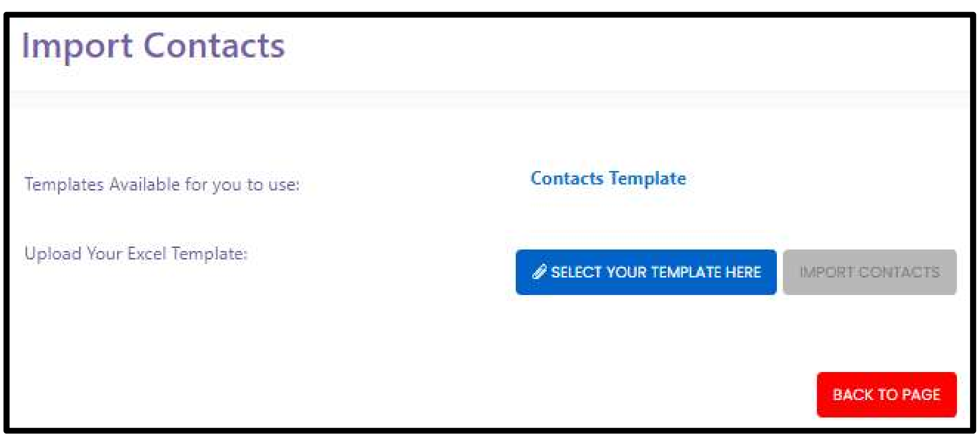


Figure 42. Import Contacts page

The Incoming Process of a Diplomatic Note

Offices granted with the Receiver role is responsible for scanning the physical diplomatic note coming from an outside organization and uploading the document into the **DipNotes** application.

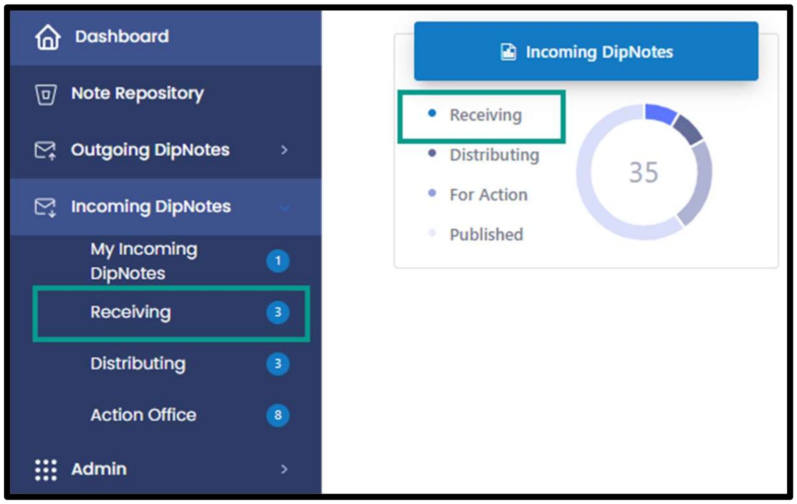


Figure 43. Receiving in the dashboard and left menu

A user with the **Receiver** role has the ***Receiving*** menu option in the left menu panel. In addition, the ***Incoming DipNotes*** tile is displayed in the **Dashboard** area.

The number badge next to the Receiving menu item displays the number of diplomatic notes that were returned by the Distributor and Action Office. These diplomatic notes are pending action from the Receiver.

RECEIVER ROLE: RECEIVING A DIPLOMATIC NOTE

Upon receiving the hard copy of the diplomatic note, the receiving office (e.g., IRM Mailroom) will scan and upload the document into **DipNotes**.

STEPS TO RECEIVE A DIPLOMATIC NOTE

1. On the left menu panel, under the **Incoming DipNotes** section, click on the ***Receiving*** menu option.
2. On the **Receiving DipNotes** screen, ***MAILROOM/RCVR*** is the office selected by default under **Office Receiver** drop-down list. *
3. Click on the ***Choose File*** button and select the appropriate file to upload.
4. On the **Receiving** screen, click on the **green** ***Upload*** button.

