



A DIGITAL WORK PLACE SOLUTION

eFile

File Management System

QUICK START



Prepared by
National Informatics Centre

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Introduction

eFile is a workflow based system that includes the features of existing manual handling of files with addition of more efficient electronic system. This system involves all stages, 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.

eFile Modules

Different sections that constitute eFile application are receipts, files, dispatch, reports, and so on. Each section comprises of different links that helps the user to easily utilize the functionalities of different sections of the eFile.

First of all, let's learn about how to use the receipts section of eFile.

Receipts

A receipt is a written document that a specified entity has been received as an exchange for services. In eFile, receipts are created by the CRU which is further attached with the file to get processed and approved from the higher authority.

There are various links available under Receipts section which is mentioned below:

- Browse & Diarise
 - a. Physical
 - b. Electronic
- Inbox
- Email Diarisation
- Created
- Sent
- Closed
- Acknowledgement
- Recycle bin

Let's discuss the above points one by one:-

Browse & Diarise

The Browse and Diarise link under receipts section includes two sub modules:

1. Physical
2. Electronic

Let's have an introduction about these sub modules one by one:

- 1. Electronic:** In Electronic Module the browsing or uploading of the scanned document is mandatory and then the Diarisation of scanned correspondence is done.
- 2. Physical:** In Physical Module the browsing or uploading of the scanned document is not mandatory, only the Diarisation of the received correspondence is done for tracking purpose.

In case of DAK that have a classified grading, proper grading levels are assigned to the DAK while diarizing them in case of both Physical and Electronic receipts.

Classification levels are

- Normal
- Confidential
- Secret
- Top Secret

-
- Receipt without attachment can be put in Physical files only.
 - Physical/Electronic Receipt with attachment can be put in Electronic File.
 - Physical Receipt/ Document can be attached with in an Electronic Receipt and Vice-Versa.
 - Also, the receipt attached with other receipts can be send to only one user at a time.
-

- **Browse and Diarise (Electronic Receipts)**

A user needs to perform the following steps:

Step 1: Click the **Electronic** module under **Browse and Diarise** () link of **Receipts** section, as shown in Fig.eFile.1:

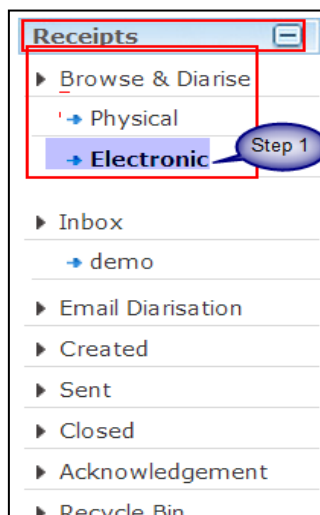


Fig.eFile.1



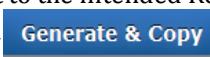
Step 2: Select the Receipt and Click the Upload File () button from the **Browse and Diarise** screen to upload the scanned receipt as shown in fig.eFile.2.

Fig.eFile.2

-
- In case of Classified DAK, uploading of document is not mandatory for CRU, only Delivery mode is mandatory, but when it reaches to the intended recipient or at any section/officer, scanning including all other essential fields is mandatory.
-

Step 3: Enter the essential details in all the mandatory fields in **Browse and Diarise** Page.

Step 4: There are 3 buttons on while browsing & Diarising the details. The buttons functionality is as under:

- Click the **Generate** () button (Fig.eFile.2) on **Browse and Diarise** page to generate a unique diary number.
- If a user clicks on **Generate & Send** () button: To generate a unique Diary number and Send it to the intended Recipient (Fig.eFile.2).
- **Generate & Copy** () button: To generate a unique Diary number and creating a Copy of it (Fig.eFile.2).


Browse and Diarise (Physical Receipt)

Refer **Browse & Diarise** process of Electronic Receipt except, In case of Physical Receipt browsing and uploading of correspondence is Non Mandatory.

- **Actions on Receipt Browse & Diarise**

There are **10** actions provided under Receipt **Browse & Diarise** section:

1. Receive
2. Reply
3. Send

 - **Pull back:** User can also Pull back the sent receipt from the intended recipient even when the receipt is in the Inbox of the recipient, using the Pull Back () link. In case, the recipient has opened the receipt, then pullback option is inaccessible.
 - A user can forward receipt to multiple recipients by using semi colon as separators.

4. Put in File




 - If any File is referenced/attached with the receipt then 'Put in a File' option will not work. For that, a user needs to detach the referenced File.

5. View
 - Unread
 - Read
 - Physical
 - Electronic
 - All
6. Move To
7. Copy
8. Close

 - The receipt in which draft is created and not been dispatched cannot be closed. For that draft needs to be dispatched first then the receipt needs to be closed.

9. Dispatch
10. Reminder

Quick Actions:

- Latest Remarks ()
- Reply ()
- Forward ()

Refer to the **Actions on Receipts** section for details.

Inbox

Inbox option contains the list of all the receipts that are received as an Inward Correspondence/DAK.

- User has to click the Receipt number to view the receipt. As a result, the user can view the content of receipt along with the details.
- Nature of Receipt can be verified from the character 'E' and 'P' which is written before the receipt number.
- Character 'E' symbolizes Electronic Receipt whereas character 'P' symbolizes Physical Receipt.

The steps to view Inbox Receipt are as under:

Step 1: Click on 'Inbox' link under the Receipts section to view all the Inbox receipts, by. As a result the, **Inbox Receipts** screen appears, as shown in Fig.eFile.3:

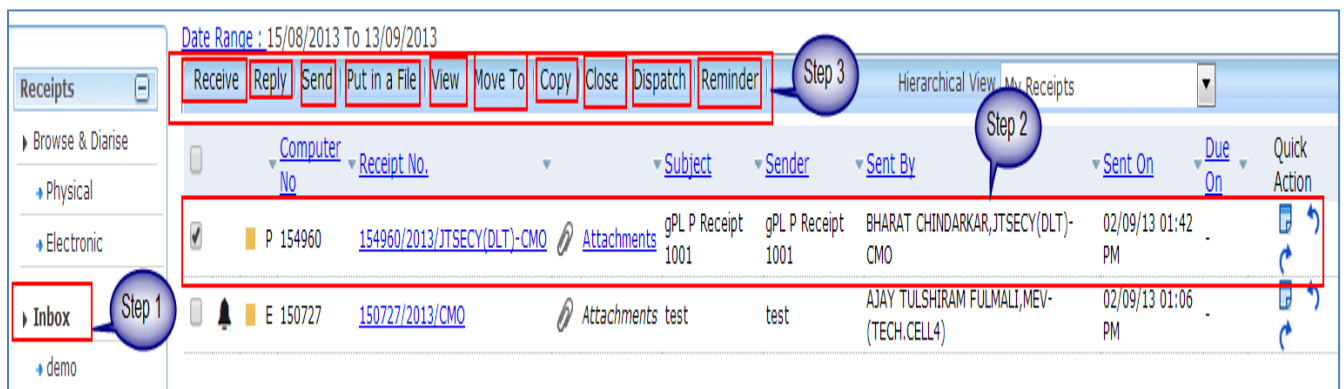


Fig.eFile.3

Step 2: Select the receipt to which action needs to be performed. (Fig.eFile.3)

Step 3: A user can perform any of the below mentioned actions:

There are **10** actions provided under **Receipt Inbox** (Fig.eFile.3)

1. Receive
2. Reply
3. Send
4. Put in File
5. View
 - Unread
 - Read
 - Physical

- Electronic
 - All
6. Move To
 7. Copy
 8. Close
 9. Dispatch
 10. Reminder

Additional Actions: While opening **Electronic/ Physical** receipt a user can view **4 additional actions** including of above actions as highlighted in fig. eFile.4

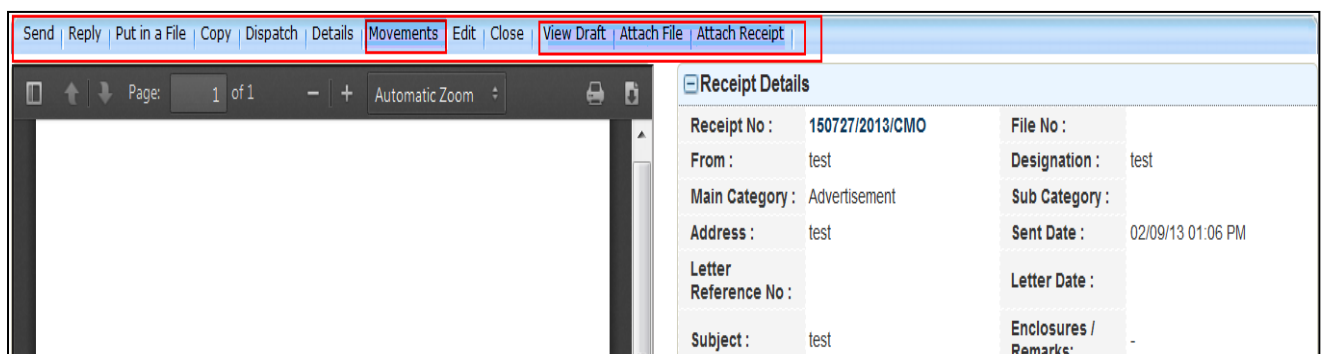


Fig.eFile.4

a) View Draft

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

b) Movements

c) Attach File

d) Attach Receipt

Quick Actions: (Fig.eFile.3):

- **Latest Remarks** (📄) - Shows latest remark given on any particular receipt.
- **Reply** (↩) - It facilitates the user to reply to the sender of the receipt.
- **Forward** (➡) - Forward a particular receipt to one or more recipient at a time.

Refer to the **Actions on Receipts** section for details.

Email Diarisation

During Email Diarisation, email should have been sent to the eFile from NIC Email. User should select the email from NIC Email inbox and Select option **Move To eFile** button.

To perform Email Diarisation to eFile process, user has to perform:

Step 1: Click the **NIC email** link, as shown in Fig.eFile.5:

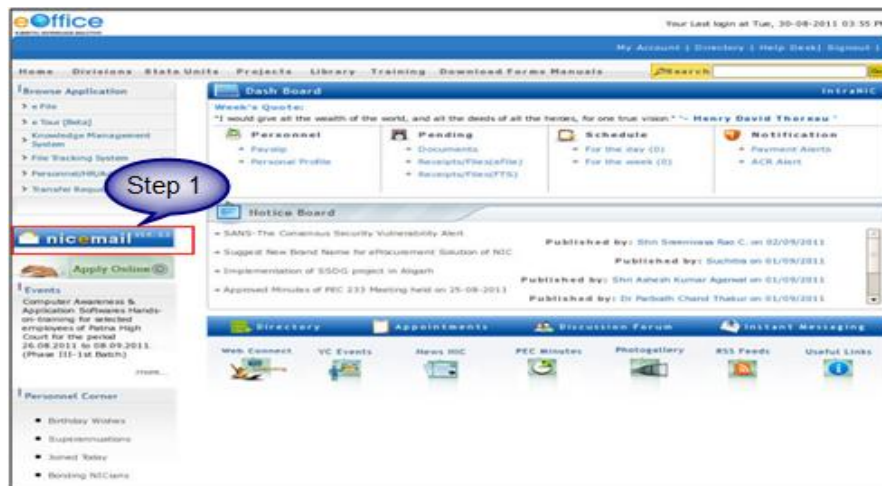


Fig.eFile.5

As a result, NIC email opens.

