सत्यमेव जयते

eOffice

A DIGITAL WORK PLACE SOLUTION

eFile

File Management System

User Manual

NIC-EOF-EFILE-UM-001

Prepared by
National Informatics Centre

Amendment History

Date	Application Version	Description	Author
May, 2014		User Manual	eOffice Project Division
September, 2017	5.5	User Manual	eOffice Project Division
May, 2018	5.5_05	User Manual	eOffice Project Division

Table of Contents

Objective of the Application

The need for transforming conventional government offices into more efficient and transparent e-offices, eliminating huge amounts of paperwork has long been felt.

The eOffice product pioneered by National Informatics Centre (NIC) aims to support governance by using more effective and transparent inter and intra-government processes.

eFile, an integral part of eOffice suite is a system designed for the Government departments, PSUs and Autonomous bodies to enable a paperless office by scanning, registering and routing the inward correspondences along with creation of file, noting, referencing, correspondence attachment, draft for approvals and finally movement and tracking of files as well as receipts.

Introduction

eFile is a workflow based system that includes the features of existing manual handling of files in addition to more efficient electronic system. This system involves all stages of working in a file, including the diarisation of inward receipts, creation of files, movement of receipts and files and finally, the archival of records. With this system, the movement of receipts and files becomes seamless and there is more transparency in the system since each and every action taken on a file is recorded electronically. This simplifies decision making, as all the required information is available at a single point.

It envisions a paperless office, with increased transparency, efficiency and accountability of the organization.

A revolutionary product aimed to make office work like never before in the history of Indian Governance, is based on the Thirteenth edition of Central Secretariat Manual of Office Procedures (CSMoP) of the Department of Administrative Reforms & Public Grievances (DARPG), Govt. of India.

Need of eFile

Information technology has changed the life style of people over a period of time. At the same time, environment plays a major role in the innovation of technology, and later technology becomes the need of the society.

Files and receipts became an important entity in any organization. There may be thousands of paper documents in the form of Files/Receipts being dealt in an organization on a daily basis. Keeping record of these paper documents, their movement and safety involves lots of time, money and efforts which in turn decreases the efficiency and productivity of an organization.

So, any organization looking for a solution that will allow it to capture the documents in digital form, archive them with some basic information for fast retrieval, movement of the document with the comment/remark, opening of file to bring all related documents in one folder, noting on file, movement of file for approval finally issuance of letter to the sender, can go for this product.

What began with the development and implementation of the “File Tracking System” which was a major step towards Less Paper Office, NIC (National Informatics centre) always in forefront in the adoption of new enabling technologies in information and communication technology to meet the need of the organization/society, paved the path for the eFile a workflow based product enabling end to end electronic file movement across the government.

Manual techniques for diarizing, moving and recording of Files/Letters, makes the tracking of those files/letters a very difficult task, thus delaying the work and decreasing the efficiency. Due to the inefficiency of tracking with the manual system, there arose a need for a Computerized File Tracking System. An automated office attempts to perform the functions of ordinary office by means of a computerized system. In a manual office scenario, there are thousands of letters and files and their manual tracking is not a very easy task. A computerized File Tracking System enables users to track these letters and files within seconds. Also, dispatch and record keeping are made easy. It ensures proper distribution of work load, thus increasing the efficiency of the system and bringing transparency to the system. The system simulates the manual system in a digital environment.

eFile Login

- Enter the **Login ID** & **Password** in the eOffice portal, click  button as shown in **Fig.1**:

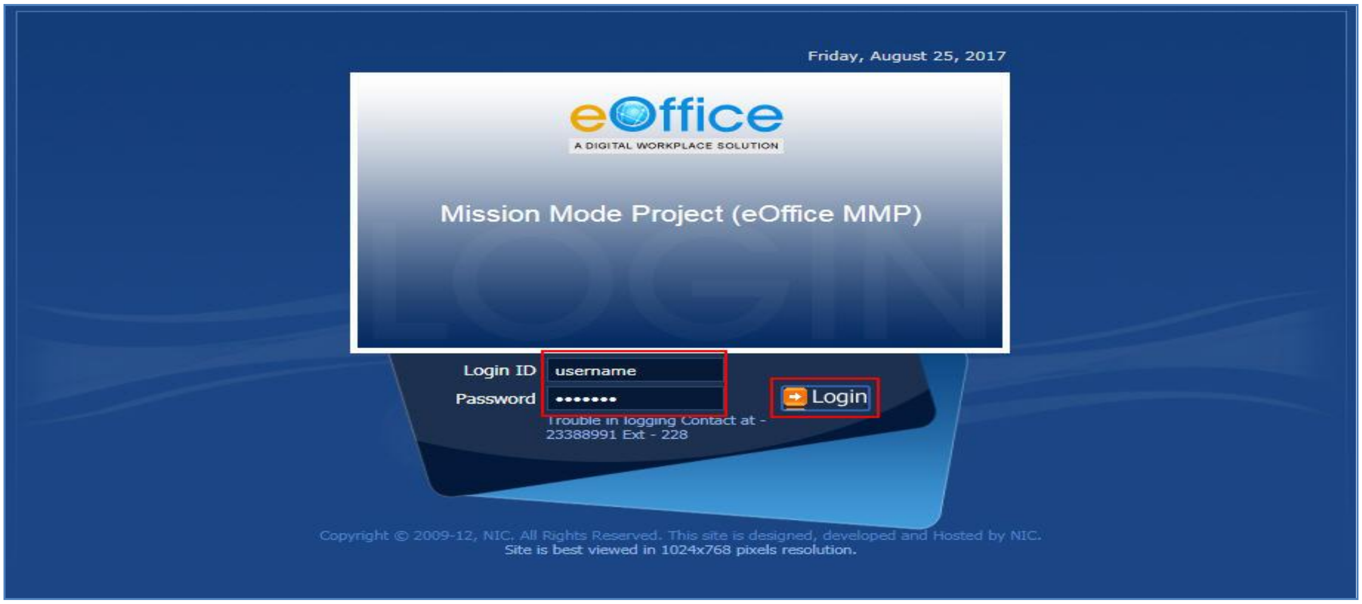


Fig.1

- eOffice homepage is displayed on successful login.

- To open the **File Management System**, click the link mentioned in the left panel as highlighted in **Fig.2**:

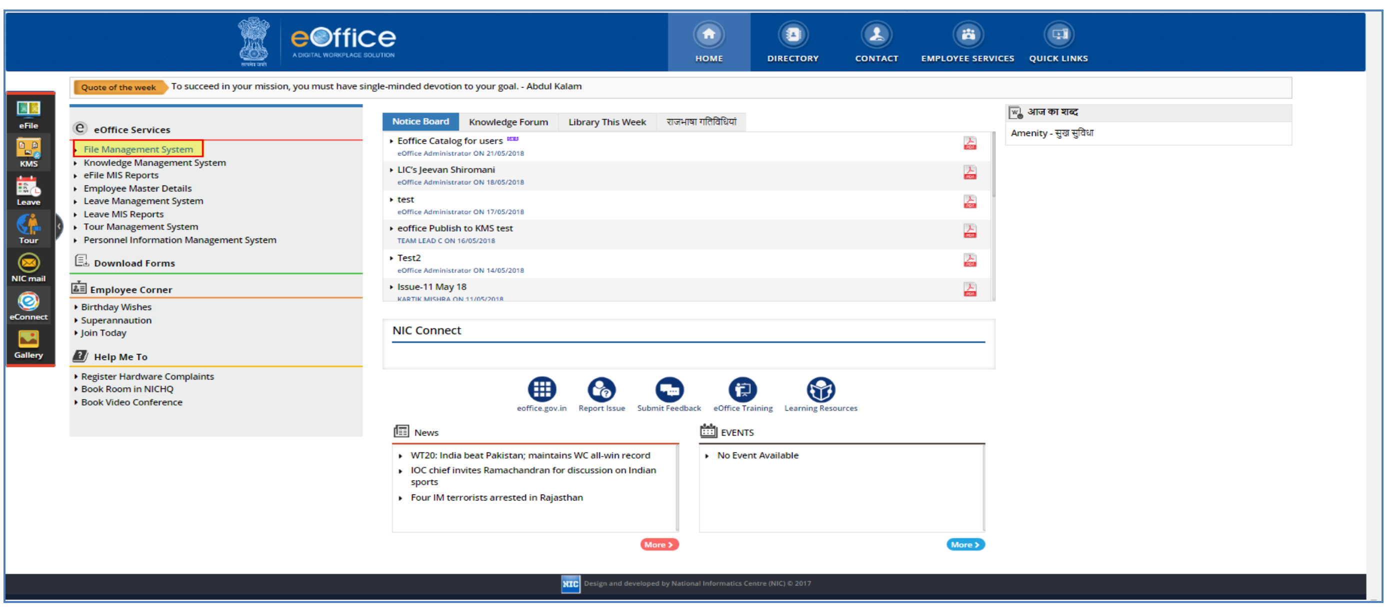


Fig.2

- User is then redirected to the application, as shown in **Fig.3**:

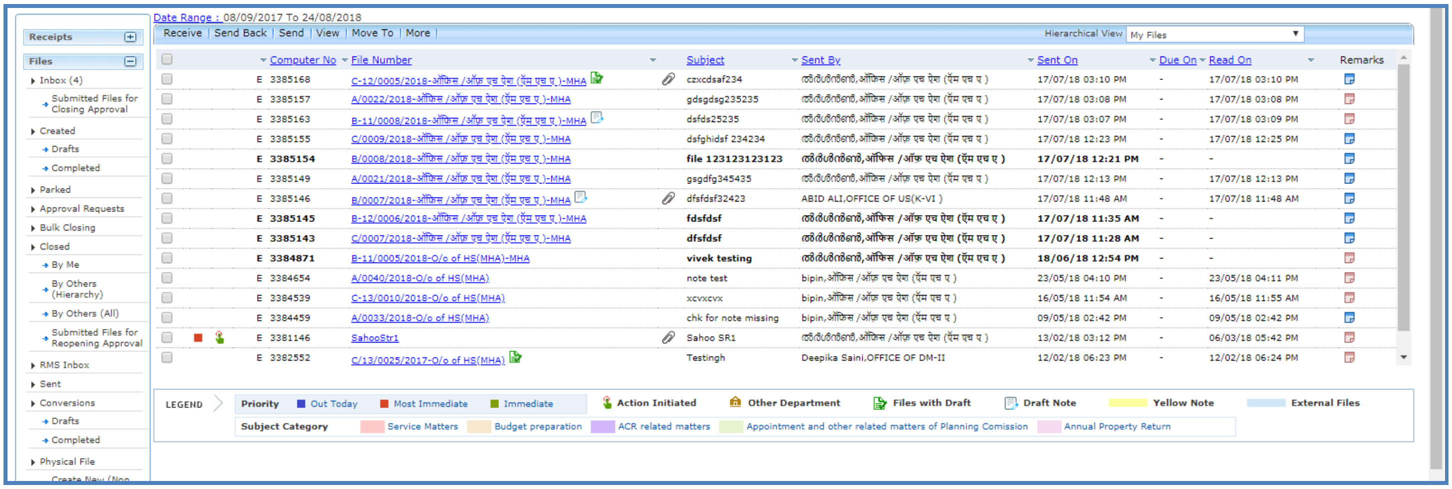


Fig.3

Note:

For multiple post login refer to Annexure-I (Multiple Post Login in eFile).

eFile Modules

File Management System (FMS) or eFile, comprises of different modules which are inter-linked and manage the official work flow of the entire life cycle of a Document/DAK from the moment it is received by the organization till the time it is disposed of with proper set of actions.

The different modules in FMS are Receipts, Files, Dispatch, Notifications, Settings and etc. Each module comprises of different sub modules (links) with actionable menus that help the users to accomplish different official procedures in an electronic environment.

First of all, let's learn how to use the **Receipts** module of eFile.

Receipts

Once a DAK/ letter is diarised and a unique receipt/ diary number is allocated then it becomes **Receipt**.

The links available under Receipt module are shown in **Fig.4**:

Fig.4

Let's learn about these subs - modules one by one:

Browse & Diarise

It is used to generate receipts which can be either physical or electronic.

➢ **Physical**: The unique number for the DAK is generated by the system, and further processing of the receipt can either be physical (manual) or electronic in nature.

➢ **Electronic**: The unique number for the DAK is generated by the system, and further processing of the receipt is always electronic in nature.

Note:

The Document will start with the Electronic diarization of DAK/ letter, on completion of which the Physical diarization of DAK/ letter will be covered.

Electronic DAK/ letter Diarisation

The DAK/ letter must be scanned as a single PDF (preferably a searchable PDF).

Note:

For scanning the DAK/ letter refer to Annexure-II (Guidelines for Scanning).

To diaries the Electronic DAK/ letter, perform the following steps:

- Click the **Electronic** link under **Browse & Diarise** sub-module, as shown in **Fig.5**:

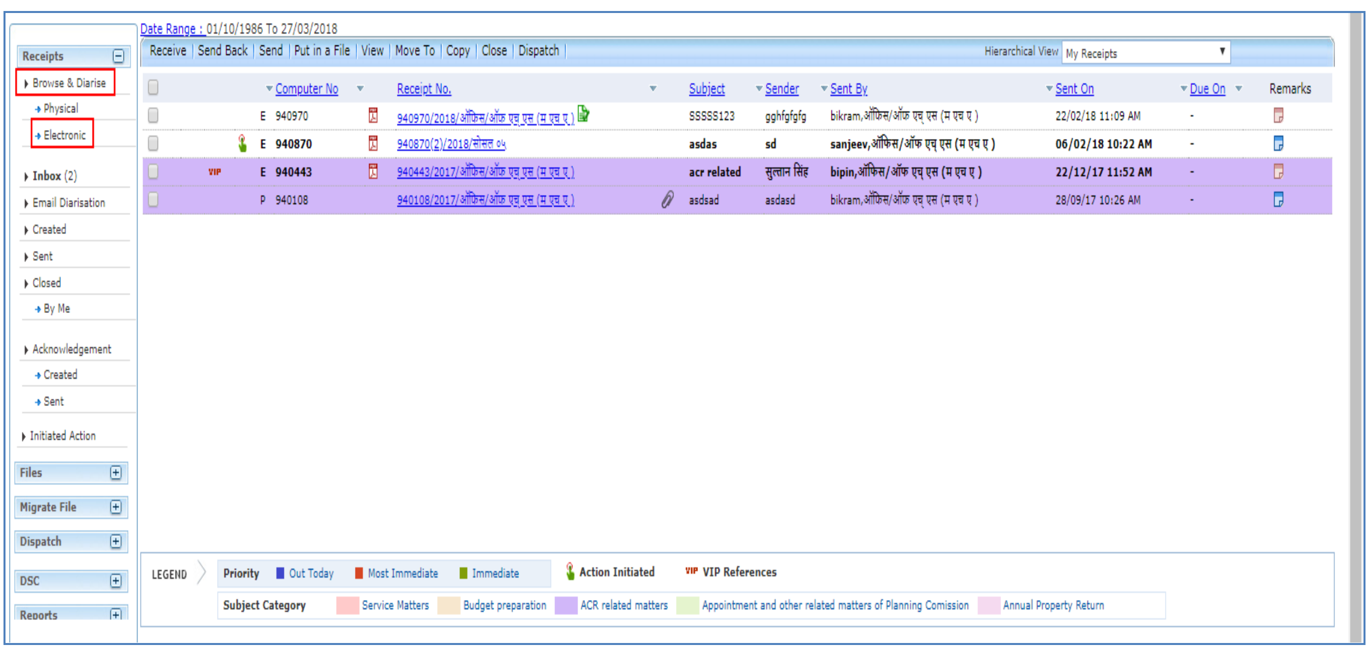


Fig.5

- The screen as shown in **Fig.6** appears:

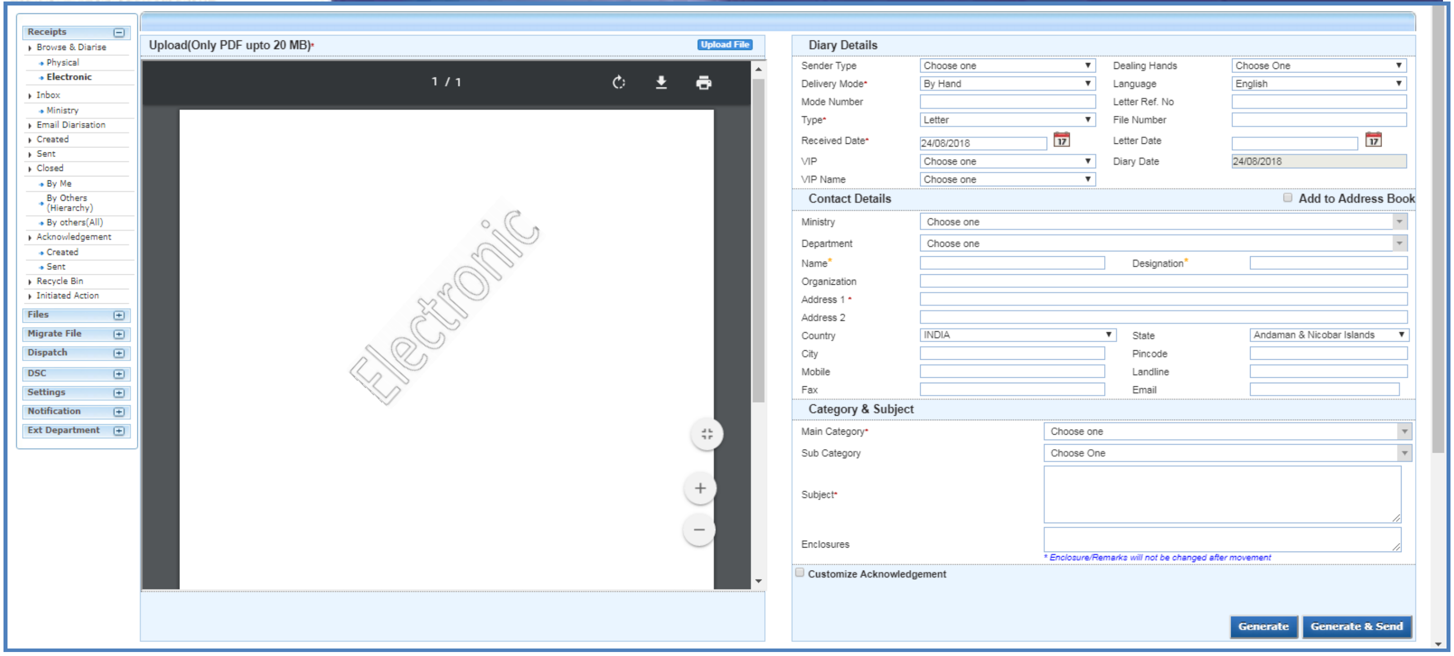


Fig.6

- Click the **Upload File** button. The File Upload dialog box appears. Select the desired scanned PDF document (**upto 20 MB**) and click **Open** button as shown in **Fig.7**:

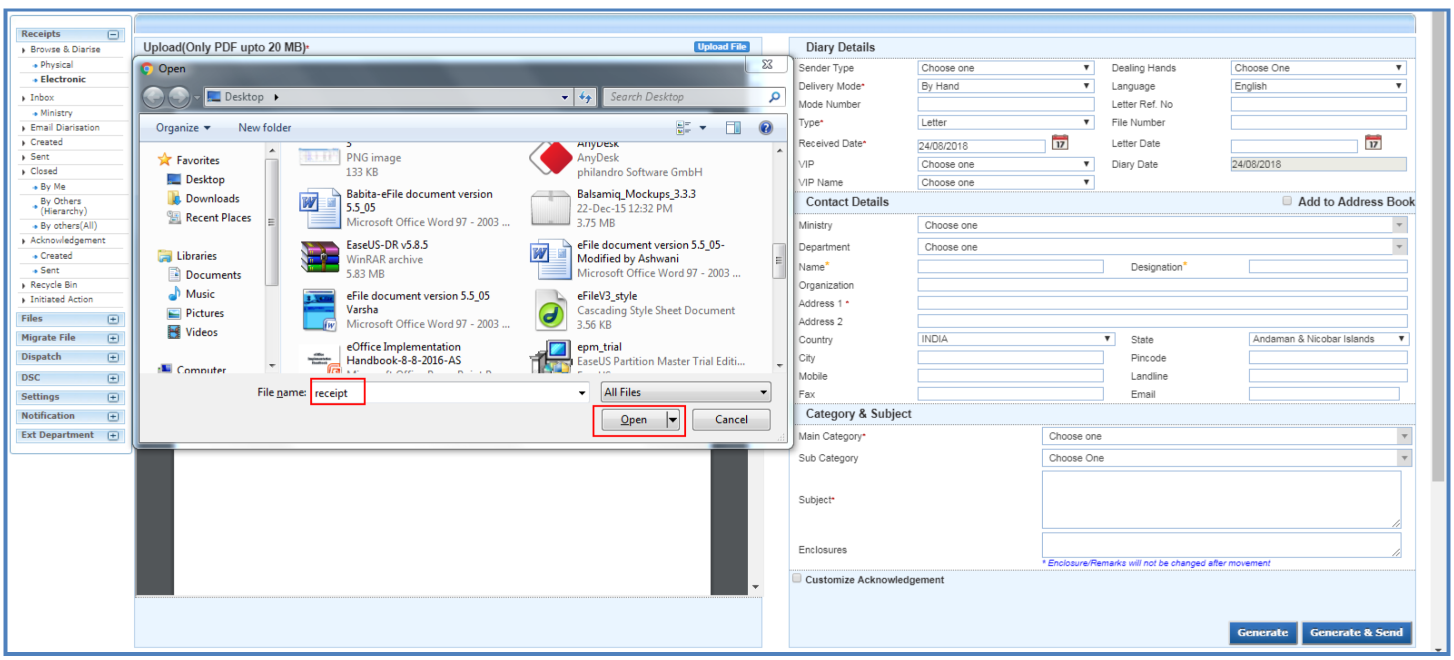


Fig.7

- Once the scanned DAK/ letter is uploaded, enter the required metadata (various details in the fields available on the right of the screen) and then, click **Generate** button as shown in **Fig.8**:

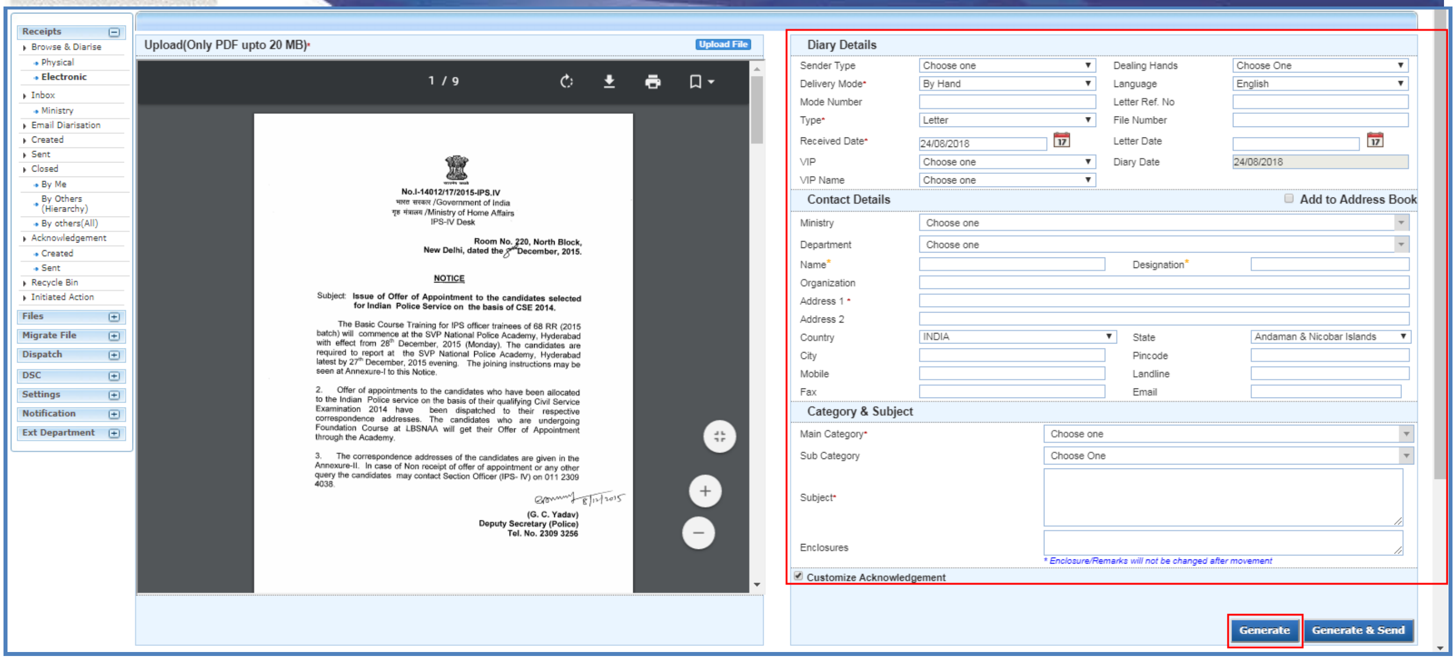


Fig.8

Note:

All the mandatory fields are marked with Red asterisk (*).

User can choose one of the fields marked with orange asterisk (*).

Customize Acknowledgment: There is a provision to acknowledge the sender who has sent the DAK/ letter, that has been received in the organization (Refer Acknowledgment sub-module).

- The DAK / letter gets diarised and a unique **Receipt Number** is generated as shown in **Fig.9**:

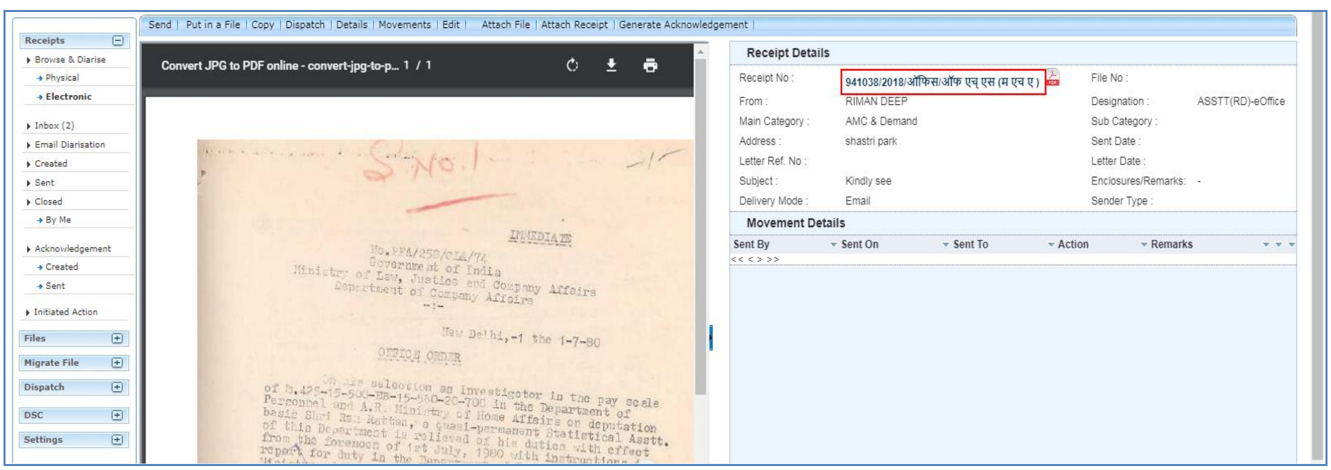


Fig.9

- The generated receipts are saved in the "**Created**" sub-module till they are marked to other user(s).

- **Generate & Send** button (refer **Fig.8**): Generates the Receipt Number and redirects the user to Receipt **Send** screen.

- **Generate & Copy** button (***This feature is configurable***): Generates the Receipt Number and redirects the user to diary screen retaining the content (pdf) and metadata (***Copying the pdf content is also configurable feature***) of the receipt.

The actions that can be taken on a receipt are shown in **Fig.10:**

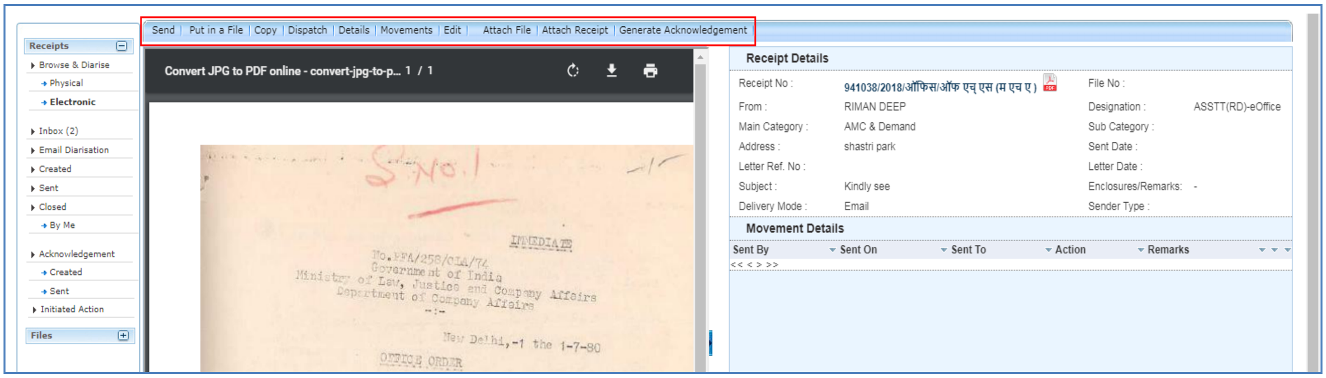


Fig.10

These actions are explained below:

1. **Send**: This option facilitates the user to mark the receipt to the intended recipient(s). Click **Send** tab, the send screen is displayed as in **Fig.11:**

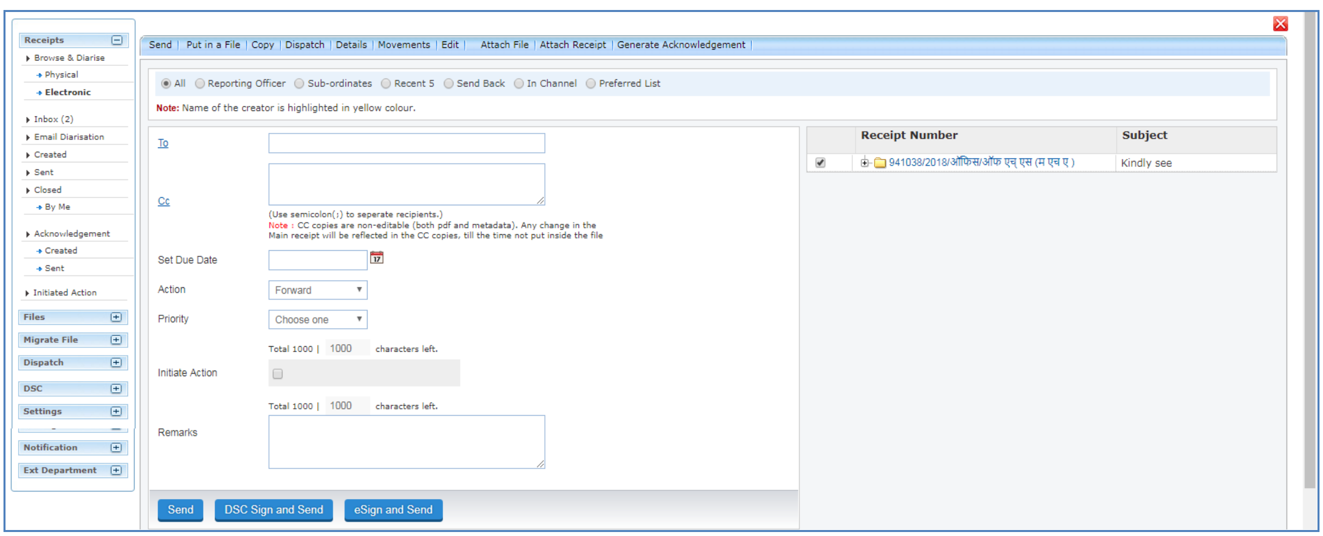


Fig.11

a) **To**: In the **To** field, search the user either by **name** or **marking abbreviation** or **section/organization unit name** of the recipient. Then, select the officer from the filtered employee list as shown in **Fig.12**:

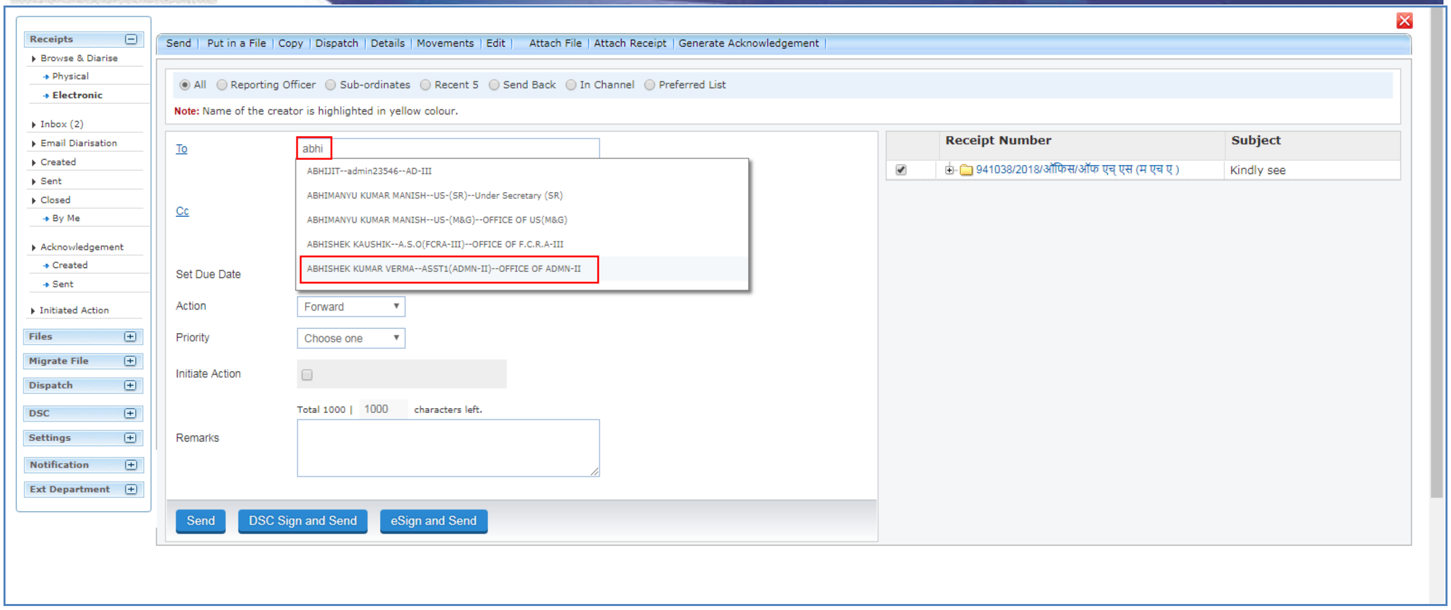


Fig.12

Or

- User can also click the '**To**' link, then, click **Contacts tab** and select user from the list box as shown in **Fig.13**:

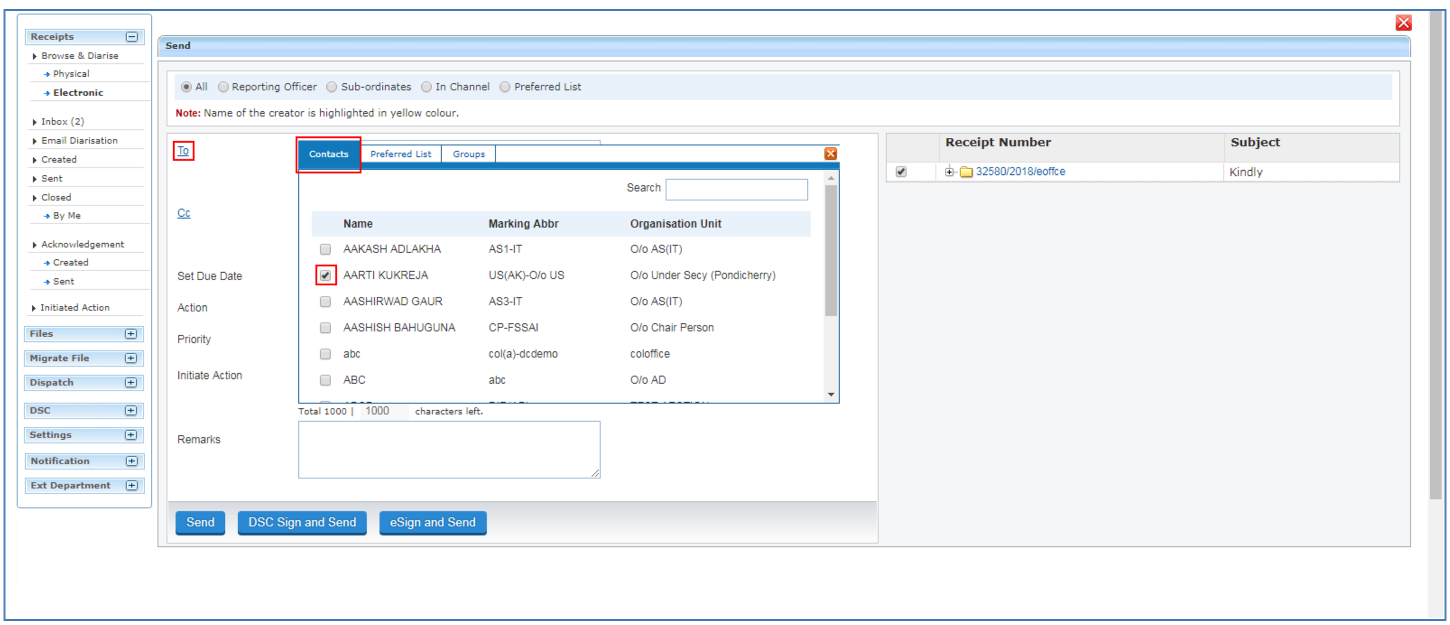


Fig.13

- Provision of radio button has been made available to select the user from different groups of recipient such as: All, Reporting Officers, Subordinates, Recent 5, In Channel and Preferred List as shown in **Fig.14**:

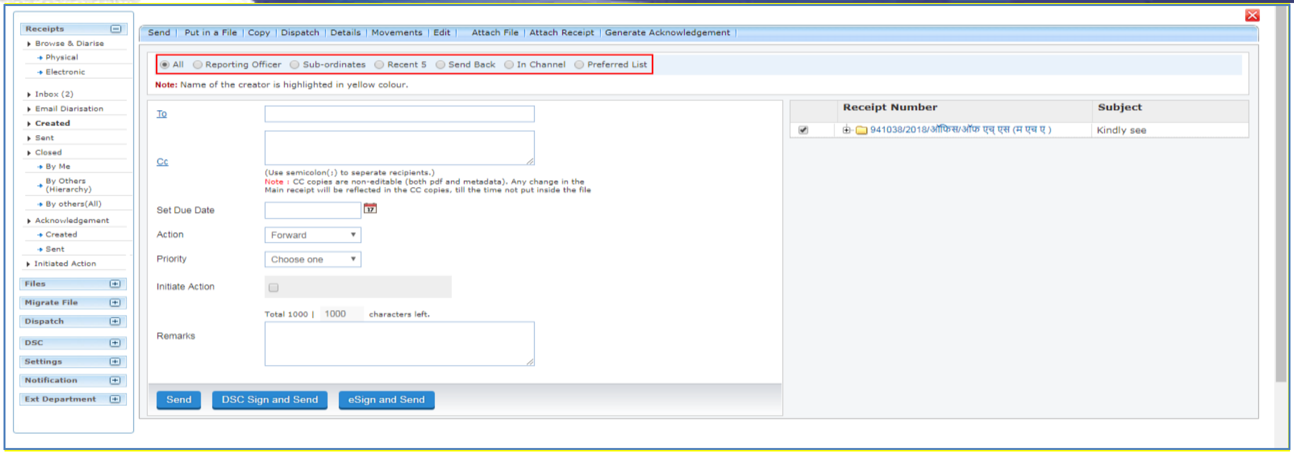


Fig. 14

i. **All**: By default, "**All**" remains selected giving the logged in user option to view and select a recipient from all the active users in the department.

ii. **Reporting Officer**: When "**Reporting Officer**" is selected, the 'Send To' list will display the **official just above in the hierarchy** of the logged in employee.

iii. **Sub-ordinates**: When "**Sub-ordinates**" is selected, the list will display the **officials just below in the hierarchy** of the logged in employee.

Note:

To get the name populated in Reporting Officer and Sub-ordinates options, the official's/user's post hierarchy needs to be defined in Employee Master Details (EMD).

iv. **In channel**: It helps the user to mark the receipt to officials who are **already in the submitted channel of the receipt.**

Note:

When user is sending multiple receipts, Send Back and In Channel radio buttons will not be available.

v. **Preferred List**: It helps to select officials from the list of "**Preferred List**" already created by the user.

Note:

To create the preferred List Click the To link→Go to Contacts tab→select the users by selecting the check box or by searching the name in search box and then selecting the check box → click Add to: Preferred List link.

b) **Cc:** It is used to mark copies of the receipt to users other than main recipient selected in **To** field.

Note:

When user is sending receipt to multiple recipient, in **Cc** field **employees (listed under All radio button)** can be marked excluding the employee listed in **To** field.

Multiple recipients are separated by using semi colon **(;)**

c) **Due date**: Date by which work is supposed to be done. Assign a **Due Date** to the recipient using the **Set Due Date** option.

d) **Action**: An easy way to notify the recipient the action that is required on receipt. Select **Action** which is to be taken, from the dropdown menu.

e) **Priority**: It is the preference assigned to the receipt based on its urgency. Set the **Priority** of the receipt, from the dropdown menu.

f) **Initiate Action**: It is used to track the set of action(s) taken on any receipt. The receipt can be tracked even after it is put in file. Check the **Initiate Action** check box, provide initiation type to **initiate** action and **track** the actions that will be taken on the receipt.

g) **Remarks**: These are the forwarding comments given on receipt while sending them to recipient. Type forwarding remarks in the Remarks field.

Note:

In case initiate action is selected, then Remarks field becomes mandatory.

After selecting the recipient(s) and entering other details, user can send the receipt using any of the following **Send** options:

- **Send**: On clicking 

button in **Fig.15**, the receipt will be marked to the intended user(s).

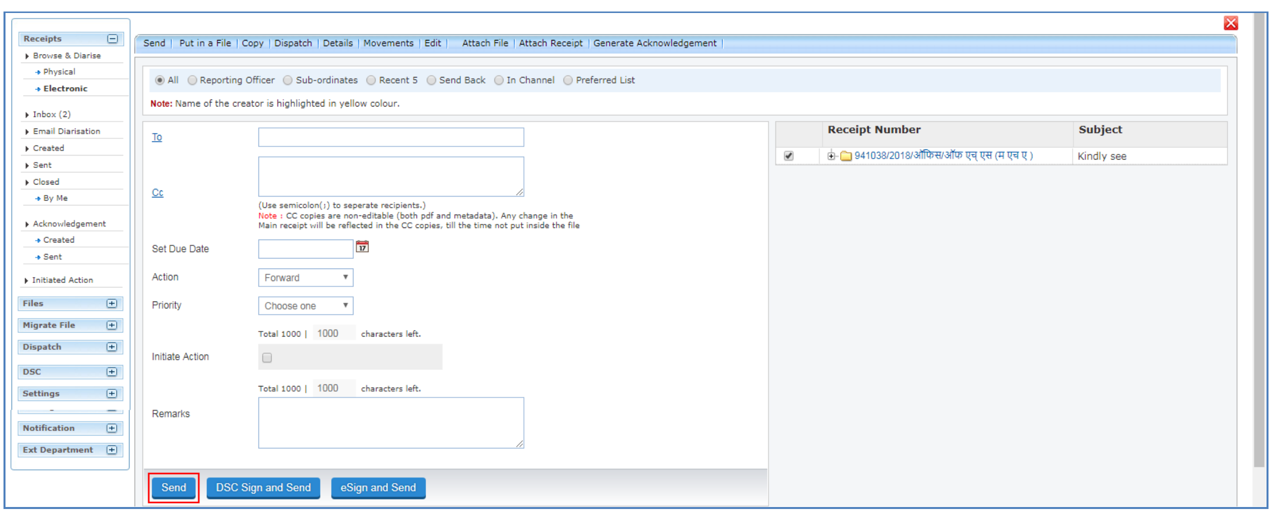


Fig.15

➢ **DSC Sign and Send**: On clicking DSC Sign and Send button, a pop window appears asking for the **DSC** token Pin. Enter the **Pin** and click OK button and the receipt is sent.

Note:
For complete process refer to Annexure-III (Digital Signing of Receipt Remark).

➢ **eSign and Send**: On clicking eSign and Send button, a pop window appears asking to continue the agreement with "I Agree". Enter the **OTP** received on Aadhaar registered mobile number and click OK button, the receipt is sent.

Note:
For complete process refer to Annexure-IV (eSigning of Receipt Remark)

- The Digital Signature/eSign appears on the Receipt Remarks in Movement Details Page.
- Once the receipt is sent using any of the above Send option, the receipt will be visible in the Inbox of recipient. The user who sent the receipt can check the details of the receipt in his/her own Sent folder.

2. **Put in a File**: To **put** the **generated receipt** into a **concerned file,** perform the following steps:

- Click Put in a File tab. A list of files appear**,** as shown in **Fig.16:**

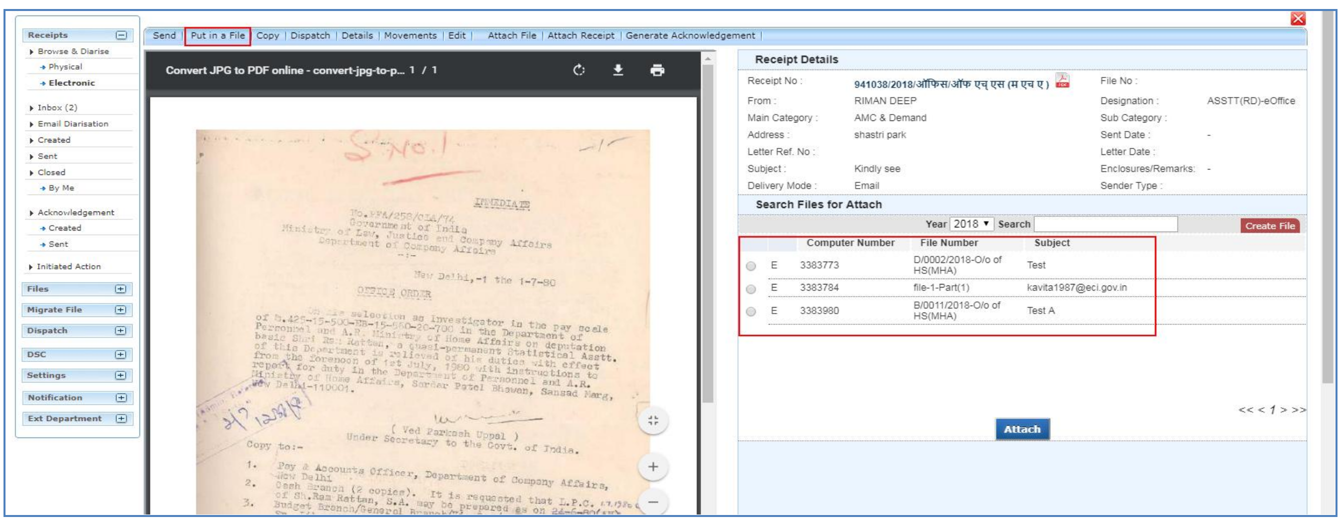


Fig.16

Note:
The list contains files which are present in 'Created (Completed)' or 'Inbox' section of File of the user.

- Select the file in which the receipt needs to be put in. Click the Attach button (**Fig.17**), and the receipt gets attached in the correspondences of the selected file.

- User can also **search** the file using **Year** and **Search fields**.

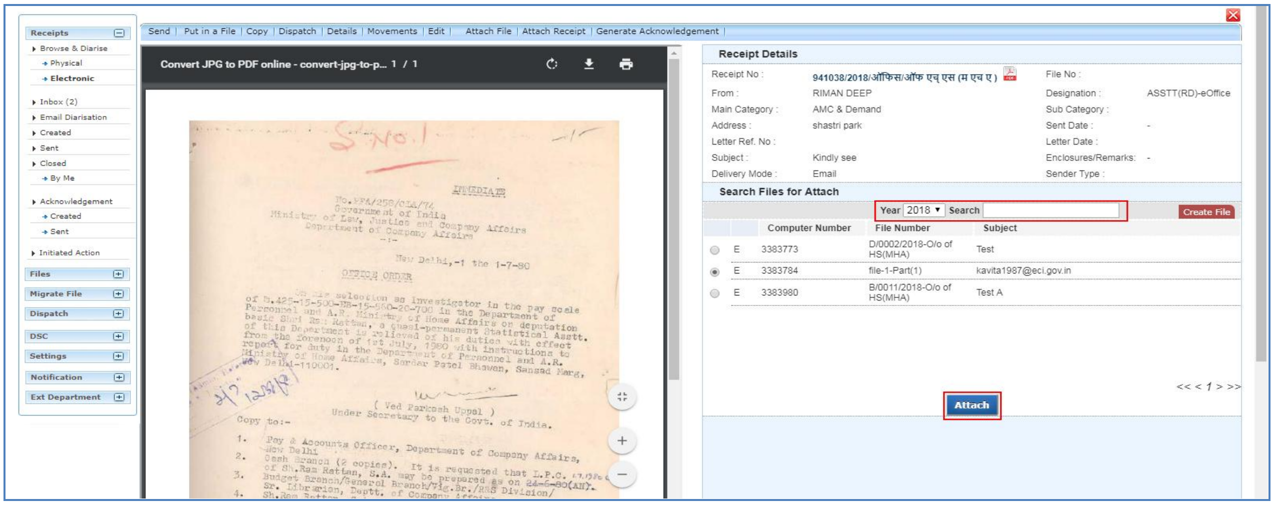


Fig.17

Note:

Main Receipt can't be put inside a File (**Put in a File** option) which is already attached with another File/ Receipt. To do so, user needs to first detach the attached file.

OR

- Create the **New File** (non-SFS File) from the receipt Put in a File list screen itself using Create File button as shown in **Fig.18**:

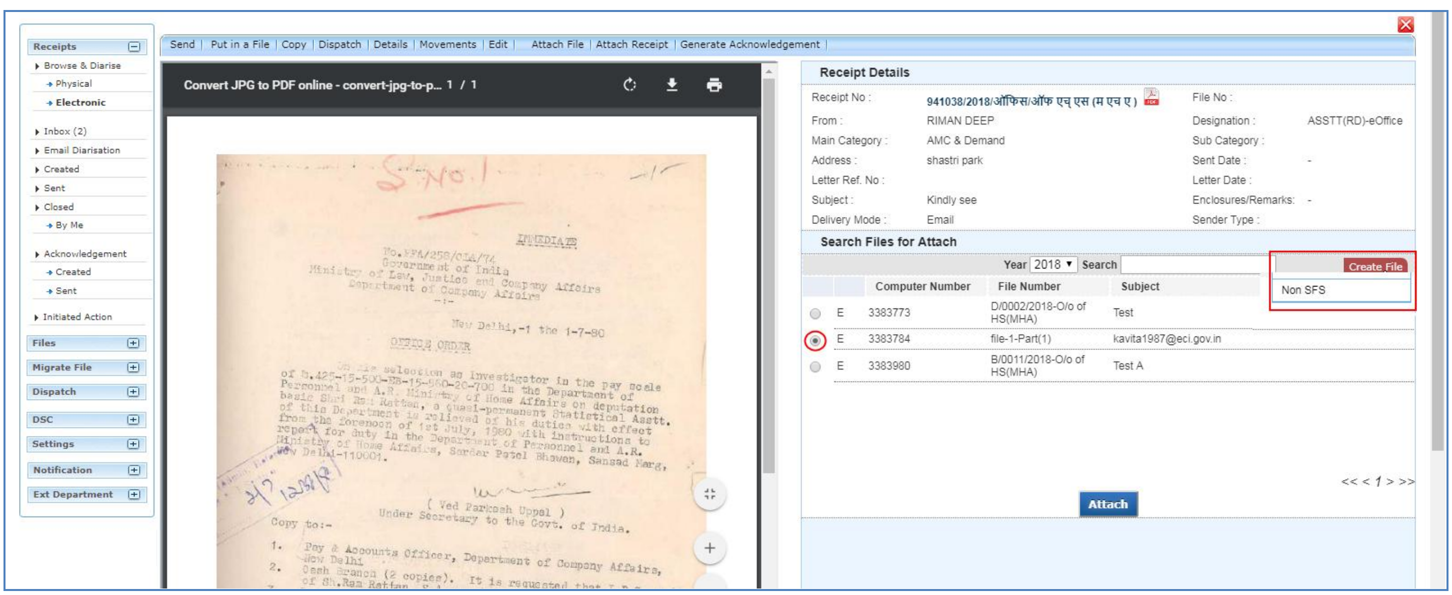


Fig.18

Note:

A **New File** (SFS File) can also be created from the receipt Put in a File list screen using Create File button. This feature is configurable.

- Click **Create File** button and click **Non-SFS,** from dropdown menu. The new file creation screen appears, as shown below in **Fig.19**:

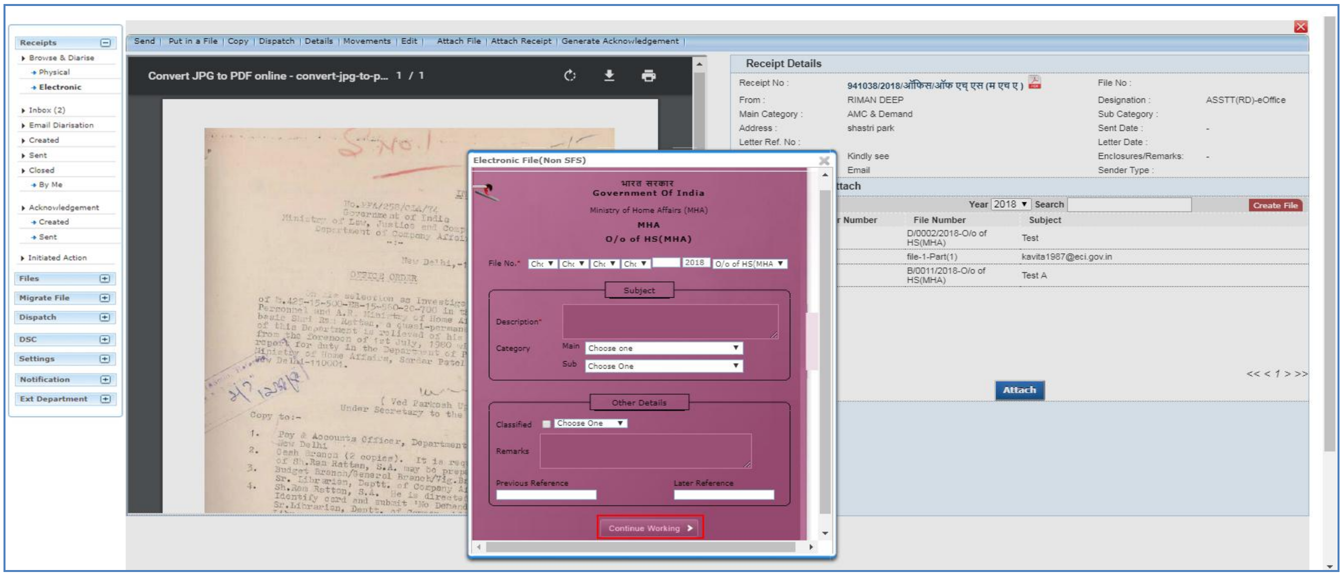


Fig.19

- Click **Continue Working >** button, the receipt gets attached in the correspondences of the created file.

Note:

Once the receipt is put inside a file, the receipt will be removed from the created receipts list.

3. **Copy**: It can be used, in cases where DAK/ letter are diarized for same subject nature. Generates the Receipt Number and redirects the user to diary screen retaining the content (pdf) and metadata (***Copying the pdf content is configurable feature***) of the receipt.

4. **Dispatch**: It is a process of issuing an official reply to the concerned sender (user/department/ministry) after the approval from the internal competent authority.

   To Dispatch an issue against a Receipt, perform the following steps:

   - Click the **Dispatch** tab, a confirmation pop-up message appears, as shown in **Fig.20**:

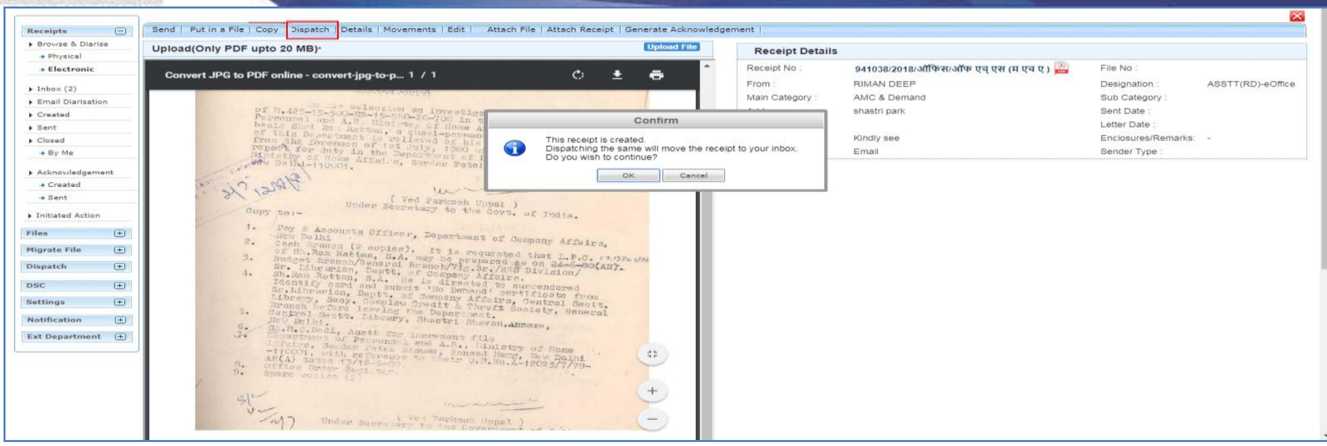


Fig.20

- After confirming, the dispatch screen is displayed with the pre-filled receipt metadata on right side.
- The generated receipt will be moved to the Inbox for dispatching.
- To create the Draft for Approval (DFA), type the draft content or copy the content from already created word/ text files and paste it or choose a pre-defined template by clicking Choose from Template(s) or upload the doc/ pdf by clicking Upload File button.
- After creating the DFA, click the Save button, **Fig.21**:

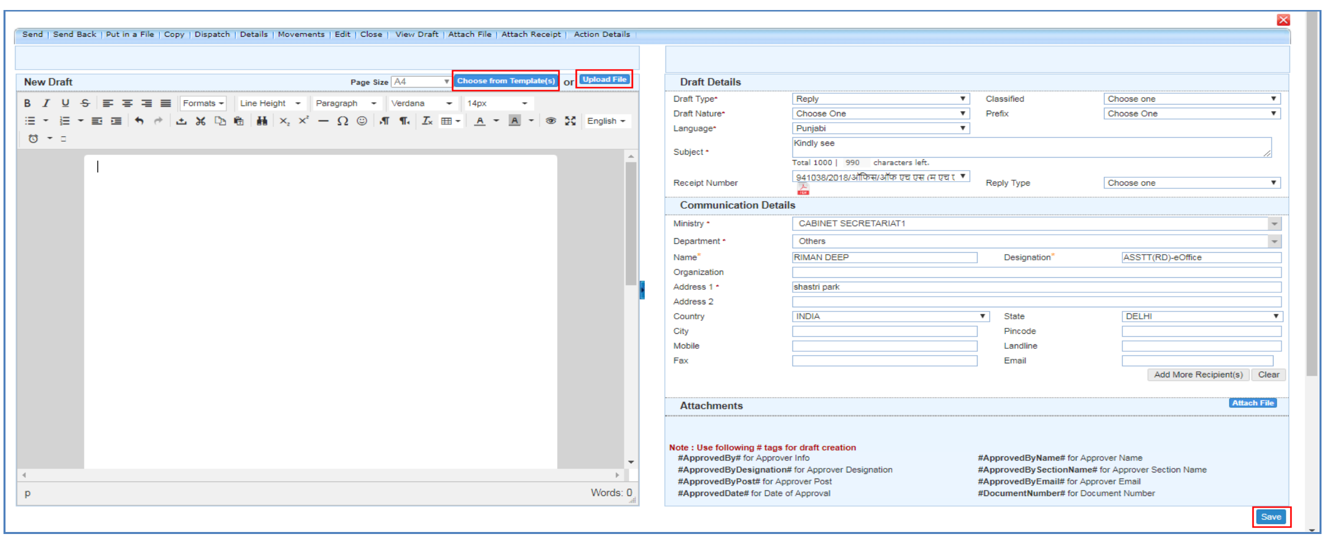


Fig.21

- A unique **Draft Number** is assigned to the draft, as shown in **Fig.22**:

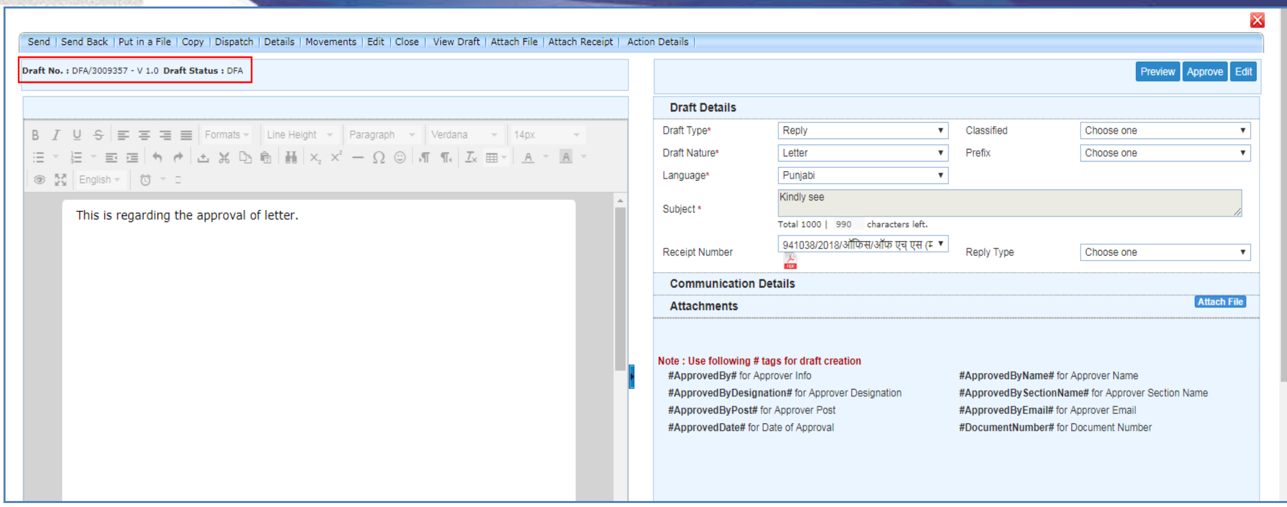


Fig.22

- A newly created draft has three actions:

  a) **Preview**: View the Draft content before approval.

  b) **Approve**: To finalise the DFA. Once the draft is approved no further changes in the content can be done. Only the communication details can be edited.

  c) **Edit**: To make the necessary changes in DFA. Each editing of the draft will create a new version of the draft once the receipt along with the draft is moved to the next user.

Note:

The Approve button is visible only to users having role of Draft Approver.

- Once Approve button is clicked, an approval confirmation popup appears. Click OK button, the Draft gets approved as shown in **Fig.23** & **Fig.24**:

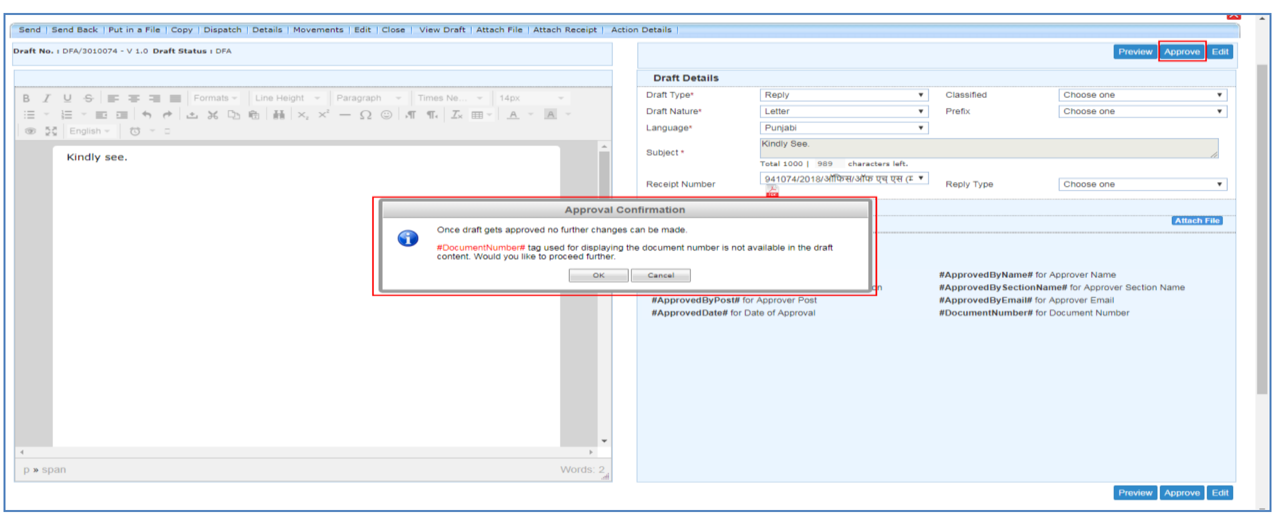


Fig.23

- After approving of the draft the actions available are shown in **Fig.24**:

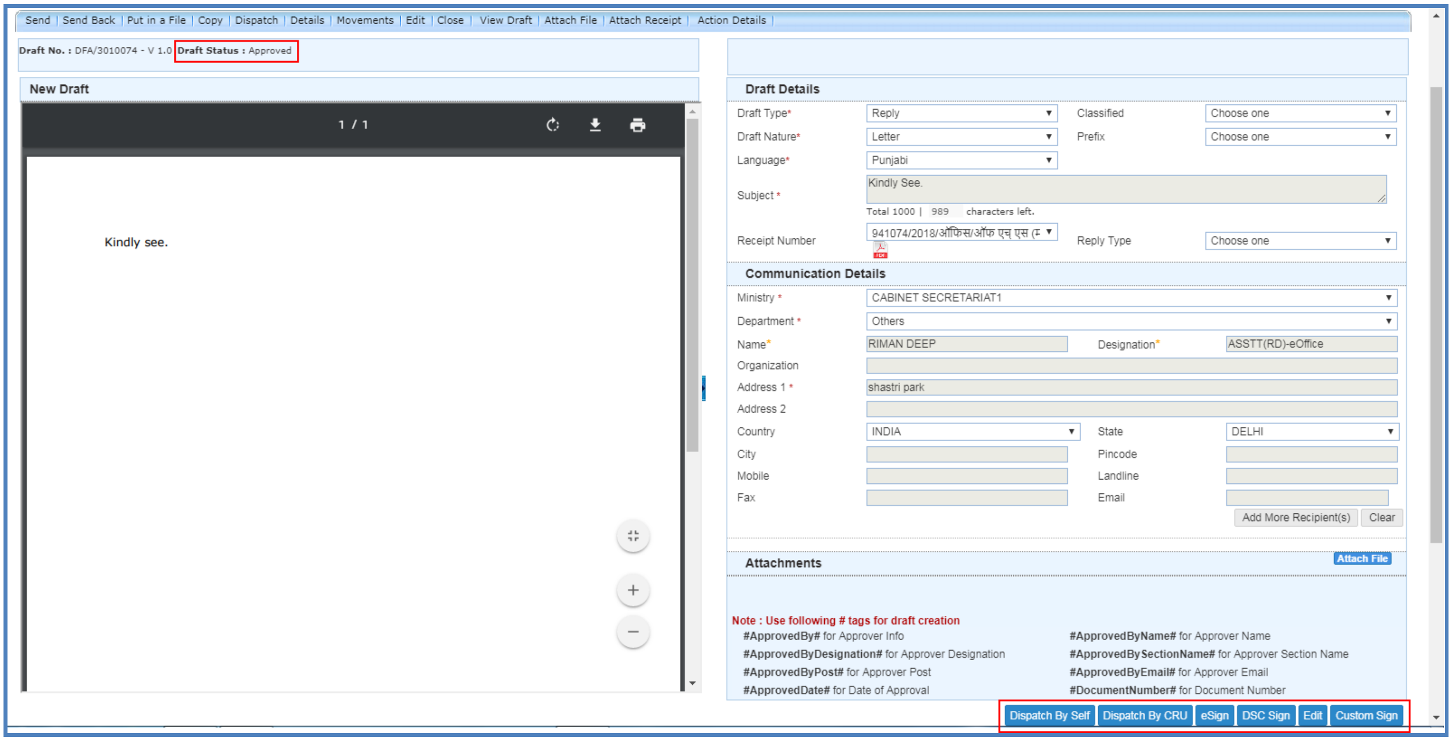


Fig.24

a) **Edit**: To modify the Communication Details only in the approved DFA.

b) **DSC sign**: To sign the approved DFA with digital signature using DSC token device.

Note:

For complete process refer to Annexure-III (Digital signing of DFA)

c) **eSign**: To sign the approved DFA with digital signature using Aadhaar authentication.

Note:

For complete process refer to Annexure-IV (eSigning of DFA)

d) **Custom Sign**: The provision to select the desired location in the approved draft to DSC sign / eSign.

Note:

For complete process refer to Annexure-III (Custom Digital Signing of DFA) & Annexure-IV (Custom eSigning of DFA)

e) **Dispatch By Self**: It is used, if the person, who has the receipt with the approved/ signed draft, wants to dispatch (send the issue) himself/ herself. The issue can be dispatched electronically through mail (by using "Email Details") or physically through post (by using "Postal & Out Register Details").

- Further the two options **Send with Follow-up** and **Send without Follow-up** appears, as shown in **Fig.25**.

➢ **Send with follow-up:** It helps to set a follow up notification in anticipation of a reply which could be received against the dispatched letter.

- Click Send With Followup button, select the required action, enter the description message and due date for the follow-up and click OK button, as shown in **Fig.25**:

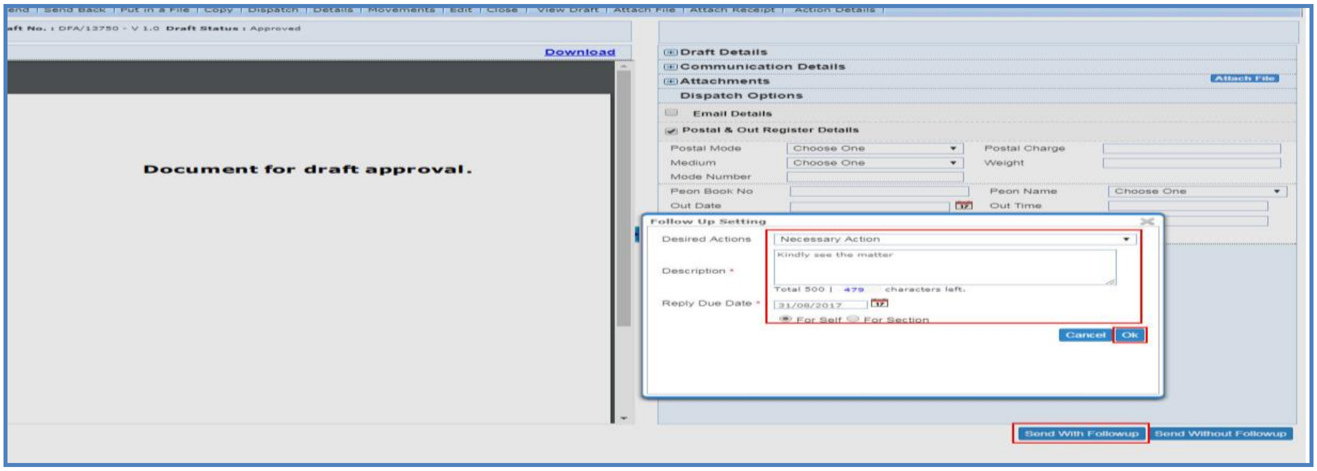


Fig.25

Note:

For Self: The user who has dispatched the receipt can view the details under Notification Dispatch Followups sub-module.

For Section: Every user in the section can view the details under his/ her Notification Dispatch Followups sub-module.

- The draft gets dispatched, and an entry of the dispatched draft gets displayed in **Sent** sub-module under "**Dispatch module**" with status "**Issued and dispatched**" as shown in **Fig.26**:

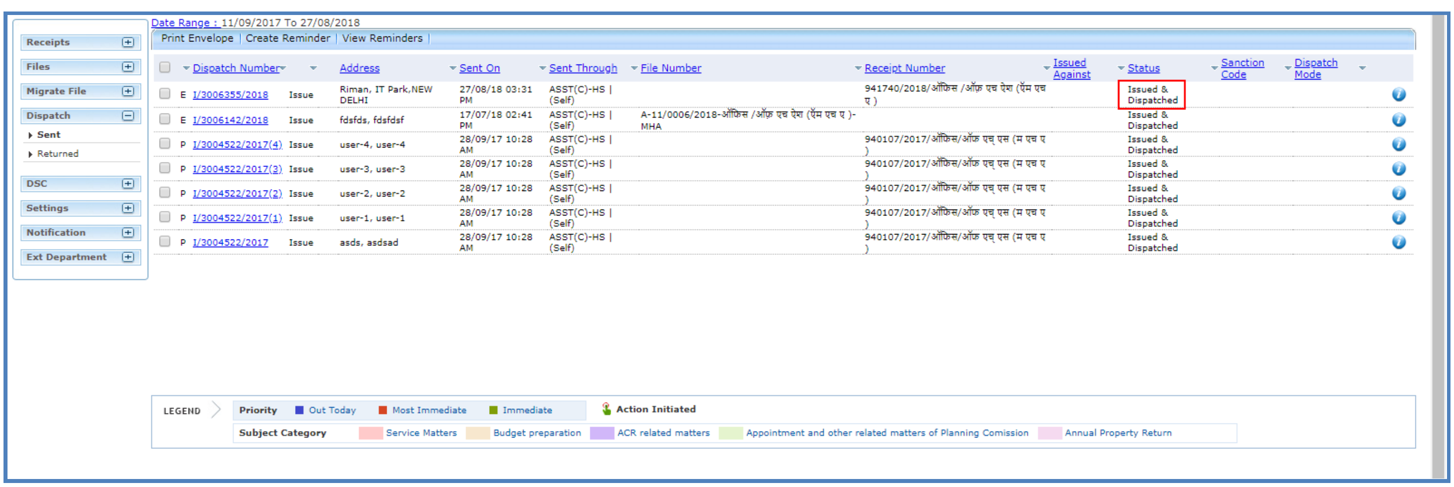


Fig.26

- If the reply is not received against the issue then a reminder could be sent.
  - To send the Reminder click **Sent** sub-module under **Dispatch** module.
  - Select the Issue for which reminder is to send and then click Create Reminder tab.
  - The draft window appears with Draft Type as '**Reminder**'.
  - To create the Draft for Approval (DFA), type the draft content or copy the content from already created word/ text files and paste it or choose a pre-defined template by clicking Choose from Template(s) or upload the doc/ pdf by clicking Upload File button.

➢ **Send without Follow-up**: No follow up notification is set for the dispatch.

- Click Send Without Followup button, the draft gets dispatched, and an entry of the dispatched draft gets displayed in **Sent** sub-module under "**Dispatch module**" with status "**Issued and dispatched**" as shown in **Fig.27**:

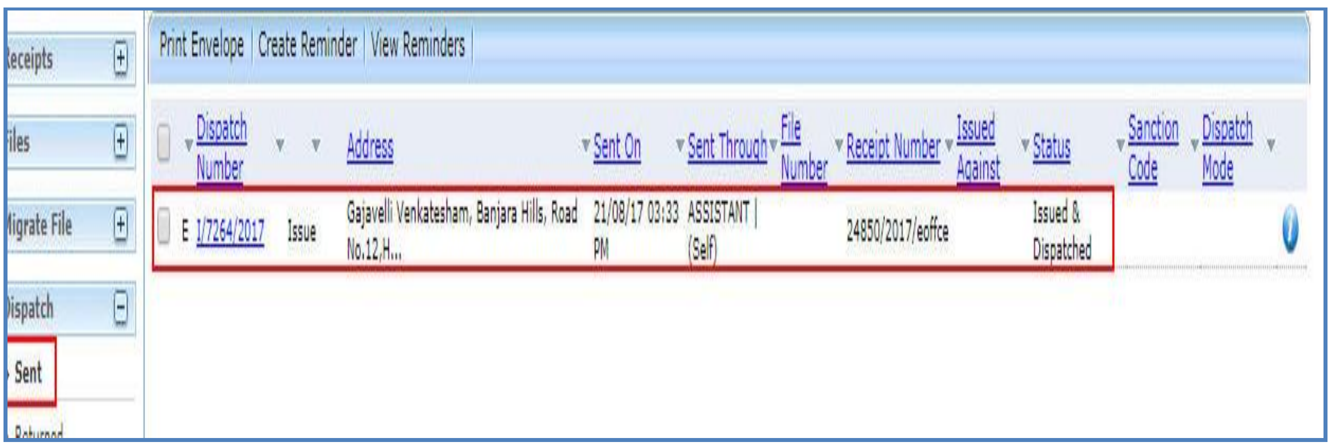


Fig.27

f) **Dispatch By CRU**: It is used, if the person, who has the receipt with the approved draft, wants the issue to be dispatched (send the issue) by the CRU, then the issue can be dispatched physically through post (by using "Postal & Out Register Details").

- Click **Dispatch By CRU** button, it will show all the users mapped with CRU section along with, Delivery Mode and Remarks (directions) for CRU, as shown in **Fig.28**:

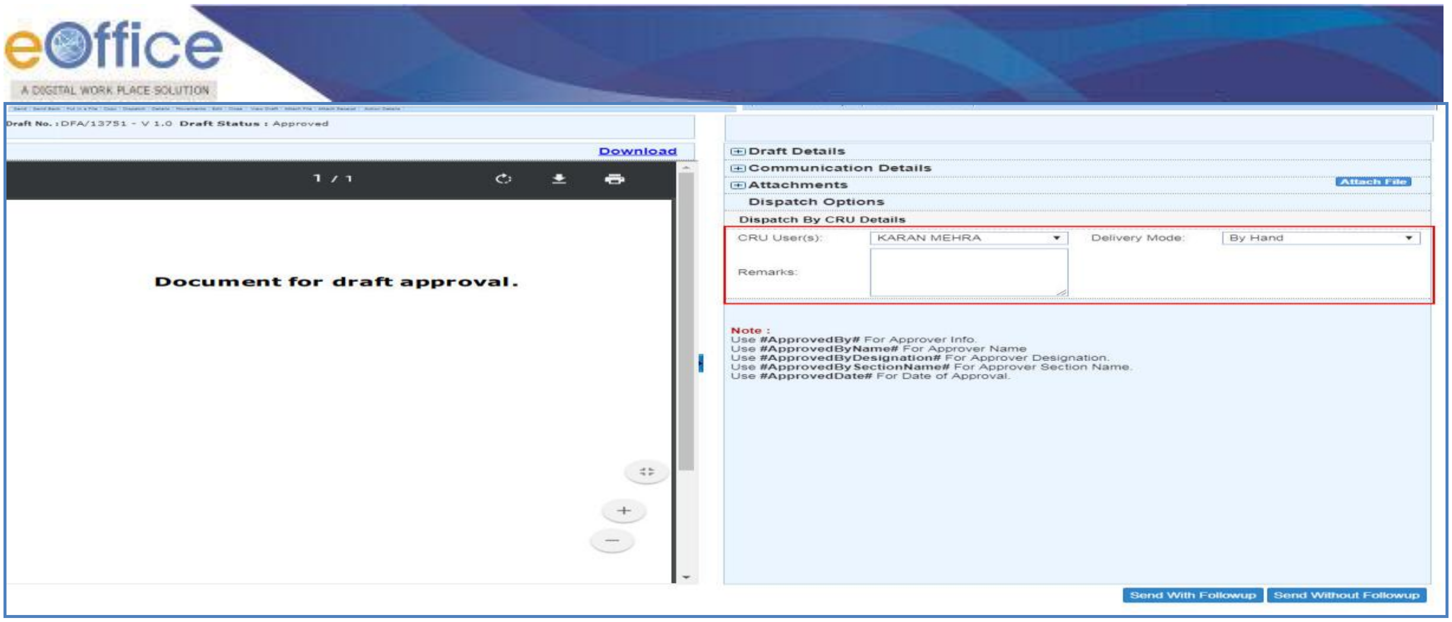


Fig.28

- Once the dispatch is sent to CRU, the record of same will be displayed in user's **Sent** sub-module under "**Dispatch module**" with status "**Issued and sent**" as shown in **Fig.29**:

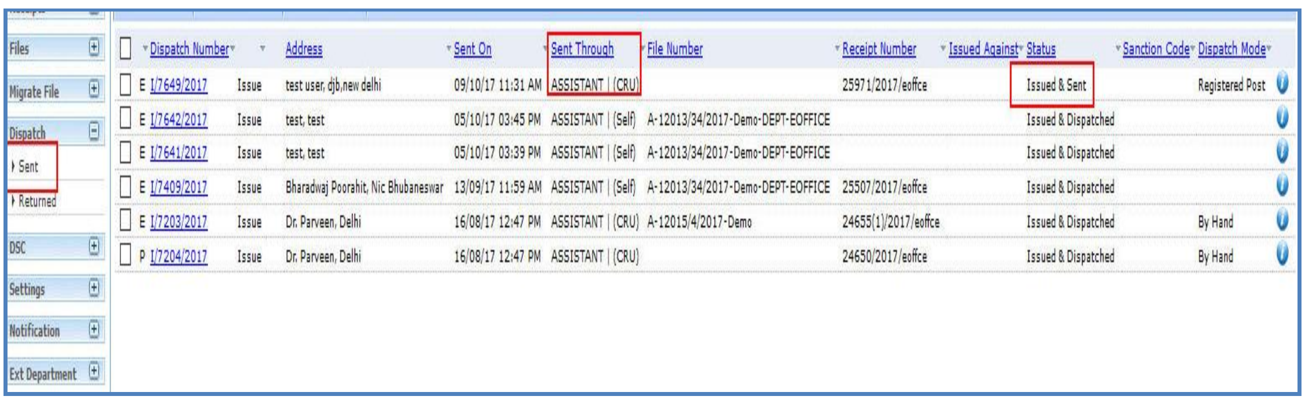


Fig.29

- The CRU receives the dispatch in his/ her dispatch inbox. This is to be finally dispatched outside the organization through physical medium or as described by the sender in Delivery Mode.

- In case if issues/ reply have any discrepancies then the CRU can return the issue/reply back to the section officer.

- The returned issue/ reply moves under **Dispatch 'Returned'** sub-module of section officer.

Note:

For Dispatch by CRU (Send With Followup and Send Without Followup) process, refer Dispatch By self (Send With Followup and Send Without Followup).

5. **Details**: It can be used to view dispatch history, list of attached files, list of attached receipts, detached receipts history and detached files history, as shown in **Fig.30**:

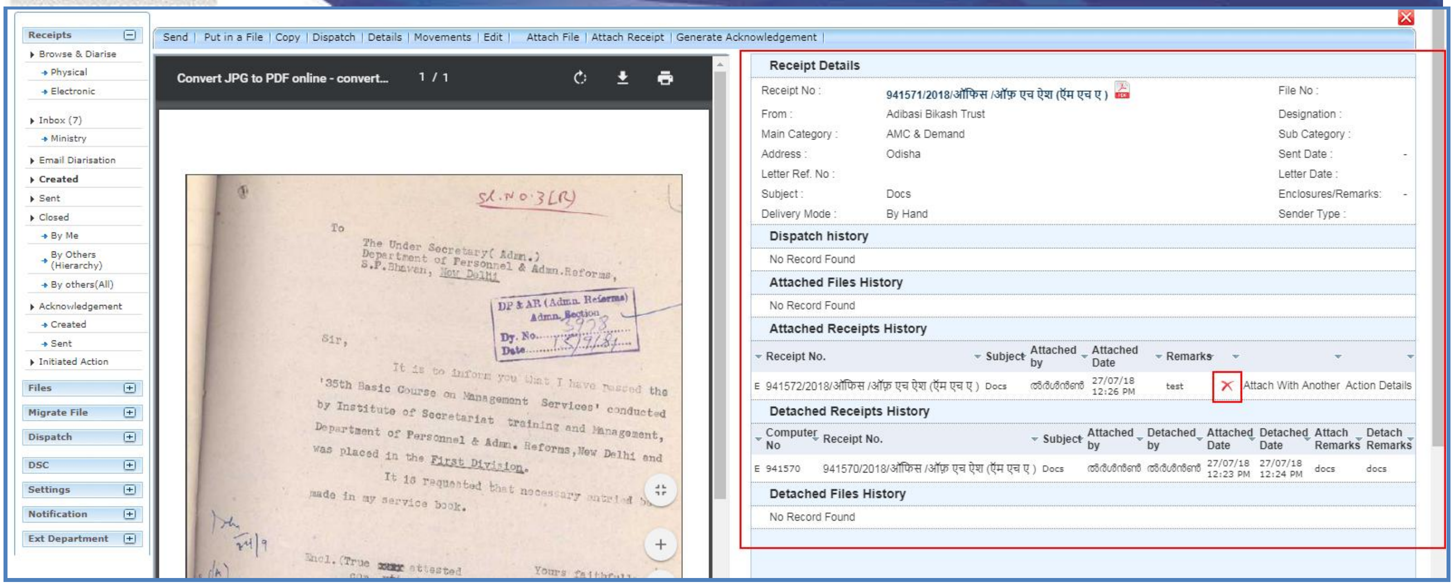


Fig.30

Note:

In case any receipt(s) or file(s) are attached to the receipt, then user can detach them from the receipt details page using ( ) icon.

6. **Movements:** This option is used to track the **Movements** of the receipt which automatically gets updated as Receipt moves from user to another as shown in **Fig.31:**

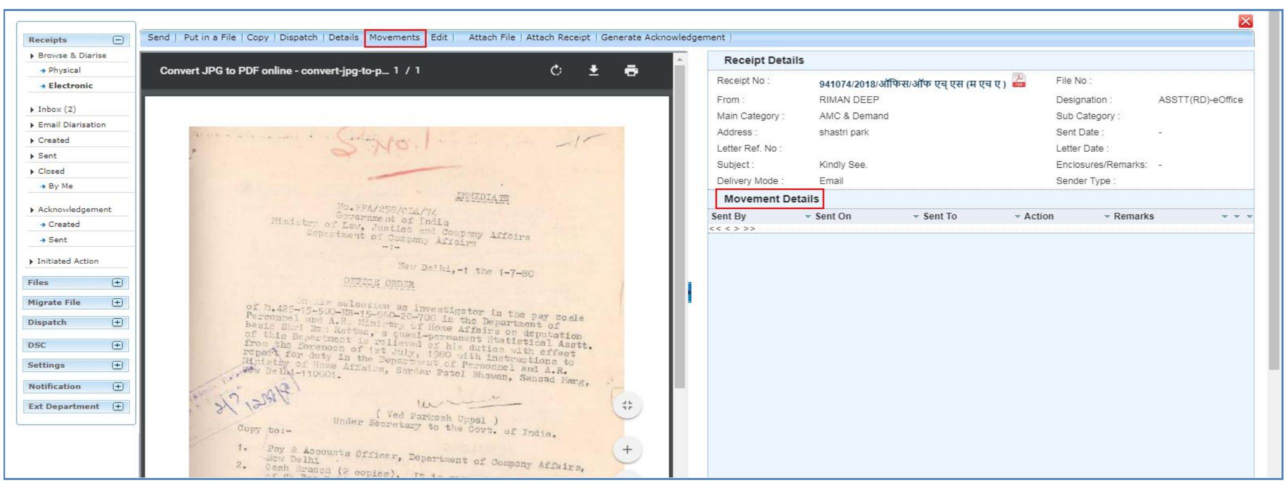


Fig.31

7. **Edit**: It can be used to edit the different metadata fields on the right and the PDF content on the left of the Receipt before sending it to the intended recipient(s).

   To edit the generated receipt, to perform following steps:

   - Click Edit tab, the metadata fields get active, as shown in **Fig.32**:

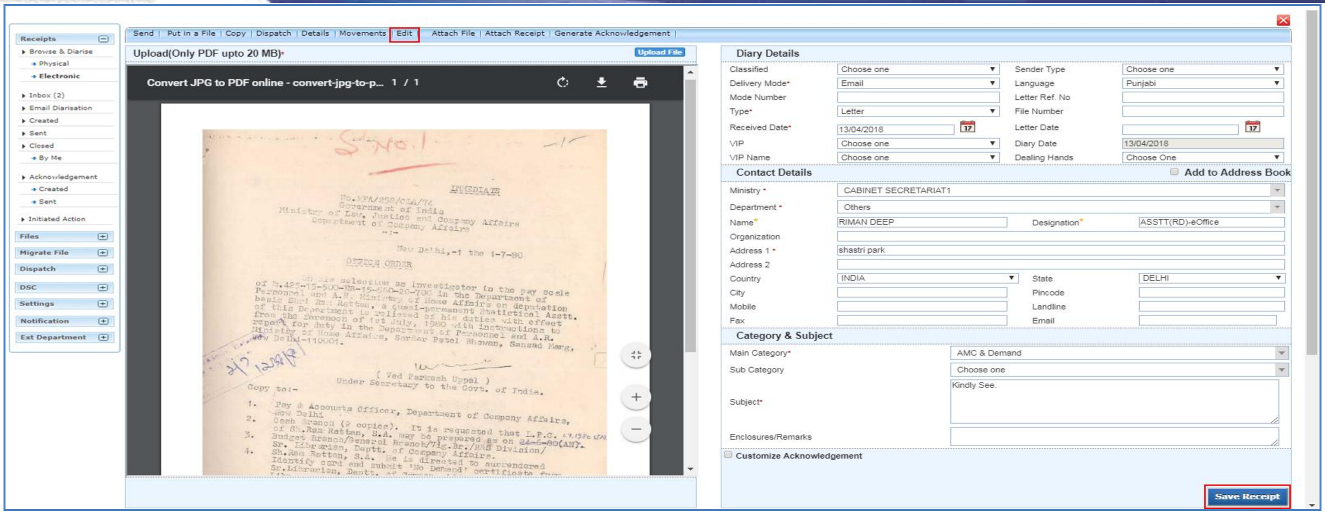


Fig.32

- After making required changes, click the **Save Receipt** button to save metadata (**Fig.32**).

8. **Attach File:** This option is used to refer any file with the current receipt, if the decision taken on the file has any implication on the current receipt.

Note:

Physical File/Electronic File can be attached with an Electronic Receipt and same action can be done with Physical Receipt.

To attach a file to a receipt, perform the following steps:

- Click the Attach File tab, as shown in **Fig.33**:

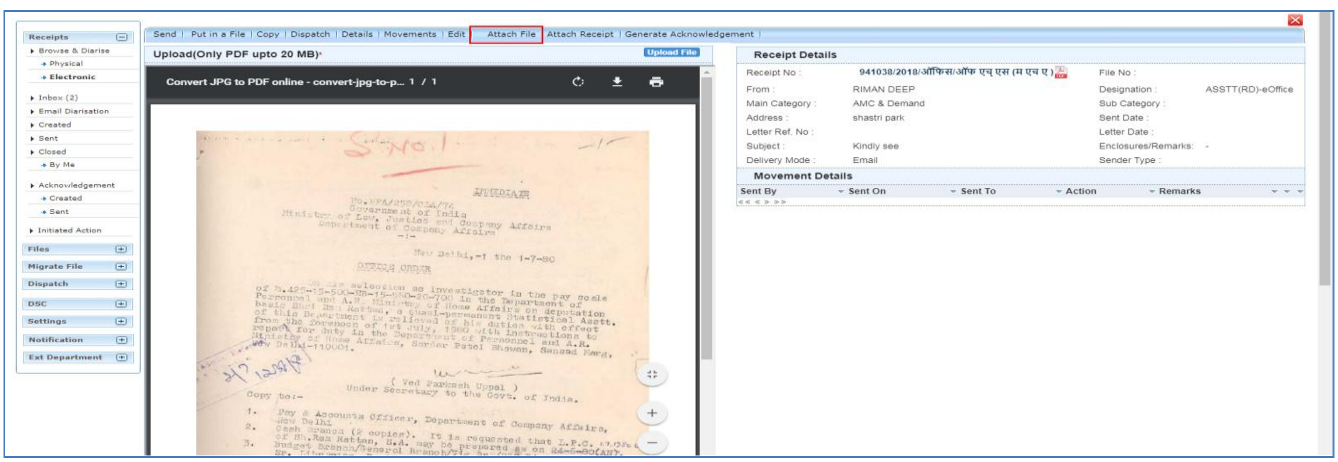


Fig.33

- A list of files appears, select the file and click Attach File button, as shown in **Fig.34**.
- User can also search for the file using Year and Search fields.