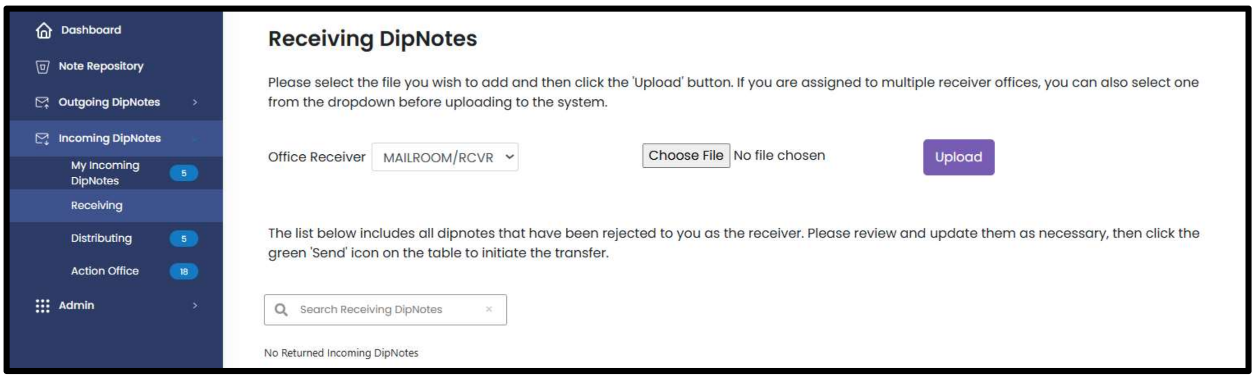


Figure 44. The Receiving screen

**Read Private Mailroom*

DISTRIBUTOR ROLE: DISTRIBUTING A DIPLOMATIC NOTE

The dashboard of the **Distributor** role contains a visual overview of the number of **Incoming DipNotes**, categorized by the statuses ***Distributing*** and ***Published*** – see Figure 42.

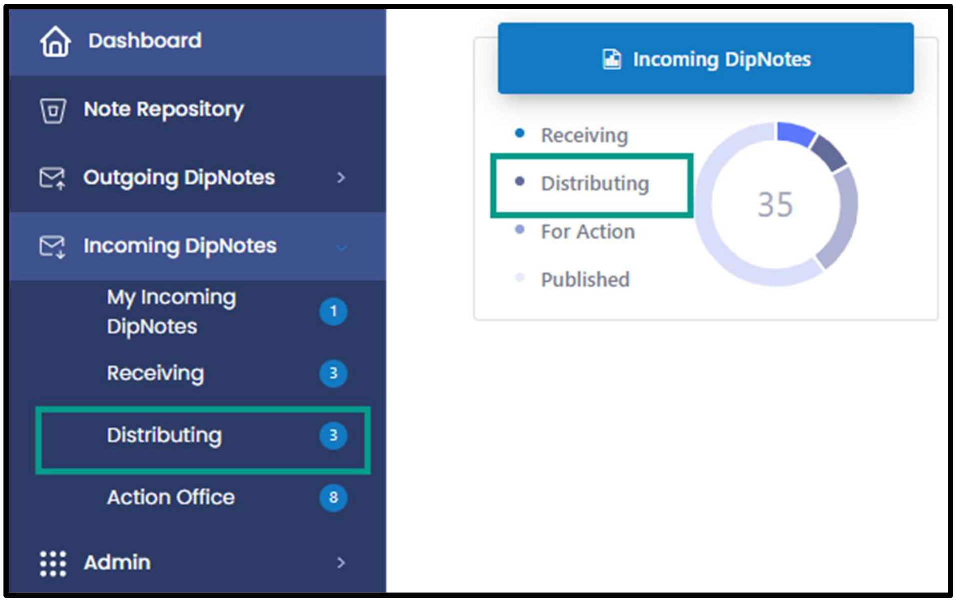


Figure 45. Distributing in the dashboard and left menu

Once the diplomatic note is uploaded by the **Receiver**, the note will automatically get routed to the **Distributor's** queue. The **Distributor** is responsible for reviewing the file uploaded by the **Receiver,** and forwarding the note to the appropriate office or ***Action Office***.

Steps to Distribute a Diplomatic Note

1. On the left menu panel, under the **My Incoming DipNotes** section, click on the ***Distributing*** menu option.
2. Locate the diplomatic note to be distributed and click on the pencil icon to start the distribution process.

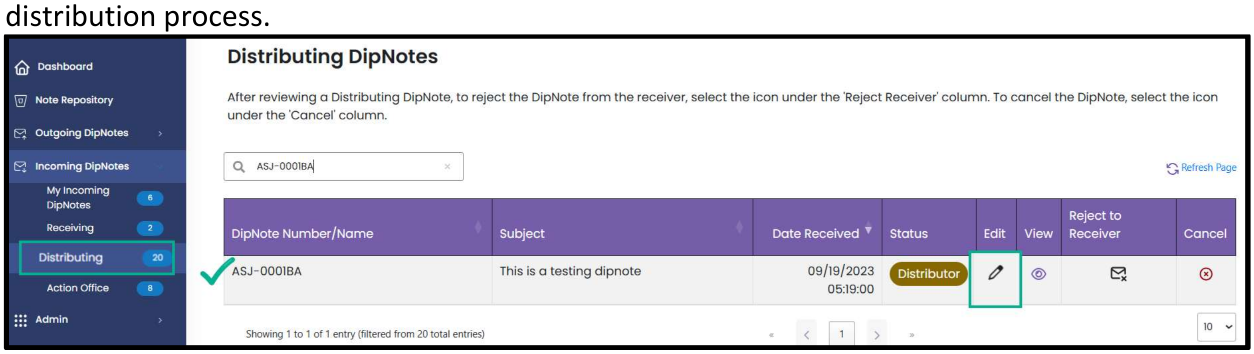


Figure 46. Pencil/Edit icon on the Distributing screen

3. You will be at the **Editing Incoming DipNote – Distributor** screen. From this screen, You may edit the ***DipNote Number | Name***, ***Subject*** and ***DipNote Date***.
4. You may select multiple sections in the ***Info Groups*** list by holding down the **CTRL** key. Edit the rest of the necessary information.