Step 2: Select the Receipt which needs to be moved to eFile Application.(Fig.eFile.6)

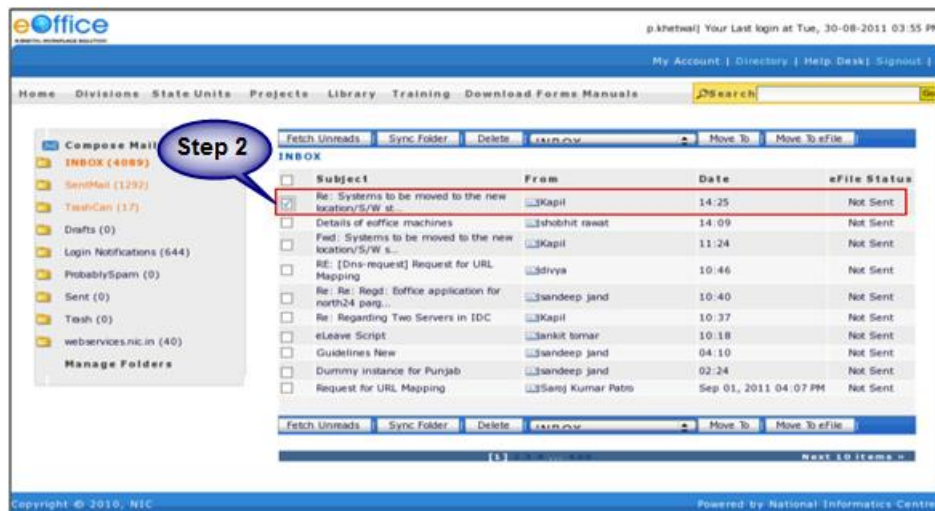


Fig.eFile.6

Step 3: Click the **Move To eFile** button to move the selected receipt to eFile application.(Fig.eFile.7)

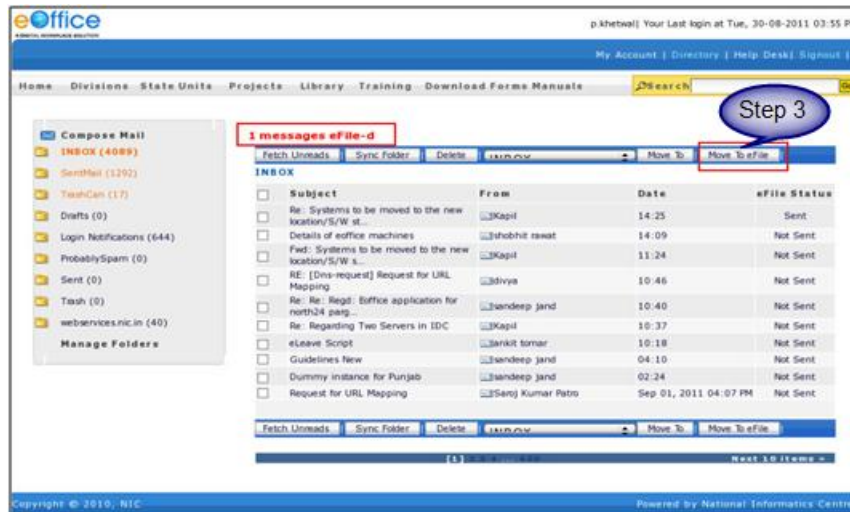


Fig.eFile.7

As a result, sent message appears at top (Fig.eFile.7).

Step 4: Click the **Home** link to move to the **Home Page** of eOffice Portal, as shown in Fig.eFile.8:

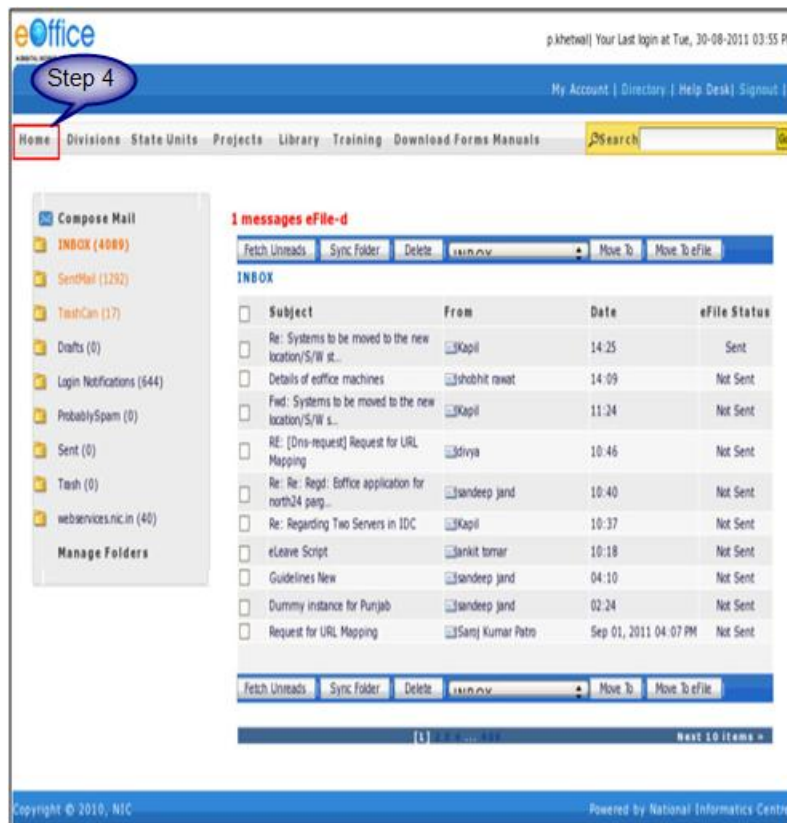


Fig.eFile.8

Step 5: As a result, Home Page of eOffice Portal .Click the **eFile** Link to move into eFile Application (Fig.eFile.9), as a result, eFile application opens as shown in Fig.eFile.9

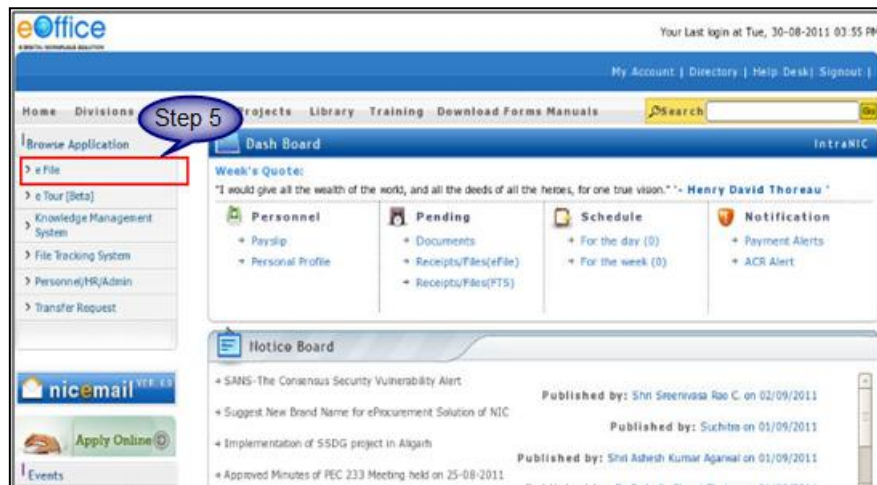


Fig.eFile.9

Step 6: Click the **Email Diarisation** link and then click the moved receipt from the **NIC eMail** Section to diarise it (Fig.eFile.10).

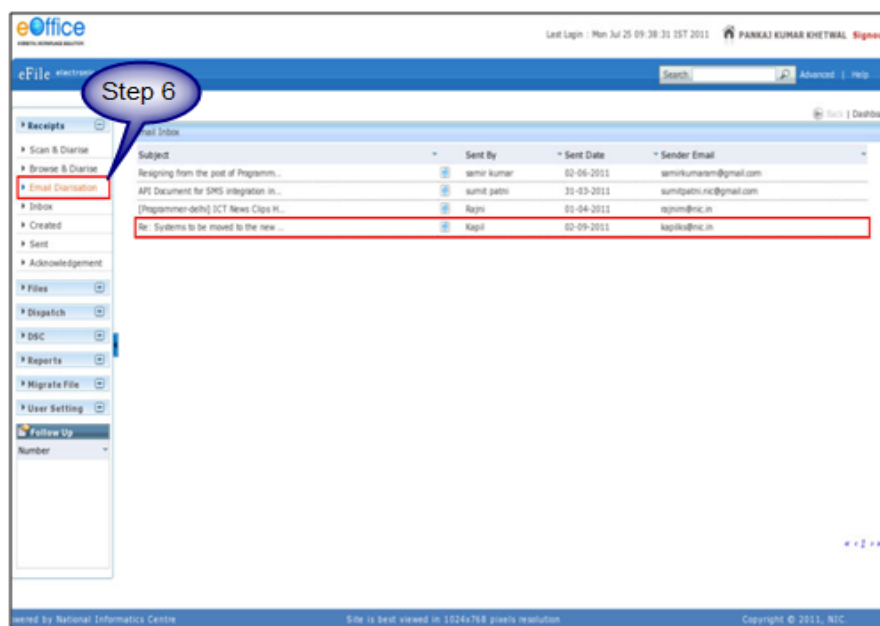


Fig.eFile.10

Step 7: As a result, **Diarisation** page appears. Diarise moved Receipt and click the **Generate Receipt** (Generate Receipt) button (Fig.eFile.11).

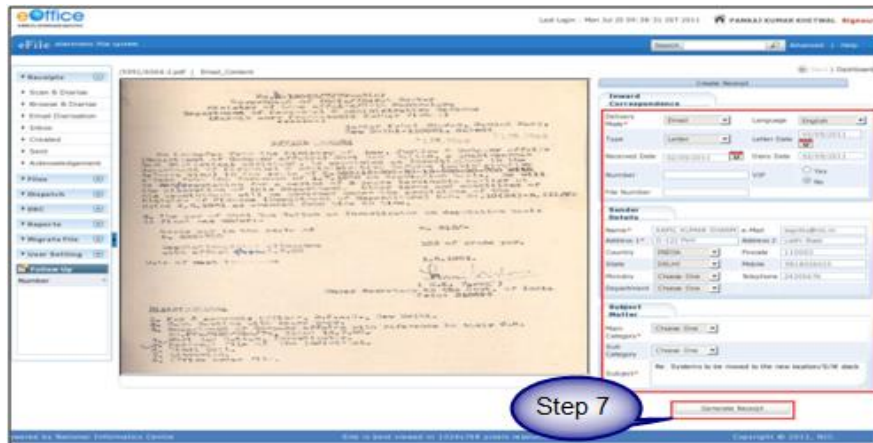


Fig.eFile.11

Created

Created option contains a list of all the receipts that has been diarised by the user but not being marked/sent.

The steps to view created Receipt are as under:

Step 1: Click on 'Created' link under the Receipts section to view all the created receipts, by. As a result the, **Create Receipts** screen appears, as shown in Fig.eFile.12:

Receipts

Browse & Diarise

Physical

Electronic

Inbox

demo

Email Diarisation

Created

Sent

Closed

Acknowledgement

Send

Put in a File

Copy

Dispatch

View

Step 3

Hierarchical View

My Receipts

<input type="checkbox"/>	Computer No	Receipt No.		Subject	Subject Category	Created On		
<input type="checkbox"/>	P 155238	155238/2013/CMO		Attachments	wer	AICC Gen. Secy.	06/09/13 04:40 PM	
<input type="checkbox"/>	E 155152	155152/2013/CMO		Attachments	fff	Bills Payment	04/09/13 04:47 PM	
<input type="checkbox"/>	E 155128	155128/2013/CMO		Attachments	Test	Appointment and othe...	04/09/13 12:40 AM	
<input checked="" type="checkbox"/>	E 155127	155127/2013/CMO		Attachments	dsds	Bills Payment	04/09/13 12:34 AM	
<input type="checkbox"/>	E 155124	155124/2013/CMO		Attachments	gfbhgh	Board and Committee	04/09/13 12:16 AM	
<input type="checkbox"/>	E 155123	155123/2013/CMO		Attachments	gff	ACR related matters	04/09/13 12:08 AM	
<input type="checkbox"/>	E 155021	155021/2013/CMO		Attachments	asdafe	Secretary(CM)	02/09/13 12:41 AM	
<input type="checkbox"/>	E 154981	154981/2013/CMO		Attachments	sdf	ACS to CM	30/08/13 11:50 AM	

Fig.eFile.12

Step 2: Select the receipt to which action needs to be performed.

Step 3: There are 5 actions provided under **Created** Section of receipt:

1. Send
2. Put in a File
3. Copy
4. Dispatch
5. View
 - Physical
 - Electronic
 - All

-
- If user wants to dispatch a receipt from the Created section then the receipt will first move to inbox of that user and then from there, it can be dispatched.
-

Step 4: While opening a Created Receipt, below highlighted actions (Fig .eFile.13) can be performed:

There are **9** actions provided when opening up a **Created** receipt (**Physical/Electronic**):

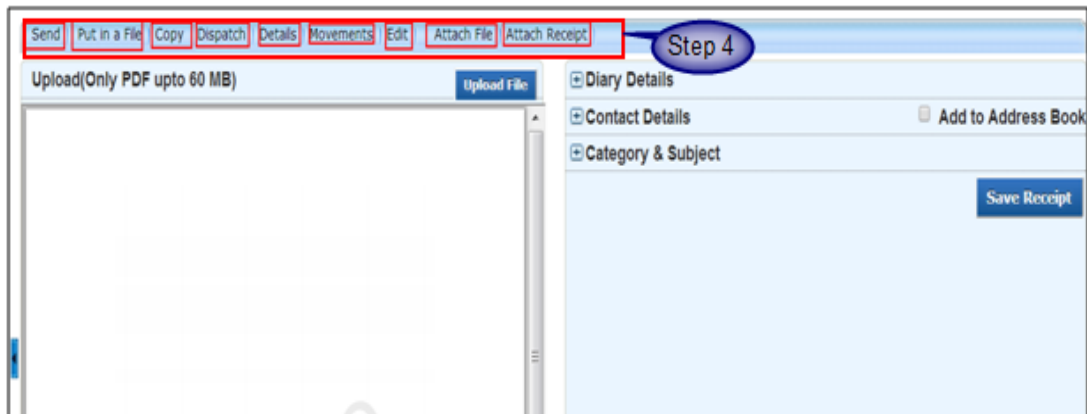


Fig.eFile.13


1. Send
2. Put in a File
3. Copy
4. Dispatch
5. Details
6. Movements
7. Edit

-
- Editing of the metadata is possible after every movement of the receipt, except, Received Date, Diarised Date, Letter Date and Delivery Mode.
-

8. Attach File
9. Attach Receipt

-
- Physical Receipt/Document can be attached with in an Electronic Receipt and Vice-Versa.
 - Also, the receipt attached with other receipts can be send to only one user at a time.
-

Quick Actions: - There are one useful link given under **Created** Section of receipt:

- ❖ **Delete** ()- Deletes the selected receipts, as a result deleted receipt moves to **Recycle Bin** section of Receipts.