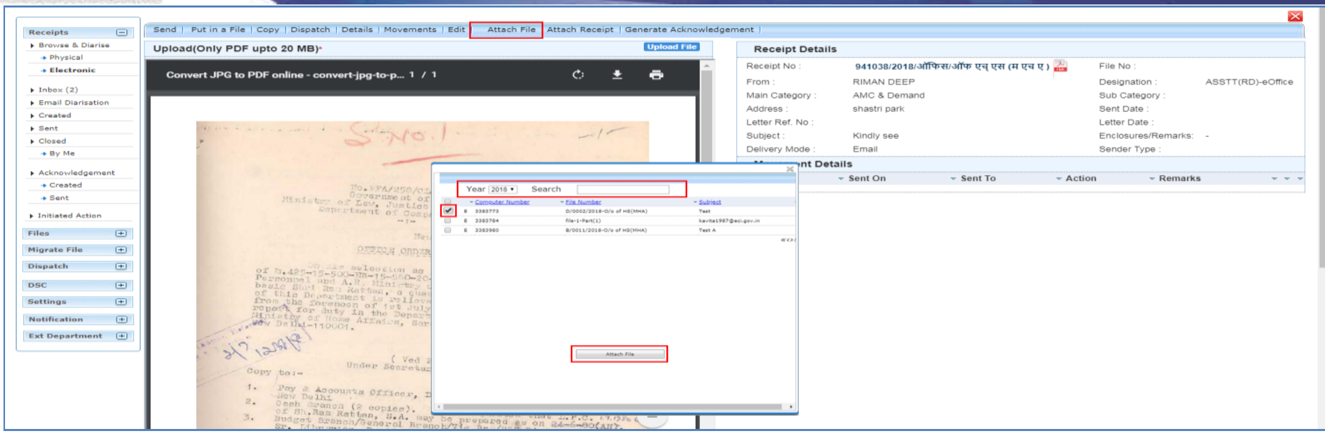


Fig.34

Note:

The list contains files which are present in 'Created (Completed)' or 'Inbox' section of File.

- Attach File pop-up appears, enter the **Remark** and click **OK** button as shown in **Fig.35:**

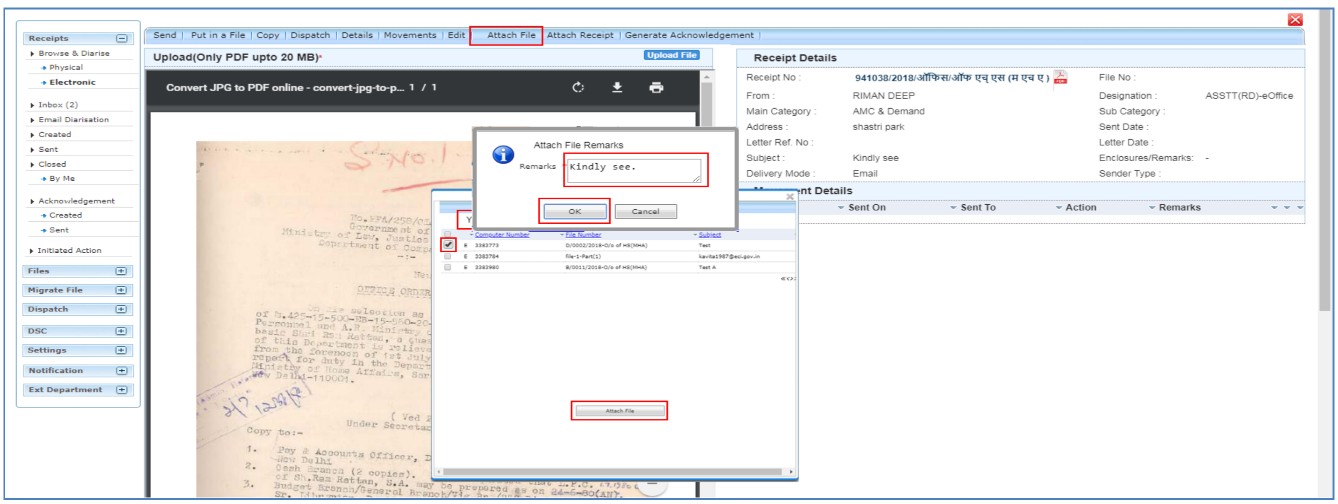


Fig.35

- The selected file then gets attached with the Receipt and moves along with the movement of Receipt as shown in **Fig.36**:

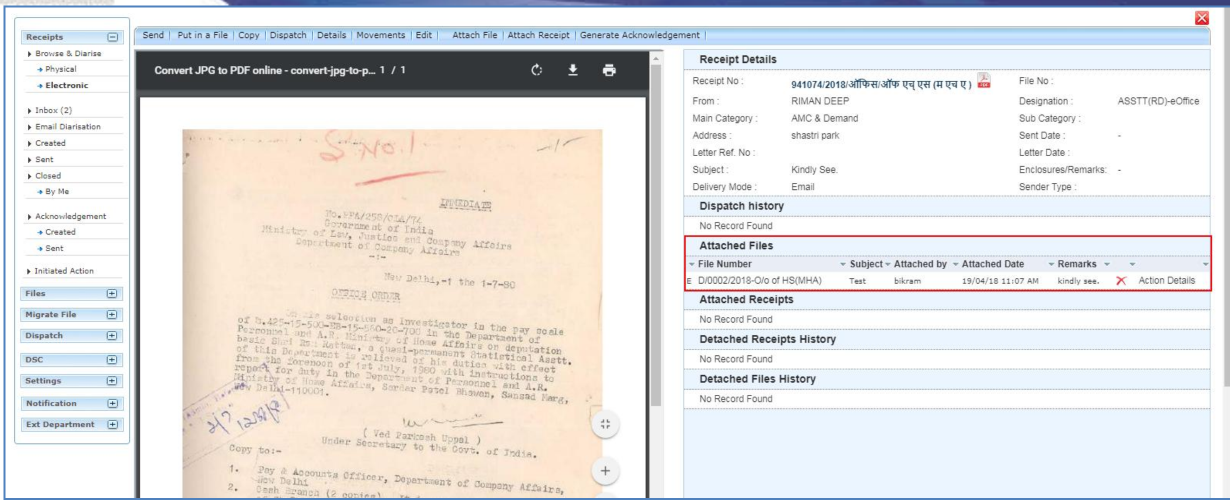


Fig.36

Detach File- Will detach a file from the receipt.

- The file can be detached from receipt on clicking “X” button in the Attached Files section (**Fig.36**).
- The detached file then moves to the file **Inbox** of the user who has detached the file.

9. **Attach Receipt**: This option is used to refer to any receipt with the current receipt, if there is any implication of the decision taken in any receipt on the current receipt.

Note:

Physical Receipt can be attached only with Physical receipt.

In case of Electronic Receipt both Electronic & Physical Receipt (with PDF uploaded) can be attached.

To attach other receipt(s) with the working receipt, perform following steps:

- Click the Attach Receipt tab, as shown in **Fig.37**:

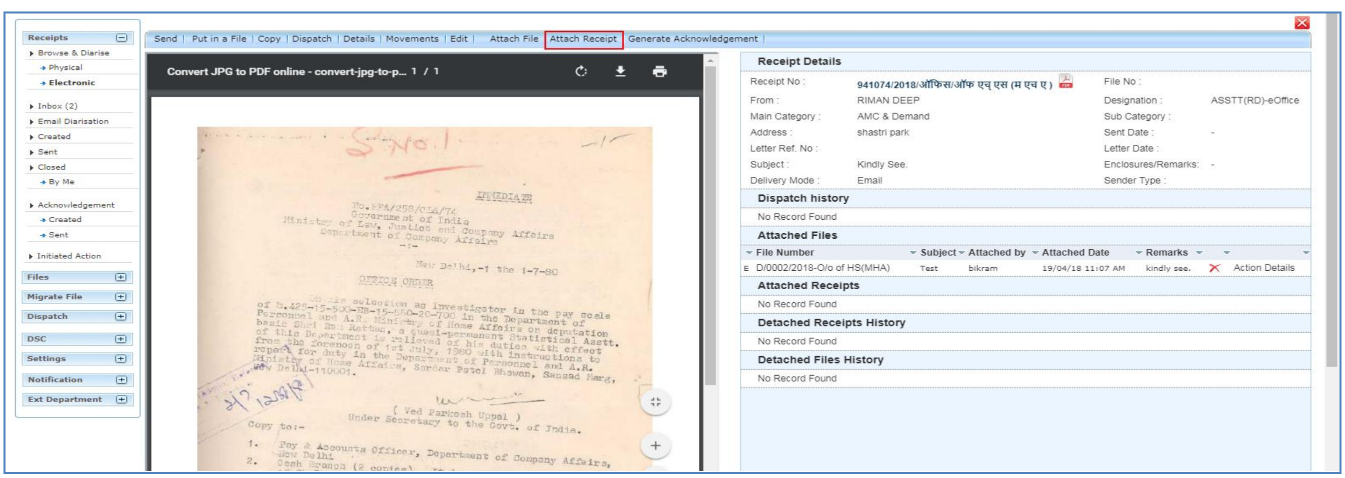


Fig.37

- A list of receipts appears, select the receipt and click **Attach Receipt** button, as shown in **Fig.38**.
- User can also search for the receipt using Year and Search fields.

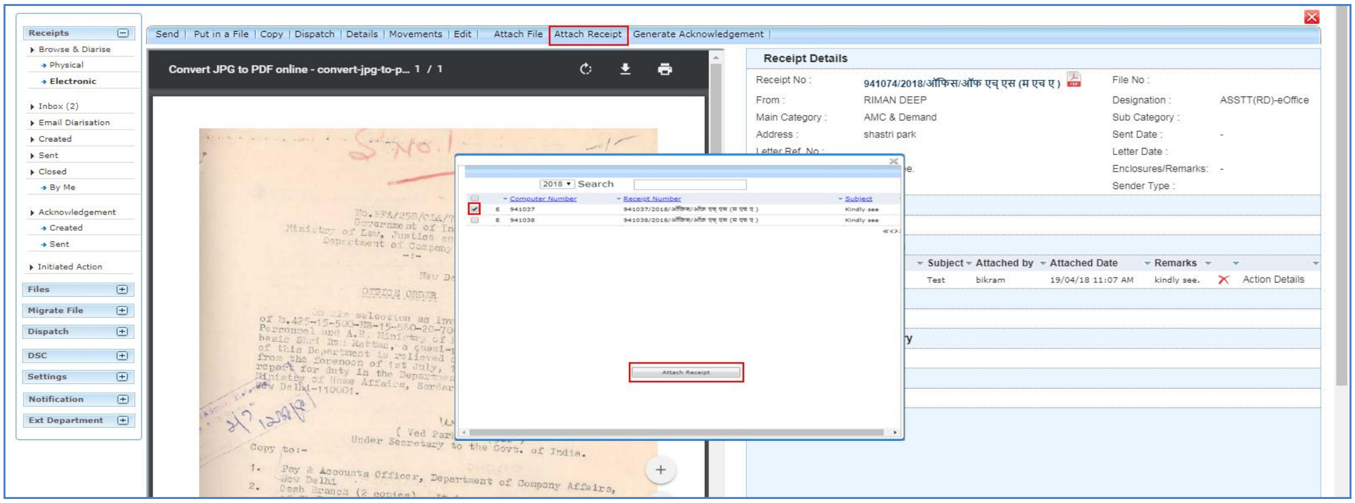


Fig.38

Note:

The list contains receipts which are present in 'Created (Completed)' or 'Inbox' sub-module of Receipt.

- Attach Receipt pop-up appears, enter the **Remark** and click **OK** button as shown in **Fig.39**:

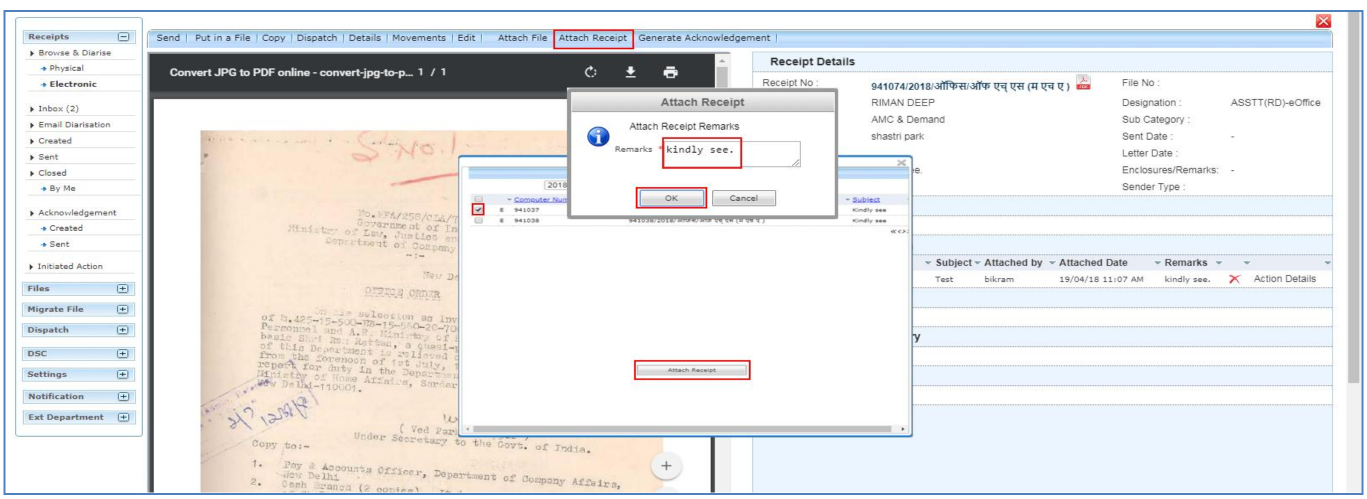


Fig.39

- The selected receipt then gets attached with the Receipt and moves along with the movement of Receipt as shown in **Fig.40**:

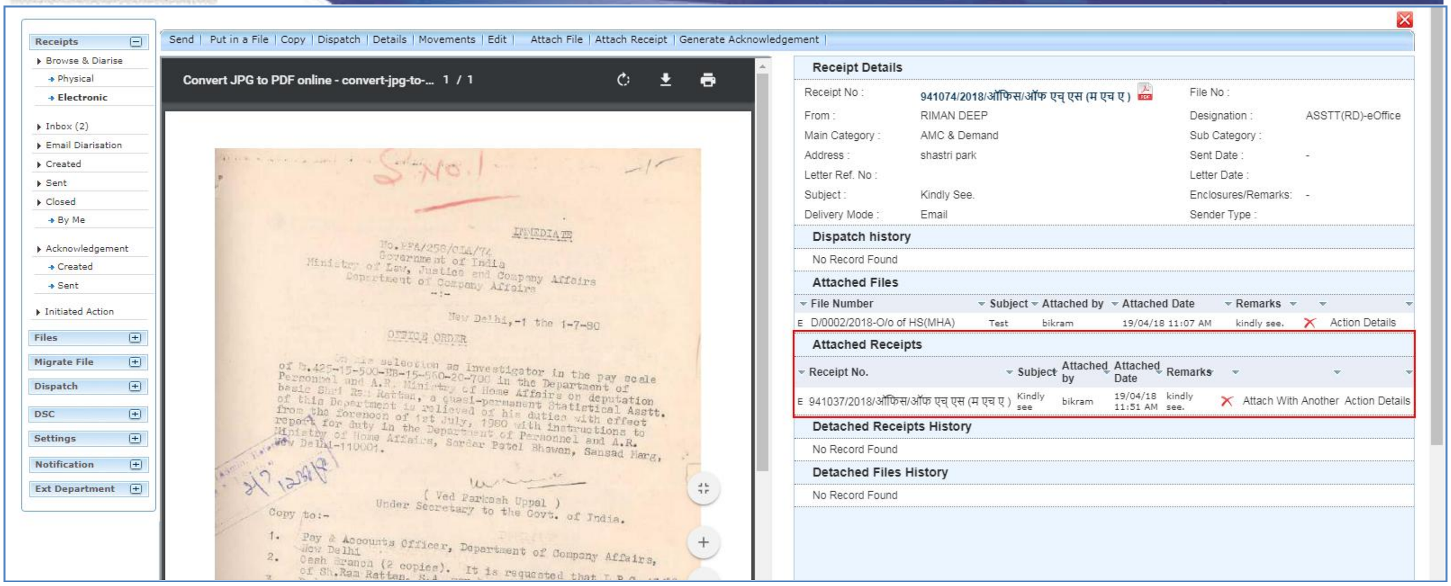


Fig.40

Detach Receipt- Will detach a receipt from the Receipt.

- The receipt can be detached from receipt on clicking " " button in the Attached receipt section (**Fig.40**).
- The detached receipt is moved to the receipt Inbox of the user who had detached the receipt.

10. **Generate Acknowledgement**: There is a provision to acknowledge the user who has sent the letter that has been received in the organization.

Note:

For steps to Generate Acknowledgement refer Acknowledgement sub-module.

Physical DAK/ letter Diarisation

In Physical DAK/ letter the **Browsing** and **Uploading of Correspondence** is **Non- Mandatory**, rest of the process is same to electronic diarisation.

To diaries the Physical DAK/ letter, perform the following steps:

- Click the **Physical** link under **Browse & Diarise** sub-module. The screen as shown in **Fig.41** appears:

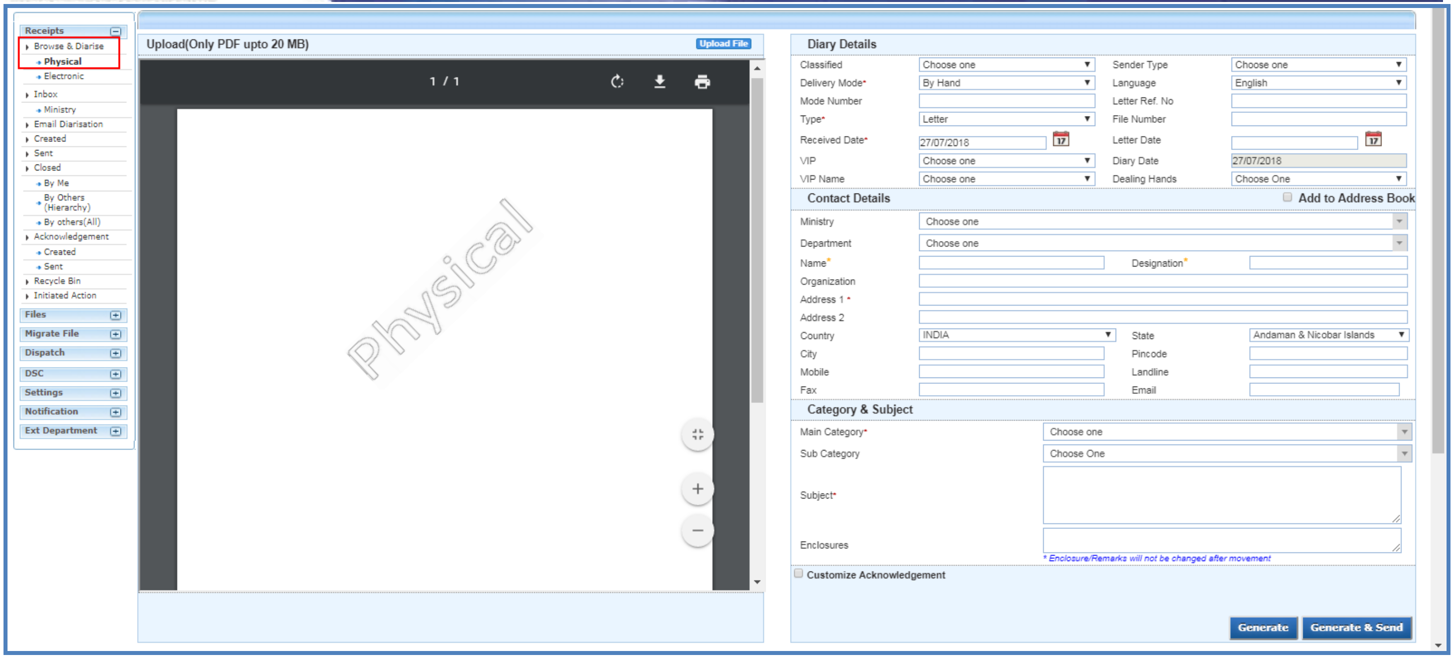


Fig.41

Note:

For further **Browse and Diarise Process** of **Physical Receipt**, refer to Browse and Diarise process of Electronic Receipt.

Inbox

Receipt Inbox sub module displays all the **incoming** receipts that have been marked to the logged in user, as shown in **Fig.42**:

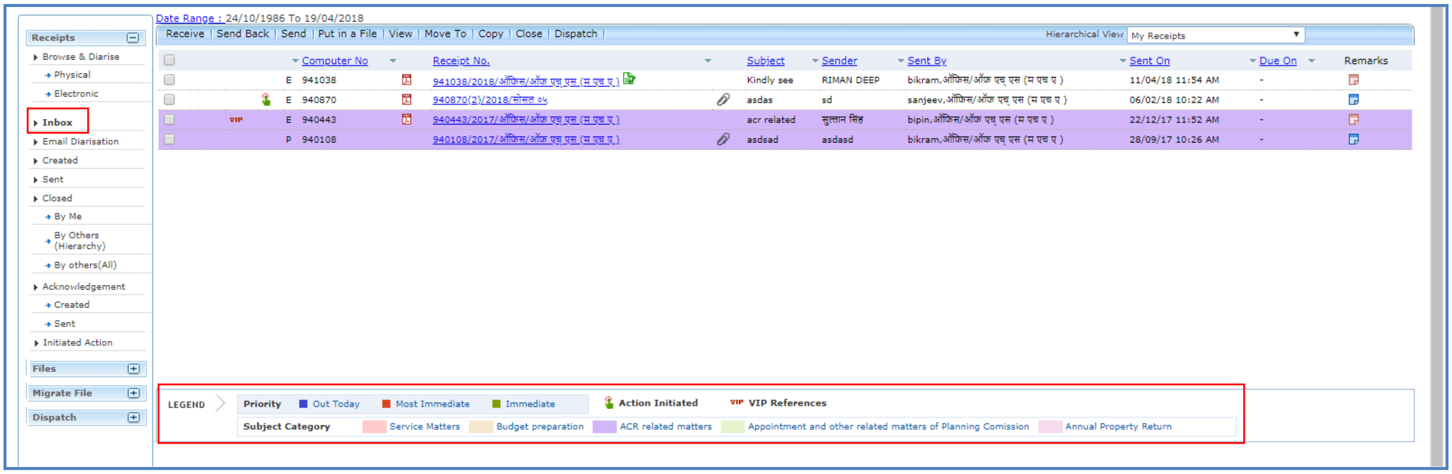


Fig.42

- There are legends displayed within the **Receipt's Inbox,** which provide additional information like urgency grading and other tags defining necessary details about the receipts, as shown in **Fig.42.**

Note:

Receipts/ Files of different subject category in the Inbox/ Created/ Sent list can be demarcated by color coding (max. 5 subject category are allowed)**.** This feature is configurable.

- Along with these details few action tabs are also defined, as shown in **Fig.43**:

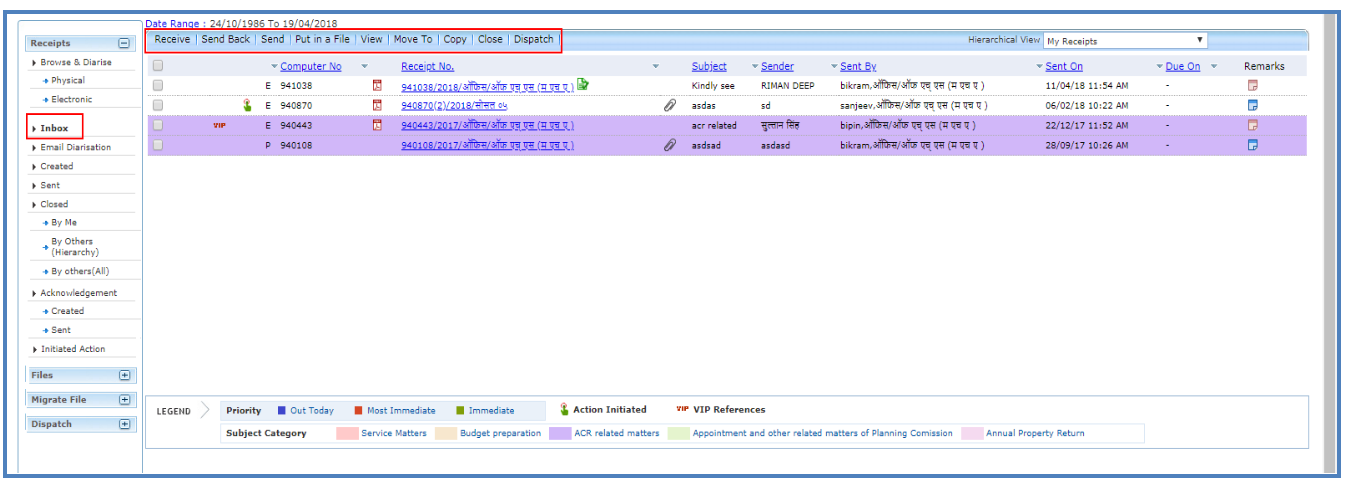


Fig.43

a) **Receive**: It is used to receive the Physical Receipts as shown in the **Fig.44**. Without receiving the physical receipt user cannot take any action on that particular receipt.

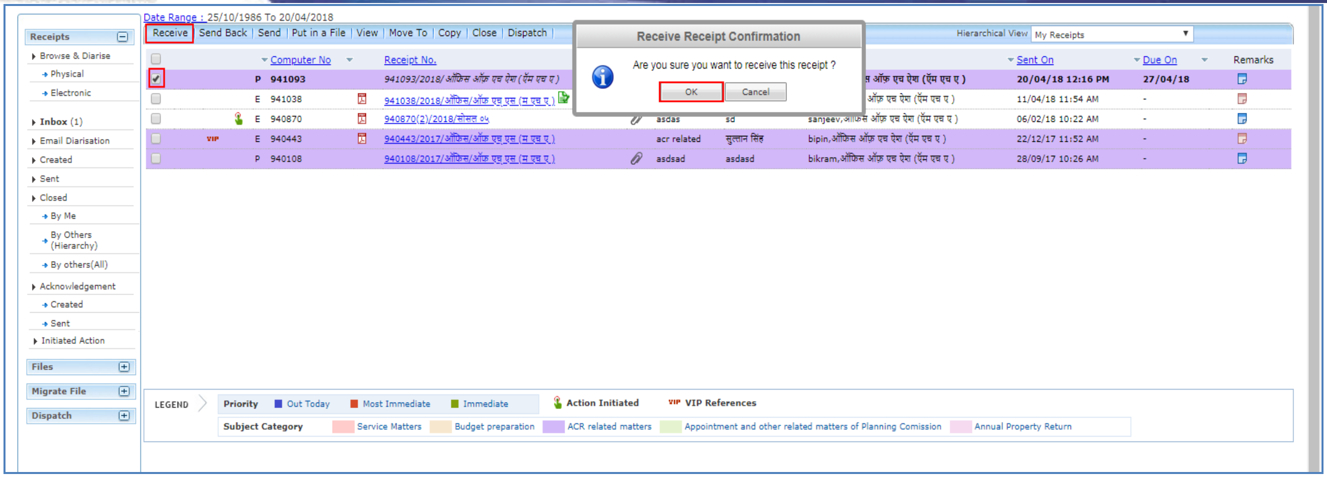


Fig.44

b) **Send Back**: It is used to send the receipt back to the sender of the Receipt.

- Select the receipt and click Send Back tab as shown in **Fig.45**:

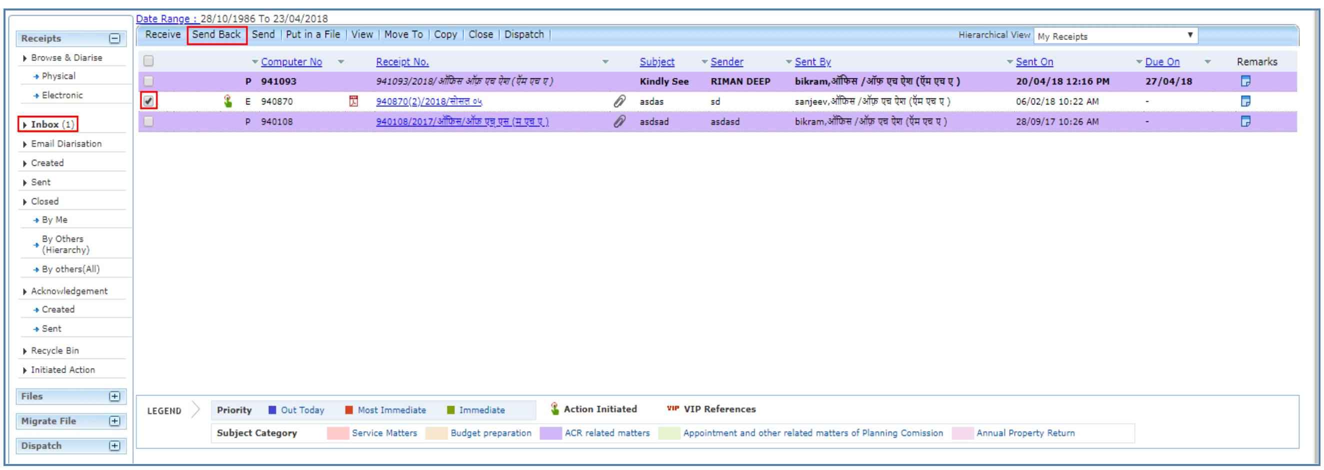


Fig.45

- The **Send screen** with the **To** field auto populated with the name of the previous sender appears, as shown in **Fig.46**:

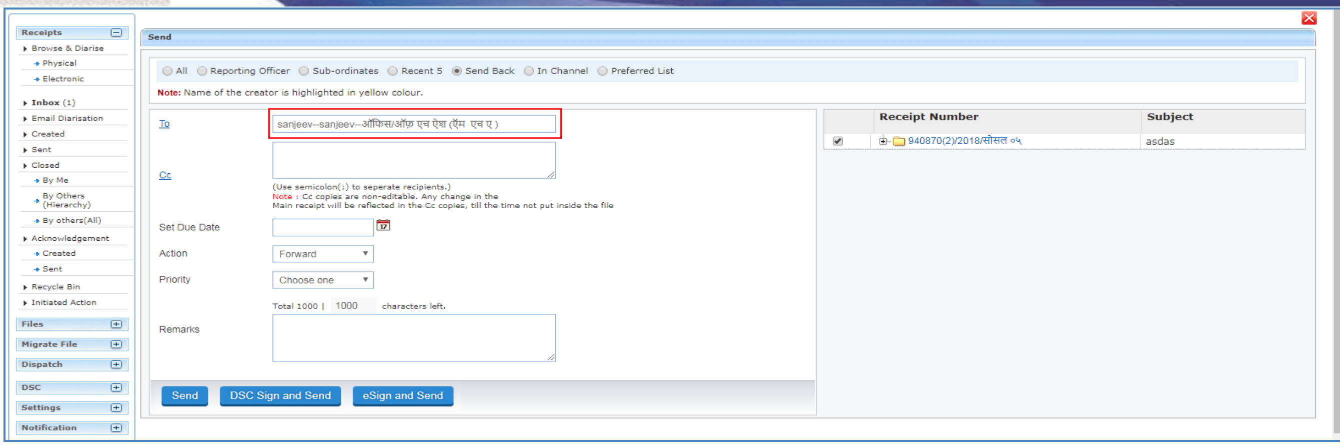


Fig.46

Note:

Refer the steps mentioned under Send action tab of Receipt Browse and Diaries sub-module.

c) **Send**: This option facilitates the user to mark the receipt to the intended recipient(s).

Note:

Refer the steps mentioned under Send action tab of Receipt Browse and Diaries sub-module.

d) **Put in a File**: To **put** the **receipt** into a **concerned file**.

Note:

Refer the steps mentioned under Put in a File action tab of Receipt Browse and Diaries sub-module.

e) **View**: It is used to sort the receipts based on different criteria such as current state, priority, VIP, Due Date etc.

- Keep the cursor on 

tab and a drop down menu will appear with the options as shown in **Fig.47**:

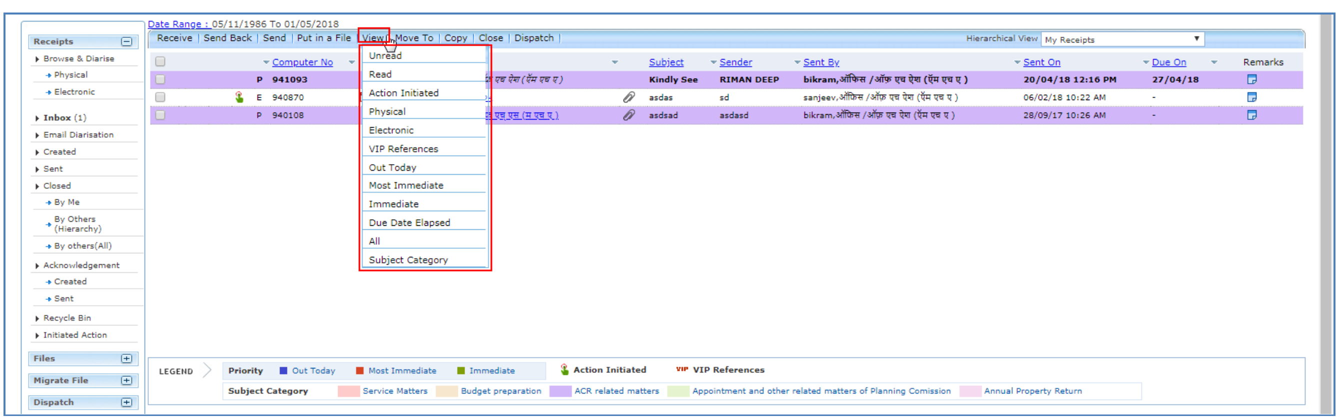


Fig.47

a) **Unread**: To view all unread electronic receipts and unreceived physical receipts.

b) **Read**: To view all read electronic receipts and received physical receipts.

c) **Action Initiated**: To view all the receipts against which initiate action process has been taken up.

d) **Physical**: To view all physical receipts.

e) **Electronic**: To view all electronic receipts.

f) **VIP reference**: To view all the VIP referenced receipts.

g) **Out today**: To view all the receipts those are marked with priority as Out Today.

h) **Most Immediate**: To view all the receipts those are marked with priority as Most Immediate.

i) **Immediate**: To view all the Prioritized receipt marked as Immediate.

j) **Due date Elapsed**: To view all those receipts for which due date as set during sending / marking of the receipt has elapsed.

k) **All**: To view all the incoming receipts from the latest to the oldest order (Default View).

l) **Subject Category:** To view all the receipts categorized on the basis of subject Category, as configured in the system

6. **Move To**: It is used to categorize the receipts into subfolders under **Receipt Inbox.**

To create New Folder or manage existing ones, perform the following steps:

- Select receipt(s) from the Receipt Inbox, which needs to be moved.
- Keep the cursor on (Move To) tab, a drop down menu will appear with the options as shown in **Fig.48**:

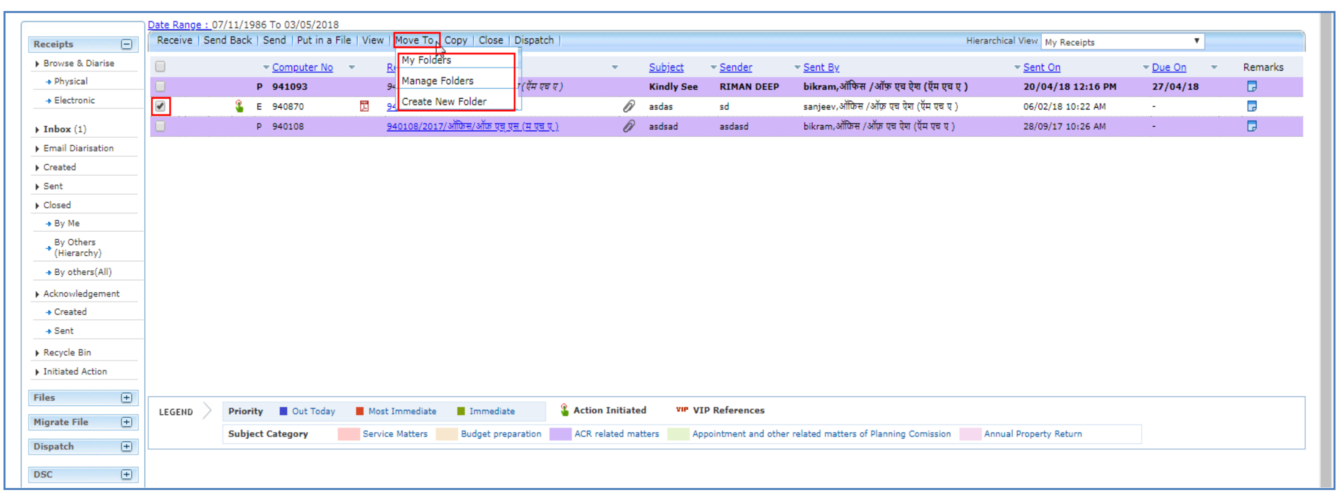


Fig.48

a) **Create New Folder**: Click the **Create New Folder** link from the dropdown, as shown in **Fig.49**:

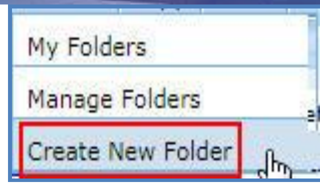


Fig.49

- The screen appears is shown in **Fig.50**. Enter the **Folder Name** and select the Folder in which new folder is to create. Click the Save button as shown in **Fig.50:**

Fig.50

- The new folder is created under **Inbox** as sub folder, as shown in **Fig.51**:

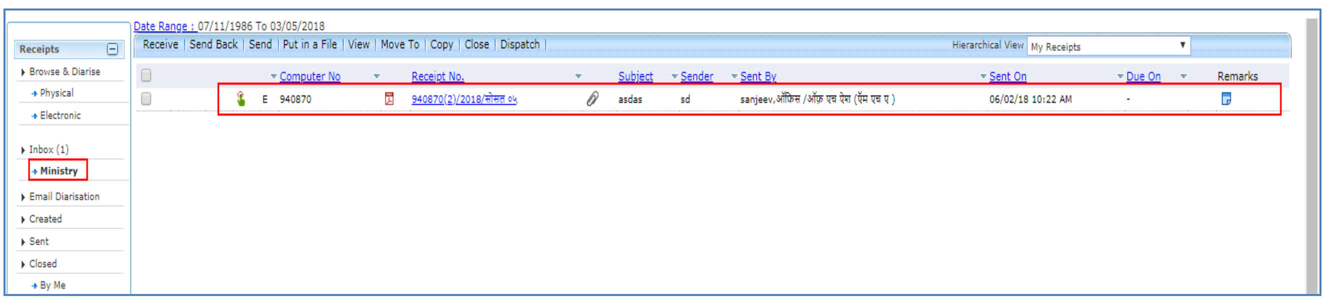


Fig.51

b) **My Folders**: Click the **My Folders** link from the dropdown menu to move the Receipt either in inbox or in its subfolders.

c) **Manage Folders**: Click the **Manage Folders** link from the dropdown menu to **Delete** ( ) or **Edit** ( ) the folders created under Receipt Inbox.

Note:

Above mentioned action are available in sub-folders as well.

7. **Copy**: It can be used, in cases where multiple correspondences of similar nature are received from the same person or organization. Generates the Receipt Number and redirects the user to diary screen retaining the content (pdf) and metadata (***Copying the pdf content is configurable feature***) of the receipt.

8. **Close**: User can close those receipts on which either action is completed or action is not required as per departmental instructions.

To close a receipt following steps needs to be followed:

- Click the Close tab after selecting one or multiple receipts. A popup window of closing confirmation appears. Enter the mandatory closing remarks as shown in **Fig.52**:

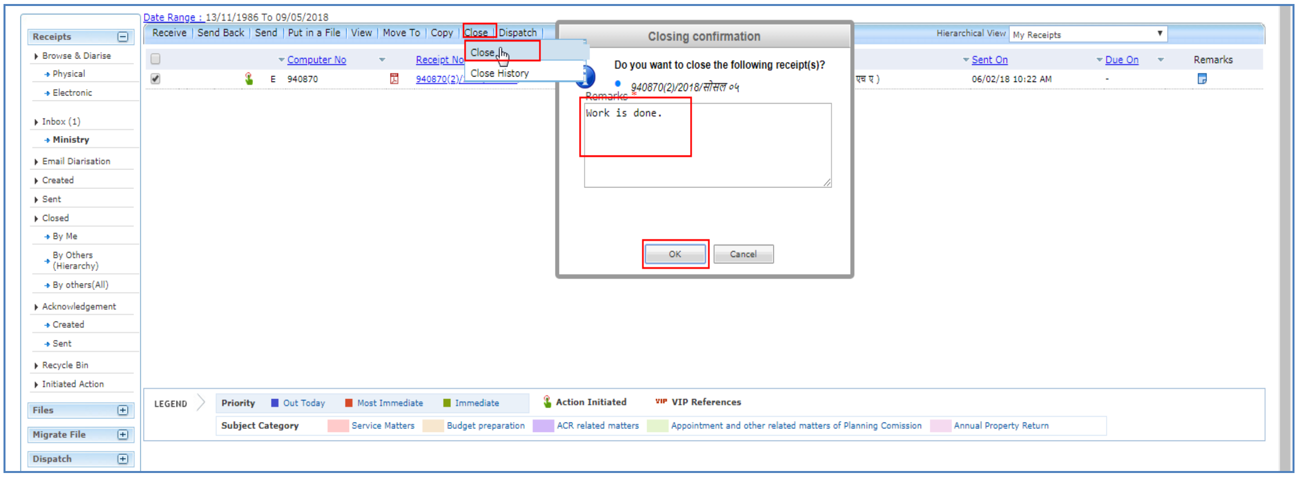


Fig.52

- Click OK button to close the selected receipt(s).

- The closed receipts will be available under **Closed→By Me** sub-module under receipt module.

Note:

The receipt in which draft is created and has not yet been dispatched cannot be closed.

Close History: The history of closing and reopening is maintained under "Close History").

f) **Dispatch**: It is a process of issuing an official reply to the concerned user/department/ministry after the approval from the internal competent authority.

- By clicking the Dispatch tab, the Dispatch screen appears, as shown in **Fig.53:**

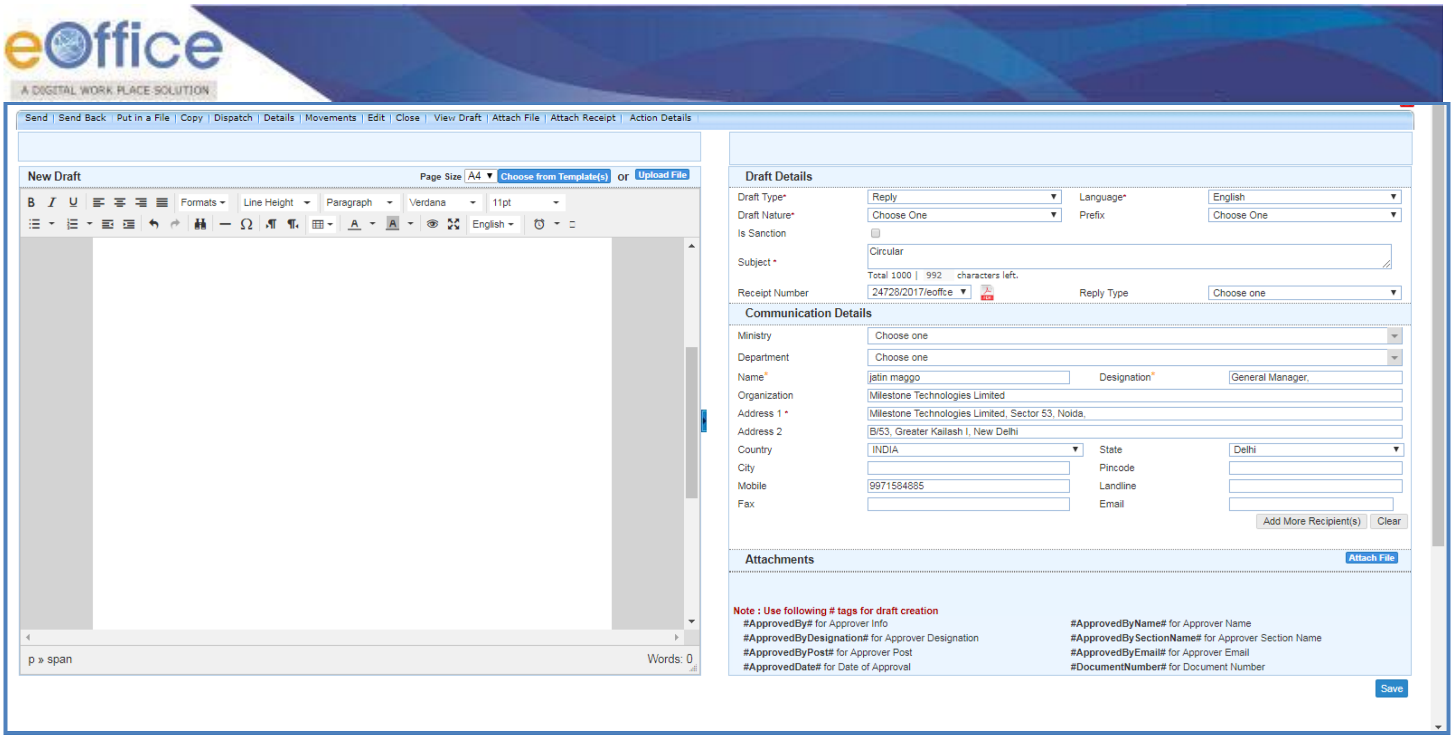


Fig.53

Note:

Refer the steps mentioned under Dispatch action tab of Receipts Browse & Diarise sub-module for further details.

Inner Page of Receipt in Inbox:

- Open the receipt (**Electronic Receipt**) by clicking the "**Receipt No.**", as shown in **Fig.54**:

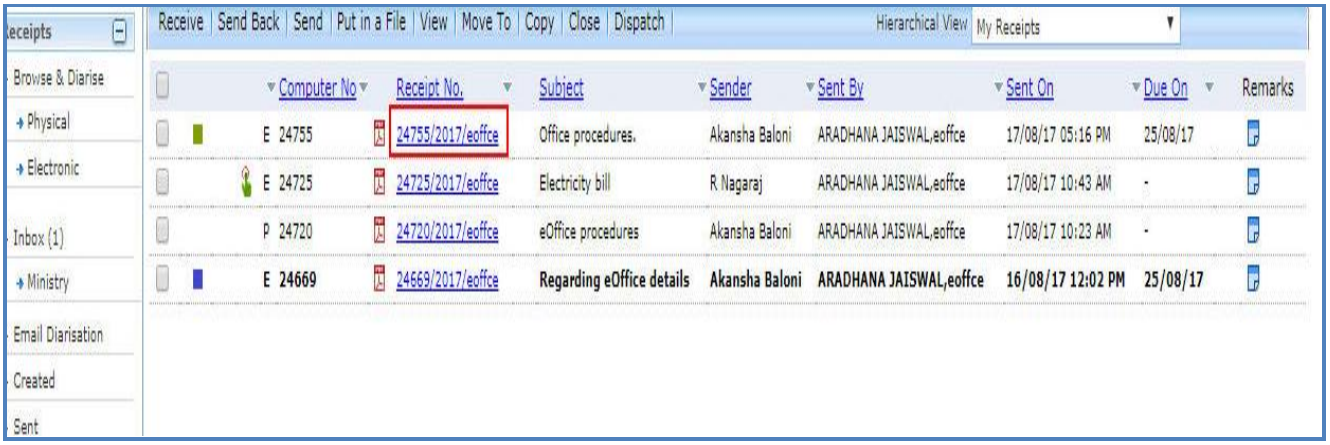


Fig.54

- Receipt gets open, as shown in **Fig.55.**
- PDF content of the receipt is displayed on the left side and the receipt details and movement details are displayed on the right side.

- Along with the details the actions that can be taken on a Electronic Receipt are present on the top in the **Menu bar** as shown in **Fig.55:**

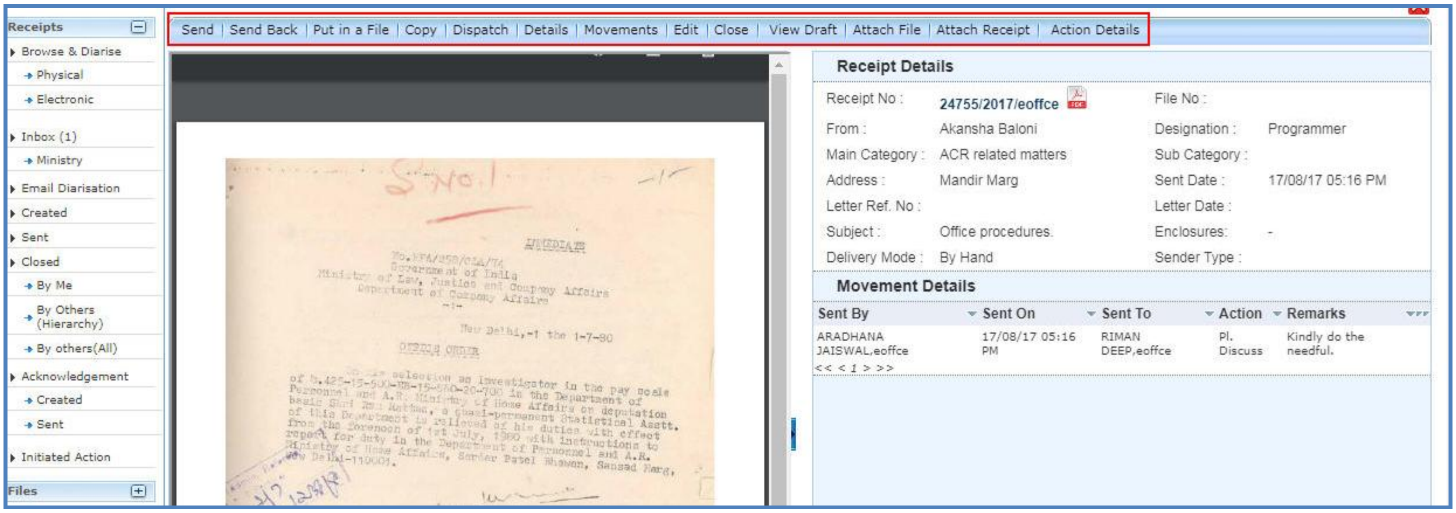


Fig.55

Electronic Receipt Action Tabs

Let us learn following different options available in the menu bar for electronic receipts.

1. **Send**: This option facilitates the user to mark the receipt to the intended recipient(s)..

Note:

Refer the steps mentioned under Send action tab of Receipt Browse and Diaries sub-module.

2. **Send back**: It is used to send the receipt back to the sender of the Receipt.

Note:

Refer the steps mentioned under Send back action tab of Receipt Inbox sub-module.

3. **Put in a File**: To **put** the **receipt** into a **concerned file**..

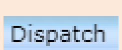
Note:

Refer the steps mentioned under Put in a File action tab of Receipts Browse & Diarise sub-module.

4. **Copy**: It can be used, in cases where multiple correspondences of similar nature are received from the same person or organization. Generates the Receipt Number and redirects the user to diary screen retaining the content (pdf) and metadata (***Copying the pdf content is configurable feature***) of the receipt.

5. **Dispatch**: It is a process of issuing an official reply to the concerned user/department/ministry after the approval from the internal competent authority.

Note:

By clicking the 

tab, the Dispatch screen appears. Refer the steps mentioned under Dispatch action tab of

Receipts Inbox sub-module.

6. **Details:** It can be used to view dispatch history, list of attached files, and list of attached receipts, detached receipts history and detached files history.

Note:

Refer Details action tab of Receipt Browse & Diarise sub-module.

7. **Movements**: This option is used to track the **Movements** of the receipt which automatically gets updated as Receipt moves from user to another, as shown in **Fig.56:**

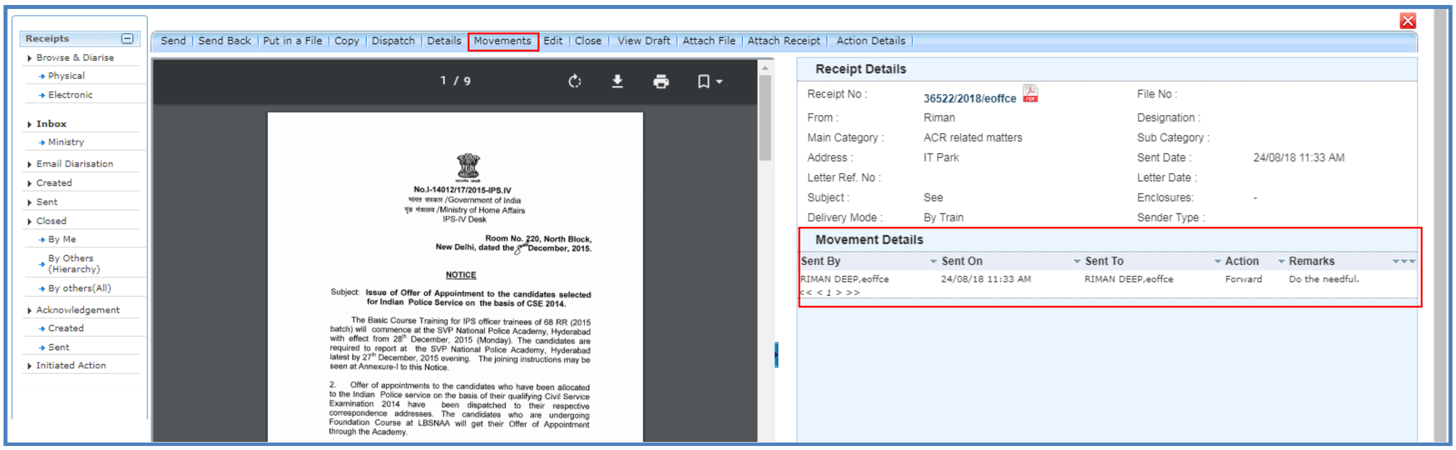


Fig.56

8. **Edit**: It can be used to edit the different metadata fields on the right of the Receipt before sending it to the intended recipient(s).

Note:

The pdf content on the left of the Receipt and the Delivery mode field on right side under Diary Details are non-editable.

Refer the steps mentioned under Edit action tab of Receipt Browse & Diarise sub-module.

9. **Close**: User can close those receipts on which either action is completed or action is not required as per departmental instructions.

Note:

Refer the steps mentioned under Close action tab of Receipt Inbox sub-module.

10. **View Draft**: It is used to view the created drafts.

To view the drafts, perform the following steps:

- Click View Draft tab, as shown in **Fig.57**:

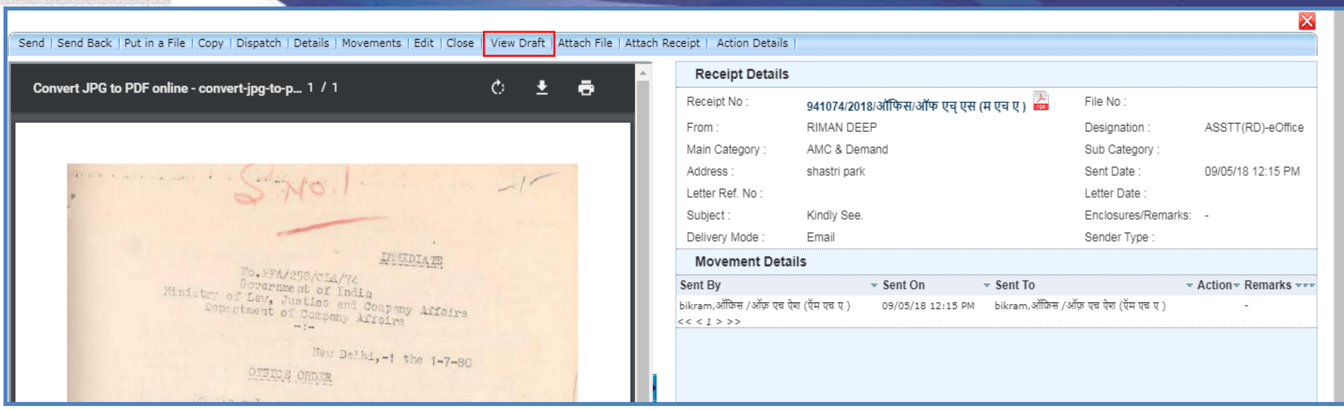


Fig.57

- Click **Draft No.** to open the draft as shown in **Fig.58**:

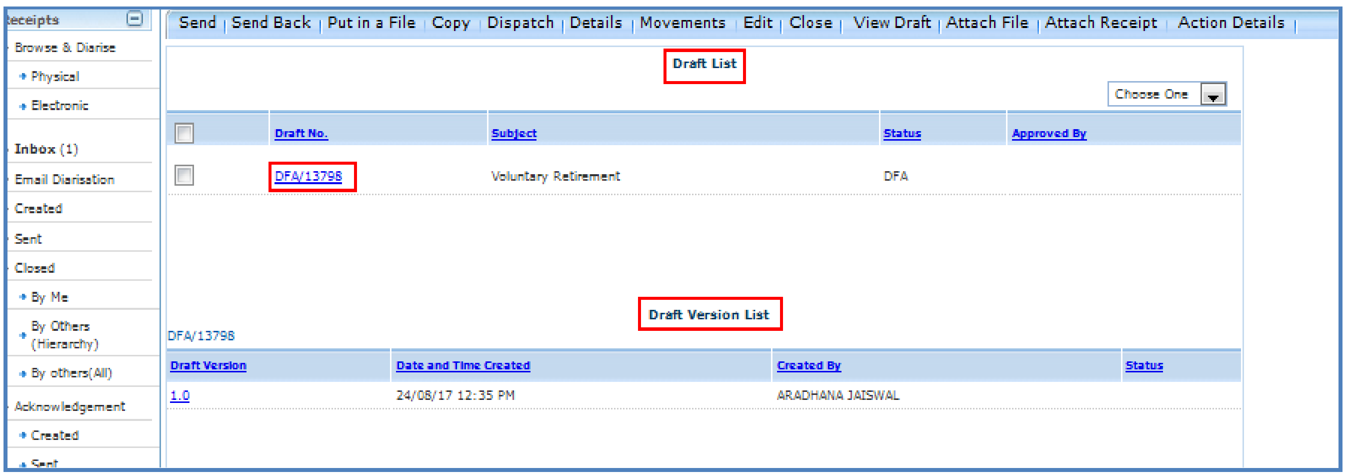


Fig.58

- The draft is shown in **Fig.59**:

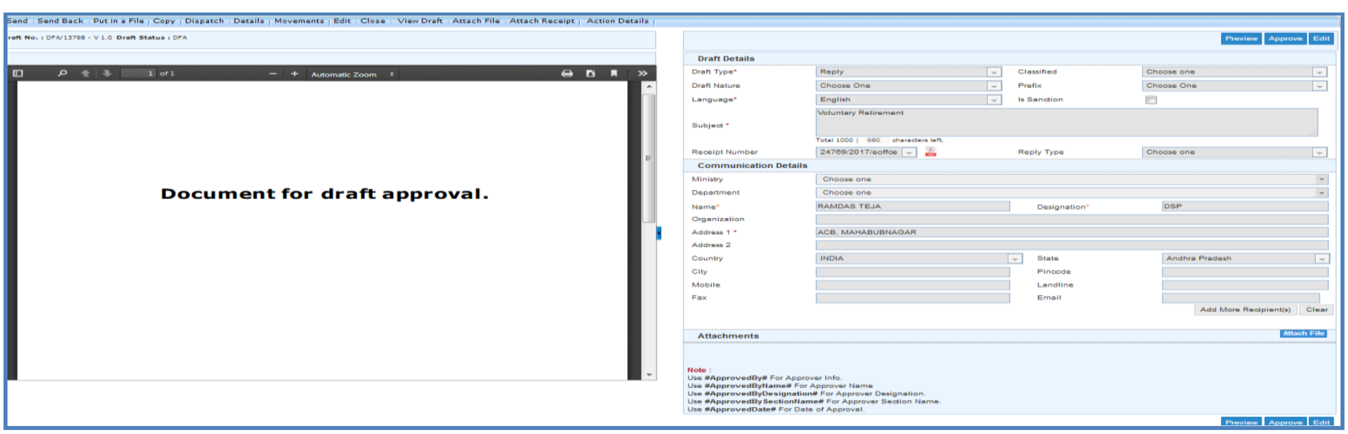


Fig.59

Note:

View Draft option is available in Electronic Receipts only, as in Physical Receipt issue is directly dispatched to the concerned authority or to the CRU section.

11. **Attach File**:

Note:

Refer the steps mentioned under Attach File action tab of Receipt Browse & Diarise sub-module.

12. **Attach Receipt**:

Note:

Refer the steps mentioned under Attach Receipt action tab of Receipt Browse & Diarise sub-module.

13. **Action Details**: To view or add remarks against the receipt for which action has been initiated.

- Click Action Details button and then click Add Comment button, as shown in **Fig.60**:

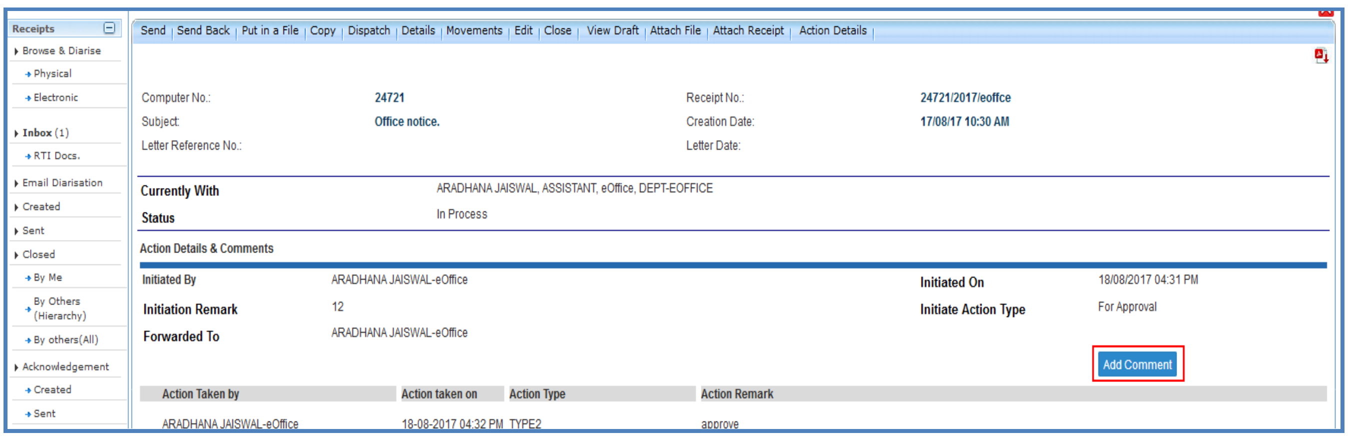


Fig.60

Note:

This feature is for Receipt(s) against which the action has initiated.

Refer to Viewing & Adding the action comment mentioned under Initiated action.

Physical Receipt Action Tabs

The actions that can be taken on a Physical Receipt are present on the top in the **Menu bar** as shown in **Fig.61:**

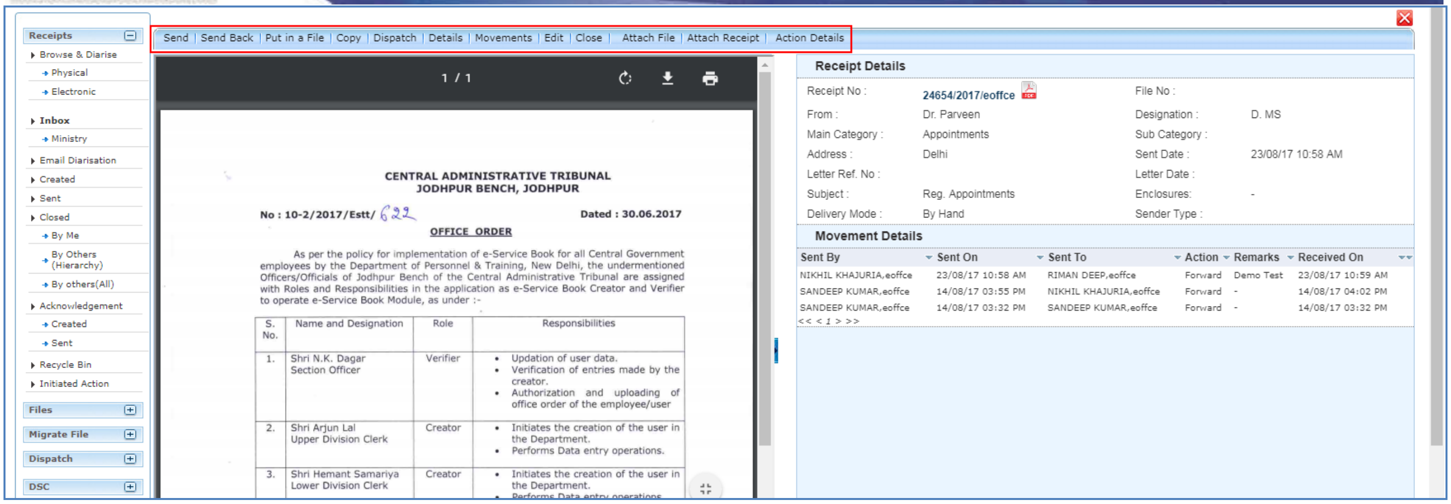


Fig.61

Note:

Refer the action tabs mentioned under Electronic Receipt Action Tabs except the View Draft action tab as there is no provision to create DFA for Physical Receipt.

Email Diarization

- Go to **portal page** and then click **NIC mail** link as shown in **Fig.62**:

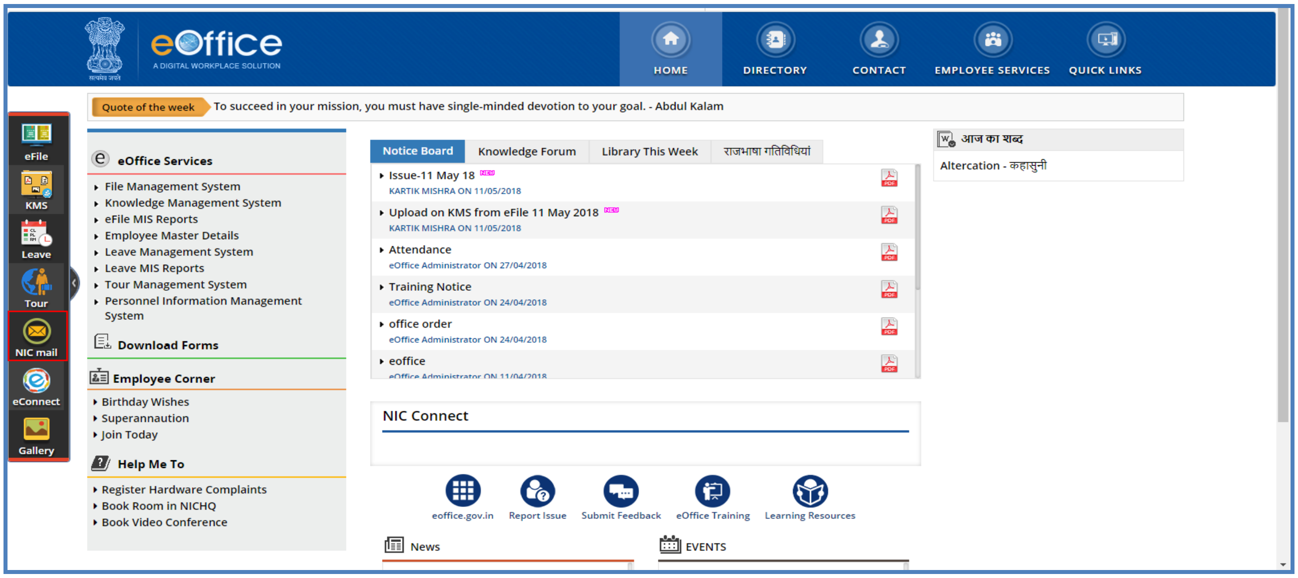


Fig.62

- The login page appears. enter the credentials and click Sign In button as shown in **Fig.63**:

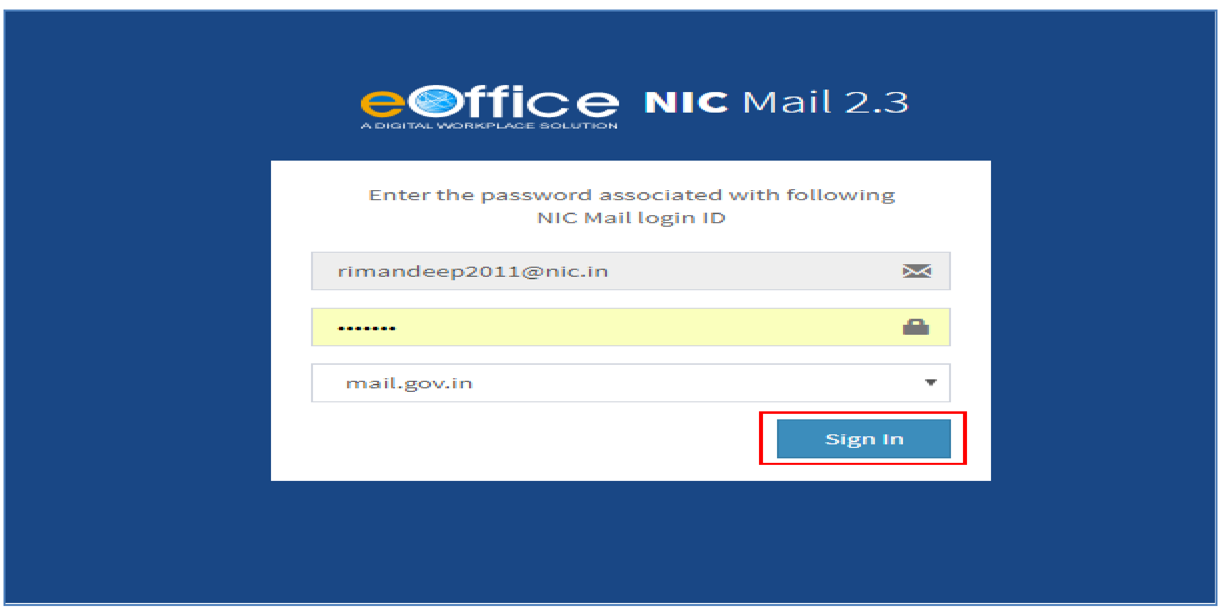


Fig.63

Note:

To use this feature the NIC Mail/ Official eMail id of user should be configured with eoffice.

- Inbox screen appears, open the mail required for the diarisation and click Move To eFile button as shown in **Fig.64**:

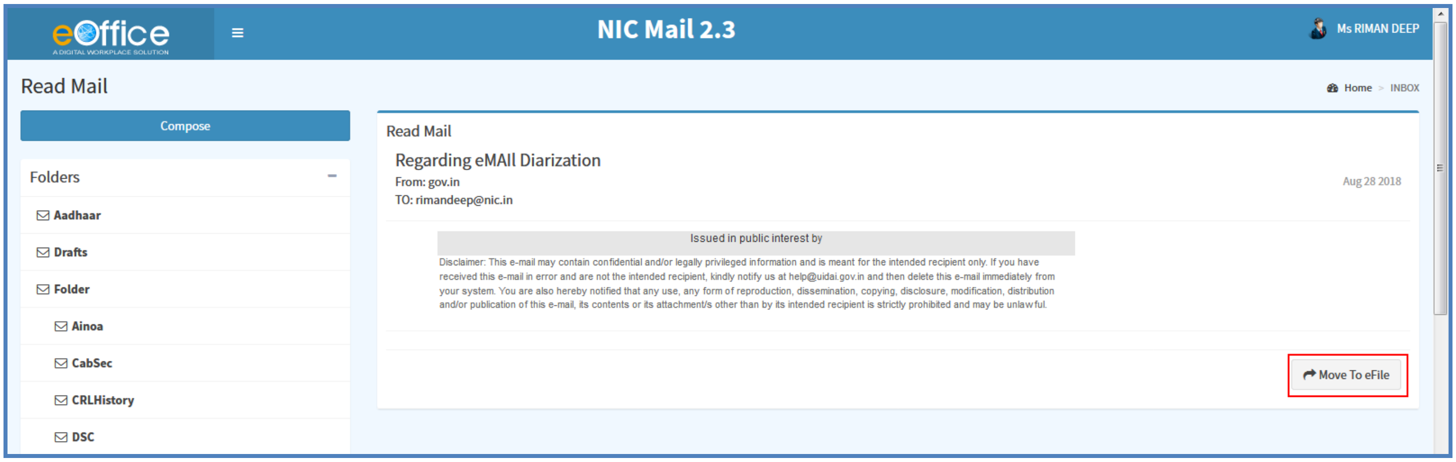


Fig.64

Note:

Only one mail can be moved to eFile at a time.

- A confirmation popup window appears as shown in **Fig.65**:

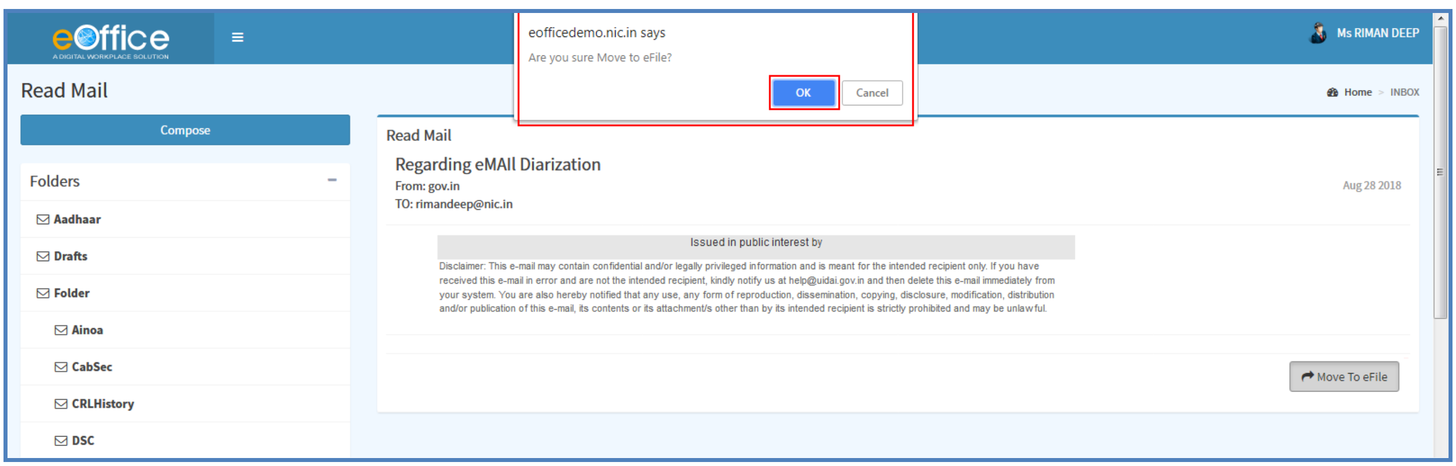


Fig.65

- Clicks **OK** OK button, a message is displayed "**Successfully Moved To eFile**" as shown in **Fig.66**:

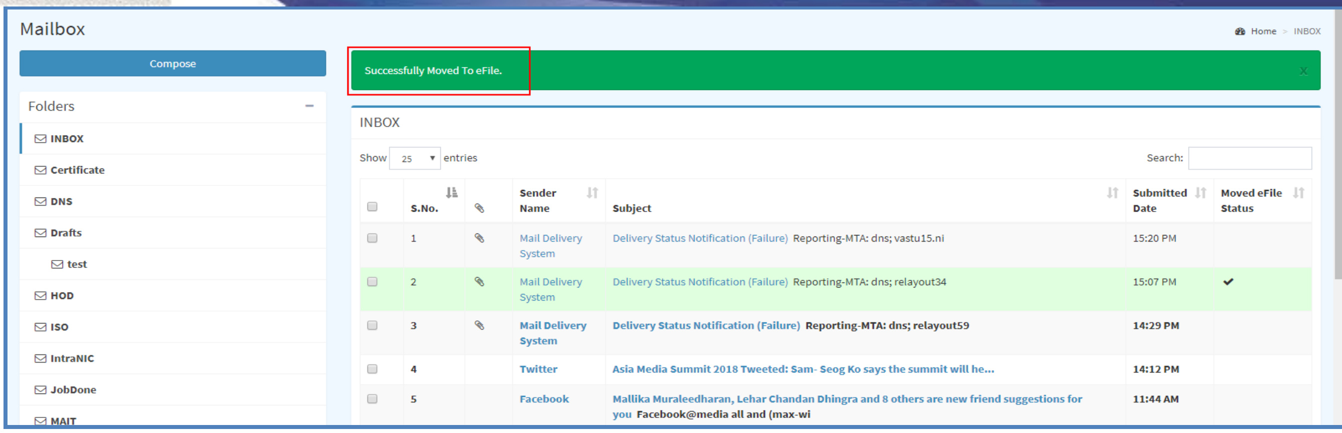


Fig.66

- Now go to **File Management System (click User name→Home button→File Management System Link)** and click **Email Diarisation** link under Receipt module, as shown in **Fig.67**:

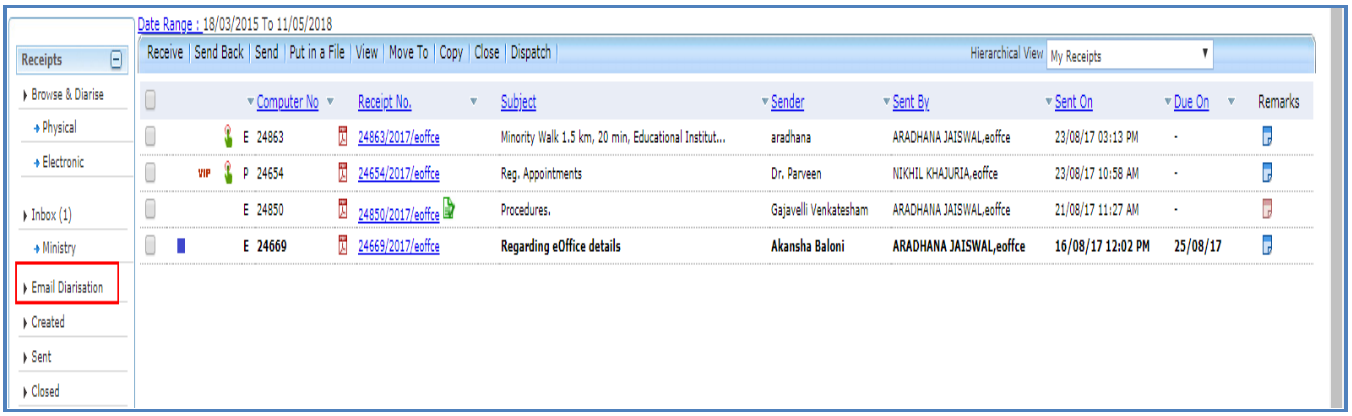


Fig.67

- Click **Subject** link of the mail, as shown in **Fig.68:**

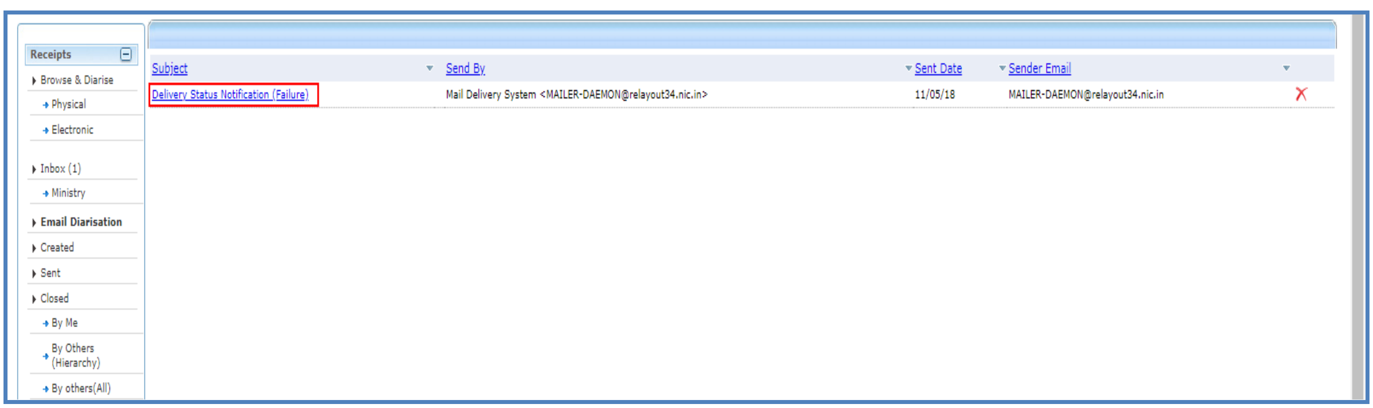


Fig.68

- The mapping page appears, select the mail body and attachment from the **Mail Body & Attachments** window and move it towards **Select Attachments to Merge** window and click Diary button as shown in **Fig.69**:

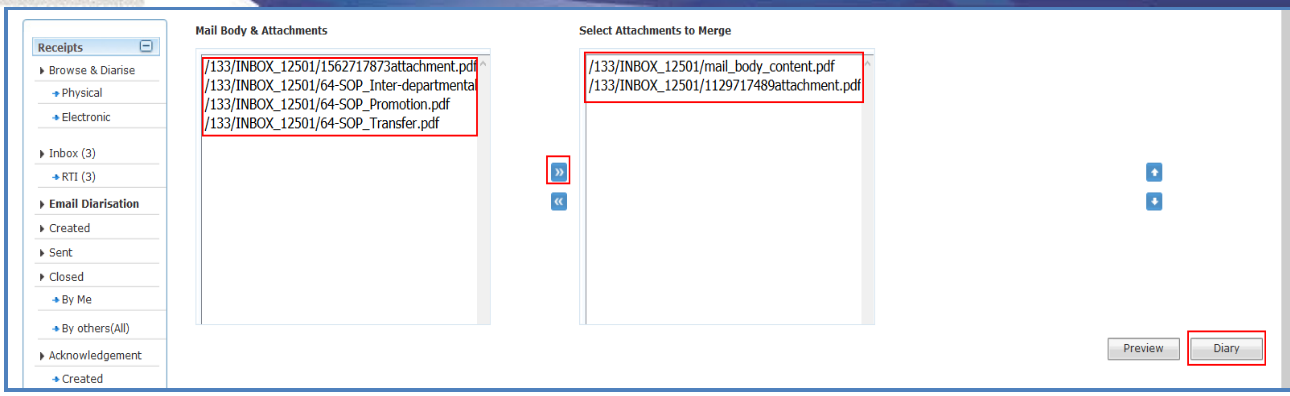


Fig.69

- The diary screen will appear with pre-filled scanned document and subject, as shown in **Fig.70:**

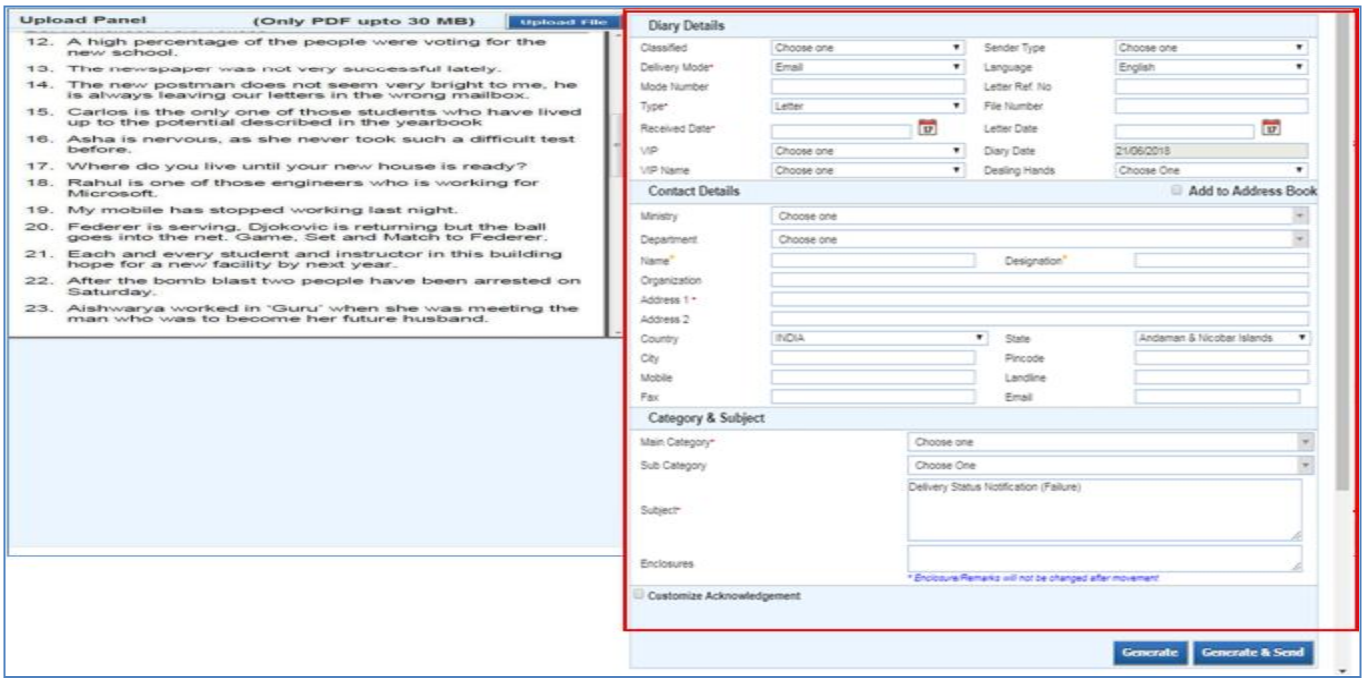


Fig.70

- Diarise the moved NIC mail and click the **Generate** button or **Generate & Send** **(Fig. 70)**.
- The receipt gets generated.

Created

It contains list of receipts that has been diarised but not yet marked/sent.

There are six action tabs provided under Created Section of receipt, as shown in **Fig.71**:

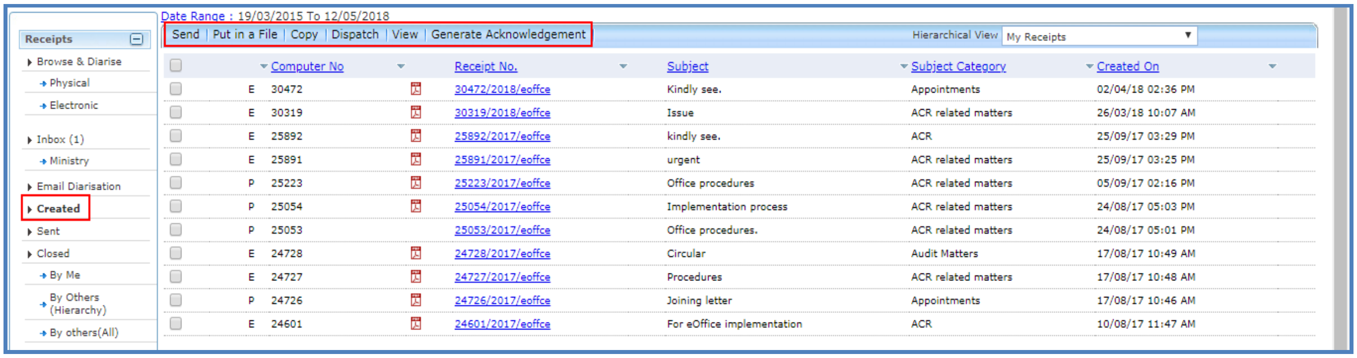


Fig.71

1. **Send**: This option facilitates the user to mark the receipt to the intended recipient(s).

Note:

Refer the steps mentioned under Send action tab of Receipt Browse and Diaries sub-module.

2. **Put in a File**: To **put** the **generated receipt** into a **concerned file**.

Note:

Refer the steps mentioned under Put in a File action tab of Receipts Browse & Diarise sub-module.

3. **Copy**: It can be used, in cases where DAK/ letter are diarized for same subject nature. Generates the Receipt Number and redirects the user to diary screen retaining the content (pdf) and metadata (***Copying the pdf content is configurable feature***) of the receipt.

4. **Dispatch**: It is a process of issuing an official reply to the concerned user/department/ministry after the approval from the internal competent authority.

Note:

Refer the steps mentioned under Dispatch action tab of Receipts Browse & Diarise sub-module.

5. **View**: It is used to sort the receipts based on different criteria such as Physical, Electronic, etc.

- Move the cursor on  tab, a drop down menu will appear with the options as shown in **Fig.72**:

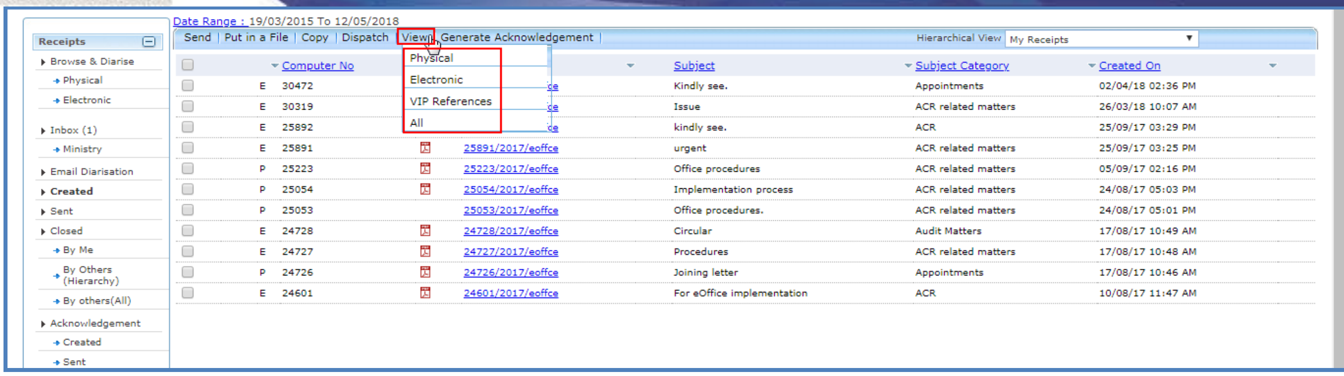


Fig.72

a) **Physical**: To view all physical receipts.

b) **Electronic**: To view all electronic receipts.

c) **VIP References**: To view all the VIP referenced receipts.

d) **ALL**: To view all the created receipts from the latest to the oldest order (Default View).

6. **Generate Acknowledgment**: This is the provision to acknowledge the sender who has sent the letter that has been received in the organization.

Note:

For steps to Generate Acknowledgement refer Acknowledgement sub-module.

Sent

All the receipt(s) once marked to the intended recipient(s) placed under sent sub-module.

Note:

Pull back ( ): It is used to draw back a sent receipt, which has not been received/ read by the recipient in his/ her Inbox (**Fig.70**).

There are 4 action tabs provided under Sent section of Receipt, as shown in **Fig.73**:

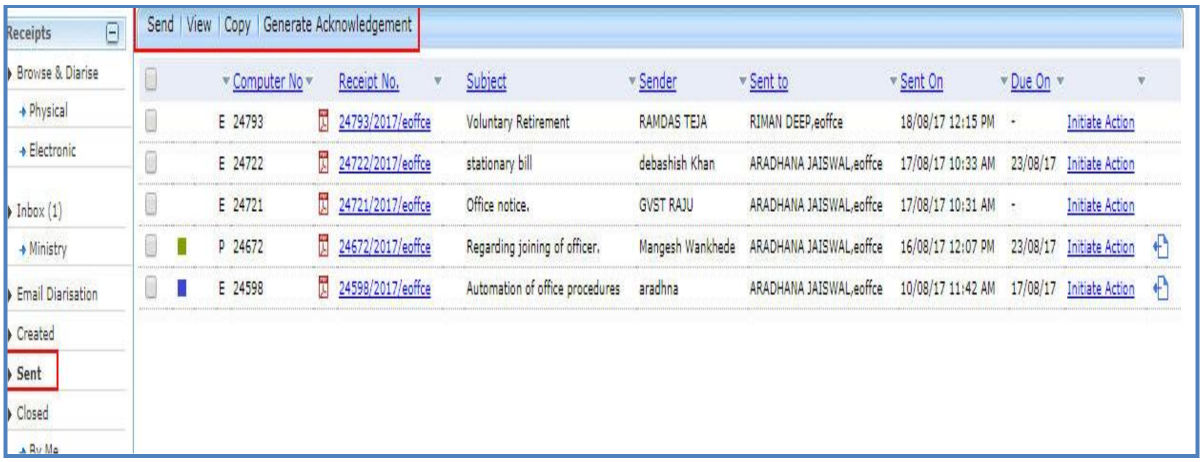


Fig.73

1. **Send**: This option facilitates the user to mark the copy of receipt to the intended recipient(s).