The following actions are available to the **Distributor**:

- ***Link Incoming DipNote*** and ***Link Outgoing DipNote*** – You may reference a previous incoming or outgoing diplomatic note that may be related or applicable.
- ***Reject to Receiver*** – Forwards the diplomatic note back to the **Receiving** office (i.e., there are missing pages in the diplomatic note that must be rescanned and reuploaded). **The distributor may also reject the diplomatic note from the Distributor main page.*
- ***Transfer DipNote*** – Transfers the diplomatic note to another post's distributor or action office
- ***Cancel DipNote*** – Cancels the diplomatic note. No further action can be taken, however, the diplomatic note number and information will remain in the system for possible future reference. The **Distributor** may also cancel the diplomatic note from the **Distributing** main page.
- ***Update DipNote*** – Saves any changes made to the diplomatic note. The diplomatic note stays in the distributor's queue.
- ***Send to Action Office*** – Saves any changes made to the diplomatic note and forwards the diplomatic note to the **Action Office*** for further action and to the **Info Group** as read-only.
  The distributor must select the **Action Office listed and provide a comment before clicking on **Send to Action Office** button.*

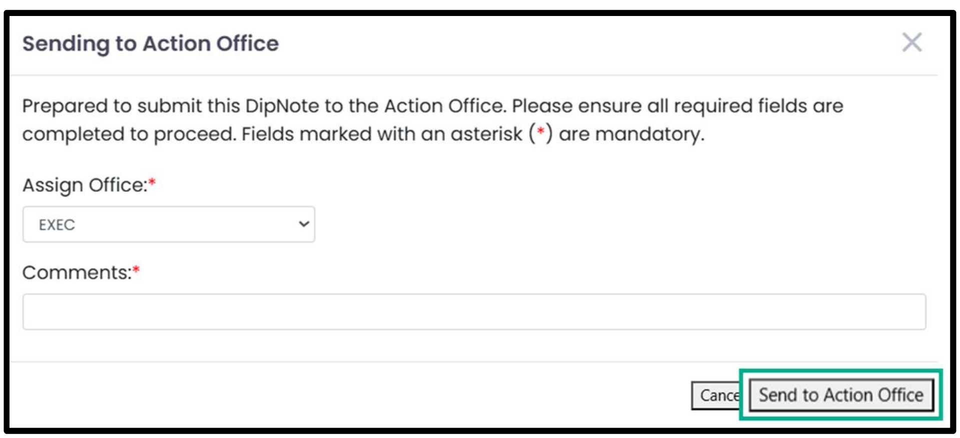


Figure 47. Assigning the diplomatic note to an Action Office

Distributor Role: Rejecting Or Cancelling a Diplomatic Note

When you reject a diplomatic note, it will be forwarded back to the **Receiver's** queue. Cancelling the diplomatic note, on the other hand, changes the status of the diplomatic note to **CANCELLED** but the diplomatic note is retained in the **DipNotes** system.

Steps to Reject Or Cancel a Diplomatic Note

1. Navigate to the **My Incoming DipNotes** section and click on the ***Distributing*** menu option.
2. At the **Distributing** screen, select from the list and click on the **Reject to Receiver** or **Cancel** icon.

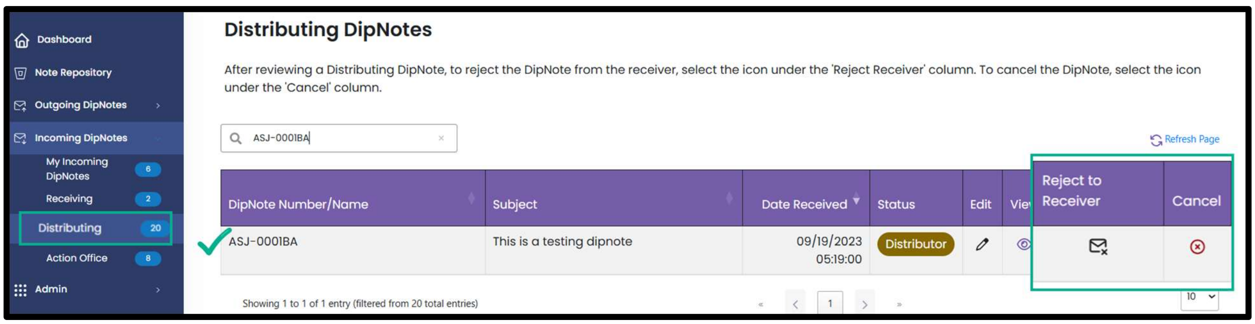


Figure 48. The Distributing screen with options to reject or cancel a diplomatic note

Steps to Reject or Cancel from the Distributing Screen

Another way to reject or cancel the diplomatic note is from the **Distributing** screen.