Refer to the **Actions on Receipts** section for details.

Sent

Sent option contains a list of all the receipts that are sent as an **outward correspondence**.

Step 1: Click on Sent link under the Receipts section to view all the sent receipts. As a result the, **Sent Receipts** screen appears as shown in Fig.eFile.14:

Computer No.	Receipt No.	Subject	Sender	Sent to	Sent On	Due On
E 123924	123924/2013/CMO(TAPAL)	Attachments	मा. श्री. जयकुमार गोरे	SUNIL DESAI,CMO(CMRF)	12/09/13 03:29 PM	-
P 155214	155214/2013/HSG-ZOPANI-2	Attachments	Adv.Prakashchandra Murlidhar Agrawal	SUNIL DESAI,CMO(CMRF)	12/09/13 03:29 PM	-
<input checked="" type="checkbox"/> E 15777	15777/2013/CMO(TAPAL)	Attachments	आधार कार्ड मिळणेबाबत	SUNIL DESAI,CMO(CMRF)	12/09/13 03:29 PM	-
E 17257	17257/2013/CMO(TAPAL)	Attachments	अधिवेशनाचा कालावधी वाढविण्याबाबत	SUNIL DESAI,CMO(CMRF)	12/09/13 03:29 PM	-
P 155198	155198/2013/CMO(CMRF)	Attachments	rr	SUNIL DESAI,CMO(CMRF)	12/09/13 03:29 PM	-
P 16318	16318/2013/CMO(TAPAL)	Attachments	मा. राज्य माहिती आयोग खंडपीठ नाशिक यांनी दिलेल्या ...	SUNIL DESAI,CMO(CMRF)	12/09/13 03:29 PM	-

Fig.eFile.14

Step 2: Select the receipt to which action needs to be performed.

Step 3: A user can perform any of the below mentioned actions:

There are **4** actions provided under **Sent** Section of receipt as highlighted in the above Fig .eFile.14

1. Send
2. View
3. Copy
4. Reminder

Step 4: While opening a sent Receipt (Physical), below highlighted actions (Fig .eFile.15) can be performed:

Receipt Details	
Receipt No :	155237/2013/CMO
From :	dsf
Main Category :	All matters related to Medical Centre
Address :	dsfsd
Letter Reference No :	
Subject :	dsfds

Movement Details					
Sent By	Sent On	Sent To	Action	Remarks	Received On
EOFFICE ADMINISTRATOR,CMO	10/09/13 11:44 AM	EOFFICE ADMINISTRATOR,CMO			

Fig.eFile.15

There are 5 actions provided while opening a particular **Sent** Electronic Receipt (Fig.eFile.16)

The screenshot shows the eOffice interface. At the top, there is a menu bar with options: Send, Copy, Details, Movements, View Draft. The 'View Draft' button is highlighted with a red box and labeled 'Step 4'. Below the menu bar, there is a document viewer showing a document titled 'Procedure to Install Gemalto Token and Certificate Generation'. The document content includes two sections: '1. Installation of Gemalto Token Driver' and '2. Initializing Gemalto Token:'. To the right of the document viewer, there is a 'Receipt Details' panel. This panel contains fields for Receipt No (155128/2013/CMO), From (Sumit Agarwal), Main Category (Appointment and other related matters of Planning Commission), Address (Mumbai), Letter Reference No, Subject (Test), File No, Designation (dd), Sub Category, Sent Date (20/09/13 12:59 PM), Letter Date, and Enclosures / Remarks. Below the receipt details, there is a 'Movement Details' table.

Sent By	Sent On	Sent To	Action	Remarks	Read On
EOFFICE ADMINISTRATOR,CMO	20/09/13 12:59 AM	EOFFICE ADMINISTRATOR,CMO			

Fig.eFile.16

1. Send
2. Copy
3. Details
4. Movements
5. View Draft

Refer to the **Actions on Receipts** section for details.

Closed

Closed option contains a list of all the receipts that are marked as closed as shown in Fig.eFile.17:

Receipts

Browse & Diarise

Physical

Electronic

Inbox

demo

Email Diarisation

Created

Sent

Closed

Step 1

Re-open

Step 3

<input type="checkbox"/>	Computer No	Receipt No.	File No.	Subject	Closed On	Closing Remarks
<input type="checkbox"/>	155237	155237/2013/CMO		dsfds	12/09/13 09:55 AM	dfgdsgdfgds
<input checked="" type="checkbox"/>	155270	155270/2013/CMO		sdffs	10/09/13 10:33 AM	zx
<input type="checkbox"/>	47153	47153/2013/CMO	G-11012/1/2013-CMO-CMO	test	04/09/13 03:29 PM	XXXXXXXXXXXX
<input type="checkbox"/>	134027	134027/2013/CMO	G-11012/1/2013-CMO-CMO	asd	04/09/13 03:29 PM	XXXXXXXXXXXX
<input type="checkbox"/>	67713	67713/2013/CMO	HOU-06012(10)/1/2013-CMO-CMO-Part(2)	eoffice	19/08/13 11:43 AM	test
<input type="checkbox"/>	6977	6977(2)/2013/CMO	G-11012/1/2013-CMO-CMO	नारिक शहर (TEST RECEIPT)	08/08/13 01:01 PM	don
<input type="checkbox"/>	4816	4816/2013/CMO	A-11011/1/2013-CMO	UID BLANK FORM	04/02/13 04:49 PM	finish

Fig.eFile.17

To Re-open a Receipt (Physical/ Electronic), user has to perform following steps:

Step 1: Click on **Closed** link under the Receipts section to view all the closed receipts. As a result the, **Closed** Receipts screen appears as shown in Fig.eFile.12a:

Step 2: Select the receipt which needs to be Re-Open by clicking on the highlighted checkbox in Fig.eFile.17.

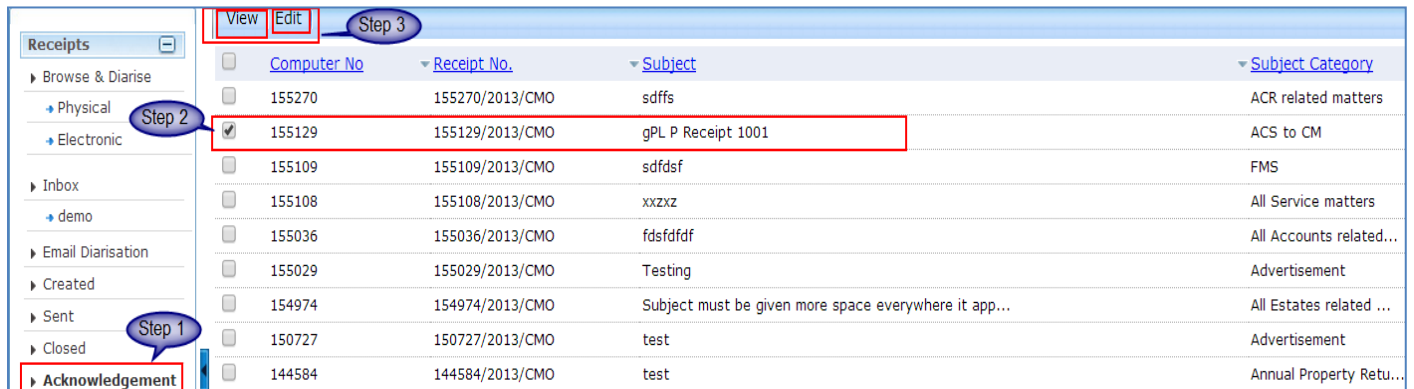
Step 3: A user can perform below mentioned action on closed receipt:

There is **1** action provided while opening a particular **Closed** receipt (Physical/Electronic). (Fig.eFile.17)

1. Reopen: User can re-open the closed receipt anytime by clicking the Re-Open option.

Acknowledgement

Acknowledgement option contains all the receipts that are diarized by the user for which an acknowledgement can be generated.



Computer No.	Receipt No.	Subject	Subject Category
155270	155270/2013/CMO	sdffs	ACR related matters
155129	155129/2013/CMO	gPL P Receipt 1001	ACS to CM
155109	155109/2013/CMO	sdffsf	FMS
155108	155108/2013/CMO	xxzxz	All Service matters
155036	155036/2013/CMO	fdsfdfdf	All Accounts related...
155029	155029/2013/CMO	Testing	Advertisement
154974	154974/2013/CMO	Subject must be given more space everywhere it app...	All Estates related ...
150727	150727/2013/CMO	test	Advertisement
144584	144584/2013/CMO	test	Annual Property Retu...

Fig.eFile.18

To acknowledge a Receipt (Physical/Electronic), user has to perform following steps:

Step 1: Click on **Acknowledgement** link under the Receipts section to view all the receipts that can be acknowledged. (Fig.eFile.18)

Step 2: Select the receipt on which actions needs to be performed as shown in highlighted checkbox in Fig.eFile.18.

Step 3: A user can perform below mentioned actions on acknowledged receipt:

There are 2 actions provided under Acknowledgement Section of receipt as highlighted (Fig.eFile.18).

1. **View:** This link helps the user to view the details of a selected receipt.
2. **Edit:** This link helps the user to generate an acknowledgment for the selected receipt.

Recycle Bin

Recycle Bin option contains list of all the receipts which are deleted from the “**Created**” section of receipts.

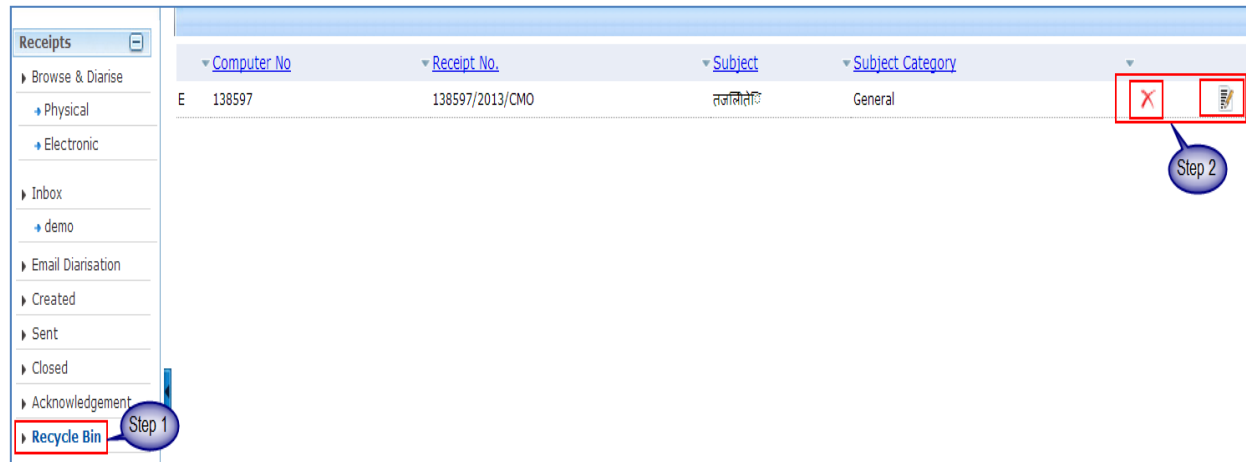




Fig.eFile.19

To Restore/Delete a Receipt (Physical or Electronic), user has to perform following steps:

Step 1: Click on **Recycle Bin** link under the Receipts section to view all the receipts that can be acknowledged. (Fig.eFile.19)

Step 2: Select the receipt on which actions needs to be performed as shown in highlighted checkbox in Fig.eFile.19.