Note:

Refer the steps mentioned under Send action tab of Receipt Browse and Diaries sub-module.

2. **View**: It is used to sort the receipts based on different criteria such as Physical, Electronic, etc.

Note:

Refer to View action tab of Receipt Created sub-module.

3. **Copy**: It can be used, in cases where multiple correspondences of similar nature are received from the same person or organization. Generates the Receipt Number and redirects the user to diary screen retaining the content (pdf) and metadata (***Copying the pdf content is configurable feature***) of the receipt.

4. **Generate Acknowledgement**: There is a provision to acknowledge the user who has sent the letter that has been received in the organization.

Note:

For steps to Generate Acknowledgement refer Acknowledgement sub-module.

Closed

It contains the Receipts which are closed as no action is required on them.

Closed module contains 3 links:

a) **By Me**- Lists all the receipts closed by the logged in user.

b) **By Others (Hierarchy)**-Lists all the receipts that are closed by the users of section(s) (which are under the hierarchy of logged in user section).

c) **By Others (All)** - Lists all receipts that are closed by anyone in the department, irrespective of hierarchy.

Note:

By Others (Hierarchy) and By Others (All) links are role based .It will be visible to the users whom having the role for Hierarchy and All respectively.

A receipt listed in **Closed (By me)** list can be re-opened by clicking the Re-open tab.

To Re-open a receipt, perform the following steps:

- Select the receipt(s) and click Re-open button as shown in **Fig.74**:

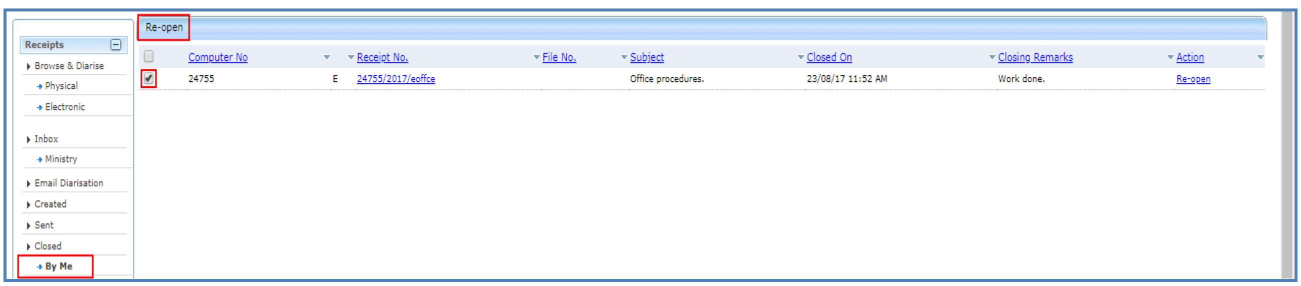


Fig.74

- Reopening confirmation popup window appears. Enter the reopening remarks and click OK button, as shown in **Fig.75:**

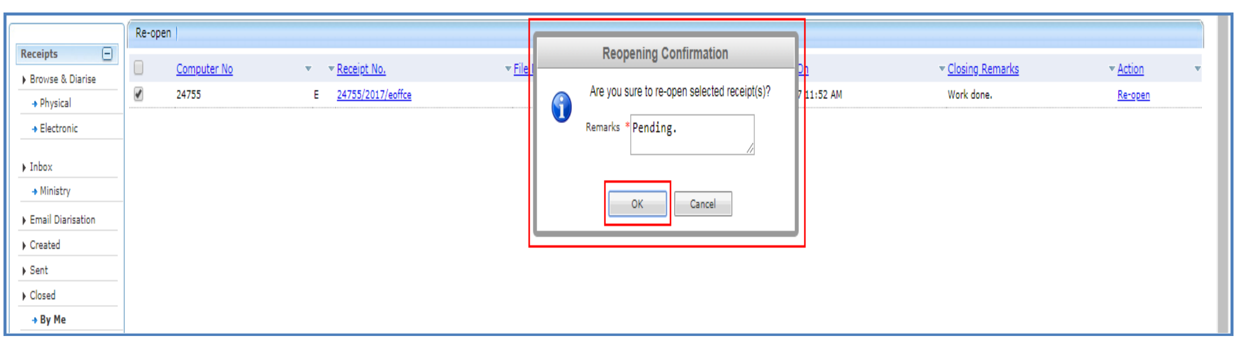


Fig.75

- The **reopened** receipt will be available under Receipt **Inbox** sub-module.

Acknowledgement

It is used to acknowledge the sender who has sent the letter that has been received in the organization.

It can be sent both **electronically** (**email & SMS**) and **physically** (**through post**).

Acknowledgement can be created from:

a) **From Browse & Diarise page:**

- While diarising a receipt, in the metadata section select the **Customize Acknowledgement** check box and click **Generate** button as shown in **Fig.76:**

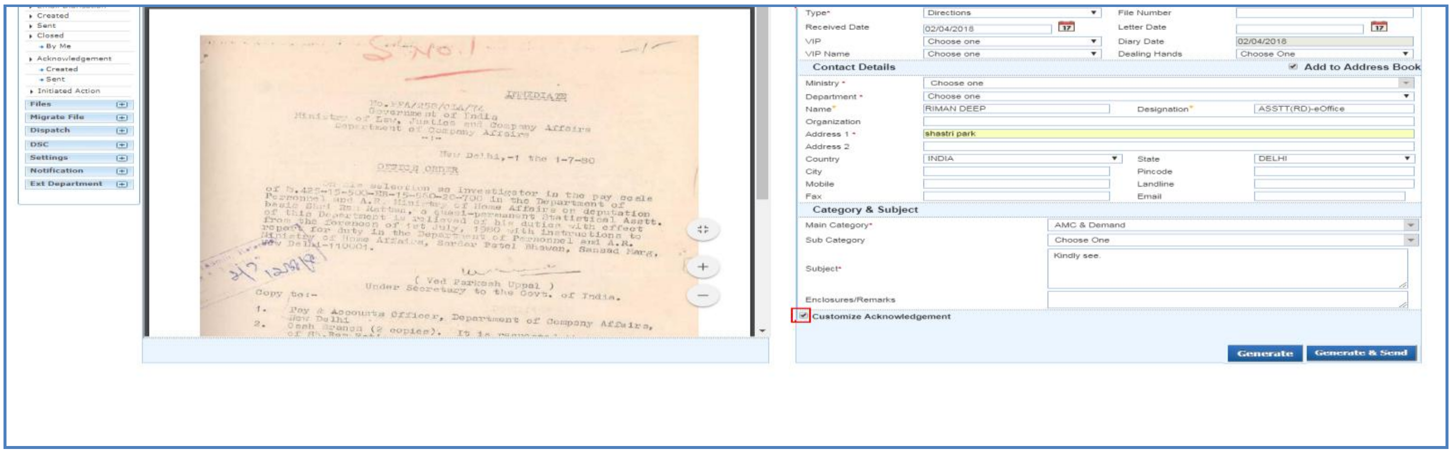


Fig.76

- The acknowledgement creation page appears, along with customized acknowledgment.
- User can choose a pre-defined template by clicking **Choose from Template(s)** button or can edit the acknowledgment content or copy the content from already created word/ text files and paste it.
- To send the acknowledgement immediately, click **Continue** button as shown in **Fig.77:**

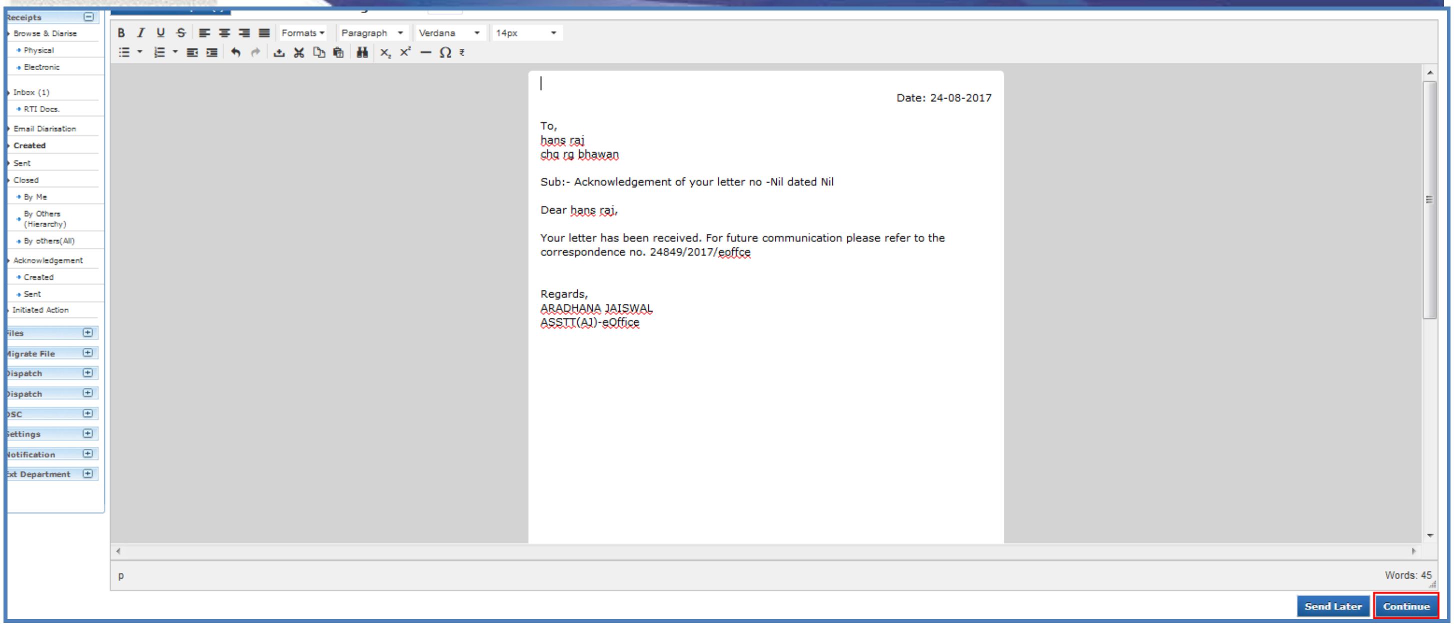


Fig.77

- **Send Later**: To send the acknowledgement at a later stage. The draft acknowledgements will be listed in "**Created**" link of Acknowledgement sub-module.
- Acknowledgement Content page appears. Select the acknowledgement sending medium and fill **Dispatch Details**. Click **Send** button as shown in **Fig.78:**

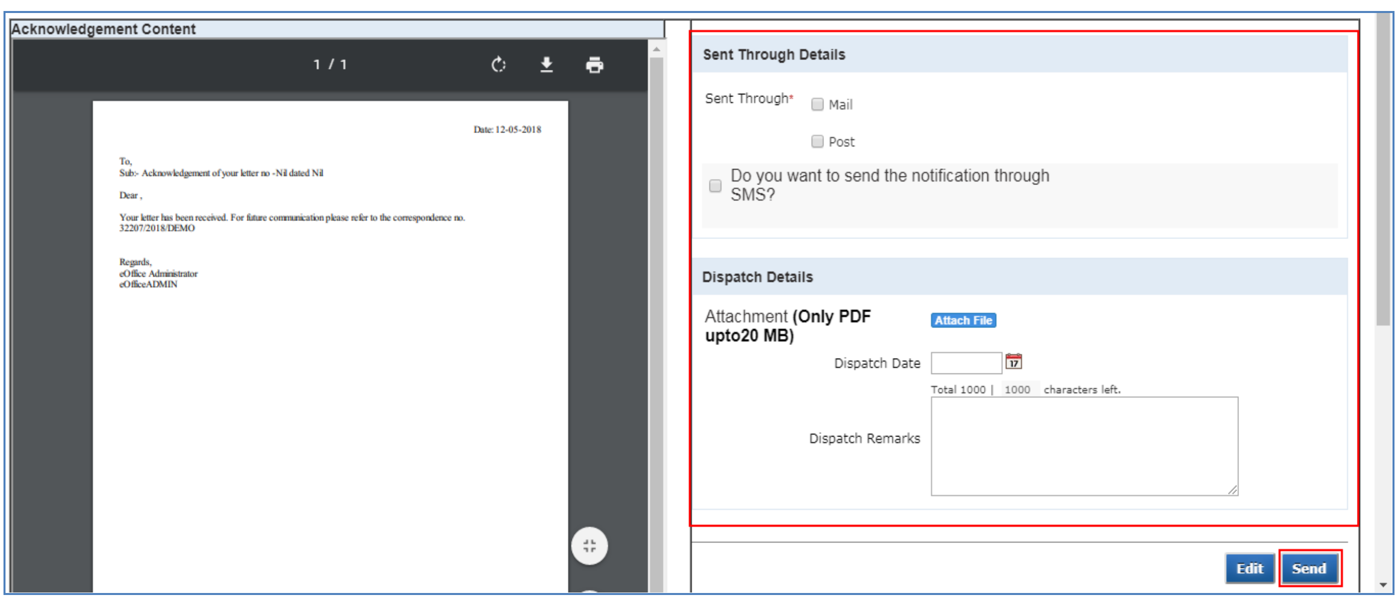


Fig.78

- **Edit** button to edit the content of acknowledgement.

- Once the acknowledgement is sent, it will be listed in the “Sent” link under Acknowledgement sub-module.

OR

- By clicking **Generate & Send** button, the send screen appears.

- Mark the recipient(s) in To and CC fields and other required details and click **Send** button, as shown in **Fig.79:**

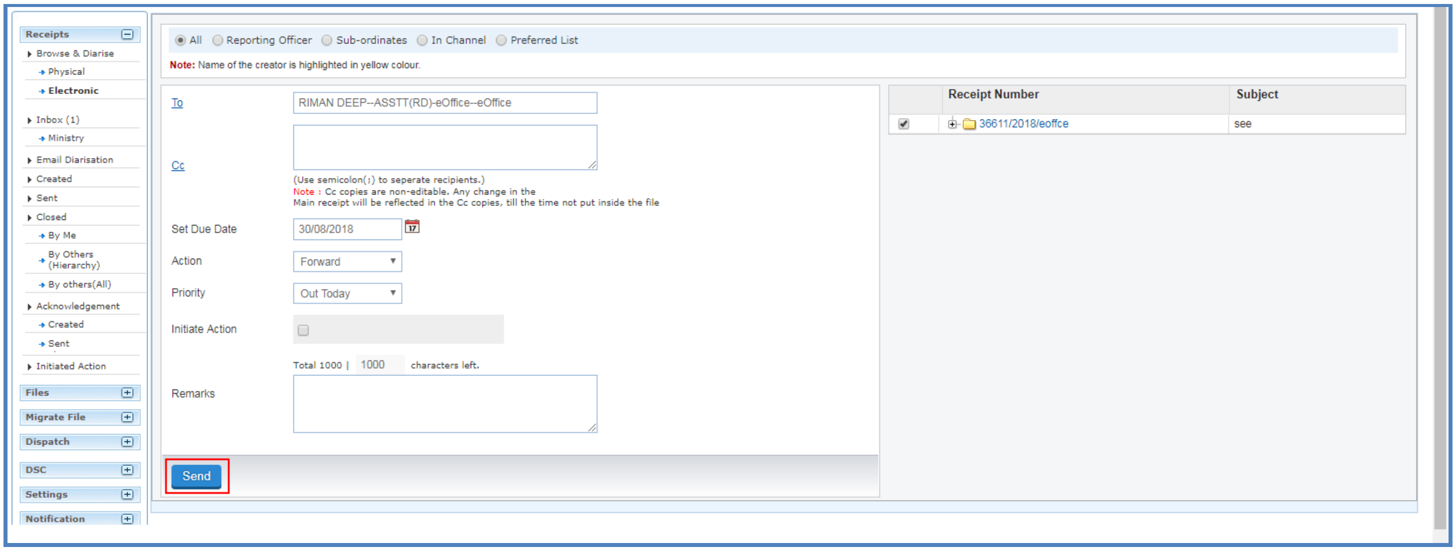


Fig.79

- The acknowledgement creation page appears, along with customized acknowledgment and message “receipt has been successfully sent. You can now generate the acknowledgement”, as shown in **Fig.80:**

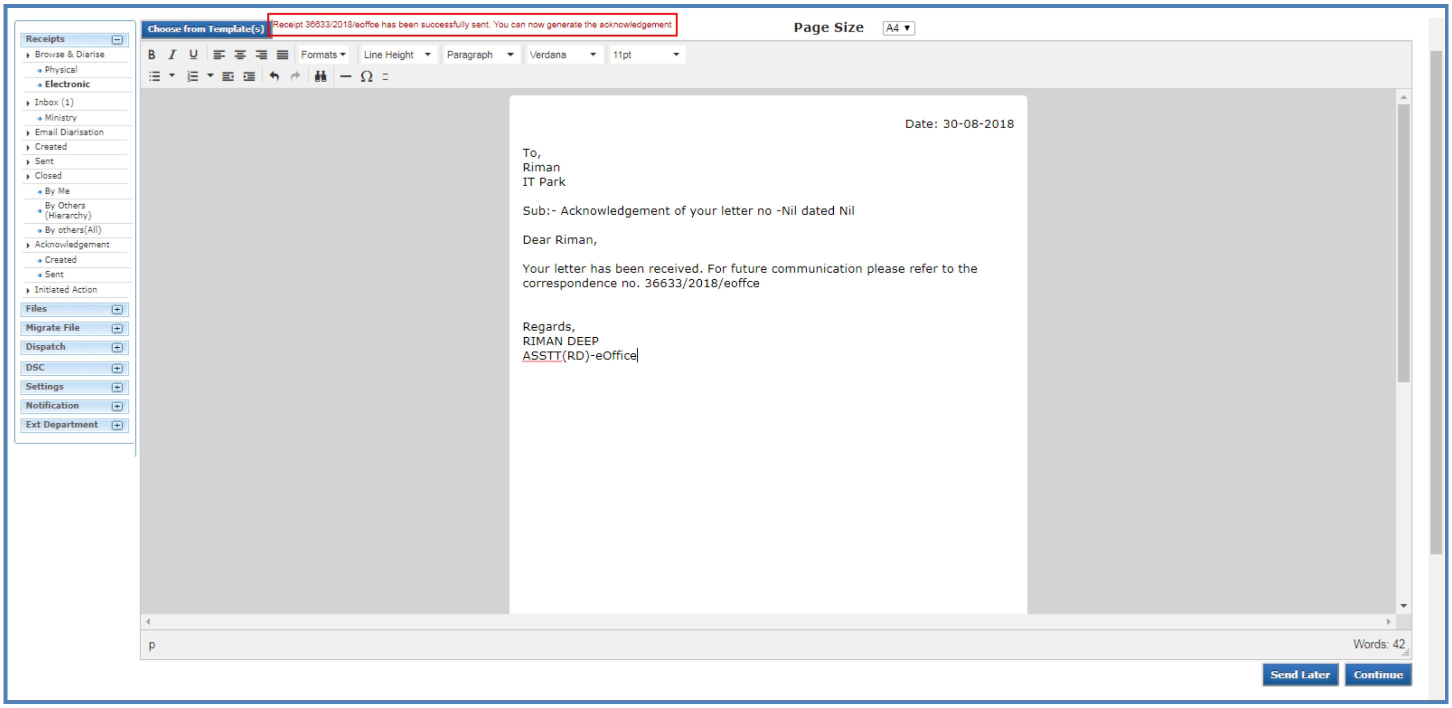


Fig.80

Note:

Further steps will be same as mentioned under Acknowledgment sub-module (**From Browse & Diarise page**).

b) **From Created Receipts**:

- Select a **receipt** from the list in **Created** sub-module and click Generate Acknowledgement button as shown in **Fig.81**:

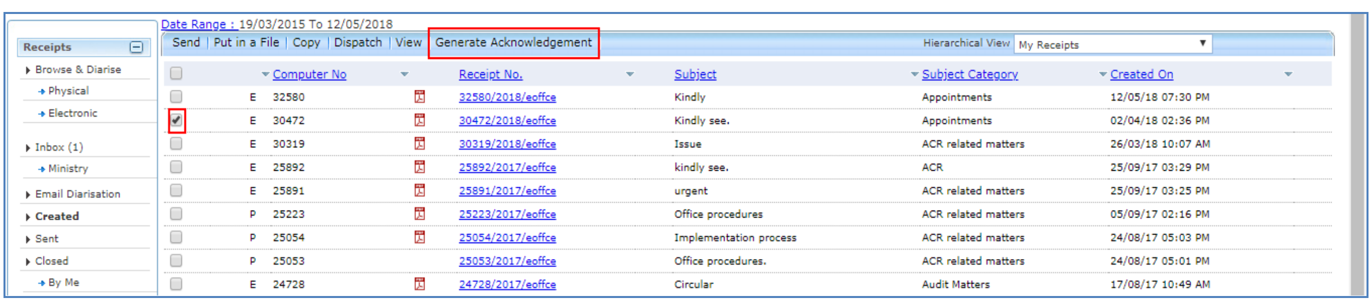


Fig.81

- The acknowledgement creation page appears along with customized acknowledgment.

Note:

For the remaining steps, refer the steps mentioned in Acknowledgement sub-module (From Browse & Diarise page)

c) **From Sent Receipts**:

- Select a receipt from the list in Sent sub-module and click Generate Acknowledgement button, as shown in **Fig.82:**

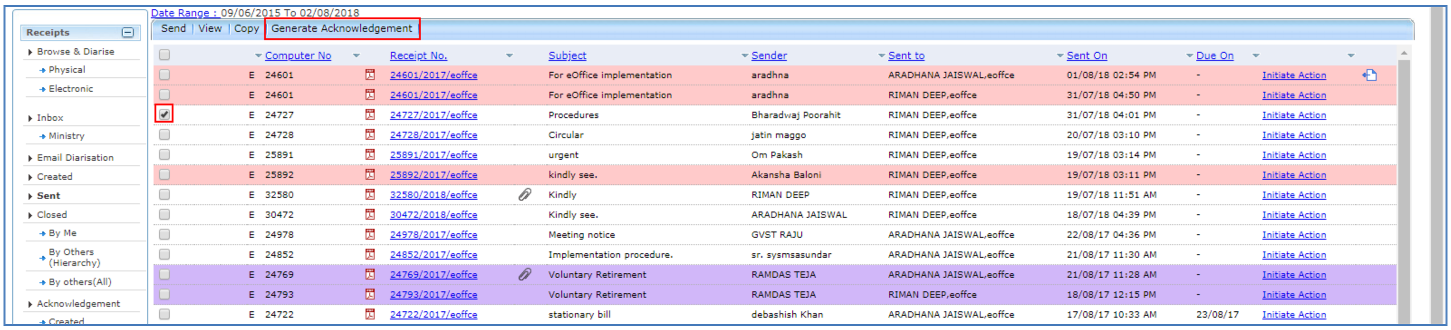


Fig.82

- The acknowledgement creation page appears along with customized acknowledgment.

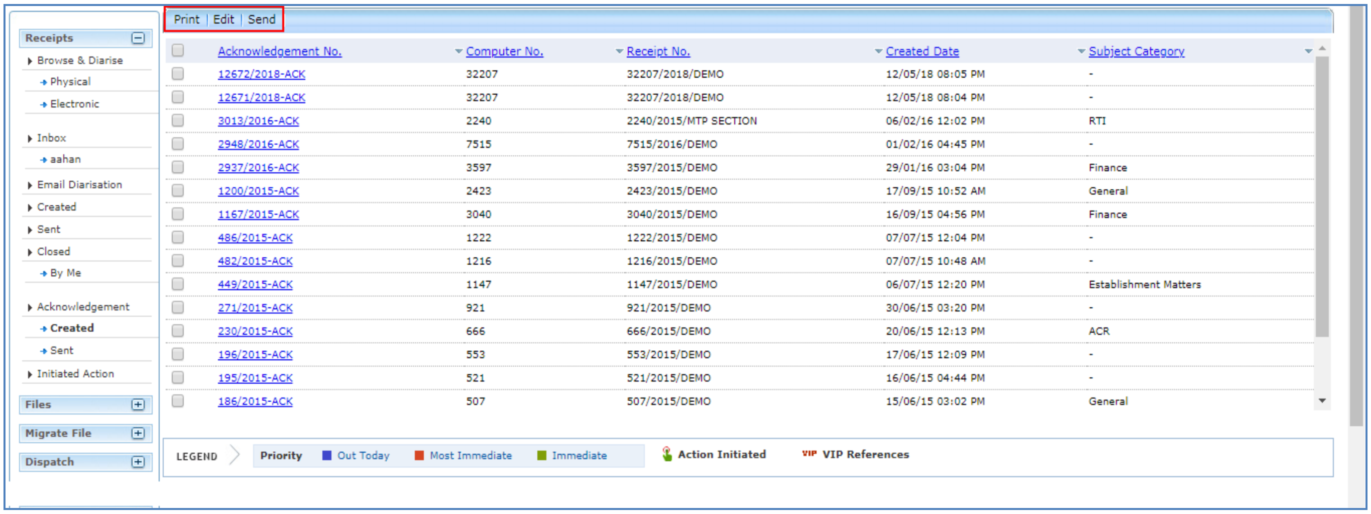
Note:

For the remaining steps, refer the steps mentioned in Acknowledgement sub-module (From Browse & Diarise page).

Acknowledgment→Created Link

It contains list of acknowledgments that have been created but not yet marked/sent.

There are 3 action tabs provided under Created link of Receipt Acknowledgment sub-module, as shown in **Fig.83:**



Acknowledgement No.	Computer No.	Receipt No.	Created Date	Subject Category
12672/2018-ACK	32207	32207/2018/DEMO	12/05/18 08:05 PM	-
12671/2018-ACK	32207	32207/2018/DEMO	12/05/18 08:04 PM	-
3013/2016-ACK	2240	2240/2015/MTP SECTION	06/02/16 12:02 PM	RTI
2948/2016-ACK	7515	7515/2016/DEMO	01/02/16 04:45 PM	-
2937/2016-ACK	3597	3597/2015/DEMO	29/01/16 03:04 PM	Finance
1200/2015-ACK	2423	2423/2015/DEMO	17/09/15 10:52 AM	General
1167/2015-ACK	3040	3040/2015/DEMO	16/09/15 04:56 PM	Finance
486/2015-ACK	1222	1222/2015/DEMO	07/07/15 12:04 PM	-
482/2015-ACK	1216	1216/2015/DEMO	07/07/15 10:48 AM	-
449/2015-ACK	1147	1147/2015/DEMO	06/07/15 12:20 PM	Establishment Matters
271/2015-ACK	921	921/2015/DEMO	30/06/15 03:20 PM	-
230/2015-ACK	666	666/2015/DEMO	20/06/15 12:13 PM	ACR
196/2015-ACK	553	553/2015/DEMO	17/06/15 12:09 PM	-
195/2015-ACK	521	521/2015/DEMO	16/06/15 04:44 PM	-
186/2015-ACK	507	507/2015/DEMO	15/06/15 03:02 PM	General

Fig.83

1. Print : To download the created acknowledgment.
2. Edit : To make the necessary changes in Acknowledgment.
3. Send : To send the acknowledgment to the sender of the receipt.

Acknowledgement→Sent Link

It contains those acknowledgements which are already sent to users.

a) View Signed Copy link: To view the attached copy of signed physical acknowledgment approved by the competent authority.

There are 2 action tabs provided under Sent link of Receipt Acknowledgment sub-module, as shown in **Fig.84:**

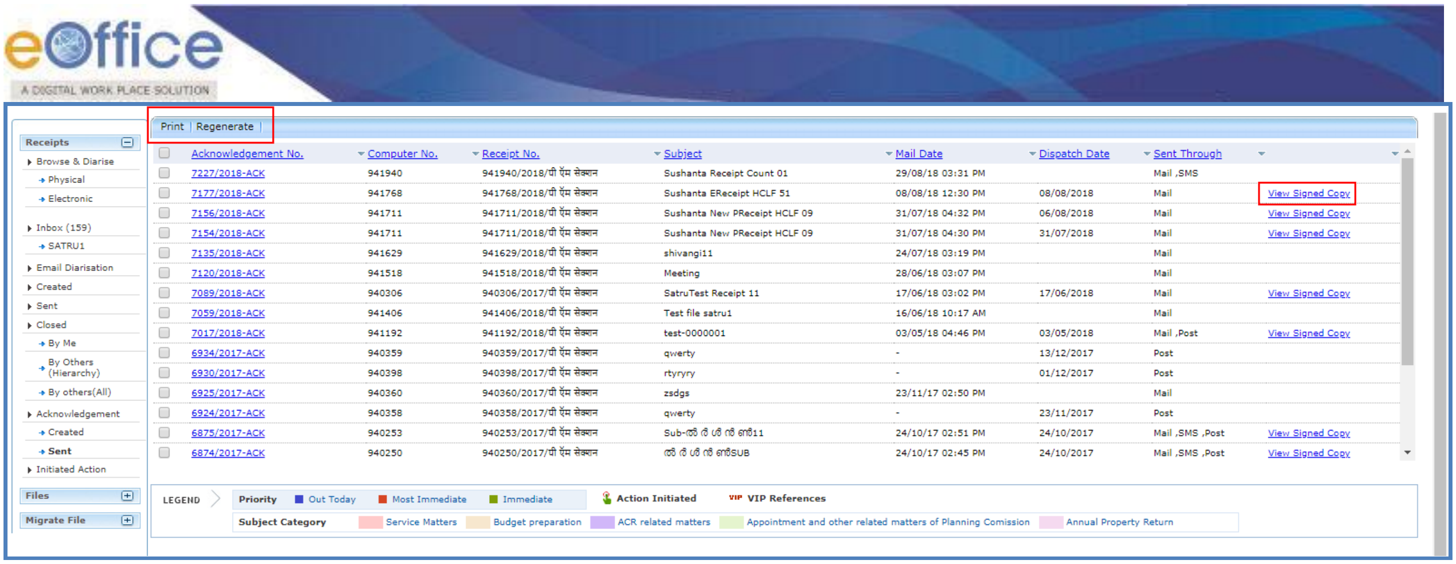


Fig.84

1. Print : To download the sent acknowledgment.
2. Regenerate **:** To create another copy of sent acknowledgment.

Initiated Action

It is used to initiate the process for recording and tracking of actions taken on a receipt.

Note:

This feature is configurable and role based. The provided role is ROLE_ACTION_INITIATOR.

The receipts can be marked for Actions from:

a) **Send Screen (Sending of the Receipt)**:

The user would be able to initiate the action by using the following fields:

- Check the **Initiate Action** check-Box, select the initiation Type from drop down menu and provide the mandatory Remarks, as shown in **Fig.85**:

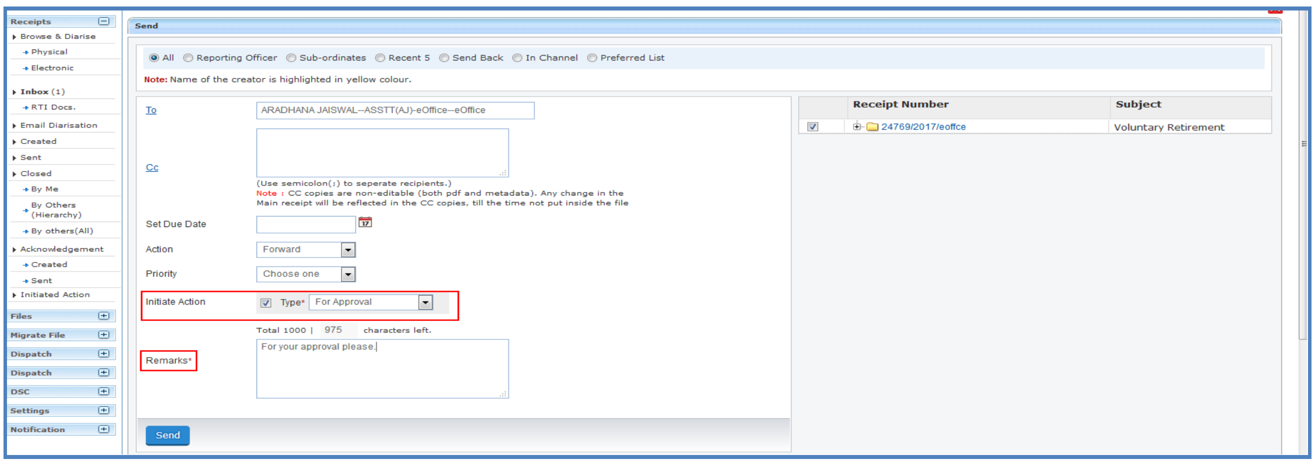


Fig.85

b) **From Sent Sub-module page**:

- At the receipt sent page, the link of "**Initiate Action**" is available against every receipt, as shown in **Fig.86**:

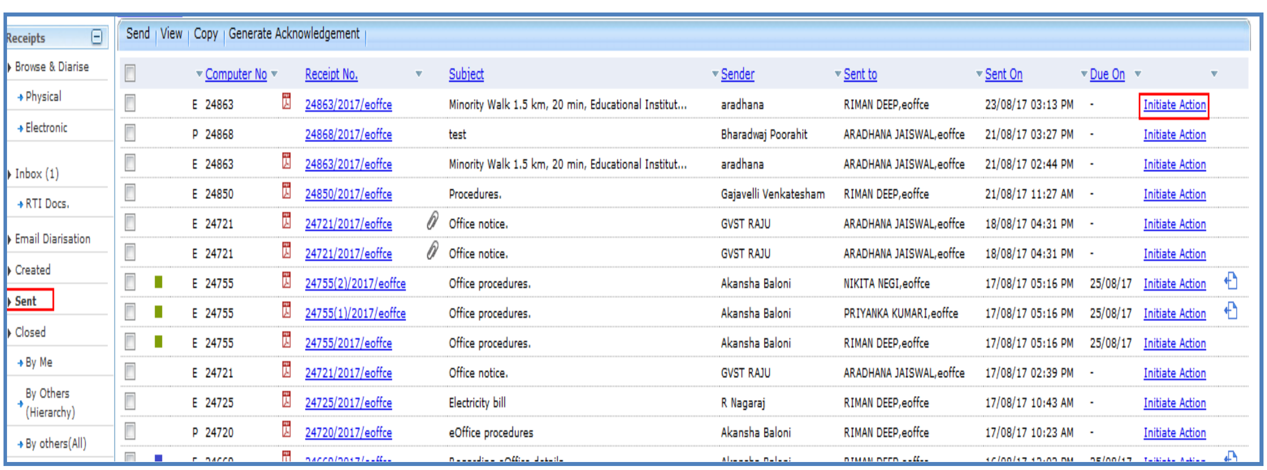


Fig.86

- Click Initiate Action link. A receipt initiation confirmation pop-up window appears.
- Enter the initiation **Type** and **Remarks** and click OK button, as shown in **Fig.87**:

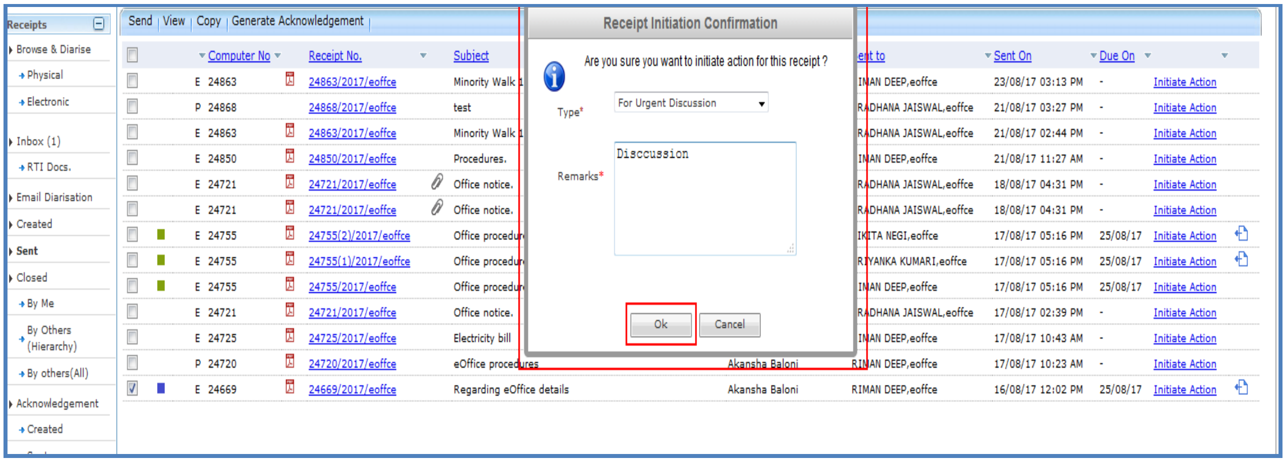


Fig.87

Receipts, on which action is initiated, will be differentiated by legend ( ).

Actions on any receipt cannot be initiated, if already an action is in process & not closed.

Viewing & Adding the Action comment:

The below process would be used for viewing and **adding** the **Action-Remarks**

a) **From the Receipt's Inbox Inner page**:

- To view/ Add action Viewing action records, click Action Details tab from Receipt inner page.
- Click Add Comment button (available along with the active action) in the "**Action Details**" screen,.
- Provide the Action Type, Remarks and click the Add button, as shown in **Fig.88**:

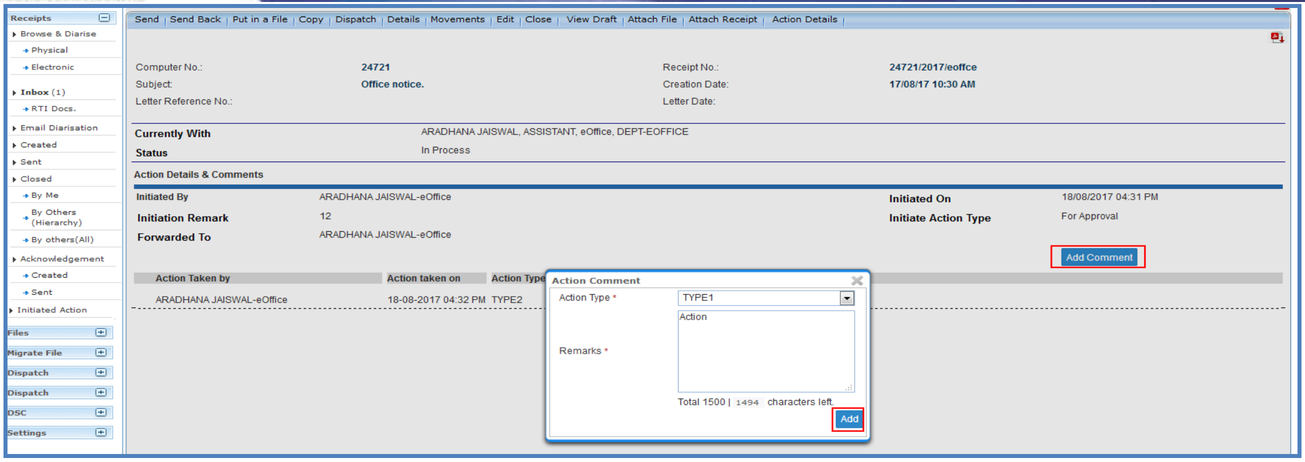


Fig.88

b) **From the Receipt inner screen of Sent sub-module**:

- Action Details Page will be in read only mode and there is no provision to Record Action from this page as shown in **Fig.89**:

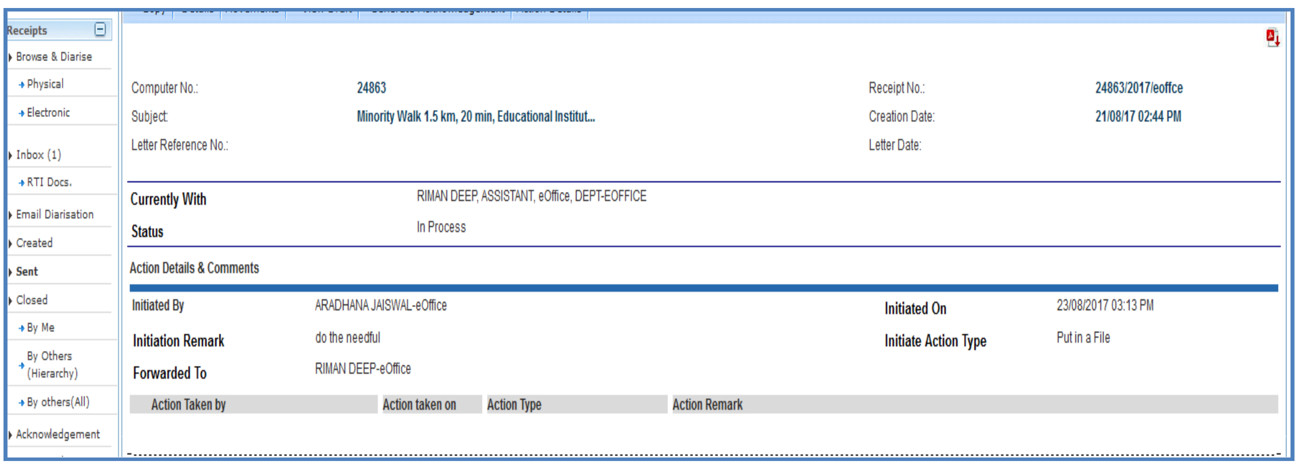


Fig.89

c) **Details tab (Receipt Inner page)**:

To view/ add the action record on attached Receipt from details section.

- Click the **Action Details** link adjacent to the attached receipt to view the Action Details of the attached receipt as shown in **Fig.90**:

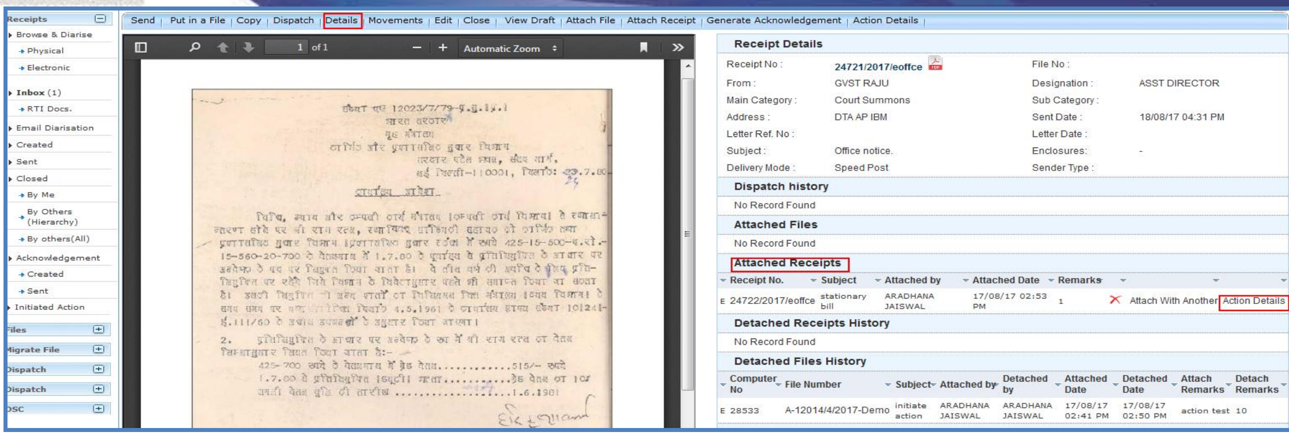


Fig.90

- To add remarks click **Add Comment** button, as shown in **Fig.91**:

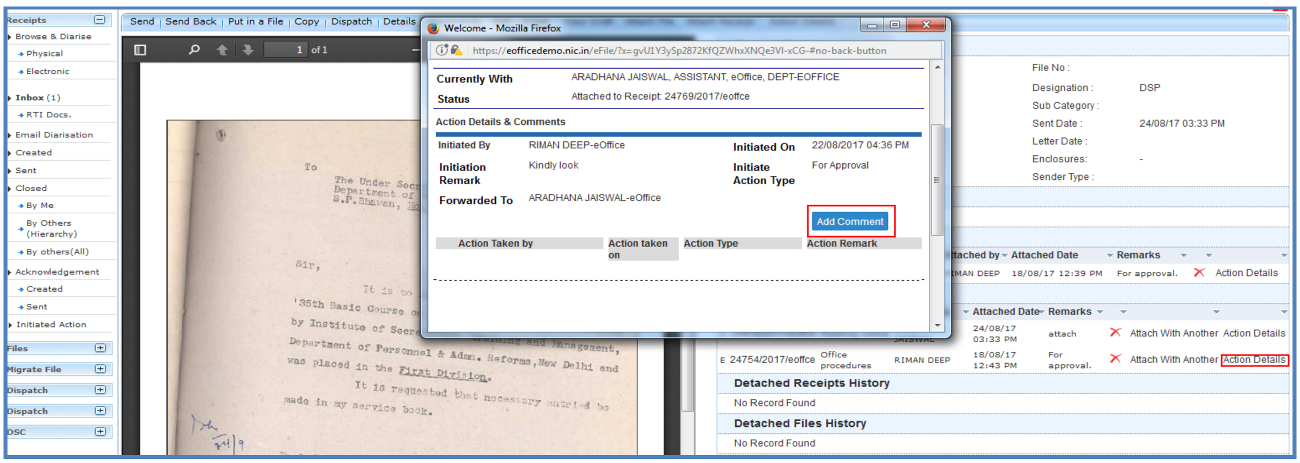


Fig.91

- Provide Action Type, remarks and click the **Add** button, as shown in **Fig.92**:

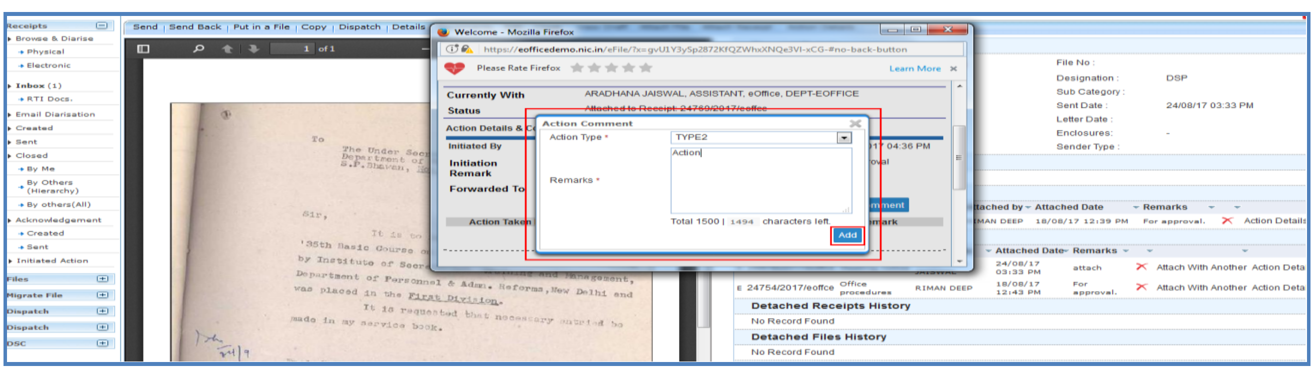


Fig.92

Closing of Action:

To close the initiated action click "**Initiated Action**" sub-module of receipts as shown in **Fig.93**:

List of Records will be displayed with filters such as:

- ➢ Initiated Date range (Default range 1 month)
- ➢ Initiation Type
- ➢ Action status (Default Active)
- ➢ Forwarded To: Department, Section
- ➢ Action Type

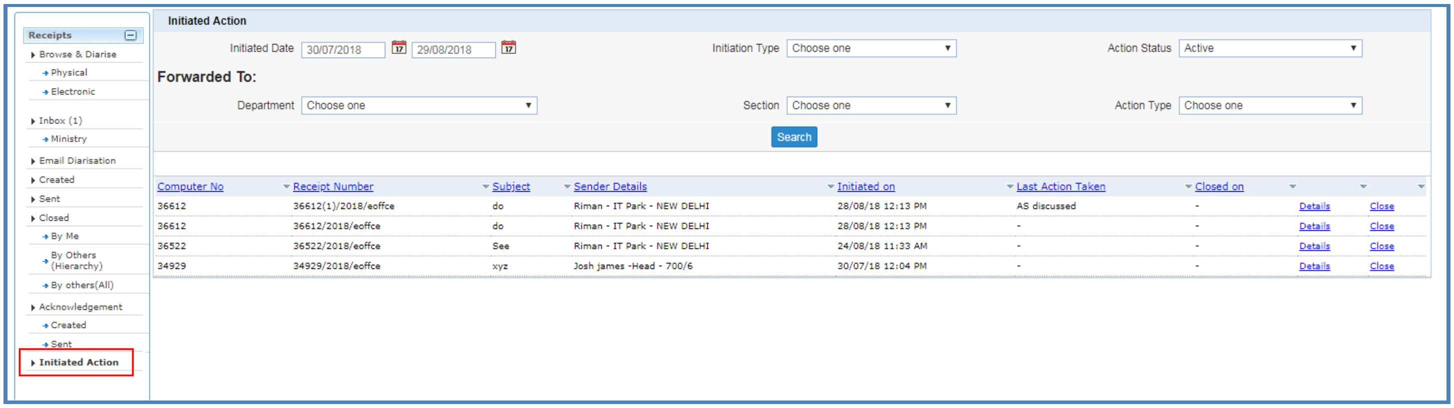


Fig.93

To **View action details** and **Close** the action, perform the following steps:

1. **Details**: To view the action details, click Details link adjacent to each receipt as shown in **Fig.94**:

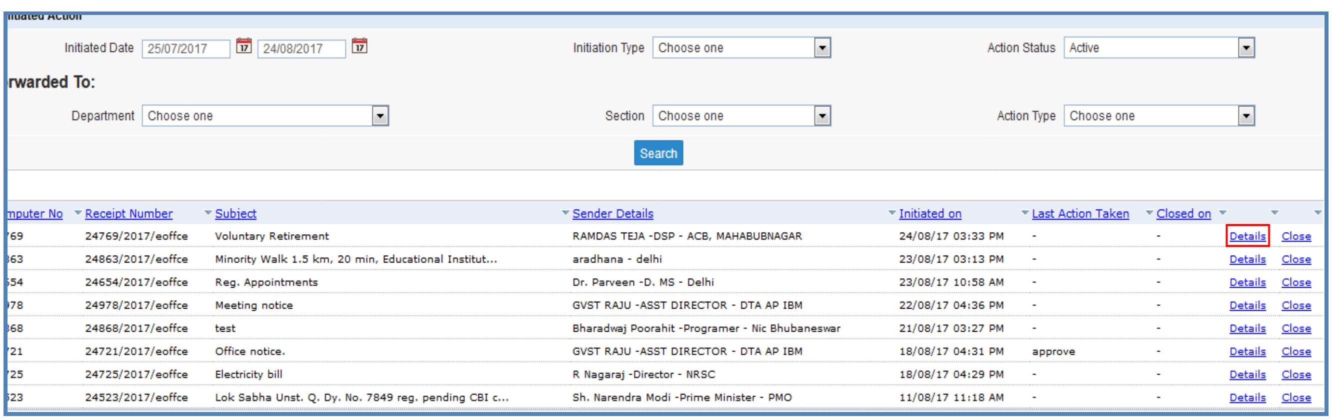


Fig.94

- The action details screen appears is shown in **Fig.95:**

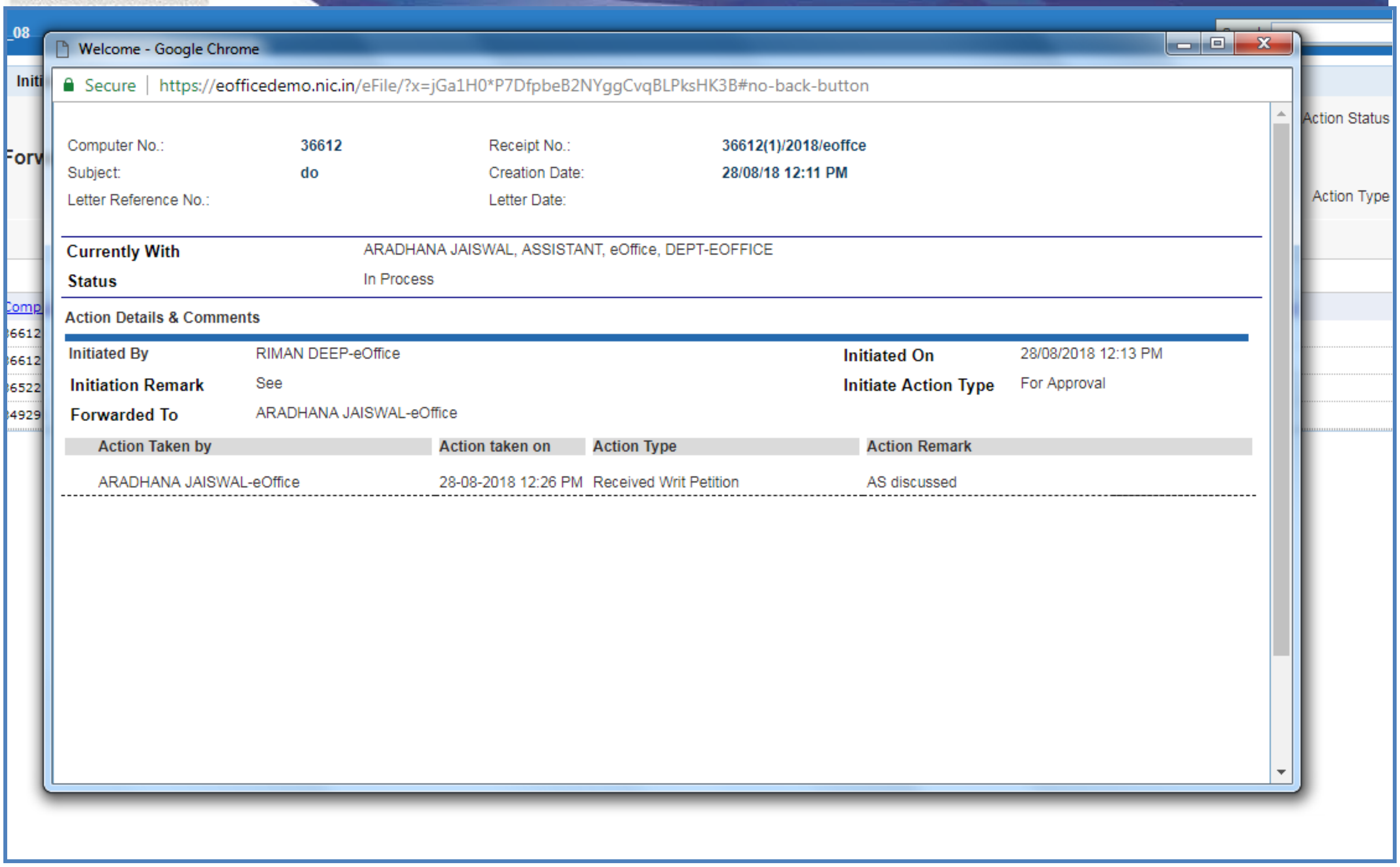


Fig.95

2. **Close**: To close the initiate action, click Close link, the closing confirmation popup window appears. Enter remarks to close an open Action as shown in **Fig.96** & **Fig.97**:

Note:

Initiated actions can be closed by users of the initiator section (with role: Role_Action_Initiatior) .

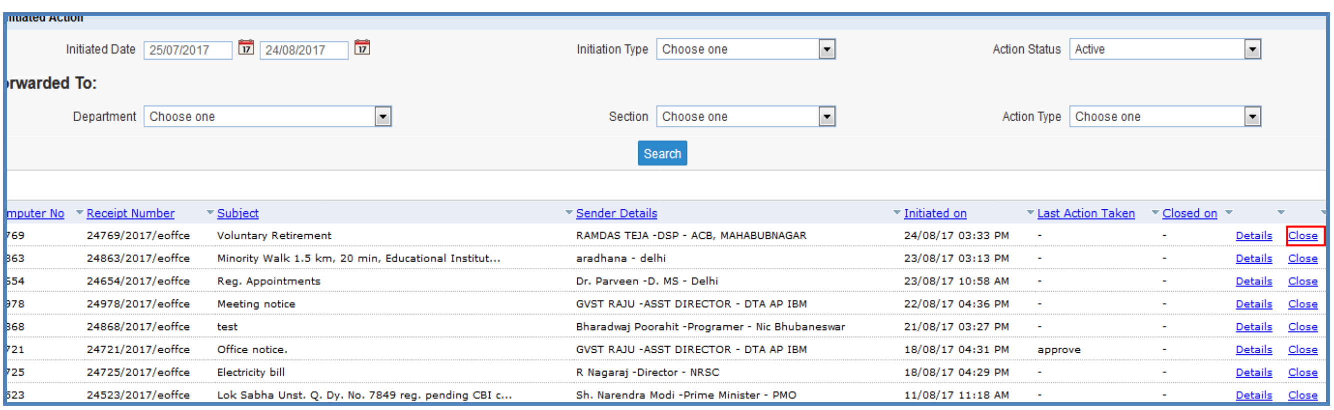


Fig.96

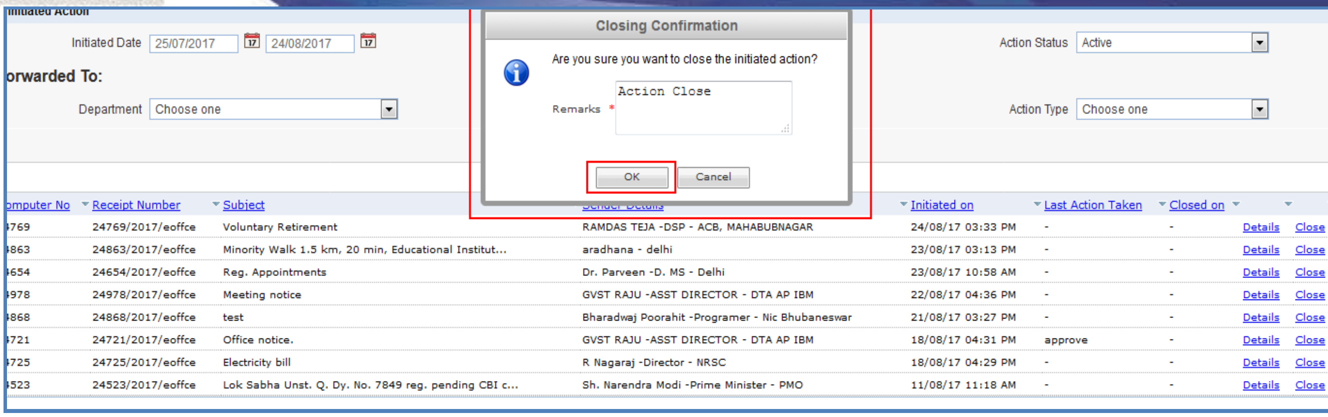

Initiated Action
Initiated Date 25/07/2017 24/08/2017
Action Status Active
orwarded To:
Department Choose one
Action Type Choose one
Closing Confirmation
Are you sure you want to close the initiated action?
Remarks *
Action Close
OK
Cancel
omputer No
Receipt Number
Subject
Initiated on
Last Action Taken
Closed on
24769/2017/eoffce Voluntary Retirement RAMDAS TEJA -DSP - ACB, MAHABUBNAGAR 24/08/17 03:33 PM
24863/2017/eoffce Minority Walk 1.5 km, 20 min, Educational Institut... aradhana - delhi 23/08/17 03:13 PM
24654/2017/eoffce Reg. Appointments Dr. Parveen -D. MS - Delhi 23/08/17 10:58 AM
24978/2017/eoffce Meeting notice GVST RAJU -ASST DIRECTOR - DTA AP IBM 22/08/17 04:36 PM
24868/2017/eoffce test Bharadwaj Poorahit -Programer - Nic Bhubaneswar 21/08/17 03:27 PM
24721/2017/eoffce Office notice. GVST RAJU -ASST DIRECTOR - DTA AP IBM 18/08/17 04:31 PM approve
24725/2017/eoffce Electricity bill R Nagaraj -Director - NRSC 18/08/17 04:29 PM
24523/2017/eoffce Lok Sabha Unst. Q. Dy. No. 7849 reg. pending CBI c... Sh. Narendra Modi -Prime Minister - PMO 11/08/17 11:18 AM
Details
Close

Fig.97

Files

A File is a collection of related records which comprises of Receipts, Noting, Drafts, References, and Linked Files

There are various sub-modules available under Files module, as shown in **Fig.98**:

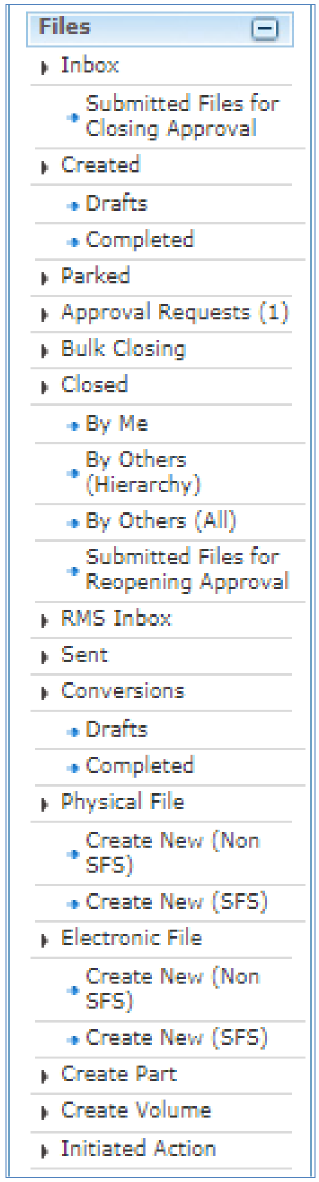


Fig.98

Inbox

File Inbox sub module displays all the **incoming** files that have been marked to the logged in user.

There are **six** action tabs provided in Files Inbox as shown in **Fig.99**:

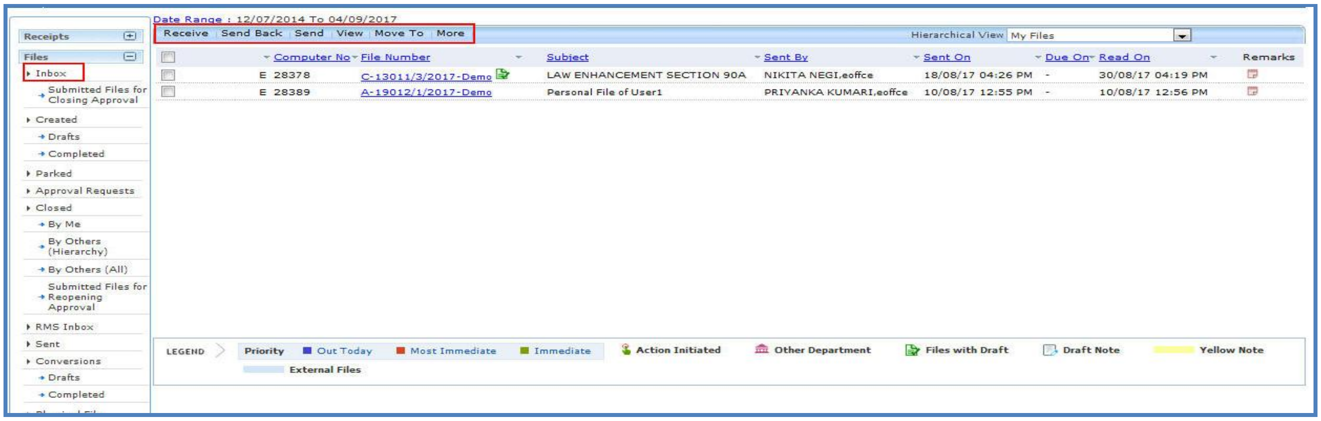


Fig.99

- Click the File number to view the content and other details of File.

Note:

The "E" and "P" is used to differentiate between Electronic and Physical File respectively.

Let's study about these menus in detail.

1. **Receive**: It is used to receive the Physical File as shown in the **Fig.100**. Without receiving the physical file user cannot take any action on that particular file.

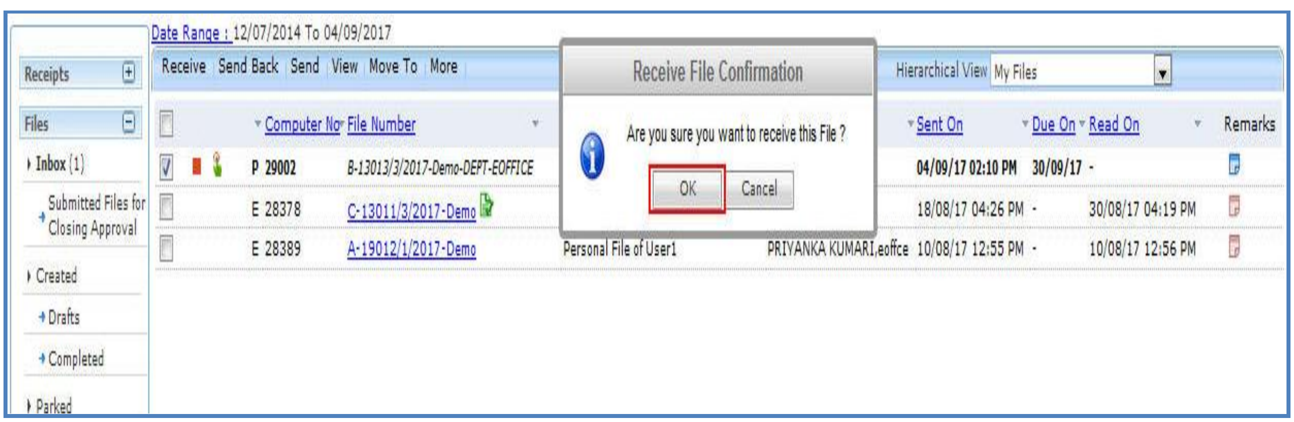


Fig.100

2. **Send Back**: It is used to send the file back to the sender of the File.

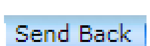
- Select the file and click the  tab, as shown in **Fig.101**:

Fig.101

- The **Send screen** with the **To** field auto populated with the name of the previous sender appears, , as shown in **Fig.102**:

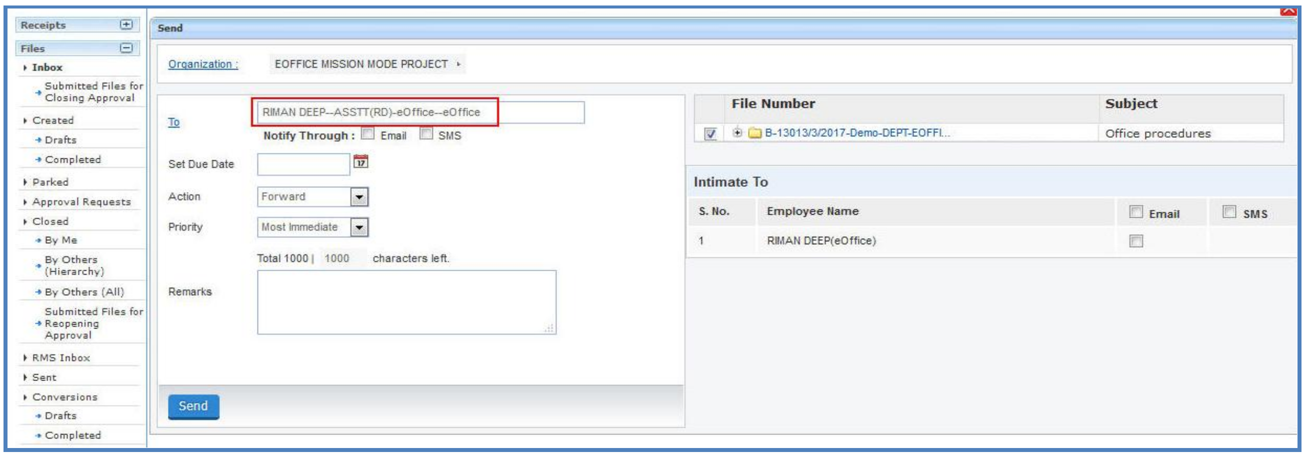


Fig.102

Note:

Further refer the steps mentioned under Send action tab of File Inbox sub-module.

3. **Send**: This option facilitates the user to mark the File(s) to the intended recipient(s).

   To send files user has to perform following steps:

   - Select the File(s) and click the **Send (** Send **)** tab as shown in **Fig.103**:

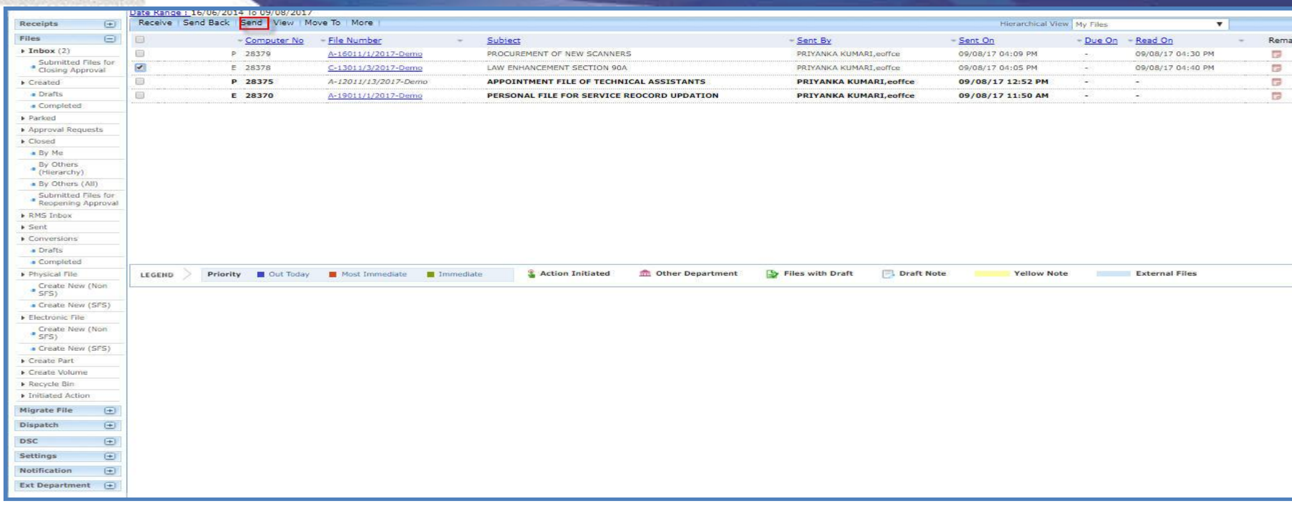


Fig.103

- The **Send** screen appears. Select the radio button internal or external to send the file within the organization or to send the file to another organization.
- Select the recipient, as shown in **Fig.104.**

a) **To**: In the **To** field, search the user either by **name** or **marking abbreviation** or **section/organization unit name** of the recipient. Then, select the officer from the filtered employee list.

Note:

File(s) can be send to single user only.

- Provision of radio button has been made available to select the user from different groups of recipient such as: All, Reporting Officers, Subordinates, Recent 5, In Channel and Preferred List as shown in **Fig.104:**

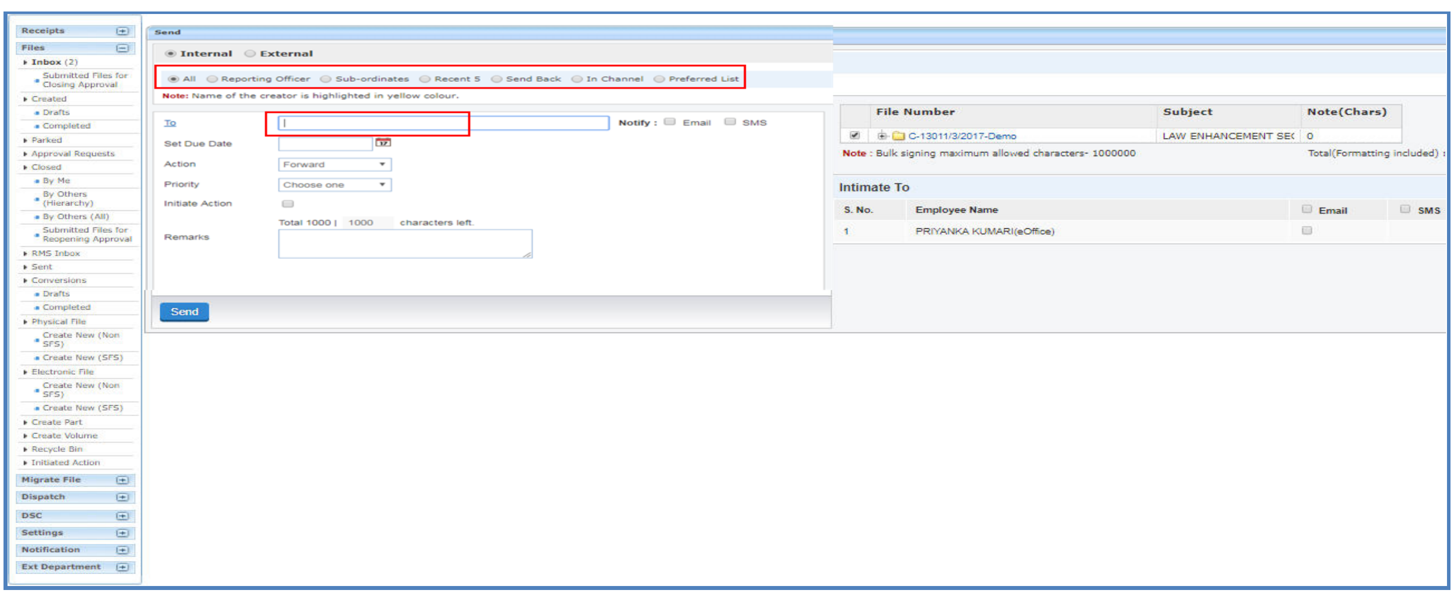


Fig.104

i. **All**: By default, "**All**" remains selected giving the logged in user option to view and select a recipient from all the active users in the department.

ii. **Reporting Officer**: When "**Reporting Officer**" is selected, the 'Send To' list will display the **official just above in the hierarchy** of the logged in employee.

iii. **Sub-ordinates**: When "**Sub-ordinates**" is selected, the list will display the **officials just below in the hierarchy** of the logged in employee.

Note:

To get the name populated in Reporting Officer and Sub-ordinates options, the official's/user's post hierarchy needs to be defined in Employee Master Details (EMD).

iv. **Recent 5**: On its selection, the 'Send To' list displays latest **five distinct users** to whom files were sent/ marked.

v. **Send back**: By selecting "**Send back**", the **To** field gets populated with the name of the **user/employee/officer who forwarded the file to logged in user.**

vi. **In channel**: It helps the user to mark the receipt to officials who are **already in the submitted channel of the file.**

Note:

When user is sending multiple files, Send Back and In Channel radio buttons will not be available.

vii. **Preferred List**: It helps to select officials from the list of "**Preferred List**" already created by the user.

Note:

To create the preferred List Click the To link→Go to Contacts tab→select the users by selecting the check box or by searching the name in search box and then selecting the check box → click Add to: Preferred List link.

b) **Due date**: Date by which work is supposed to be done. Assign a **Due Date** to the recipient using the **Set Due Date** option.

c) **Action**: An easy way to notify the recipient the action that is required on file. Select **Action** which is to be taken, from the dropdown menu.

d) **Priority**: It is the preference assigned to the file based on its urgency. Set the **Priority** of the file, from the dropdown menu.

e) **Initiate Action**: It is used to track the set of action(s) taken on any file. Check the **Initiate Action** check box, provide initiation type to **initiate** action and **track** the actions that will be taken on the file.

f) **Remarks**: These are the forwarding comments given on file while sending them to recipient. Type forwarding remarks in the Remarks field.

Note:

In case initiate action is selected, then Remarks field becomes mandatory.

g) **Notify Through**: It is to send the notification through Email & SMS to the recipient.

h) **Intimate To**: It is to send SMS/Email intimation alert to the Officer(s) who were in part of movement while sending the file. List of users gradually gets updated after each movement and only active users will be available in the list for intimation.

- In case of forwarding multiple Files, the "Intimate To" feature will not be available.
- After selecting the recipient and entering other details, user can send the file using any of the following **Send** options:

a) **Send**: On clicking Send button, the file will be marked to the intended user.

b) **DSC Sign and Send**: On clicking DSC Sign and Send button, a pop up window appears asking for the **DSC** token Pin. Enter the **Pin** and click OK button and the file is sent.

Note:

For complete process refer to Annexure-III (Digital Signing of File Noting).

c) **eSign and Send**: On clicking eSign and Send button, a pop up window appears asking to continue the agreement with "I Agree". Enter the **OTP** received on Aadhaar registered mobile number and click OK button.

Note:

For complete process refer to Annexure-IV (eSigning of File Noting)

- The Digital Signature/eSign appears on the File Remarks in Movement Details Page.
- Once the file is sent using any of the above Send option, the file will be visible in the Inbox of recipient. The user who sent the file can check the details of the file in his/her own Sent folder.

4. **View**: It is used to sort the files based on different criteria such as Most Immediate, Action Initiated, Other Department, Due Date Elapsed etc.

- Keep the cursor on View tab and a drop down menu will appear with the options as shown in **Fig.105**:

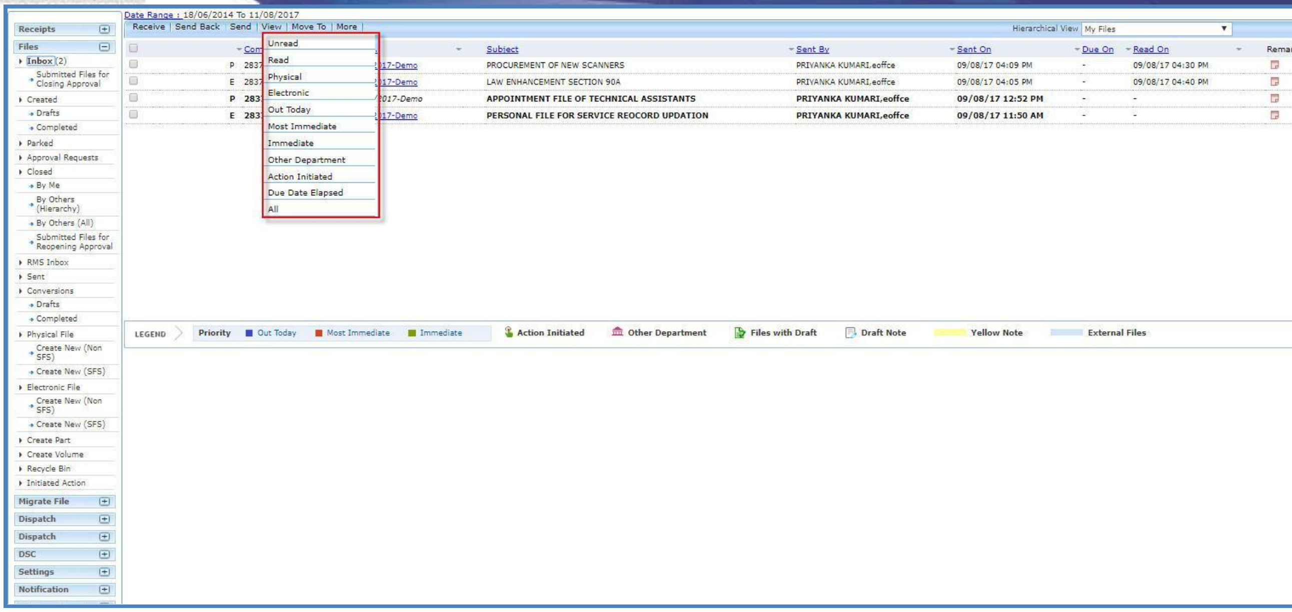


Fig.105

a) **Unread**: To view all unread electronic files and unreceived physical files.

b) **Read**: To view all read electronic files and received physical files.

c) **Physical**: To view all physical files.

d) **Electronic**: To view all electronic files.

e) **Out Today**: To view all the files those are marked with priority as Out Today.

f) **Most Immediate**: To view all the files those are marked with priority as Most Immediate.

g) **Immediate**: To view all the Prioritized files marked as Immediate.

h) **Other Department**: To view the files of other Departments in the same instance.

i) **Action Initiated**: To view the files on which some action has been initiated.

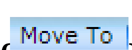
j) **Due Date Elapsed**: To view all those files for which due date as set during sending / marking of the files has elapsed.

k) **ALL**: To view all the incoming files from the latest to the oldest order (Default View)..

5. **Move To**: It is used to categorize the files into subfolders under **File Inbox**.

To create New Folder or manage existing ones, perform the following steps:

- Select file(s) from the File Inbox which needs to be moved.

Move the cursor on (

) tab, a drop down menu will appear with the options as shown in **Fig.106**:

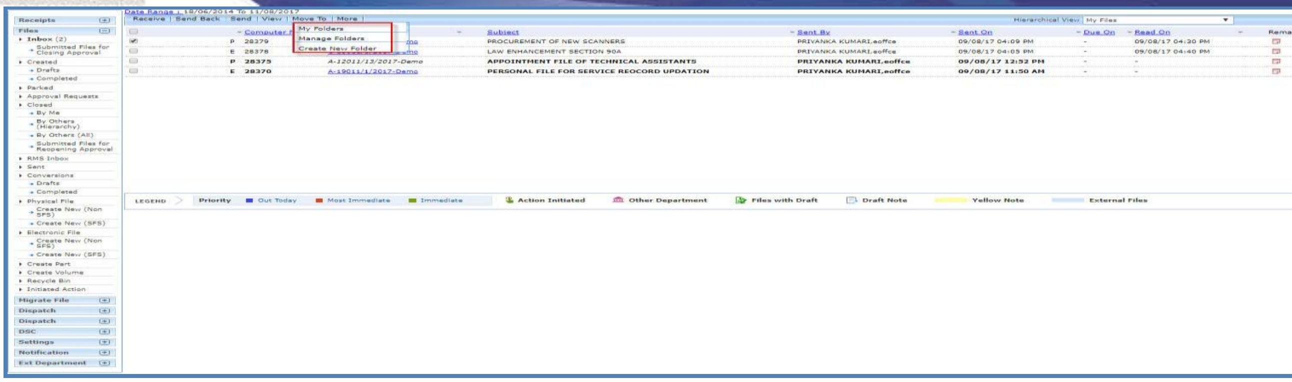


Fig.106

a) **Create New Folder**: Click the **Create New Folder** link from the dropdown, as shown in **Fig.107**:

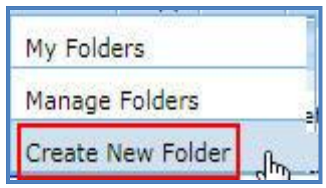


Fig.107

- The screen appears is shown in **Fig.108**. Enter the **Folder Name** and select the Folder in which new folder is to create. Click the  button as shown in , **Fig.108:**

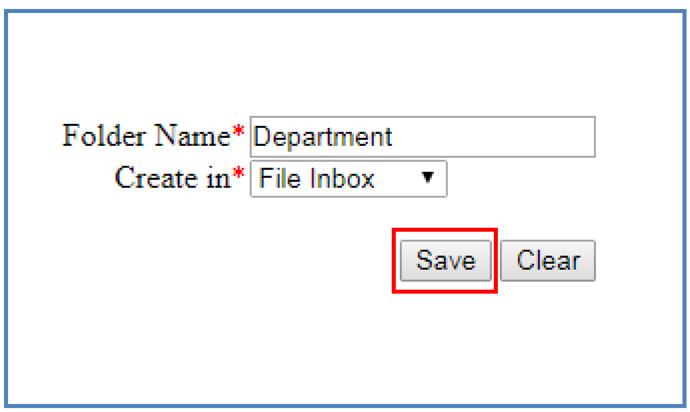


Fig.108

- The new folder is created under **Inbox** as sub folder.

b) **My Folders**: Click the **My Folders** link from the dropdown menu to move the file either in Inbox or in its subfolders.

c) **Manage Folders**: Click the **Manage Folders** link from the dropdown menu to **Delete** () or **Edit** () the folders created under File Inbox.

6. **More**: It is used to Park the active file, check closing/parking history and to create volume.

a) **Park File**: It is used for storing the files which are currently not in use, but can be used later.

To a park a file, perform the following steps:

- Select the file and click **Park File** link from the dropdown as shown in **Fig.109**:

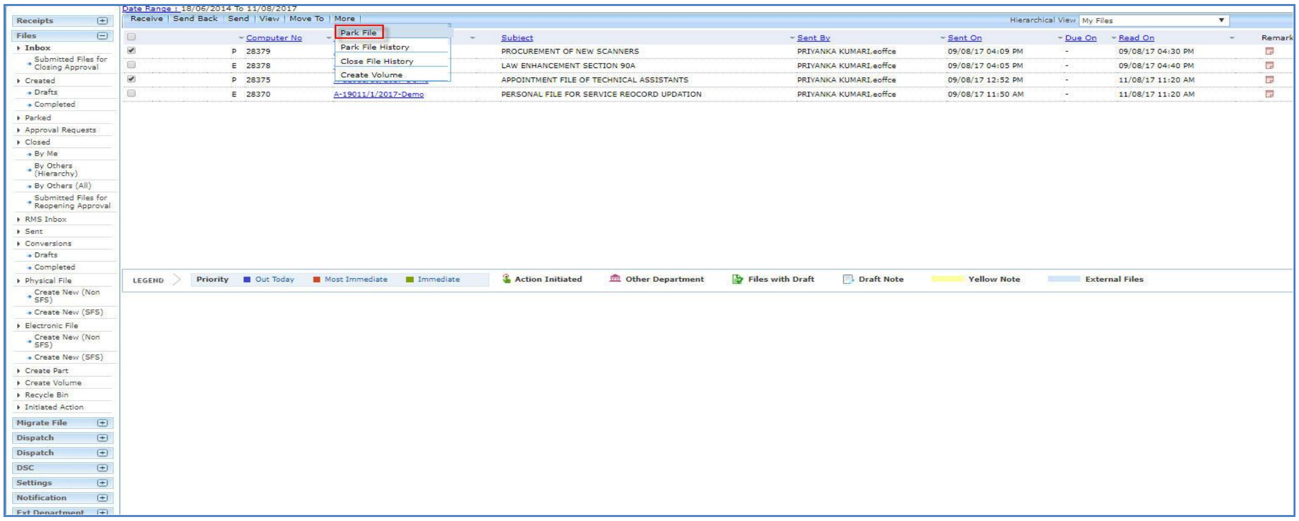


Fig.109

- The Parking Confirmation dialogue box appears, enter the **Parking Remarks** and **Parking Due Date** as required and click OK button, as shown in **Fig.110**:

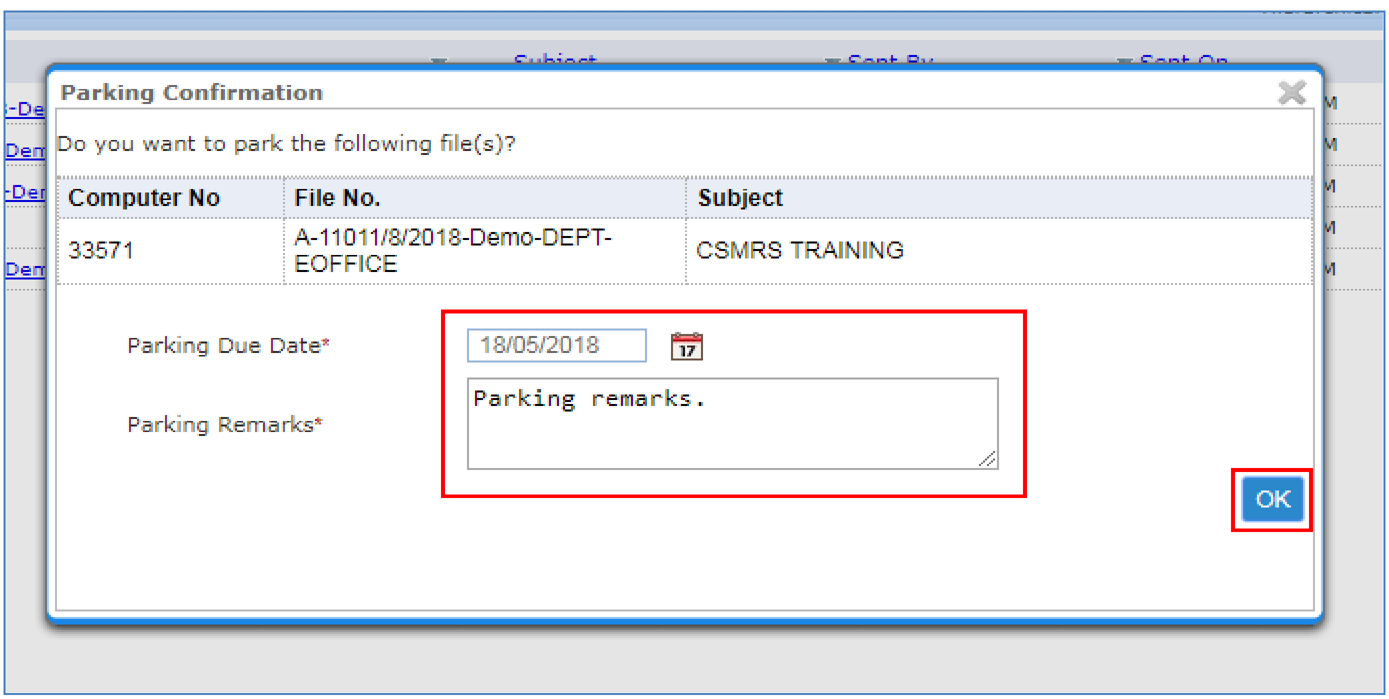


Fig.110

- The file gets moved to the Parked folder from the Inbox sub-module,

b) **Park File History**: It displays the history of the parked file.