1. On the **Distributing** screen, click on the pencil icon to edit the diplomatic note.
2. At the **Editing Incoming DipNote – Distributor** screen, there are two buttons from which you can choose: **REJECT TO RECEIVER** (routes back to the Receiver) and **CANCEL DIPNOTE** (changes the status to cancel but is retained in the system). See Figure 45.

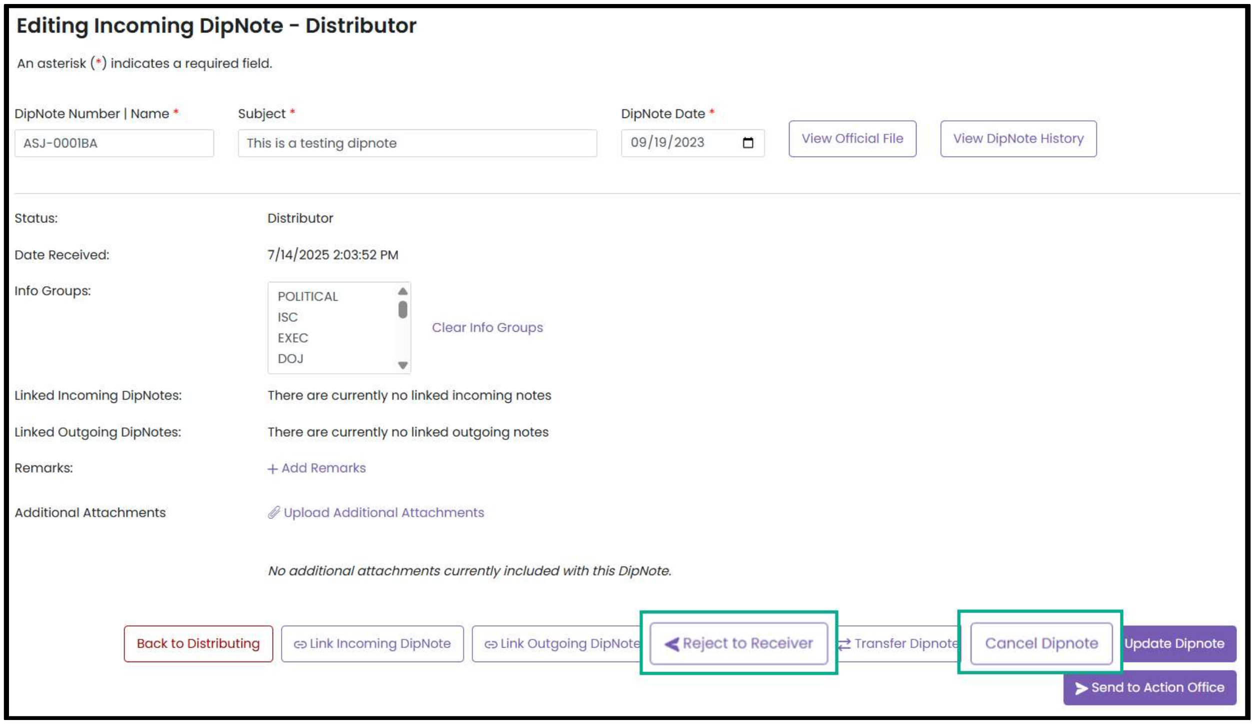


Figure 49. REJECT TO RECEIVER and CANCEL DIPNOTE options

Distributor Role: Transferring a Diplomatic Note to Another Post

The **Distributor** has the option to transfer a diplomatic note to another Post

Steps to Transfer a Diplomatic Note to Another Post

1. Navigate to the **Incoming DipNotes** section and click on the ***Distributing*** menu option.
2. At the **Distributing** screen, select the diplomatic note to be transferred and click on the pencil icon.
3. You are now at the **Editing Incoming DipNote – Distributor** screen. Towards the bottom of this screen, click on the ***TRANSFER DIPNOTE*** button.
4. You are now at the **Transfer Dipnote to Another Post** screen.
5. From the **Select Post owner** drop-down list, select the receiving post.
6. The **Assign To** drop-down list will default to that Post's **Distributor**. You may also select an Action Office, if applicable.
7. In the **Reassignment Comments** textbox, type your comment.
8. Click on the ***TRANSFER*** button.
9. An auto-generated email notification will be sent to the receiving post.

The Action Office "Role": Accepting a Diplomatic Note

After the **Distributor** has reviewed and distributed the diplomatic note, the office granted the **Action Office** role will receive it. The diplomatic note will show in the ***Action Office DipNotes*** screen. An **Action Office** can view, edit, and accept the diplomatic note. In addition, the **Action Office** can also reject back to the **Distributor**, or transfer to another office within the mission, or to another post.