There are 2 Quick Actions provided under Recycle Bin Section of receipt.

- Delete** (): Permanently deletes the selected Receipt.
- Restore** (): The receipts which are deleted from the **Created** section are restored back.

Actions on Receipts:

- a) **Receive:** This link helps the user to receive the **Physical** Receipt. Without receiving the physical receipt user cannot perform any action on that particular receipt.
- b) **Send:** User can use this option to **send** the receipt to the intended recipient.
- c) **Reply:** This link helps the user to reply to the sender of the Receipt.
- d) **Forward:** This link helps the user to forward a particular receipt/s to one or more recipients at a time.

-
- User cannot forward multiple nature receipts i.e. Receipts with Physical nature and Electronic nature cannot be sent simultaneously.
-

- e) **Put in a File:** This link helps the user to attach a receipt/s to a concerned file.
If any File is referenced/attached with the receipt then 'Put in a File' option will not work. For that, First user needs to detach the referenced File.
- f) **View:** This link helps the user to list the receipts depending upon its current state. i.e. (Unread, Read, Physical, Electronic, All).
 - **Unread** - Click the **Unread** from the dropdown menu to view **unread receipts**.
 - **Read** - Click the **Read** from the dropdown menu to view **read receipts**.
 - **Physical** - Click the **Physical** from the dropdown menu to view the Physical nature receipts.
 - **Electronic** - Click the **Electronic** from the dropdown menu to view the Electronic nature receipts.
 - **ALL** - Click the **ALL** from the dropdown menu to view the All receipts altogether.
- g) **Move To:** This link helps the user to create **New Folders** and manage **Existing Folders**.
 - **My Folders** - Click the **My Folders** link from the dropdown menu to view the Receipt inbox and its subfolders.
 - **Manage Folders** - Click the **Manage Folders** link from the dropdown menu to **Delete** or **Edit** the folders created under Receipt Inbox.
 - **Create New Folder** - Click the **Create New Folder** link from the dropdown menu to create a new folder
- h) **Copy:** This link helps the user to copy the metadata fields automatically and send it to other eOffice user. User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' button a new Receipt no. will be allocated to the copied receipt.
- i) **Close:** This link helps the user to close a receipt.

- The receipt, in which draft is created and is not dispatched, cannot be closed. For that draft needs to be dispatched first then the receipt can be closed.

j) **Dispatch:** This link helps the user to **Dispatch** a receipt.

The user has 2 options after filling the required metadata fields which are '**Dispatch By Self**' and '**Dispatch By CRU**'.

- If user selects '**Dispatch By Self**' option, then the physical receipt will be dispatched that same moment and also the receipts gets closed and moves to '**Closed**' section of receipt.
- If user selects '**Dispatch by CRU**' option, a popup appears. Popup contains the list of all the users mapped with CRU section (if any), **Delivery Mode** and **Remarks**.

k) **Details:** User can use this option to view the details of the generated receipts.

4 additional links will be available on opening **Electronic/ Physical** receipt:


a) **View Draft:** User can use this option to view the drafts that are already created.

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

b) **Movements:** User can use this option to track the Movements' of the receipt which automatically gets updated as Receipt moves further.






c) **Attach File:** User can use this option to attach the receipt with the File.

d) **Attach Receipt:** User can use this option to attach the working receipt/document with the other Receipt(s)/Document(s) irrespective of the receipt nature. This link is visible when user opens the receipt from Receipt Inbox/Created.

e) **Edit:** User can use this option to edit the Metadata fields of the Receipt by Clicking the **Edit** link () , as a result the Metadata fields get active.

-
- Editing of the metadata is possible after every movement of the receipt, except, Received Date, Diarised Date, Letter Date and Delivery Mode.
-

Quick Actions: There are some useful Quick Actions in **Receipt module** for such as:

- **Latest Remarks** () - Shows latest remark given on any particular receipt.
() - This image **shows** there is no remark given on any particular receipt.
- **Reply** () - It facilitates the user to reply to the sender of the receipt.
- **Forward** () - Forward a particular receipt to one or more recipient at a time.
- **Delete** () - Deletes the selected receipts, as a result deleted receipt moves to **Recycle Bin** section of Receipts.

Files

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

There are various links available under Files section which is mentioned below:

- Inbox
- Created
 - a. Drafts
 - b. Completed
- Parked
- Closed
- Sent
- Conversions
 - a. Drafts
 - b. Completed
- Physical File
 - a. Create New(Non SFS)
 - b. Create New (SFS)
- Electronic File
 - a. Create New(Non SFS)
 - b. Create New (SFS)
- Create Part
- Create Volume
- Recycle Bin

Let's have an introduction about these Links one by one:

Inbox

Inbox link contains the list of all the Files that are received/ marked by any eOffice user, as shown in Fig.eFile.20:

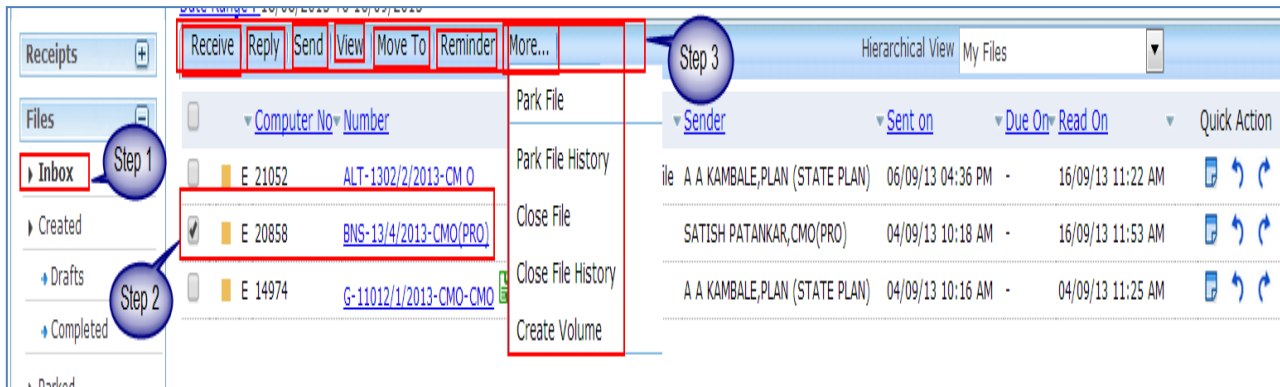


Fig.eFile.20

The steps to view Inbox File are as under:

Step 1: Click on 'Inbox' link under the Files section to view all the Inbox Files. As a result the, **Inbox** Files screen appears, as shown in Fig.eFile.20.

Step 2: Select the File to which action needs to be performed.


Step 3: A user can perform any of the below mentioned actions:

- User has to click the File number to view the File. As a result, the user can view the content of File along with the details. The convention E and P is used to discriminate between Electronic and physical File respectively.

There are 7 links provided under **Inbox** section of Files:

1. Receive

2. Reply

- User can also **Pull back** the Sent File from the intended recipient even when the File is in the Inbox of the recipient, using the Pull Back () link. In case, the recipient has opened the File, then it is not possible to pull back the File.

3. Send

4. View

5. Move To

- My Folders
- Manage Folders
- Create New Folder

6. Reminder




7. More

- Park File
- Park File history
- Close File
- Close File History
- Create Volume

-
- Only creator of the File can close the file, no other person has access to close files.
-

8. **Create Volume:** This link helps the user to create a new Volume of an existing file. Volume file is created with the Volume number suffixed adjacent to the file number.

Quick Actions: - There are some useful links given in inbox for Quick Actions such as:

- **Remarks** () - Shows latest Noting that has been done on that particular File.
- **Reply** () - It facilitates the user to reply to the sender of the File.
- **Forward** () - Forward a particular File to the recipient.

Refer to the **Actions on Files** section for details.

There are **11** actions while opening an **Electronic file**:

1. Noting
 - View By Name
 - View By Date
 - View All
2. Correspondence
3. Draft
 - Create New Draft
 - View Draft
4. References
 - Local Reference
5. Link
 - Internal Files
 - Referred in Files
6. Details
7. Movements
8. Edit
9. Reply
10. Send
11. Attachment
 - File
 - Receipt
12. More
 - Close File
 - Park File
 - Park File History
 - Close File History
 - Merge Details

Refer to the **Electronic Files** section for details.

There are **11** actions while opening a **Physical file**:

1. Correspondence
2. Link
 - Internal Files
 - Referred in Files
3. Movements
4. Details
5. Edit
6. Reply
7. Send
8. Dispatch
9. Convert File
10. Attachment
 - File
 - Receipt
11. More
 - Close File
 - Park File
 - Park File History
 - Close File History
 - Create Volume
 - Merge Files
 - Merge Details

Refer to **Physical Files** section for Details

Created

Created files link includes:

- **Drafts:** The Files whose File numbers has not been generated and kept as draft to work later on.

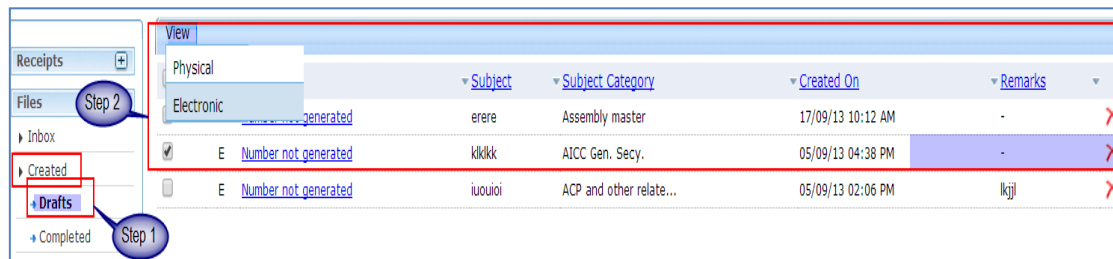




Fig.eFile.21


The steps to view Drafts file are as under:

Step 1: Click on **Created** -> **Drafts** link under the Files section to view all the draft files created. As a result, Draft Files screen appears, as shown in Fig.eFile.21.

Step 2: Select the File to which action needs to be performed. A user can perform below mentioned actions:

The actions provided under **Drafts** Section of file as highlighted in the above Fig .eFile.21

1. **View:** Click on **View** option to list the Files (P/E) depending upon its current state.
 - **Physical-** Go to **Physical** option under **View** to view all Physical Files.
 - **Electronic-** Go to **Electronic** option under **View** to view all Electronic Files.
2. **Delete** (): Click on **Delete** () option to delete the selected files.

-
- The Files in the Draft option can be deleted and sent to Recycle Bin using Delete () link.
-

- **Completed:** The files whose file number has been generated but not marked/sent to any other eOffice user.

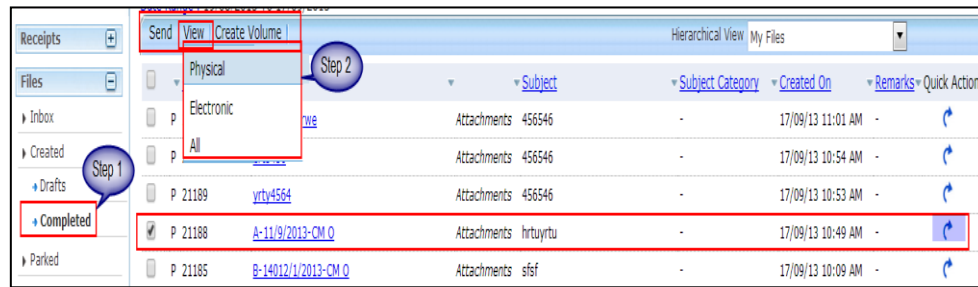


Fig.eFile.22

The steps to view Completed file are as under:

Step 1: Click on **Created -> Completed** link under the Files section to view all the files whose file number has been generated. As a result, Completed Files screen appears, as shown in Fig.eFile.22.


Step 2: Select the File to which action needs to be performed as shown in Fig.eFile.22.

There are **3** actions provided under **Completed** link of **Created** File Section:

1. **View:** Click on **View** option to list the Files (P/E) depending upon its current state.


- **Physical-** Go to **Physical** option under **View** to view all Physical Files.
- **Electronic-** Go to **Electronic** option under **View** to view all Electronic Files.
- **All-** Go to **Electronic** option under **View** to view all the Files.

2. **Send:** Helps the user to forward a particular File/s to the recipient.

- User can also Pull back the Sent File from the intended recipient even when the File is in the Inbox of the recipient, using the Pull Back () link. In case, the recipient has opened the File, then it is not possible to pull back the File.

3. **Create Volume:** Helps the user to create a new Volume of an existing file.