- Select the file and click **Park File History** link from the dropdown as shown in **Fig.111**:

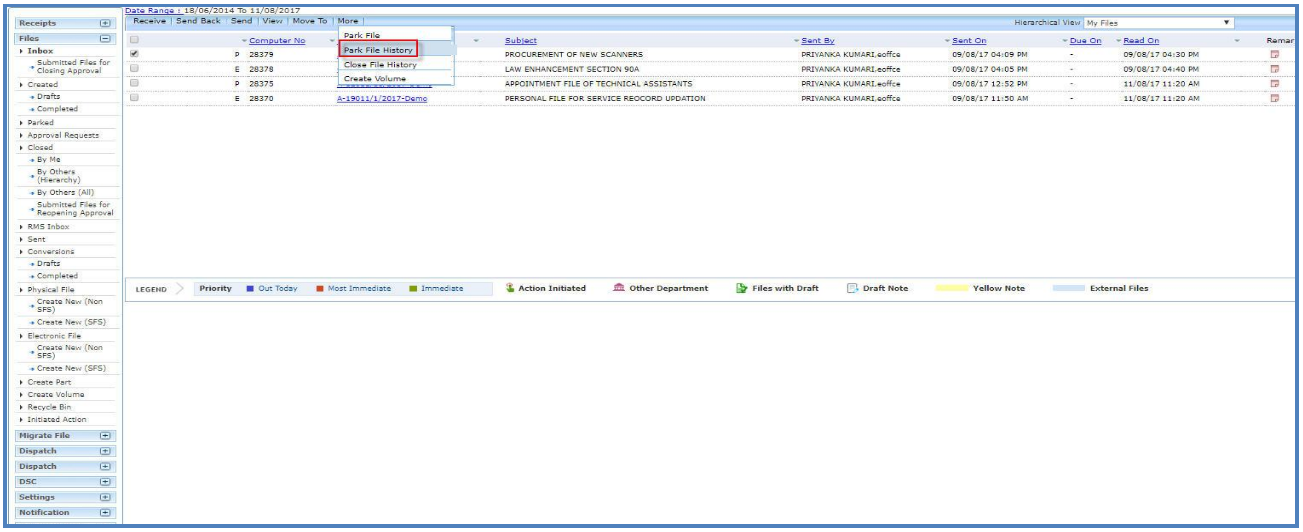


Fig.111

- The Parked File history is displayed in **Fig.112:**

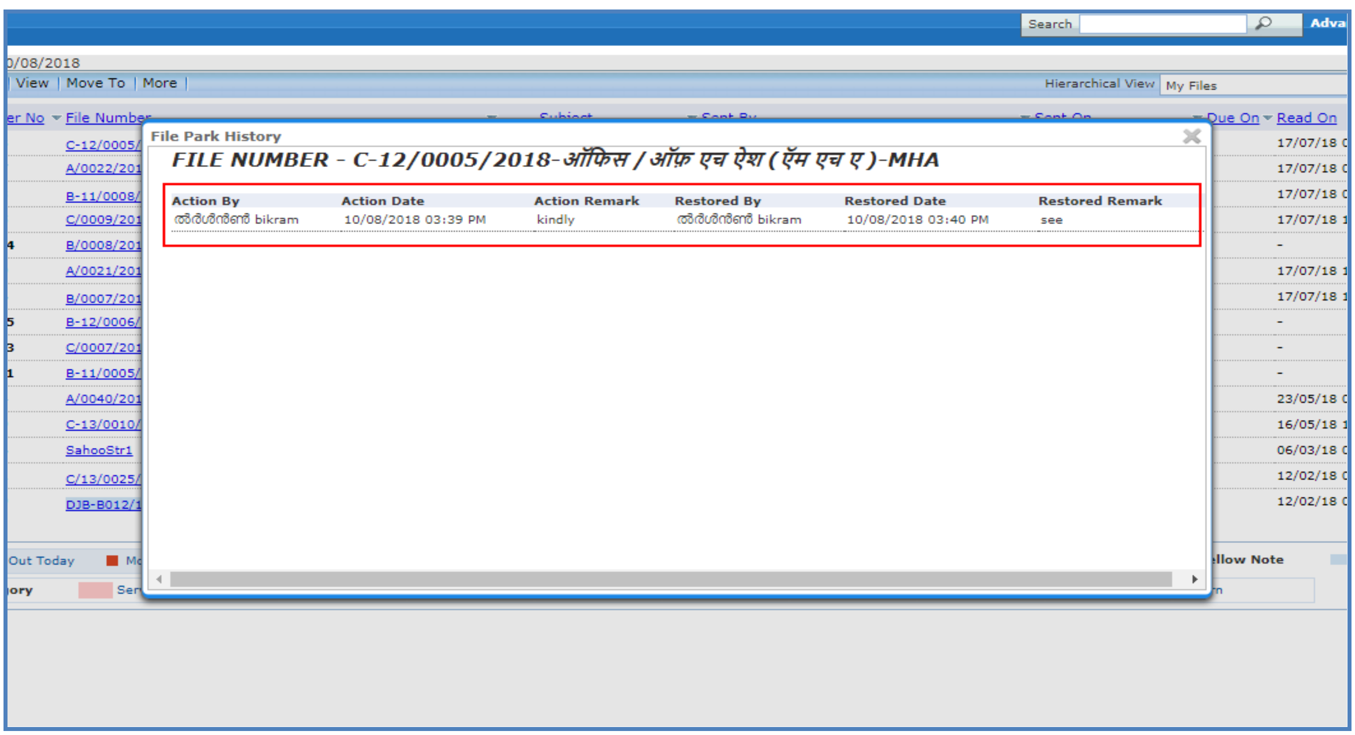


Fig.112

c) **Close File History**: It displays the history of the closed file.

- Select the file and click **Close File History** link from the dropdown as shown in **Fig.113**:

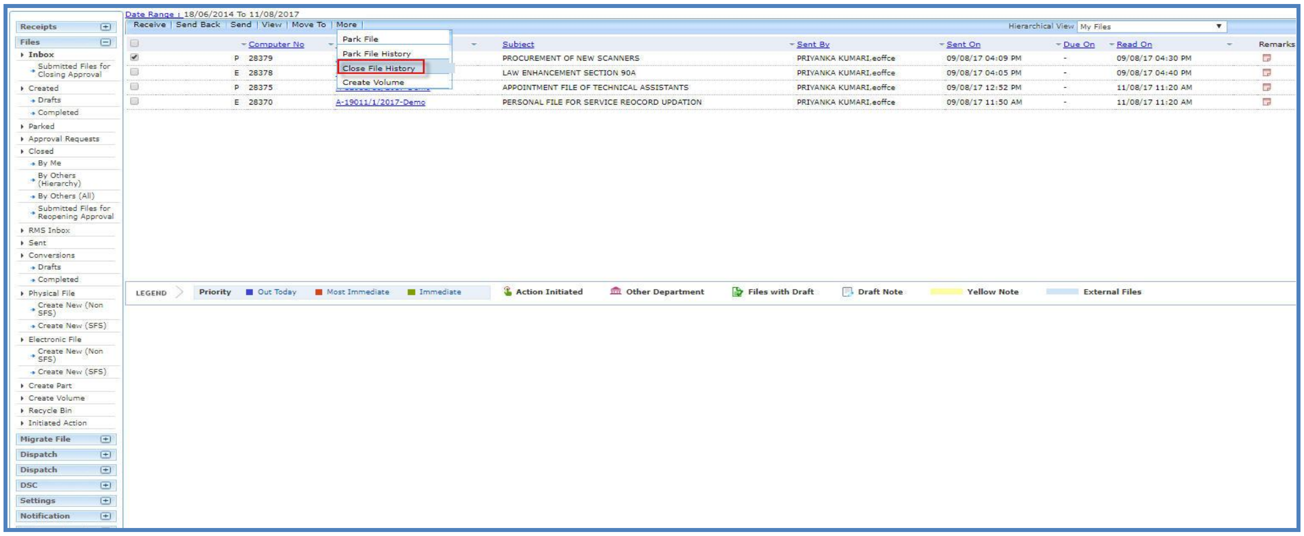


Fig.113

- The Closed File history is displayed in **Fig.114**:

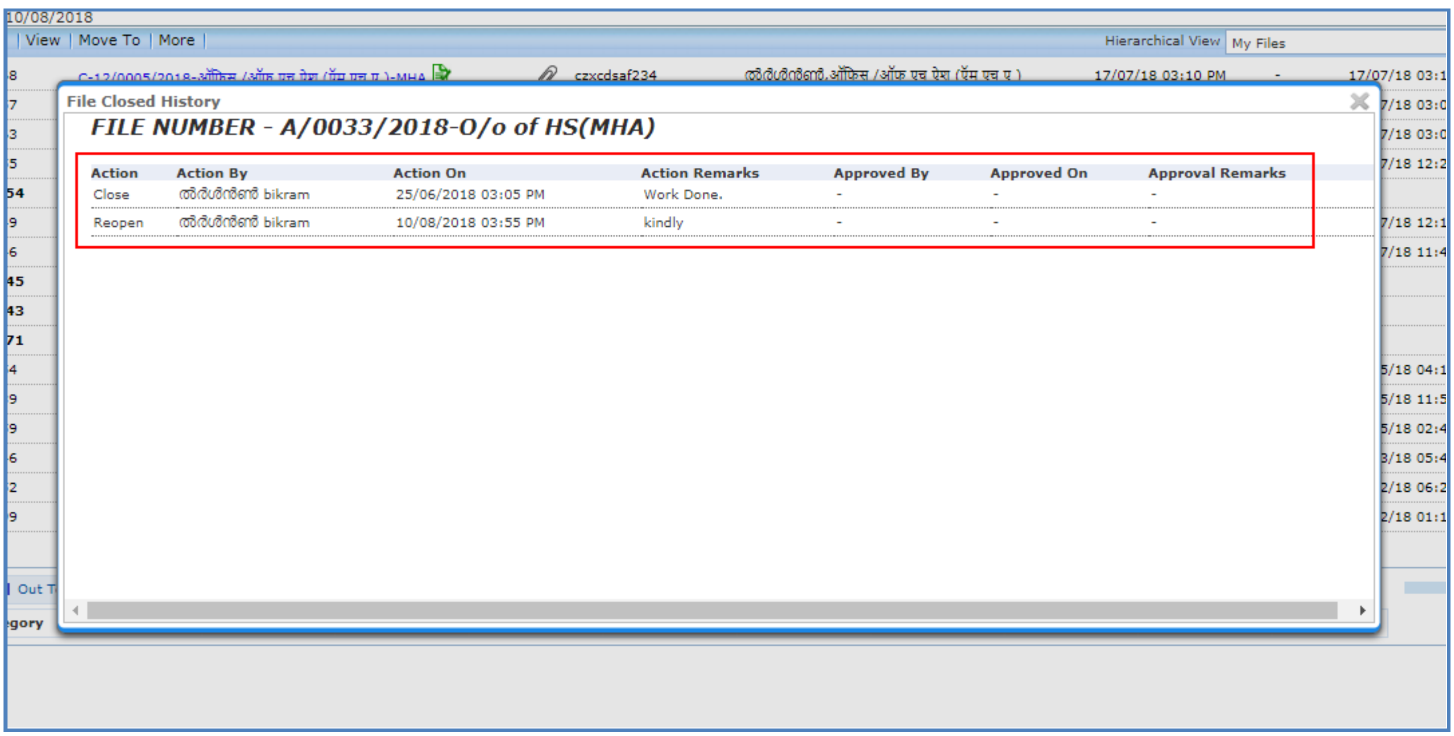


Fig.114

d) **Create Volume**: It is used to create a new **Volume** of an existing **Physical File**.

Not allowed for electronic files.

To create a Volume, perform following steps**:**

- Select the file and click **Create Volume** link from the dropdown as shown in **Fig.115**:

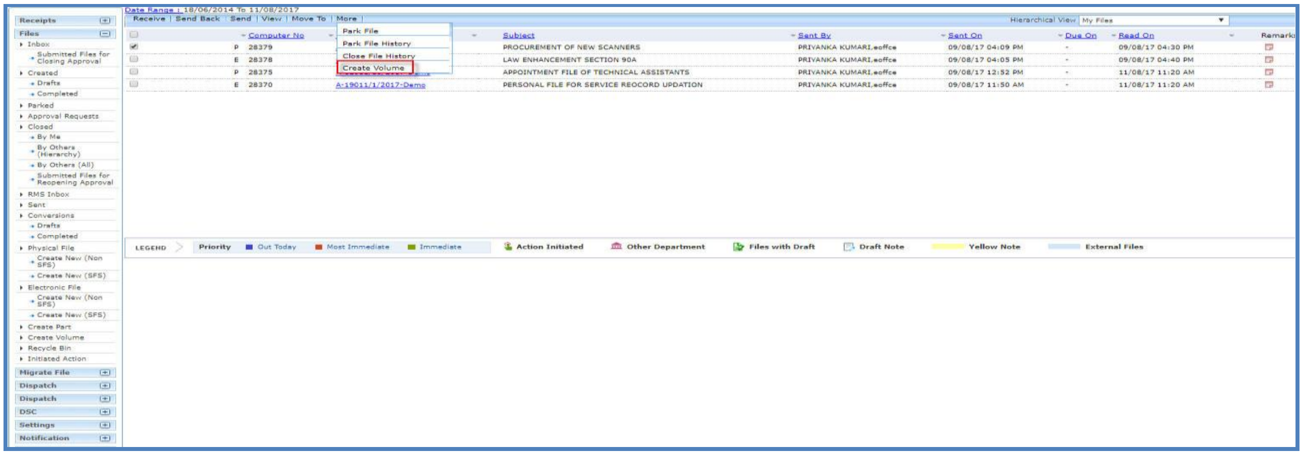


Fig.115

- The volume file creation screen appears with prefilled file details (like File Number, Description, and Category etc.) as shown in **Fig.116**:

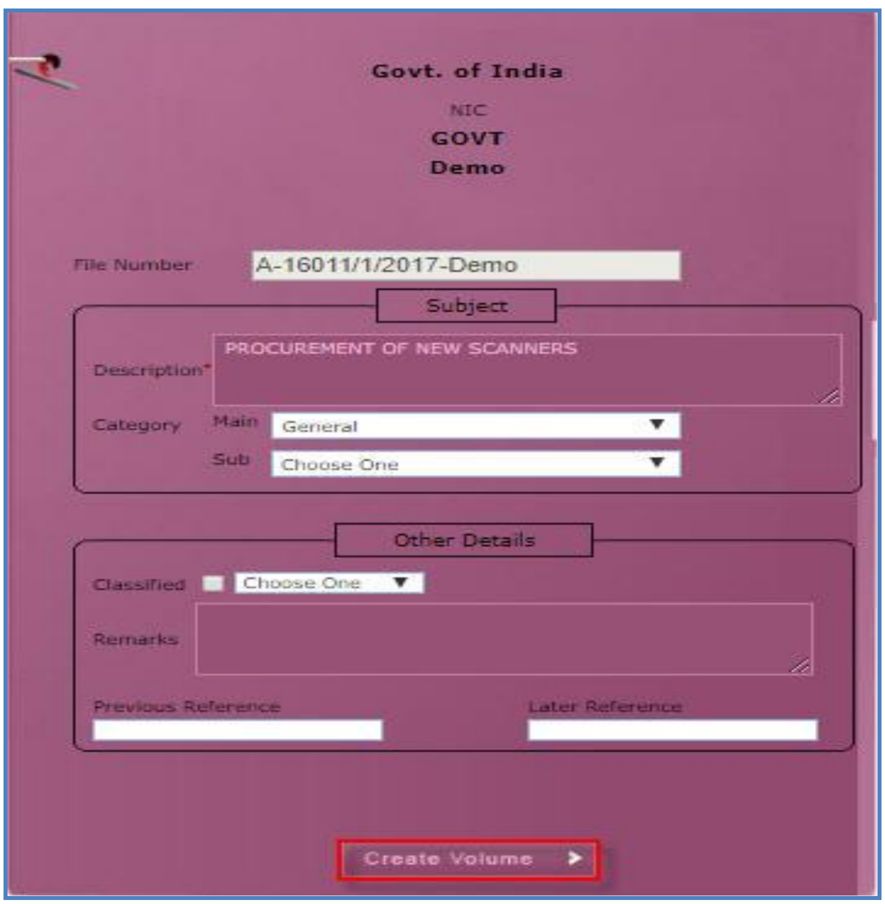


Fig.116

Note:

All the details can be updated if required, except the File number.

- Click **Create Volume** button as shown in **Fig.117.**
- The volume file is created with suffix adjacent to file number as shown in **Fig.117**:

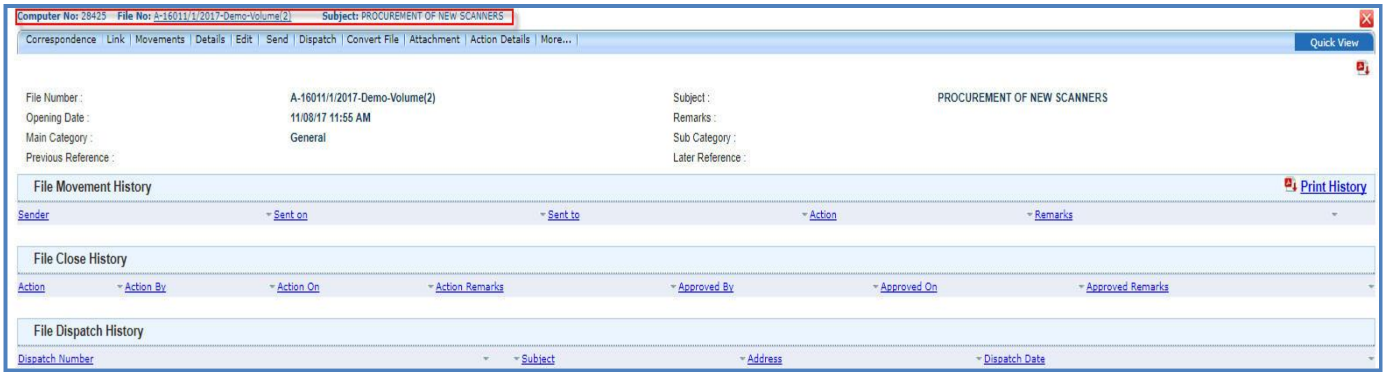


Fig.117

Electronic Files Action tabs:

Let us learn following different options available in the menu bar for electronic files.

1. **Noting**: It consists of line actions with regard to the correspondence or as per the subject matter of the file subject. It is used to add Yellow Note and Green Note in the existing File and to view the noting **By Name** and **By Date** or **All** the noting together, as shown in **Fig.118:**

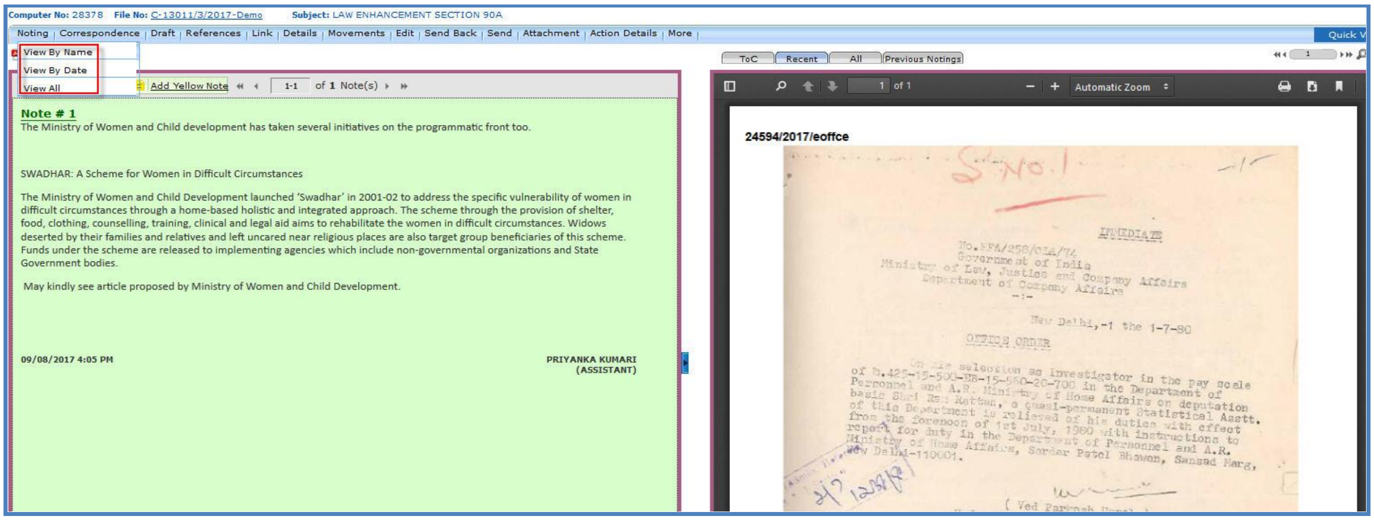


Fig.118

a) **Yellow Note:** Yellow Note is to add a draft note in a file for taking approvals from reporting before finalizing the green note. Once the yellow note is confirmed, it changes to green note sheet.

b) **Green Note:** Note is the document in file on which all decision making/ major facts/ approvals are recorded. Anything recorded on green note of file stays permanently on file if the file is moved at least once.

To add a Yellow Note, perform following steps:

- Click Add Yellow Note link as shown in **Fig.119**:

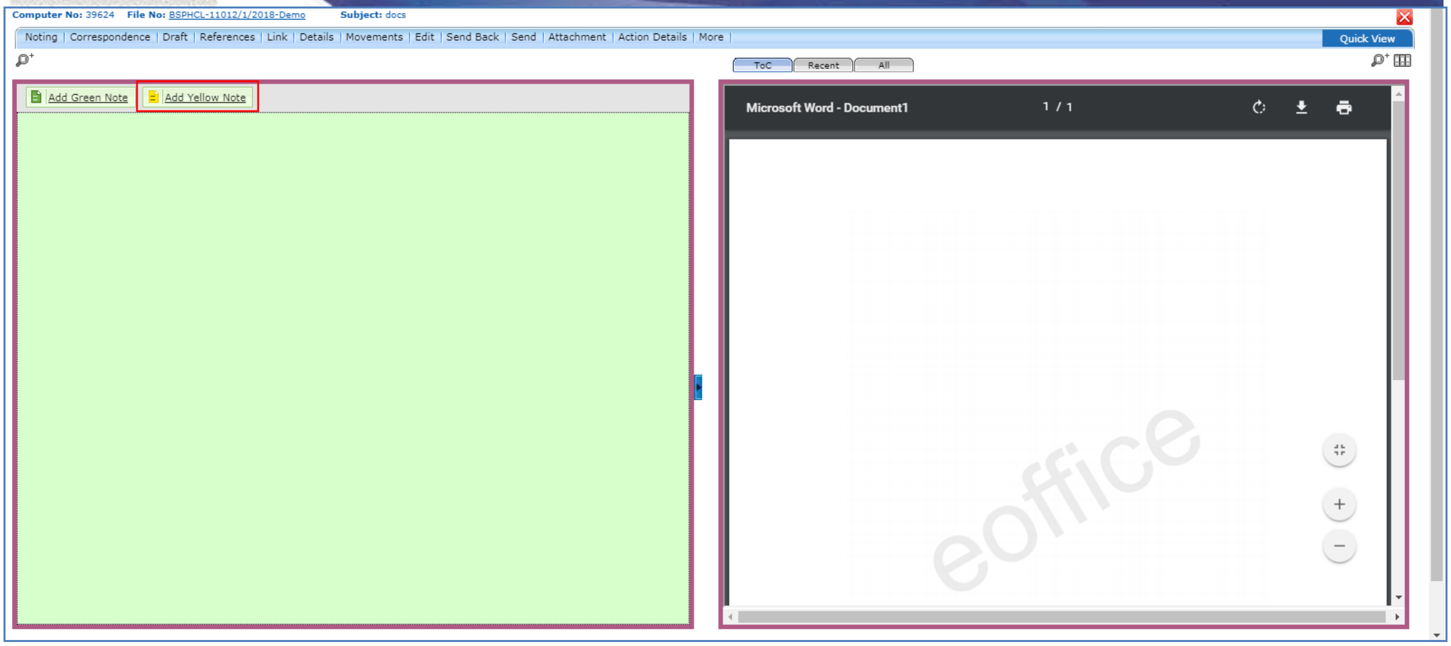


Fig.119

- The Noting screen becomes active. Type the note content manually or copy the content from already created word/ text files and paste it. After adding the content, click Submit button as shown in **Fig.120**:

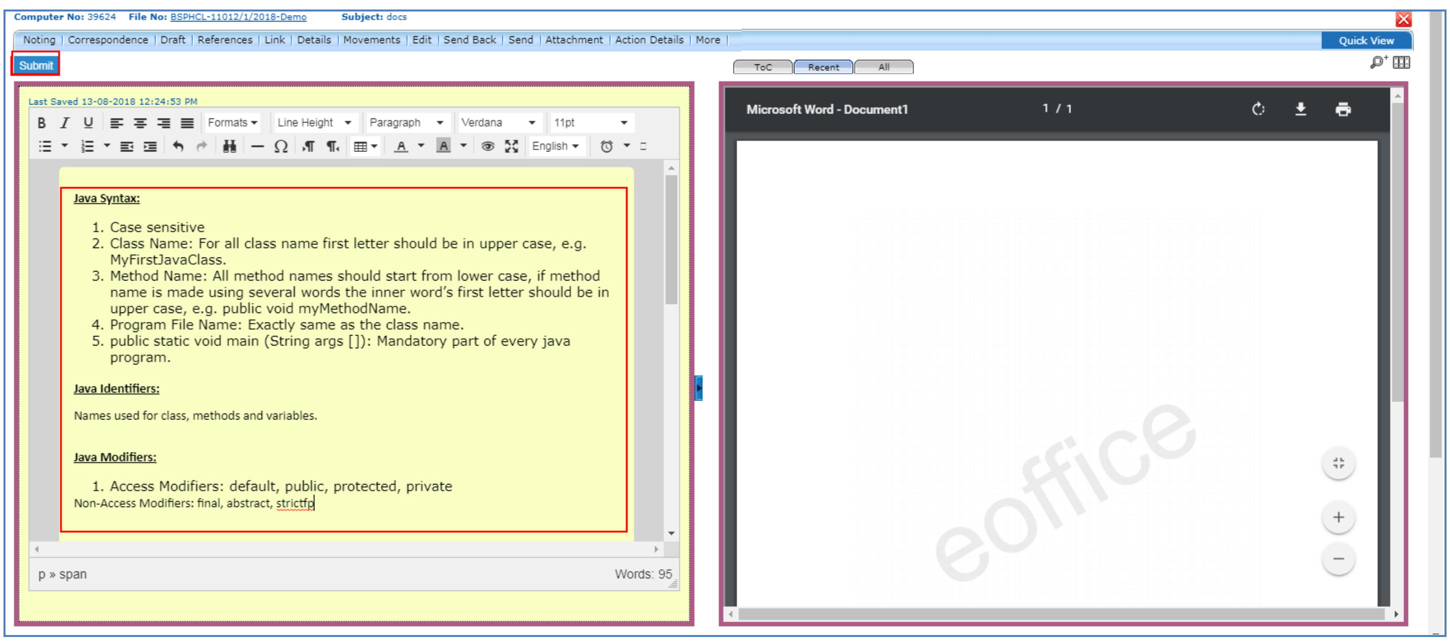


Fig.120

- After the note is saved, the actions provided as per authorization are shown in **Fig.121**:

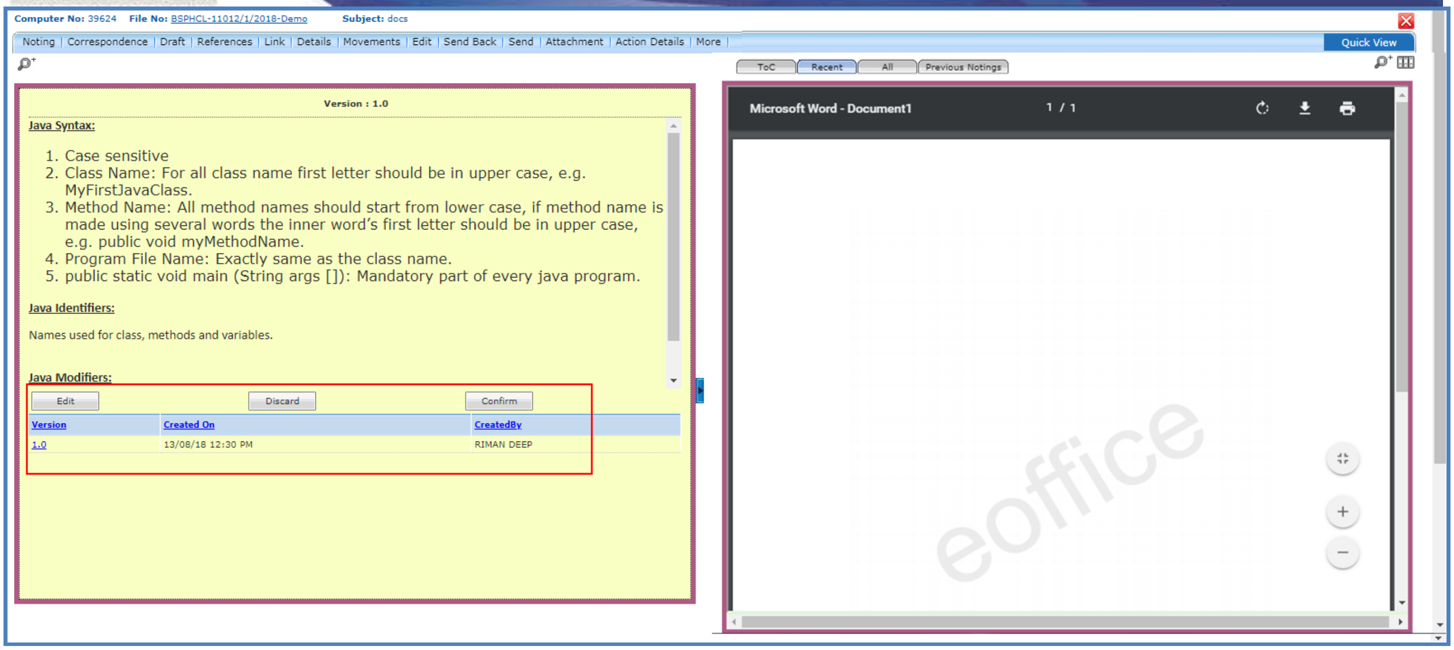


Fig.121

a) **Edit:** To edit the content of note. After each editing a new version of the note is created.

b) **Discard:** To delete the note.

c) **Confirm:** To confirm Yellow Note into Green Note. Once the yellow note is confirmed, the confirmed versions of note will displayed.

To add a Green Note, perform following steps:

- Click Add Green Note link, as shown in **Fig.122**:

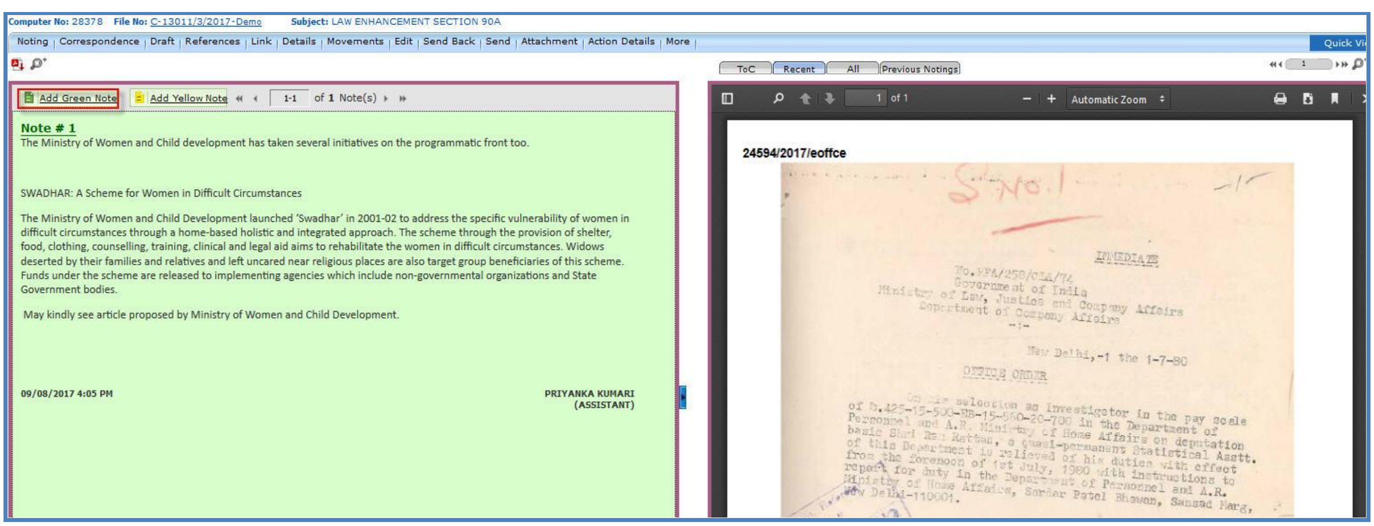


Fig.122

- The Noting screen becomes active. Type the note content manually or copy the content from already created word/ text files and paste it., as shown in **Fig.123**:

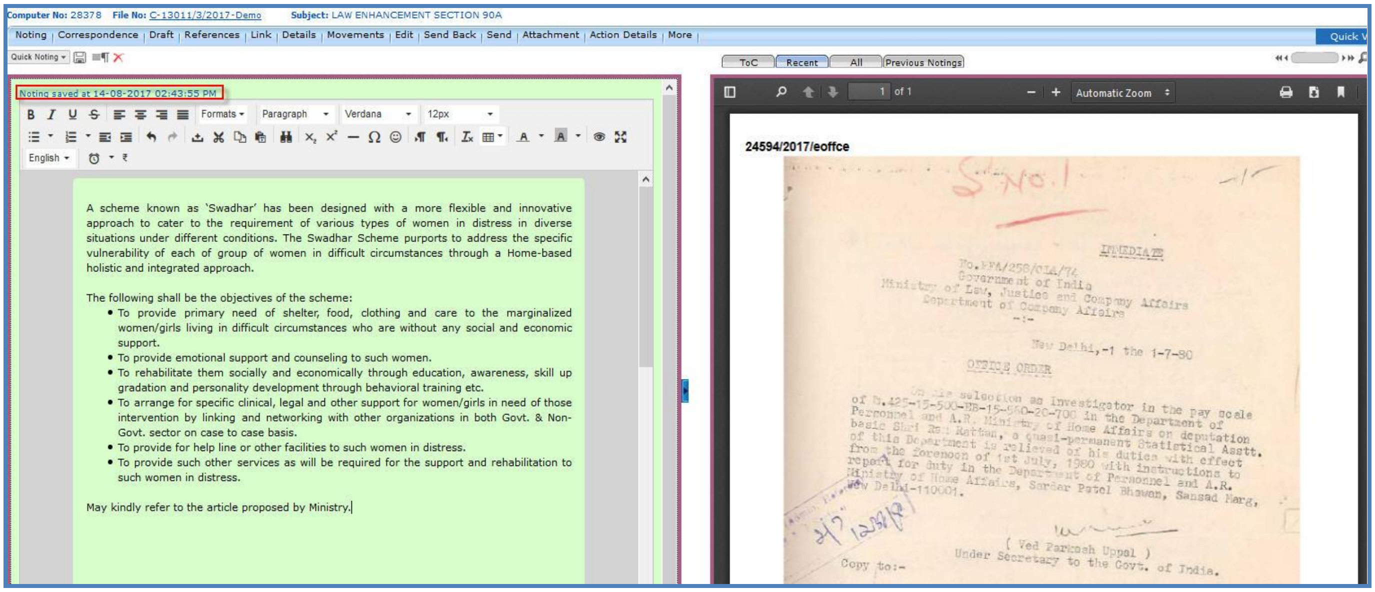


Fig.123

- Noting done gets saved automatically.

- A pre-defined or created by user (In English or Hindi), one-liner noting in Green Note can be added by using Quick Noting feature. It is used to create a customized list of one-liner noting frequently used in organizations.

Note:

To add quick noting list go to Settings→Quick Noting feature.

- The User can also attach supporting documents (PDF Format only) by clicking on Attach button at the bottom of the noting portion as shown in **Fig.124**:

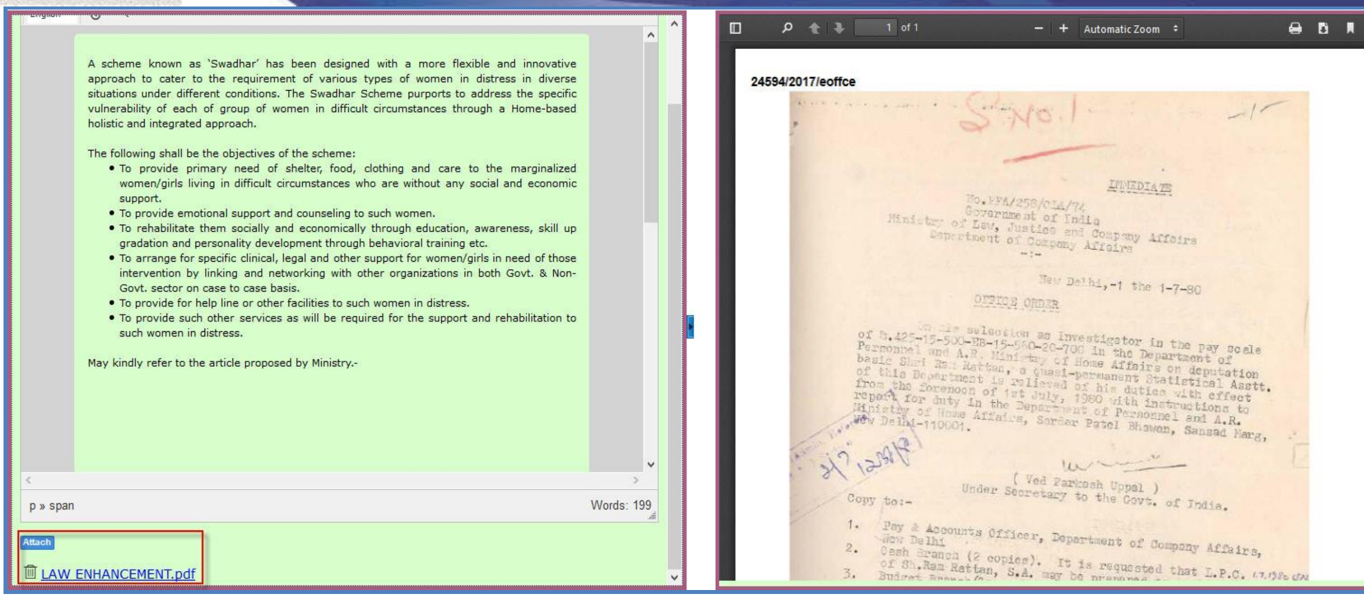


Fig.124

2. **Correspondence**: Correspondence is any letter/ DAK which is diarized for action to be taken in file. It is used to attach Correspondence/ Receipt to the working File.

- Clicking on **Correspondence (** Correspondence **)** button, the list of Correspondence and Issues appears on right side, as shown in **Fig.124**:
- Click Attach button, a list of receipts appears, select the receipt and click Attach button as shown in **Fig.125**:
- User can also search for the receipt using Year and Search fields.

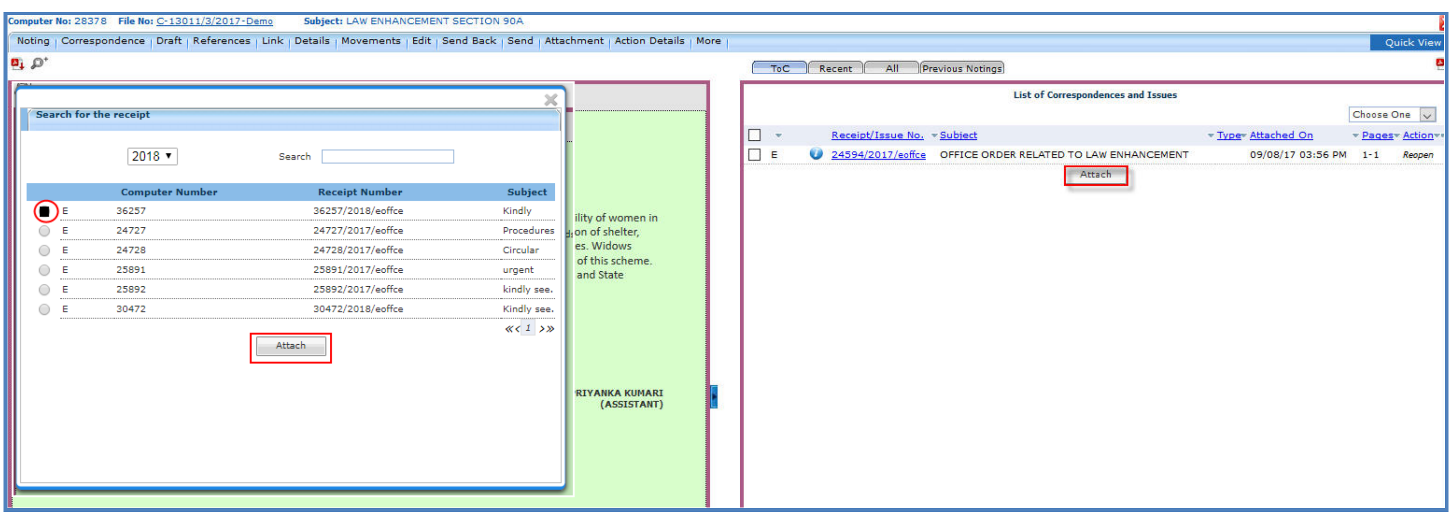


Fig.125

Note:

The list contains receipts which are present in 'Created (Completed)' or 'Inbox' sub-module of Receipt.

- The receipt will be attached as Paper under Consideration (PUC inside the file) and it can be seen on the right side under List of Correspondences and Issues.

Note:

Marking of the receipt such as Fresh Receipt (FR) or PUC can be set from the dropdown menu available at the top of List of Correspondences and Issues page

a) **Mark as PUC**: It is used to mark the receipt as PUC.

To mark a receipt as PUC, perform following steps:

- Select the receipt from the **List of Correspondences and Issues** and mark as PUC link from the dropdown menu as shown in **Fig.126**:

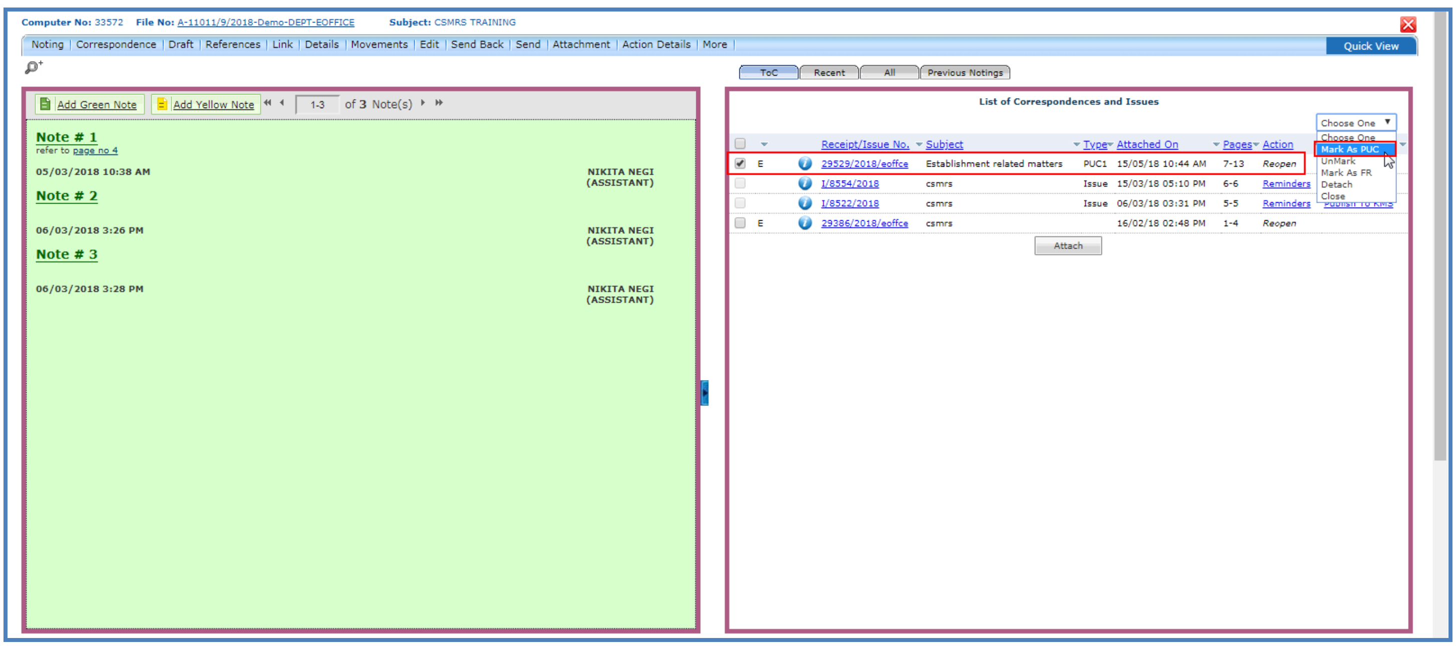


Fig.126

b) **Unmark**: It is used to unmark the receipt which is either marked as PUC or FR.

To unmark an already marked receipt, perform following steps:

- Select the receipt from the **List of Correspondences and Issues** and click **Unmark** link from the dropdown menu as shown in **Fig.127**:

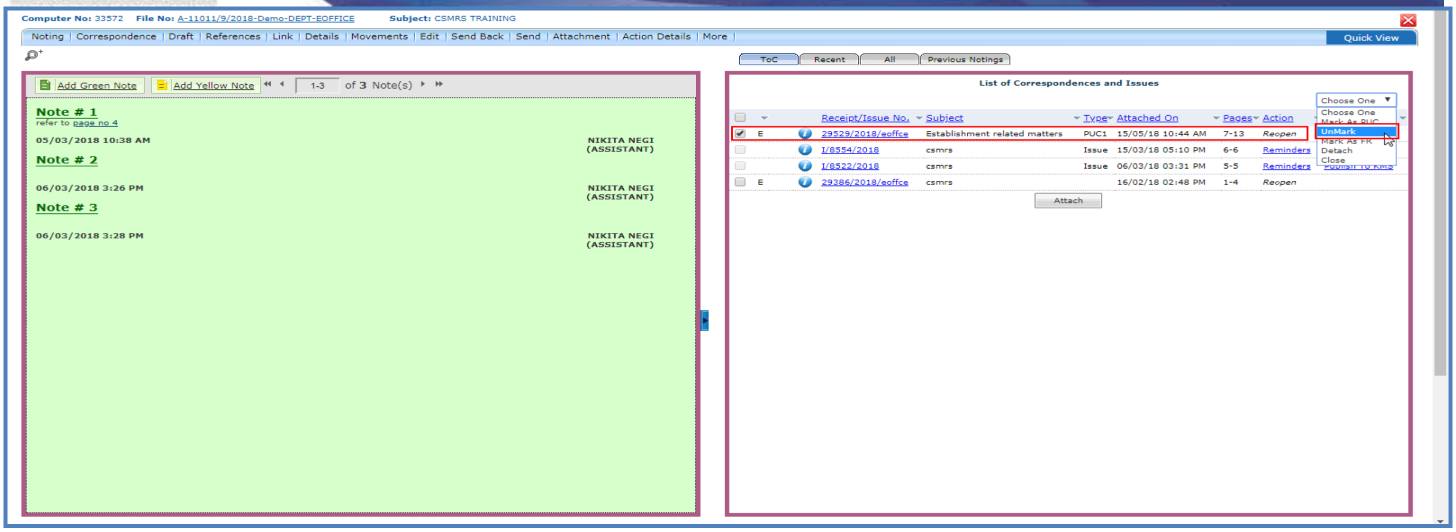


Fig.127

c) **Mark as FR**: It is used to mark the receipt as FR.

To mark a receipt as FR, perform following steps:

- Select the receipt from the **List of Correspondences and Issues** and click **Mark as FR** link from the dropdown menu, as shown in **Fig.128**:

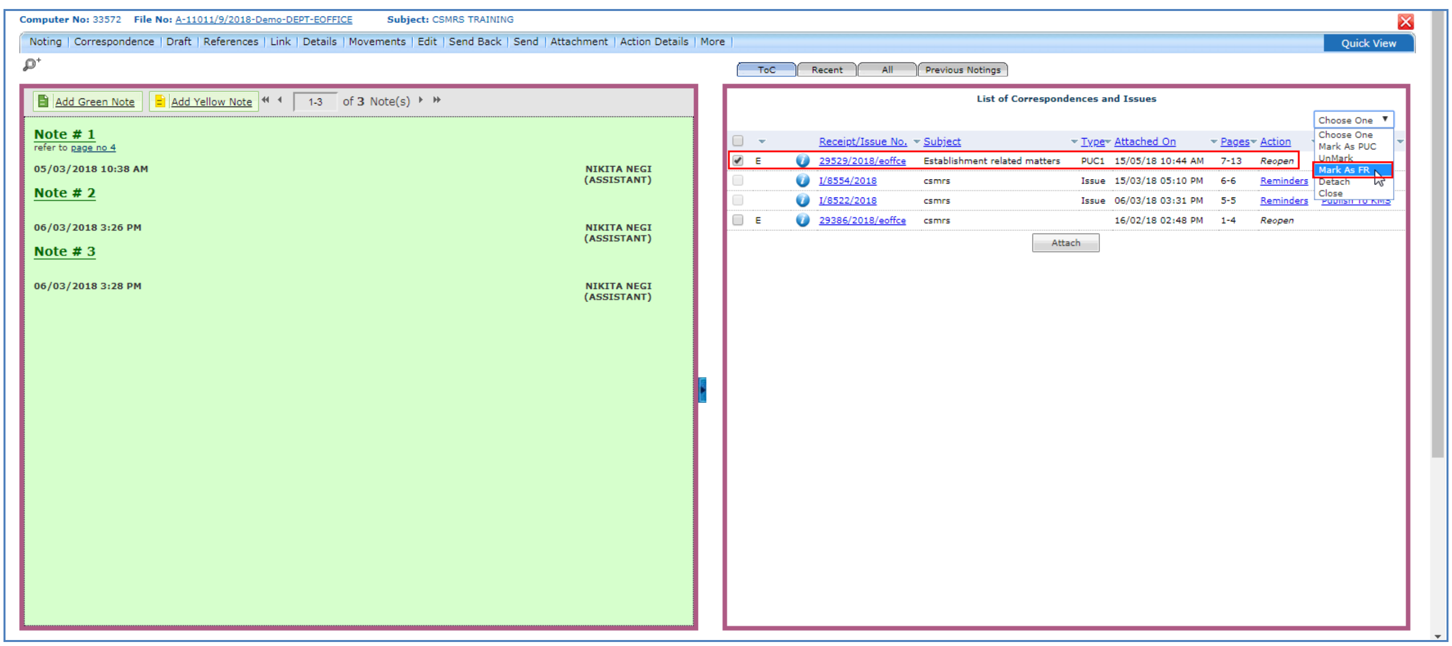


Fig.128

- Then, select the **PUC Number** from the dropdown menu as shown in **Fig.129:**

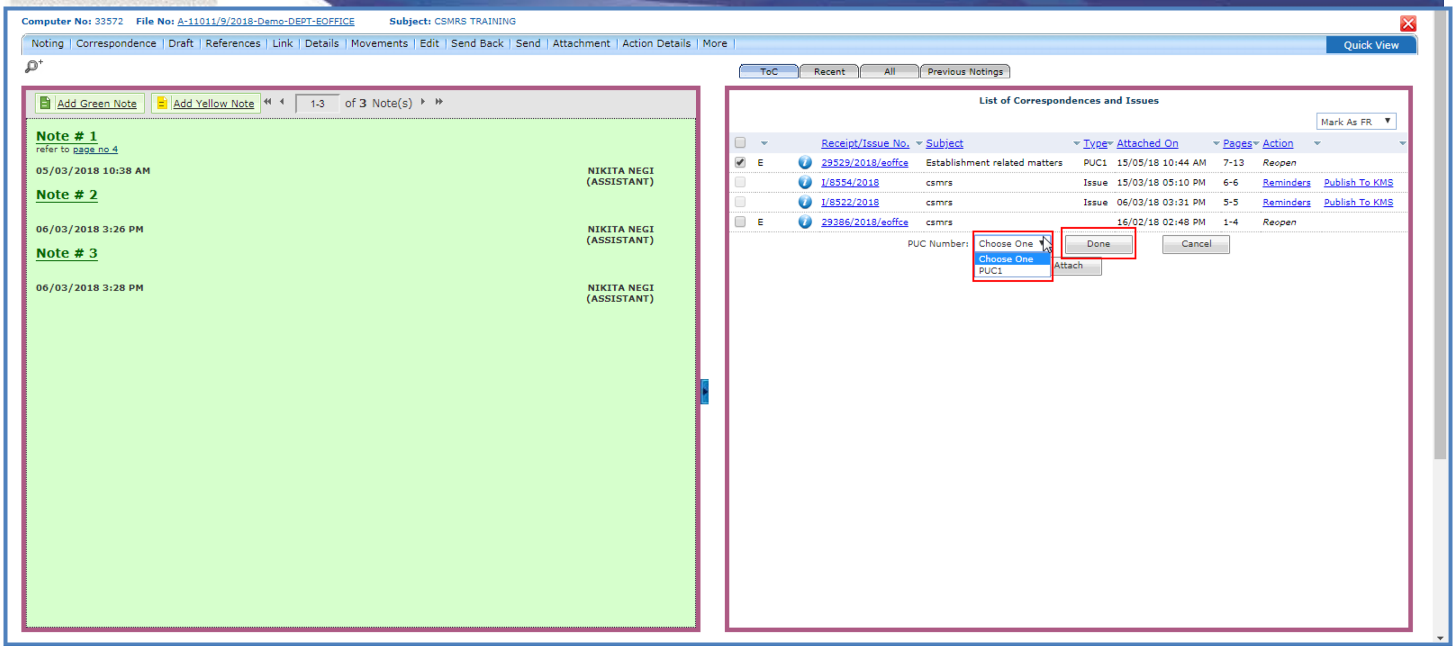


Fig.129

- Click the Done button. The receipt gets marked as FR.

d) **Detach**: This option helps the user to Delete/Detach the attached receipt from List of Correspondences and issues. Receipt can be detached before the movement of electronic file.

To detach a receipt, perform following steps:

- Select the receipt from the **List of Correspondences and Issues** and click **Detach** link from the dropdown menu as shown in **Fig.130**:

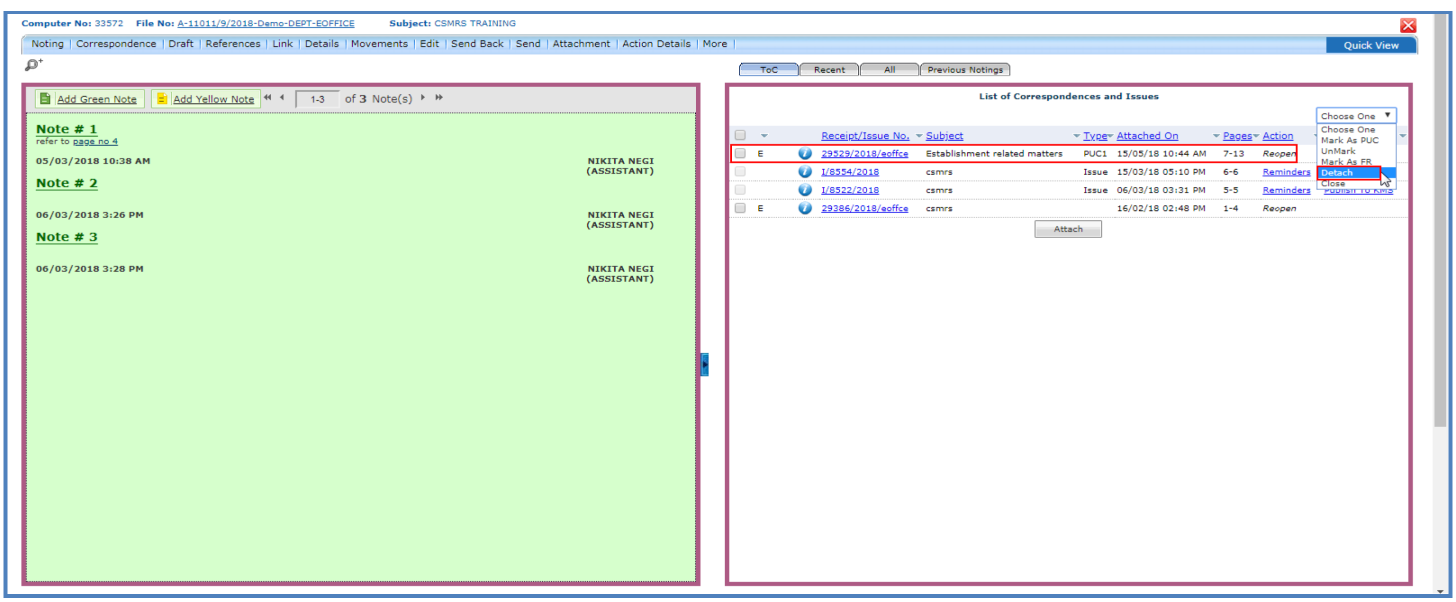


Fig.130

e) **Close**: This option helps the user to close the attached receipt from TOC of Correspondences.

To close a receipt, perform following steps:

- Select the receipt from the **List of Correspondences and Issues** and click **Close** link from the dropdown menu, as shown in **Fig.131**:

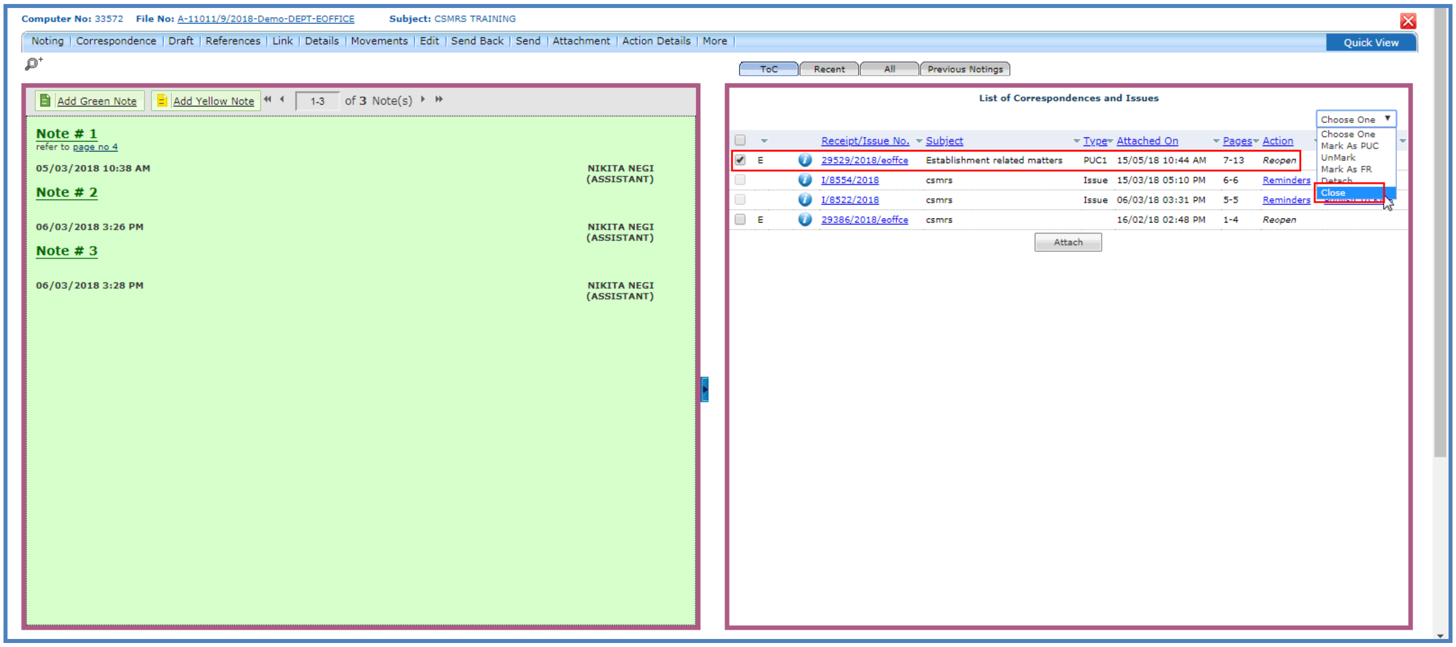


Fig.131

- The **Close Confirmation box** appears, enter the **Remarks** and click OK button as shown in **Fig.132**:

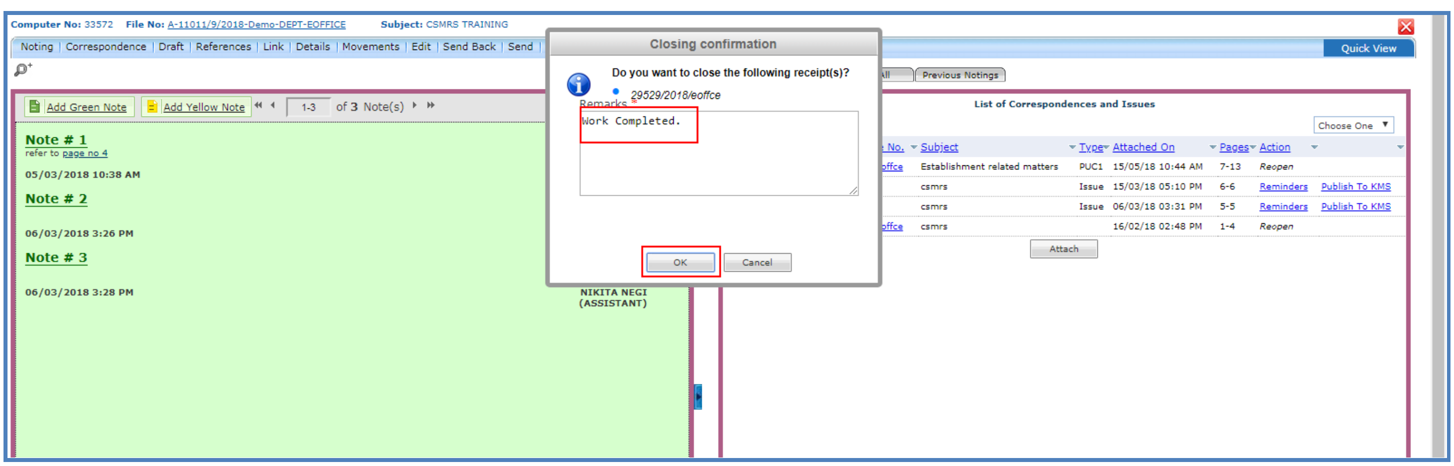


Fig.132

- The selected receipt gets closed.
- The Re-open link against closed receipt becomes active.

3. **Draft**: It is a process of creating an official reply to the concerned user/department/ministry conveying the views or orders of the department. With the help of this feature user can **Create New Draft** and **View Existing Drafts** in the File.

   To create a new draft, perform following steps:

   - Scroll mouse over Draft tab and click the **Create New Draft** link, as shown in **Fig.133**:

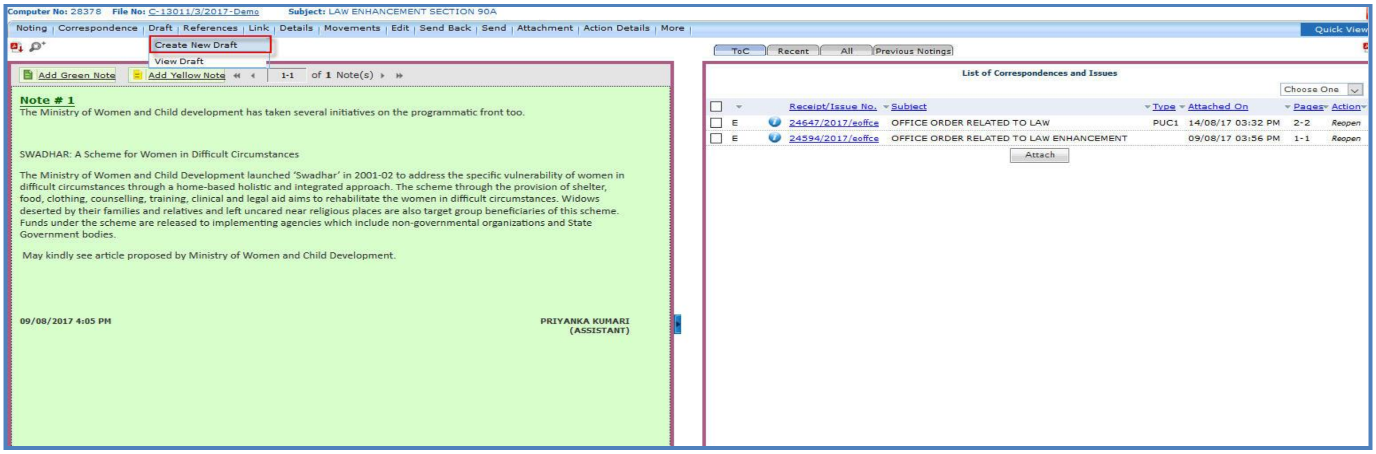


Fig.133

   - The **Create New Draft** screen appears, as shown in **Fig.134**:

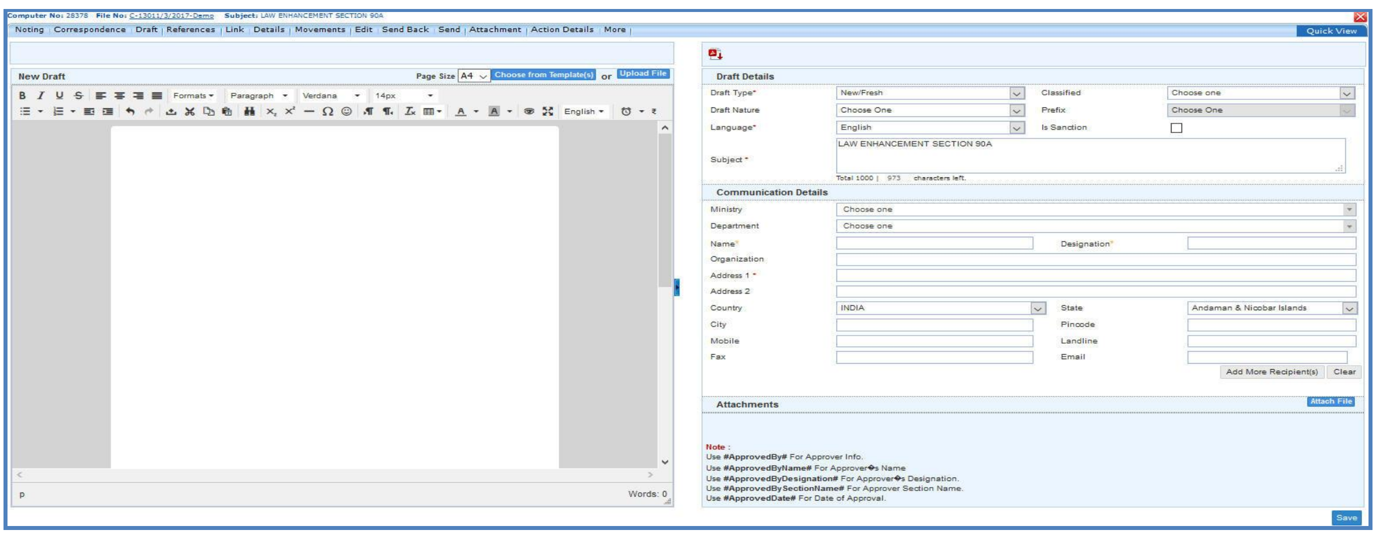


Fig.134

- Type the draft content manually or copy the content from already created word/ text files and paste it or choose a pre-defined template by clicking Choose from Template(s) button or Upload File button, as shown in **Fig.135**:

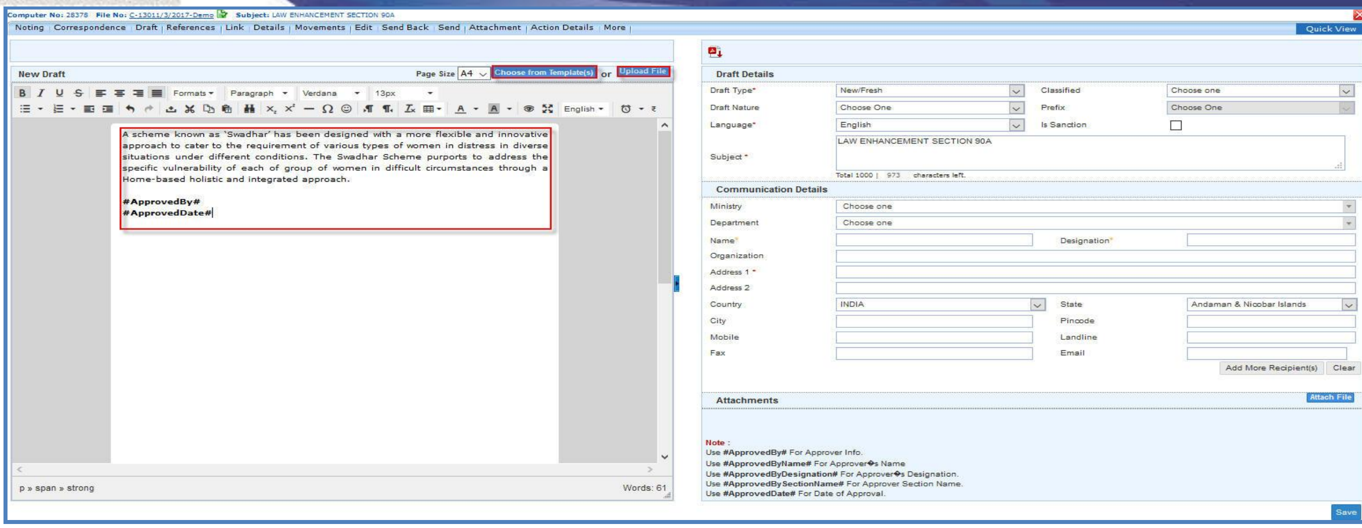


Fig.135

- After creating the DFA, select Draft Type, enter all the necessary details and DFA #Tags (if required) and click  button, as shown in **Fig.136**:

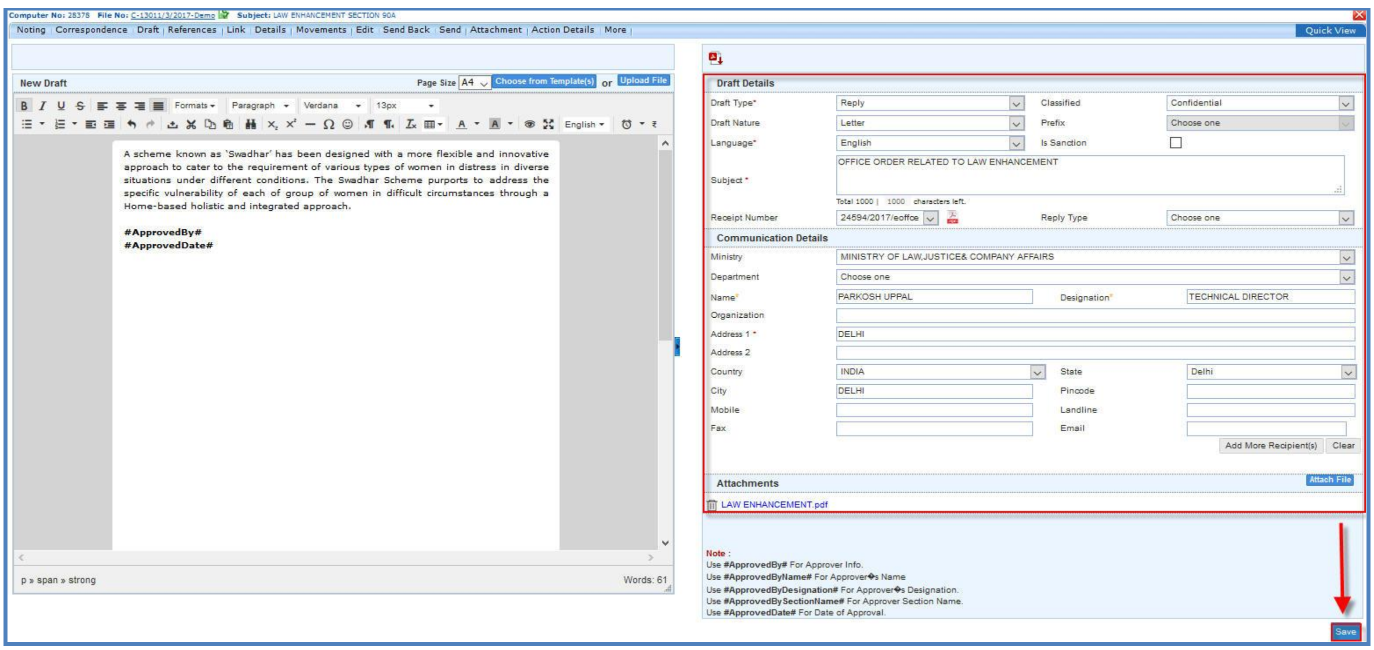


Fig.136

Note:

DFA # Tags will not work on uploaded DFA

- A unique **Draft Number** is assigned to the draft, as shown in **Fig.137**:

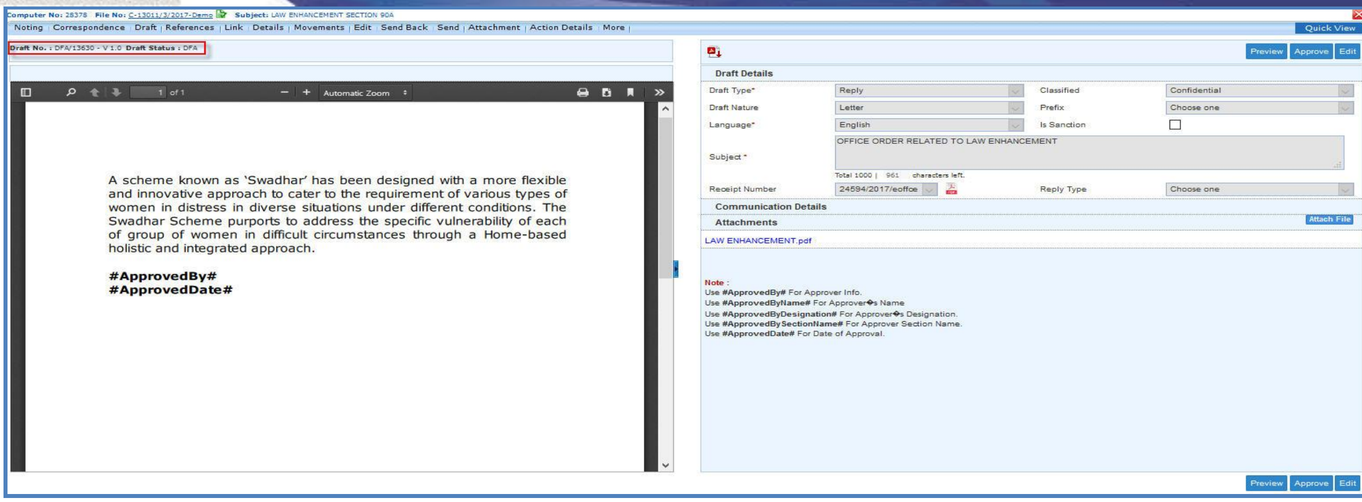


Fig.137

- A newly created draft has three buttons:

  a) **Preview**: View the DFA before sending.

  b) **Approve**: To finalise the DFA. Once the draft is approved no further changes in the content can be done.

  c) **Edit**: To make the necessary changes in DFA. Each editing of the draft will create a new version of the draft once the file along with the draft is moved to the next user.

Note:

The Approve button is visible only to users having role of Draft Approver.

- Once Approve button is clicked, an approval confirmation popup appears. Click OK button, as shown in **Fig.138**:

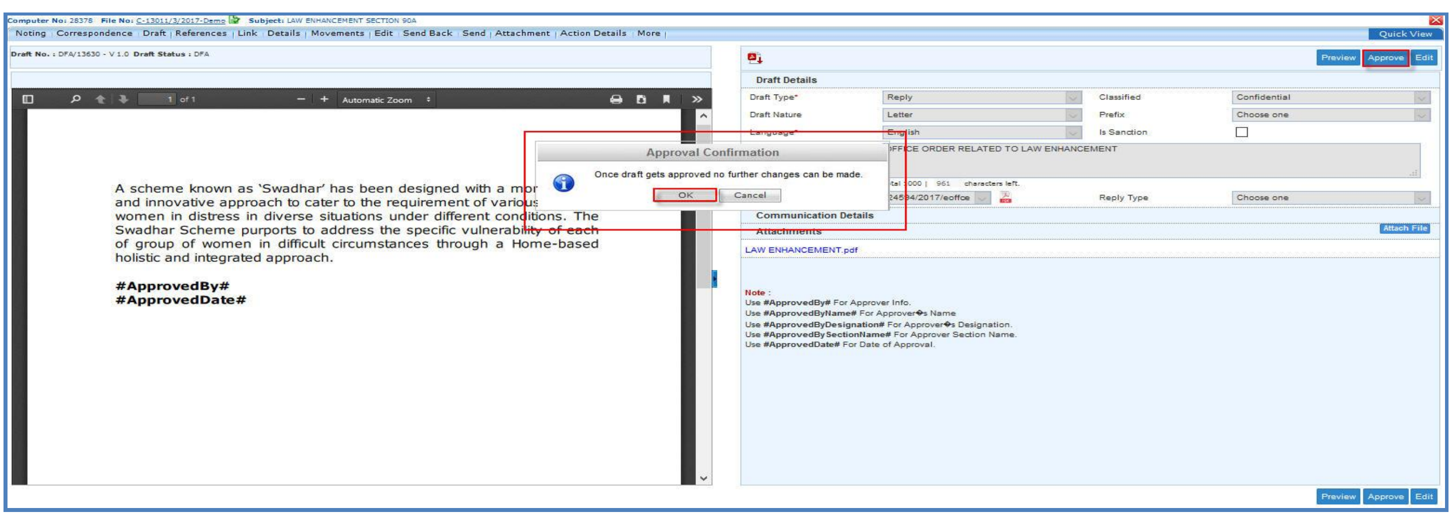


Fig.138

- The DFA gets approved and DFA # Tags changed into relevant information, as shown in **Fig.139**:

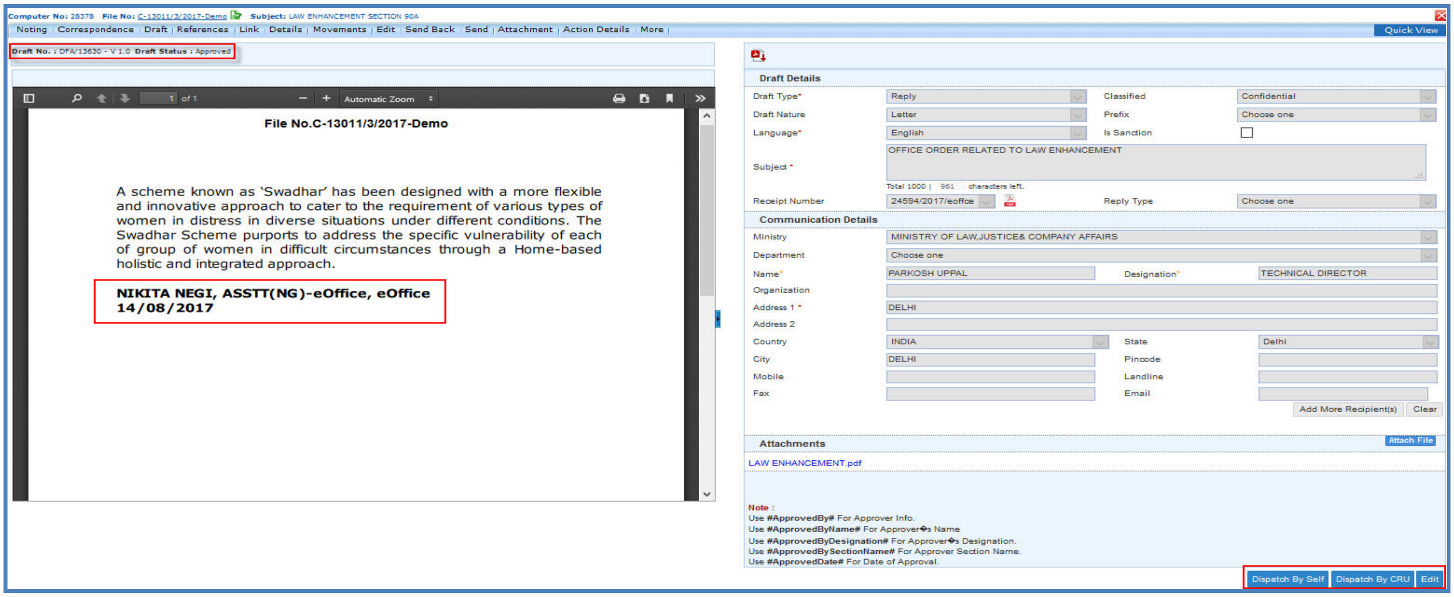


Fig.139

- After approving of the draft the actions available are shown in **Fig.140**:

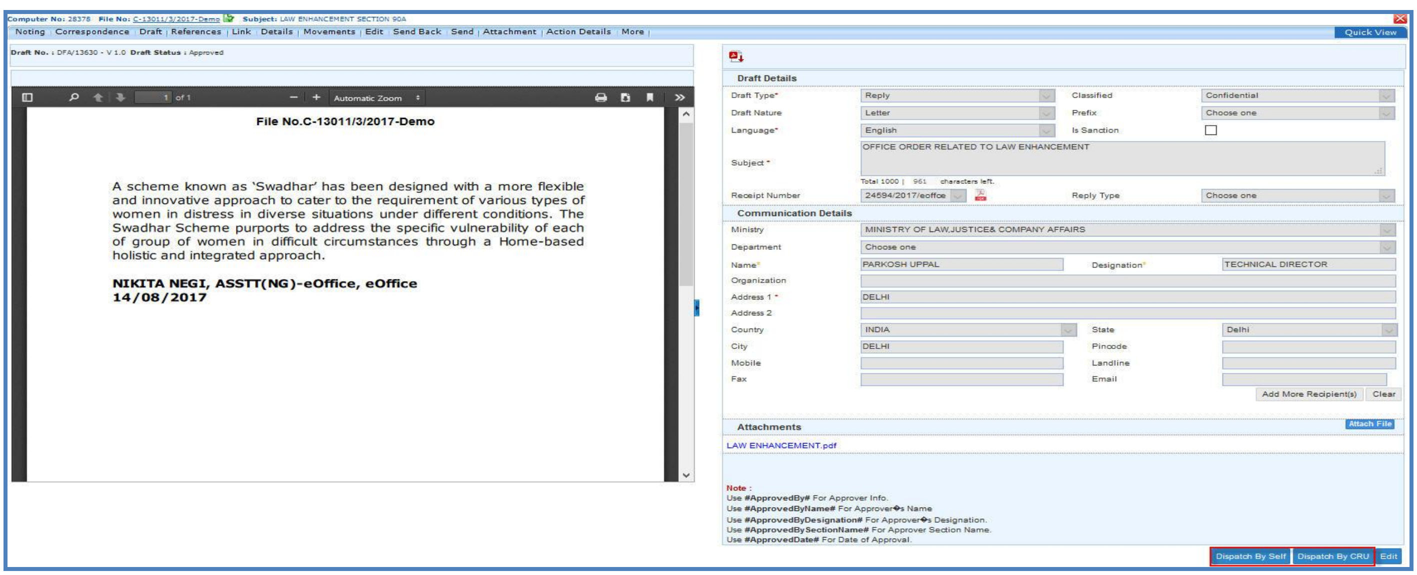


Fig.140

Note:

For more detail refer the button mentioned under Dispatch action tab of Browse & Diarise sub-module. .

To view existing draft, perform following steps:

- Scroll mouse over Draft tab and click the **View Draft** link , as shown in **Fig.141**:

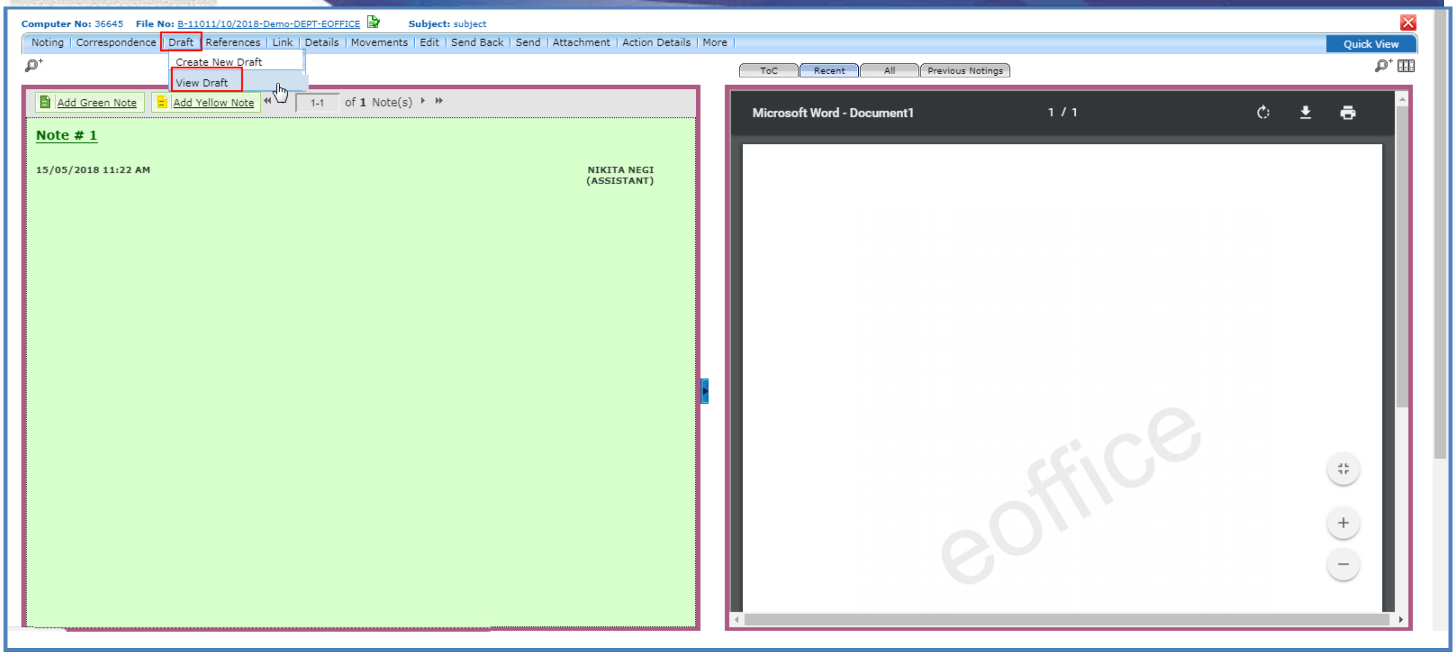


Fig.141

- Click **Draft No.** to open the draft as shown in **Fig.142**:

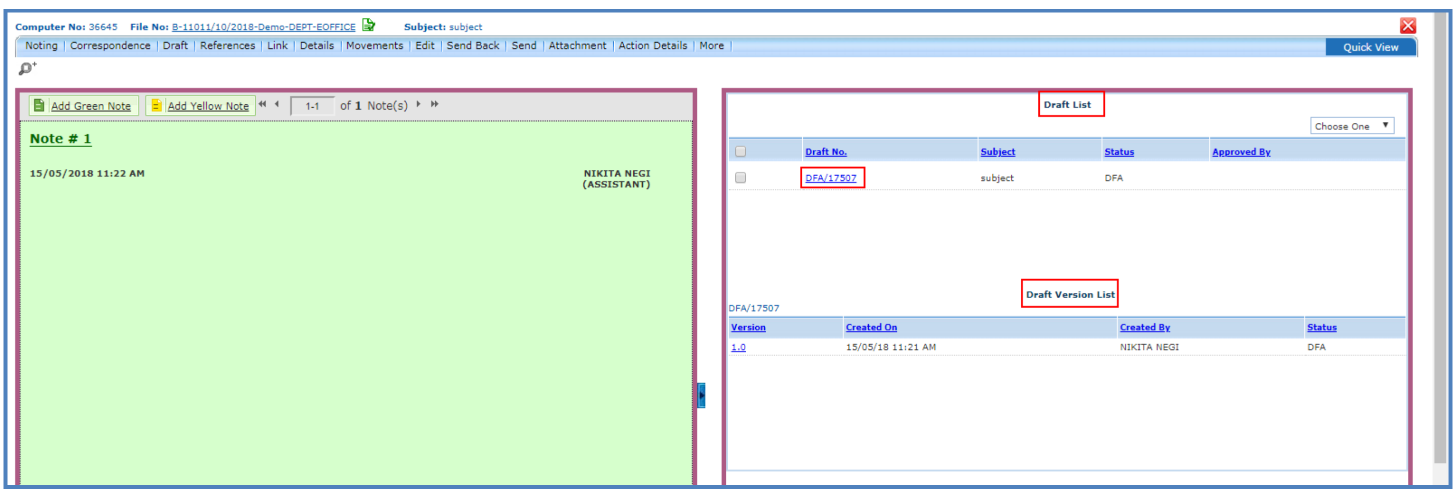


Fig.142

- The draft is shown in **Fig.143:**

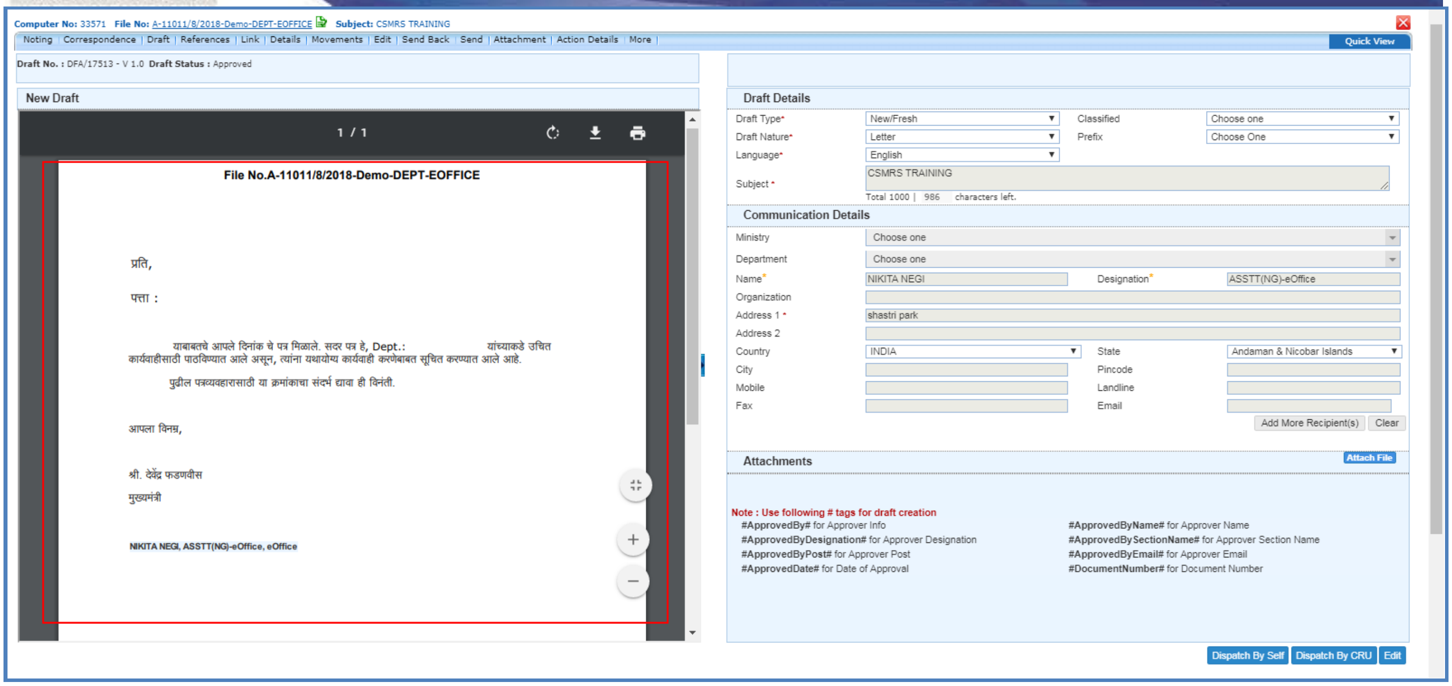
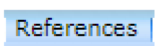


Fig.143

4. **Reference**: These are document to support noting. It is used to attach references corresponding to the working file.