The **Action Office** can view all diplomatic notes with the statuses of *For Action* and *Published*. Published diplomatic notes are incoming notes within the **Action Office**.

The dashboard of the **Action Office** role contains a visual overview of the number of **Incoming DipNotes**, categorized by statuses **For Action** and **Published** – see Figure 46.

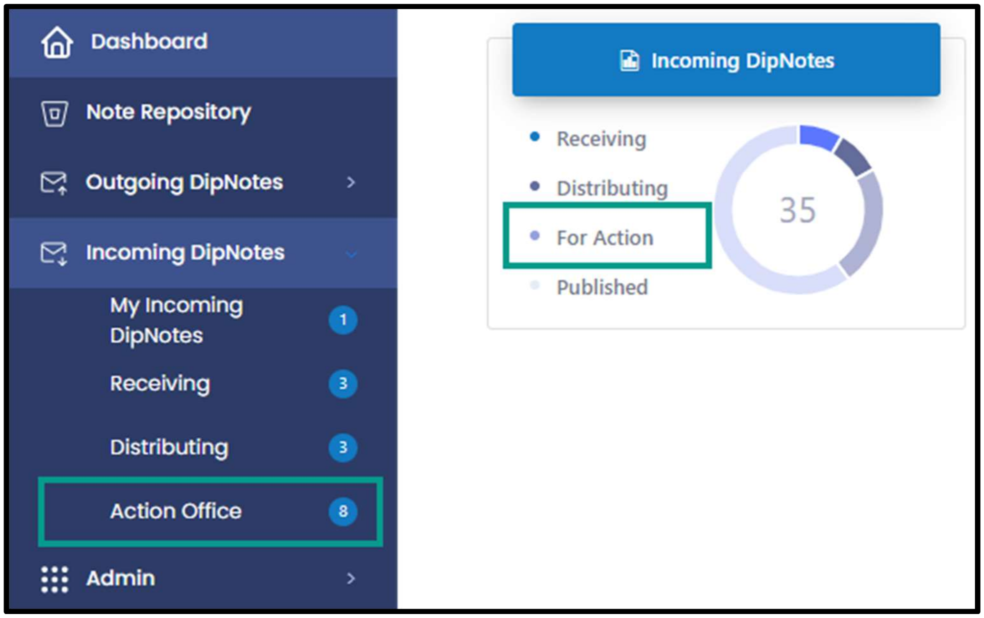


Figure 50. Action Office in the dashboard and left menu

On the left menu panel, the **Action Office** will have the following: **My Incoming DipNotes**. The badge beside it is the number of all incoming diplomatic notes in the **Published** and **Distributed** status for said **Action Office**. The **Action Office** role will also have access to the **Action Office** menu, which will allow the user or office to take further action on the diplomatic note.

Steps to Accept a Diplomatic Note

1. In the left menu panel, under the **Incoming DipNotes**, click on the **Action Office** menu option.
2. You will be at the **Action Office DipNotes** screen. Locate the diplomatic note you want to accept and click on the pencil icon.

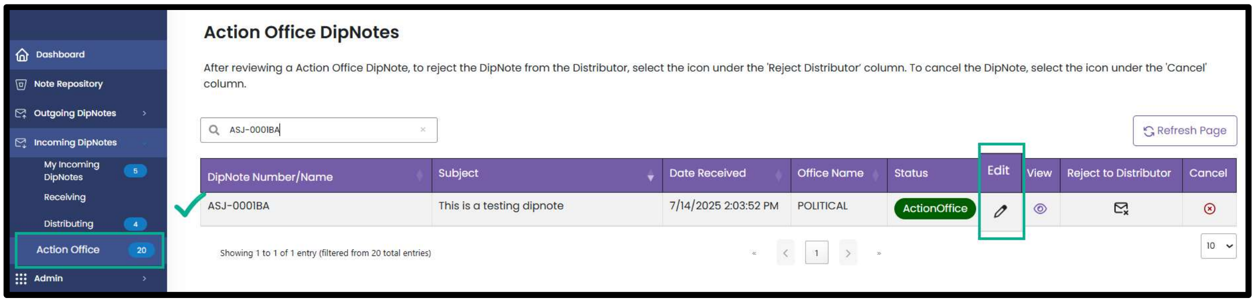


Figure 51. The pencil/edit icon on the Action Office screen

3. At the bottom of the **Editing DipNote Number/Name: *<dipnote number>*** screen, click on the ***ACCEPT/REJECT/REASSIGN*** button.
4. A pop-up window will appear. From the **Action** drop-down list, select the appropriate action. The choices are *Pending*, *Yes*, *No*, and *Reassign*.