Quick Action: There are some useful links given in inbox for Quick Actions such as:

- **Forward** () - Forward a particular File to the recipient.

Parked

This contains a list of all the Files that are temporary closed and work will be done later on. Parked files can be made active at any point of time.

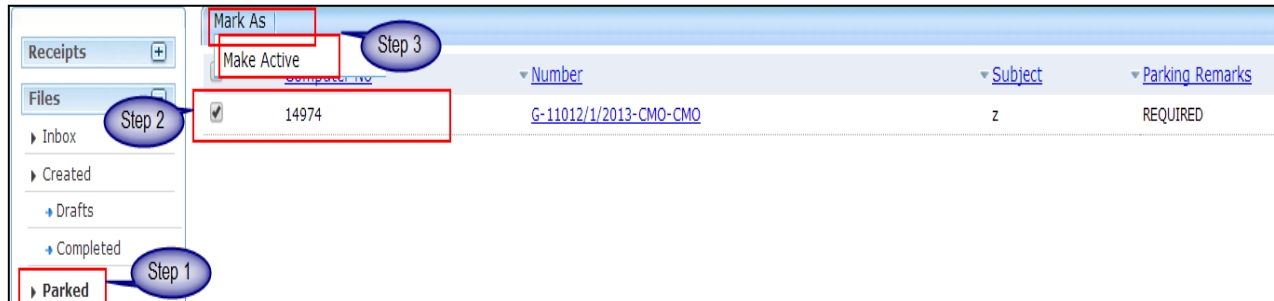


Fig.eFile.23

- Pendency of File will be removed if a particular file is parked.

To make Parked File as Active File, user has to perform the following steps:

Step 1: Click on '**Parked**' link under the Files section to view all the parked Files. (Fig.eFile.23)

Step 2: Select the File/s to which action needs to be performed.

Step 3: The **Action** provided under Parked link of File Section:

There is **1** action provided under **Parked** link of **File** Section:

1. **Mark As:** Scroll mouse over '**Mark As**' Link and click the **Make Active** option under it.
As a result, the Files become active and move to the File Inbox.

Closed

Closed link contains a list of Files that are closed as complete work has been done on it already. Closed Files can be made active at any point of time.

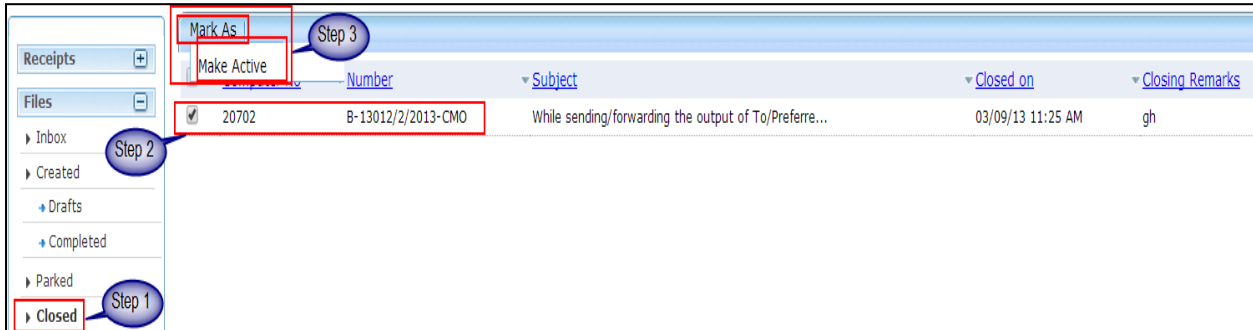


Fig.eFile.24

To make Closed File in the Active File, user has to perform the following steps:

Step 1: Click on **Closed** to view all the closed files.

- Only creator of the File can close the file, no other person has access to close files.

Step 2: Select the File/s to which action needs to be performed as shown in Fig.eFile.24

Step 3: The action provided under **Closed** link of **File** Section:

- Mark As:** Scroll mouse over '**Mark As**' Link and click the **Make Active** option under it. As a result, the Files become active and move to the File Inbox.

Sent

Sent option contains a list of all the Files that are sent as an **outward correspondence**.

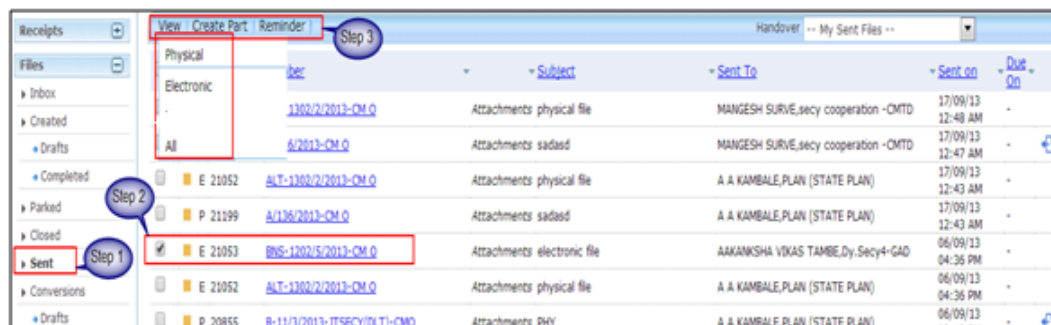


Fig.eFile.25

The steps to view Sent file are as under:


Step 1: Click on **Sent** link under the Files section to view all the files that are sent. As a result, Sent Files screen appears, as shown in Fig.eFile.25

Step 2: Select the File to which action needs to be performed .

There are 3 links provided under **Sent** section of File:

a) **View:** Helps the user to list the Files depending upon its current state (Physical, Electronic, Followed Up, All).

- **Physical**-Click the **Physical** from the dropdown menu to view the **Physical** Files.
- **Electronic**-Click the **Electronic** from the dropdown menu to view the **Electronic** Files.
- **All** - Click **All** to view all the Files.

• User can also Pull back the File from the intended recipient even when the File is in the Inbox of the recipient, using the Pull Back () link. In case, the recipient has opened the File, then it is not possible to pull back the File.

b) **Create Part:** User can use this option to create a **Part file** of the existing file which is under submission.

-
- Part Files cannot be created if the file is already in File inbox.
-

c) **Reminder:** Reminder process facilitates the user to set notification for themselves or for other eOffice users. It can be implied on Files, Receipts and Drafts.

Conversions

This module contains the Files which are in process of conversion or converted already.

It contains 2 sub modules:

- Drafts
- Completed

Let's learn these modules one by one:

Drafts: This module 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' button, then files moves under this module.

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

Step 1: Click on **Drafts** under **Conversions** section. As a result following page appears as shown in Fig.eFile.26.

Step 2: Click on the link under **File Number** to open the draft. As a result the draft file opens up as shown in Fig.eFile.26.

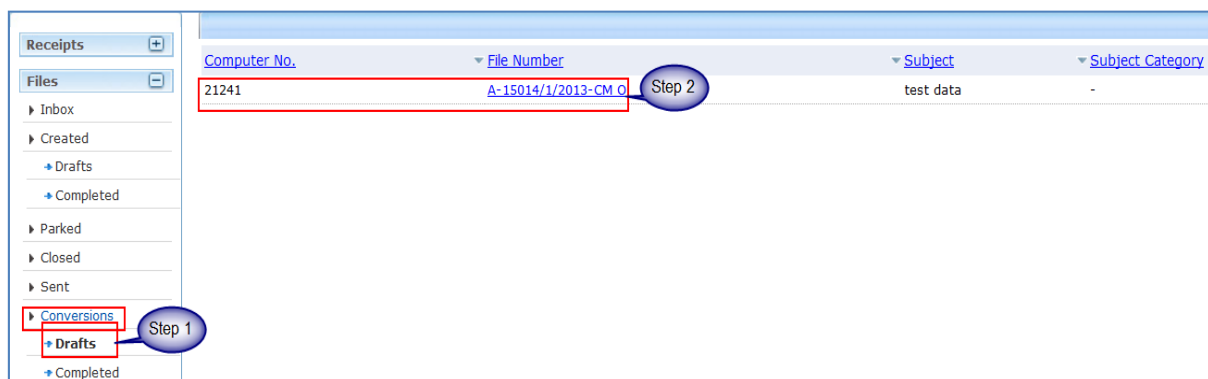


Fig.eFile.26

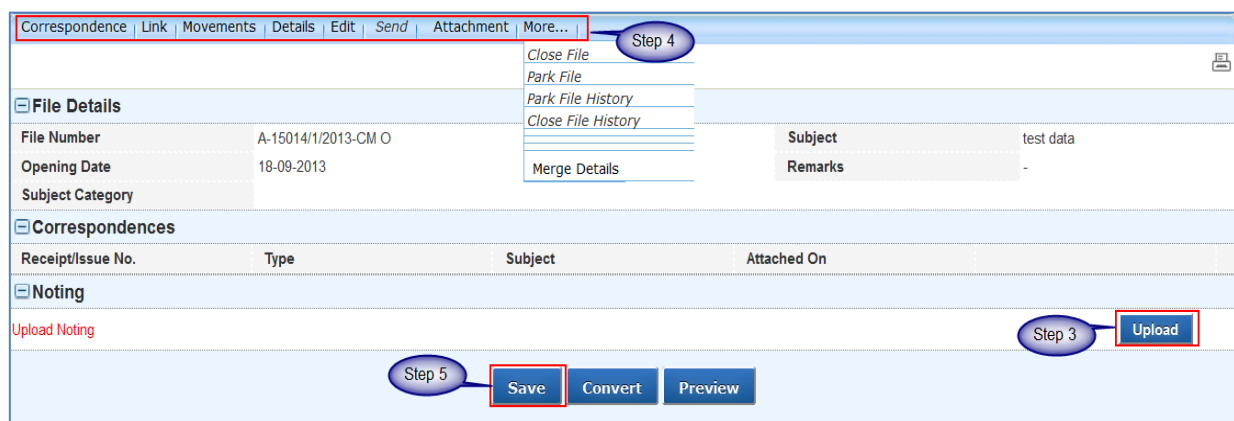


Fig.eFile.27

Step 3: Under '**Noting**' section, user can upload a noting document (Fig.eFile.27).

Step 4: There are **8** actions provided after opening a **Draft** file:

- a) Correspondence
- b) Link
 - Link Files
 - Referred In Files
- c) Movements
- d) Details
- e) Edit
- f) Send
- g) Attachment
 - File
 - Receipt
- h) More
 - Close file
 - Park File
 - Close file History
 - Park File History
 - Merge Details

Step 5: Click on **Save**  button to save the details.

Completed: This module contains the entry of all files which have already been converted from Physical to Electronic, as shown in Fig.eFile.28:

Computer No.	File Number	Subject	Subject Category	Converted By	Converted On	Remarks
5539	Created_Now_After	Created_Now_After	-	ALOK PANDEY	20/05/13 12:14	Converted
5475	A/61/2013-CC	dsgsg	-	ALOK PANDEY	10/05/13 11:20	Converted
5474	B/111/2013-CC	adsfff	-	ALOK PANDEY	10/05/13 11:03	Converted
5460	D-14012/4/2013-CC	xzcxcz	-	ALOK PANDEY	09/05/13 05:04	Converted
5471	ertert	ertert	AMC & Demand	ALOK PANDEY	09/05/13 04:10	Converted

Fig.eFile.28

Physical File

Physical File option under the Files section helps the user to create a Physical File.

- **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.
- **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 Physical File in Non-SFS mode, user has to perform the following:

Step 1: Open **Create New (Non-SFS)** by clicking on the option under **Physical File** as shown in **Fig: eFile.29**

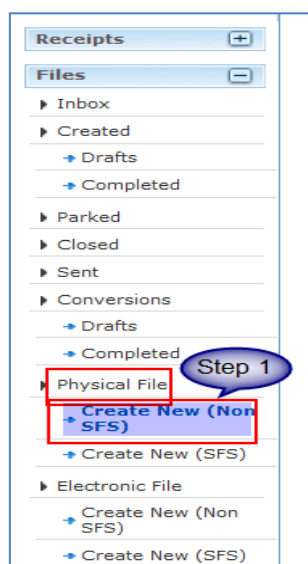


Fig.eFile.29

As a result, File Cover Page screen appears, add the File No.

Fig.eFile.30

Step 2: Enter the necessary details on the File Cover Page. **Subject Description** is a Mandatory field along with File no.

Step 3: After filling the necessary details, click the **Continue Working** () button to create a new physical file. As a result file gets created.

User can perform same operations on a **Create New (SFS)** file as explained in Create Non-SFS file

There are **11 actions** provided on opening a **Physical File**.

a) Correspondence: With the help of this feature user can attach physical correspondence/Receipt to the working File.

b) Link: With the help of this feature user can Link and delink other eFile(s) to the working file.