   To attach Reference, perform following steps:

   - Scroll mouse over 

 tab and click **Local Reference** link, as shown in **Fig.144**:

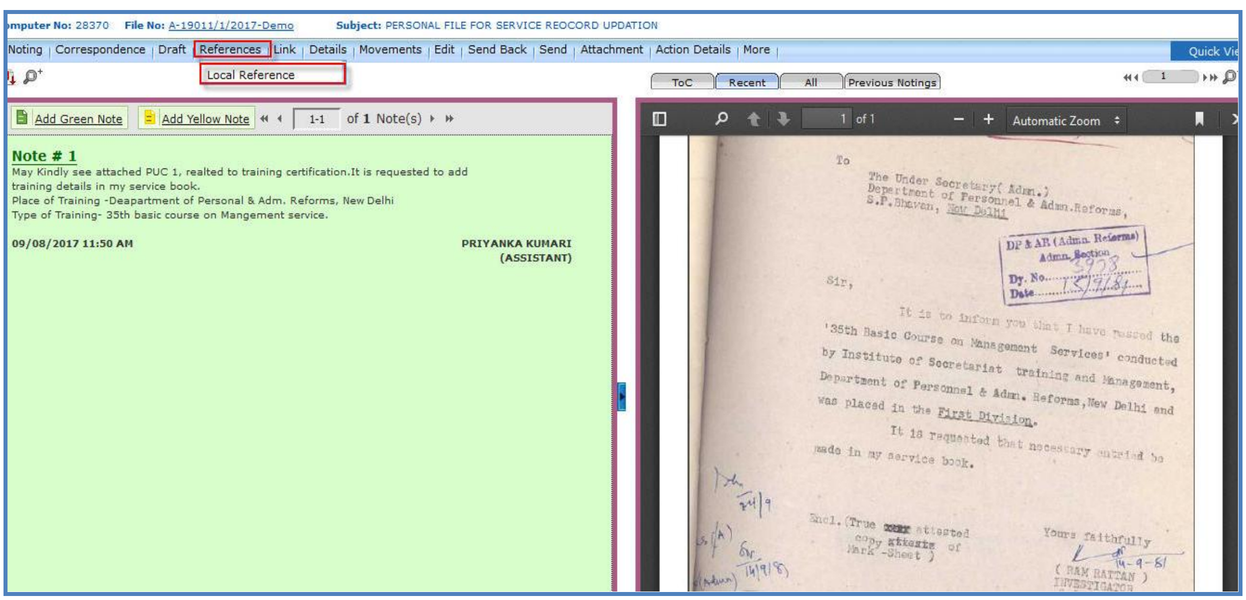


Fig.144

- The **References** screen appears on right side of noting page. Click **Upload File** button or **Upload From KMS** button **Fig.145**:

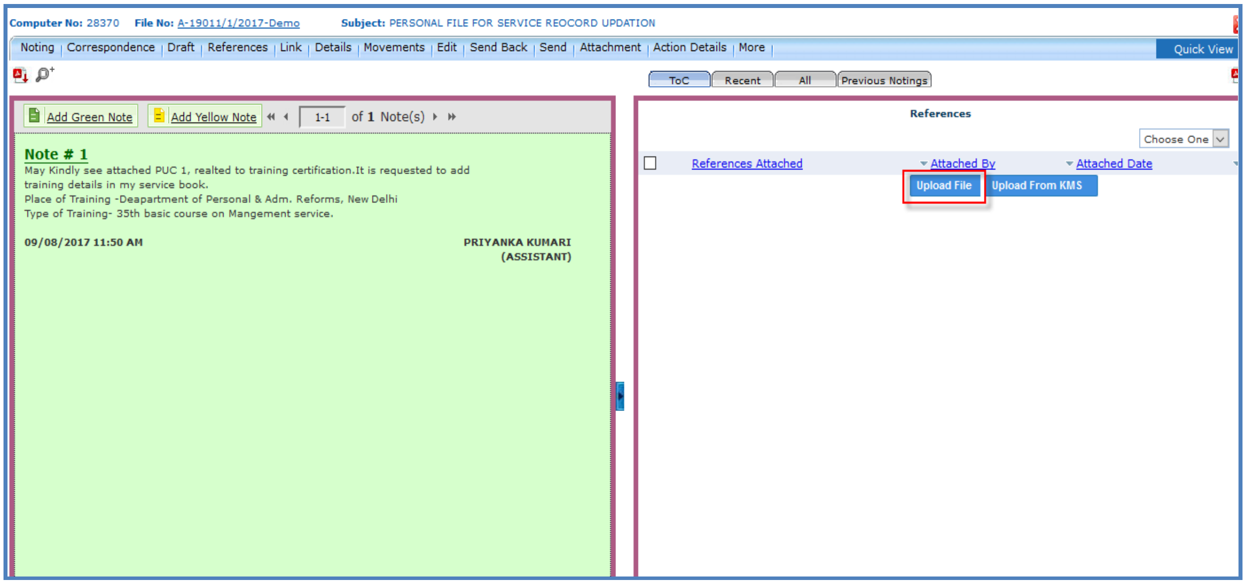


Fig.145

- **Upload File**: Browse the reference document from the system and click the **Open** button, as shown in **Fig.146**:

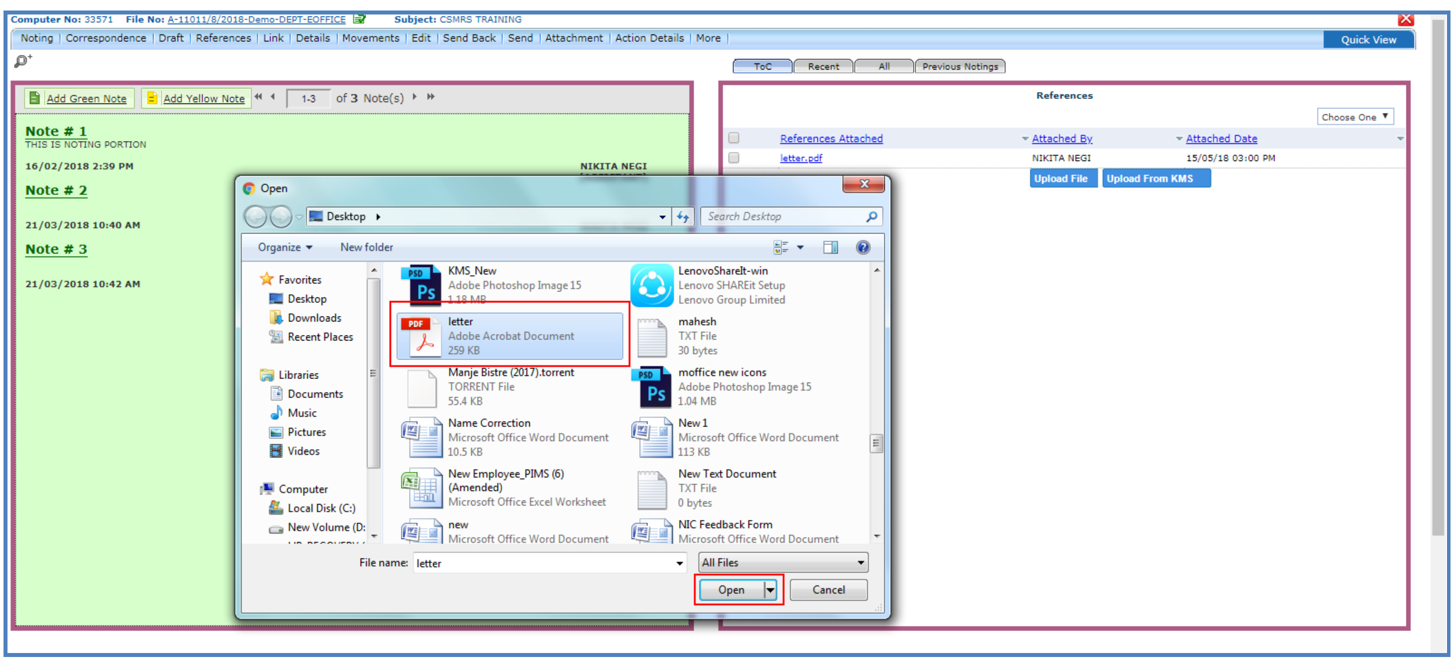


Fig.146

OR

- **Upload From KMS**: The KMS reference(s) screen appears select the document and click **Attach** button.

- Import KMS Document pop-up appears, click Import button, as shown in **Fig.147:**

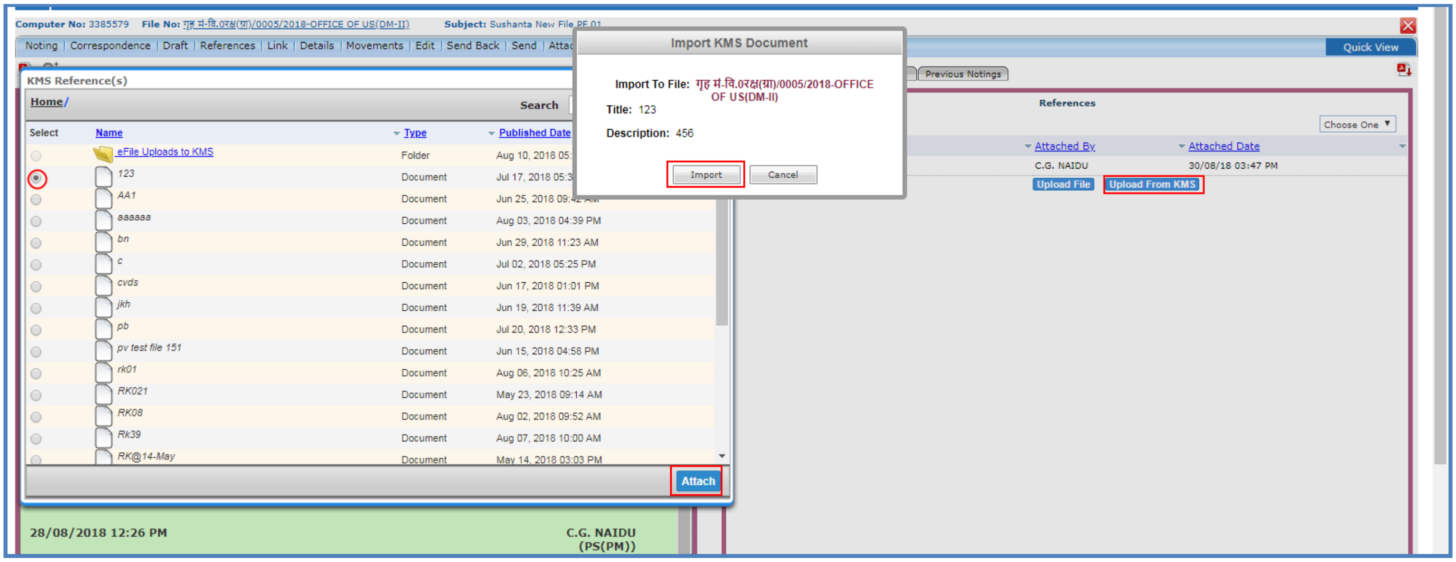


Fig.147

- The reference document gets attached with the working file.

- To **delete** the attached reference document, select document and click **Delete** link from drop down menu as shown in **Fig.148**:

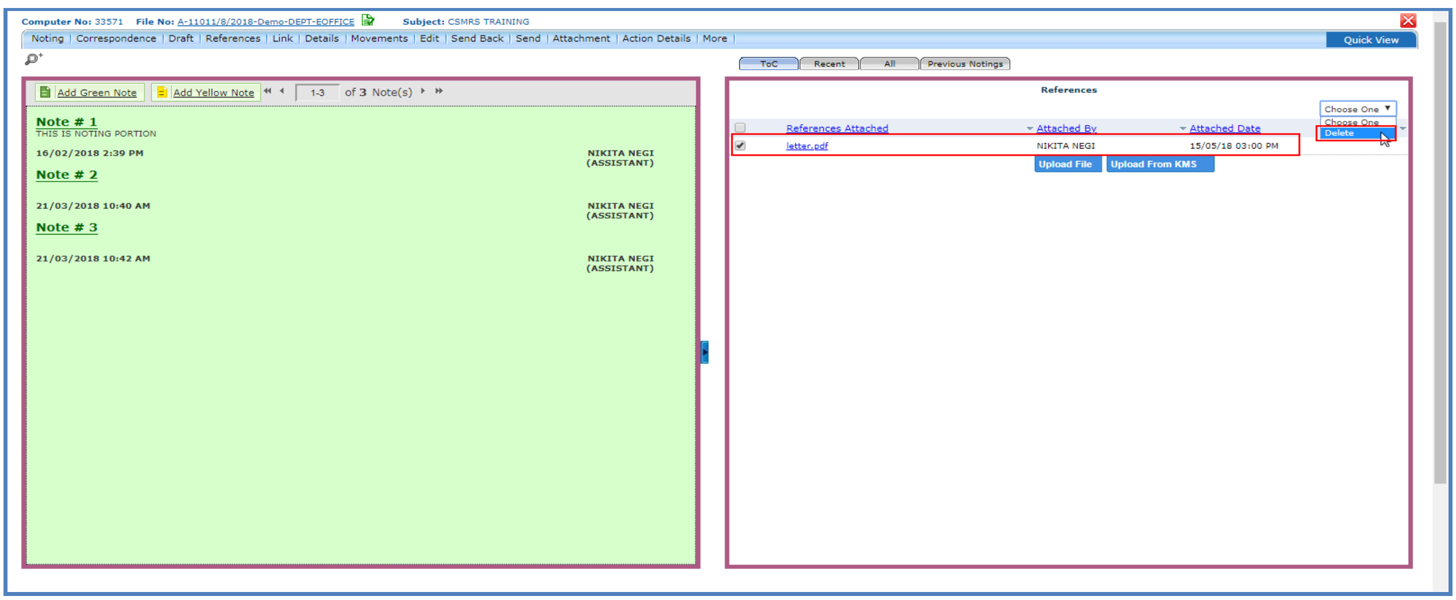


Fig.148

Note:

After the file movement, the Local Reference cannot be deleted.

5. **Link**: It is used to refer another active file (Created/ Inbox sub-module) along with working file. The copy of the link file will have all the content of the linked file, upto the moment of linking.

It contains 3 sub links as shown in **Fig.149**:

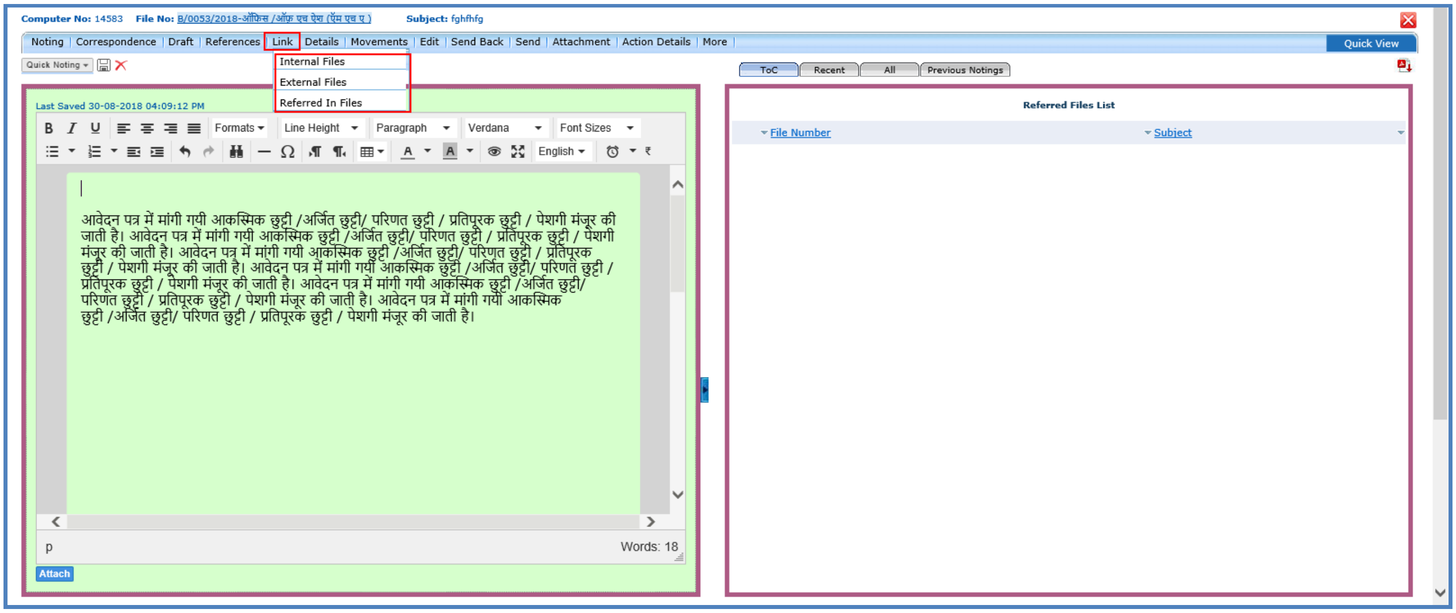


Fig.149

a) **Internal Files**: It is used to link/delink any other file from within the Department.

b) **External Files**: It is used to link/delink any file from other Department.

c) **Referred In Files**: It shows the list of file(s) in which this working file is linked.

To link with other File, perform the following steps:

- Move the cursor on Link tab, and click the Internal Files link, as shown in **Fig.150**:

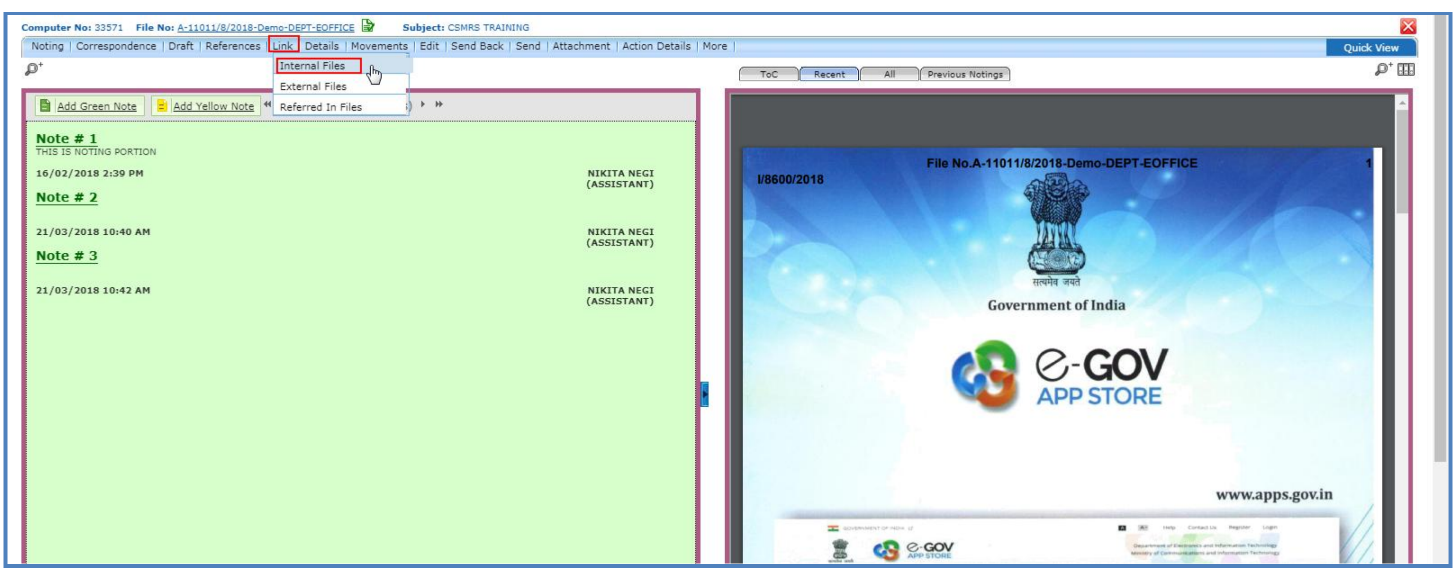


Fig.150

- The **Link/Delink** screen appears on right side, click the Attach button, as shown in **Fig.151**:

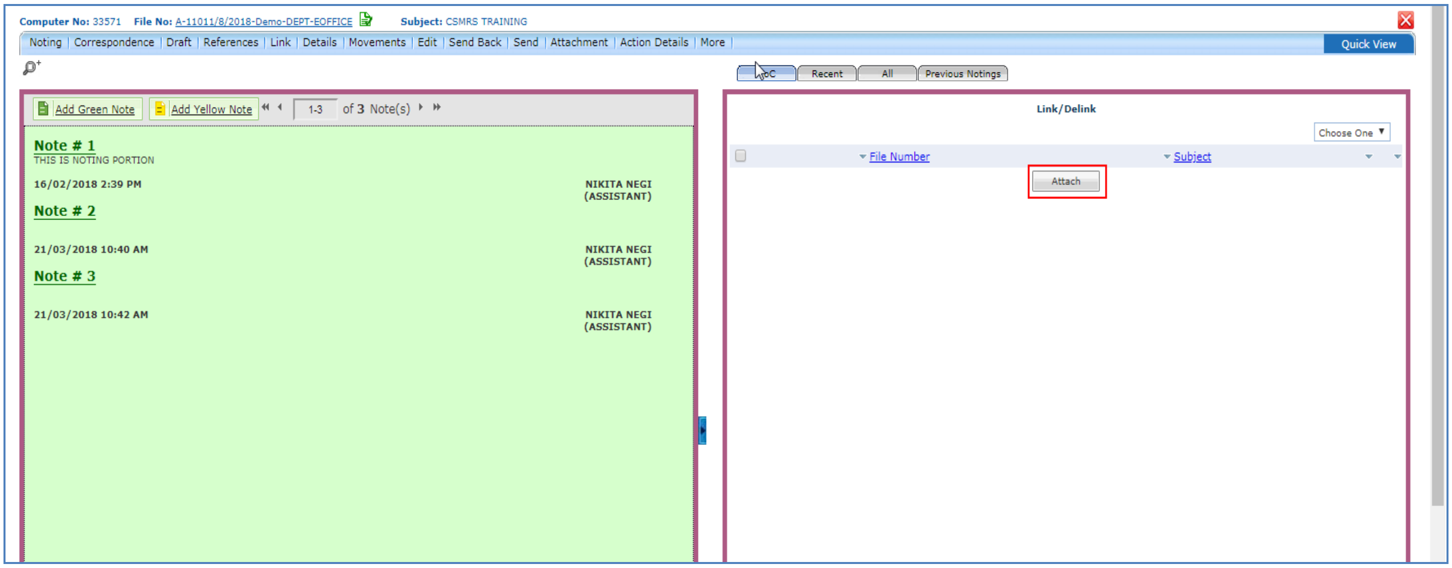


Fig.151

- A list of files appears, select the file and click the Attach button as shown in **Fig.152**:

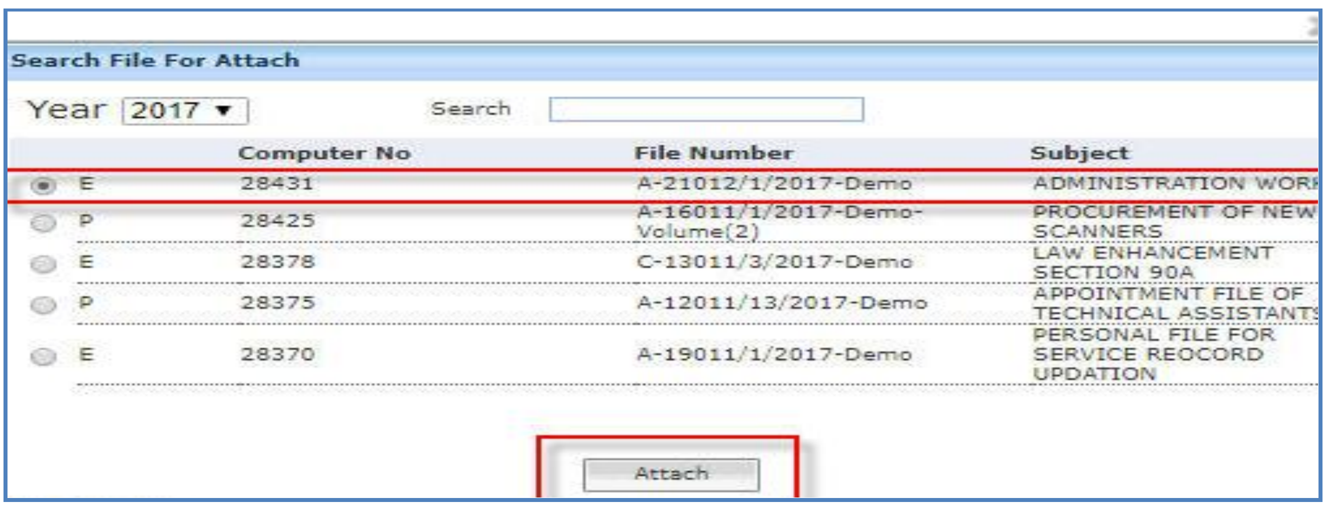


Fig.152

Note:

The list contains files which are present in 'Created (Completed)' or 'Inbox' section of File.

- The selected file gets linked with the working file, as shown in **Fig.153**:

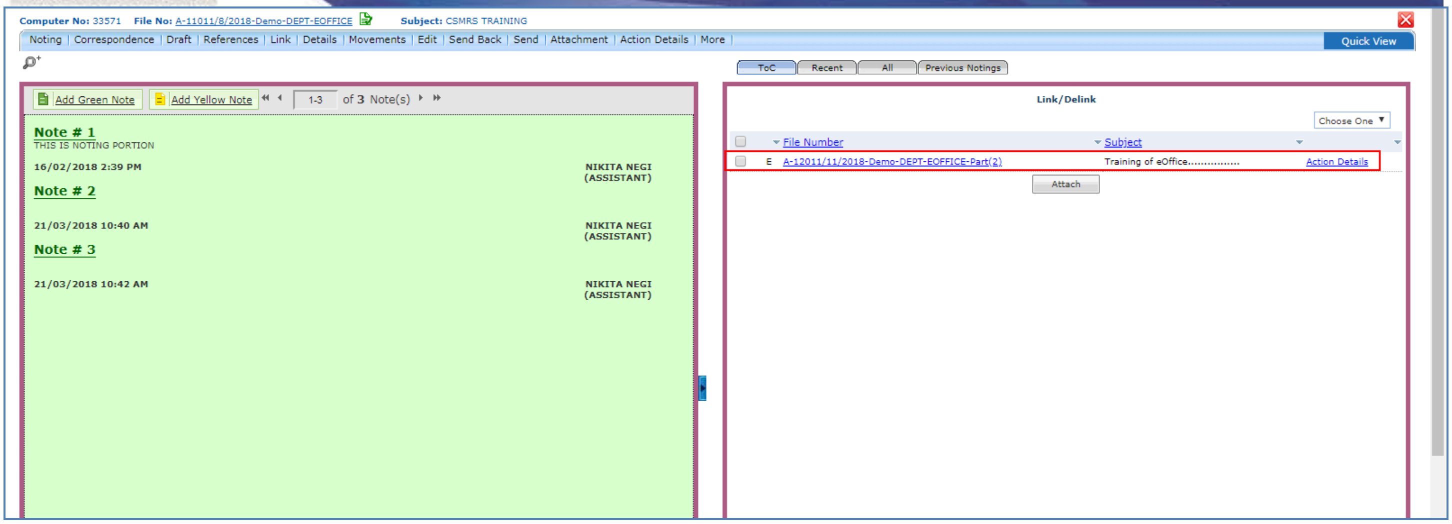


Fig.153

- The File can also be **delinked** from the dropdown menu available at the top of Link/Delink page.

To Delink a File, perform following steps:

- Select the File which needs to be delinked and click the Delink link from the dropdown menu, as shown in **Fig.154**:

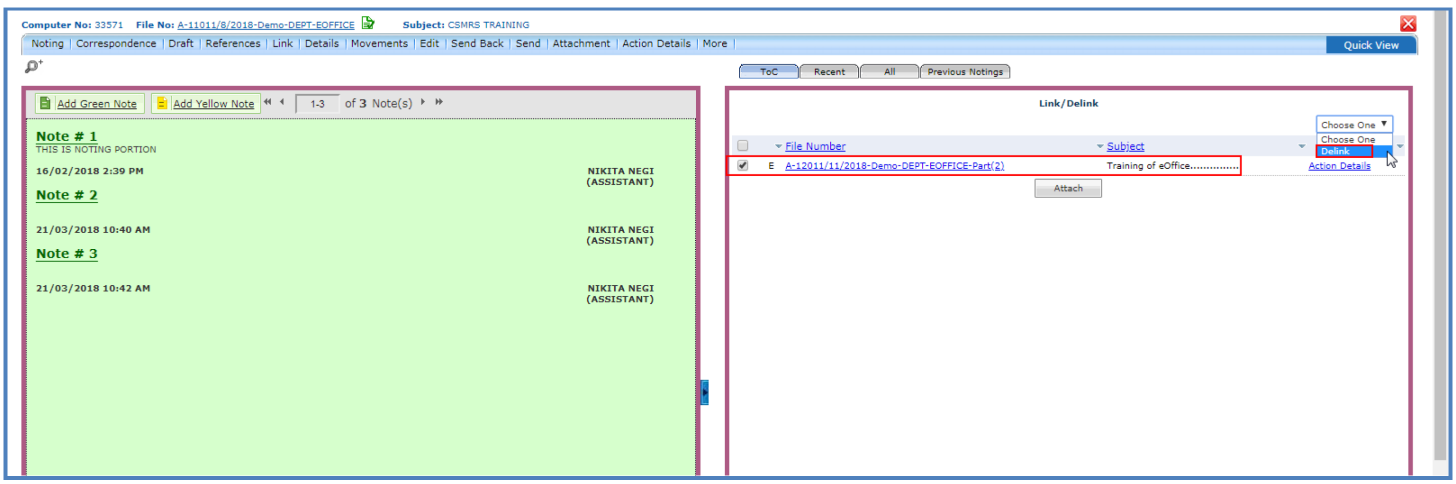


Fig.154

- The file is delinked.

Note:

The user(s) of same Organization Unit (OU) can delink the file.

6. **Details**: It can be used to view the details of a File i.e. File cover Page details and total no. of part Files created, as shown in **Fig.155**:

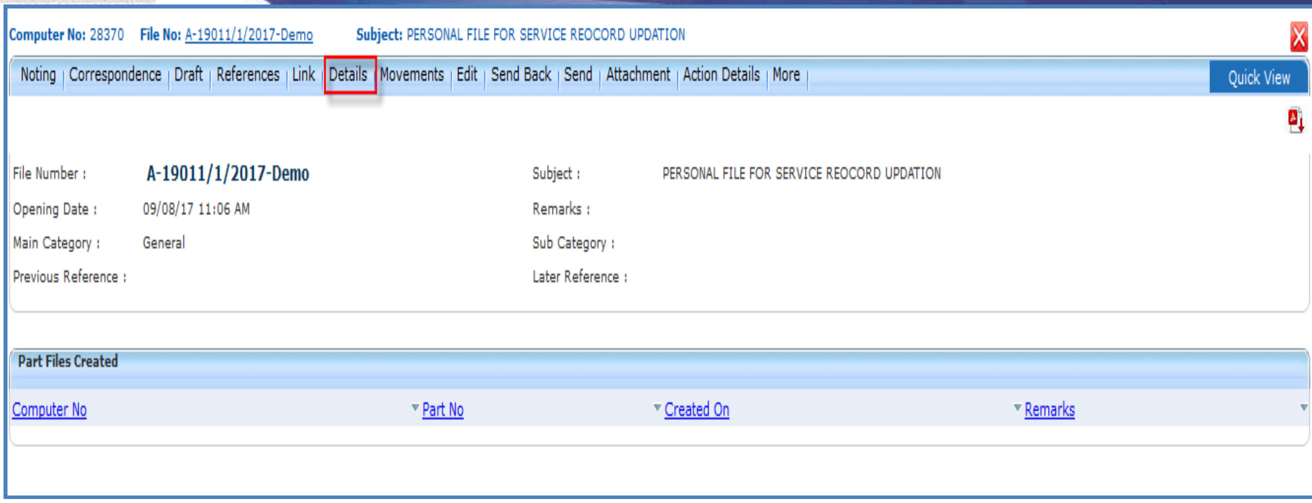


Fig.155

7. **Movements**: This option is used to track the **Movements** of the file which automatically gets updated as File moves from user to another as shown in **Fig.156**:

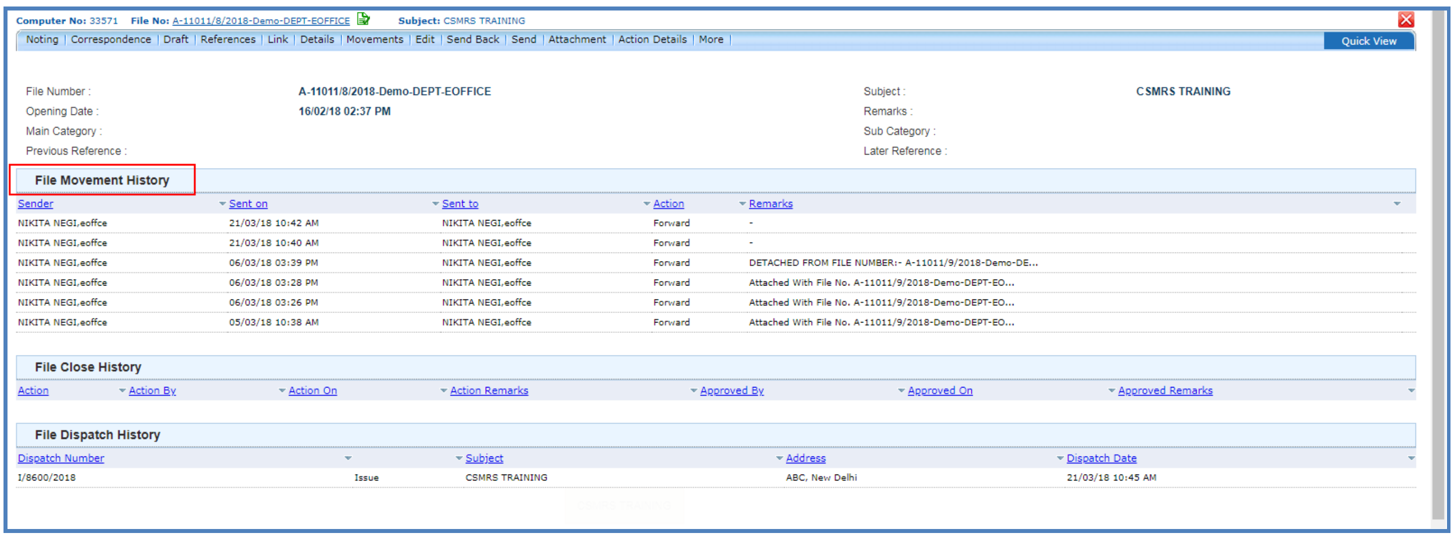


Fig.156

8. **Edit**: It can be used to make changes to the cover page of existing running file except the File Number.

   To edit the cover page, perform following steps:

   - Click Edit tab, as shown in **Fig.157**:

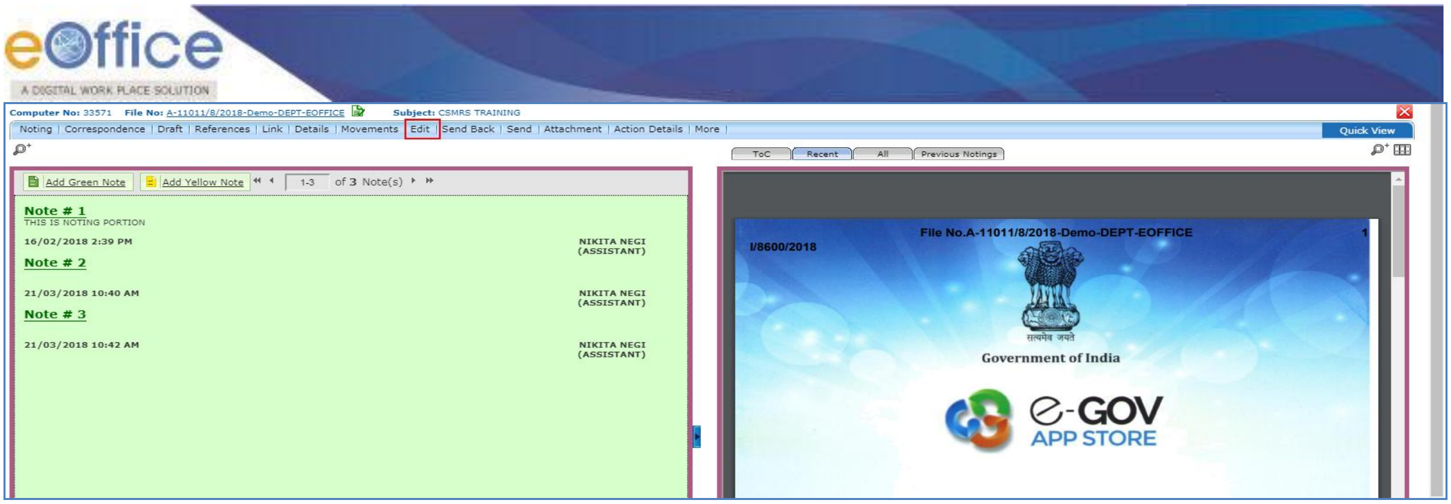


Fig.157

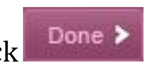
- The Cover Page of file appears, make required changes and click  button to save changes as shown in **Fig.158**:

Fig.158

Note:

Only employees of the OU (Section/ Division) in which file is created, can edit the details of the file cover, except the file number - which is non-editable.

9. **Send back**: It is used to send the file back to the sender of the File.

Note:

Refer to steps mentioned under Send action tab of File Inbox sub-module.

10. **Send**: This option facilitates the user to mark the file to the intended recipient(s).

Note:

Refer to steps mentioned under Send action tab of File Inbox sub-module.

11. **Attachment**: It is used to attach the File or Receipt on working File.

    To attach File/Receipt with the working file, perform following steps:

    - Scroll over the Attachment tab and select **File or Receipt** (as per the requirement), as shown in **Fig.159**:

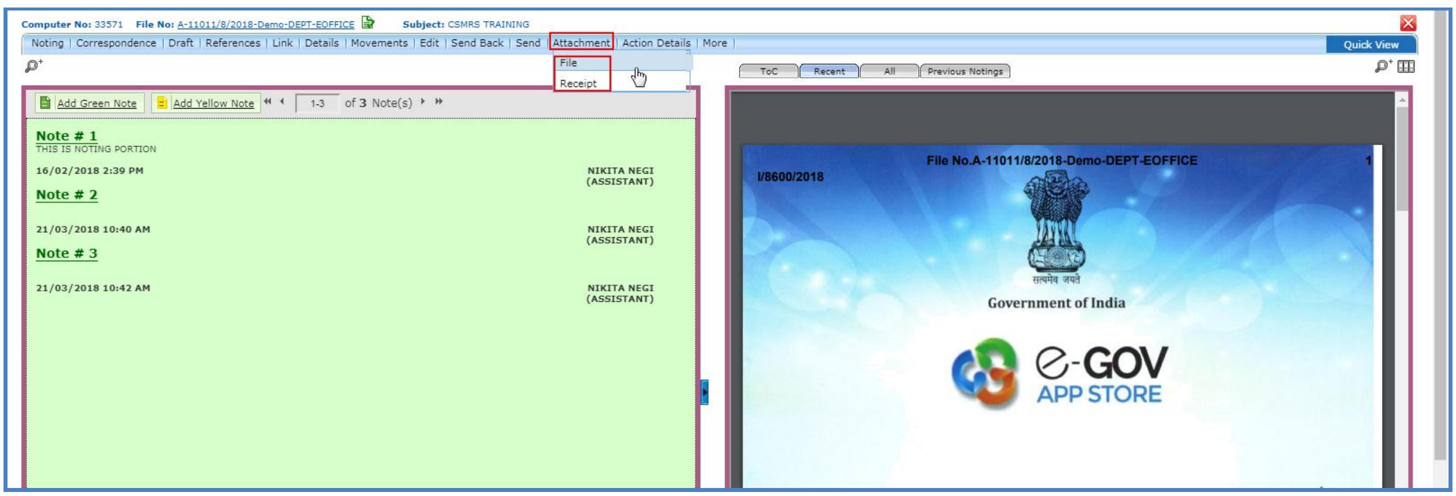


Fig.159

- On selecting File link, Attached / Detached File(s) list screen appears.
- Click Attach File button as shown in **Fig.160**:

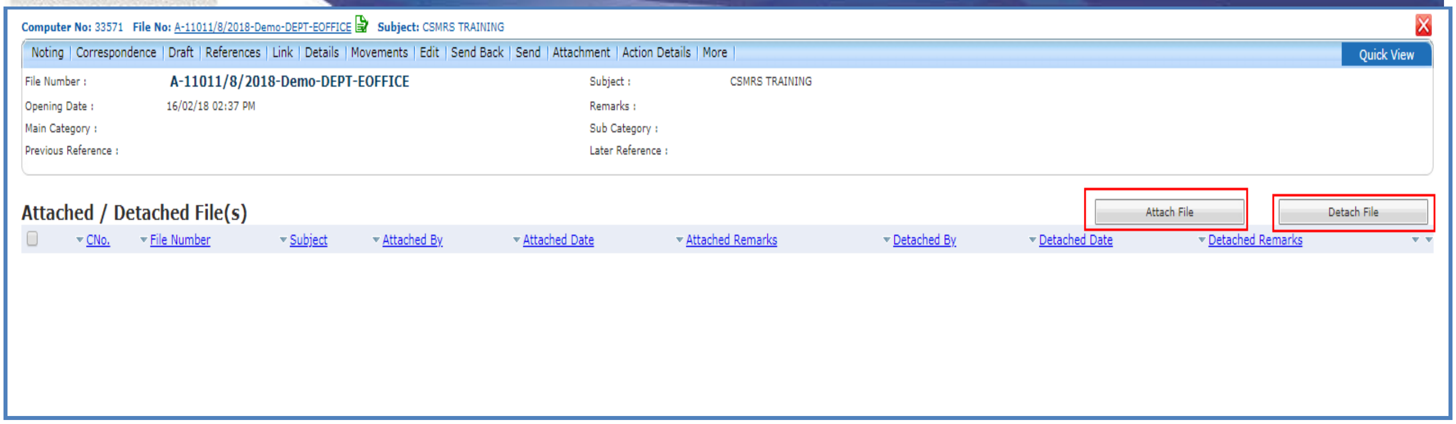


Fig.160

- A list of files is appears select the file and click Attach button as shown in **Fig.161:**

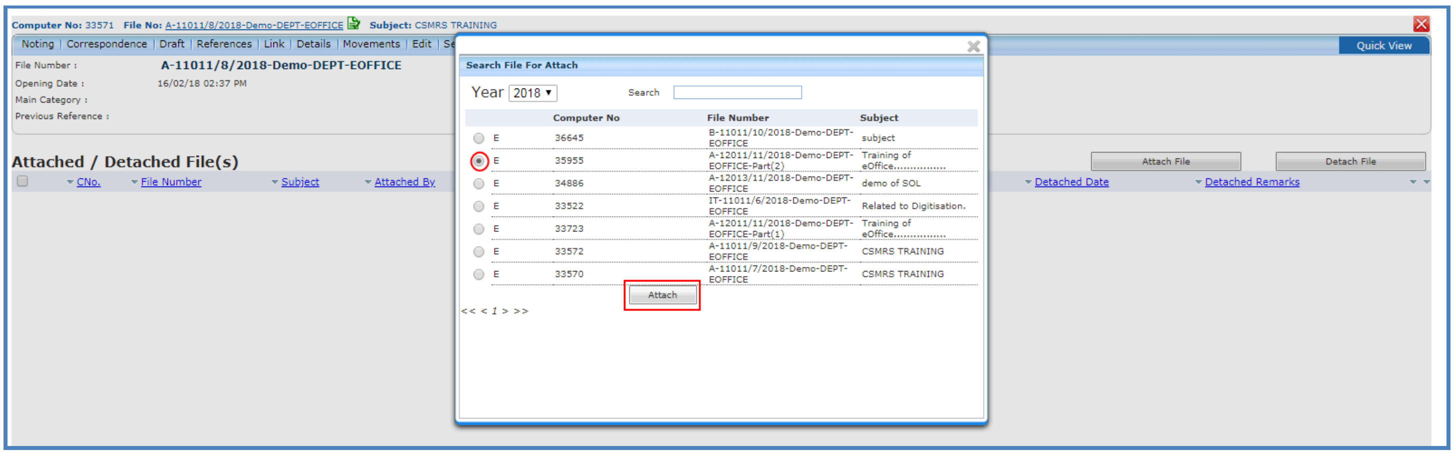


Fig.161

Note:

The list contains files which are present in 'Created (Completed)' or 'Inbox' section of File.

- The **Attach File Alert** window appea**r,** enter the **Remarks** and **click** OK button as shown in **Fig.162**:

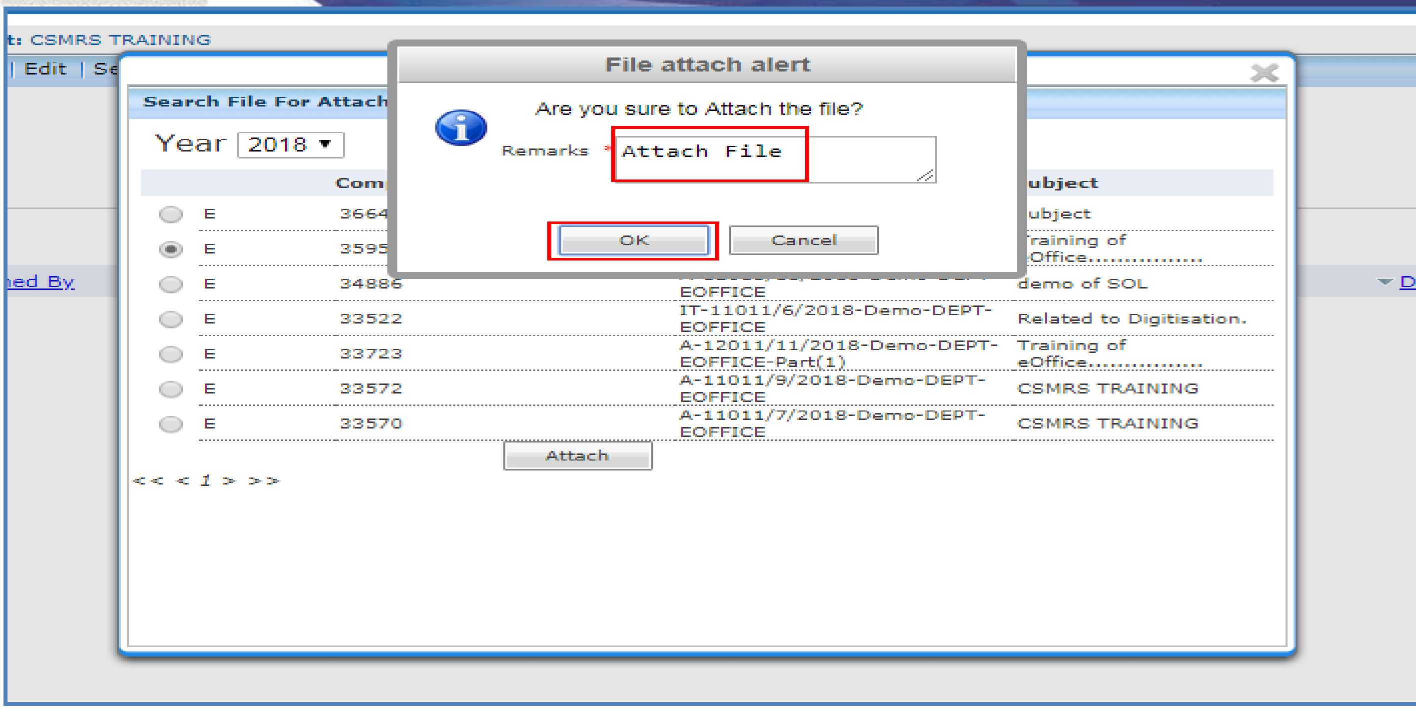


Fig.162

- The file gets attached with the working file along with the 'Attached Remarks', as shown in **Fig.163**:

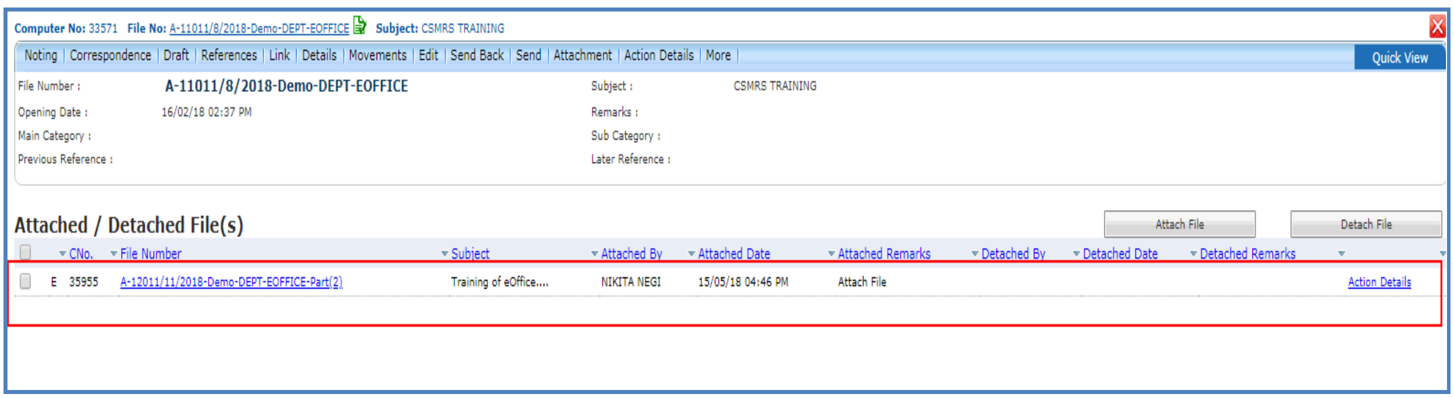


Fig.163

To Detach File with the working file, perform following steps:

- Select the File from the Attached/Detached File(s) screen and click  button, as shown in **Fig.164**:

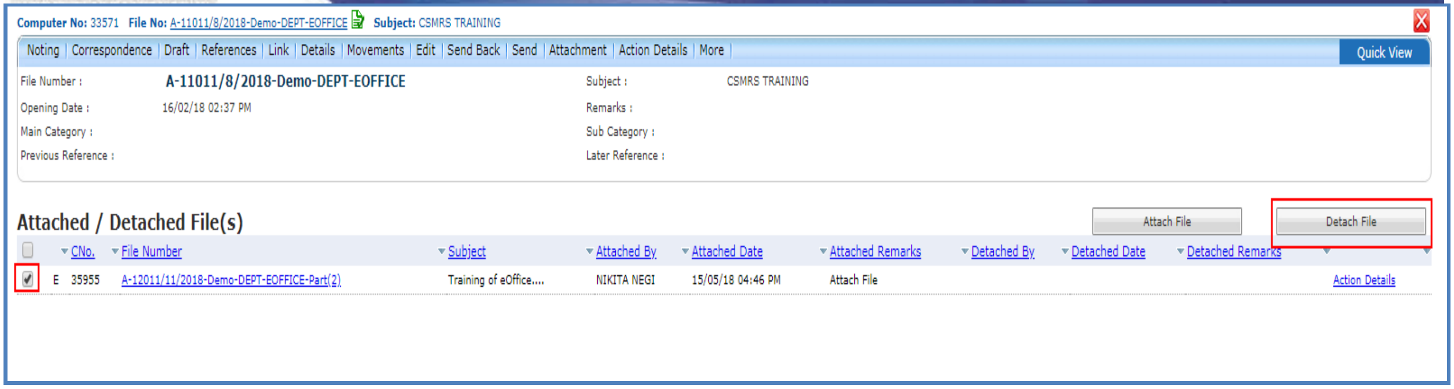


Fig.164

- The **File Detach alert** window appears, enter the **Remarks** and click  button, as shown in **Fig.165**:

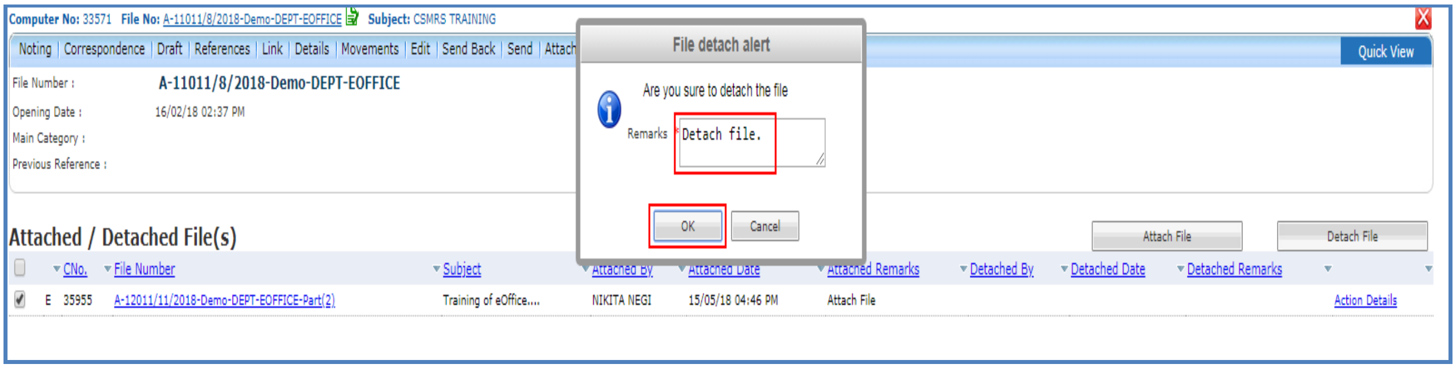


Fig.165

- The file gets detached from the working file along with the 'Detached Remarks' as shown in **Fig.166**:

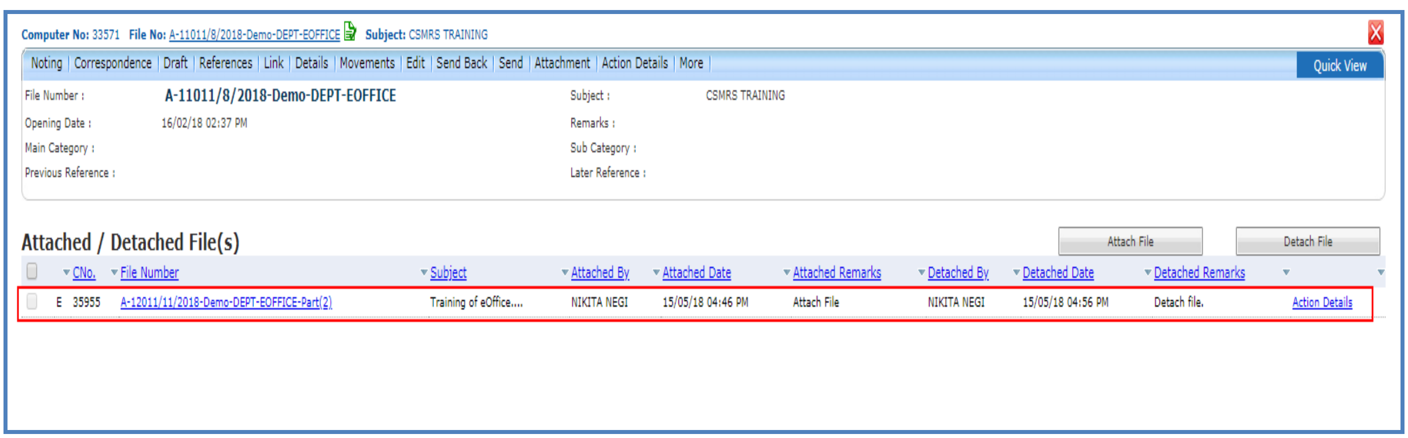


Fig.166

Note:

Attachment/ detachment of receipt with working file are similar as attachment/ detachment of file with working file.

12. **Action Details**: To view or add remarks.

- Click Action Details button, then click Add Comment button, as shown in **Fig.167**:

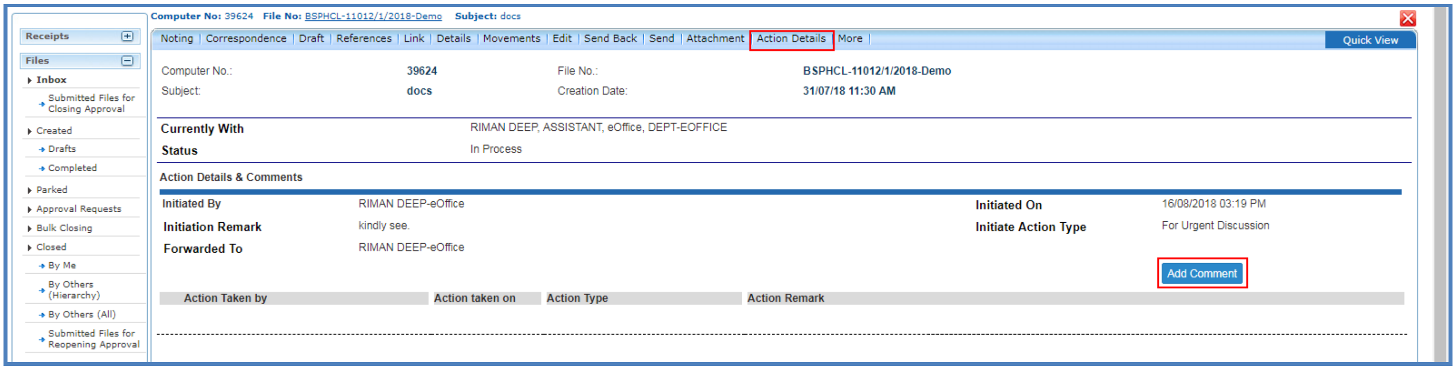


Fig.167

Note:

The feature is for File(s) against which the action has initiated.

Refer to Viewing & Adding the action comment mentioned under Initiated action sub-module of File module.

13. **More**: It is used to close and Park the active file, check closing/parking history and merge details.

   a) **Close File**: It is used to **Close** the active File and to view the history of Closed File.

Note:

Closing option appears in the file for a user who either have rights to close the file or the file belong to his/ her OU.

While initiating the process of closing a file, the file stays with the user, only the request with remarks for closing the file goes to the Approving Authority.

The setting of roles (Closing and Approver) will be done through an interface by the eOffice Administrator in the Admin application.

- Reopening of the files will follow the same work flow process as for closing the files.

To close a particular File, perform the following steps:

- Scroll over More... tab →**Close File** link→**Send for Approval** sub-link from the action menu as shown in **Fig.168**:

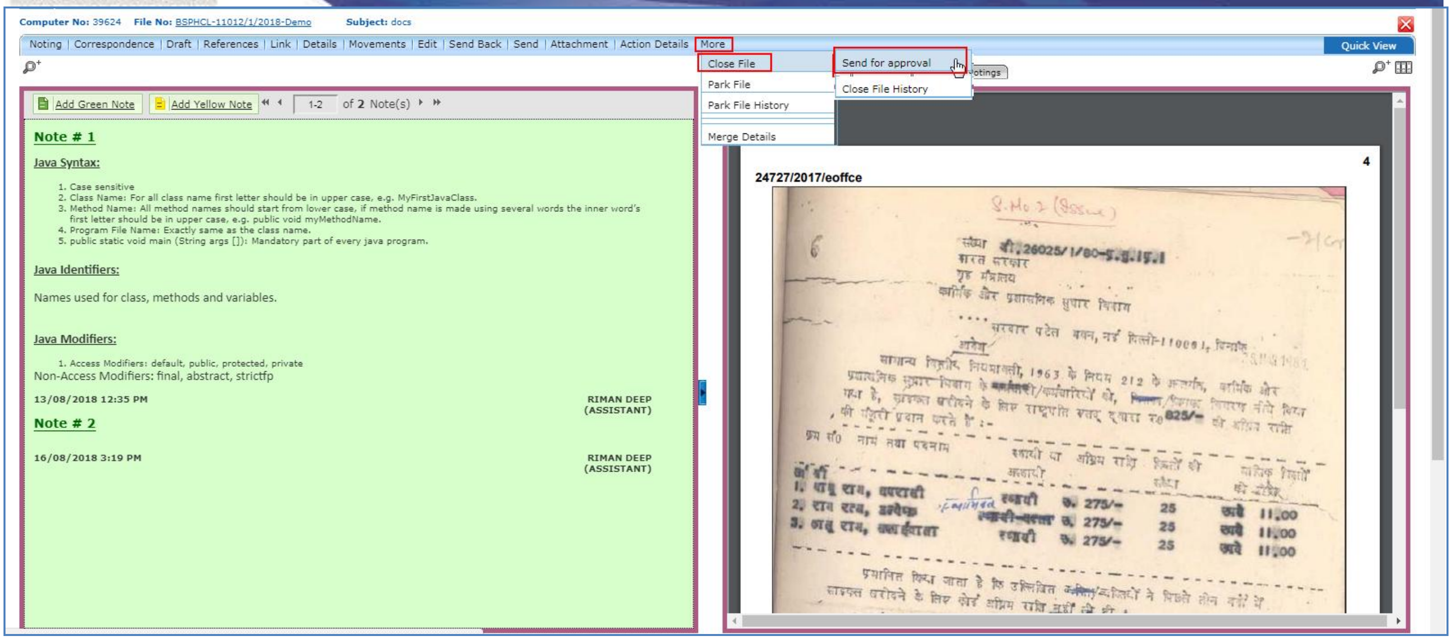


Fig.168

- Provide mandatory remarks and click **Send** button as shown in **Fig.169**:

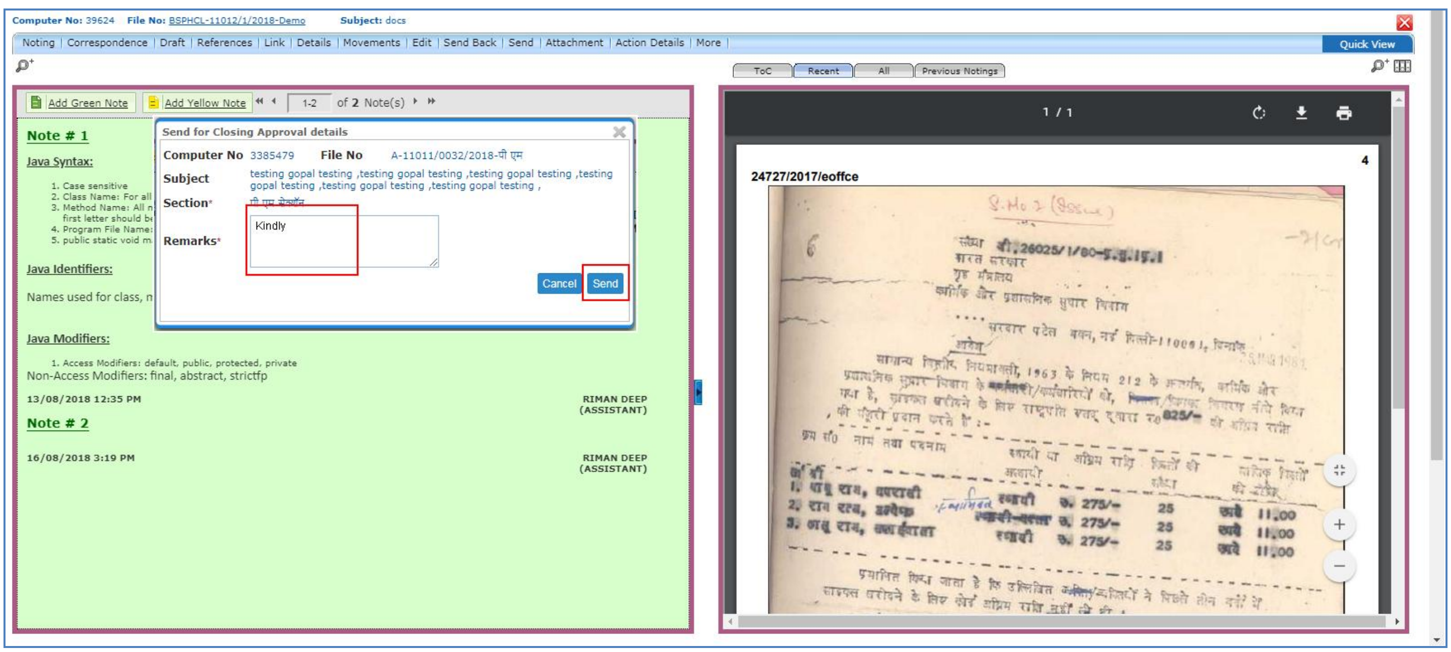


Fig.169

- A confirmation pop-up appears, click **OK** button as shown in **Fig.170**:

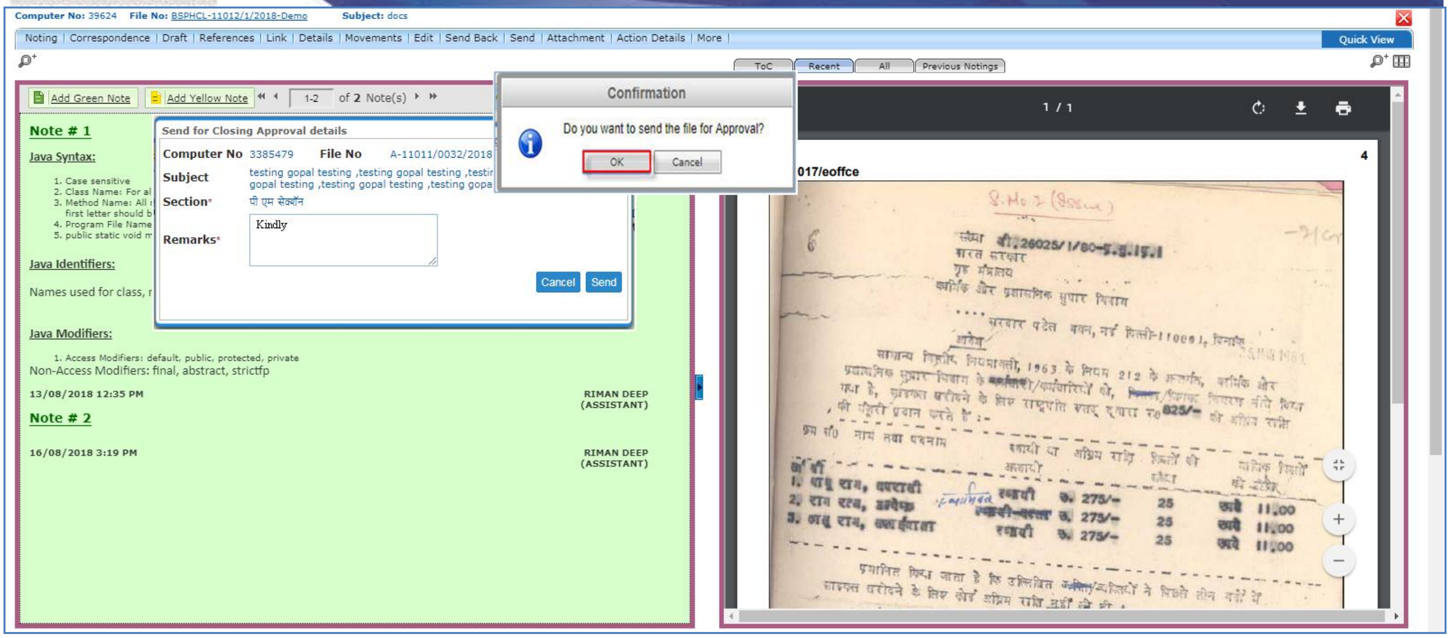


Fig.170

- The file closing approval will be submitted with the concerned approver.

Note:

File(s) which have been submitted for closing approval can be viewed from default sub-folder “Submitted Files for Closing Approval” in File Inbox sub-module.

- The user(s) with role of **Approver** can view all the closing and reopening approval requests sent to him/her in Inbox Approval Request sub-module, as shown in **Fig.171**:

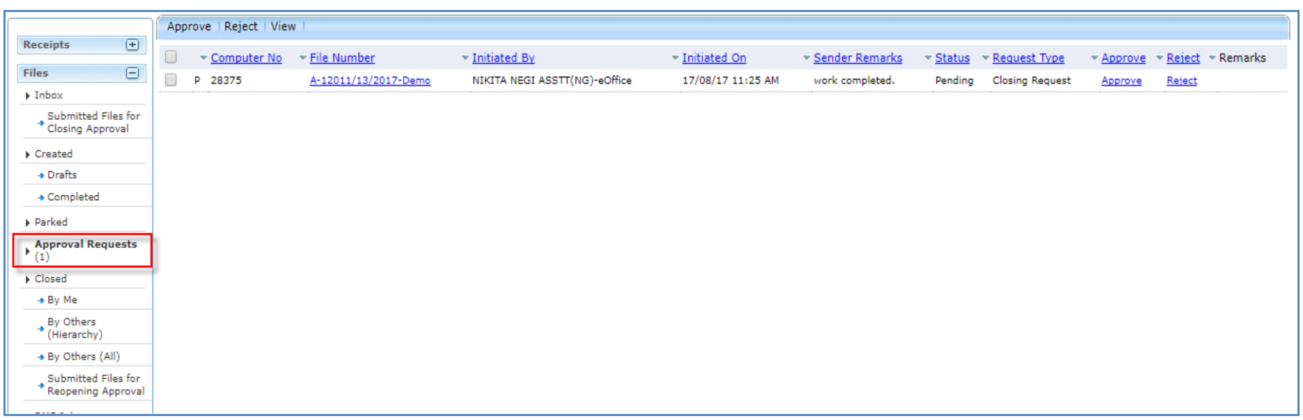


Fig.171

- User can approve or reject the request of closing/reopening of the file by providing mandatory remarks as shown in **Fig.172**:

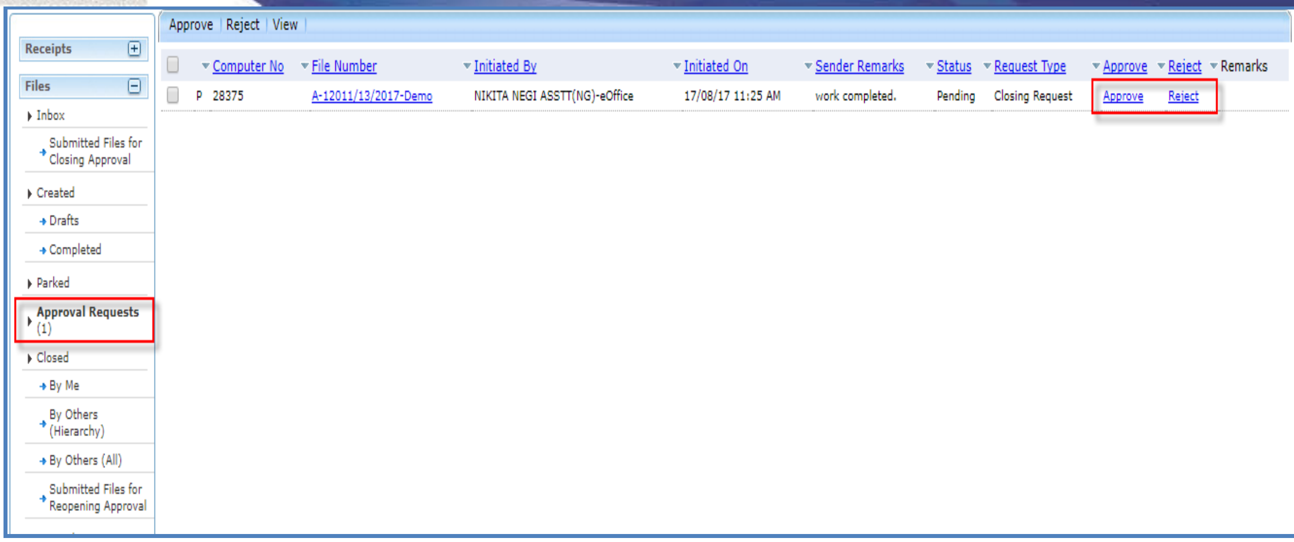


Fig.172

Once the Approver, approve or rejects a file:

- History of the files which were Approved or Rejected is maintained in the Approval Requests module.
- The user who had initiated the request for closing of the file will be able to see the Status as Approved or Rejected under his **Inbox** sub-folder "**Submitted Files for Closing Approval**".
- After getting the approval, the user can closes the file by clicking on "**Close**" as shown in **Fig.173**:

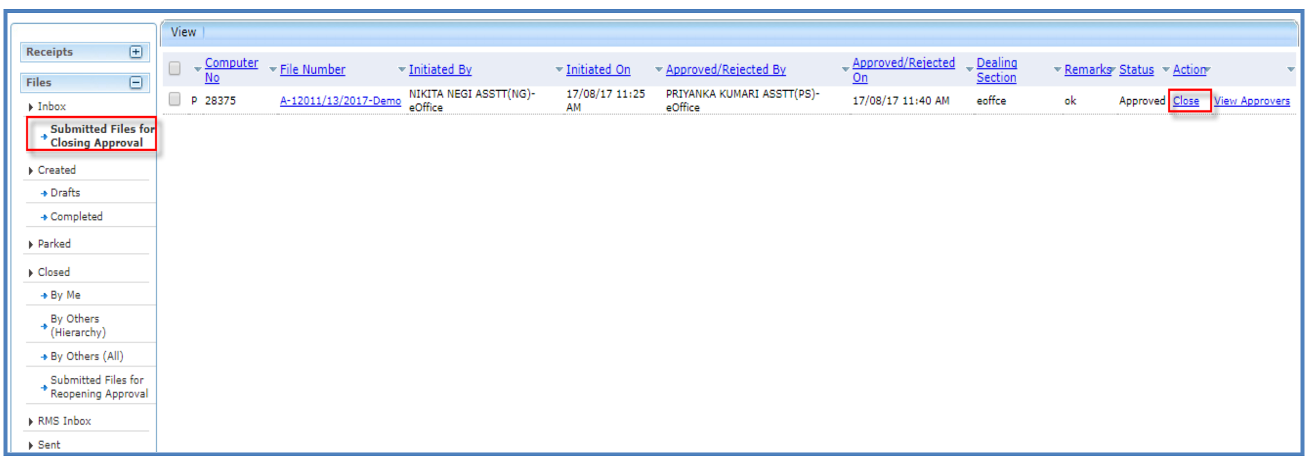
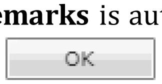


Fig.173

- Final **Closing Remarks** is auto filled with the closing request remarks, if required user can **update/edit** remark and click 

button as shown in **Fig.174**:

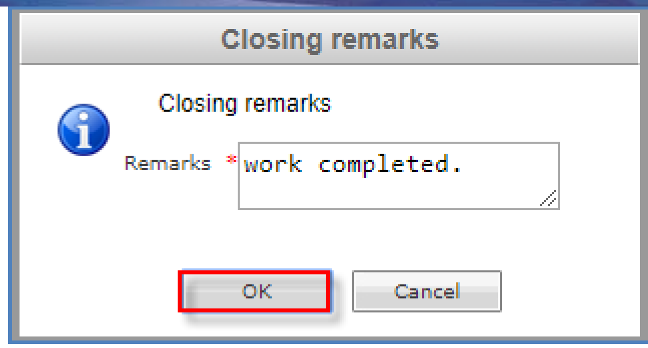


Fig.174

Note:

Closing Request Remark: The remarks put up by the Subordinate while sending the request for file closing.

Closing Approval Remark: The remarks put up by the Approver/ Senior Officer while approving the request for file closing.

Final Closing Remark: The remarks put up by the Subordinate/ Official while closing the file after approval.

By default closing remarks (Final Closing Remark) are remarks (Closing Request Remark) provided by the user while sending file closing request for approval.

- The files which are closed by the user will be in the users "**Closed**" sub-section under "**By me**" section in the File left navigation as shown in **Fig.175**:

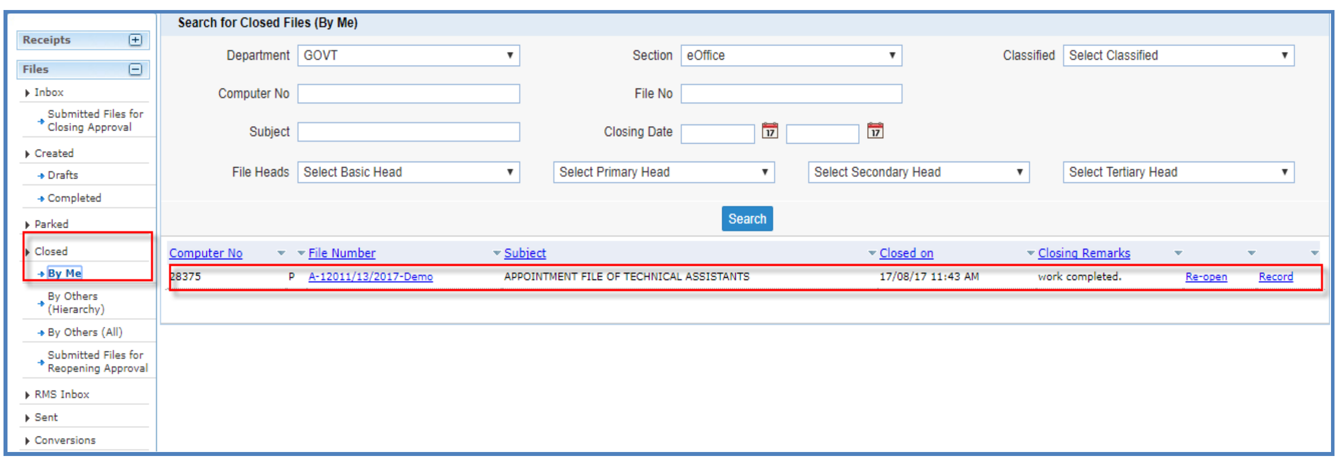


Fig.175

b) **Close File History**: It displays the history of the closed file.

Note:

Refer Close File History link mentioned under More Action tab of Inbox sub-module.

c) **Park File**: It is used for temporarily storing the files which are currently not in use, but can be used later.

Note:

Refer Park File link mentioned under More Action tab of Inbox sub-module.

d) **Park File History**: It displays the history of the parked file.

Note:

Refer Park File History link mentioned under More Action tab of Inbox sub-module.

Physical Files Action tabs

Let us learn following different options available in the menu bar for Physical files.

- **Correspondence**: Correspondence is any letter/ DAK which is diarized for action to be taken in file. It is used to attach Correspondence/ Receipt to the working File.

Note:

Refer to steps mentioned under Correspondence action tab of File Inbox (Electronic File Action Tabs) sub-module.

a) **Attach with another**: It is used to remove the receipt from ToC and attach as correspondence in any other Physical File.

To attach the receipt with another File, perform following steps:

- Select the receipt and click **Attach With Another** link from the dropdown as shown in **Fig.176**:

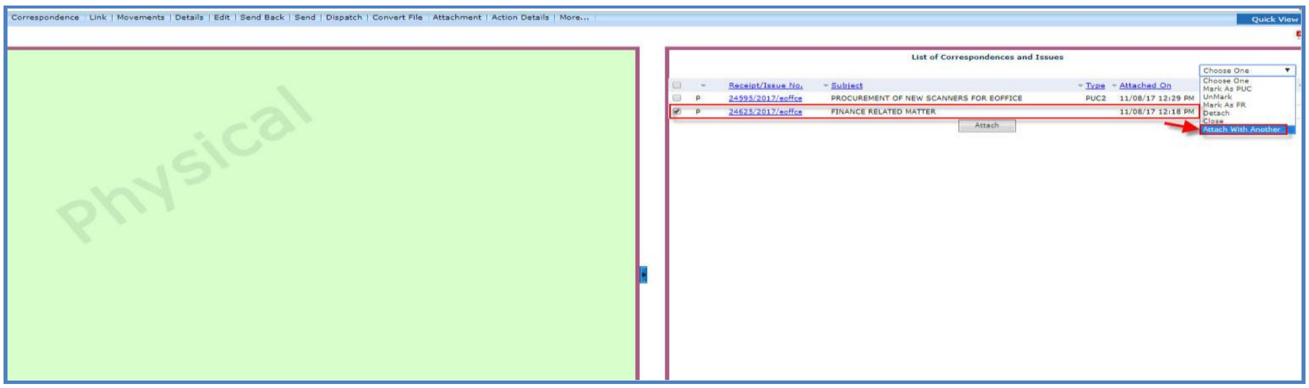


Fig.176

- A of files appear, select the File and click Attach button as shown in **Fig.177**:

Fig.177

Note:

The list contains files which are present in ‘Created (Completed)’ or ‘Inbox’ section of File.

- The receipt gets detached from the current file and attached as correspondence to the selected File.

2. **Link**: It is used to refer the other active file (Created or ‘Inbox’ sub-module) along with working file. The copy will have all the content of the linked file, upto the moment of linking.

Note:

Refer to steps mentioned under Link action tab of File Inbox (Electronic File Action Tabs) sub-module.

3. **Movements**: This option is used to track the **Movements** of the file which automatically gets updated as File moves from user to another as shown in **Fig.178:**

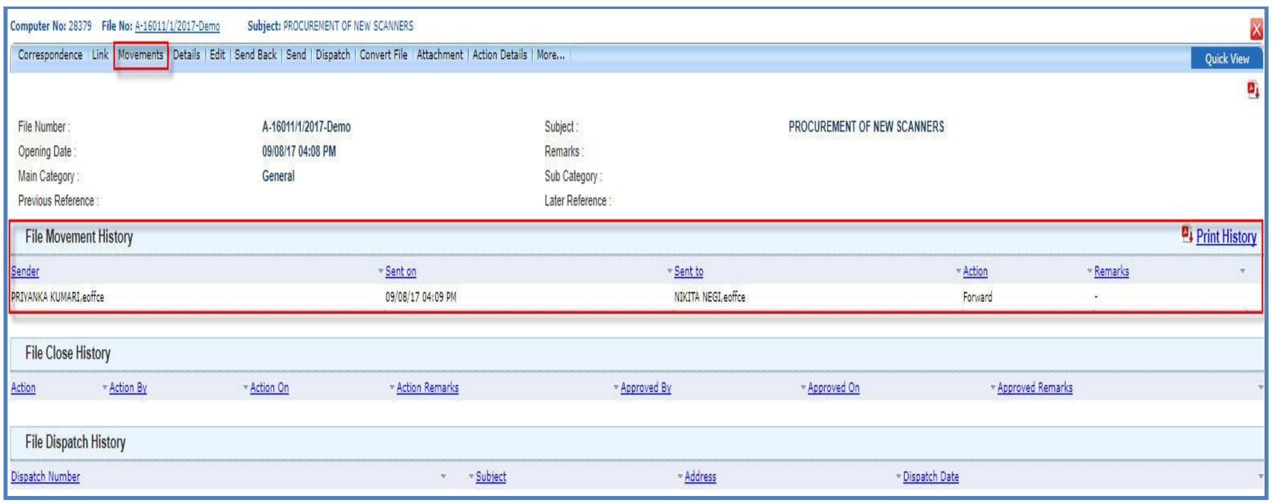


Fig.178

4. **Details**: It can be used to view the details of a File i.e. File cover Page details and total no. of part Files created, volume files created etc. as shown in **Fig.179**:

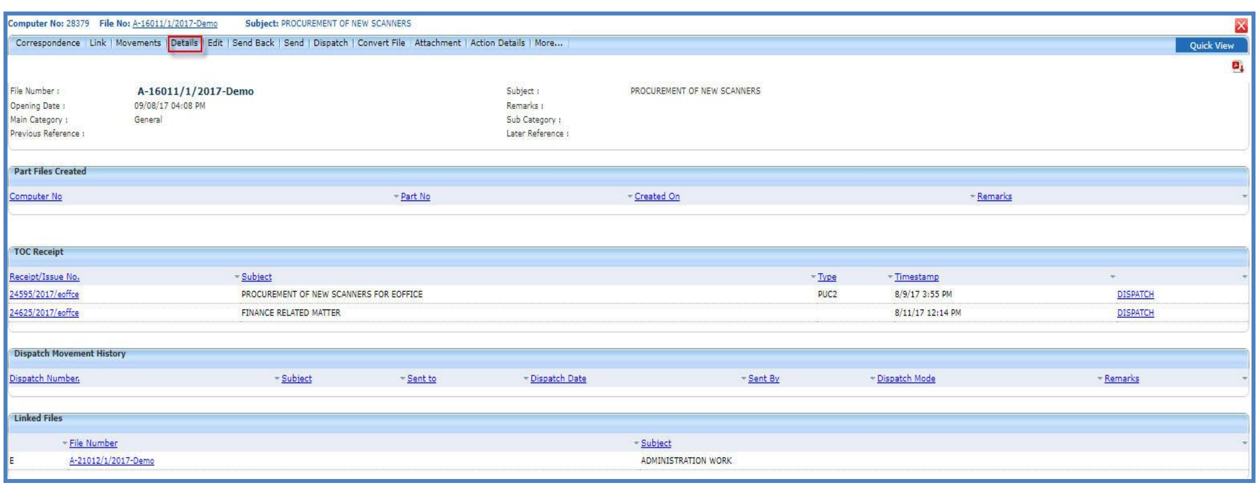


Fig.179

5. **Edit**: It can be used to make changes to the cover page of existing running file except the File Number.

Note:

Refer to steps mentioned under Edit action tab of File Inbox (Electronic File Action Tabs) sub-module.

6. **Send back**: It is used to send the file back to the sender of the File.

Note:

Refer to steps mentioned under Send action tab of File Inbox sub-module.

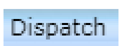
7. **Send**: This option facilitates the user to mark the file to the intended recipient(s).

Note:

Refer to steps mentioned under Send action tab of File Inbox sub-module.

8. **Dispatch**: It is a process of issuing an official reply to the concerned user/department/ministry after the approval from the internal competent authority.

   To Dispatch an issue against a File, perform the following steps:

   - Click the 

 tab, as shown in **Fig.180**:

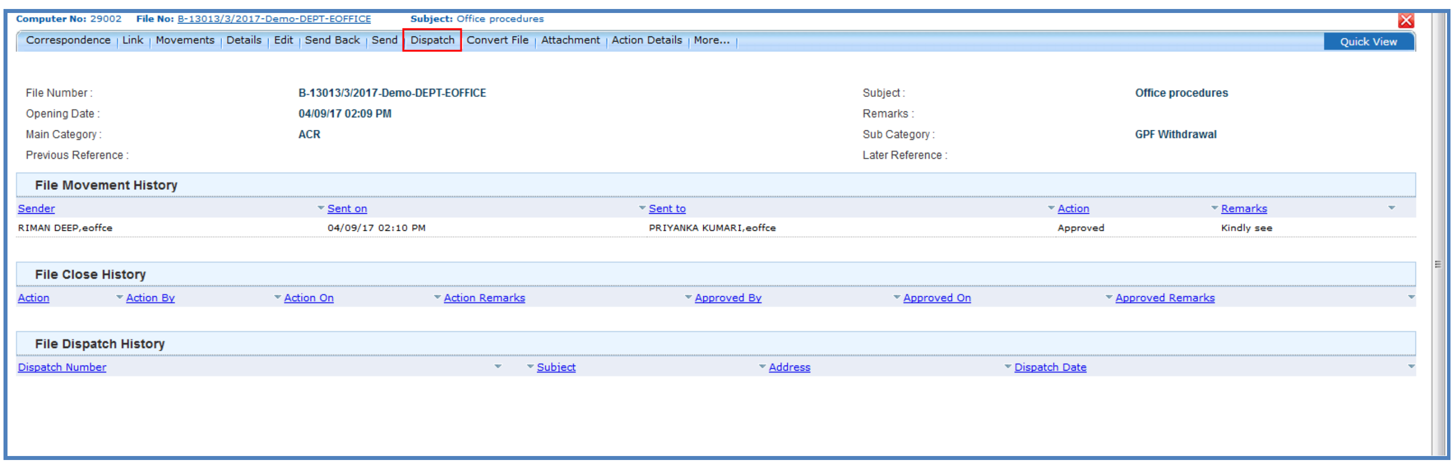


Fig.180

   - The Dispatch screen appears. Enter the Draft details and Communication details, the action menu available are as shown in **Fig.181**:

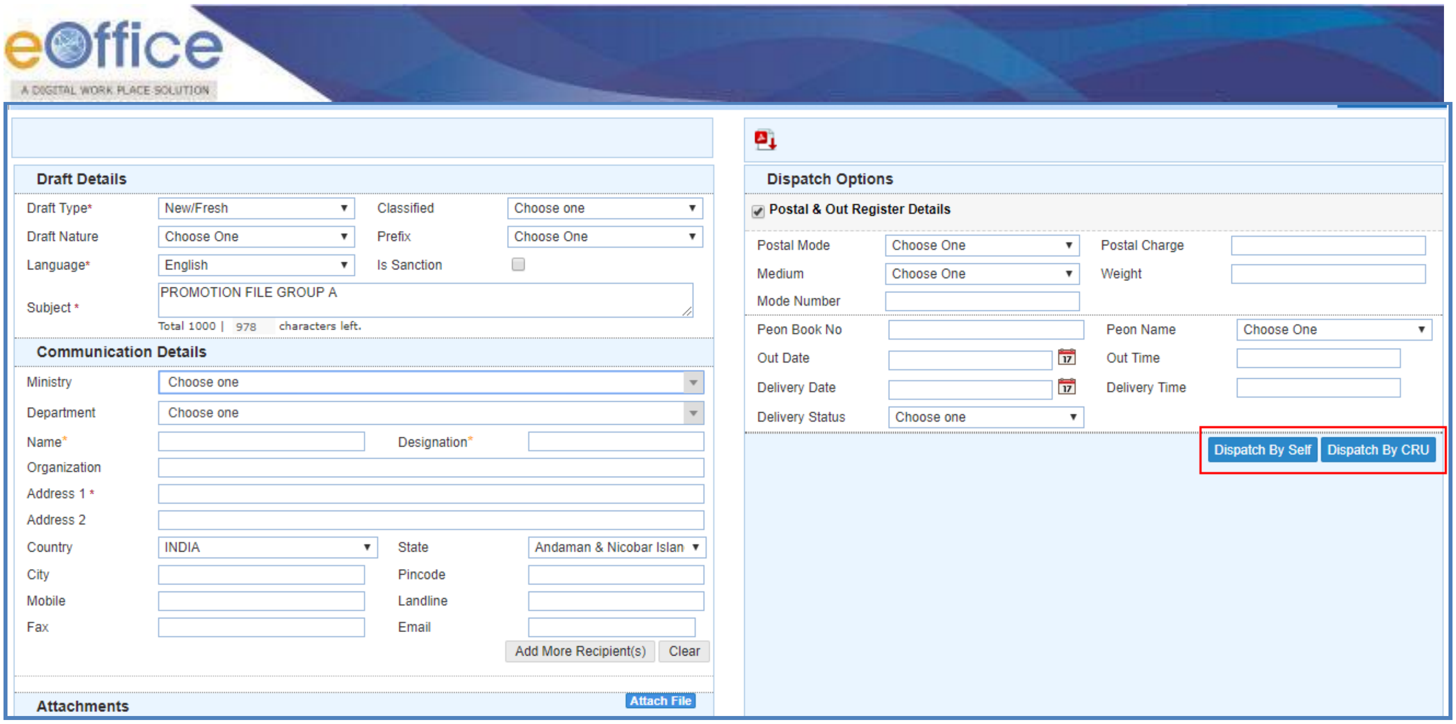


Fig.181

a) **Dispatch By self:** It is used, if the person, who has the file with the approved draft, wants to dispatch (send the issue) himself/ herself, the issue can be dispatched electronically through mail (by using "Email Details") or physically through post (by using "Postal & Out Register Details").

Note:

Refer the steps mentioned under Dispatch By self action menu of Receipt Browse & Diarise sub-module.

b) **Dispatch By CRU:** It is used, if the person, who has the file with the approved draft, wants the issue to be dispatched (send the issue) by the CRU, instead himself/ herself, the issue can be dispatched electronically through mail (by using "Email Details") or physically through post (by using "Postal & Out Register Details").

Note:

Refer the steps mentioned under Dispatch By CRU action menu of Receipt Browse & Diarise sub-module.

9. **Convert File**: It is used to convert the **Physical File** to **Electronic File**, irrespective of the File location, i.e. whether in the File Inbox/Created sub-module.

Note:

At the time of conversion scanned pdf of the earlier notings will be required for the attachment.

To convert Physical File to Electronic File, perform following steps:

1. Click Convert File tab, as shown in **Fig.182**:

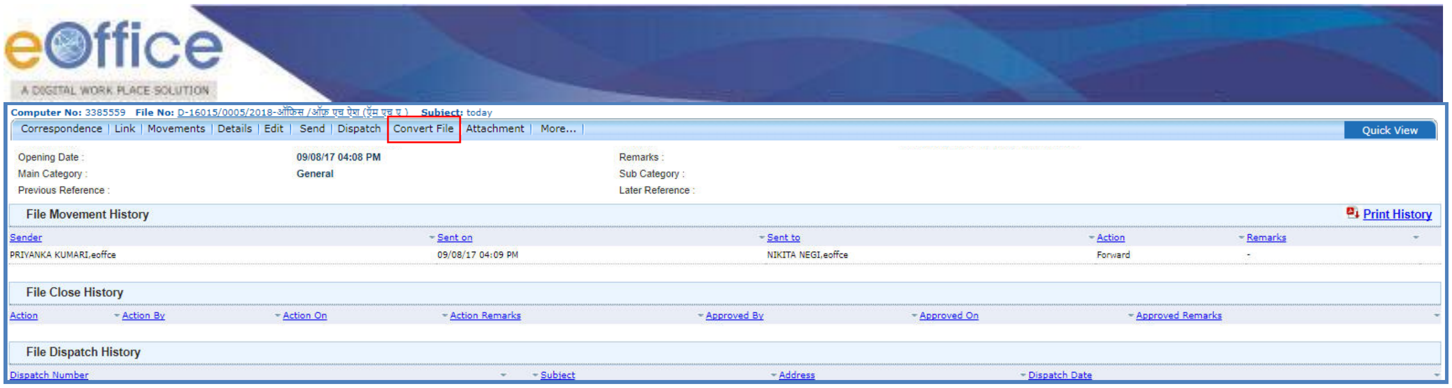


Fig.182

2. Upload scanned copy of **correspondence/Issues** (if correspondence or issues are attached in physical file), and scanned copy of **Noting** (if required),

3. Click (**Convert**) button ,as shown in **Fig.183**:

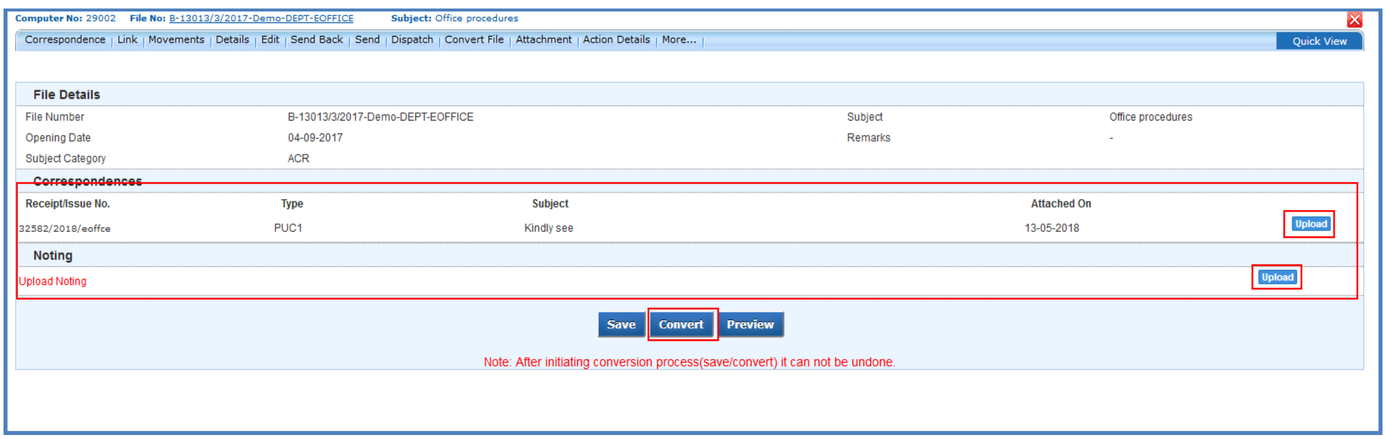


Fig.183

Note:

The max size for uploading nothing and correspondences should not be more than20MB.