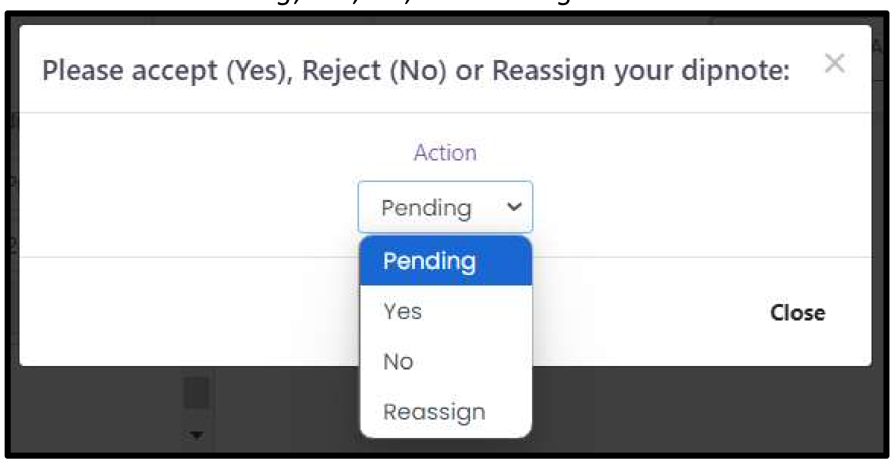


Figure 52. Drop-down list of actions for an Action Office

5. At the **Accepting the DipNote** window, check the box if there is PII in the diplomatic note, If there is, the SENSITIVE caption will automatically be selected. To add more captions, click the blue ***add here*** link. Then, you will choose the offices that will be able to see the contents of the diplomatic note. Otherwise, leave the PII field unchecked.

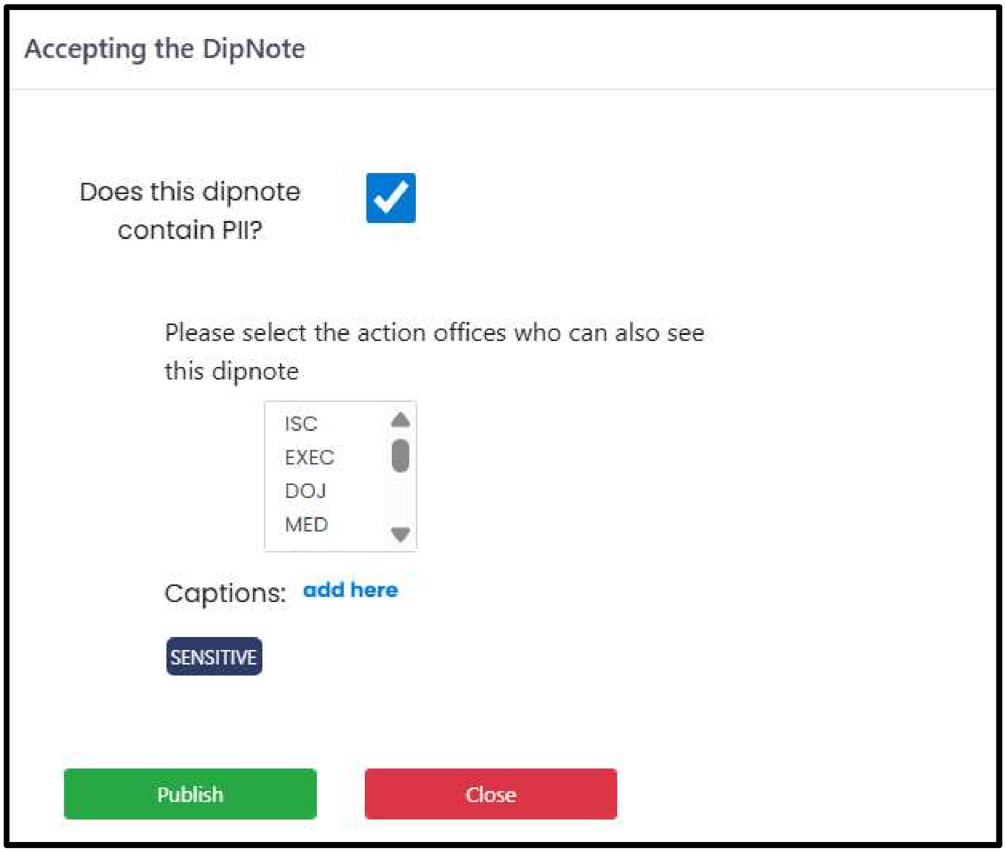


Figure 53. Accepting the DipNote window, including the PII checkbox and Publish button

6. Click on the **green** **Publish** button.

> If the user is connected via *OpenNet*, *GoVirtual* or *GoDesktop*, AND the user has an active SMART account, **DipNotes** will automatically connect to SMART, upload the file, and attempt to retrieve the MRN.

THE ACTION OFFICE "ROLE": TRANSFERRING A DIPLOMATIC NOTE TO ANOTHER POST

The **Action Office** has the option to transfer the diplomatic note to another Post.

STEPS TO TRANSFER A DIPLOMATIC NOTE TO ANOTHER POST

1. In the left menu panel, under the **Incoming DipNotes**, click on the **Action Office** menu option.
2. You will be at the **Action Office** screen. Locate the diplomatic note you want to accept and click on the pencil icon.
3. At the **Editing Incoming DipNotes – Action Office** screen, towards the bottom of the screen, click on the ***TRANSFER DIPNOTE*** button.