It contains **2** sub links:

- **Internal Files:** This sub link helps the user to link/delink any other file from within the Organization.
- **Linked In Files:** This sub link helps the user to view other Files that are linked from some other Organization with the working file.

c) Movements: With the help of this feature user can see the movement of a File i.e. the details of all the users who has worked on it.

d) Details: With the help of this feature user can see the details of a File i.e. total no. of part Files created, TOC receipt, Dispatch Movement History and Linked Files.

e) Edit: With the help of this feature user can make changes to the cover page of existing running file except the Basic and corresponding Heads.

f) Reply: With the help of this link user can send a reply to the intended person.

g) Send: With the help of this feature user can send the File to the Recipient.

h) Dispatch: With the help of this feature user can Dispatch the receipt to the Recipient of different Ministries or Office.

i) Convert File: Helps the user to convert the Physical File to Electronic File only irrespective of the File location, weather it is attached with a receipt or from the File inbox/Created Section.

j) Attachment: This link facilitates the user to attach other files or receipts with the working File.

k) More Action: With the help of this feature user can Park or Close the working file.

- **Close File:** Only creator of the File can close the file, no other person has access to close files.
- **Park File:** Parked File contains files that are temporary closed and work will be done later on.
- **Park File History:** Displays the history of the Parked file.
- **Close File History:** Displays the history of the closed file.
- **Create Volume:** With the help of this feature, user can create a new Volume of an existing file.
- **Merge Files:** This link facilitates the user to merge physical files only. Merged file will be in '**View only**' mode.

-
- User can **De-Merge** or Merge the Merged File with any other File also by using the '**De-Merge**' and '**Merge with Another**' option available respectively under '**Merge Details**' tab.
-

- **Merge Details**

Electronic File

Electronic File option under the Files section helps the user to create an Electronic File.

- **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.
- **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 user has to perform the following steps:

Step 1: Open **Create New (Non-SFS)** by clicking on the option from the Left navigation panel under the **Electronic File** section, as a result, File Cover Page screen appears as shown in fig.eFile.31

The screenshot shows the 'File Cover Page' for the Government of India. The form is titled 'भारत सरकार GOVERNMENT OF INDIA' and includes the following fields and sections:

- File No.:** A field with a dropdown menu and a year selector (2013).
- Subject:** A text input field.
- Description:** A large text area for the file description.
- Category:** Two dropdown menus for 'Main' and 'Sub' categories.
- Other Details:** A section containing:
 - Classified:** A checkbox and a dropdown menu.
 - Remarks:** A text area for additional remarks.
 - Previous Reference:** A text input field.
 - Later Reference:** A text input field.
- Buttons:** 'Work On File Later' and 'Continue Working' buttons at the bottom.

Three callouts indicate the steps: Step 1 points to the 'File No.' field, Step 2 points to the 'Subject' field, and Step 3 points to the 'Continue Working' button.

Fig.eFile.31

Step 2: Enter the necessary details on the File Cover Page. **Subject Description** is a Mandatory field along with File No.

Step 3: After filling the necessary details, click the **Continue Working** () button to create a new file.

As a result, file gets created, along with a unique file number based on the selection of heads.

-
- User can also click the Work on File Later () button if want to work on File later on. And so the file moves to Draft section of Created File link. In this case the unique number of file is not generated.
-

There are **14 actions** provided on opening an **Electronic File**:

- a) **Noting - Add Note:** It facilitates the user to view the noting **By Name** and **By Date** or All the noting together. The user can add Green Note or a Yellow note after creating a file.

-
- Once the yellow note gets confirmed, noting gets finalized and saved to main Green sheet noting of File. At a time only one noting is active, either yellow note or Main Green sheet note.
-

- b) **Correspondence:** With the help of this feature user can attach correspondence/Receipt to the working File.

- c) **Draft:** With the help of this feature user can **Create New Draft** and **View existing Drafts** in the File.

- d) **Reference:** With the help of this feature user can attach references corresponding to the working File.

- e) **Link:** With the help of this feature user can Link and delink other eFile(s) to the working file.

It contains **2** sub links:

- **Internal Files:** This sub link helps the user to link/delink any other file from within the Organization
- **Linked In Files:** This sub link helps the user to view other Files that are linked from some other Organisation with the working file.

- f) **Details:** With the help of this feature user can view the total number of part files created.

- g) **Movements:** With the help of this feature user can have a track on the Running File and can view all the movements.

- h) **Edit:** With the help of this feature user can make changes to the cover page of existing running file except the Basic and corresponding Heads.

-
- Only the creator of the file has access to 'Edit' the Cover page of file. No other eOffice user has access to it.
-

- i) **Reply:** With the help of this link user can send a reply to the intended person.

- j) **Send:** With the help of this feature user can send the File to the Recipient.

- k) **Attachment:** This link facilitates the user to attach other files or receipts with the working File.

- l) **Merge:** This link allows the user to check the details whether the file has been previously merged with any other file (Physical files merged with other files and then converted to Electronic).


- m) **More:** With the help of this feature user can **Park** or **Close** the working file.

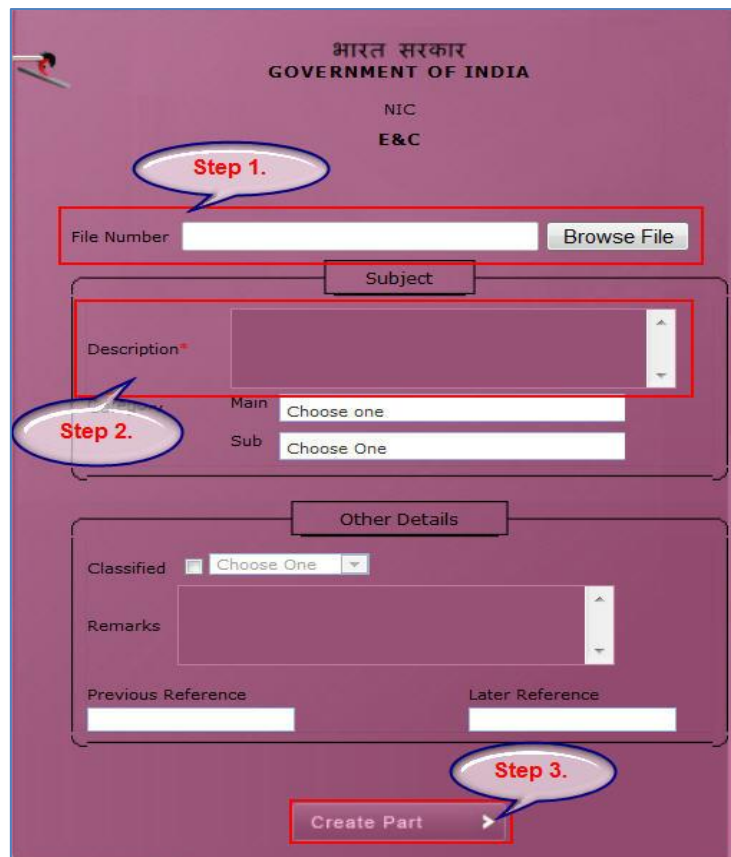
- **Close File:** Only creator of the File can close the file, no other person has access to close files.
- **Park File:** Parked File contains files that are temporary closed and work will be done later on.
- **Park File History:** Displays the history of the Parked file.
- **Close File History:** Displays the history of the closed file.
- **Merge Details:**

Create Part

The Create Part file option allows the user to create a part file against the file in submission i.e. not residing with the working user.

To create a part file the user has to perform the following steps:

1. Open **Create Part**  link by clicking on the option from the Left navigation panel under the **File** Section. Add File Number or upload the file, a part which is to be created as shown in Fig.eFile.32.



भारत सरकार
GOVERNMENT OF INDIA
NIC
E&C

Step 1.

File Number

Step 2.

Subject

Description*

Main

Sub

Other Details

Classified


Remarks

Previous Reference

Later Reference

Step 3.

Fig.eFile.32

2. Enter the necessary details on the File Cover Page. Subject Description is a Mandatory field along with File No.
3. Click on the **Create Part** () button to create a part file, as a result the part file gets created.

Create Volume

The Create Volume option allows the user to create a new volume of an existing file which is residing with him/her in the Draft or Inbox.

To create a Volume of a file the user has to perform the following steps:

Step 1: Open **Create Volume** by clicking on the option from the Left navigation panel under the File Section. Add File Number or upload the file, a part which is to be created as shown in Fig.eFile.33.

The screenshot shows a web form for creating a new volume of a file. The form is titled 'भारत सरकार GOVERNMENT OF INDIA' and 'NIC E&C'. It contains several sections: 'File Number' with a 'Browse File' button (Step 1), 'Subject', 'Description*' (Step 2), 'Main' and 'Sub' dropdowns, 'Other Details' with a 'Classified' dropdown, 'Remarks', 'Previous Reference', and 'Later Reference'. At the bottom is a 'Create Part' button (Step 3).

Fig.eFile.33


Step 2: Enter the necessary details on the File Cover Page. Subject Description **is a** Mandatory field along with File Number.

Step 3: Click on the **Create Volume** () Link (Fig.eFile.33) to create a Volume, as a result the new Volume of a file gets created.

Recycle Bin

Recycle Bin option contains list of all the Files which are deleted from the “**Created**” section of Files.

There are 2 links provided under Recycle Bin Section of File:


- a) **Delete** (

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Actions on Files

There are **7** actions provided in Files:




- a) **Receive:** This link helps the user to receive the Physical file only.
- b) **Reply:** This link helps the user to reply to the sender of the file.

- User can also Pull back the Sent File from the intended recipient even when the File is in the Inbox of the recipient, using the Pull Back () link. In case, the recipient has opened the File, then it is not possible to pull back the File.

- c) **Send:** This link helps the user to forward a particular File/s to the recipient.
- d) **View:** This link helps the user to list the Files depending upon its current state. i.e. (Unread, Read, Physical, Electronic, All)
 - **Unread** - Click the **Unread** from the dropdown menu to view **unread Files**.
 - **Read** - Click the **Read** from the dropdown menu to view **read Files**.
 - **Physical** - Click the **Physical** from the dropdown menu to view the **Physical** Files.
 - **Electronic** - Click the **Electronic** from the dropdown menu to view the **Electronic** Files.
 - **ALL** - Click the **ALL** from the dropdown menu to view the All receipts altogether.
- e) **Move To:** Helps the user to create New Folders and manage Existing Folders.
 - **My Folders** - Click the **My Folders** link from the dropdown menu to view the File inbox and its subfolders.
 - **Manage Folders** - Click the **Manage Folders** link from the dropdown menu to **Delete** or **Edit** folders created under File Inbox.
 - **Create New Folder** - Click the **Create New Folder** link from the dropdown menu to create a new folder under File inbox.
- f) **Reminder**
- g) **More**
 - Park File
 - Park File history
 - Close File
 - Close File History
 - Create Volume: This link helps the user to create a new Volume of an existing file. Volume file is created with the Volume number suffixed adjacent to the file number.

-
- Only creator of the File can close the file, no other person has access to close files.
-

Quick Actions: - There are some useful links given in inbox for Quick Actions such as:

- **Remarks** () - Shows latest Noting that has been done on that particular File.
- **Reply** () - It facilitates the user to reply to the sender of the File.
- **Forward** () - Forward a particular File to the recipient.

Migrate File

With the help of **Migrate File** user can migrate old files from local system to the eFile application.

Migrate File Link contains 3 sub links:

- Create New
- Created
- Folder Options

Let's learn about these links one by one:

Create New

This option helps the user to migrate a new file to the eFile application.

To migrate new File, user has to perform the following:

1. Open the **Create New** by clicking on the option under **Migrate File** link, as a result, Migrate File Cover page appears. Add the File No. or click the **Browse** button to import the file which needs to be migrated as shown in Fig.eFile.34.

भारत सरकार
GOVERNMENT OF INDIA
NIC
E&C

Step 1.

File No.* Choose Choose Choose Choose 2013 E&C

Physical File No.* Browse

Subject

Description.*

Category.* Main Choose One Sub Choose One

Step 2.

Other Details

Classified Choose One Opening date.* 17

Step 3.


Remarks

Previous Reference Later Reference

Step 4.

Work On File Later Continue Working

Fig.eFile.34

2. Fill all the mandatory fields on cover page such as **Description/Subject, Category (Main).**
3. Enter the **Opening Date.**
4. Click the **Continue Working** () to generate new file no.

Created

This option helps the user to save the file as drafts and can send later on whenever required.