4. Enter the remarks and Click **OK** button, as shown in **Fig.184**:

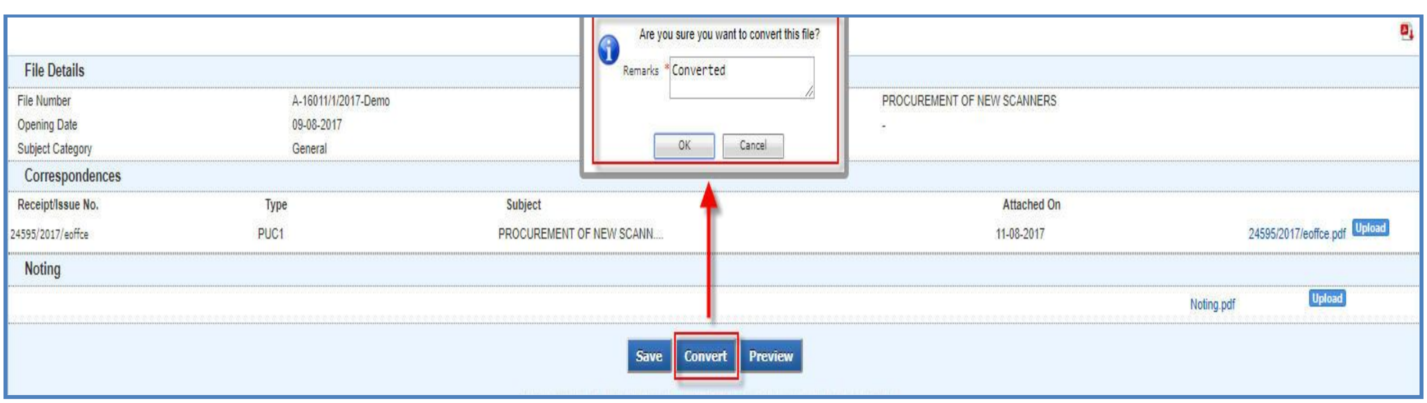


Fig.184

Note:

Save: It is used to save file in draft state during conversion process to work on later stage. And the file moves under Draft link of Conversions sub-module.

Preview: It is used to preview file before final conversion.

5. The File get **converted** from Physical to Electronic, as shown in **Fig.185**:

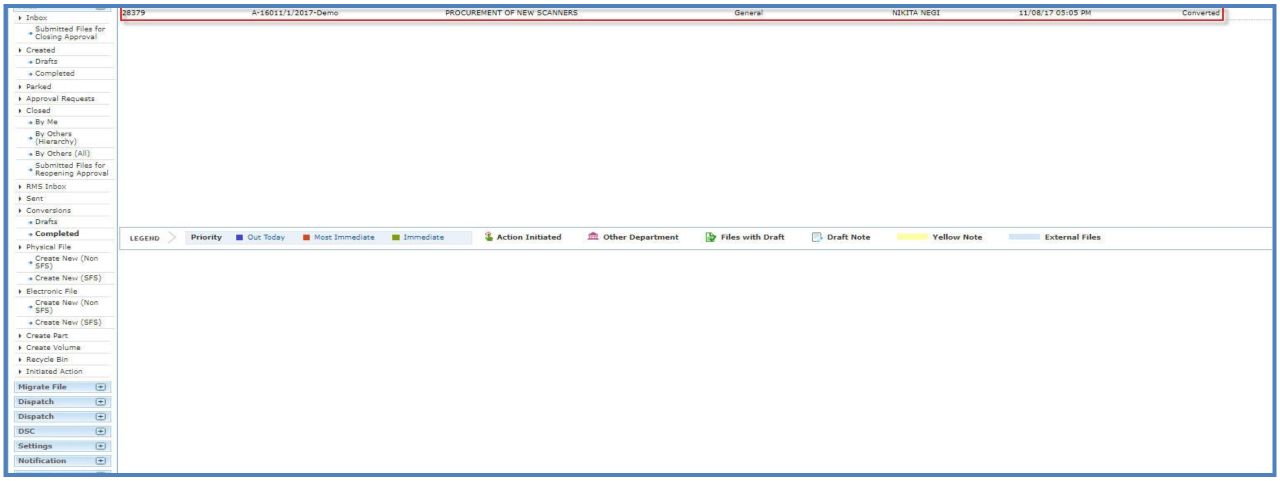


Fig.185

- The converted File moves under Completed link of Conversions sub-module.

6. **Attachment**: It is used to attach the File or Receipt on working File.

Note:

Refer to steps mentioned under Attachment action tab of File Inbox (Electronic File Action Tabs) sub-module.

7. **Action Details**: To view or add remarks against the files for which action has been initiated.

Note:

Refer to steps mentioned under Action Details action tab of File Inbox (Electronic File Action Tabs) sub-module.

8. **More**: It is used to Close and Park the active file, check closing/parking history, to create volume, Merge Files and to view Merge Details.

   a) **Close File**: It is used to **Close** the active File and to view the history of Closed File.

Note:

Refer Close File link mentioned under More Action tab of Inbox (Electronic Files Action Tabs) sub-module.

   b) **Close File History**: It displays the history of the closed file.

Note:

Refer Close File History link mentioned under More Action tab of Inbox sub-module.

   c) **Park File**: It is used for temporarily storing the files which are currently not in use, but can be used later.

Note:

Refer Park File link mentioned under More Action tab of Inbox sub-module.

d) **Park File History**: It displays the history of the parked file.

Note:

Refer Park File History link mentioned under More Action tab of Inbox sub-module.

e) **Create Volume**: This link helps the user to create a new Volume of an existing physical file **Fig.186**:

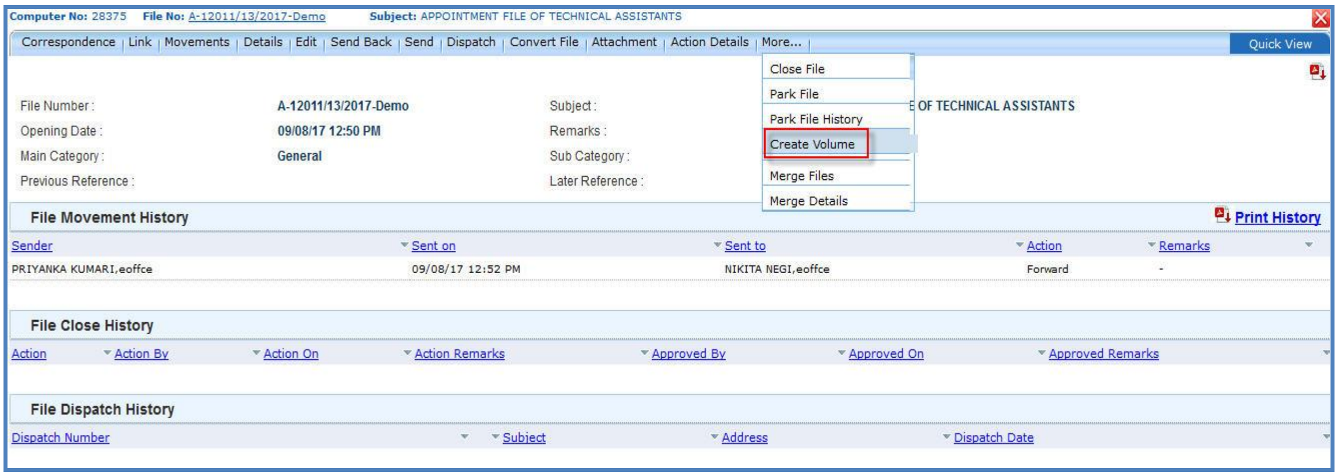


Fig.186

Note:

Refer to Create Volume module for the process.

f) **Merge Files**: It is used to merge two or more physical files. Merged file will be in 'View only' mode.

To merge other physical file with the working file, perform following steps:

- Click the **Merge Files** link from the drop down, as shown in **Fig.187**:

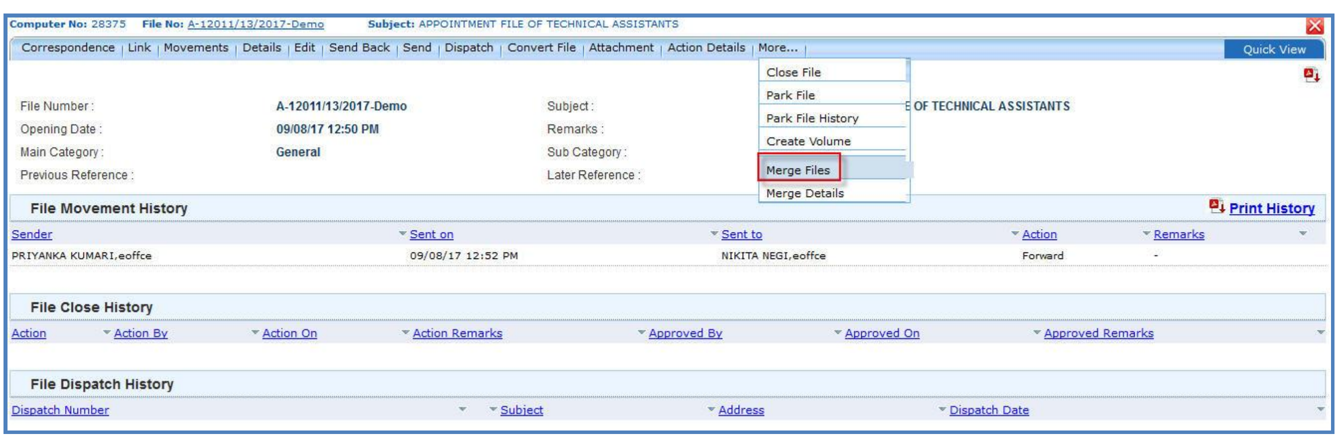


Fig.187

- The Merge Files list screen appears.
- Select the file and click the Add button, as shown in **Fig.188**:

Fig.188

- The selected file moves to Merge File(s) section. Click Merge button to merge the selected file to the working file, as shown in **Fig.189**:

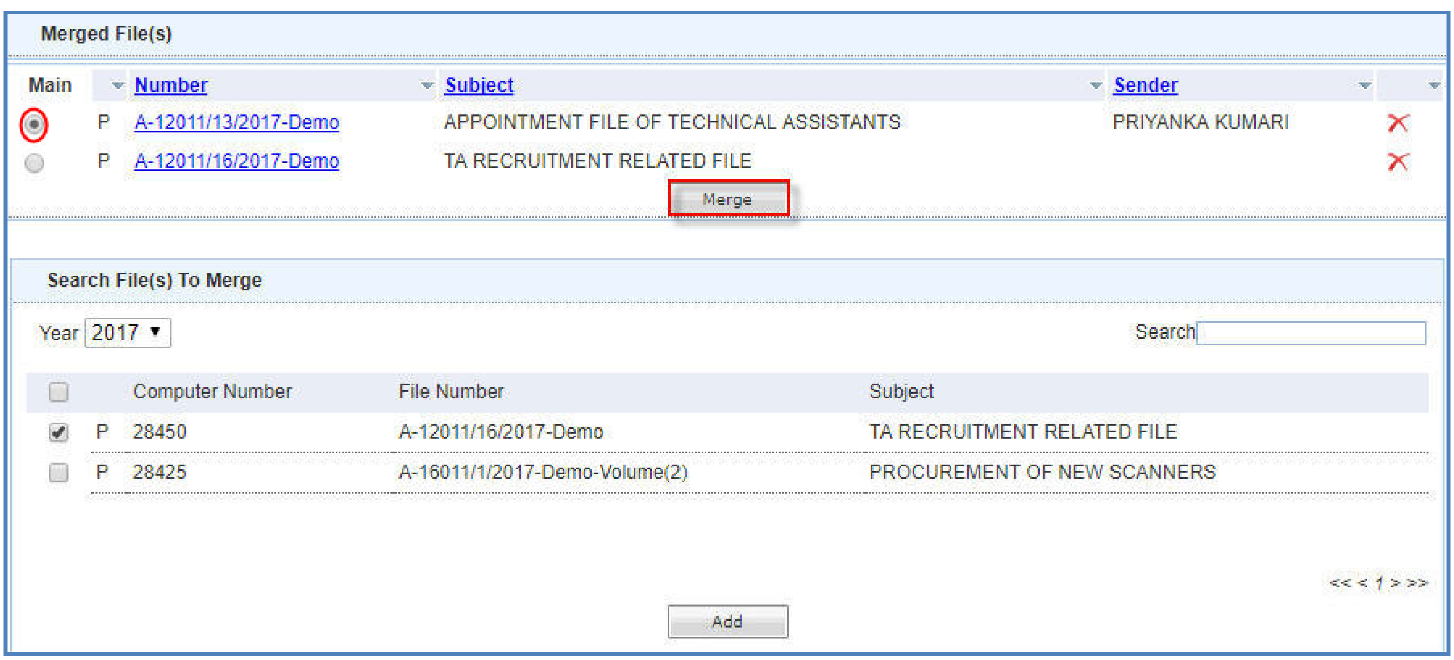


Fig.189

- User can select any of the file as main file by checking the radio button, shown in (**Fig.189**).
- The Merge Alert appears, enter the Remarks and click the  button, as shown in **Fig.190**:

Fig.190

- The file gets merged with the working file.

g) **Merge Details:** It contains the list of files which are merged under Merge files link of **More** action tab, as shown in **Fig.191:**

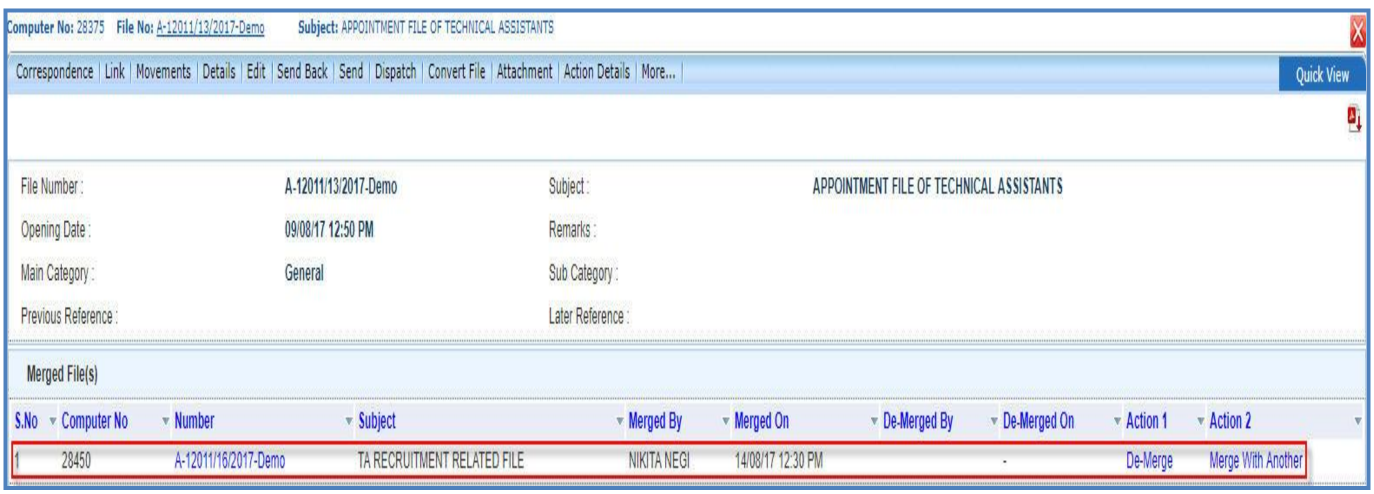


Fig.191

Note:

Files with attachments (File/ Receipt) cannot be merged.

Submitting Files for closing Approval

It contains **File(s)** which have been submitted by the user for **closing approval.**

- From "**Status**" column, user can check the **status** of the status of file whether 'Approved/ Pending/ Rejected'.
- From "**Action**" column, user can take three **actions** 'Close/ Cancel/ Move to Inbox' corresponding to Approved, Pending and Rejected.

- **View Approvers (View Approvers)** link includes the list of approving Officer(s) in the section/ division, as shown in **Fig.192:**

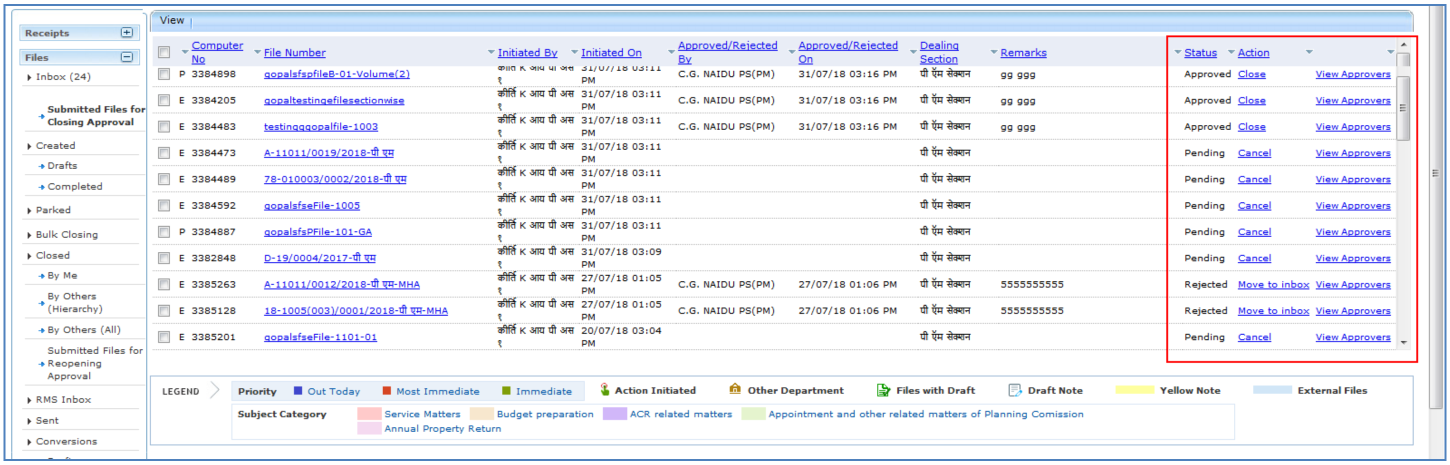


Fig.192

The action tab provided in Submitted Files for Closing Approval is discussed below:

1. **View**: It is used to sort the Files based on its current status. i.e. (Approved, Pending, Rejected and All) as shown in **Fig.193**:

   a) **Approved**: To view the Files with status as 'Approved'.

   b) **Pending**: To view the Files with status as 'Pending'.

   c) **Rejected**: To view the Files with status as 'Rejected'.

   d) **All**: To get all the Files send for closing approval from the latest to the oldest order (Default View).

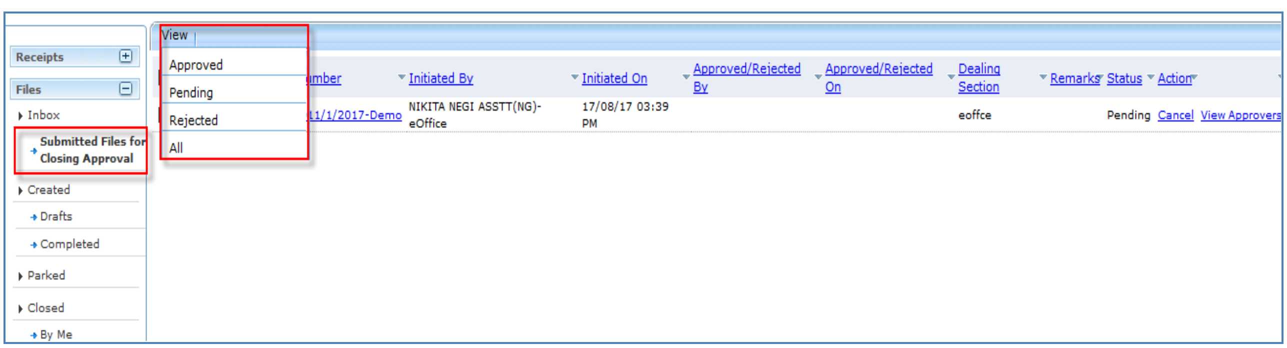


Fig.193

Created

It contains list of Files whose File number has been generated but not being marked/sent.

There are **3** action tabs provided under Completed link of Created sub-module, as shown in **Fig.194**:

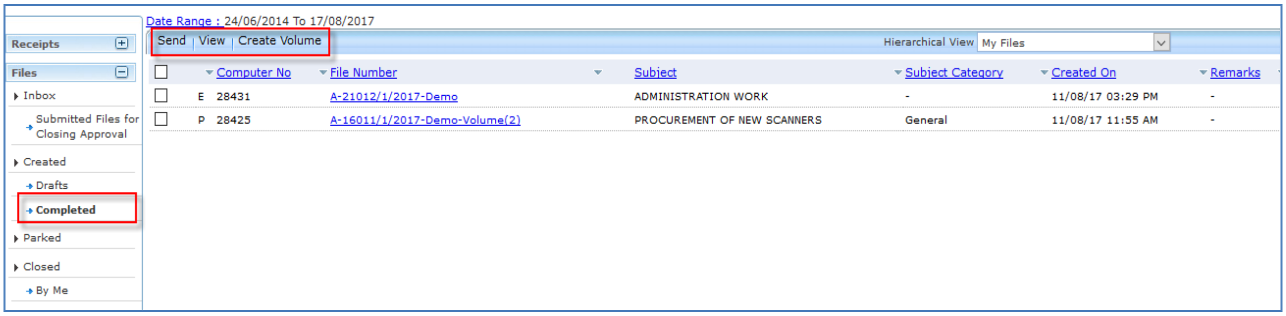


Fig.194

1. **Send**: This option facilitates the user to mark the File to the intended recipient..

Note:

Refer to FileSendSend in File Inbox for the process.

2. **View**: It is used to sort the File based on different criteria such as Physical, Electronic, etc, as shown in **Fig.195**:

Fig.195

a) **Physical**: To view all Physical Files.

b) **Electronic**: To view all Electronic Files.

c) **All**: To get all the created Files from the latest to the oldest order (Default View).

3. **Create Volume**: It is used to create a new **Volume** of an existing **Physical File**.

Note:

Refer the steps mentioned under File Create Volume sub-module.

Parked

It contains list of Files that are temporary closed and work will be done later on. Pendency of File will be removed if any file is parked. Parked files can be made active at any point of time.

To view Parked File, perform the following steps:

- Click **Parked** sub-module.
- File can be searched and viewed on the basis of six different statuses as shown in **Fig.196**:

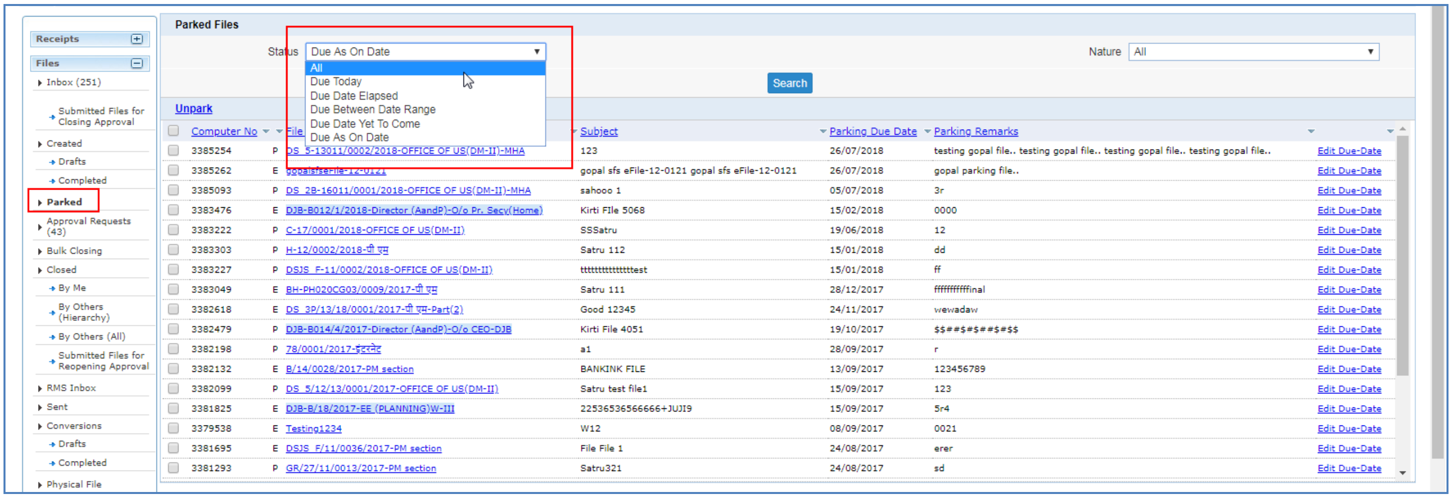


Fig.196

- The action tabs available on parked files are shown in **Fig.197**:

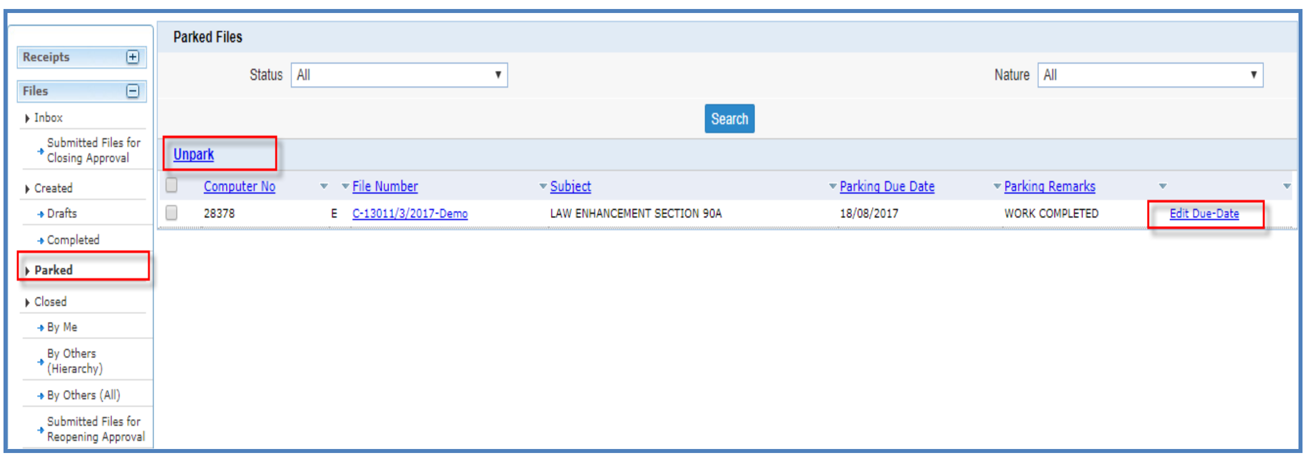


Fig.197

a) **Edit Parking Due-Date:**

To edit the due date, perform following steps:

- Click Edit Due-Date link. The Edit Parking Due Date Confirmation box appears as shown in **Fig.198**:

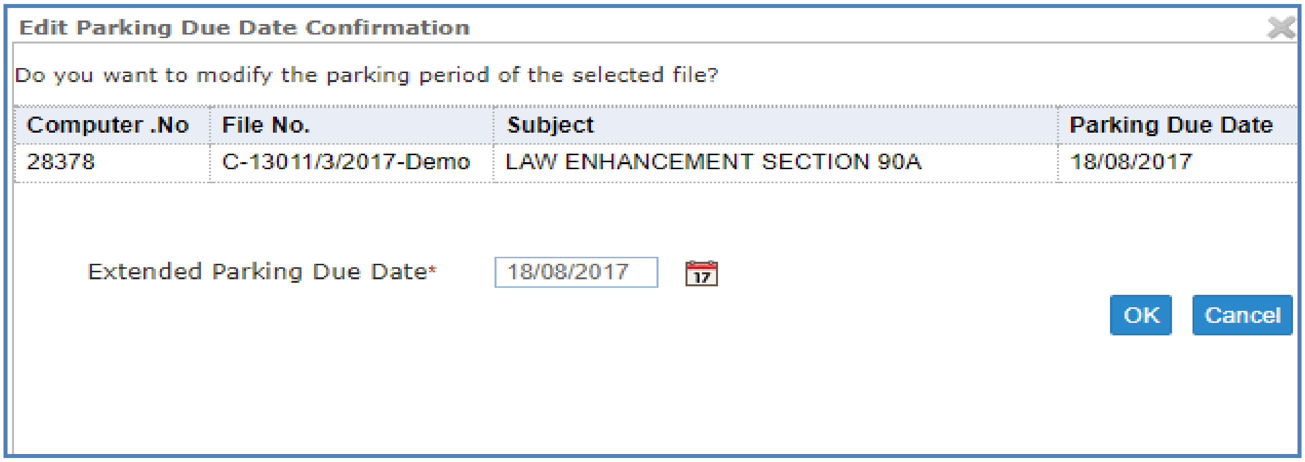


Fig.198

- Select Extended Parking Due date from calendar icon and Click OK button as shown in **Fig.199**:

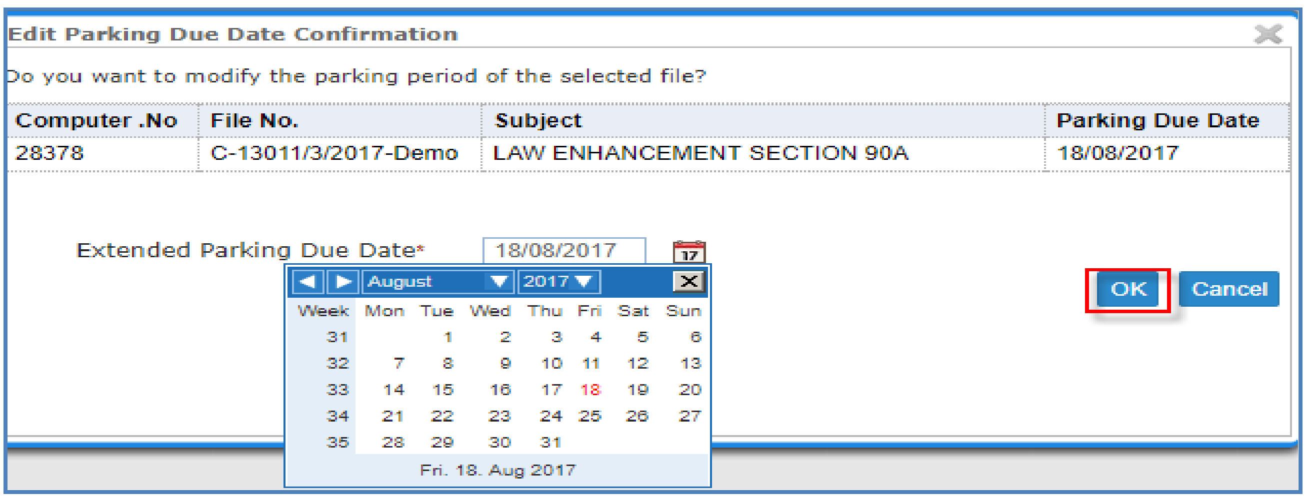


Fig.199

a) The due date will be extended.

b) **Unpark File:**

To Unpark File, perform following steps**:**

- Select File(s) and click Unpark link. The Unparking Confirmation box appears as shown in **Fig.200**:

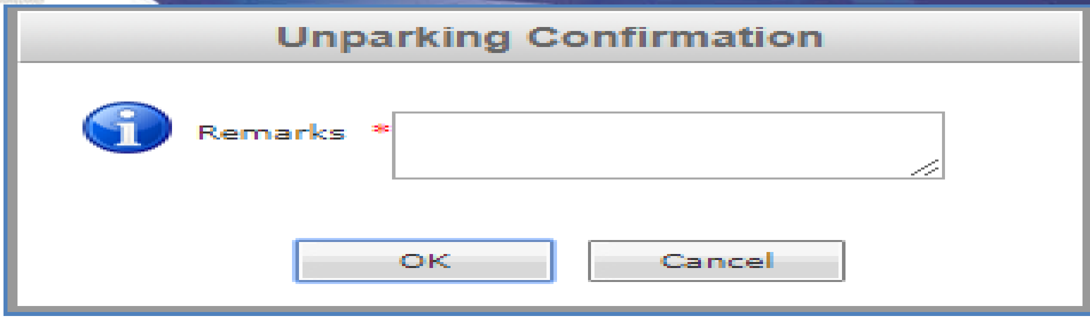


Fig.200

- Enter the Remarks and click OK button.
- The Files become active and move to the File Inbox.

PARKED FILE ALERTS:

Alerts for the parked files gets displayed as Parking Notifications icon () when the parking due date is reached.

To view the parked files through alerts, perform the following steps:

- Click Parking Notifications icon, the Notification pops up is displayed.
- Click Due As on Date link as shown in **Fig.201**:

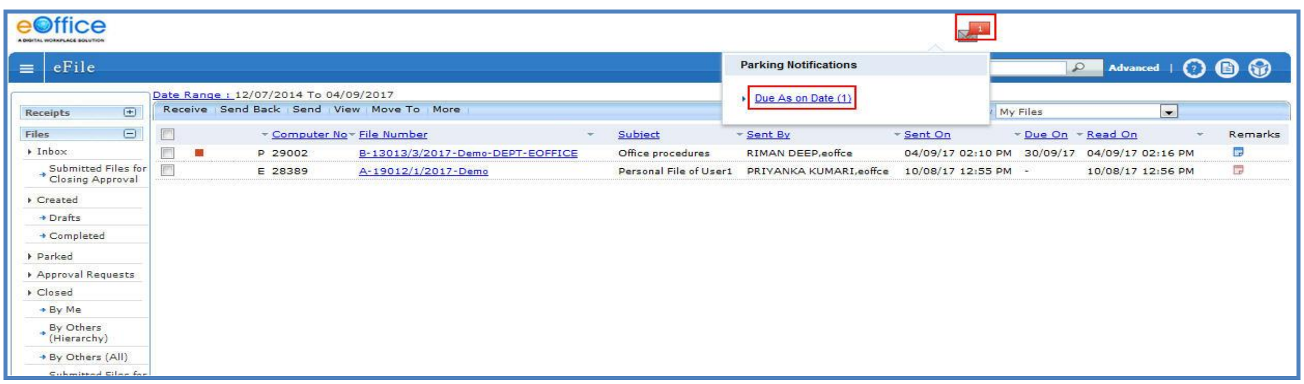


Fig.201

- The list of the parked files for which parking due date is today or due date has elapsed appears, as shown in **Fig.202**:

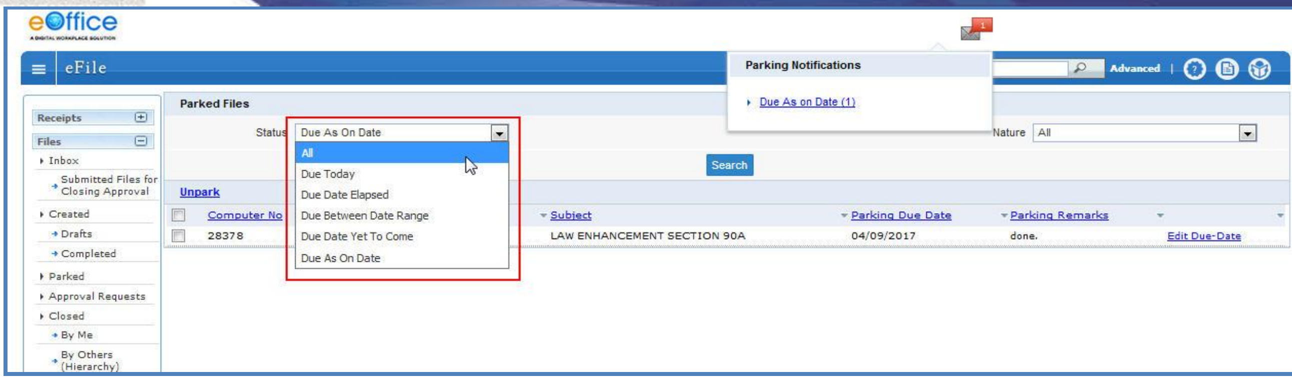


Fig.202

Note:

Parking alerts will be displayed to those users with whom the parked file is lying.

Approval Requests

It contains all the files which are sent by other users/ subordinates of that section/ division, which needs to be closed but require approval of competent authority of that section/division.

Note:

Approval requests module is Role Based. The folder appears only for users who have the role of Approver.

- User/Approver can **Approve** or **Reject** the request of closing/reopening of the file by providing mandatory remarks for the same, as shown in **Fig.203**:

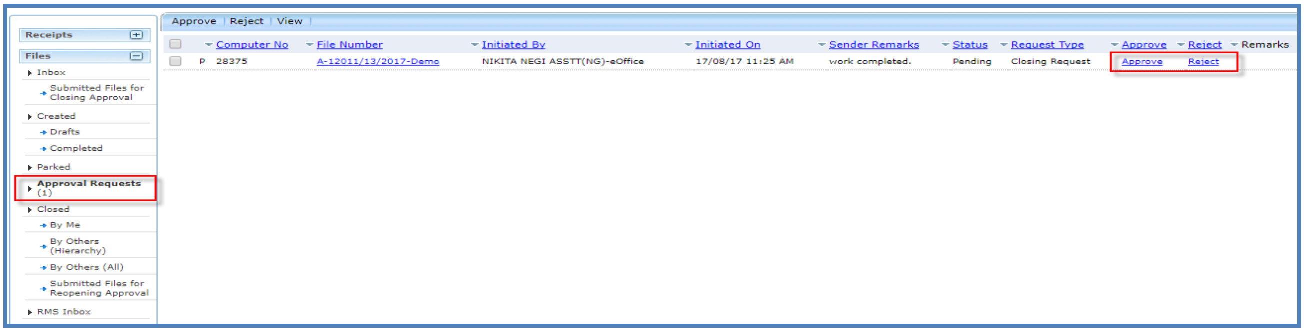


Fig.203

- Remarks, given by the approver to approve or reject the closing/ re-opening request, are maintained in the **Remarks** column against every Approval Request as shown in **Fig.204**:

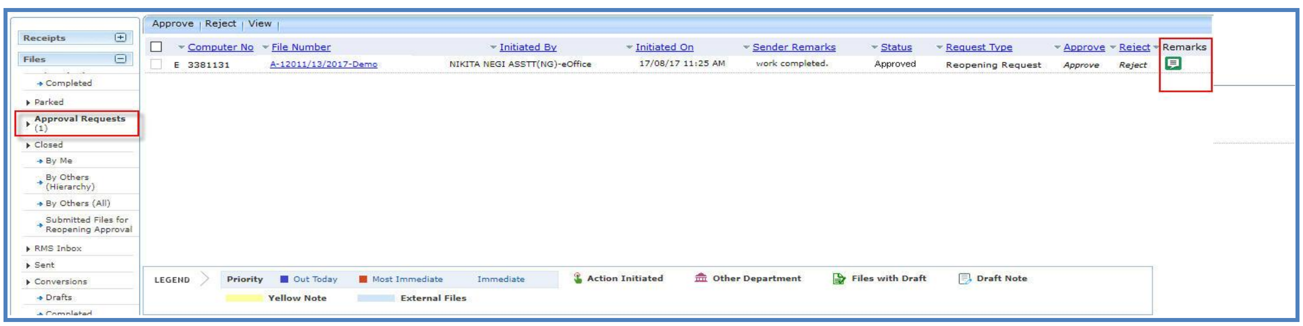


Fig.204

Once the Approver, Approve or Rejects the file:

- The user who had initiated the request for closing of the file will be able to see the Status as Approved or Rejected under his Inbox sub-folder "**Submitted Files for Closing Approval**".
- After getting the approval, the user can close the file by clicking on **Close** button.

Note:

Refer the Submitted Files for Closing approval link mentioned under File Inbox sub-module.

Bulk Closing

It is the process to close multiple files simultaneously.

a) **Closing Role:** User having this role will be able to send requests for closing multiple files to superior/ competent Authority for the approval of closing and after approval, user can close multiple files simultaneously.

b) **Approver Role:** User having this role will be able to approve the closing request of multiple files and himself/ herself can close multiple files simultaneously.

Note:

Maximum number of files that can be sent for closing and approval is fifty (50).

For complete details of closing roles refer to Close process.

User has to perform the following steps while closing multiple files:

- Click **Bulk Closing** module under File in left navigation.
- Select the files from the Bulk closing section and enter the Remarks. Click Submit button for closing the multiple files as shown in **Fig.205:**

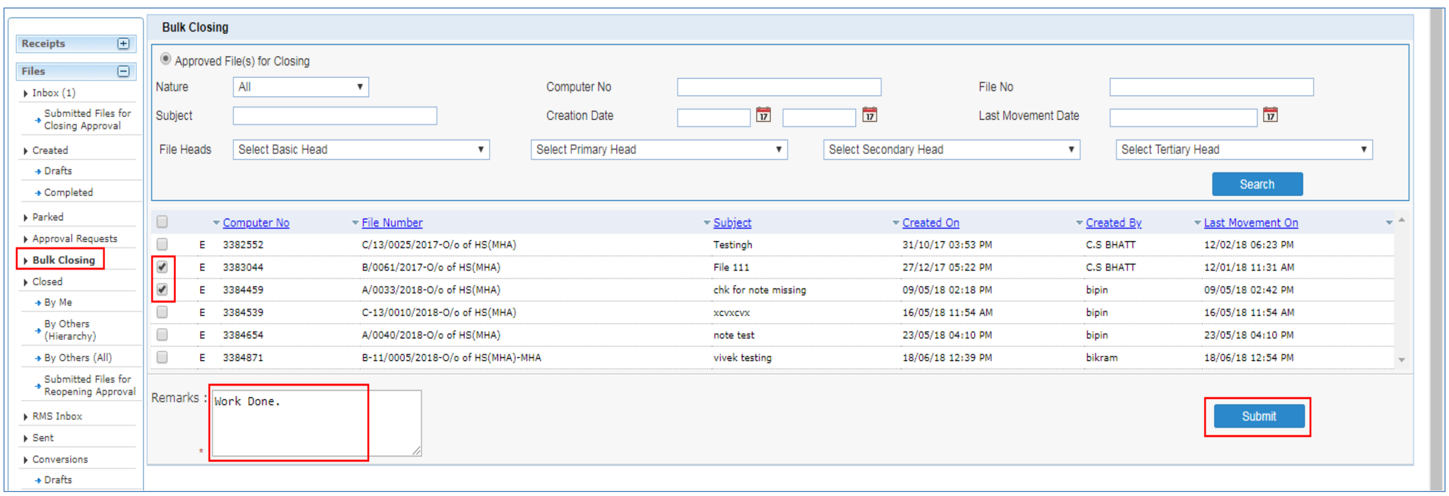


Fig.205

- The Files get closed successfully.

Closed

It contains a list of Files that are **closed** as complete work has been done on it already.

Closed module contains 4 links:

d) **By Me-** Lists all the files closed by the logged in user.

e) **By Others (Hierarchy)-**Lists all the files that are closed by the users of section(s) (which are under the hierarchy of logged in user section).

f) **By Others (All)** - Lists all files that are closed by anyone in the department, irrespective of hierarchy.

g) **Submitted Files for Reopening Approval-** File(s) which have been submitted by the user for Reopening Approval can be viewed from default sub-folder "Submitted Files for Reopening Approval" under Closed modules as shown in **Fig.206**:

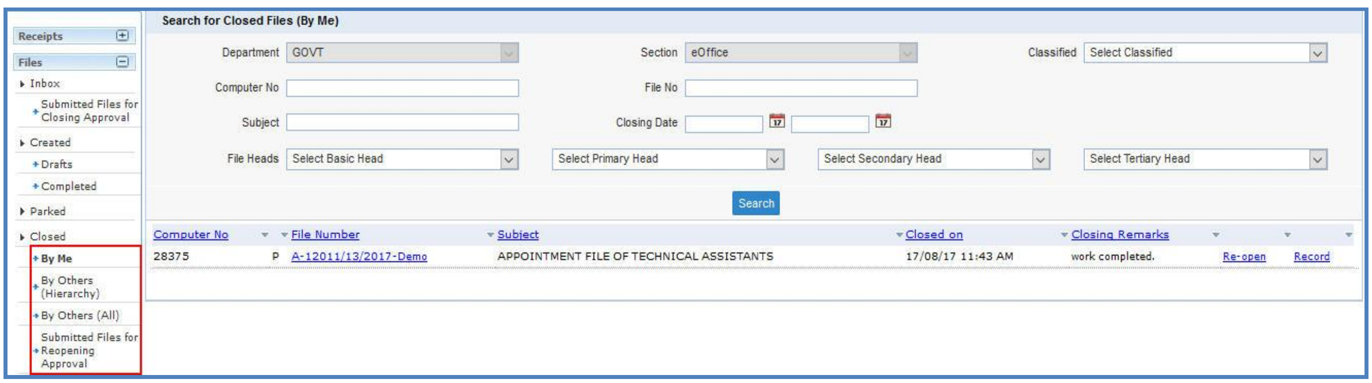


Fig.206

Note:

By Others (Hierarchy) and By Others (All) links are role based .It will be visible to the users whom having the role for Hierarchy and All respectively.

Submitted Files for Reopening Approval sub-module is role based. It will be visible to the users who have the role for closing files.

File Reopening Process

If a file needs to be re-opened, click the "By me" link as shown in **Fig.207**:

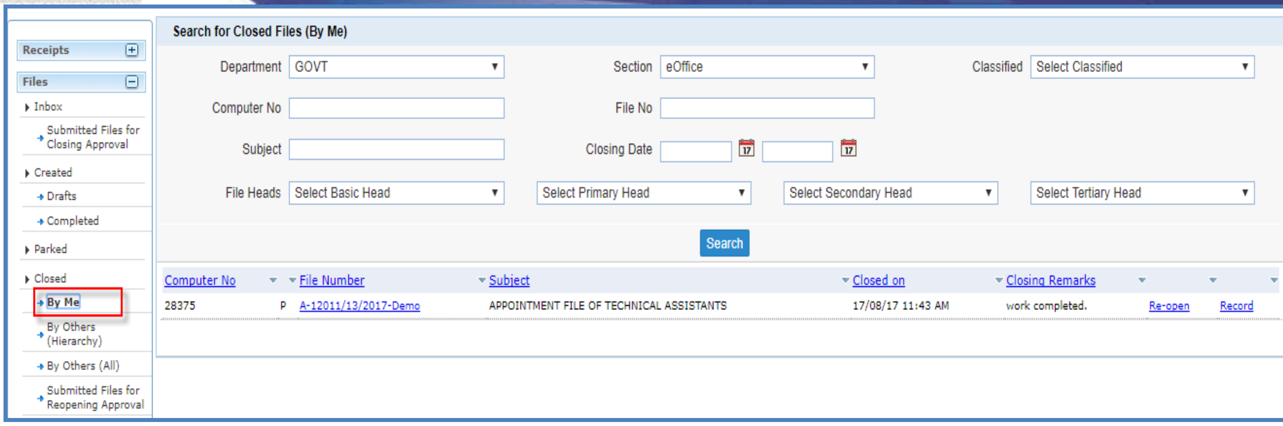


Fig.207

- Select the file and click the Re-open link as shown in **Fig.208**:

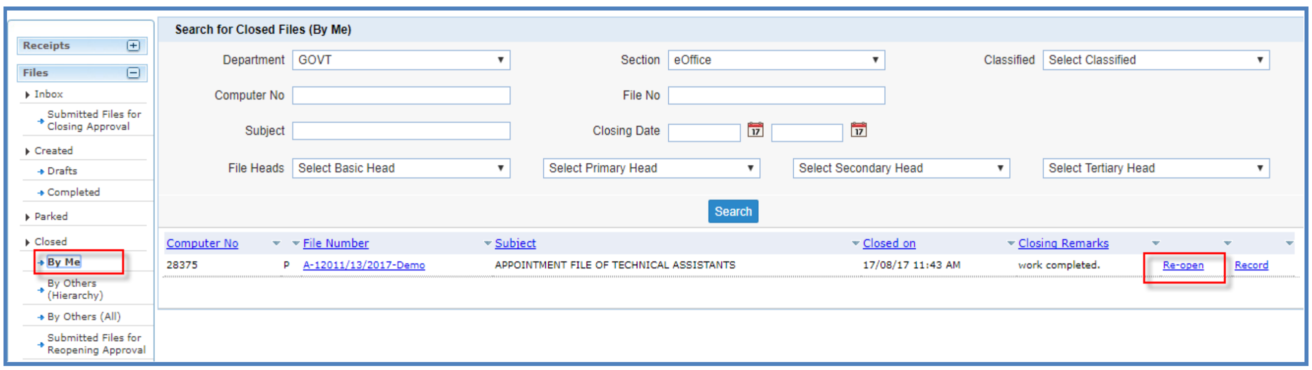


Fig.208

- Reopening confirmation pop-up appears. Click OK as shown in **Fig.209**:

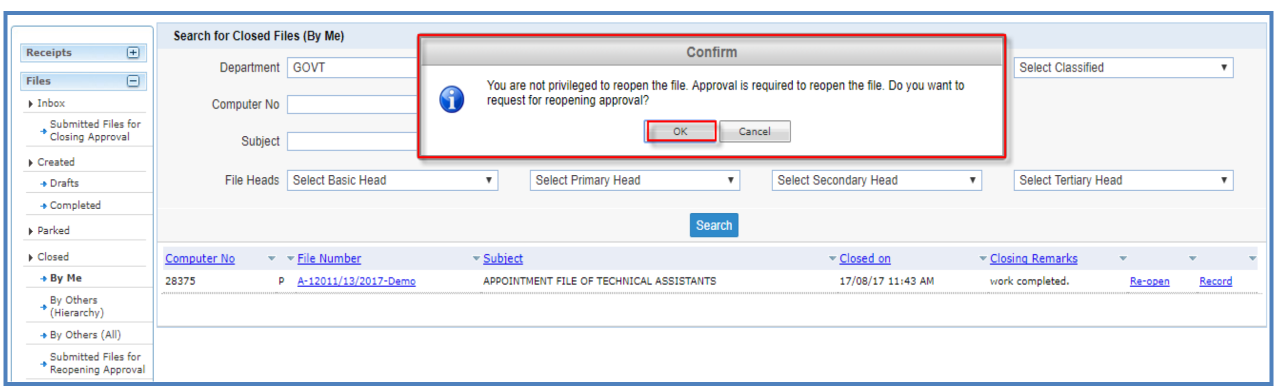


Fig.209

- Sending for Reopening Approval details screen appears. Enter the remarks and click Send button
- A confirmation pop-up appears. Click the OK button as shown in **Fig.210:**

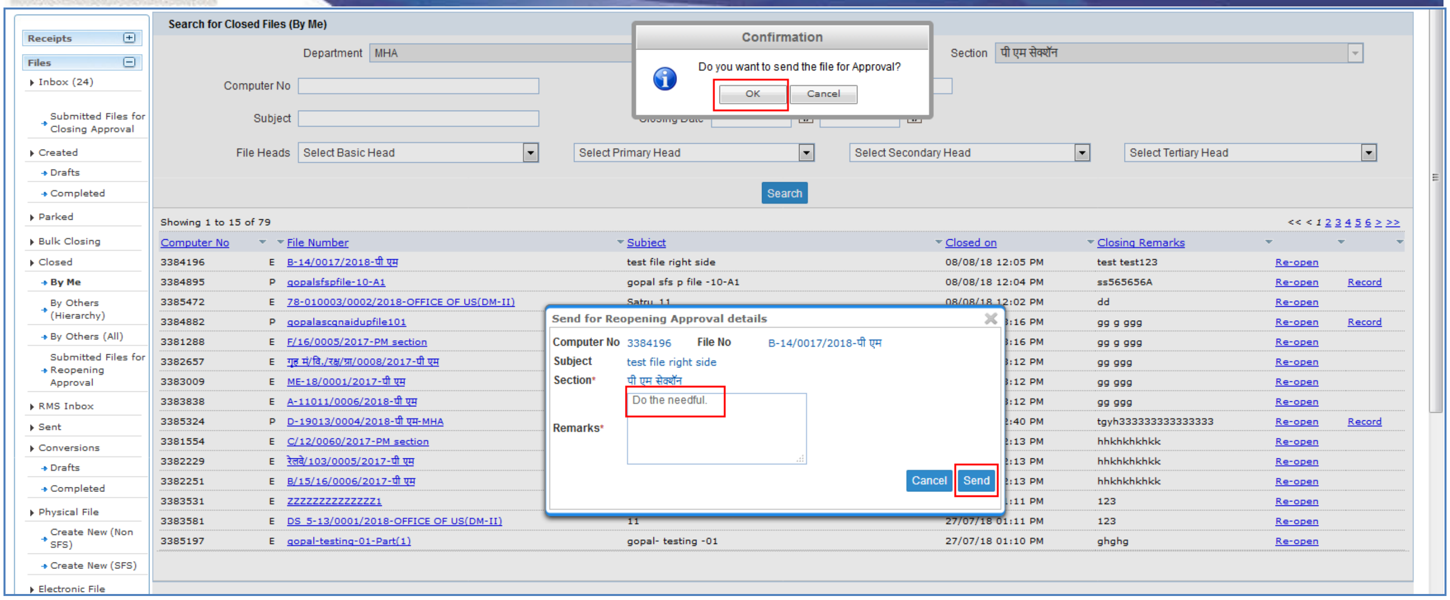


Fig.210

- File(s) which have been submitted for **Reopening** Approval can be viewed under "**Submitted Files for Reopening Approval**" list as shown in **Fig.211**:

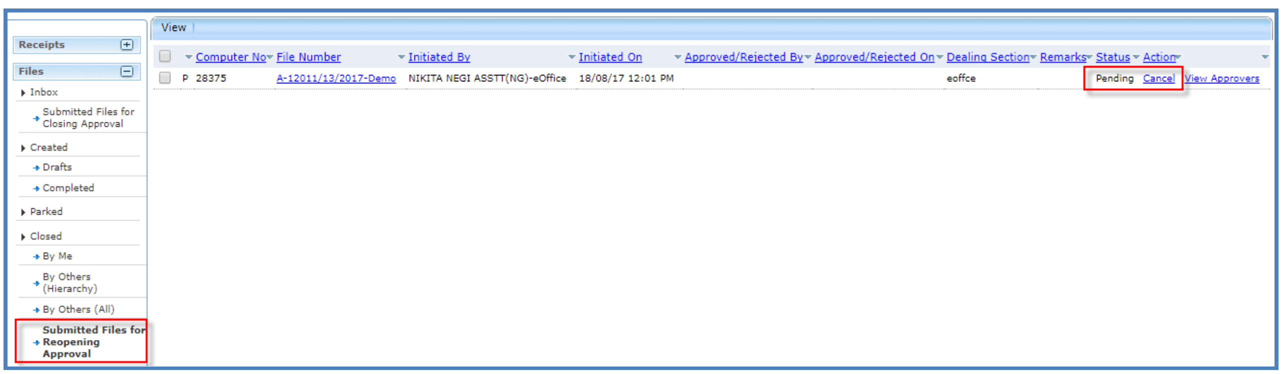


Fig.211

- From "**Status**" column, user can check the **status** of the status of file whether 'Approved/ Pending/ Rejected'.

- From "**Action**" column, user can take three **actions** 'Move to Inbox/ Cancel/ Move to Close' corresponding to Approved, Pending and Rejected.

Note:

The file(s) reopened by the user will be moved to user's File Inbox sub-module.

In case user has approver role, then user can close and re-open the files directly.

RMS Inbox

RMS displays the list of files that are sent from File Management System to Record room till the files are not weeded out as per Record Retention Schedule.

Note:

This feature is utilized only for Physical Files.

Sent

All the file(s) once marked to the intended recipient(s) resides under sent sub-module

Note:

Pull back ( ): It is used to draw back a sent file, which has not been received/ opened by the recipient in his/ her Inbox (**Fig.239**).

Initiate Action : It is used to initiate the process for recording and tracking of actions taken on a file. Refer the Initiate Action link mentioned under File Initiated Action sub-module.

There are 2 action tabs provided under Sent sub-module of File as shown in **Fig.212**:

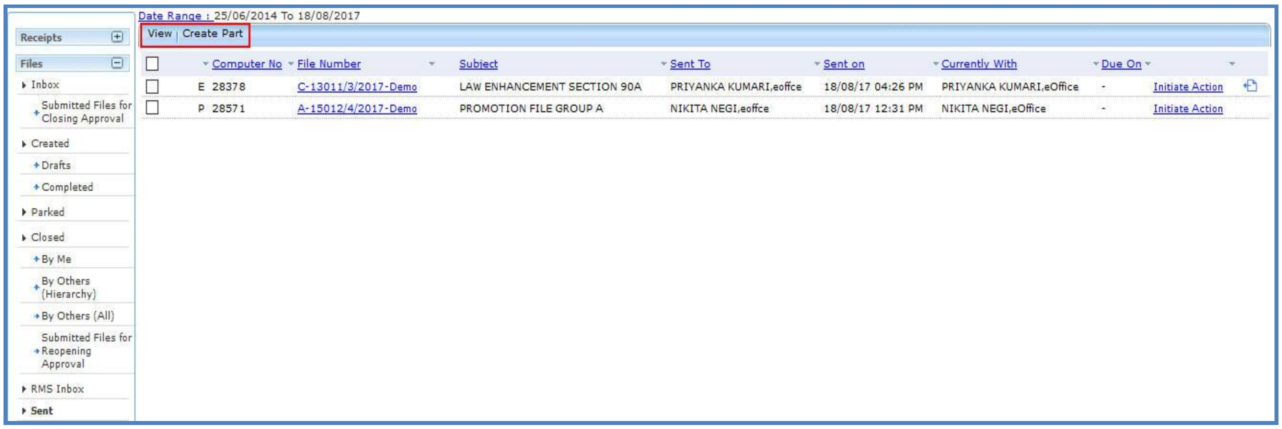


Fig.212

1. **View**: It is used to sort the files based on different criteria such as Physical, Electronic, etc.

Note:

Refer to View action tab of Files Created sub-module.

2. **Create Part**: This option is used to create a Part file of the existing file which is under submission.

Note:

Part file can be created for files which are present with other users.

Refer Create Part sub-module for process.

Conversions

It contains the list of physical files which are either in the process of conversion or are converted already.

Note:

Refer Convert File action in Physical Files for more on conversion process.

The Conversion module contains 2 links:

a) Drafts

b) Completed

Drafts

It contains all the **Physical Files** which are in process of conversion but has not been converted so far. During the Conversion process if users clicks the **Save (** Save **)** button, then files moves under this module.

To complete the process of conversion on a draft, user has to perform the following steps:

- Click **Drafts** under Conversions sub-module, the list of files appears as shown in **Fig.213**:

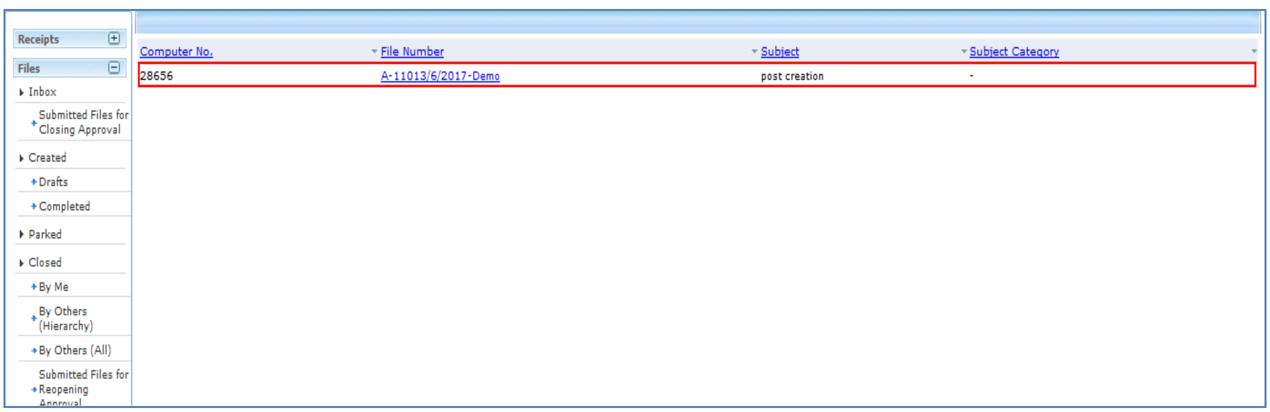


Fig.213

- Click **File Number** in the list, the draft file opens up as shown in **Fig.214**:

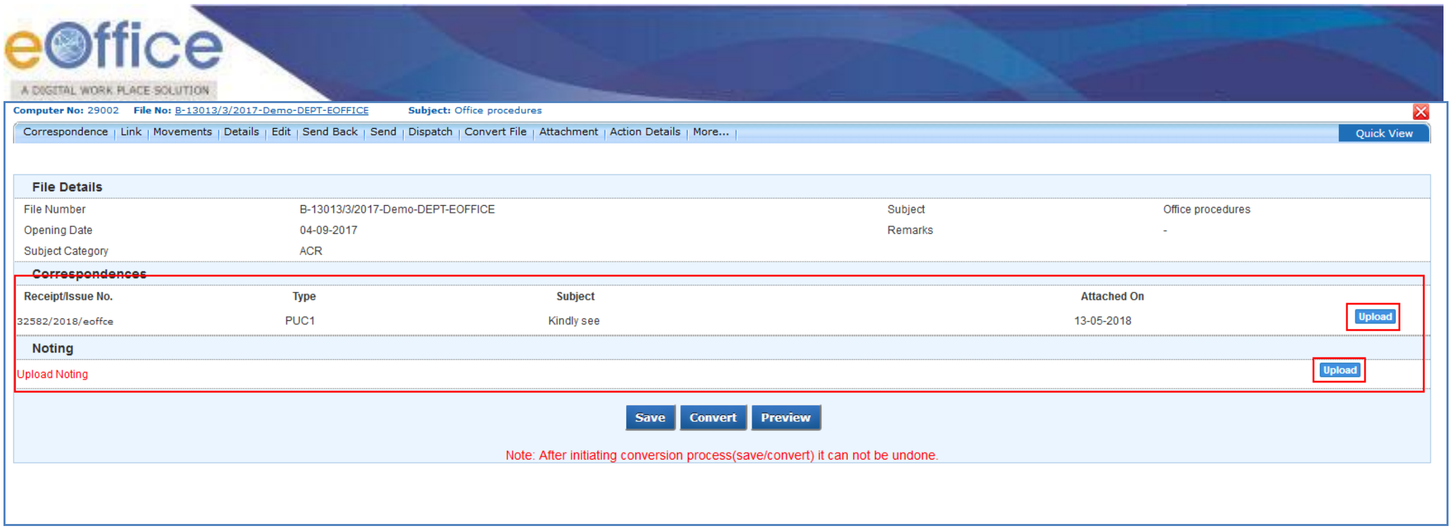


Fig.214

- Under 'Noting' section, upload scanned noting Document of the concerned file if any.

Note:

If any physical receipt has been put inside a Physical File and it does not have PDF uploaded with it, user will have to upload the respective PDF copy before conversion.

- Click **Convert** button in order to complete the file conversion **Fig.215**:

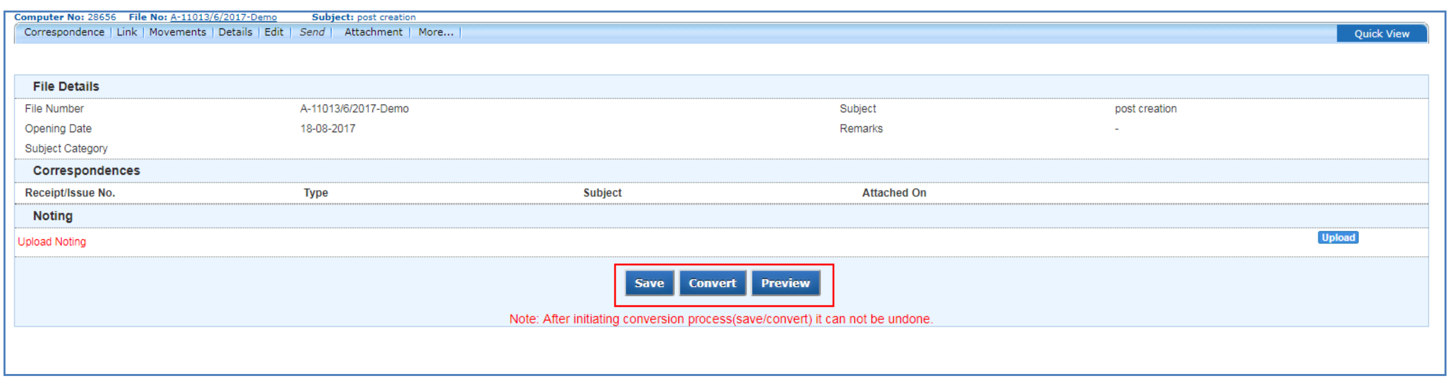


Fig.215

- After conversion, the nature of the file is changed to **Electronic** at its original location.

Completed

This module contains the list of all files which have already been converted from Physical File to Electronic, File as shown in **Fig.216**:

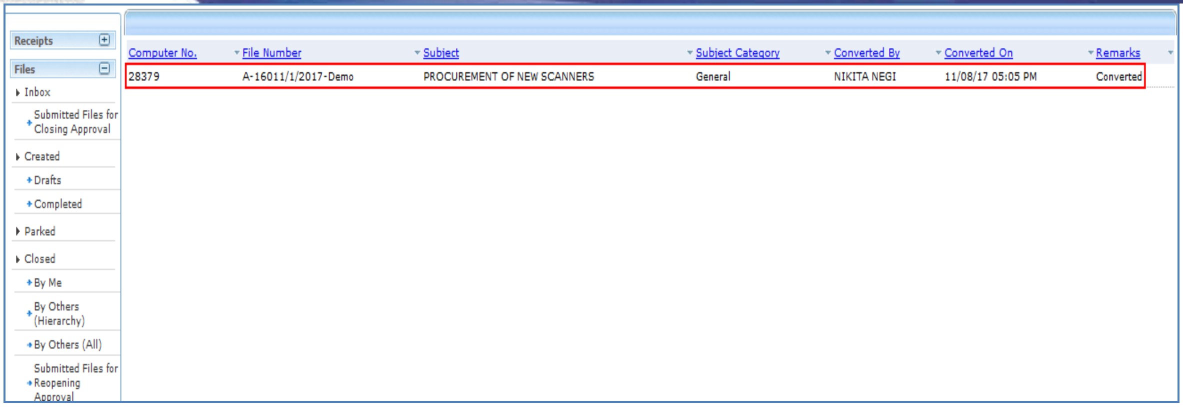


Fig.216

- No action is possible on this list of files.

Physical File Creation

It is used to create a new Physical File.

A new physical file can be created using following options:

1. **Create New (Non-SFS)**
2. **Create New (SFS)**

Create New (Non-SFS):

This option creates a physical file with Non- Single File System (SFS) standard i.e. the user has to select the available file heads for the nomenclature of File.

To create a new Physical File in Non-SFS mode, perform the following:

- Click the **Create New (Non-SFS)** option under **Physical File.**
- The **File Cover Page** screen appears as shown in **Fig.217**:

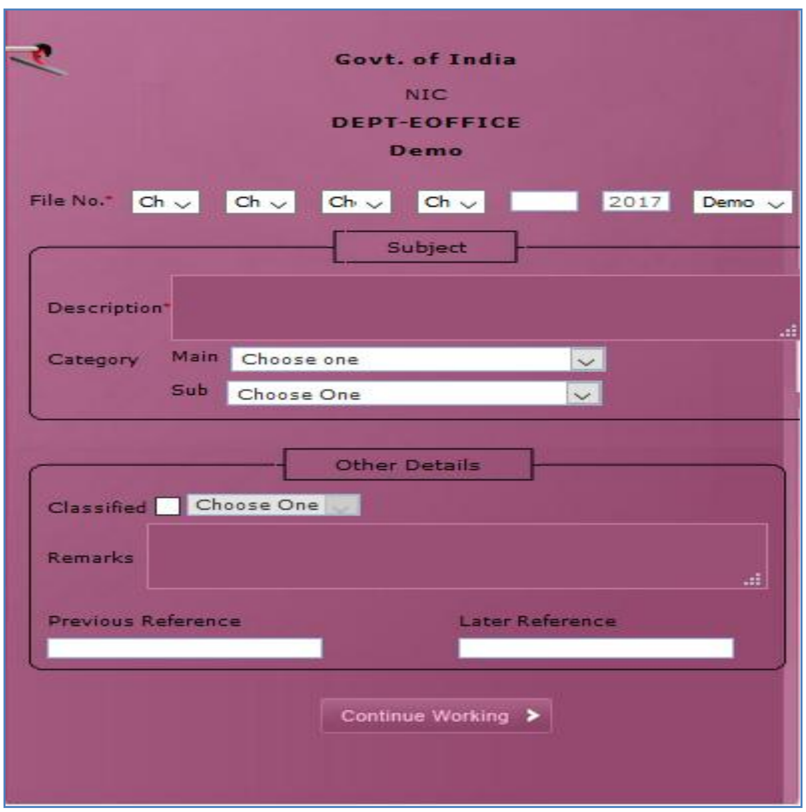


Fig.217

- Enter the necessary details on the File Cover Page and click the Continue Working button as shown in **Fig.218**:

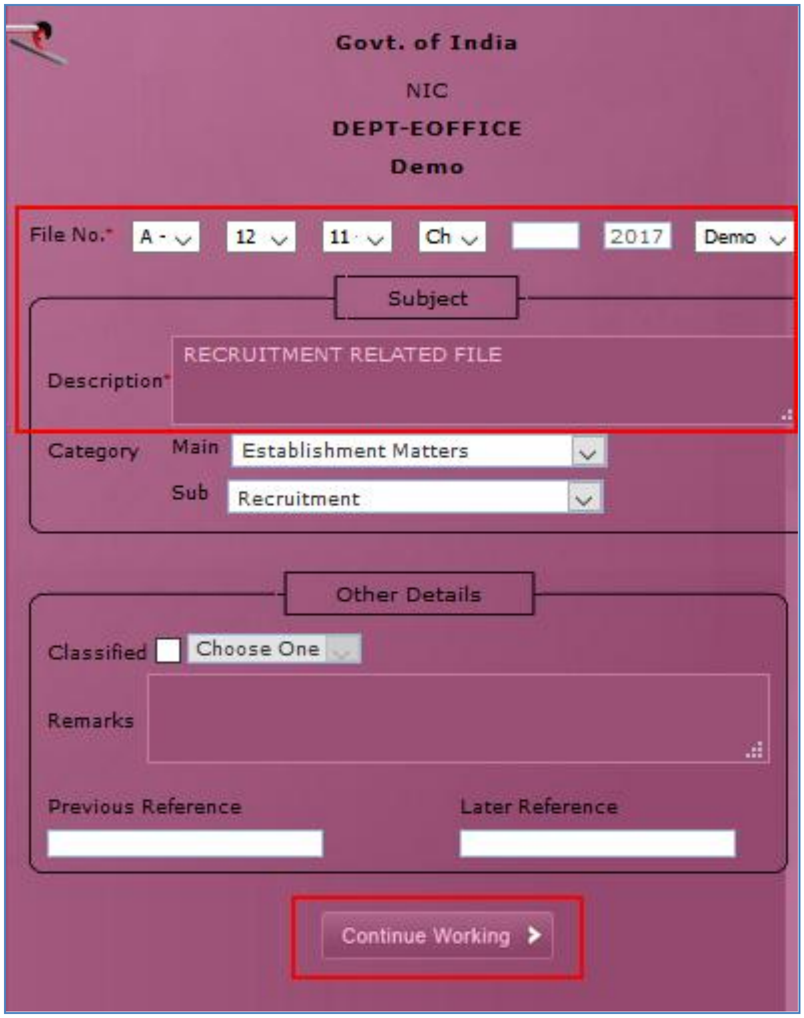


Fig.218

- The file gets created with a unique file number (**Fig.219**) based on the different file heads selected in file creation page.

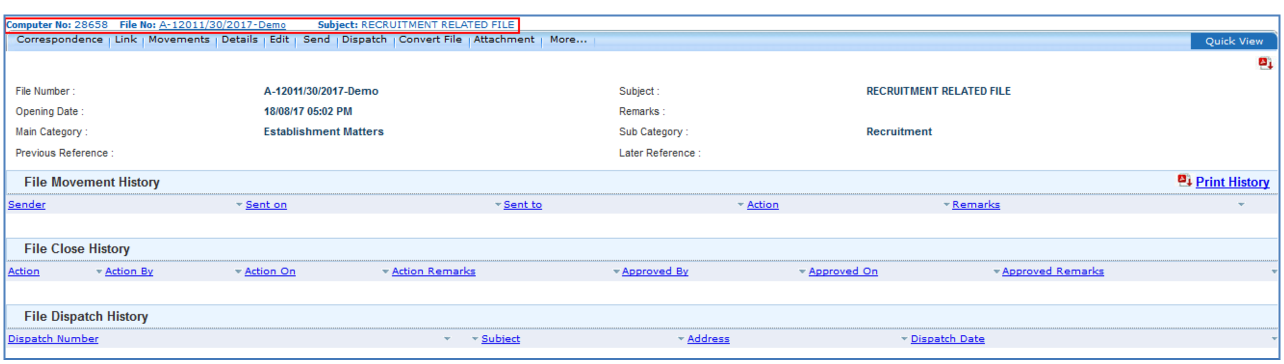


Fig.219

There are 10 different action tabs available on a file after the Physical File is created:

1. **Correspondence**: Correspondence is any paper which is diarized for action to be taken in file. It is used to attach Correspondence/ Receipt to the working File.

Note:

Refer to steps mentioned under Correspondence action tab of File Inbox (Electronic File Action Tabs) sub-module.

2. **Link**: It is used to refer the other active file along with working file. The copy will have all the content of the linked file, upto the moment of linking.

Note:

Refer to steps mentioned under Link action tab of File Inbox (Electronic File Action Tabs) sub-module.

3. **Movements**: This option is used to track the Movements of the file which automatically gets updated as File moves from user to another.
4. **Details**: It can be used to view the details of a File i.e. File cover Page details and total no. of part Files created.

Note:

Refer to Details tab under File Inbox (Electronic File Action Tabs) sub-module.

5. **Edit**: It can be used to make changes to the cover page of existing running file except the File Heads (File Number).

Note:

Refer to steps mentioned under Edit action tab of File Inbox (Electronic File Action Tabs) sub-module.

6. **Send**: This option facilitates the user to mark the file to the intended recipient(s).

Note:

Refer to steps mentioned under Send action tab of File Inbox sub-module.

7. **Dispatch**: It is a process of issuing an official reply to the concerned user/department/ministry after the approval from the internal competent authority.

Note:

Refer to Dispatch tab under File Inbox (Physical File Action Tabs) sub-module.

8. **Convert File**: It is used to convert the Physical File to Electronic File, irrespective of the File location, i.e. whether it is attached with a receipt or from the File Inbox/Created sub-module.

Note:

Refer to Convert File tab under File Inbox (Physical File Action Tabs) sub-module.

9. **Attachment**: It is used to attach the File or Receipt on working File.

Note:

Refer to steps mentioned under Attachment action tab of File Inbox (Electronic File Action Tabs) sub-module.

10. **More**: It is used to Close and Park the active file, check closing/parking history, to create volume, Merge Files and to view Merge Details.

Note:

Refer to More tab under File Inbox (Physical File Action Tabs) sub-module.

Create New (SFS):

This option creates a physical file with SFS standard i.e. the user can enter File No. without any restriction or standards.

To create a new Physical File in Non-SFS mode, perform the following:

- Click the **Create New (SFS)** option under **Physical File** sub-module**.**
- The File Cover Page screen appears as shown in **Fig.220**:

Fig.220

- Enter the necessary details on the File Cover Page and click  button, as shown in **Fig.221**:

Fig.221

- The file gets created, as shown in **Fig.222**:

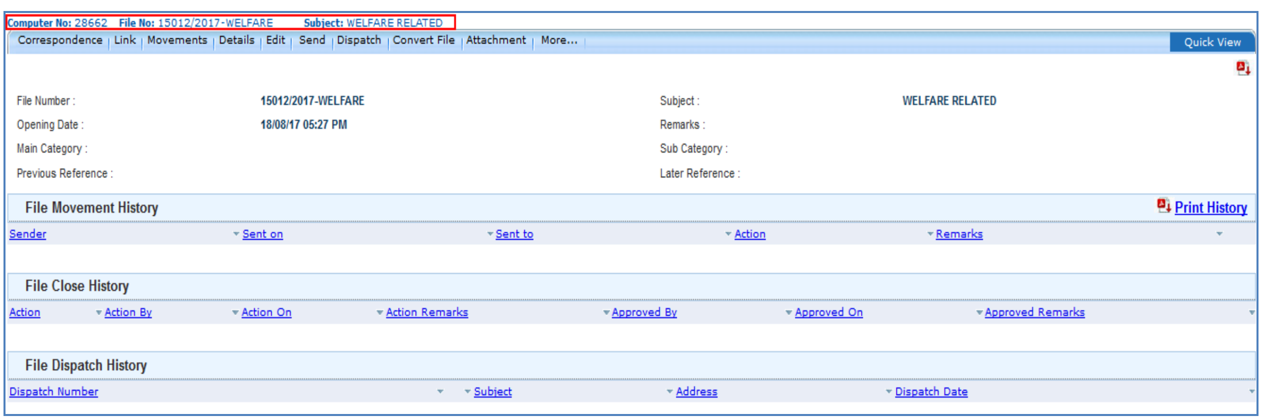


Fig.222

Note:

User can perform same operations on a file as explained in Create Non-SFS file.

Electronic Files Creation

It is used to create an **Electronic File**.

Electronic File Link Contains 2 options:

1. **Create New (Non-SFS)**
2. **Create New (SFS)**

Create New (Non-SFS):

This option creates an Electronic file with Non-SFS standard i.e. the user has to select the available heads for the nomenclature of File.

To create a New File, perform the following steps:

- Click the **Create New (Non-SFS)** option from the Left navigation panel under the **Electronic File** Sub-module
- The **File Cover Page** screen appears as shown in **Fig.223:**

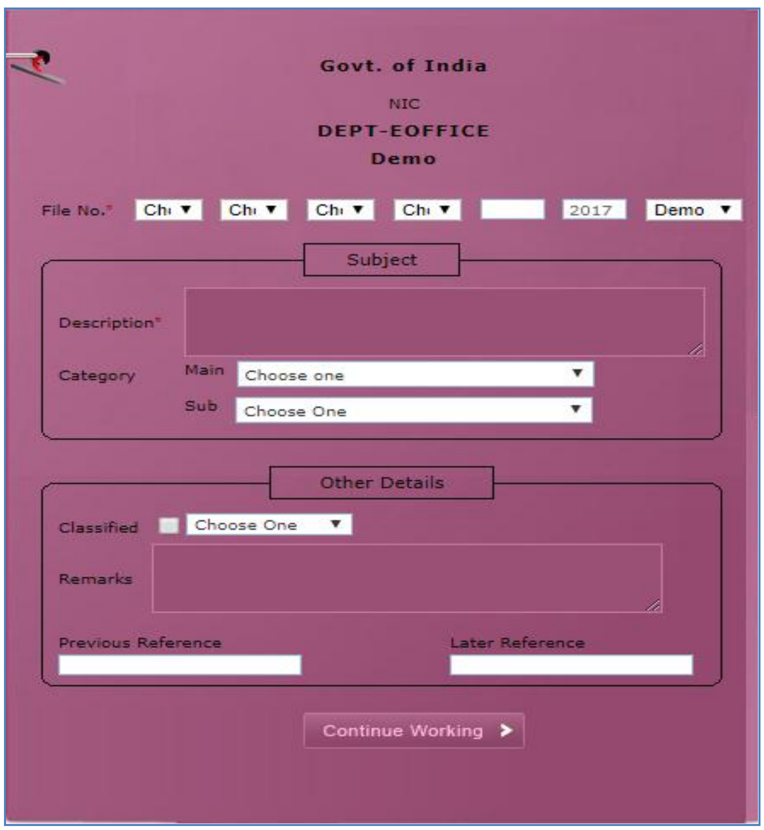


Fig.223

- Enter the necessary details on the File Cover Page and click Continue Working button to create a new electronic file as shown in **Fig.224**:

Fig.224

- The file gets created, along with a unique file number based on the selection of heads, as shown in **Fig.225:**

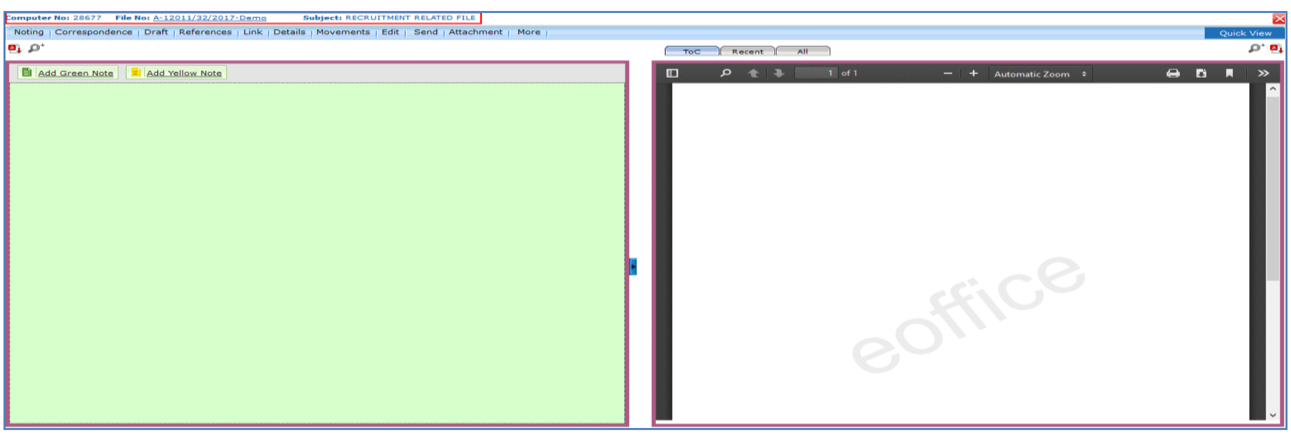


Fig.225

There are 11 different action tabs available on a file after the Electronic File is created:

1. **Noting**: It is consists of line actions with regard to the correspondence or as per the subject matter of the file subject. It is used to add Yellow Note and Green Note in the existing File and to view the noting By Name and By Date or All the noting together.

Note:

Refer to Noting tab under File Inbox (Electronic File Action Tabs) sub-module.

2. **Correspondence**: Correspondence is any paper which is diarized for action to be taken in file. It is used to attach Correspondence/ Receipt to the working File.

Note:

Refer to Correspondence tab under File Inbox (Electronic File Action Tabs) sub-module.

3. **Draft**: It is a process of creating an official reply to the concerned user/department/ministry conveying the views or orders of the department. With the help of this feature user can Create New Draft and View Existing Drafts in the File.

Note:

Refer to Draft tab under File Inbox (Electronic File Action Tabs) sub-module.

4. **Reference:** These are document to support noting. It is used to attach references corresponding to the working file.

Note:

Refer to References tab under File Inbox (Electronic File Action Tabs) sub-module.

5. **Link**: It is used to refer the other active file along with working file. The copy will have all the content of the linked file, upto the moment of linking.

Note:

Refer to Link under File Inbox (Electronic File Action Tabs) sub-module.

6. **Details**: It can be used to view the details of a File i.e. File cover Page details and total no. of part Files created.

Note:

Refer to Details tab under File Inbox (Electronic File Action Tabs) sub-module.

7. **Movements**: This option is used to track the Movements of the file which automatically gets updated as File moves from user to another.
8. **Edit**: It can be used to make changes to the cover page of existing running file except the File Heads (File Number).

Note:

Refer to Edit tab under File Inbox (Electronic File Action Tabs) sub-module.

9. **Send**: This option facilitates the user to mark the file to the intended recipient(s).

Note:

Refer to steps mentioned under Send action tab of File Inbox sub-module.

10. **Attachment**: It is used to attach the File or Receipt on working File.

Note:

Refer to Attachment tab under File Inbox (Electronic File Action Tabs) sub-module.

11. **More**: It is used to close and Park the active file, check closing/parking history and merge details.

Note:

Refer to More tab under File Inbox (Electronic File Action Tabs) sub-module.

Create New (SFS):

This option creates an **Electronic** file with **SFS** standard i.e. the user can enter File No. without any restriction or standards.

To create a New File in SFS mode, perform the following steps:

- Click the **Create New (SFS)** option under Electronic File sub-module.
- The File Cover Page screen appears as shown in **Fig.226:**

Fig.226

- Enter the necessary details on the File Cover Page and click 

 button, as shown in **Fig.227**:

Fig.227

- The file gets created, as shown in **Fig.228**:

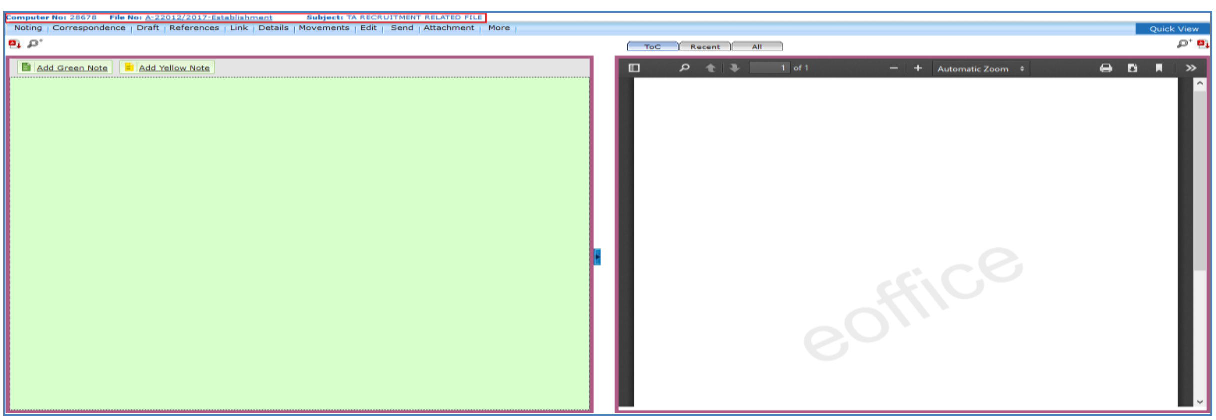


Fig.228

Note:

User can perform same operations on a file as explained in [Create Non-SFS]() file of the Electronic File Section.

Create Part

It is used to create a part file when the main file is under submission i.e. not residing with the working user.

To create a part file, perform the following steps:

- Click the **Create Part** under the Files Section, the screen as shown in**Fig.229** appears:

Fig.229

- Click Browse File button, list of files appears.

- Select the file for which a part file has to be created and click Select File button, as shown in **Fig.230**:

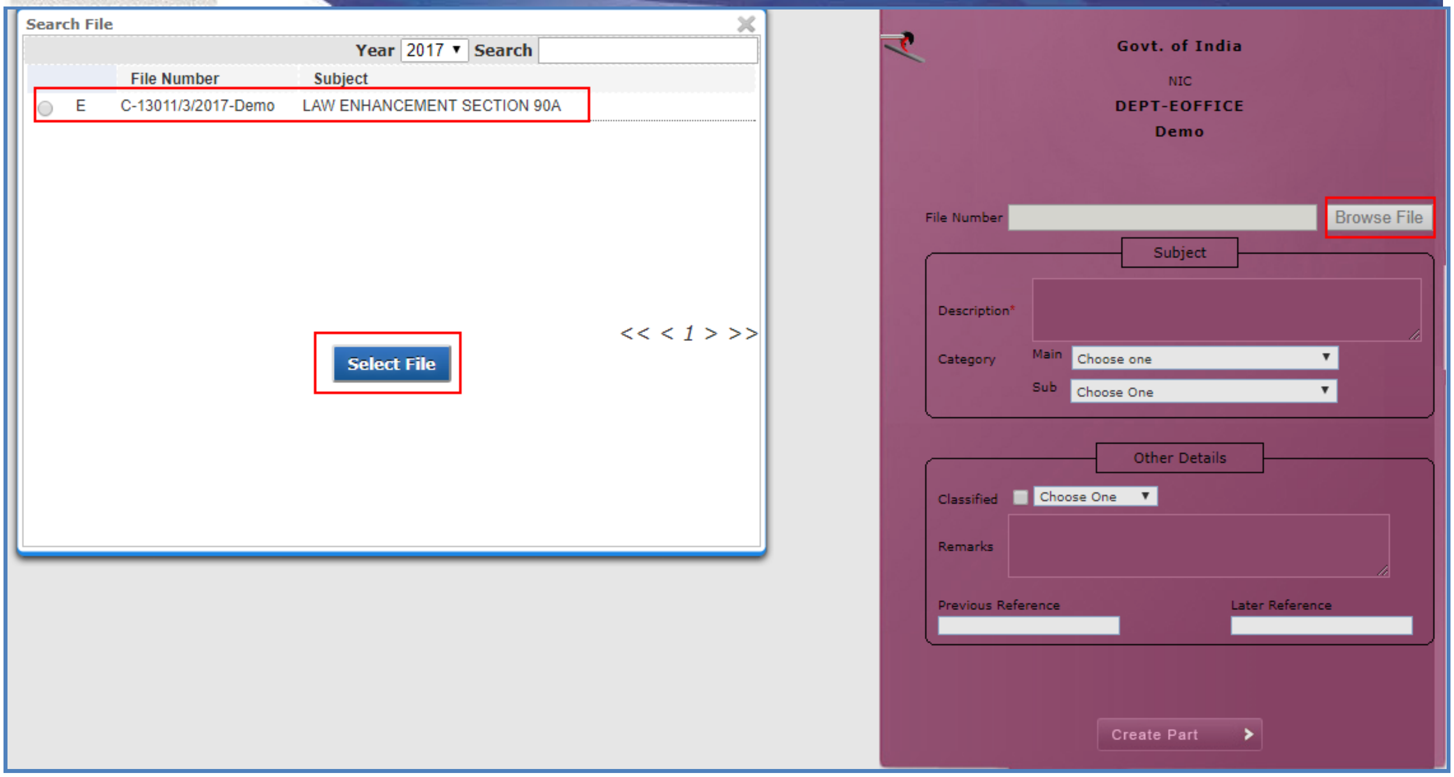


Fig.230

Note:

List contains the files which are sent by user and currently with other users.