Figure 54. TRANSFER DIPNOTE button

4. At the **Transfer DipNote to Another Post** screen, select the post from the **Select Post Owner** drop-down list. The **Assign To** field will automatically populate with the receiving Post's **Distributor** and **Action Office/s**. Provide your comment in the **Reassign Comments** text field.

Figure 55. Transfer Dipnote to Another Post screen

5. Click on the ***TRANSFER*** button.

Transfer DipNote will only work if the receiving post is also a DipNotes user. All posts visible in the *Select Post owner* dropdown field are active DipNotes posts.

The Action Office "Role": Reassigning a Diplomatic Note to Another Office

The **Action Office** can reassign a diplomatic note to another office.

Steps to Reassign a Diplomatic Note to Another Office

1. In the left menu panel, under the **Incoming DipNotes**, click on the **Action Office** menu option.
2. You will be on the **Action Office DipNotes** screen. Locate the diplomatic note you want to accept and click on the pencil icon to view the diplomatic note information.
3. At the **Editing DipNote Number/Name: *<dipnote number>*** screen, click on the ***ACCEPT/REJECT/REASSIGN*** button.
4. A pop-up window will appear. From the **Action** drop-down list, select the appropriate action. The choices are ***Pending***, ***Yes***, ***No***, and ***Reassign***. Click on the ***Reassign*** option.
5. From the popup window, select the office from the **Assign this dipnote to another owner** drop-down list and type comments in the **Reassignment Comments** text field. Click on the **Reassign** button.

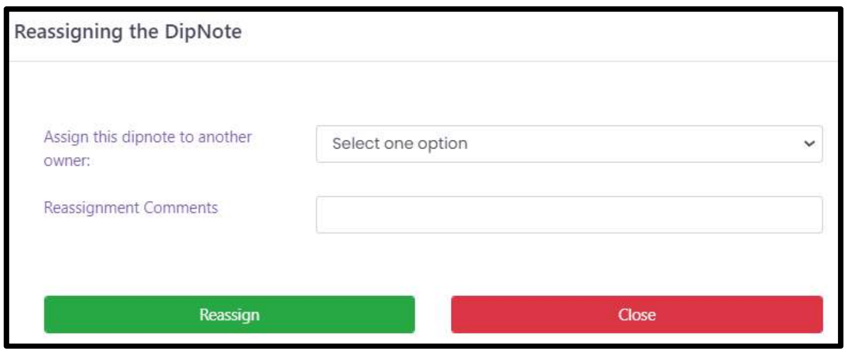


Figure 56. Green Reassign button

The Action Office "Role": Cancelling a Diplomatic Note

The **Action Office** has the option to cancel a diplomatic note. When a diplomatic note is cancelled, the status will change to ***CANCELLED***, however, the diplomatic note is still retained in the **DipNotes** system.

Steps to Cancel a Diplomatic Note

1. In the left menu panel, under the **Incoming DipNotes**, click on the **Action Office** menu option.

2. You will be on the **Action Office DipNotes** screen. Locate the diplomatic note you want to cancel and click on the cancel icon – a red ***x*** in a circle.

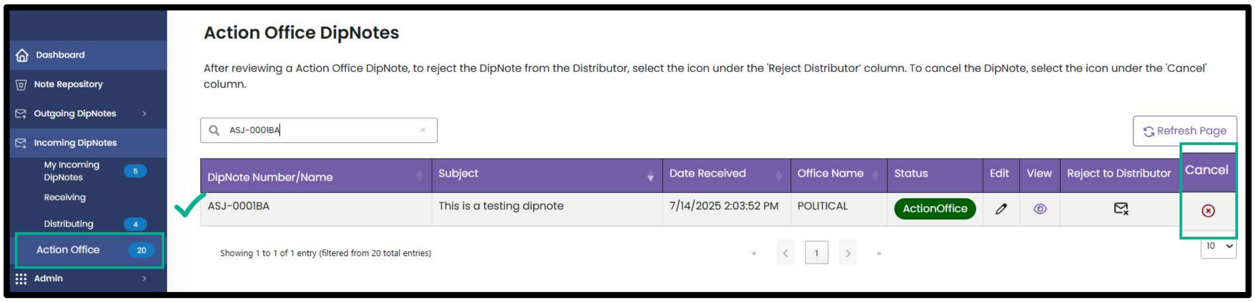


Figure 57. Cancel icon on the Action Office screen

3. You can also click on the pencil icon. On the **Editing DipNote Number/Name: *<dipnote number>*** screen, click on the **Cancel DipNote** button.
4. A pop-up window will appear, requiring the **Action Office** to provide a comment. Type in the comment and click on the ***Accept*** button. The status will change to ***CANCELLED*** and you will be redirected to the main **Action Office Dipnotes** screen.