Create option contains 2 sub modules:

- **Draft:** In Drafts File Number is not generated.
- **Completed:** In Completed module, **File number** is generated.

There are 5 links under **Completed** tab to perform operations:

- a) **Noting:** It is used to view the mapped noting of the migrated file.
- b) **Correspondence:** It is used to view the mapped Correspondence of the migrated file.
- c) **References:** It is used to view the mapped references in the migrated file.
- d) **Edit:** In this all the fields can be modified and saved.
- e) **Finalize Migration:** It requires Diarisation of all **Correspondence** and **Issues** being mapped into the application before finalizing the file.

Folder Permission

With the help of Folder Permissions, user gets the permission for section required for migration of files.

To provide permission to a user, perform the following:

Step 1: Click the **Folder Permissions** option under **Migrate File** link; as a result Permission page appears.

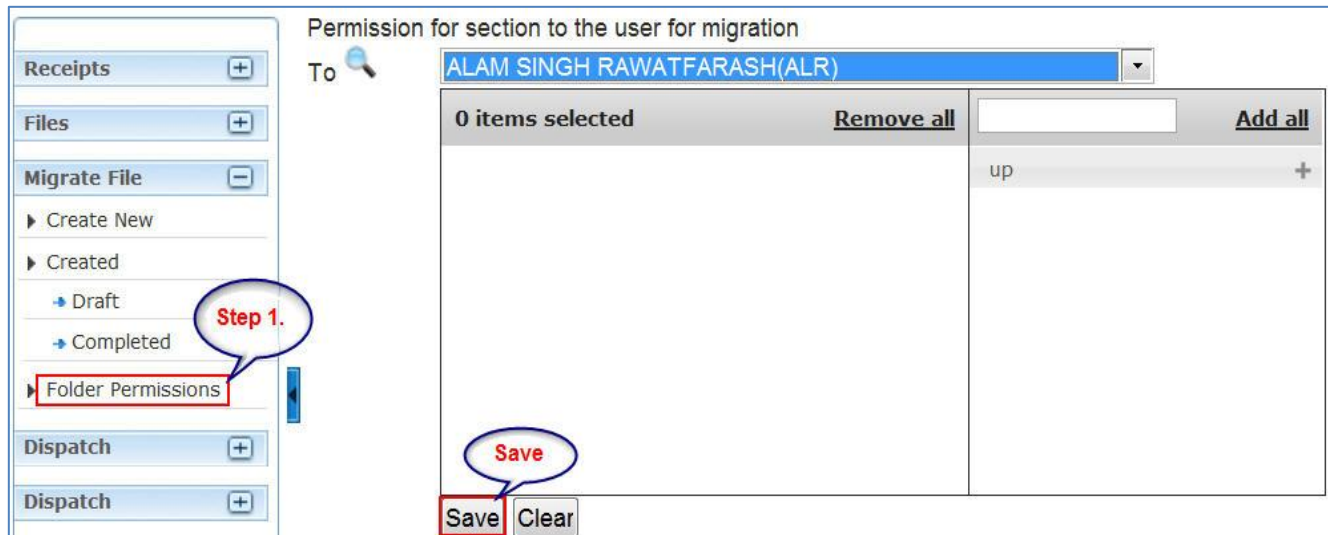


Fig.eFile.35

Step 2: Search the user to provide folder permission and click the **Save** (**Save**) button, as shown in the figure Fig.eFile.36:

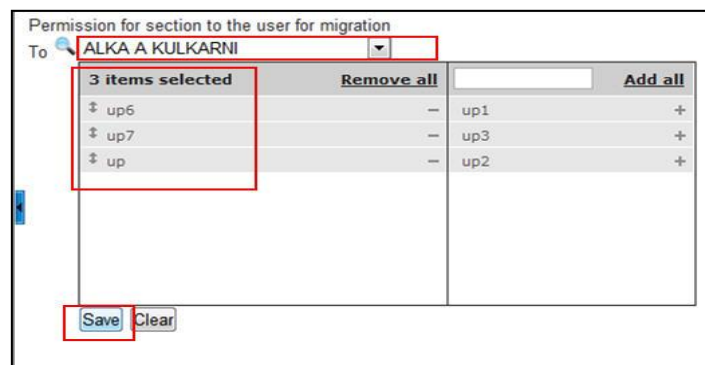


Fig.eFile.36

Dispatch

Dispatch section helps the user to view the issues that has been dispatched by them to the concerned recipient.

There are two links available under Dispatch Section which is mentioned below:

1. Sent

- Print Envelope
- Create Reminder
- View Reminder

2. Returned

- Receive
- Resend
- View Reminder

Let's learn these links one by one.

Sent: This module helps the CRU user to view the Sent Issues/Drafts.

-
- **Issued and Sent:** Refers to when the DFA has been sent by the CRU section but not dispatched finally by the CRU section
 - **Issued and Dispatched:** Refers to when the DFA that has been sent to CRU section has been finally dispatched.
 - **Issued and Returned:** Refers to when the sent DFA has been returned back to the CRU section.
 - Final Dispatch can be done only after receiving the Draft/Letter.
-

There are 3 actions provided under Sent section of Dispatch:

- a) **Print Envelope:** Helps the user to Print the envelope required for final Physical dispatch.

To print the Envelope, user has to perform the following:

1. Select the Sent Issue needs to be printed/dispatched physically and click the '**Print Envelope**' link, as shown in Fig.eFile.37:

Date Range : 11/08/2013 To 09/09/2013

Print Envelope Create Reminder View Reminders

<input type="checkbox"/>	Dispatch Number	Address	Sent On	Sent Through	File Number	Receipt Number	Parent Dispatch No	Status	Sanction Code
<input type="checkbox"/>	P 1/407/2013	Issue xcv, asdasd	05/09/13 10:49 AM	EOFFICE ADMINISTRATOR (Self)	C-15012/1/2013-JTSECY (DLT)-CMO			Issued & Dispatched	
<input checked="" type="checkbox"/>	E 1/398/2013	Issue fdgdfgdfgdf, fdgdfgdfgdf	04/09/13 02:24 PM	EOFFICE ADMINISTRATOR (Self)	B-13/6/2013-CM O			Issued & Dispatched	
<input type="checkbox"/>	E 1/397/2013	Issue sdd, dsds	04/09/13 02:23 PM	EOFFICE ADMINISTRATOR (Self)	B-13/6/2013-CM O			Issued & Dispatched	
<input type="checkbox"/>	E 1/396/2013	Issue xs, ss	04/09/13 02:19 PM	EOFFICE ADMINISTRATOR (Self)	BNS-1202/4/2013-CM O			Issued & Dispatched	
<input type="checkbox"/>	P 1/351/2013	Issue gPL P Receipt 1001, gPL P Receipt 1001, gPL P Recei...	02/09/13 01:50 PM	EOFFICE ADMINISTRATOR (Self)		154960/2013/JTSECY (DLT)-CMO		Issued & Dispatched	
<input type="checkbox"/>	E 1/330/2013	Issue Test Name, Test Address	30/08/13 11:02 AM	EOFFICE ADMINISTRATOR (Self)	GEN-1500897/1/2013-CM O	132177/2013/CMO		Issued & Dispatched	
<input type="checkbox"/>	E 1/246/2013	Issue 4yt54, ty45	22/08/13 07:46 PM	EOFFICE ADMINISTRATOR (Self)	G-11012/1/2013-CMO-CMO			Issued & Dispatched	
<input type="checkbox"/>	E 1/244/2013	Issue Sumit Agarwal, Mumbai	22/08/13 04:25 PM	EOFFICE ADMINISTRATOR (Self)	G-11012/1/2013-CMO-CMO			Issued & Dispatched	257

Fig.eFile.37

As a result new window appears asking for **Print Size**, as shown in Fig.eFile.38:

Fig.eFile.38

2. Select the **Print Size**, **Template** and click the '**Print**' () button (Fig.eFile.38), as a result the issue gets printed.

- Action Link () in **Quick Actions** facilitates the user to track the status of sent DFA.

b) **Create Reminder:** Helps the user to create the reminder on sent issues.

- The Issue/Draft details and other Communications details cannot be changed while creating a reminder for an issue.

To create Reminder on sent issues, user has to perform the following:

Step 1: Click on the **Sent** under **Dispatch** section.

Step 2: Select the issue for which reminder is to be created.

Step 3: Click the **Create Reminder** () link, as shown in Fig.eFile.39:

Dispatch Number	Address	Sent On	Sent Through	File Number	Receipt Number	Parent Dispatch No	Status	Sanction Code
E 1/459/2013	Reminder	17/09/13 02:40 PM	EOFFICE ADMINISTRATOR (Self)	BNS-13/4/2013-CMO(PRO)		1/458/2013	Issued & Dispatched	
E 1/458/2013	Issue	17/09/13 02:39 PM	EOFFICE ADMINISTRATOR (Self)	BNS-13/4/2013-CMO(PRO)			Issued & Dispatched	
P 1/455/2013	Issue	16/09/13 02:08 PM	EOFFICE ADMINISTRATOR (Self)	BNS/19/2013-CM O			Issued & Dispatched	

Fig.eFile.39

Step 4: As a result the Dispatch **Draft Details** page appears, as shown in Fig.eFile.40.Fill the required fields and click on **Set Reminder** button (Fig.eFile.40)

Fig.eFile.40

Step 5: As a result, **Reminder Setting** window appears, as shown in Fig.eFile.41. Enter the data in the mentioned fields and click on **Save** button.

Fig.eFile.41

As a result, a reminder is created for the selected issue.

- c) **View Reminder:** Helps the user to view the list of all reminders that were created on sent issues.

To view Reminder on sent issues, user has to perform the following:

Step 1: Click on the **Sent** under **Dispatch** section.

Step 2: Select the issue by clicking on the check box on which action needs to be performed.

Step 3: Click the **View Reminder** ([View Reminders](#)) link to view reminder Details as shown in Fig.eFile.42

Dispatch Number	Address	Sent On	Sent Through	File Number	Receipt Number	Parent Dispatch No	Status	Sanction Code
<input checked="" type="checkbox"/> E 1/459/2013	Reminder	Ajay Modi, Mumbai	17/09/13 02:40 PM	EOFFICE ADMINISTRATOR (Self)	BNS-13/4/2013-CMO(PRO)	1/458/2013	Issued & Dispatched	
<input type="checkbox"/> E 1/458/2013	Issue	Ajay Modi, Mumbai	17/09/13 02:39 PM	EOFFICE ADMINISTRATOR (Self)	BNS-13/4/2013-CMO(PRO)		Issued & Dispatched	
<input type="checkbox"/> P 1/455/2013	Issue	bnn, bnn	16/09/13 02:08 PM	EOFFICE ADMINISTRATOR (Self)	BNS/19/2013-CM O		Issued & Dispatched	
<input type="checkbox"/> P 1/407/2013	Issue	xcv, asdasd	05/09/13 10:49 AM	EOFFICE ADMINISTRATOR (Self)	C-15012/1/2013-JTSECY(DLT)-CMO		Issued & Dispatched	

Fig.eFile.42

As a result the **list of reminders** pertaining to the selected issue appears, as shown in Fig.eFile.43.

File No.	File Subject	Receipt No.	Receipt Subject	Dispatch No.	Dispatch Subject	Dispatched On	Reminder Dispatch No.	Reminder Dispatch Subject	Reminder Dispatched On
BNS-13/4/2013-CMO(PRO)	Security			1/458/2013	Modi	17/09/13 02:39 PM	1/459/2013	Modi	17/09/13 02:40 PM

Fig.eFile.43


- **Returned:** Contains the list of correspondence(s)/issues that are returned by the CRU/CRU section.

There are 3 actions provided under Returned section of Dispatch:

- a. **Receive:** Helps the user to receive the returned Issue/Correspondence only after which user can edit the received Document.
- b. **Resend:** Helps the user to resend the returned Issue/Correspondence after required changes (if required) to the CRU/CRU Section.
- c. **View Reminders**

Refer to **Sent** Section in **Dispatch** module

Quick Actions: - There is one useful link given under Dispatch as:

- ❖ **Action Detail** () - It facilitates the user to view the actions done at that moment on the Letter/Correspondence received.

DSC (Digital Signature Certificate)

It is a Digital Signature Certificate used for e-office that has the same legal recognition and validity as handwritten signatures which implies a process of demonstrating the authenticity of a digital message or document.