- Then click  button to as shown in **Fig.231:**

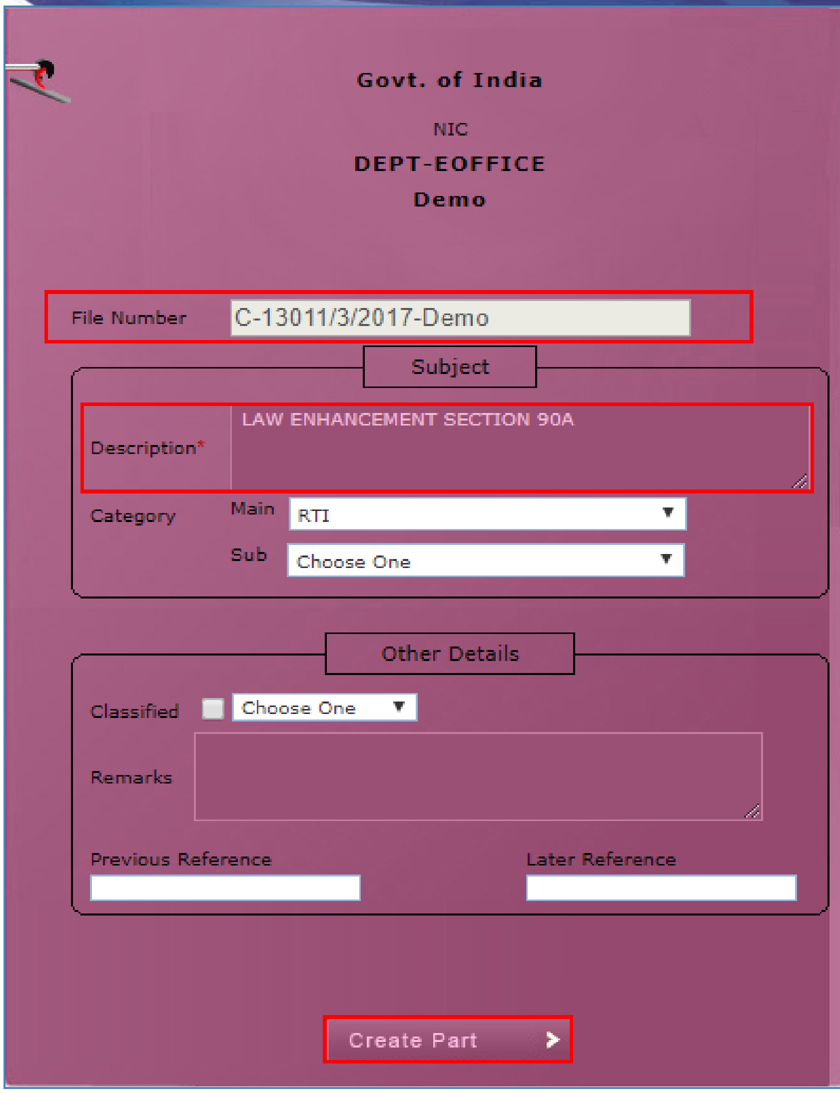


Fig.231

- The part file is created as shown in **Fig.232**:

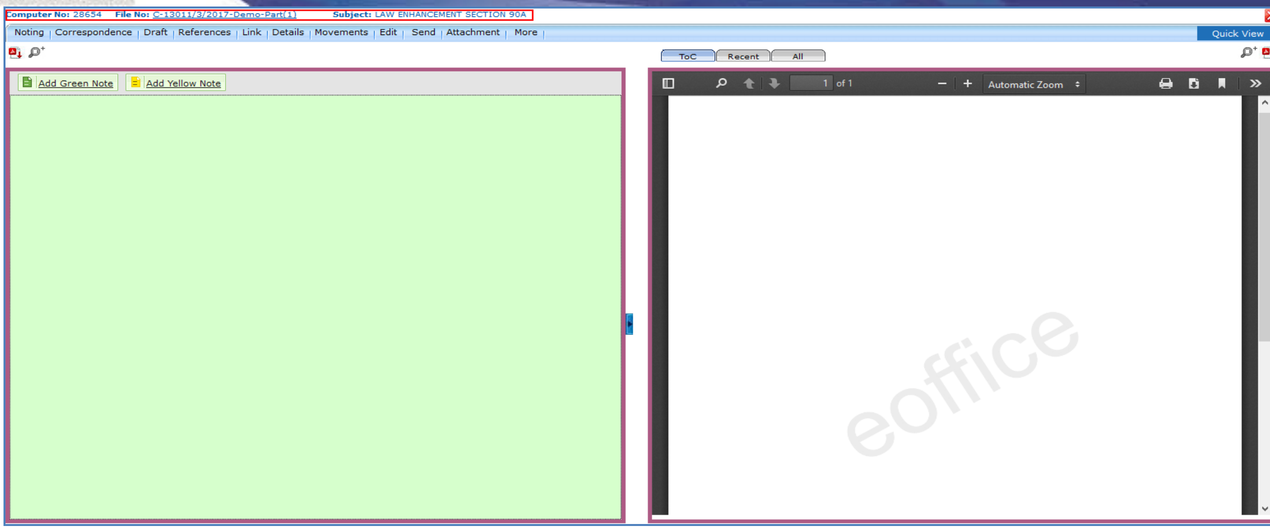


Fig.232

Note:

Create Part file can be accessed from completed files list under **Created** module.

Part file can be created for both physical and electronic file.

Create Volume

When the main file becomes bulky the Create Volume option allows the user to create a new volume of an existing file. Further papers on the subject will be added to the new volume of the same file, which will be marked `Volume II", and so on.

To create a Volume of a file, perform the following steps:

- Click the **Create Volume** link under the **File** sub-module. The screen appears is shown in **Fig.233**:

Fig.233

- Click Browse File button, a list of File appears.
- Select the file for which a volume has to be created and click Select File button, as shown in **Fig.234:**

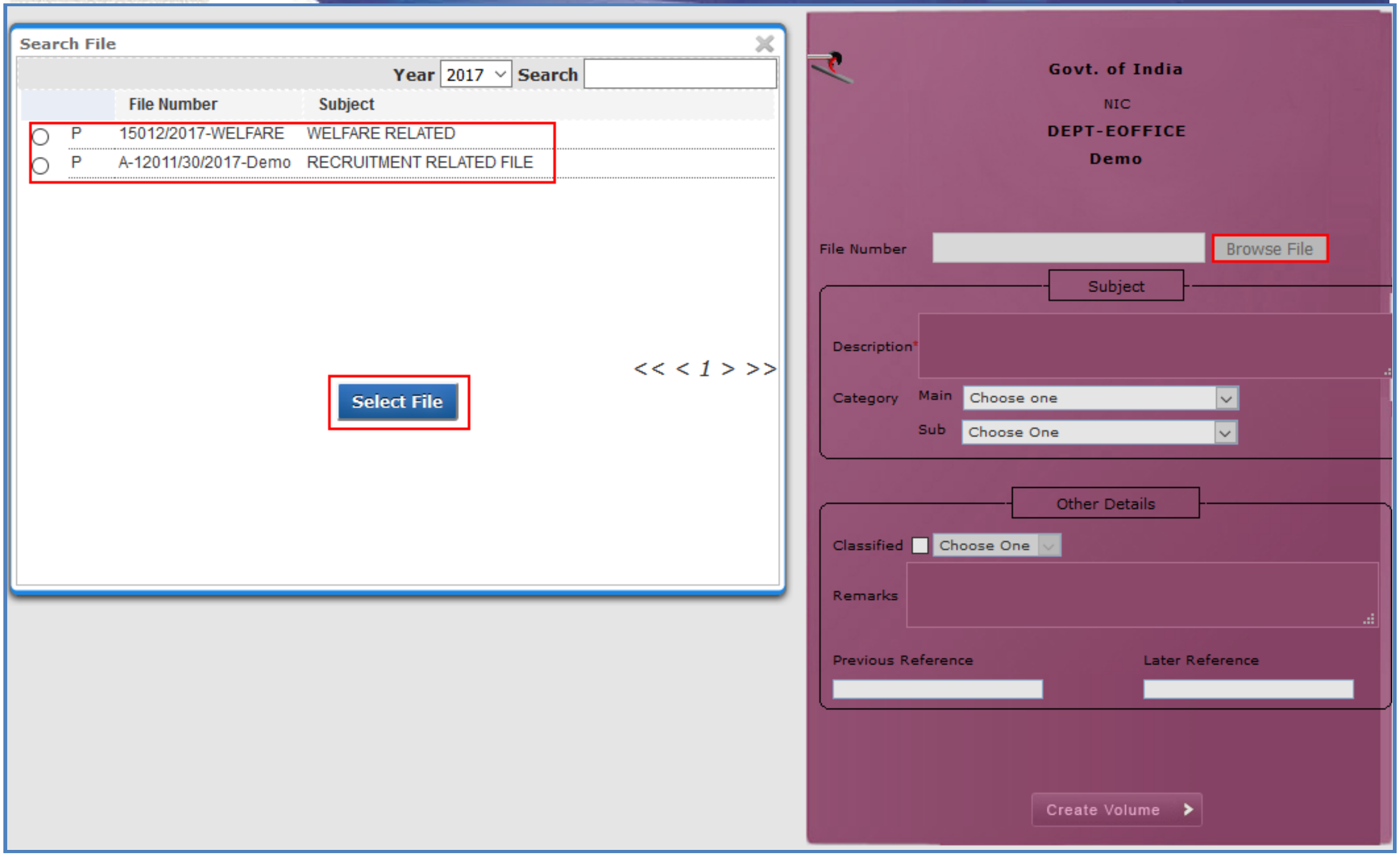


Fig.234

Note:

The list contains the files residing in user's File Inbox sub-module.

- Click the 

button to create a Volume; as shown in **Fig.235**:

Fig.235

- The volume of a file is created as shown in **Fig.236**:

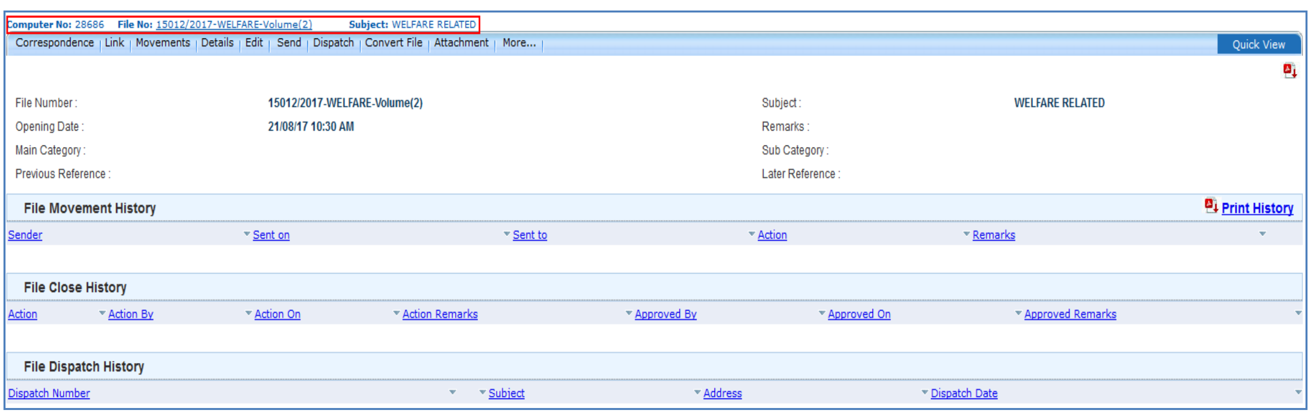


Fig.236

Note:

The volume of a file can be created for physical files only.

Initiated Action

By using this feature Privileged user will be able to **initiate** and **track** the set of actions taken on a file.

- User can view the list of files with **Action Details** as shown in **Fig.237**:

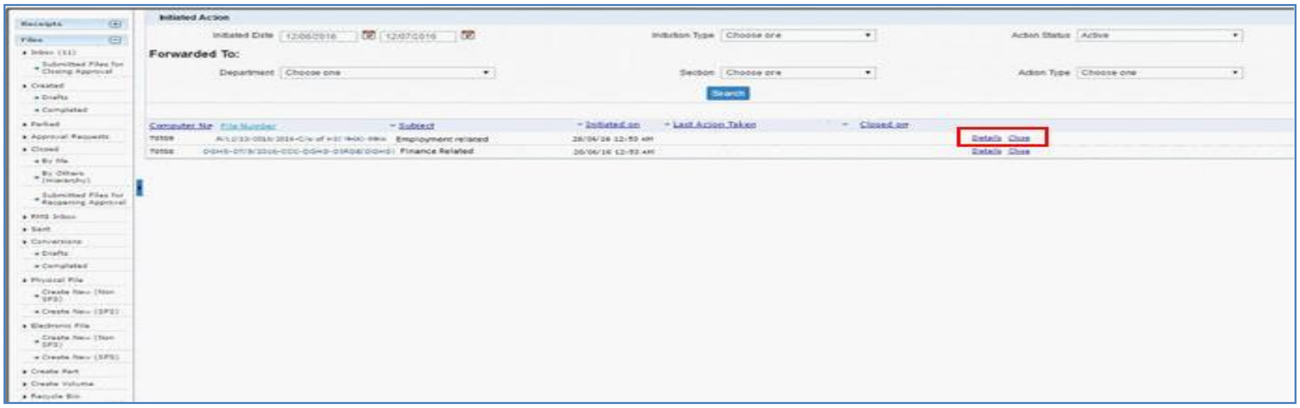


Fig.237

Two options are available to take an action:

1. **Details**: User can view the action details through this link adjacent to each file, as shown in **Fig.238**:

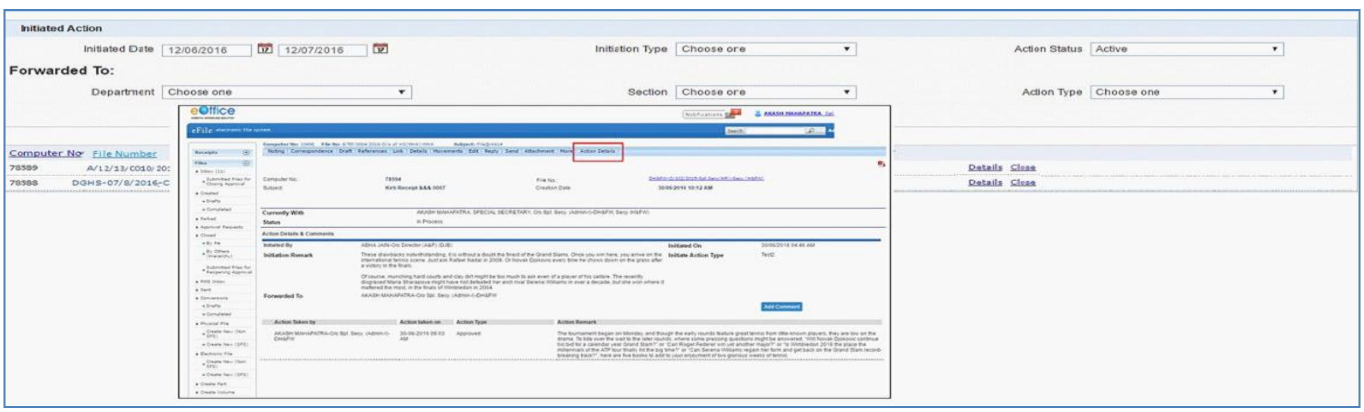


Fig.238

2. **Close**: User can close the initiated action using "**Close"** link.

> Note:
> Closing can be done by anyone in the section having role to initiate the action.

- Click Close link, enter the closing confirmation Remarks, as shown in **Fig.239**:

Fig.239

The File can be marked action from:

a) Send screen (Sending the File):

The user would be able to initiate the action by using the following fields.

- Check the **Initiate Action** check-Box. The remarks field becomes mandatory as soon as the "**Initiate Action**" check box is selected, as shown in **Fig.240**:

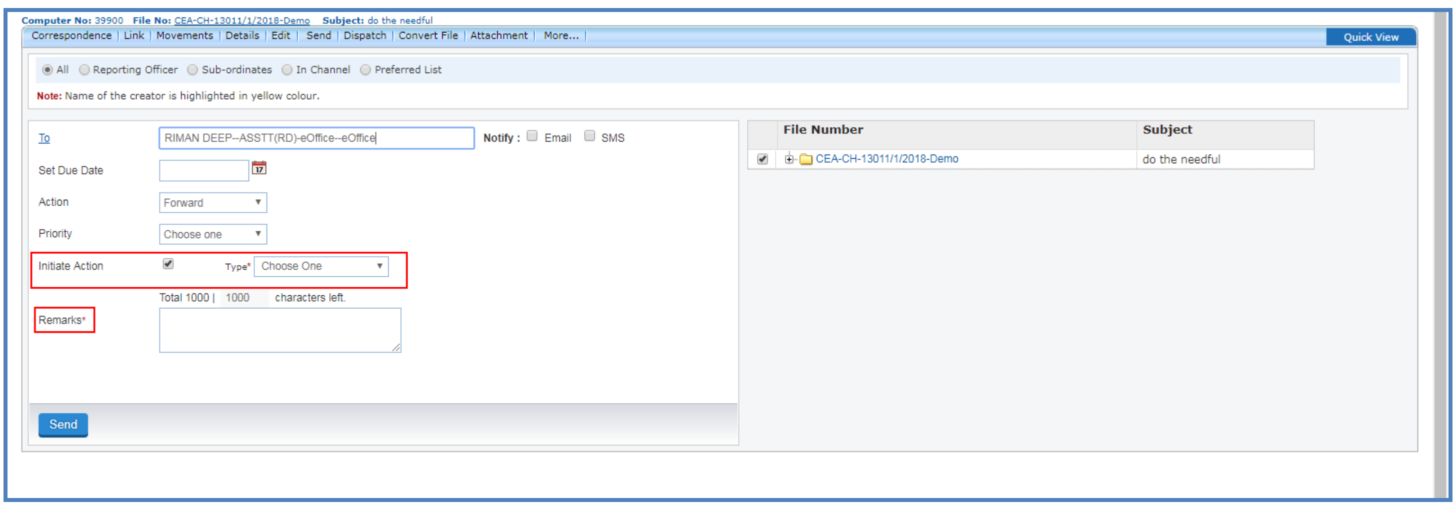


Fig.240

b) From Sent sub-module page:

Initiate Action

- At the file sent page, the link of "**Initiate Action**" is available against every file, as shown as shown in **Fig.241**:

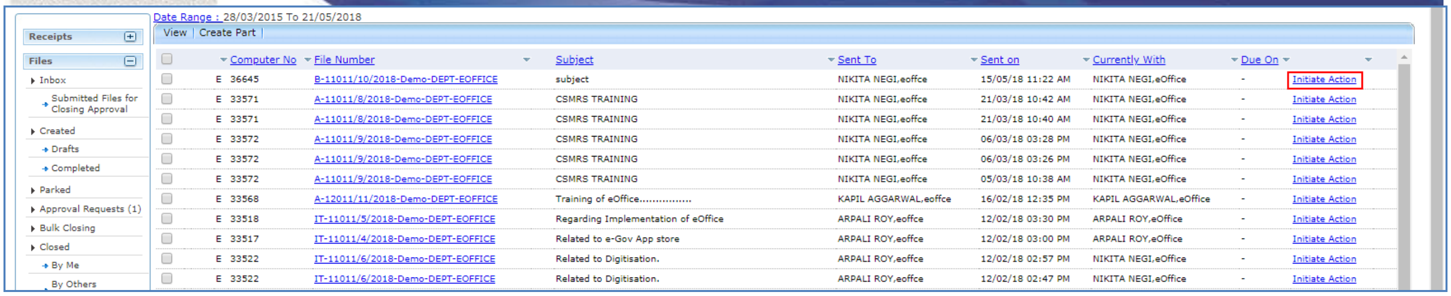


Fig.241

- Click Initiate Action link. A File initiation confirmation pop-up window appears.
- Enter the action **Type** and **Remarks** and click OK button, as shown in **Fig.242**:

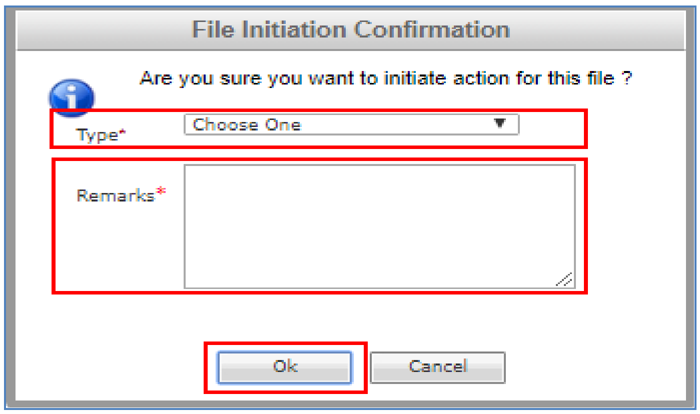


Fig.242

Note:

Action Details will not be displayed in case file is forwarded from one department to another, having different instances (Interdepartmental Case).

In case of single instance having multiple departments, Action Details will be displayed in case file is forwarded from one department to another.

Action details will be available for linked files also (Linked files section in the file inner page).

c) **Viewing & Adding Action Comment**:

From File Inbox inner page:

- To add remarks click Add Comment button (available along with the active action) in the "**Action Details**" page, as shown in **Fig.243**:

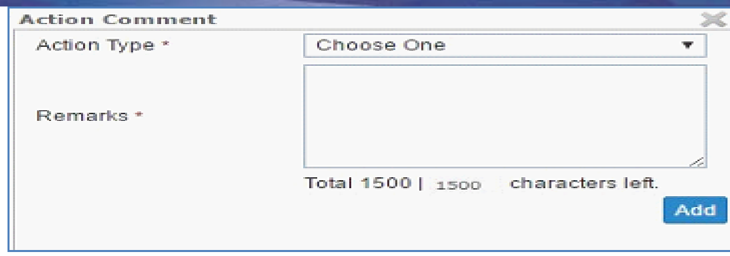


Fig.243

- Provide the necessary action type and click the Add button to add the remarks for the action.

Settings

It is used to change the preferences/settings in application. The sub-modules under setting module are shown in **Fig.244**:

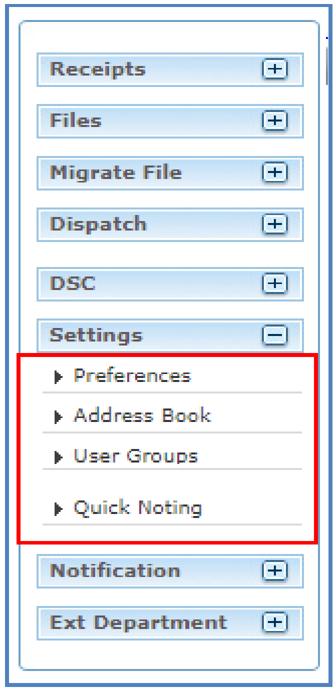


Fig.244

Preferences

This module facilitates the user to change the general preferences and customize the application as per user requirement as shown in **Fig.245**:

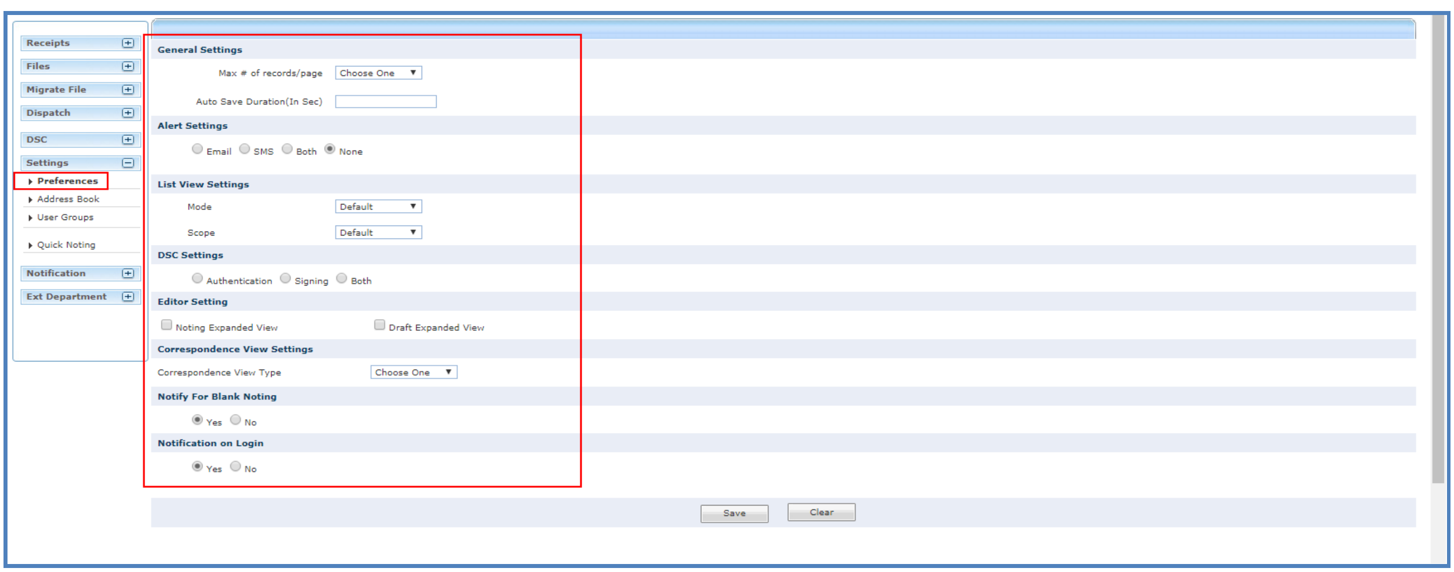


Fig.245

Preferences sub-module is divided into following sections:

1. **General Settings**: To modify the General Settings:
    a. **Max # of records/page**: It refers to numbers of records that can be listed in a page.
    b. **Auto Save Duration**: It allows the user to save the note in defined time.
2. **Alert Settings**: To receive alerts on **Mobile**, **Email**, **Both** or **None** to not receive the alerts..

Note:

Email and mobile number are not editable and are mapped through EMD.

3. **List View Settings**: To change the default view mode or scope mode of Files/Receipts.
    a. **Mode**: User can set it to **Electronic view, physical view** or Default view which comprises of both.
    b. **Scope**: User can set it to **My Folder view** or **section view**.
4. **DSC Settings**: To set DSC authentication at time of **login**, **singing** or **Both**.
5. **Editor Setting**: To set the expanded view of Noting or Draft content.
6. **Correspondence View Setting**: To set the correspondence view **toc (List of issues)** or **pdf**.
7. **Notify for Blank Noting**: A notification pop-up appears while sending a file with blank note.
8. **Notifications on Login**: To get Notification pop-up window (containing **pull-up, pull back** and **due date elapsed**) notification when logged into eFile application.

- Make the required changes and click Save button to save the preferences.

Address Book

It is used to add new contact/user and to create the groups. It helps the user while diarizing of a letter/ DAK.

To add users to the address book, perform the following steps:

- Click the Add New Contact button, as shown in **Fig.246**:

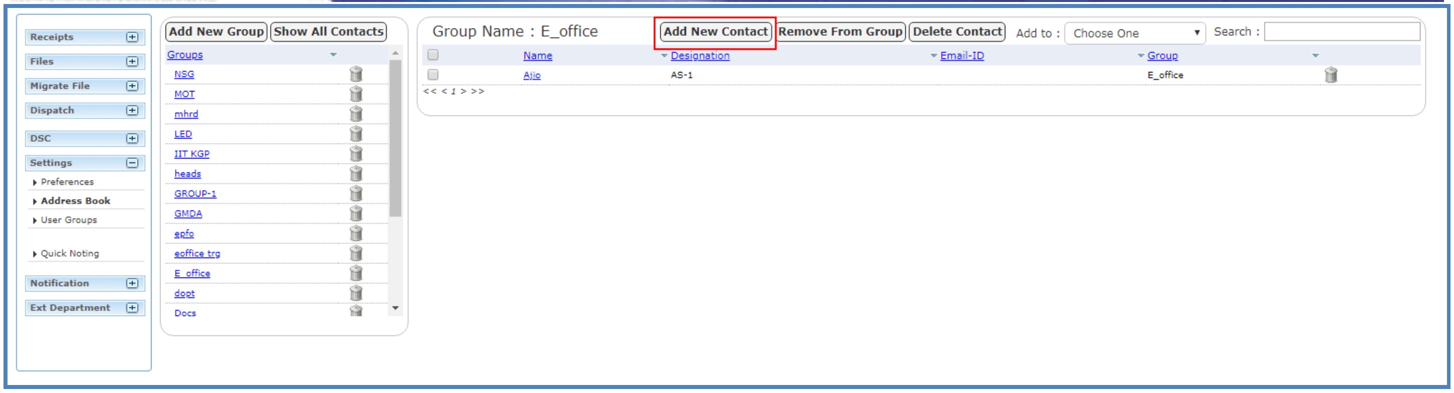


Fig.246

- The user info page appears. Fill the required metadata and click Save button, as shown in **Fig.247**:

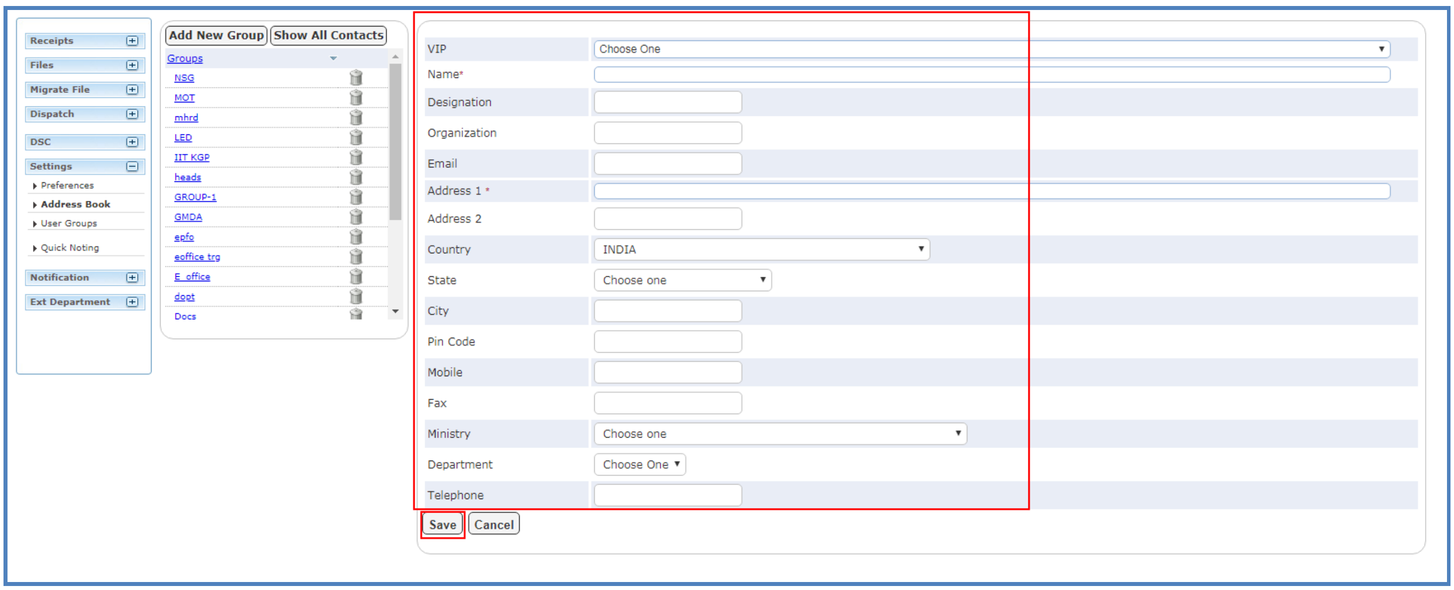


Fig.247

Note:

Adding VIP contact is role based, user having role 'ROLE_VIP_ADMIN' can add the VIP users.

- The contact is added in address book.
- User can also add the contact from diary screen. Enter the contact details and check the Add to Address Book check box, as shown in **Fig.248:**

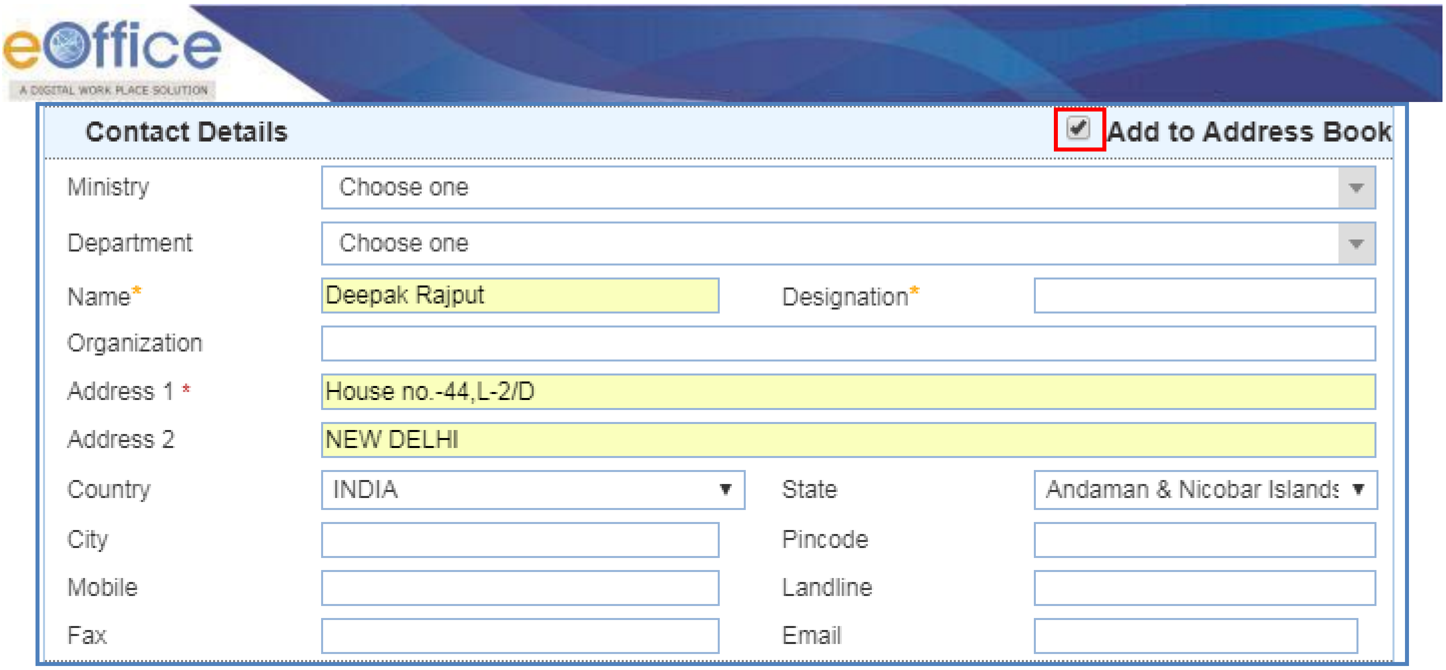


Fig.248

- Then, click **Generate** & **Generate & Send** button.

To create Group in Address Book, perform the following steps:

- Click the **Address Book** sub-module under **Settings** module. The window appears is shown in **Fig.249:**

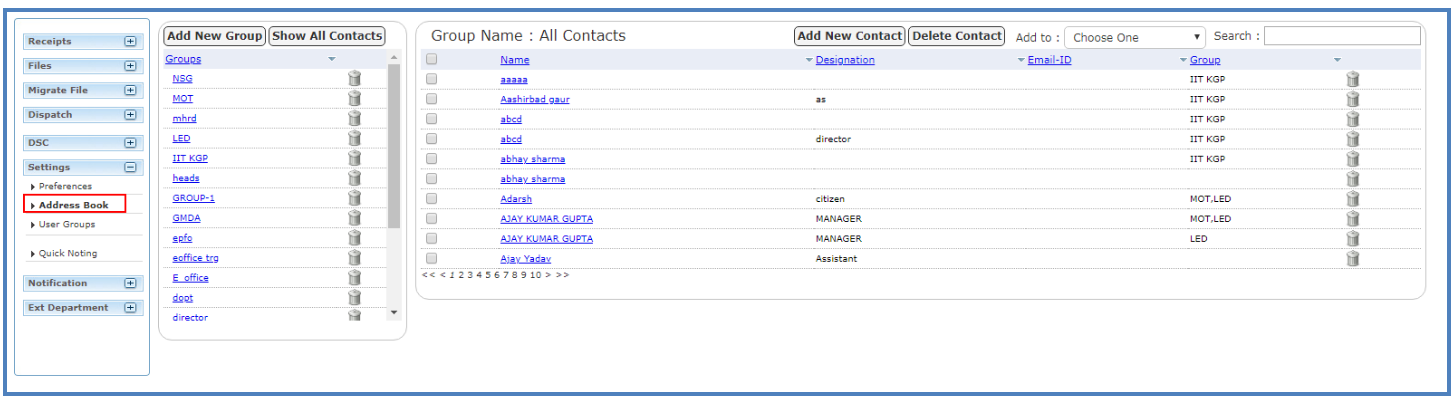


Fig.249

- Click **Add New Group** button, enter the Group name and click **Save** button, as shown in **Fig.250**:

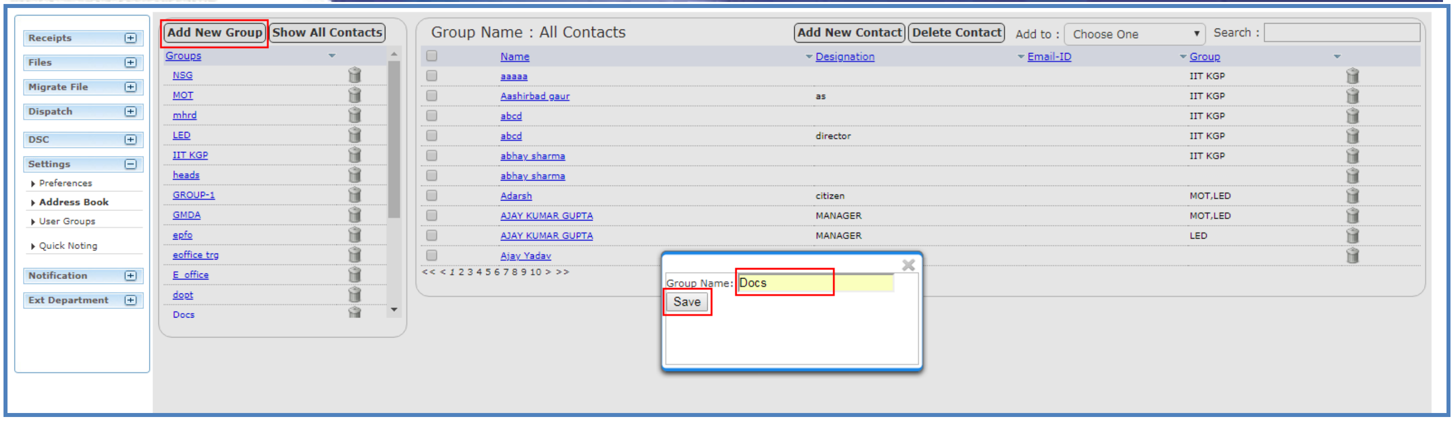


Fig.250

- A new group gets created.

Other actions available on Address book screen are:

1. **Show All Contacts**: To view the complete list of contacts.
2. : To delete the any particular group or contact.
3. **Delete Contact**: To delete the multiple contacts.

User Groups

It is used to create a group and add user list to that created group. It helps the user while sending a Receipt/File to list of selected users or to a group which comprises of contained user list.

To create User Group, perform the following steps:

- Click the **User Groups** sub-module under **Settings** module. The window appears is shown in **Fig.251:**

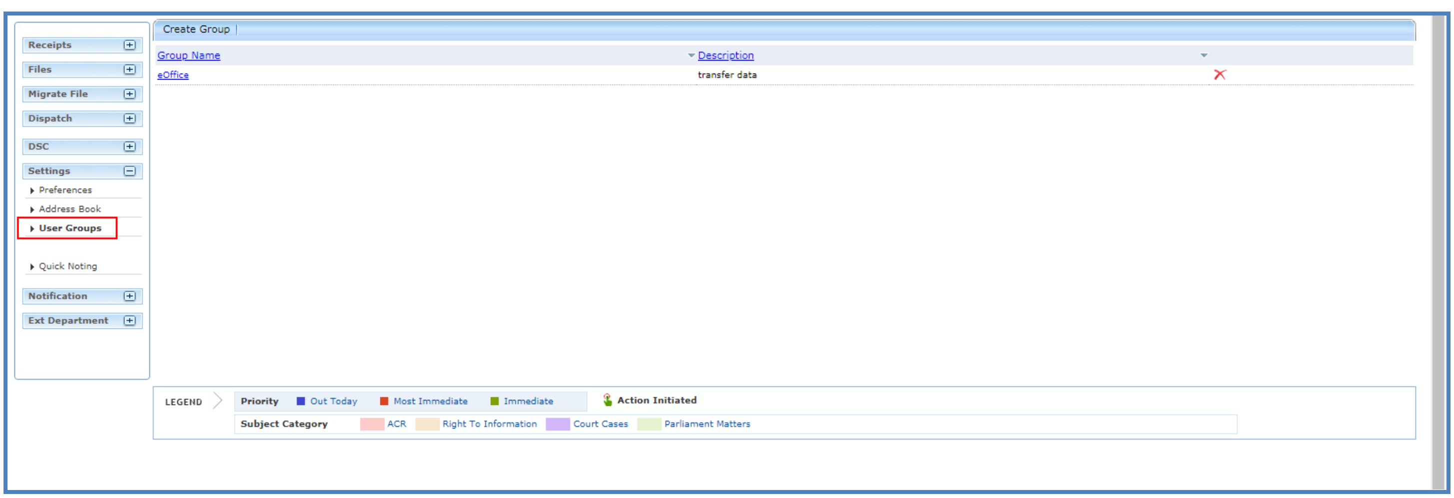


Fig.251

- Click Create Group tab, enter the Group name, Description and click Create button, as shown in **Fig.252**:

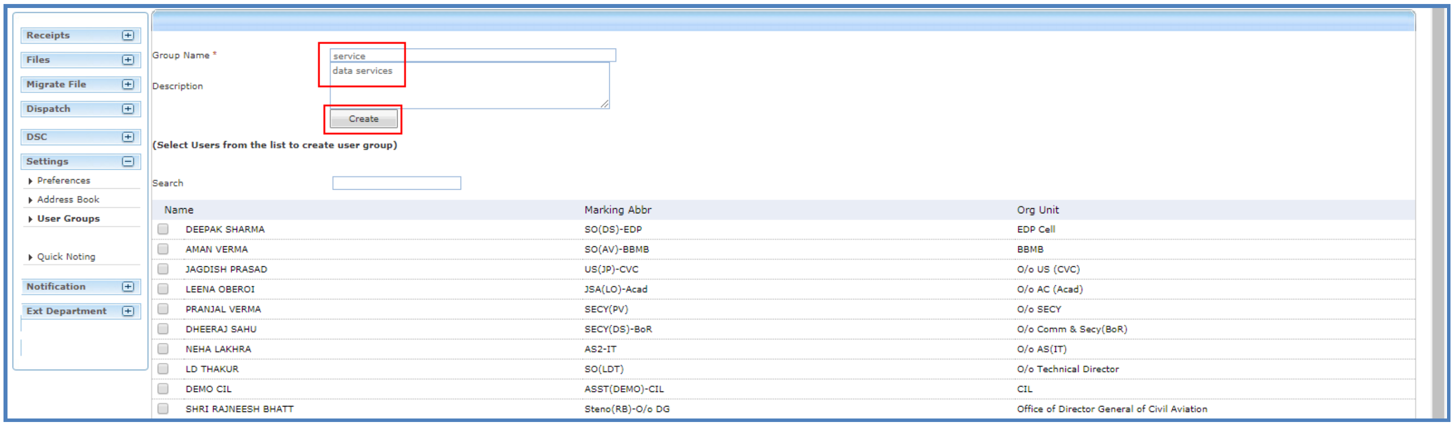


Fig.252

- A new group gets created.

To add users to the created group, perform the following steps:

- Click the group name in which user required to be added, as shown in **Fig.253:**

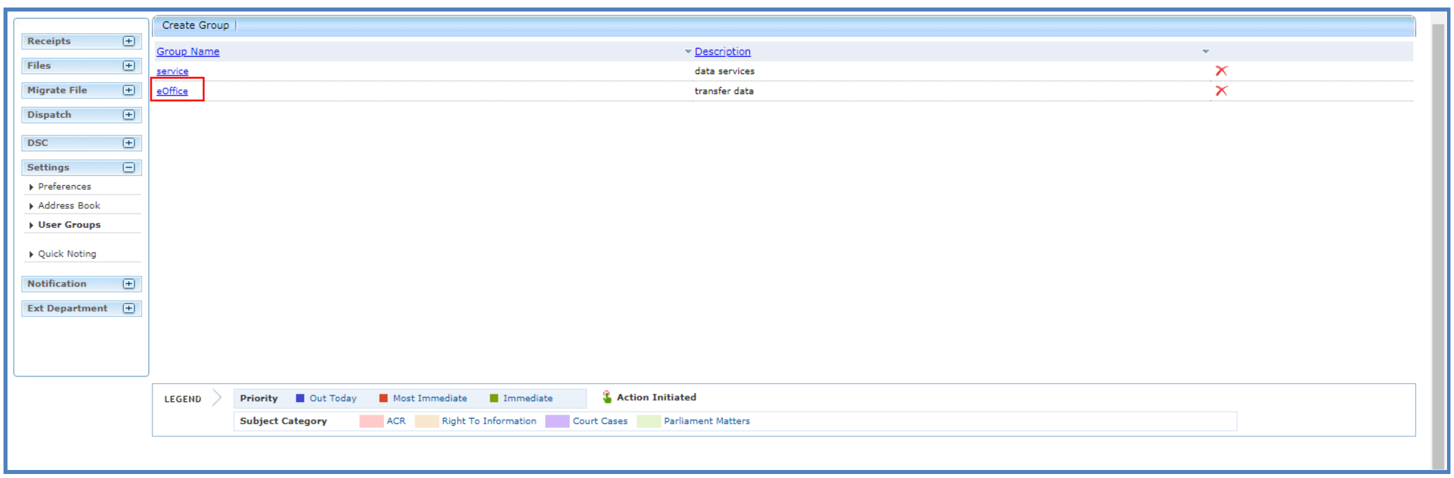


Fig.253

- Select the users from the list and click the Save button, shown in **Fig.254**:

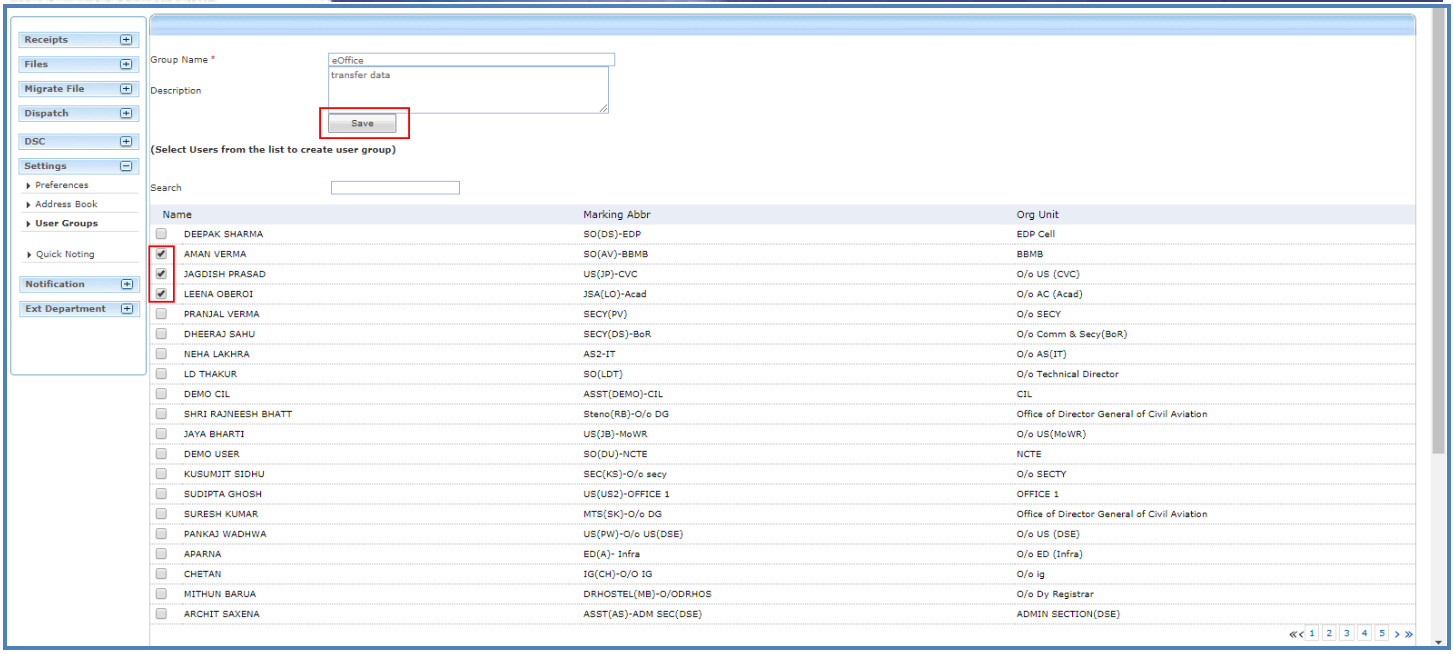


Fig.254

- The user(s) is added up in the selected group.
- To edit the group details click the group name, make required changes and click Save button.
- To delete the created group, click icon.

Quick Noting

It is used to create a customized list of one-liner noting frequently used in organizations. It helps the user while creating the noting for Electronic files.

- Click the **Quick Noting** sub-module under **Settings** module. The User Defined Quick Noting screen appears as shown in **Fig.255:**

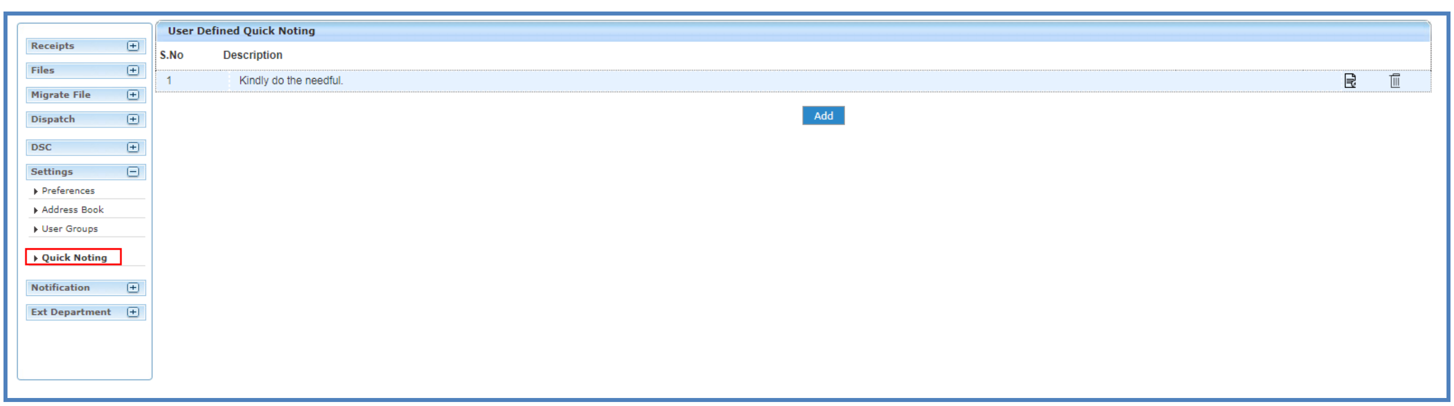


Fig.255

- Click Add button, the User Defined Quick Noting pop-up window appears.

- Enter the description and click Save button, as shown in **Fig.256**:

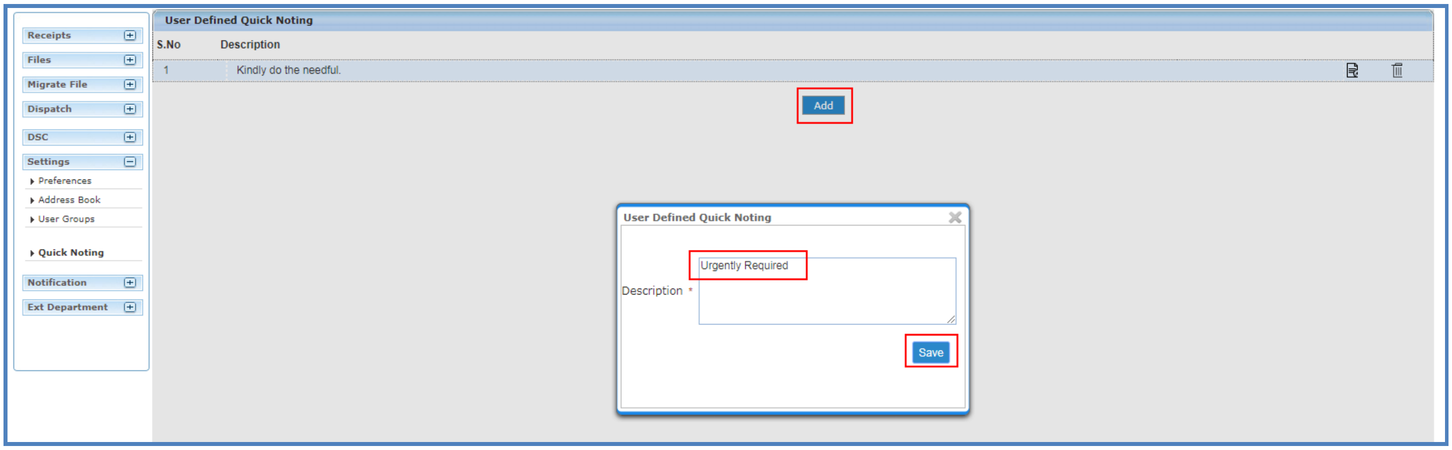


Fig.256

- The noting gets saved.

Other actions available under Quick notings screen are:

1. : To edit the quick noting description
2. : To delete the quick noting.

Annexure-I

Multiple post in eFile Login

- Enter the **Login ID** & **Password** in the eOffice portal, click 

button as shown in **Fig.1**:

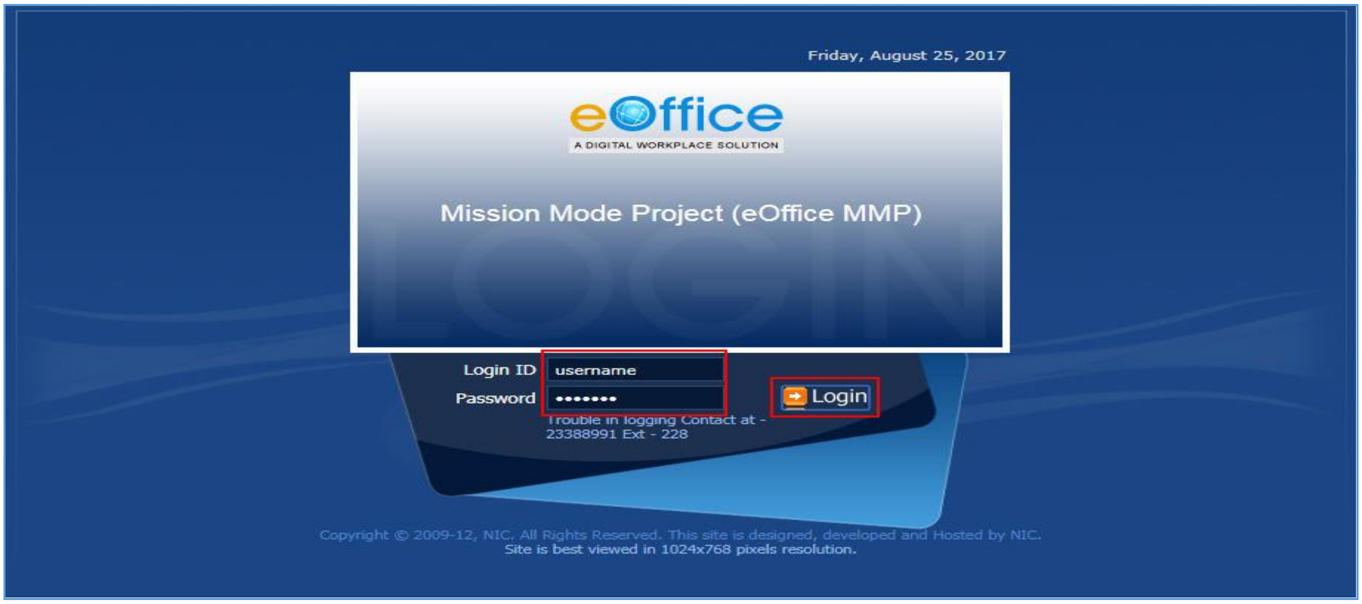


Fig.1

- eOffice homepage is displayed on successful login as shown in **Fig.2**.

- To open the **File Management System**, click the link mentioned in the left panel as highlighted in **Fig.2**:

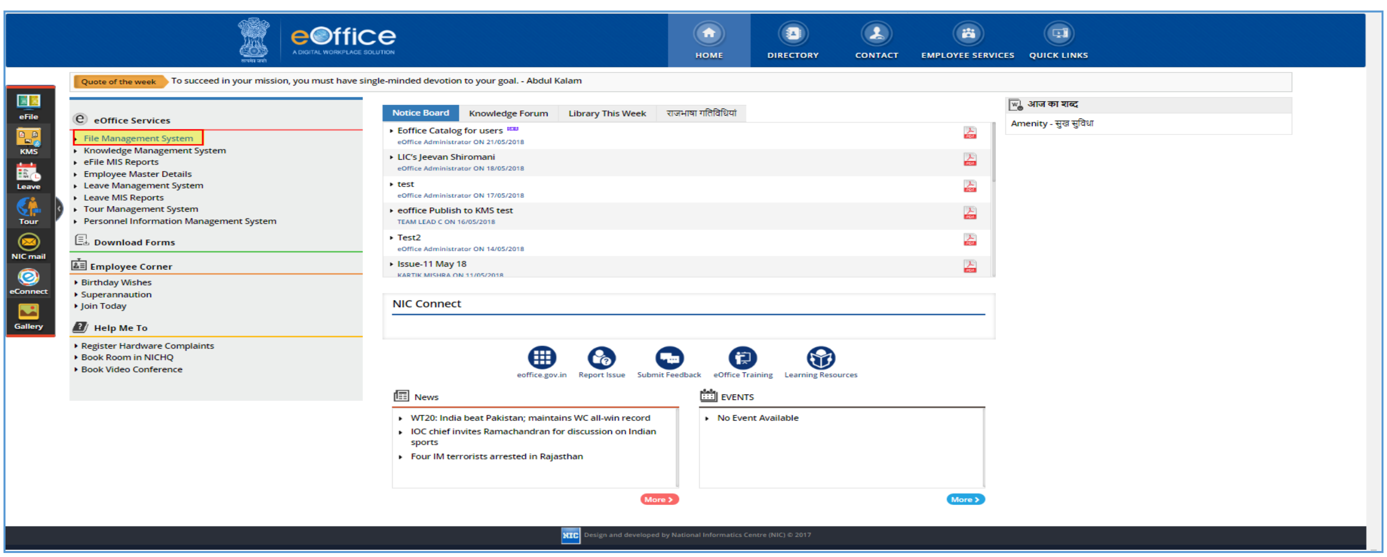


Fig.2

- User is then redirected to the eFile application, as shown in **Fig.3**:

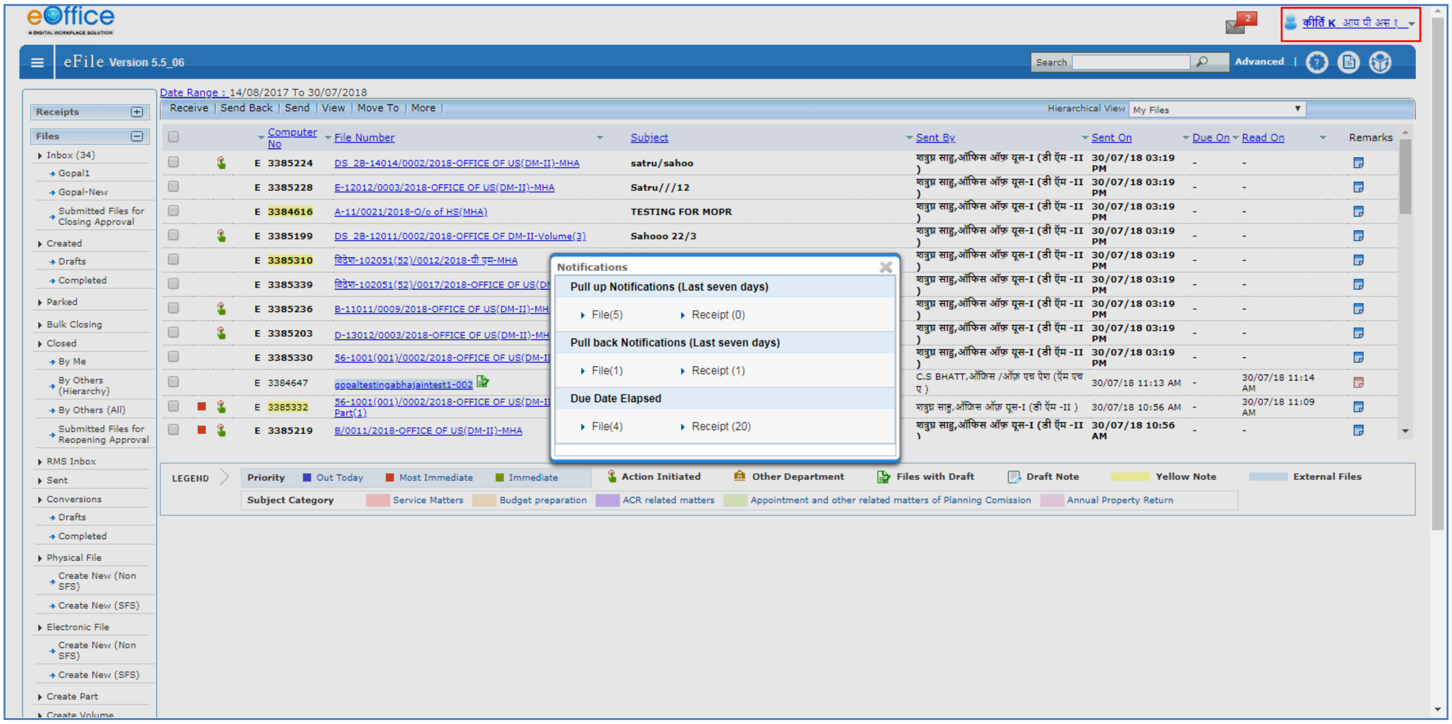


Fig.3

Note:

1) By default application logs into the Primary Post eFile account, as shown in Fig.3.

2) A user can access multiple posts through the interface, if a user is assigned with multiple posts in a department as shown in Fig.4.

- To access another post account in eFile, click on the user icon.

- The drop box containing multiple posts appears. Click on the another post, as shown in **Fig.4:**

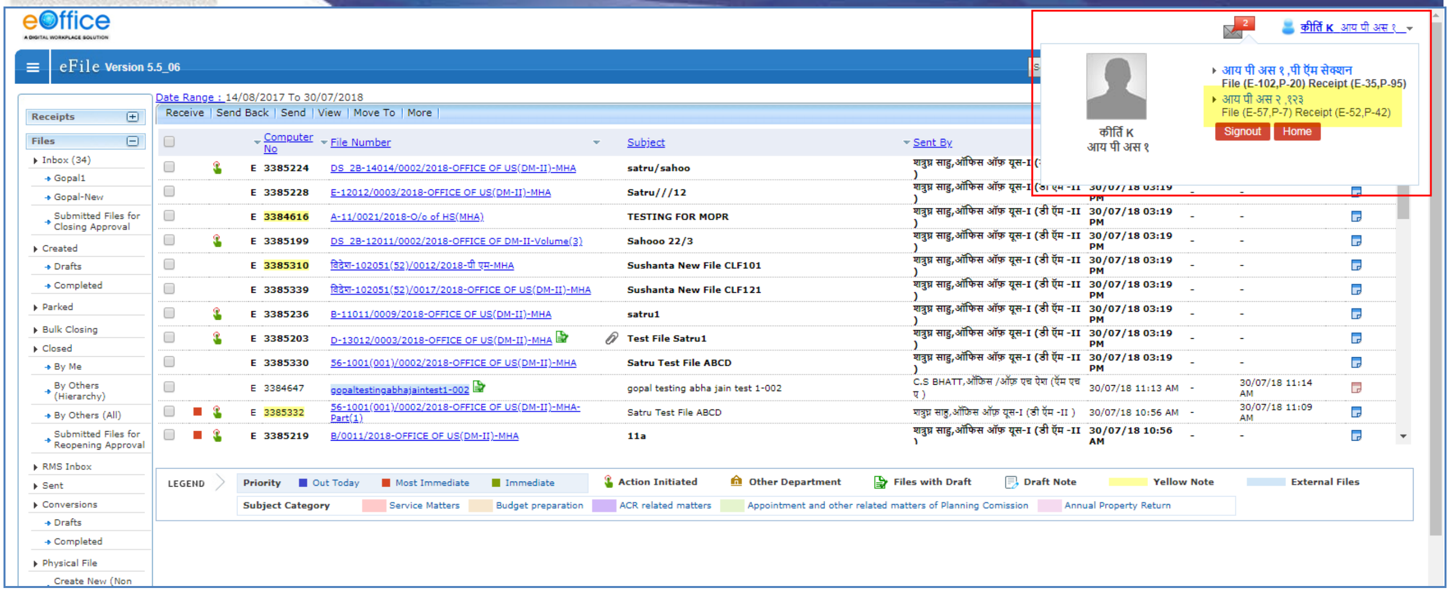


Fig.4

- User is then redirected to the Inbox screen of another post account, as shown in **Fig.5:**

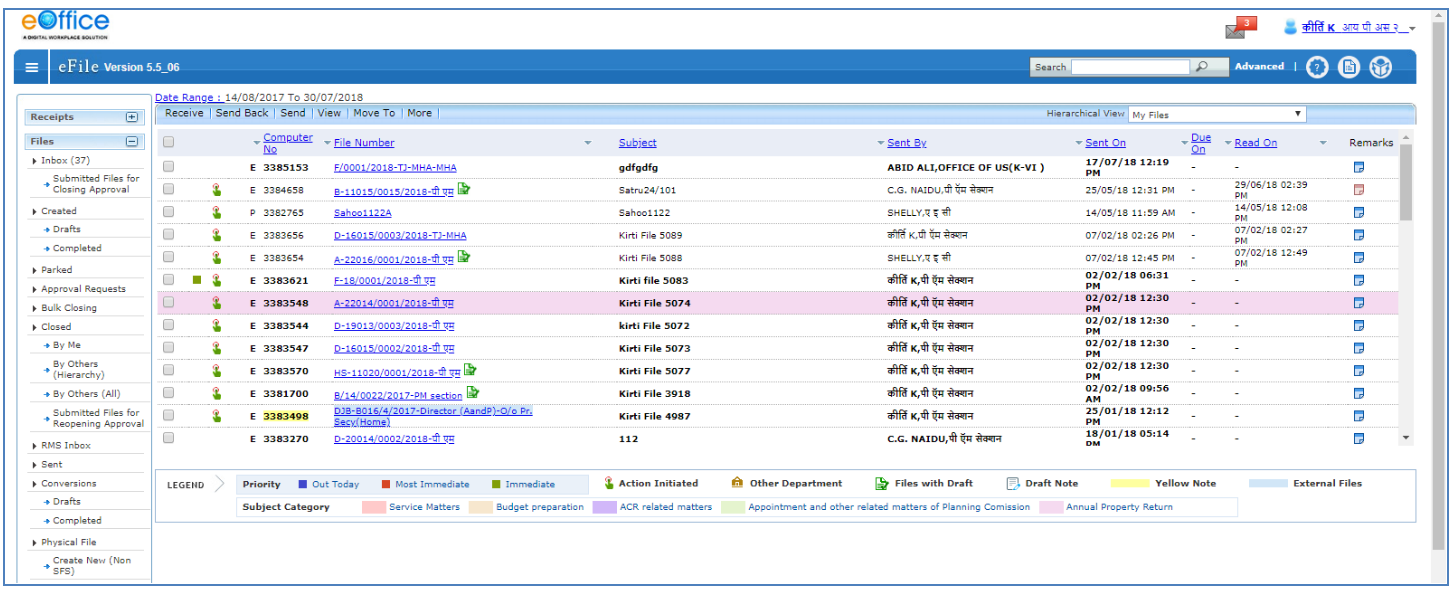


Fig.5

Annexure-II

Guidelines for Scanning Document

The objective of scanning guidelines is to scan and bring the physical daks/letters and other documents into the electronic system in the least possible size, so as to facilitate quick and easy retrieval of eFiles from the server/system.

For Physical DAK or Inward Correspondence –

Scan the whole DAK/inward correspondence as single pdf only (preferably as searchable pdf). The size should not exceed 20MB.

While Migration of physical files –

Scan all the required files in following manner –

1.	**<u>Correspondence:</u>** The Receipts, References and Issues on the correspondence side may be scanned as single PDF document keeping check on the max size as 20 MB. If pages are more and size exceeds 20MB then more than one PDF should be created.
1.	**<u>Noting:</u>** Scan all the pages of the Noting as one single PDF document.

For scanning of various document types, the following colour & DPI are suggested:

Sl. No.	***Document type/Condition***	***Color & DPI***	***Output Format***
1	Regular/normal/good	B/W-100 dpi	PDF
2	Damaged/tarnished/clouded	B/W- increase DPI as per legibility / visibility	PDF
3	Seriously damaged/tarnished/clouded	B/W- increase DPI as per legibility / visibility	PDF
4	Coloured Photographs/text	Grayscale	PDF

Annexure-III

Digital signing of Receipt Remarks

Pre-requisites

1. DSC should be registered with eFile.

Note:

This is configurable feature at instance Level.

DSC feature is available only to the user(s) whose DSC is registered with eFile.

User can sign the remarks of the receipt while sending the receipt to the other user by performing the following steps:

- Select the receipt from **Inbox** or **Created** list and click Send tab from the menu bar, the **Send** screen as appears is shown in **Fig.1**:

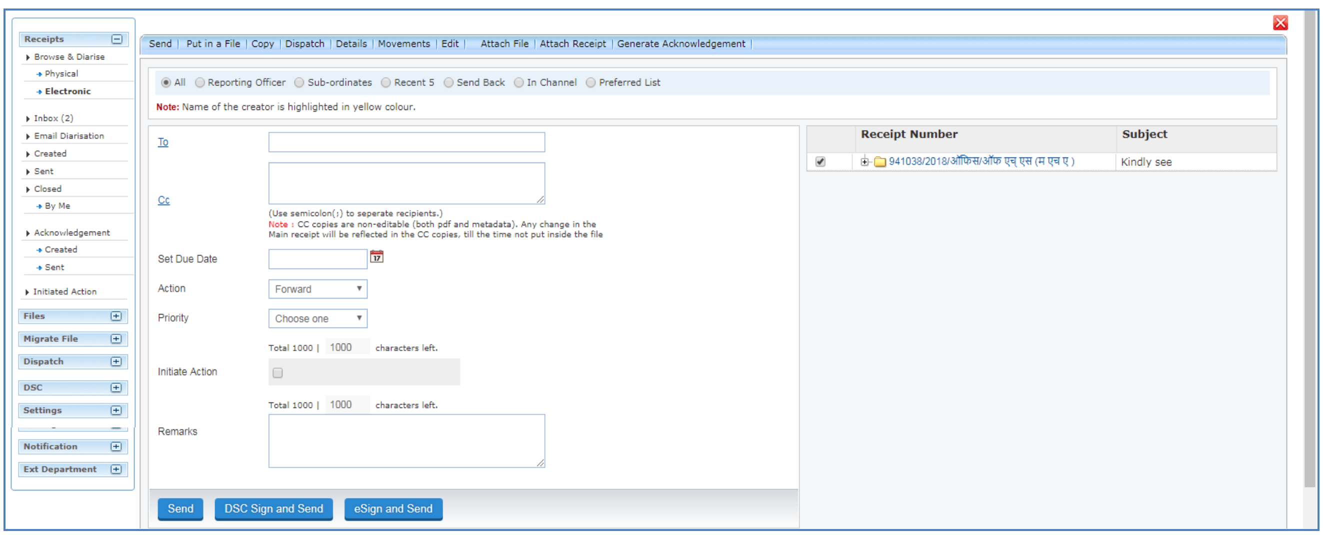


Fig.1

- Enter the mandatory metadata and click DSC Sign and Send button in the Send screen, a pop up window appears asking for the **DSC** token Pin, as shown in **Fig.2**:

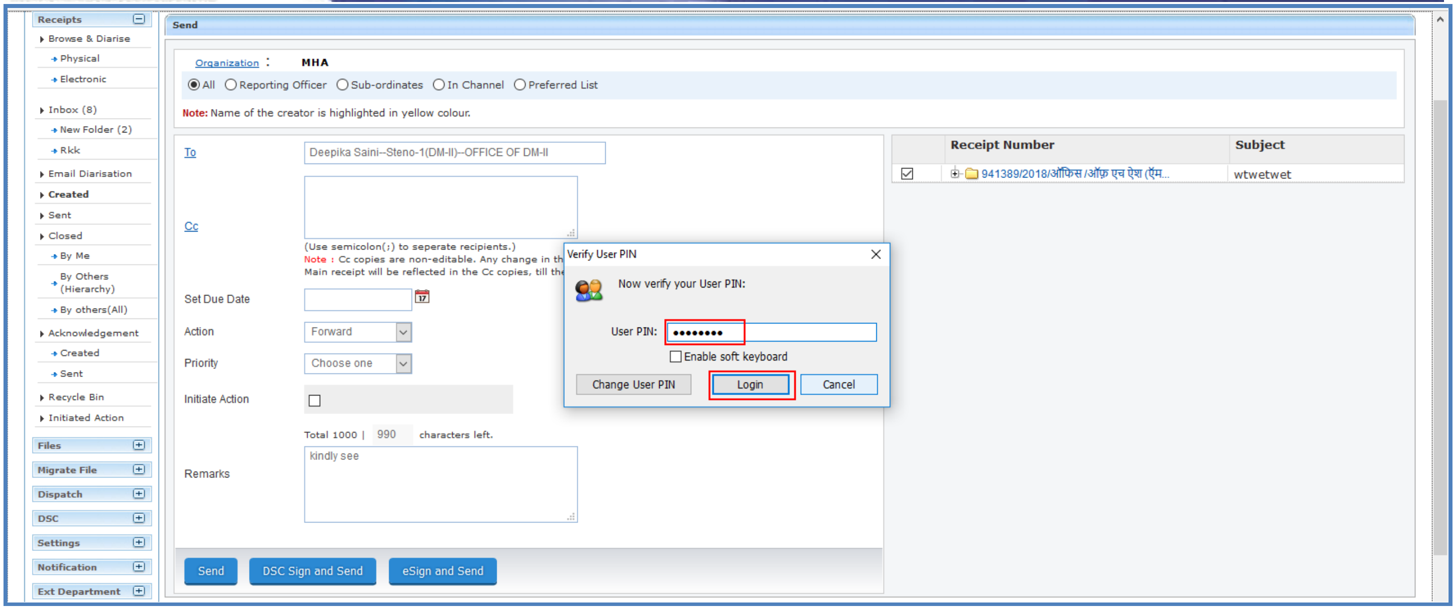


Fig.2

- Enter the **Pin** and click  button, as shown in above **Fig.2**.

- The remarks get signed as shown in **Fig.3**:

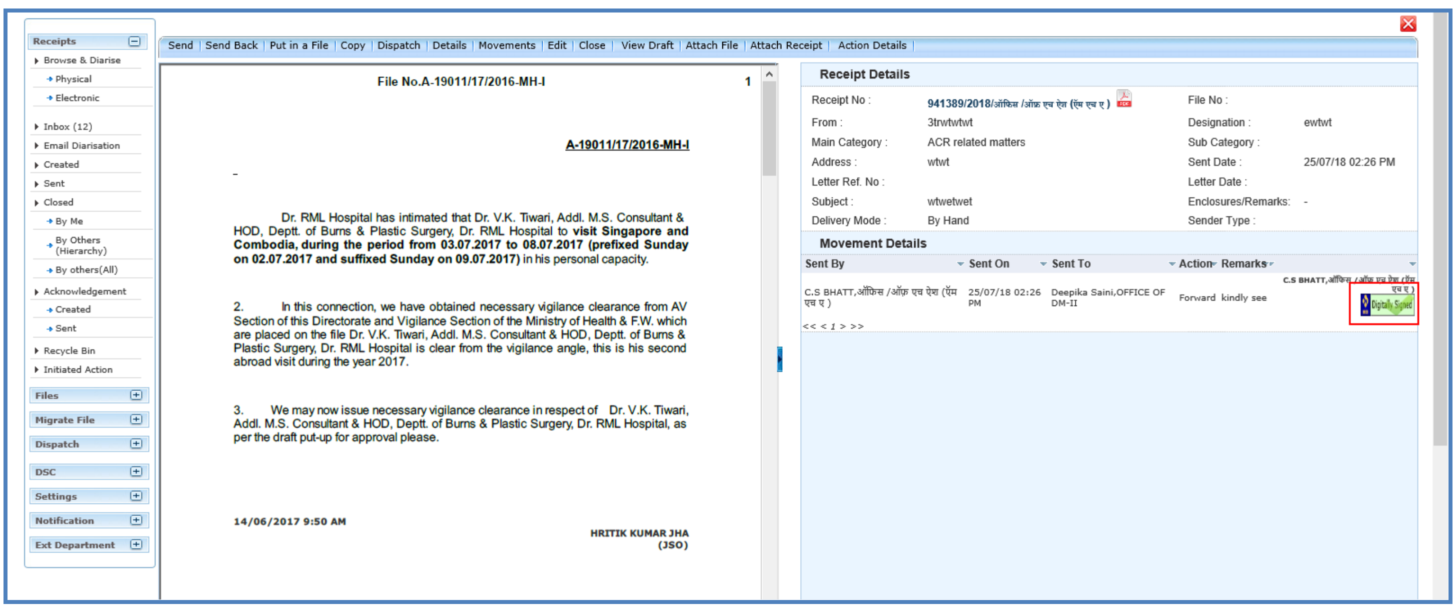


Fig.3

Digital signing of DFA

Pre-requisites

2. DSC should be registered with eFile.

Note:

This is configurable feature at instance Level.

DSC feature is available only to the user(s) whose DSC is registered with eFile.

User can sign the draft by performing the following steps:

- Create and approve the draft by following the draft creation and approval process.. The draft dispatch and sign screens will be displayed as shown in **Fig.4**:

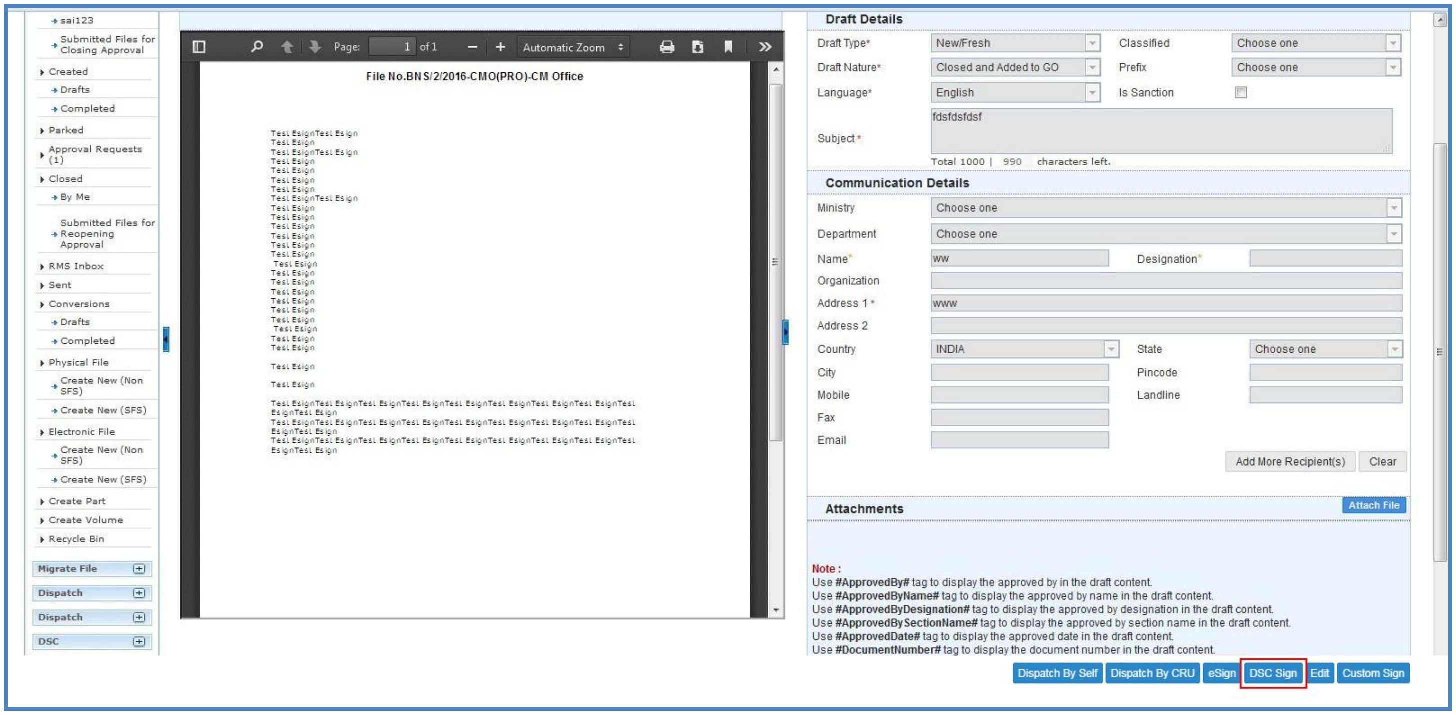


Fig.4

- Click the  button to facilitate the signing process, a pop up window appears asking for the **DSC** token Pin, as shown in **Fig.5**:

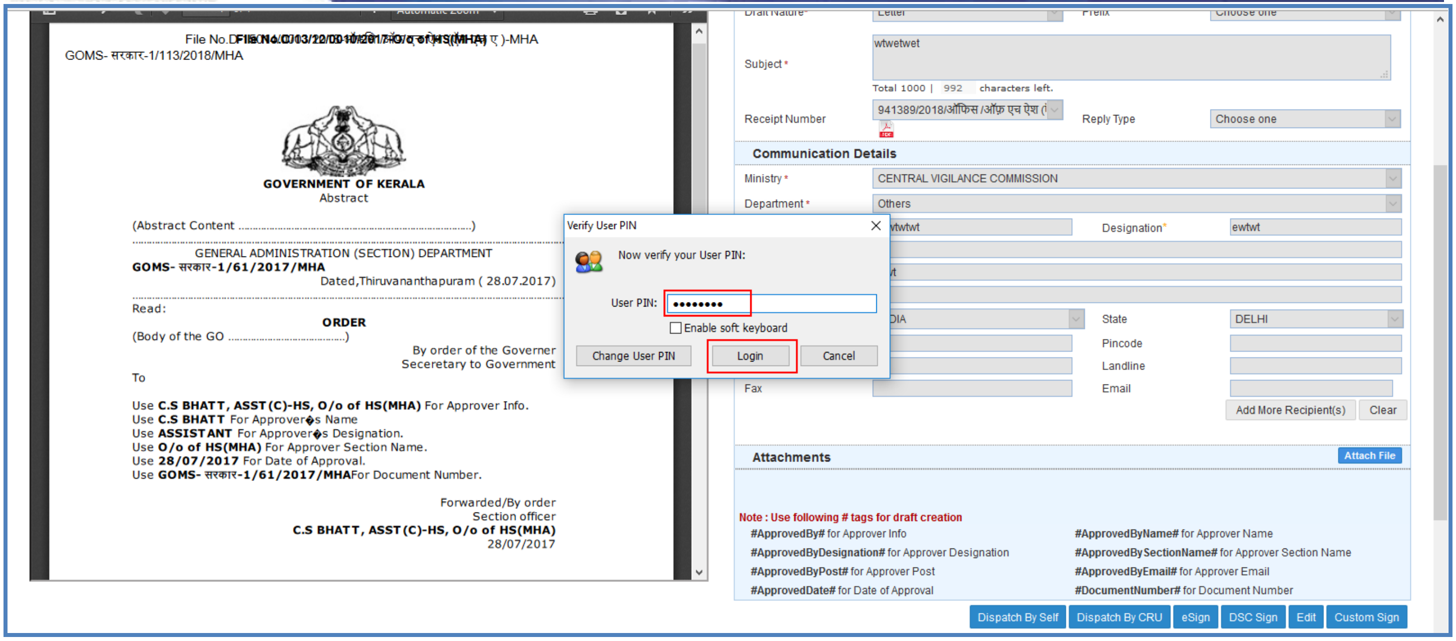


Fig.5

- Enter the **Pin** and click Login button, the remarks get signed as shown in **Fig.6**:

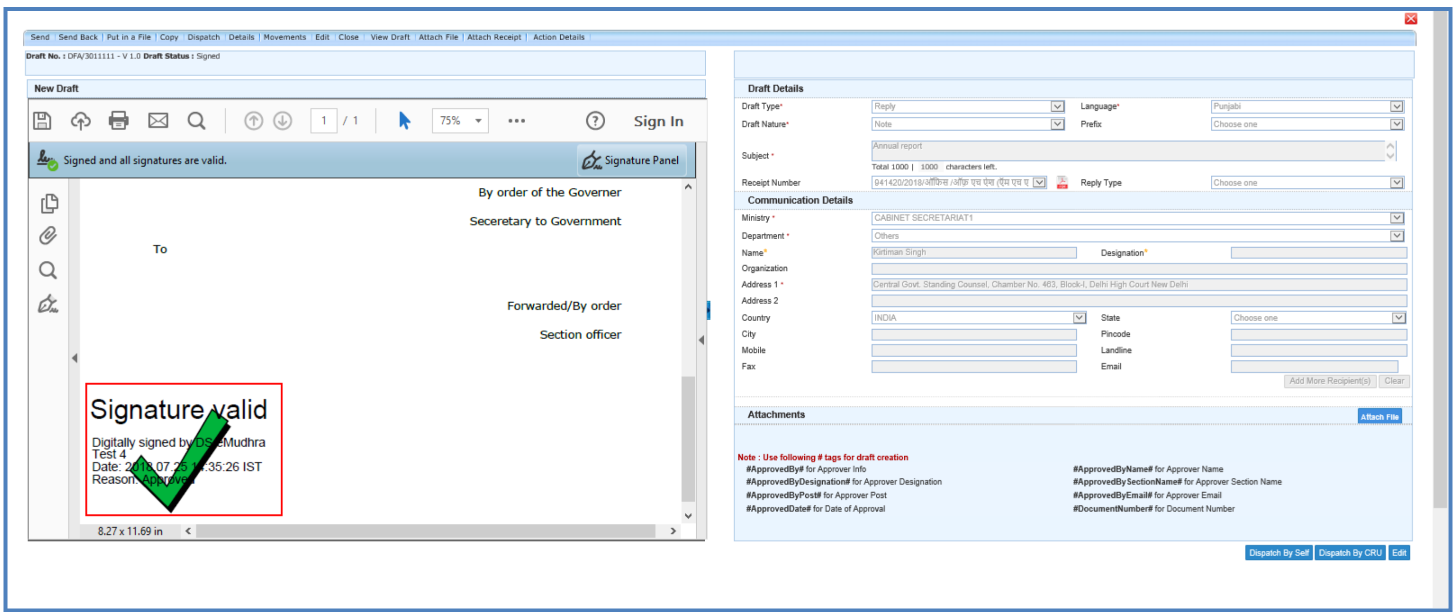


Fig.6

Custom Digital signing of DFA

Provision of eSigning Draft at customized/desired Position.

- Create and approve the draft using the draft creation process. The draft dispatch and sign screens will be displayed as shown in **Fig.7**:

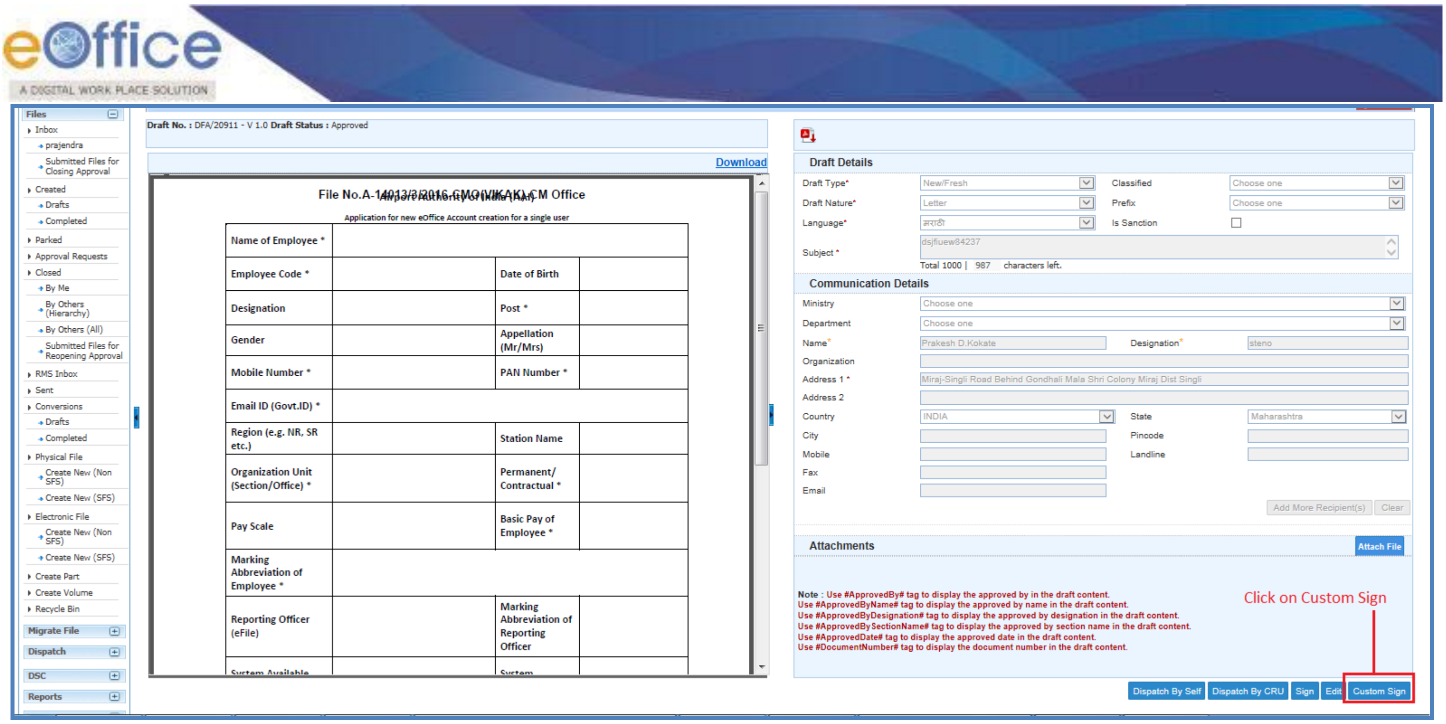


Fig.7

- Click the Custom Sign button to sign the draft at desired position. Custom Sign pop-up gets displayed as shown in **Fig.8**:

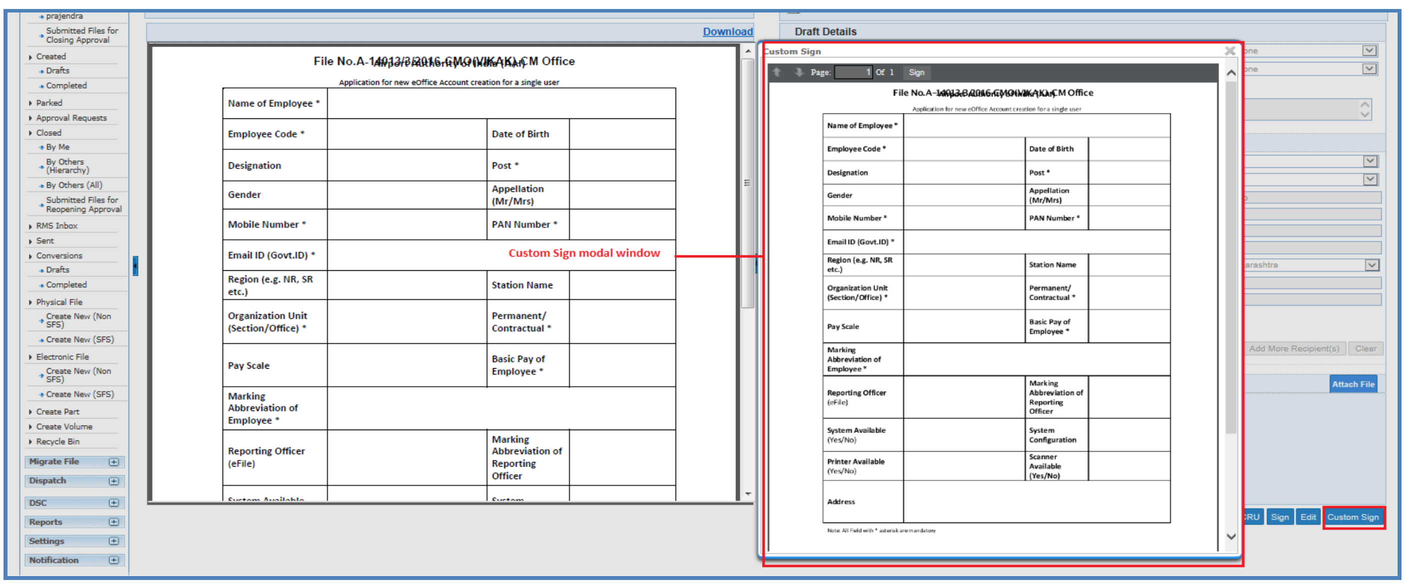


Fig.8

- Locate the desired position on the selected page and click Sign button to sign the draft as shown in **Fig.9**:

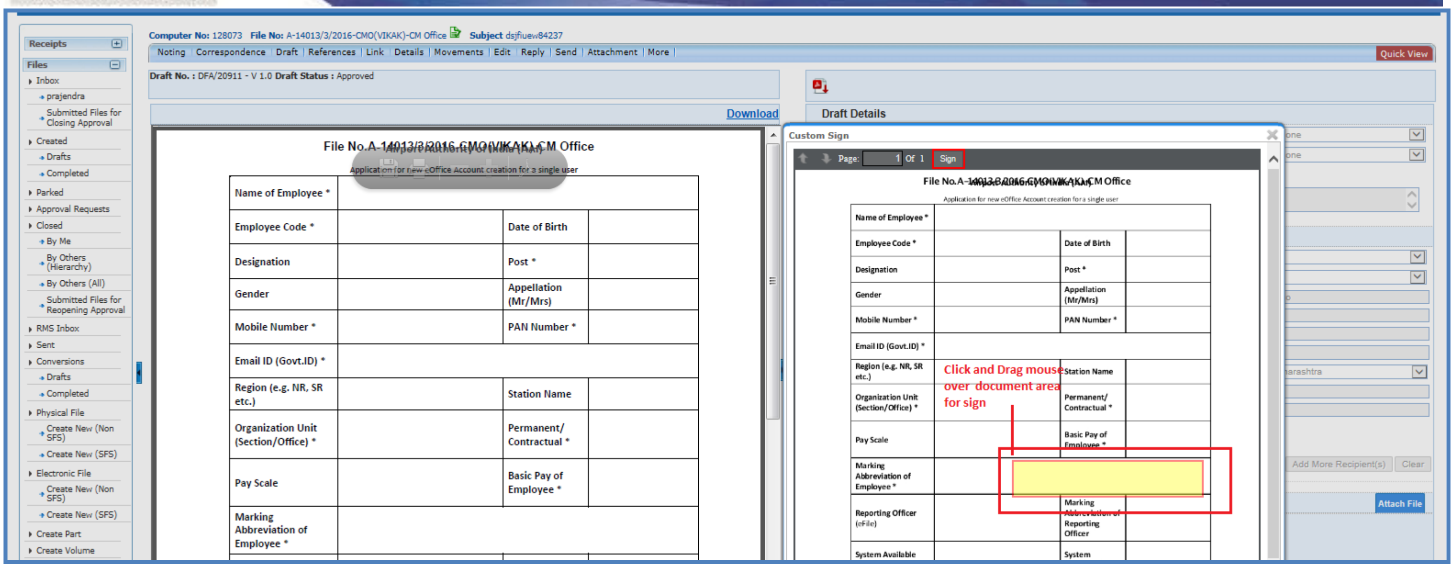


Fig.9

- The digital signature will be gets displayed at the desired position in the draft document, shown in **Fig.10**:

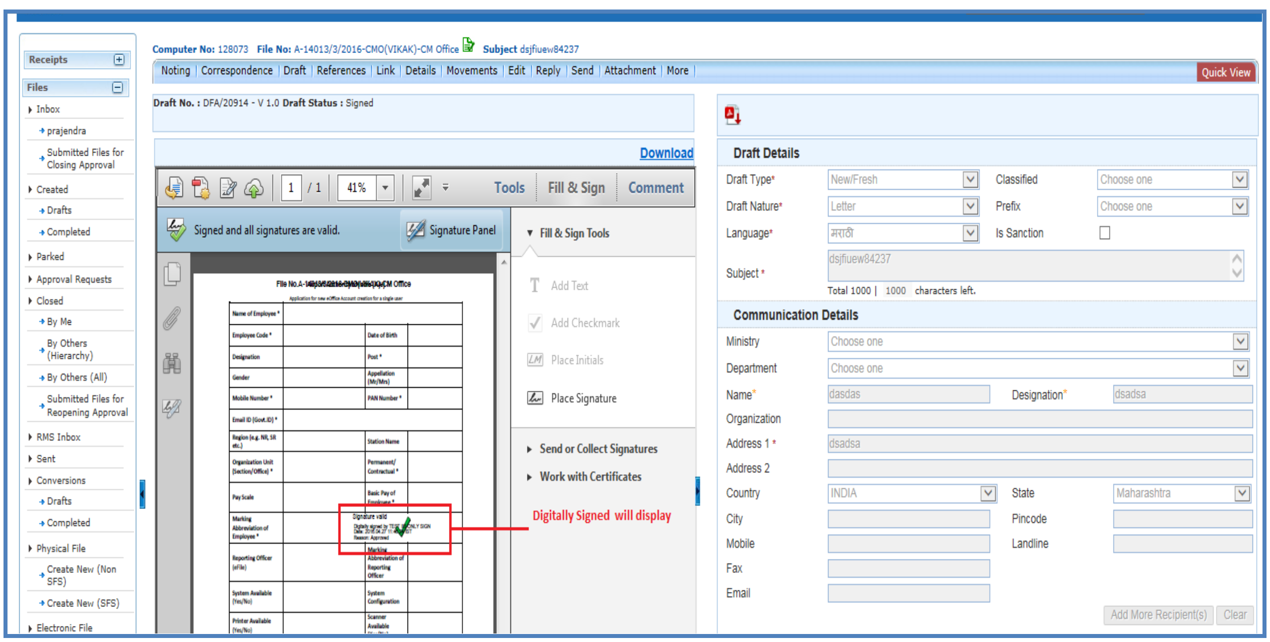


Fig.10

Digital Signing of File Noting

1. DSC should be registered with eFile.

Note:

This is configurable feature at instance Level.