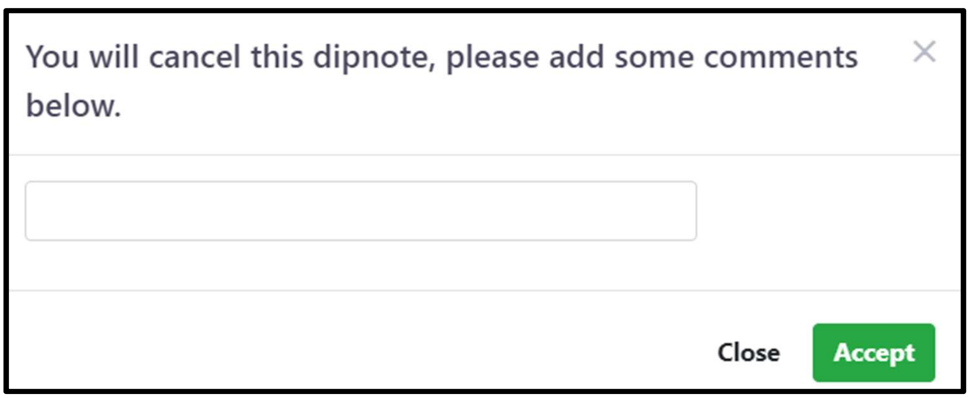


Figure 58. Green Accept button

The Action Office "Role": Rejecting a Diplomatic Note Back to the Distributor

When an **Action Office** rejects a diplomatic note, it will be routed back to the **Distributor**.

Steps to Reject a Diplomatic Note

1. In the left menu panel, under the **Incoming DipNotes**, click on the **Action Office** menu option.
2. You will be on the **Action Office DipNotes** screen. Locate the diplomatic note you want to reject and click on the **Reject to Distributor** icon. You can also click on the pencil, **Edit**, icon.

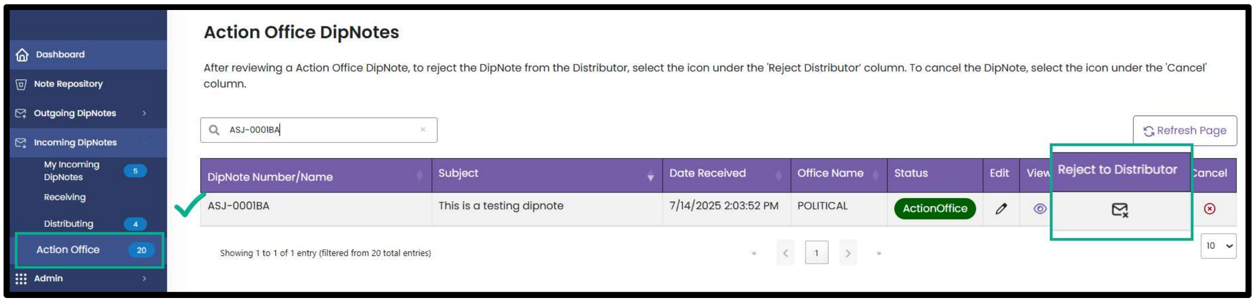


Figure 59. Reject to Distributor icon to reject a diplomatic note

3. At the **Editing Incoming DipNotes – Action Office** screen, click on the ***ACCEPT/REJECT/REASSIGN*** button.
4. A pop-up window will appear, and you will select *No* from the **Action** drop-down list.
5. Another pop-up window will appear, indicating you are sending this diplomatic note back to the **Distributor**. The system will require you to type comments in the **Reason for Rejection** text field.
6. Click on the **Reject to Distributor** button. The diplomatic note will be routed back to the **Distributor's** queue once it is saved.

The Reject Feature Is Disabled If:

1. From the Action Office menu, if the office has enabled the Private Mailroom feature and rejected the diplomatic note, the diplomatic note will be forwarded to the Receiving menu.
2. From the Distributing menu, if the diplomatic note was transferred from a different post and the distributor attempts to reject the note to the Receiver.
3. From the Action Office menu, if the diplomatic note was transferred from a different post and action office attempts to reject the note to the Distributor.

Private Mailroom

The **Receiver** role is the office designated to receive the physical copy of the diplomatic notes from outside organizations on behalf of all offices. However, there are specific offices (e.g., DOJ) who prefer to receive their own physical diplomatic notes due to the sensitivity of the content. In the **DipNotes** application, an office may enable the **Private Mailroom** function. This will allow the said office the ability to upload their diplomatic notes to the application. The diplomatic note skips the **Distributor's** queue and goes straight to the office's **Action Office** queue.

The Private Mailroom Process

When the office receives the physical copy of the diplomatic note, the office will need to scan the diplomatic note by going to **My Incoming DipNotes** and selecting **Receiving**. From the

Receiving page, the user will need to select the file and click on the **Upload** button. Once the diplomatic note has been successfully uploaded, the note skips the Distributing process and goes straight to the office's **Action Office** queue.