DSC feature is available only to the user(s) whose DSC is registered with eFile.

User can sign the noting of the file while sending the file to the other user by performing the following steps:

- Select the file from **Inbox** or **Created** list and click Send tab from the menu bar, the **Send** screen as appears is shown in **Fig.11**:

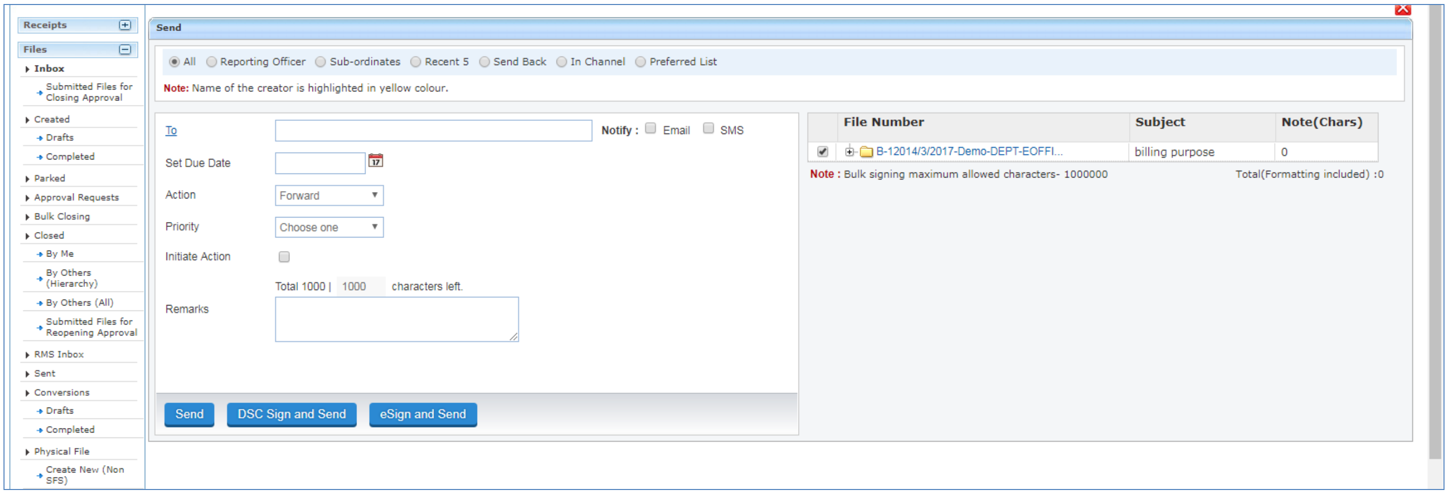


Fig.11

- Enter the mandatory metadata and click DSC Sign and Send button in the Send screen, a pop up window appears asking for the **DSC** token Pin, as shown in **Fig.12**:

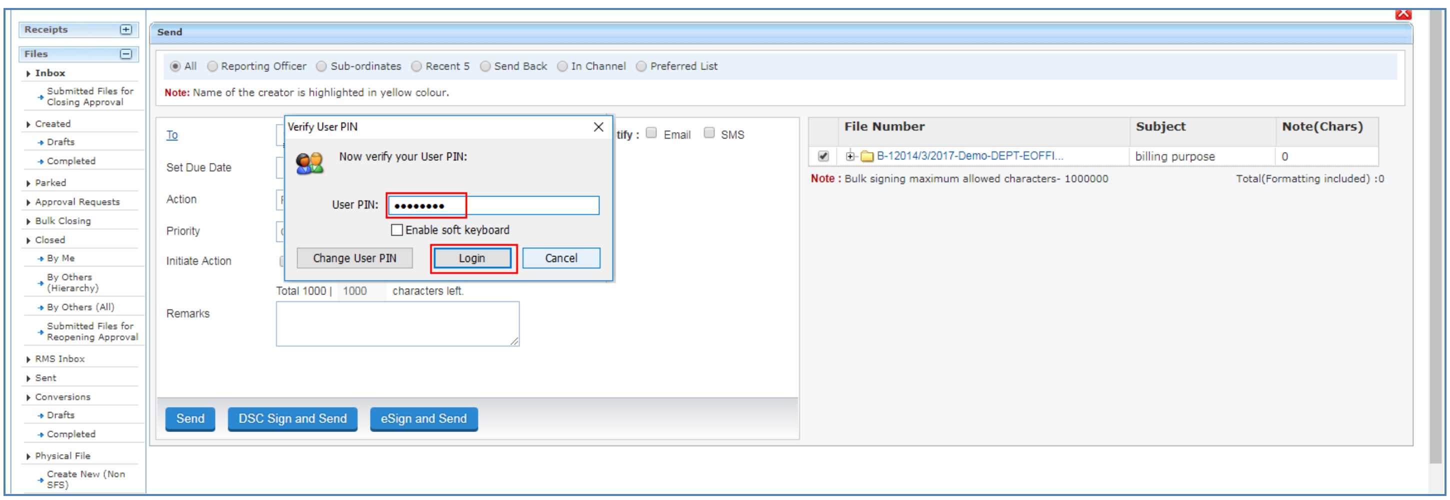


Fig.12

- Enter the **Pin** and click Login button, as shown in above **Fig.12**.

- The remarks get signed as shown in **Fig.13**:

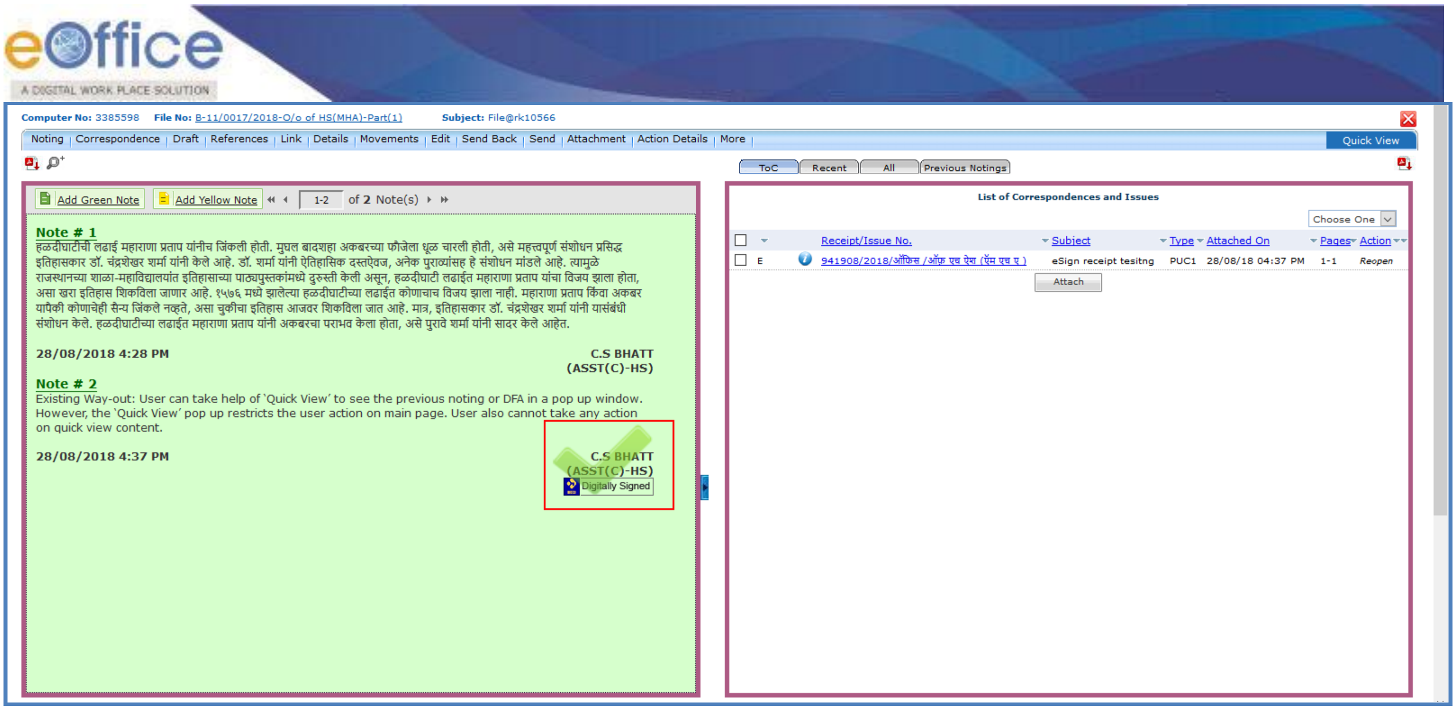

eOffice
A DIGITAL WORK PLACE SOLUTION
Computer No: 3385598 File No: B-11/0017/2018-O/o of HS(MHA)-Part(1) Subject: File@rk10566
Noting | Correspondence | Draft | References | Link | Details | Movements | Edit | Send Back | Send | Attachment | Action Details | More
Quick View
Add Green Note
Add Yellow Note
1-2 of 2 Note(s)
Note # 1
हळदीघाटीची लढाई महाराणा प्रताप यांनीच जिंकली होती. मुघल बादशहा अकबरच्या फौजेला धूळ चारली होती, असे महत्त्वपूर्ण संशोधन प्रसिद्ध इतिहासकार डॉ. चंद्रशेखर शर्मा यांनी केले आहे. डॉ. शर्मा यांनी ऐतिहासिक दस्तऐवज, अनेक पुराव्यांसह हे संशोधन मांडले आहे. त्यामुळे राजस्थानच्या शाळा-महाविद्यालयांत इतिहासाच्या पाठ्यपुस्तकांमध्ये दुरुस्ती केली असून, हळदीघाटी लढाईत महाराणा प्रताप यांचा विजय झाला होता, असा खरा इतिहास शिकविला जाणार आहे. १५७६ मध्ये झालेल्या हळदीघाटीच्या लढाईत कोणाचाच विजय झाला नाही. महाराणा प्रताप किंवा अकबर यापैकी कोणाचेही सैन्य जिंकले नव्हते, असा चुकीचा इतिहास आजवर शिकविला जात आहे. मात्र, इतिहासकार डॉ. चंद्रशेखर शर्मा यांनी यासंबंधी संशोधन केले. हळदीघाटीच्या लढाईत महाराणा प्रताप यांनी अकबरचा पराभव केला होता, असे पुरावे शर्मा यांनी सादर केले आहेत.
28/08/2018 4:28 PM
C.S BHATT
(ASST(C)-HS)
Note # 2
Existing Way-out: User can take help of 'Quick View' to see the previous noting or DFA in a pop up window. However, the 'Quick View' pop up restricts the user action on main page. User also cannot take any action on quick view content.
28/08/2018 4:37 PM
C.S BHATT
(ASST(C)-HS)
Digitally Signed
ToC
Recent
All
Previous Notings
List of Correspondences and Issues
Choose One
Receipt/Issue No.
Subject
Type
Attached On
Pages
Action
E
941908/2018/ऑफिस /ऑफ़ एच ऐश (ऍम एच ए)
eSign receipt tesitng
PUC1
28/08/18 04:37 PM
1-1
Reopen
Attach

Fig.13

Annexure-IV

eSigning of Receipt Remarks

Pre-requisites:

1. License Agreement (Consent of Authentication) should be made between the Department and eSign Service provider to avail the eSign service.

2. Aadhaar Number of eFile user should be mapped in the EMD.

Note:

This feature is dependent on eSign service provider, so if the eSign service is not available, this feature will not work.

To sign the remarks of the receipt while sending the receipt to the recipient, performing the following steps:

- Select the receipt from **Inbox** or **Created** list and click Send tab from the menu bar, the **Send** screen as appears is shown in **Fig.1**:

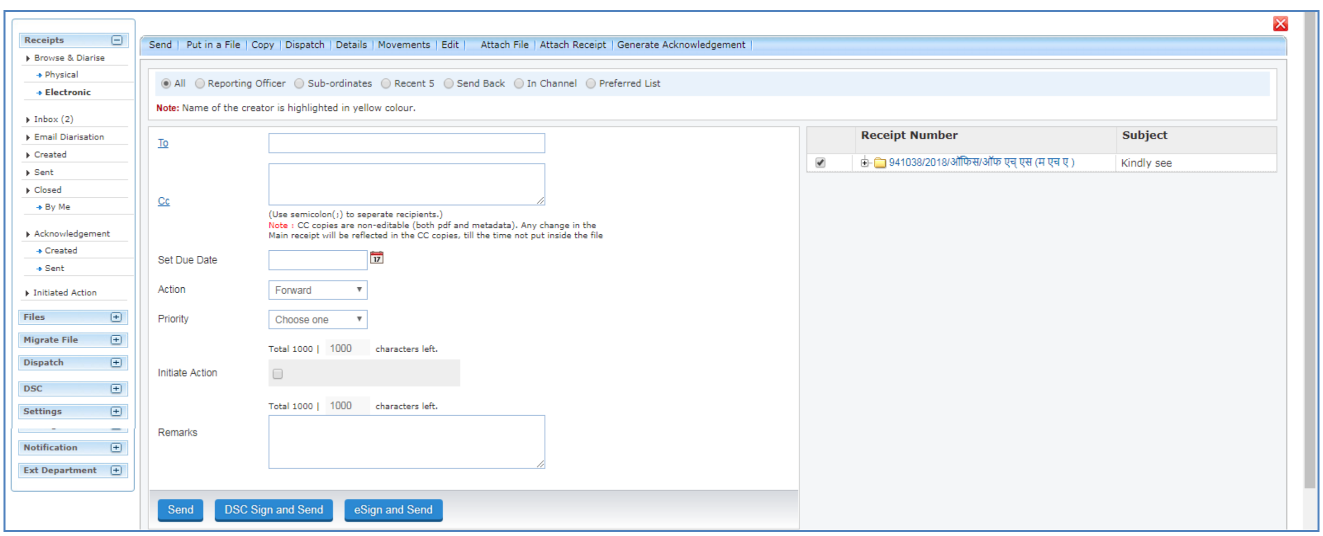


Fig.1

- Enter the mandatory metadata and click eSign and Send button in the Send screen, the Consent form will be displayed as shown in **Fig.2**:

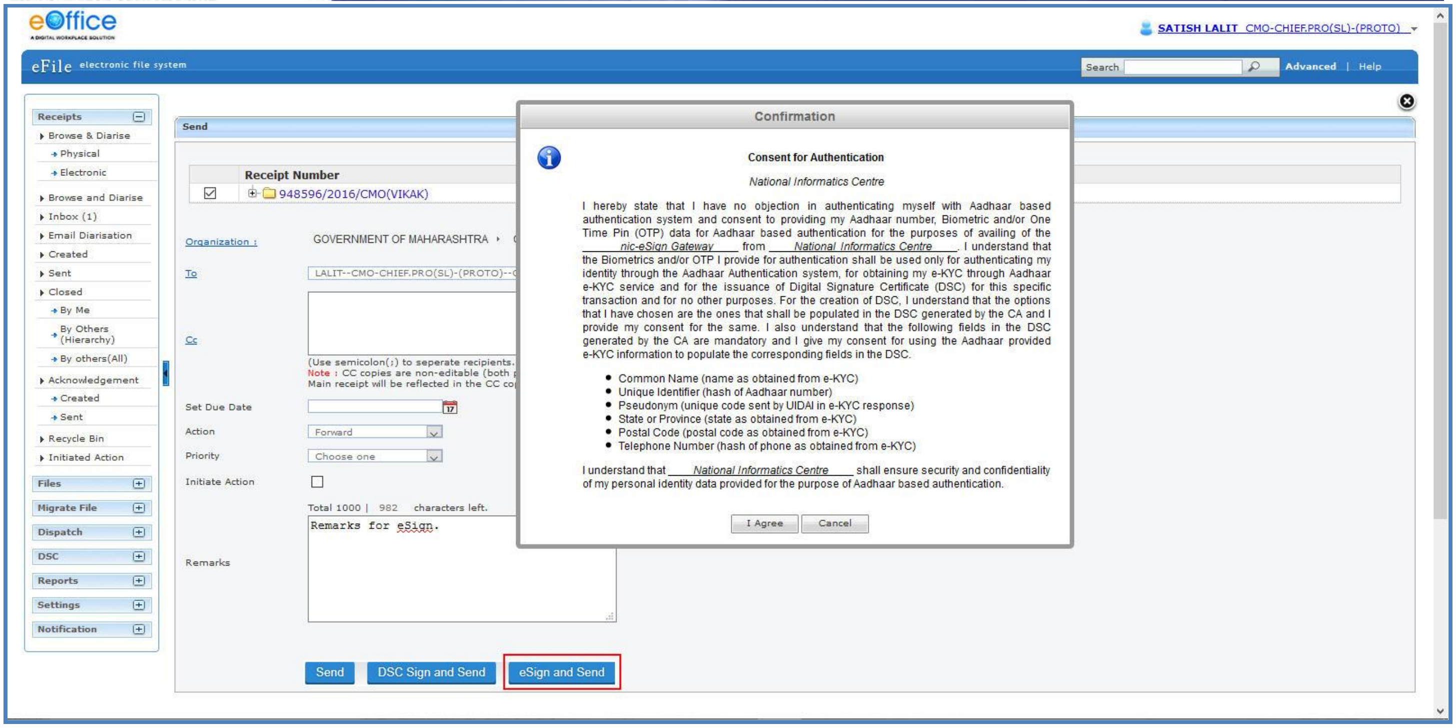


Fig.2

Note:

Remarks field is mandatory for eSign process.

- Click the I Agree button to continue the eSigning process.

Note:

If required, cancel the eSigning process by clicking Cancel button.

- eSigning Authentication Gateway screen is displayed.
- Choose the authentication mode as “**Virtual ID**” or “**Aadhar Number**”. If user chooses “**Virtual ID**” and clicks Perform eSign button, as shown in **Fig.3:**

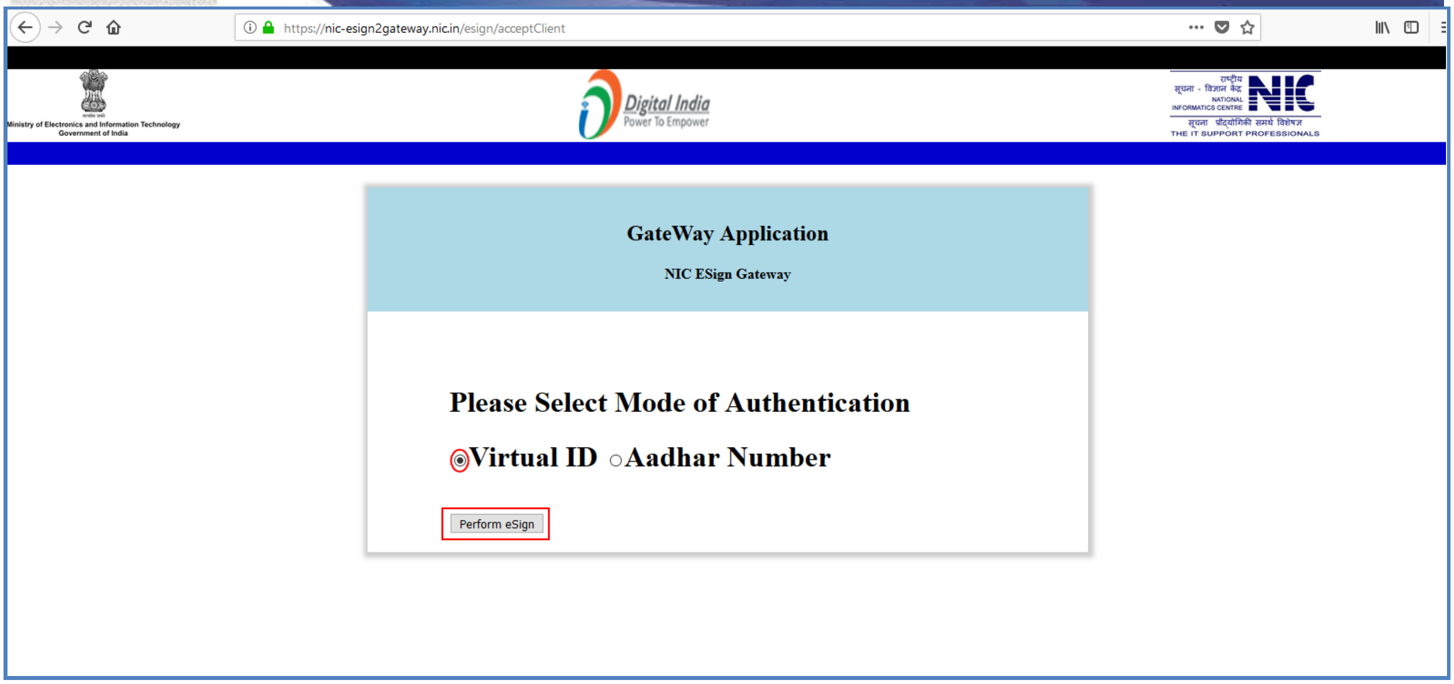


Fig.3

- eSigning screen appears, enter the **sixteen digit Virtual ID** and click **Get OTP** button as shown in **Fig.4**:

Fig.4

Note:

OTP will be received at the mobile number registered for Aadhaar.

- Enter the Aadhaar OTP and select the user consent check box and click on Submit button as show in **Fig.5**:

Fig.5

Note:

If user does not have a Virtual ID or forgotten his/her Virtual ID, then click **Get Virtual ID** link to generate/retrieve the Virtual ID link.

- The remarks get eSigned as shown in **Fig.6**:

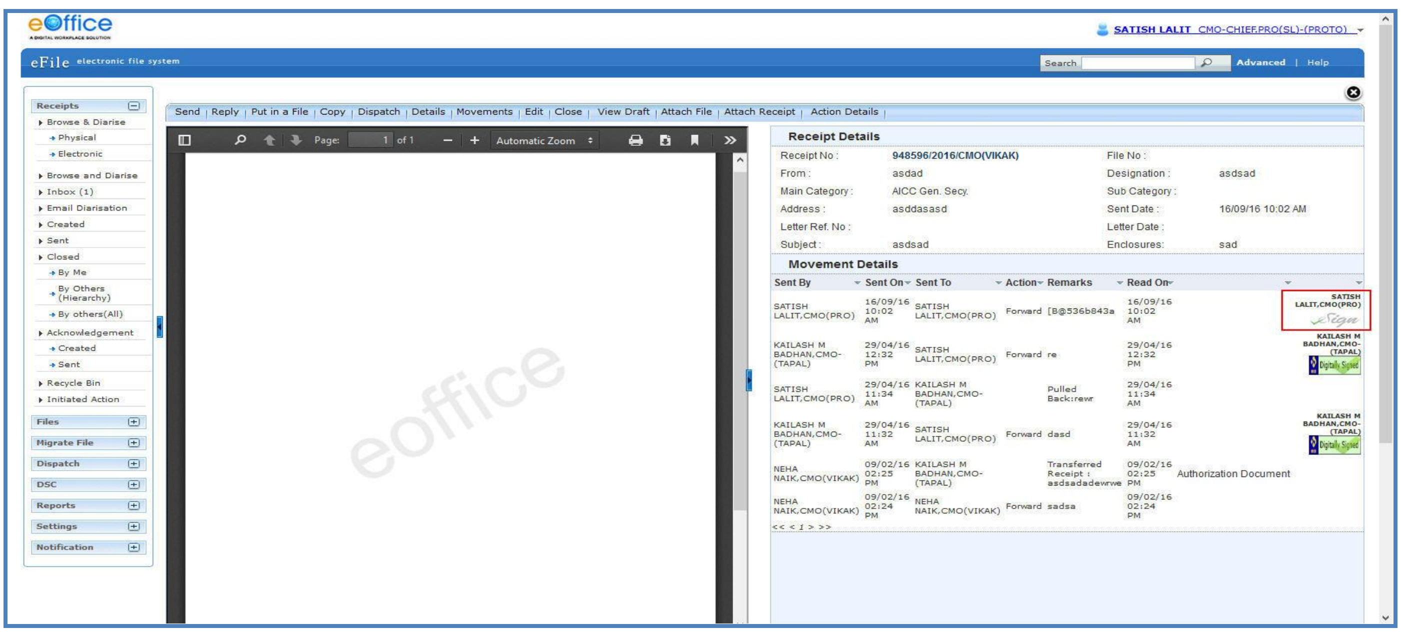


Fig.6

OR

- If user chooses "**Aadhaar Number**" and clicks Perform eSign button.
- eSigning screen appears, enter the **twelve digit Aadhaar ID** and click **Get OTP** button as shown in **Fig.7:**

Fig.7

- Enter the Aadhaar OTP, select the user consent check box, and click Submit button as show in **Fig.8:**

Fig.8

- The remarks get eSigned as shown in **Fig.9**:

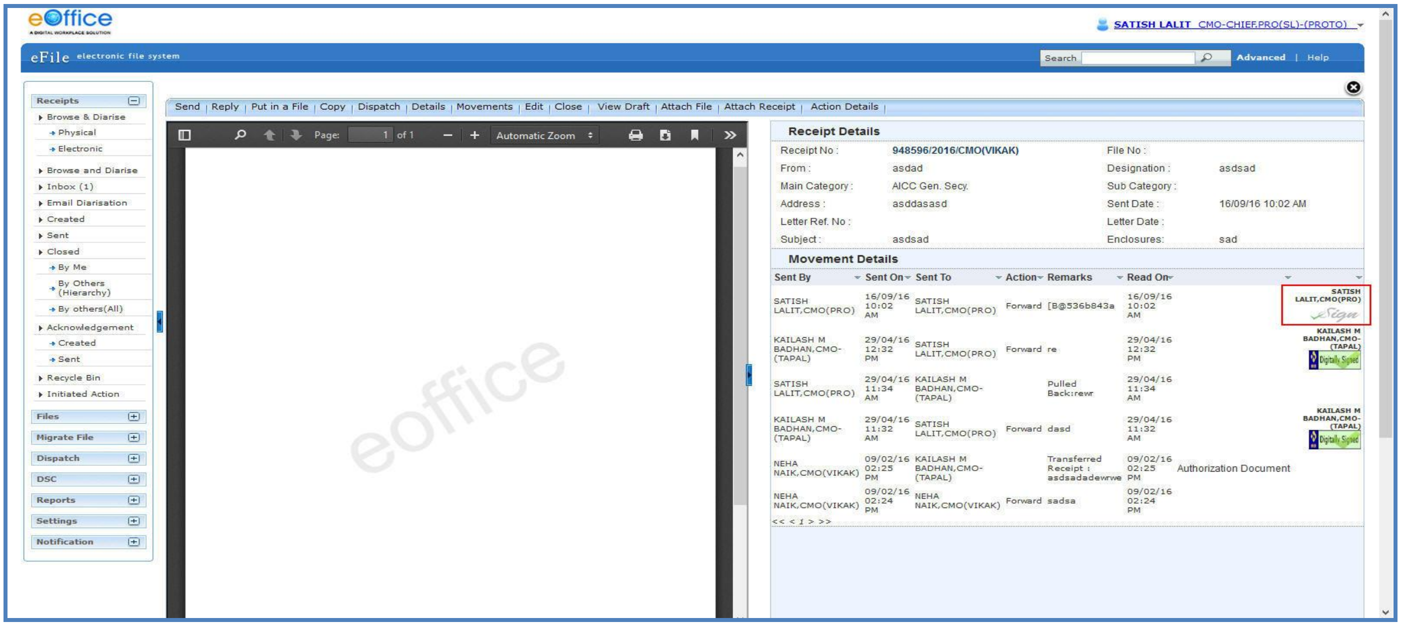


Fig.9

eSigning of DFA

Pre-requisites:

1. License Agreement (Consent of Authentication) should be made between the Department and eSign Service provider to avail the eSign service.
2. Aadhaar No. should be mapped in the EMD.

Note:

This feature is dependent on eSign service provider, so if the service is not available, this feature will not work.

To sign the draft by performing the following steps:

- Create and approve the draft by following the draft creation and approval process.. The draft dispatch and sign screens will be displayed as shown in **Fig.10**:

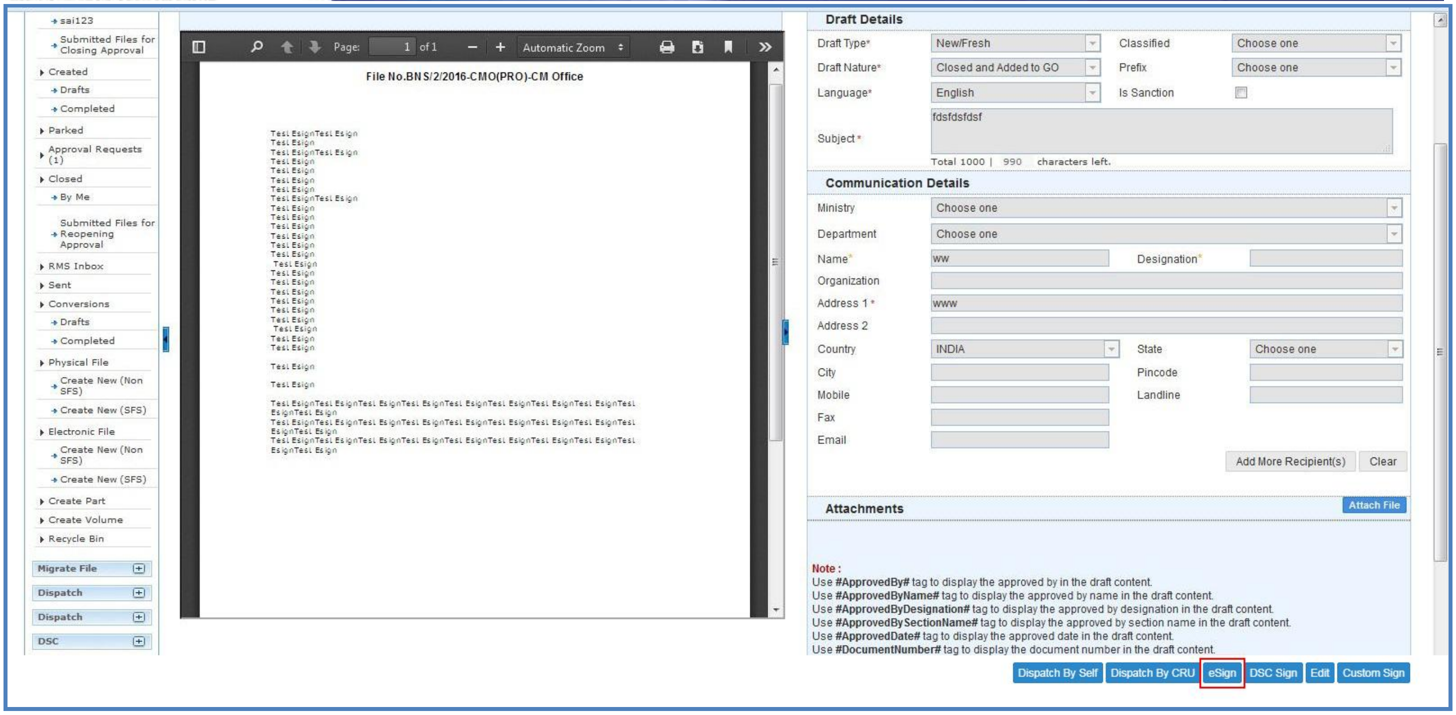


Fig.10

- Click the eSign button to facilitate the eSigning process (**Fig.10**). The Consent form will be displayed as shown in **Fig.11**:

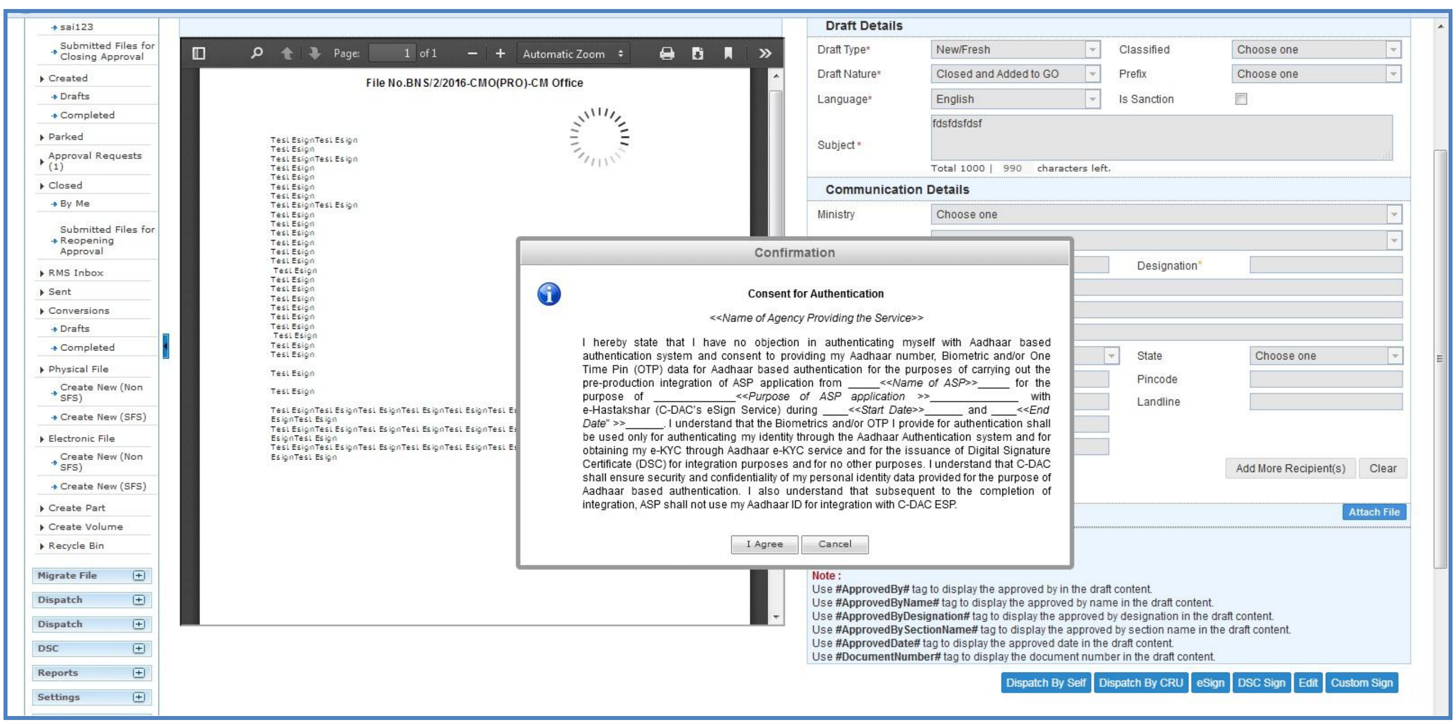


Fig.11

- Click I Agree button to continue the eSigning process.

Note:

If required, cancel the eSigning process by clicking Cancel button.

- eSigning Authentication Gateway screen is displayed.
- Choose the authentication mode as "**Virtual ID**" or "**Aadhar Number**". If user chooses "**Virtual ID**" and clicks Perform eSign button, as shown in **Fig.12:**

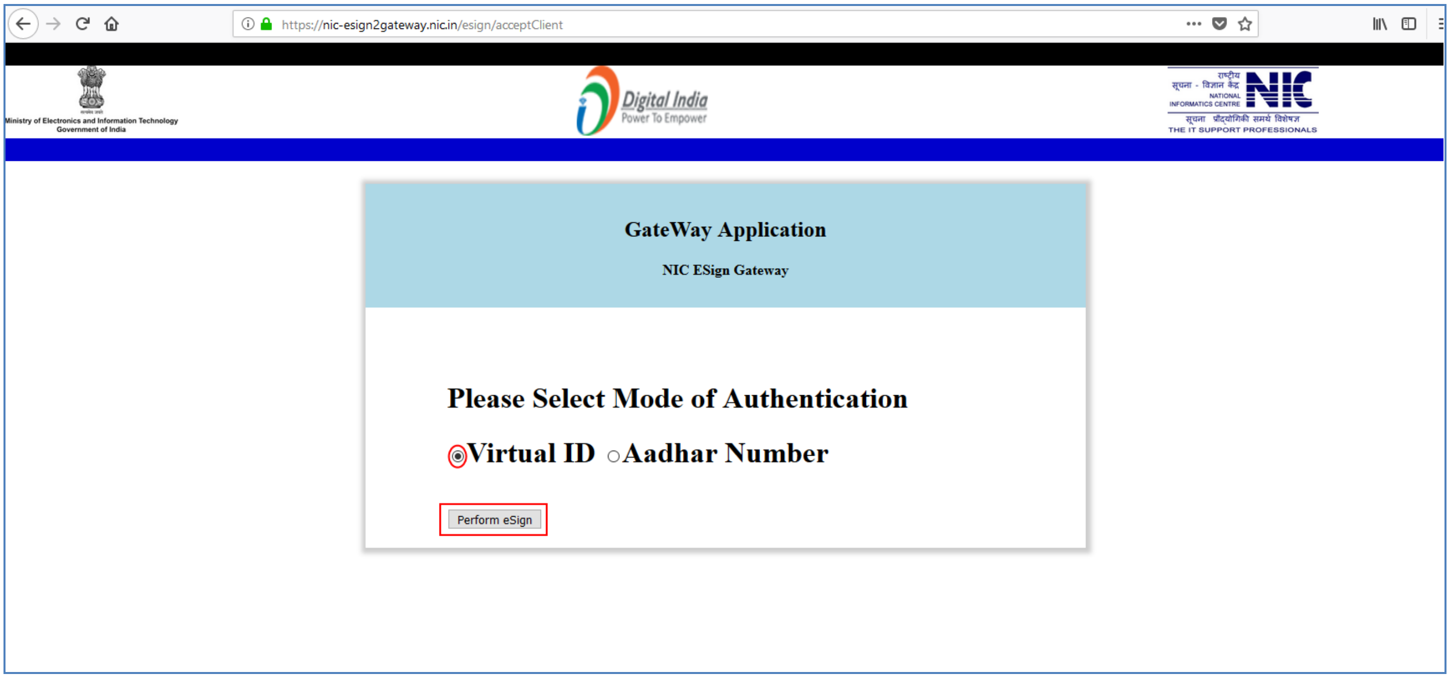


Fig.12

- eSigning screen appears, enter the **sixteen digit Virtual ID** and click **Get OTP** button as shown in **Fig.13**:

Fig.13

Note:

OTP will be received at the mobile number registered for Aadhaar.

- Enter the Aadhaar OTP and select the user consent check box and click on Submit button as show in **Fig.14**:

Fig.14

Note:

If user does not have a Virtual ID or forgotten his/her Virtual ID, then click **Get Virtual ID** link to generate/retrieve the Virtual ID link.

- The draft gets eSigned as shown in **Fig.15**:

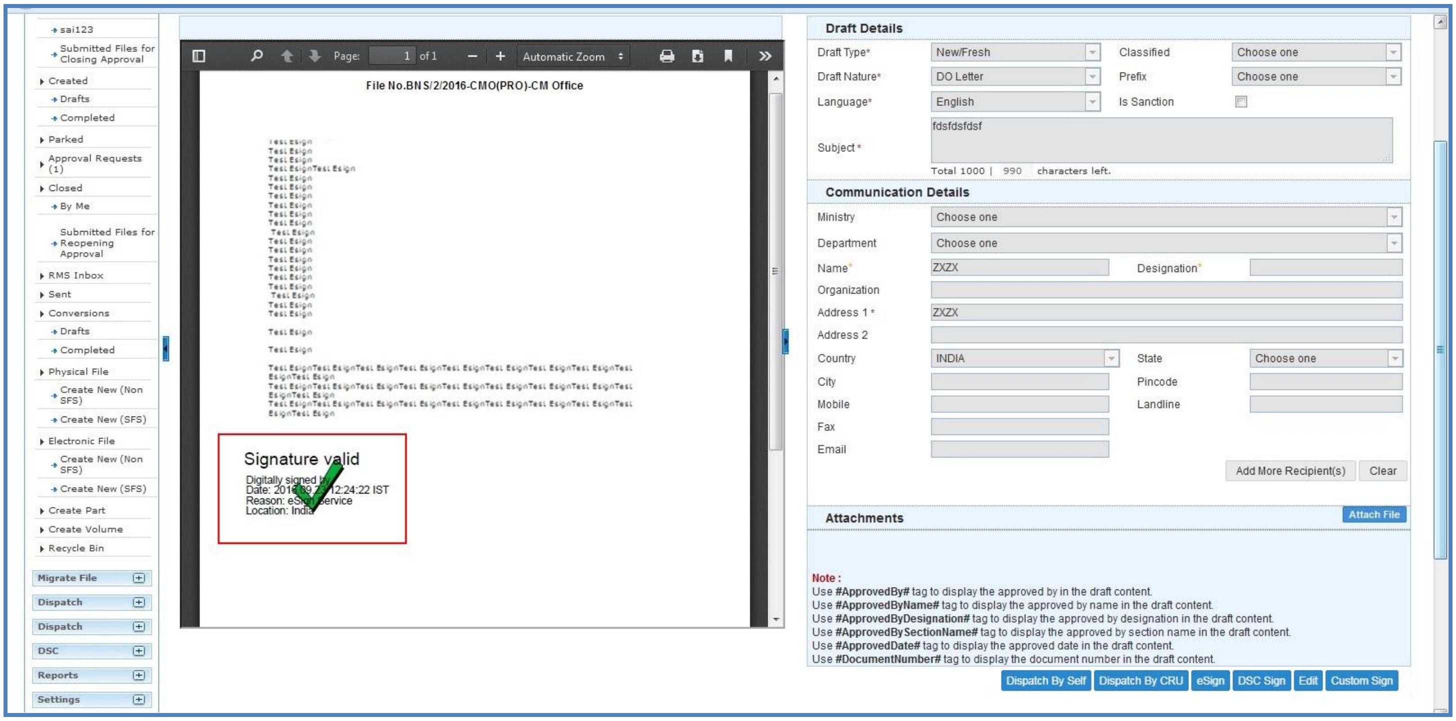


Fig.15

OR

- If user chooses “**Aadhaar Number**” and clicks Perform eSign button.
- eSigning screen appears, enter the **twelve digit Aadhaar ID** and click **Get OTP** button as shown in **Fig.16:**

Fig.16

- Enter the Aadhaar OTP, select the user consent check box, and click Submit button as show in **Fig.17:**

Fig.17

- The draft gets eSigned as shown in **Fig.18**:

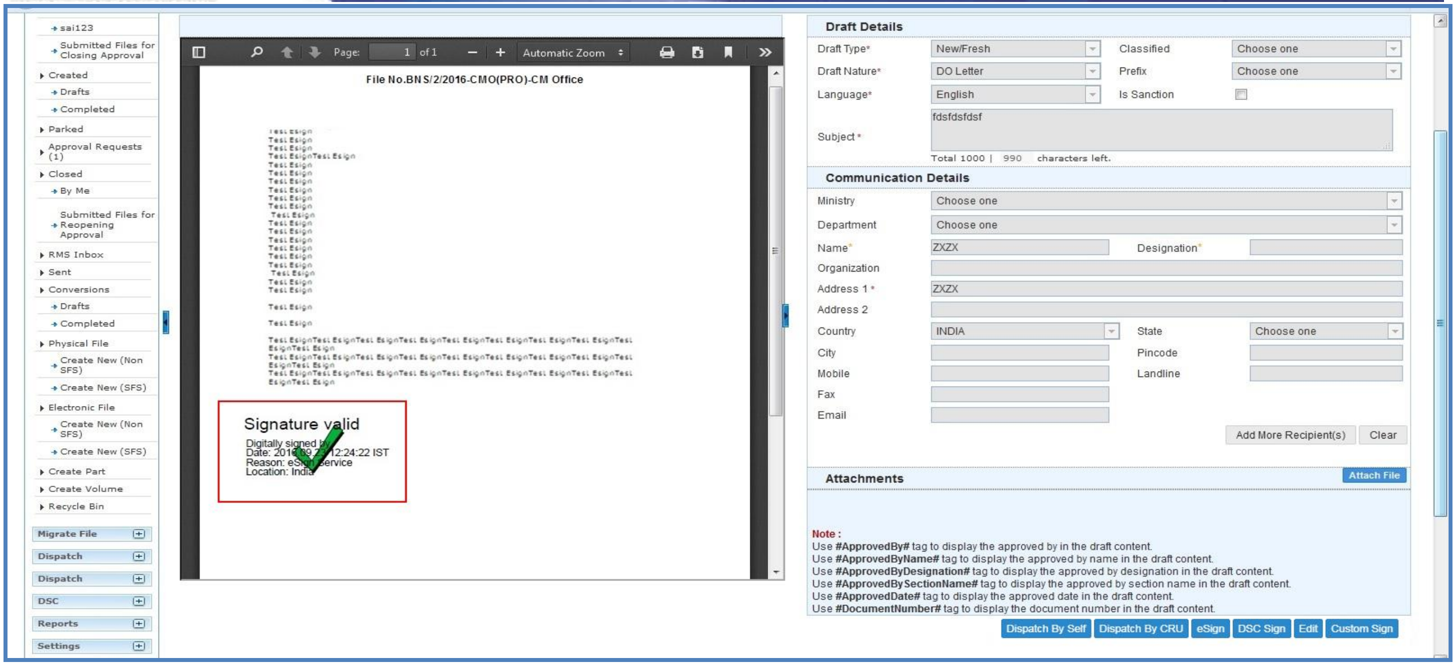


Fig.18

Custom eSigning of DFA

Provision of eSigning Draft at customized/desired Position.

- Create and approve the draft using the draft creation process. The draft dispatch and sign screens will be displayed as shown in **Fig.19**:

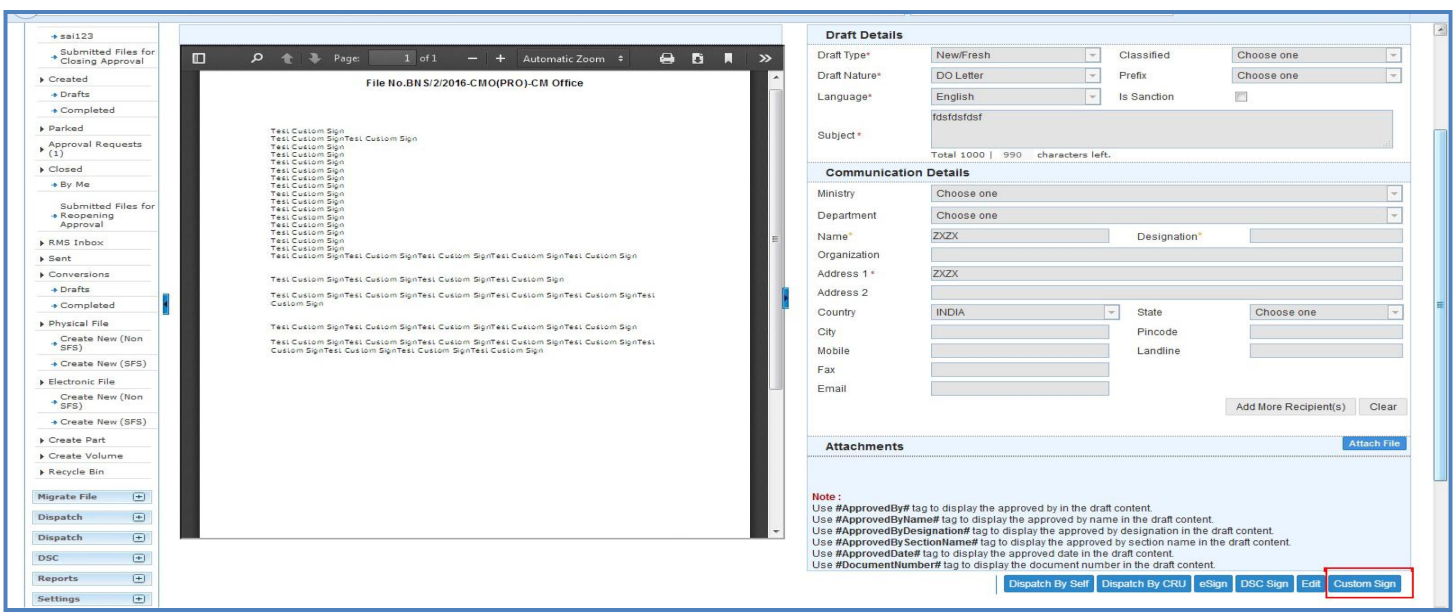


Fig.19

- Click **Custom Sign** button, the Custom Sign pop-up gets displayed as shown in **Fig.20**:

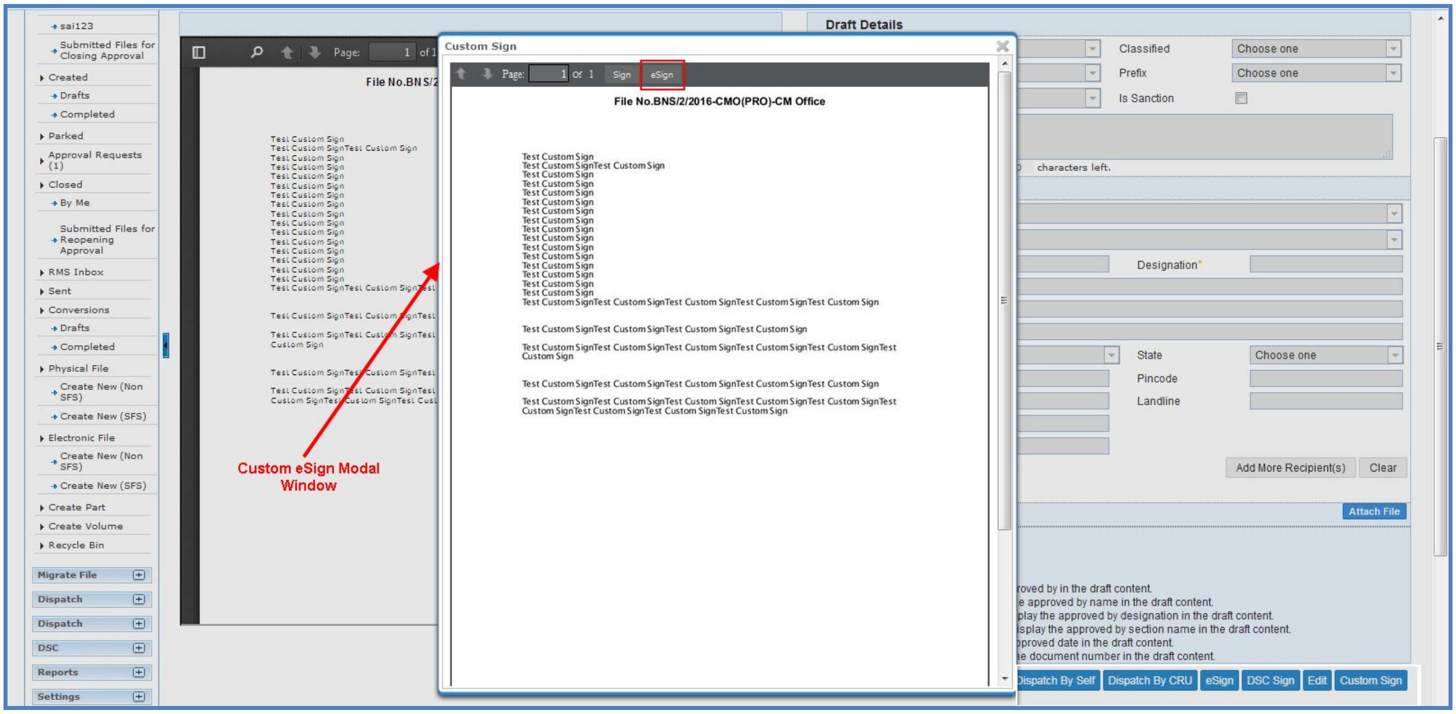


Fig.20

- Locate the desired position on the selected page and click **eSign** button to sign the draft as shown in **Fig.21**:

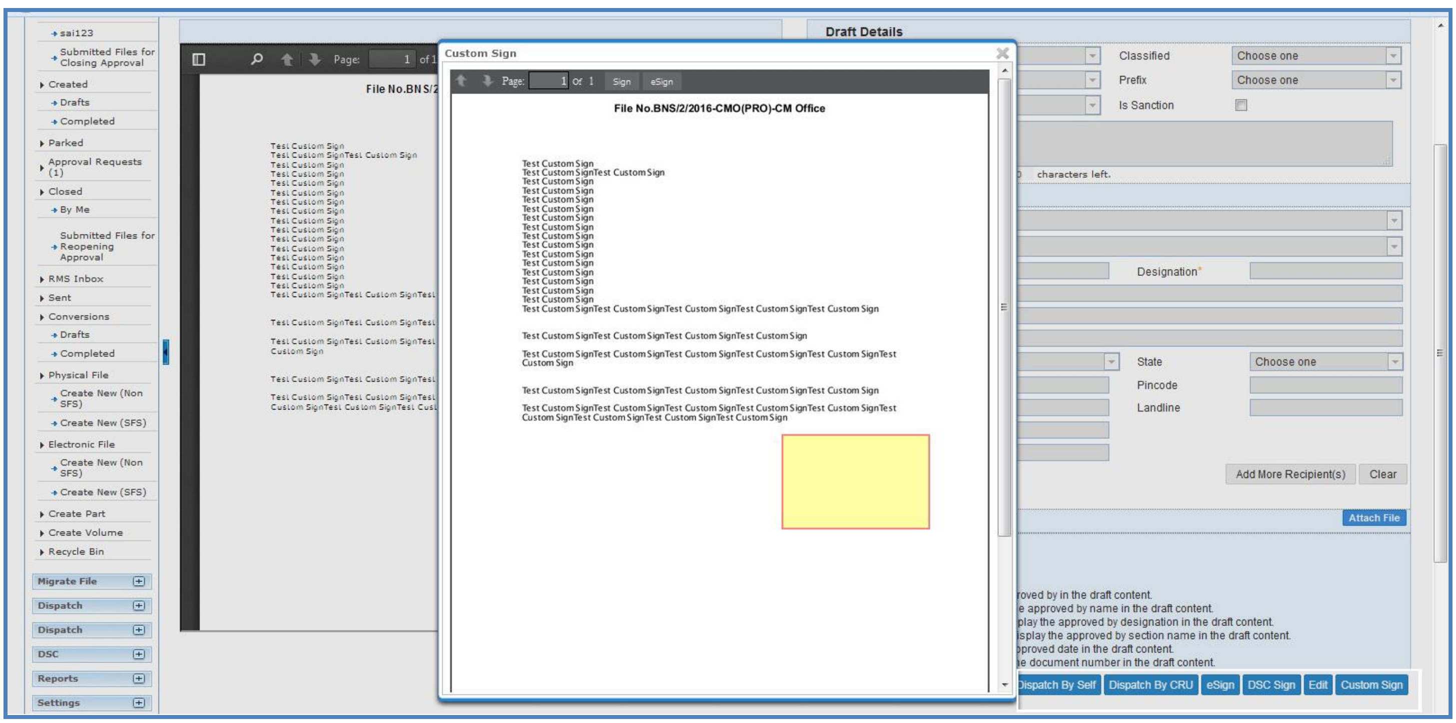


Fig.21

- Consent form will be displayed as shown in **Fig.22**:

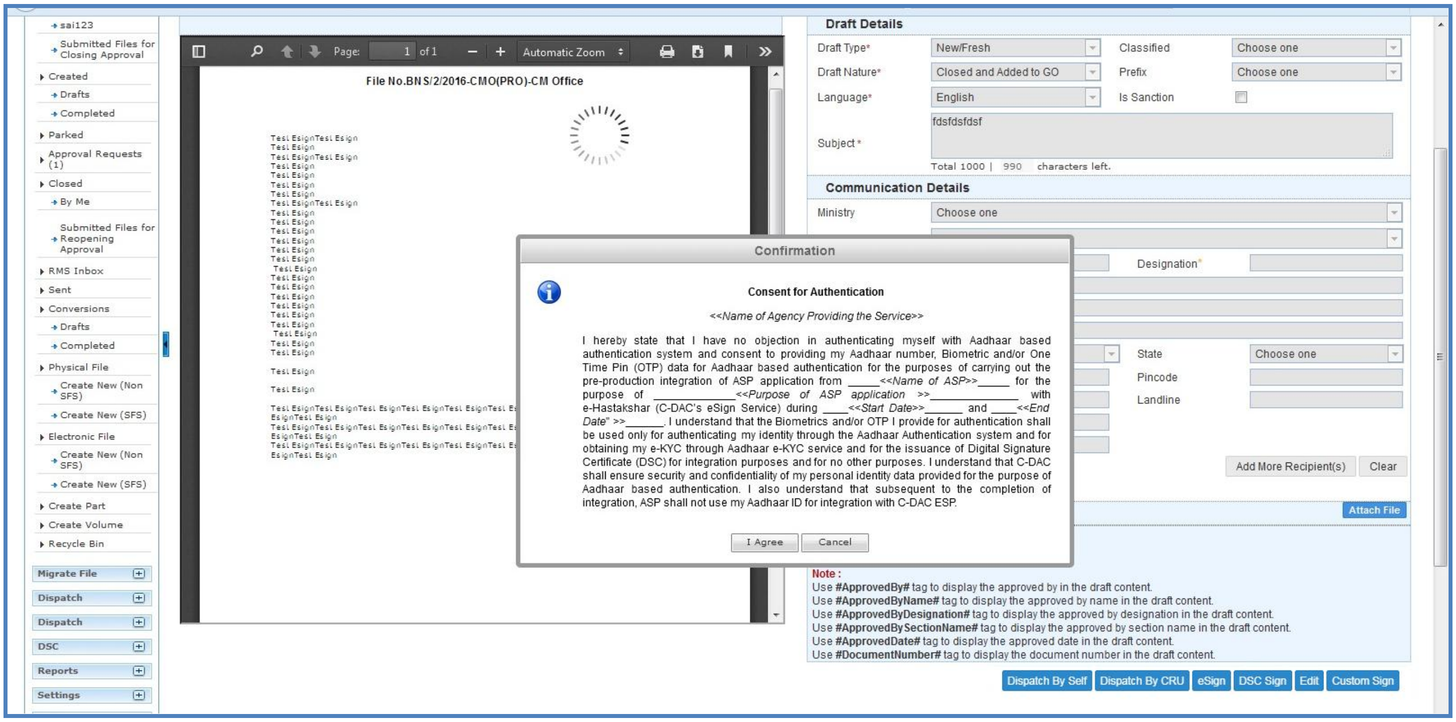


Fig.22

- Click I Agree button to continue the eSigning process.

Note:

If required, cancel the eSigning process by clicking Cancel button.

- eSigning Authentication Gateway screen is displayed.
- Choose the authentication mode as "**Virtual ID**" or "**Aadhar Number**". If user chooses "**Virtual ID**" and clicks Perform eSign button, as shown in **Fig.23:**

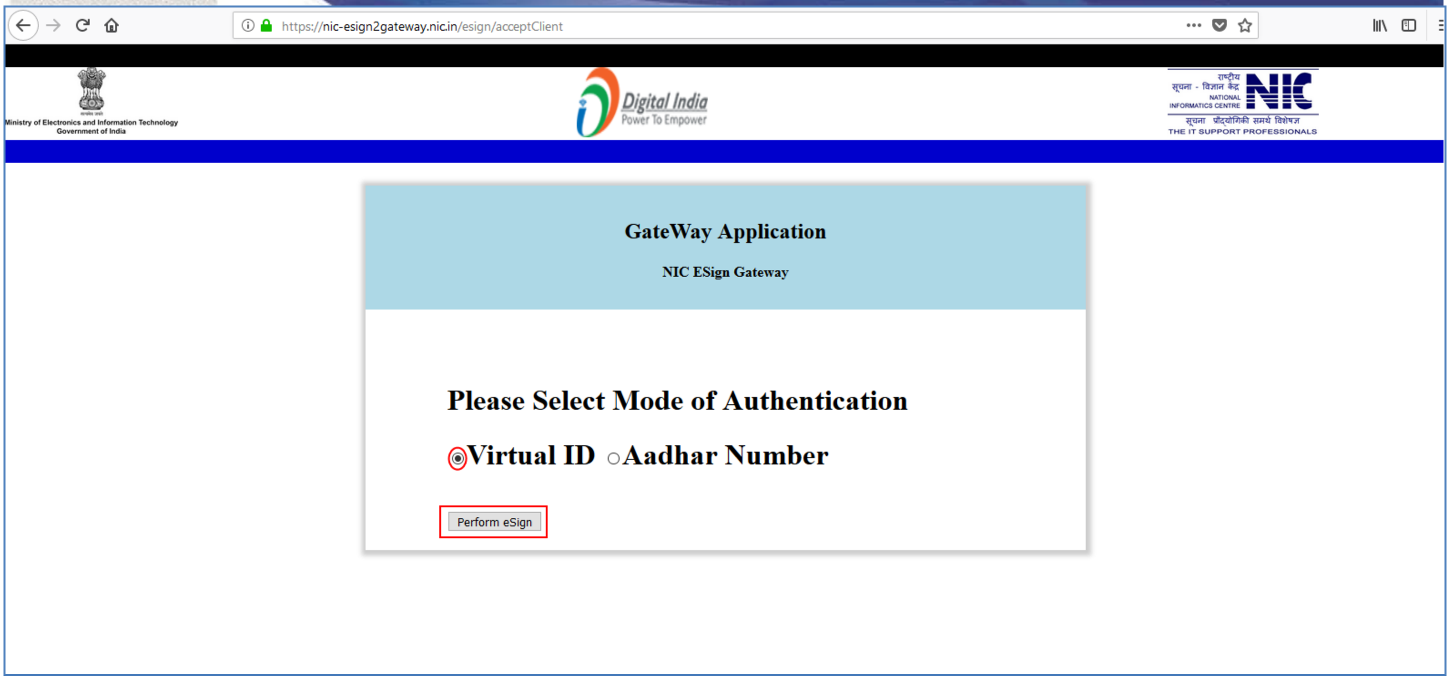


Fig.23

- eSigning screen appears, enter the **sixteen digit Virtual ID** and click **Get OTP** button as shown in **Fig.24**:

Fig.24

Note:

OTP will be received at the mobile number registered for Aadhaar.

- Enter the Aadhaar OTP and select the user consent check box and click on  button as show in **Fig.25**:

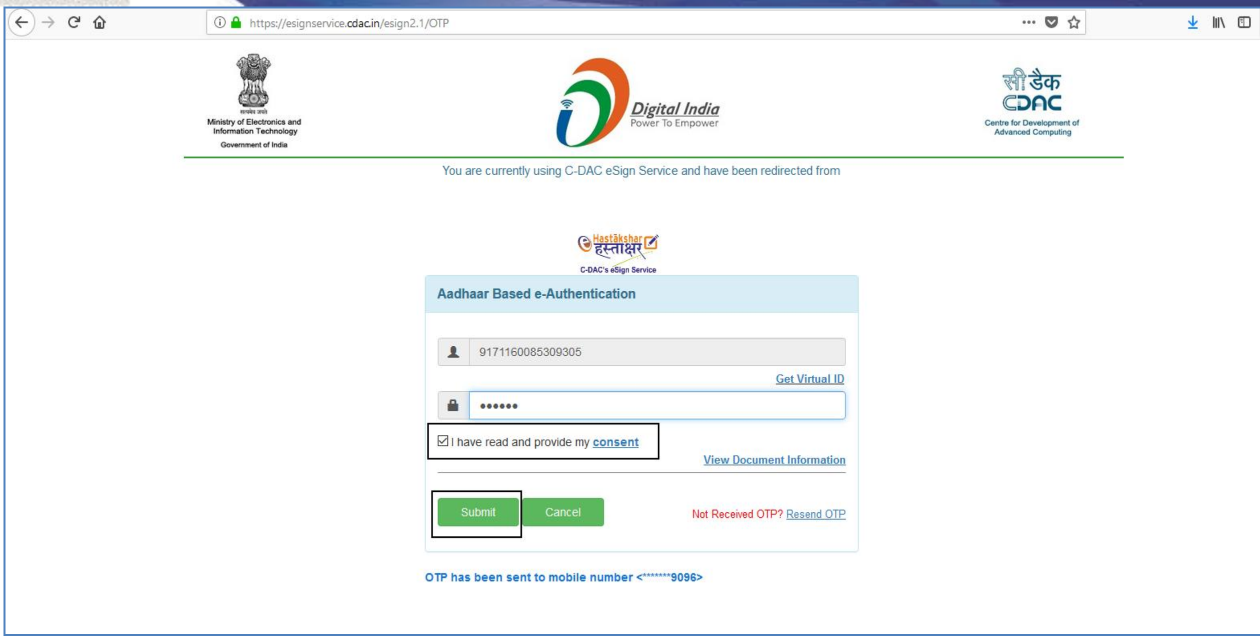


Fig.25

Note:

If user does not have a Virtual ID or forgotten his/her Virtual ID, then click **Get Virtual ID** link to generate/retrieve the Virtual ID link.

- The draft gets eSigned at the desired (custom) position, as shown in **Fig.26**:

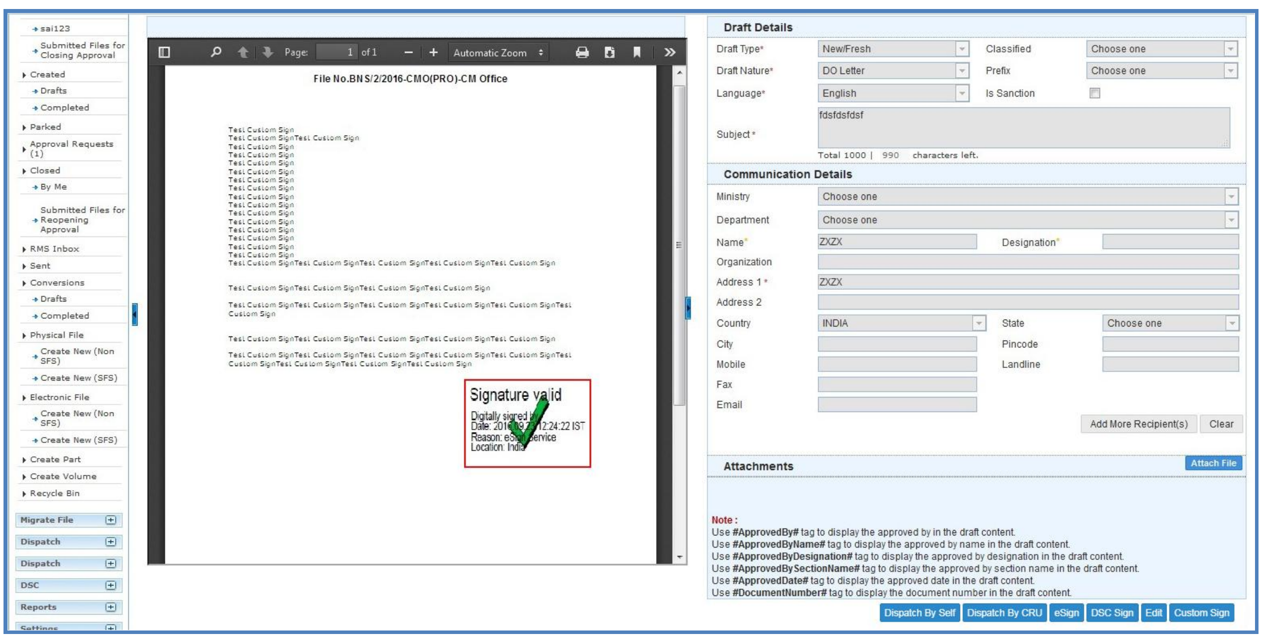


Fig.26

OR

- If user chooses "**Aadhaar Number**" and clicks Perform eSign button.
- eSigning screen appears, enter the **twelve digit Aadhaar ID** and click **Get OTP** button as shown in **Fig.27:**

Fig.27

- Enter the Aadhaar OTP, select the user consent check box, and click Submit button as show in **Fig.28:**

Fig.28

- The draft gets eSigned at the desired (custom) position, as shown in **Fig.29**:

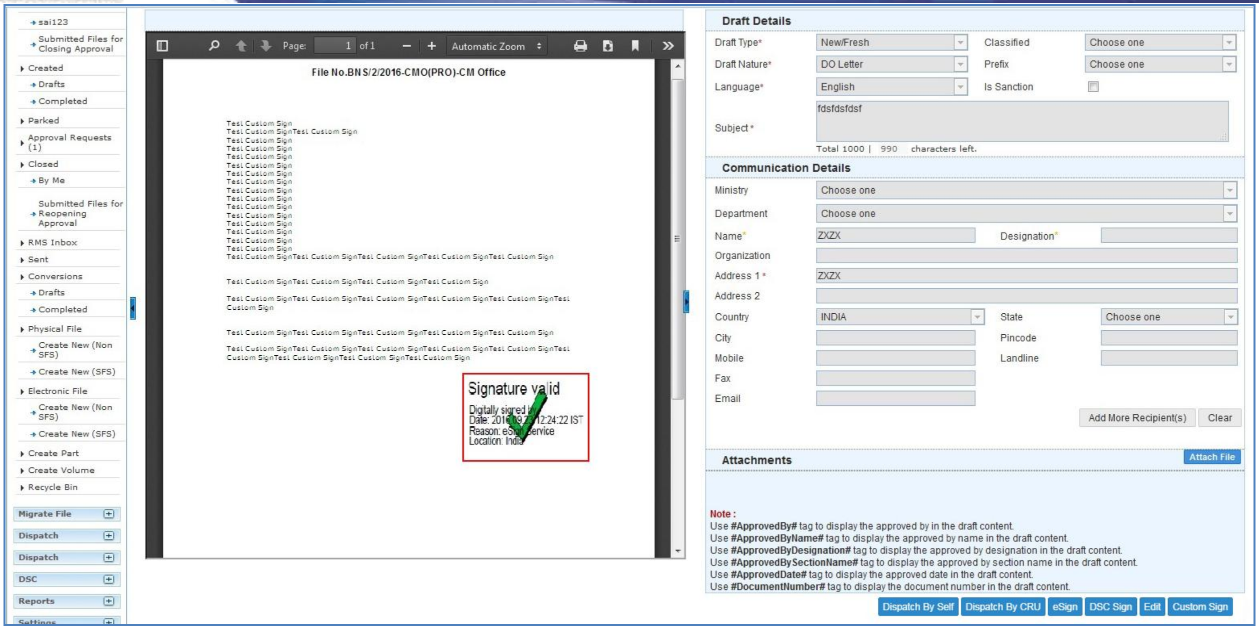


Fig.29

eSign of File Noting

Pre-requisites:

1. License Agreement (Consent of Authentication) should be made between the Department and eSign Service provider to avail the eSign service.

2. Aadhaar No. should be mapped in the EMD.

Note:

This feature is dependent on eSign service provider, so if the service is not available, this feature will not work.

To sign the file while sending the file to the recipient, performing the following steps:

- Select the file from **Inbox** or **Created** list and click Send tab from the menu bar, the **Send** screen as appears is shown in **Fig.30**:

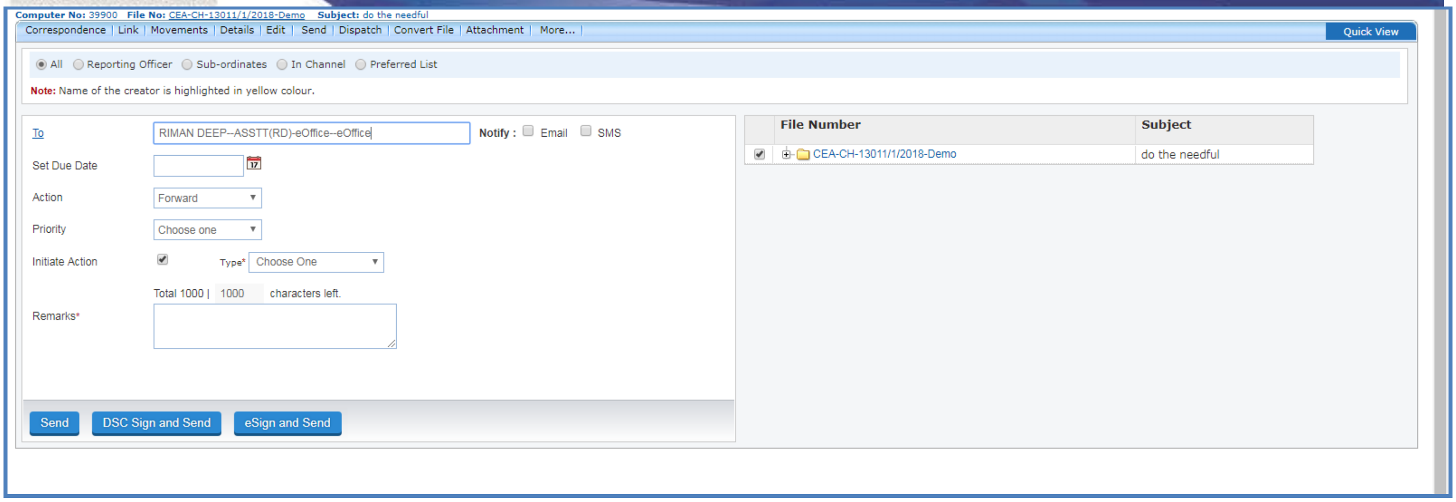


Fig.30

- Enter the mandatory metadata and click eSign and Send button in the Send screen, the Consent form will be displayed as shown in **Fig.31**:

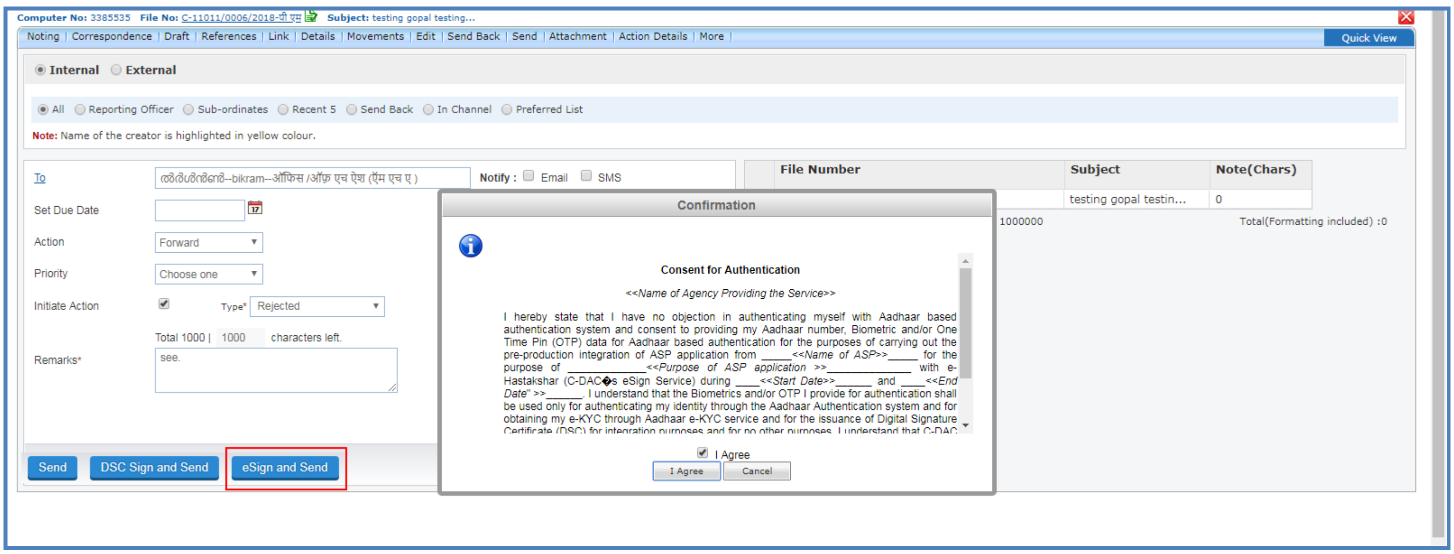


Fig.31

Note:

Remarks field is mandatory for eSign process.

- Click the I Agree button to continue the eSigning process.

Note:

If required, cancel the eSigning process by clicking Cancel button.

- eSigning Authentication Gateway screen is displayed.

- Choose the authentication mode as “**Virtual ID**” or “**Aadhar Number**”. If user chooses “**Virtual ID**” and clicks Perform eSign button, as shown in **Fig.32**:

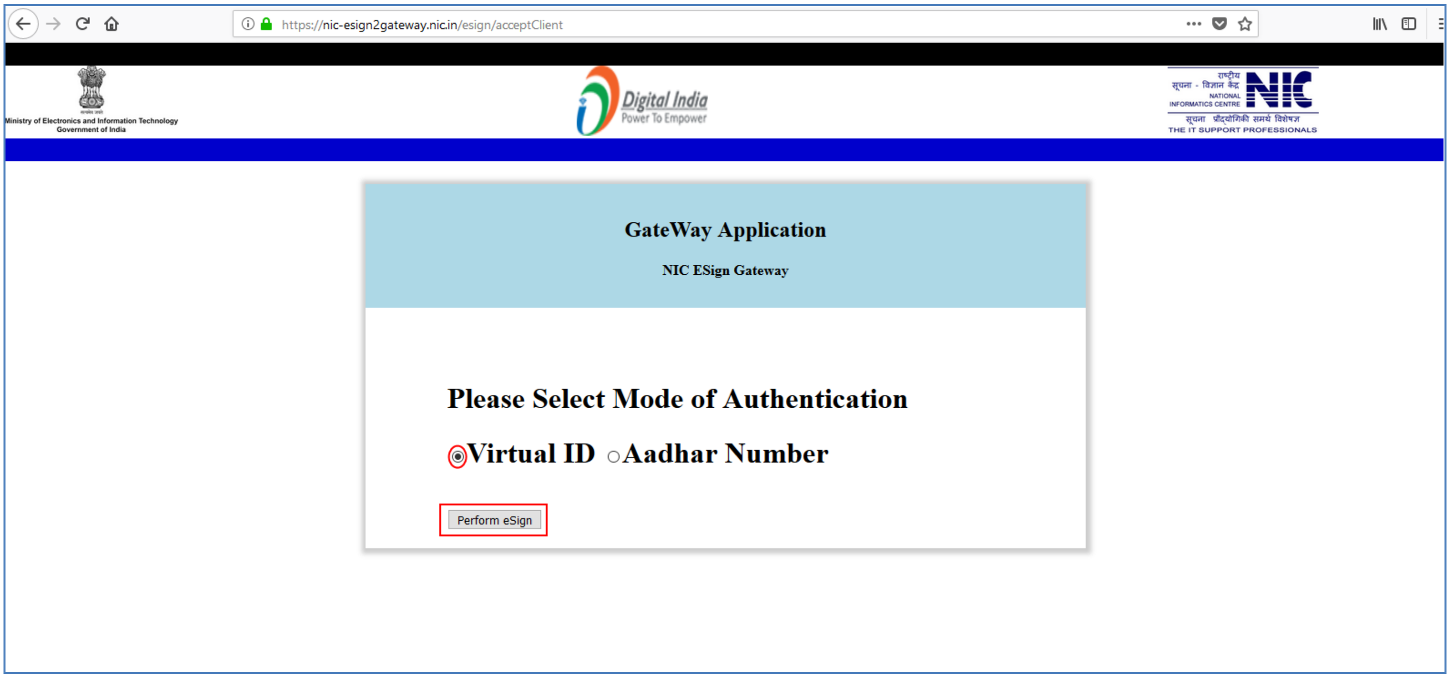


Fig.32

- eSigning screen appears, enter the **sixteen digit Virtual ID** and click **Get OTP** button as shown in **Fig.33**:

Fig.33

Note:

OTP will be received at the mobile number registered for Aadhaar.

- Enter the Aadhaar OTP and select the user consent check box and click on Submit button as show in **Fig.34**:

Fig.34

Note:

If user does not have a Virtual ID or forgotten his/her Virtual ID, then click **Get Virtual ID** link to generate/retrieve the Virtual ID link.

- The file noting gets eSigned as shown in **Fig.35**:

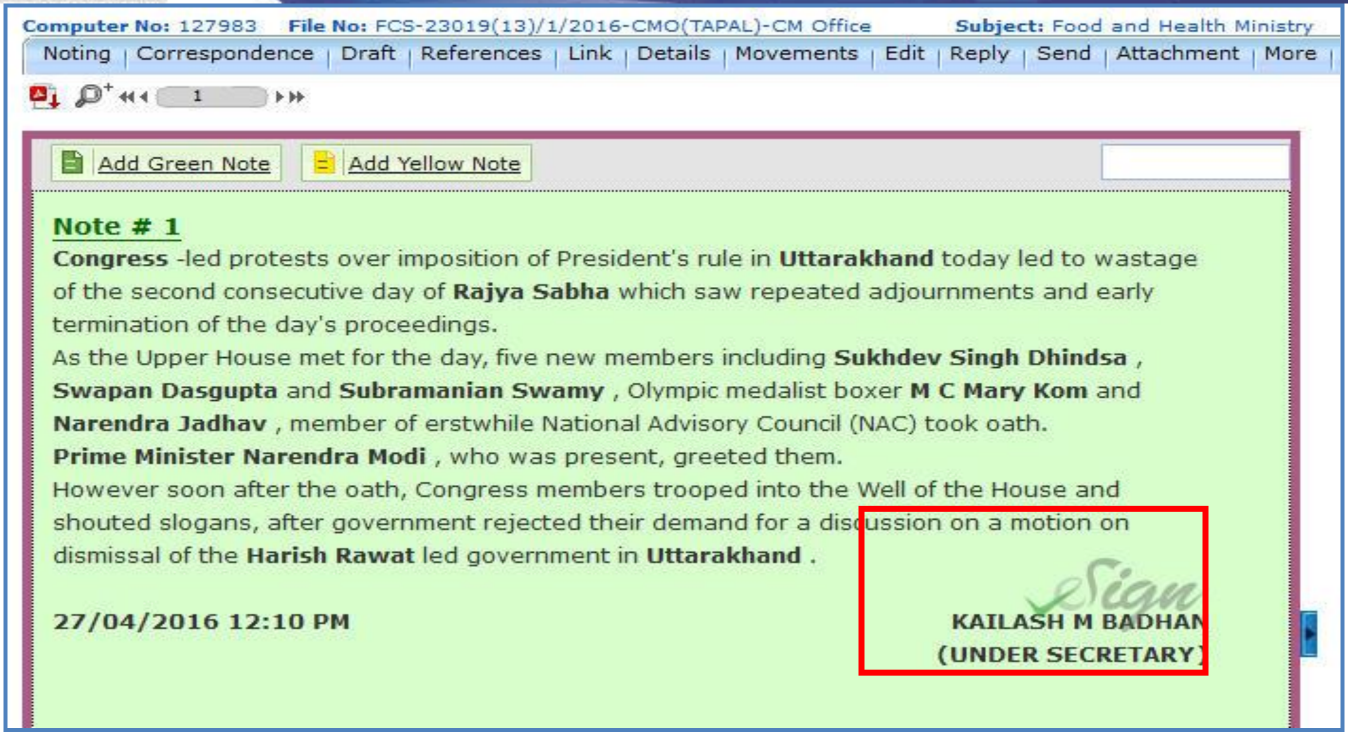


Fig.35

OR

- If user chooses "**Aadhaar Number**" and clicks Perform eSign button.
- eSigning screen appears, enter the **twelve digit Aadhaar ID** and click **Get OTP** button as shown in **Fig.36:**

Fig.36

- Enter the Aadhaar OTP, select the user consent check box, and click Submit button as show in **Fig.37:**

Fig.37

- The file noting gets eSigned as shown in **Fig.38**:

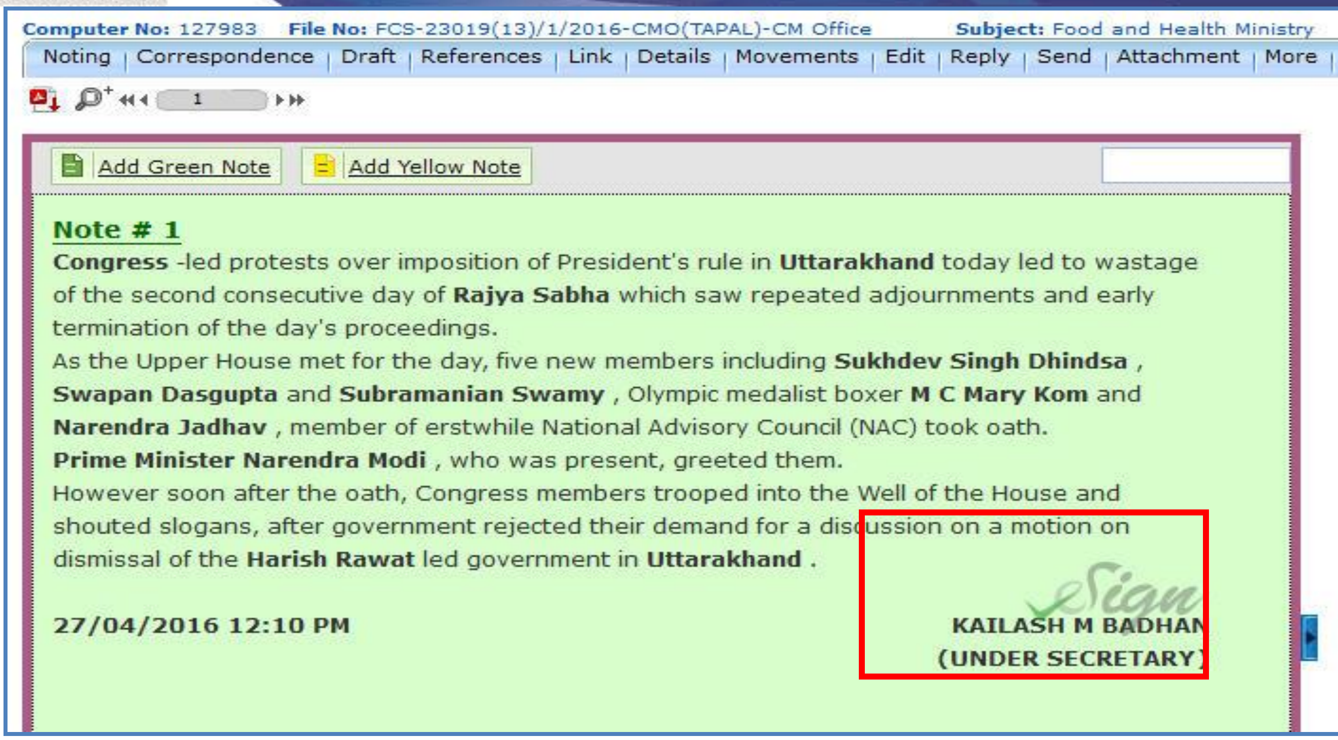

Computer No: 127983 File No: FCS-23019(13)/1/2016-CMO(TAPAL)-CM Office Subject: Food and Health Ministry
Noting | Correspondence | Draft | References | Link | Details | Movements | Edit | Reply | Send | Attachment | More
Add Green Note
Add Yellow Note
Note # 1
Congress -led protests over imposition of President's rule in Uttarakhand today led to wastage of the second consecutive day of Rajya Sabha which saw repeated adjournments and early termination of the day's proceedings.
As the Upper House met for the day, five new members including Sukhdev Singh Dhindsa , Swapan Dasgupta and Subramanian Swamy , Olympic medalist boxer M C Mary Kom and Narendra Jadhav , member of erstwhile National Advisory Council (NAC) took oath.
Prime Minister Narendra Modi , who was present, greeted them.
However soon after the oath, Congress members trooped into the Well of the House and shouted slogans, after government rejected their demand for a discussion on a motion on dismissal of the Harish Rawat led government in Uttarakhand .
eSign
27/04/2016 12:10 PM
KAILASH M BADHAN
(UNDER SECRETARY)

Fig.38

Created By:

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