There is one link available under DSC section which is mentioned below:

DSC Registration

DSC Registration implies Digital Signature Certificate Registration. eOffice users obtain a Signing Certificate to go through DSC registration. DSC registration option facilitates the eOffice users for registration using an e-token issued to them by certificate issuing authorities like Tata Consultancy Services (TCS), National Informatics Centre (NIC), IDRBT Certifying Authority, SafeScript CA Services, Sify Communications, (n) Code

-
- eOffice USER ID and DSC LOGIN ID are different. Both are required to authenticate the LOG IN process, if the eOffice user has registered for DSC.
-

DSC registration can be done either using a DSC card or e-token. User can visit the website <http://nicca.nic.in>, for basic information of how to obtain the DSC certificate or e-token, how to obtain the software for DSC certificate or e-token, how to install them, and finally how to initialize the DSC certificate or e-token.

-
- User has to properly installed drivers for the DSC Smart card and USB Token in the system before using the DSC authentication or e-token authentication.
-

Fee structure for the different certificates and the hardware devices involved can be easily obtained by accessing, <http://nicca.nic.in>. Under this site, user can easily obtain the detailed information regarding the Certificate's Fee Structures, under the Support Link.

-
- Token involves only a single pen drive device.
-

After the user has properly enrolled for the DSC certificate or e-token, user has two level of authentication for accessing the eOffice application. User has to perform series of steps to log into the eOffice application, using e-Token or DSC card.

For e-Token Enrollment, perform the following steps:

1. Type the URL of the eOffice application in the address bar of the web browser.
2. Press **Enter** from the keyboard.
3. A window appears, displaying the **login page** for eOffice.
4. Type the **User id** in the User Name text box.
5. Type the **password** in the Password text box.
6. Click the **Login** button. As a result, the user gets successfully log into the eOffice application.
7. Plug-In the **e-token** in your machine/system.
8. Click the **DSC Registration** link under the DSC section. As a result, the **DSC Enrollment** Screen appears.
9. Click the **Signing Certificate** link in the DSC Enrollment Screen. As a result, the **DSC Enrollment** screen appears. Select the certificate for enrollment.
10. Click the **OK** button.
11. The Message box appears, displaying the message for successful enrollment of the eOffice user.
12. Click the **OK** button to complete the process of DSC enrollment.

For e-Token Authentication, perform the following:

1. Plug in the e-token device in your system.
2. Type the URL of the eOffice application in the address bar of the web browser.
3. Press **Enter** from the keyboard.
4. A window appears, displaying the login page for eOffice.
5. Type the **User id** in the User Name text box.
6. Type the **Password** in the Password text box.
7. Click the Login button, as a result, the Log On dialog box appears, prompting for password above the DSC Authentication screen.

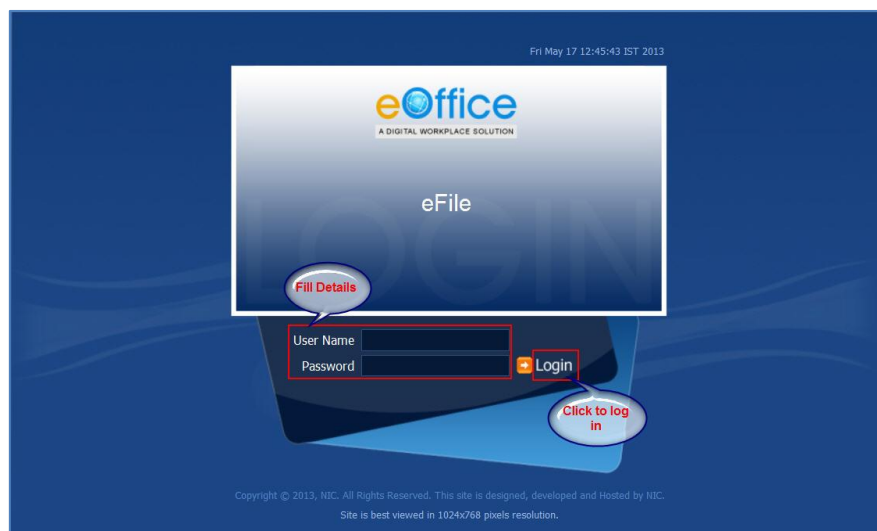


Fig.eFile.44

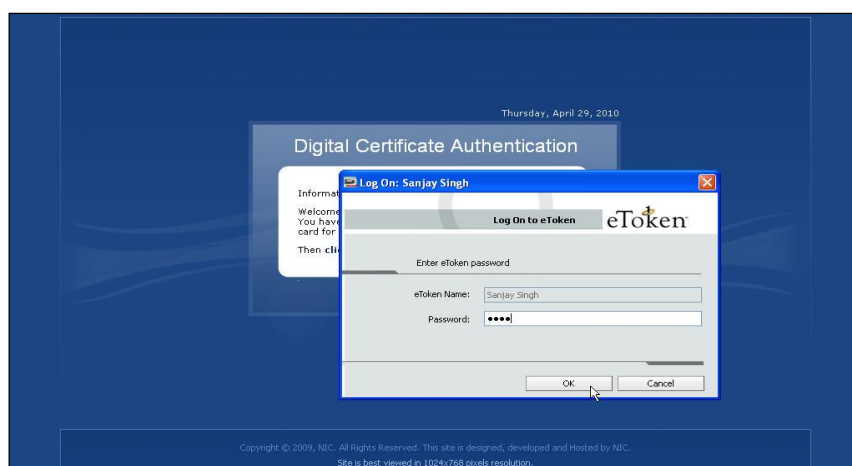


Fig.eFile.45

8. Type the **password** in the Password field in the Log On screen. (**Fig.eFile.45**)
 - User can enter the wrong password only 10 times. Thereafter if the wrong password is entered, the user gets blocked.
9. Click the **OK** button (**Fig.eFile.45**). As a result, the user gets log into the eOffice application.

For DSC Card Enrollment, perform the following:

1. Type the URL of the eOffice application in the address bar of the web browser.
2. Press **Enter** from the keyboard.
3. A window appears, displaying the login page for eOffice.
4. Type the **User id** in the User Name text box.
5. Type the **password** in the Password text box.
6. Click the **Login** button.
7. Plug-In the **e-token** in your machine/system, as a result, the user gets successfully log into the eOffice application.
8. Click the **DSC Registration** link under the **DSC** section. As a result, the **DSC Enrollment Screen** appears.
9. Click the **Signing Certificate** link in the **DSC Enrollment** Screen. As a result, **Enter Pin** dialog box appears.
10. Enter the pin in the Enter Pin text box in the **Enter PIN** dialog box.
11. Click the **OK** button, as a result, the **DSC Enrollment** screen appears.
12. Select the certificate for enrollment and click the **OK** button.
13. The message box appears, displaying the message for successful enrollment of the eOffice user. Click the **OK** button to complete the process of DSC enrollment

For DSC Card Authentication, perform the following:

1. Plug in the **DSC** card in your system.
2. Type the URL of the eOffice application in the address bar of the web browser.
3. Press **Enter** from the keyboard.
4. A window appears, displaying the login page for eOffice.
5. Type the **User id** in the User Name text box.
6. Type the **password** in the Password text box.
7. Click the **Login** button. As a result, the **Enter PIN** dialog box appears.
8. Type the password in the **Enter PIN** dialog box and click the **OK** button. As a result, the user gets logged into the **eOffice application**.

Reports

Reports are the documents that display the results of some search/experiment based on certain predefined parameters and filters such as Sent By, Time Period, Department etc.

It contains following 23 types of reports:

Reports under Files Section

- **Register:** Displays a list of files that are registered/ diarised.
- **Forwarded:** Displays a list of files that have been forwarded.
- **Received:** Displays a list of files that have been received.
- **Parked Files:** Displays a list of files that have been parked.
- **Closed Files:** Displays a list of files that have been closed.

Reports under Receipts Section

- **Diary:** Displays a list of receipts that have been diarised.
- **Received:** Displays a list of receipts that have been diarised.
- **Receipt Category:** Displays a list of receipts that have been received Category-wise.
- **VIP Details:** Displays a list of receipts based upon VIP Details.
- **Closed Receipts:** Displays a list of receipts that have been closed.

Departmental Summary

This selection generates a PDF report that contains a list of all the Receipts and Files that has been **Created, Received, Sent, Parked, Closed or Pending**.

My Files Pending With Others

Displays a list of pending files lying with other users.

Dispatch (Section-wise)

This selection generates a **PDF** report that contains a list of all the Letters which has been dispatched by the section between two specified dates.

Revenue Report

This selection generates a PDF report that contains a list of the revenue that has been spent in the section(s) for dispatch.

Receipts Forwarded by Section

This selection generates a **PDF** report that contains a list of all the Receipts that has been Forwarded by a section within a particular Time Duration.

Pendency Report (File/ Receipt)

This selection generates **PDF Report** of Files/Receipts which are in pendency.

Month Wise

Under this section the reports are generated based on Month-wise data.

Month-wise Files Received: Displays a list of files received in the particular month.

Month-wise Files Forwarded: Displays a list of files forwarded in the particular month.

Month-wise Receipts Created: Displays a list of receipts created in the particular month.

Month-wise Receipts Received: Displays a list of receipts received in the particular month.

Month-wise Receipts Forwarded: Displays a list of receipts forwarded in the particular month.

File Summary Report

This section displays a Summary report of all the actions performed on various **Files**, Department-wise (segregated by Sections of the selected Department) within a particular Time Duration.

Receipt Summary Report

This section displays a Summary report of all the actions performed on various **Receipts**, Department-wise (segregated by Sections of the selected Department) within a particular Time Duration.

File Pendency Report

This section displays a report on all the Pending/ Parked **Files**, Department-wise (segregated by Sections of the selected Department) within a particular Time Duration.

PUC Pendency Report

This section displays a report on all the Pending/ Parked **Receipts**, Department-wise (segregated by Sections of the selected Department) within a particular Time Duration.

Settings

This section helps the user to change the preferences/settings in eFile application.

The Setting section incorporates 4 modules:

- a) **Preferences**
- b) **Address Book**
- c) **User Groups**
- d) **Deactivate DSC**

Let's have an introduction about these modules one by one:

Preferences: This module facilitates the user to change the user requirement general preferences and customize as per requirement. Preferences module is partitioned among different sections like:

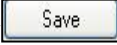
- i. **General Settings :** It helps the user to modify the General Settings like:
 - **Max # of records/page:** Refers to numbers of records that listed in a page
 - **Auto Save Duration:** Refers to set mode into Auto save while making any note in eFile Application.
 - **Flash Animations:** Refers to if users prefers Flash animation in eFile application or not.
- ii. **Alert Settings:** It helps the user to set alerts on Mobile, Email or both.
- iii. **List View Settings:** It helps the user to change the default view mode of Files/Receipts. User can set it to Electronic view, physical view or Default view which comprises of both.
- iv. **DSC Settings:** It helps the user to view the current status of DSC installed to his/her account (if any).
- v. **Customize your settings:** It helps the user to customize the DSC setting as per requirement. User can set it to Authentication mode, signing mode or both which comprises of Authentication and signing of DSC.

To change the settings, user has to perform the following steps:

1. Click the **Preferences** Link under **Settings** section, as a result, **Preferences** page appears.

The screenshot shows the 'Preferences' page in the eOffice application. The left sidebar contains a 'Settings' menu with 'Preferences' selected. The main area is divided into several sections: 'General Settings' (Max # of records/page, Auto Save Duration, Flash Animation), 'Alert Settings' (Email, SMS, Both, None), 'List View Settings' (Mode, Scope), 'DSC Settings' (Current Status), and 'Customise your Settings' (Authentication, Signing, Both). A 'Save' button is at the bottom left, and a 'Clear' button is at the bottom right. Annotations include 'Step 1' pointing to 'Preferences' in the sidebar, 'Step 2' pointing to the 'List View Settings' section, and 'Step 3' pointing to the 'Save' button.

Fig.eFile.46

2. User can change the **General Settings**, **Alert settings** or **List View Settings** as per requirement.
3. Click the **Save** () Button to save the altered changes.

Address Book: This module facilitates the user to create the group and add new contact/user into that group which helps the user while diarizing of a correspondence.

The screenshot shows the 'Address Book' page in the eOffice application. The left sidebar contains a 'Settings' menu with 'Address Book' selected. The main area is divided into three sections: 'Add New Group', 'Show All Contacts', and 'All Contacts'. The 'All Contacts' section displays a table with columns for 'Email-ID' and 'Group'. The table contains several entries, including '77 Singh', 'a', 'aa', 'AAA', 'aaa', and 'aaaa'. A 'Save' button is highlighted in the bottom right corner. Annotations include 'Step 1' pointing to 'Address Book' in the sidebar and 'Step 3' pointing to the 'Save' button.

Fig.eFile.47

User Groups: This module facilitates the user to create a group and add user list to that created group which 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 and add users to the group, user has to perform the following steps:

1. Click the **User Groups** Link under **Settings** section.

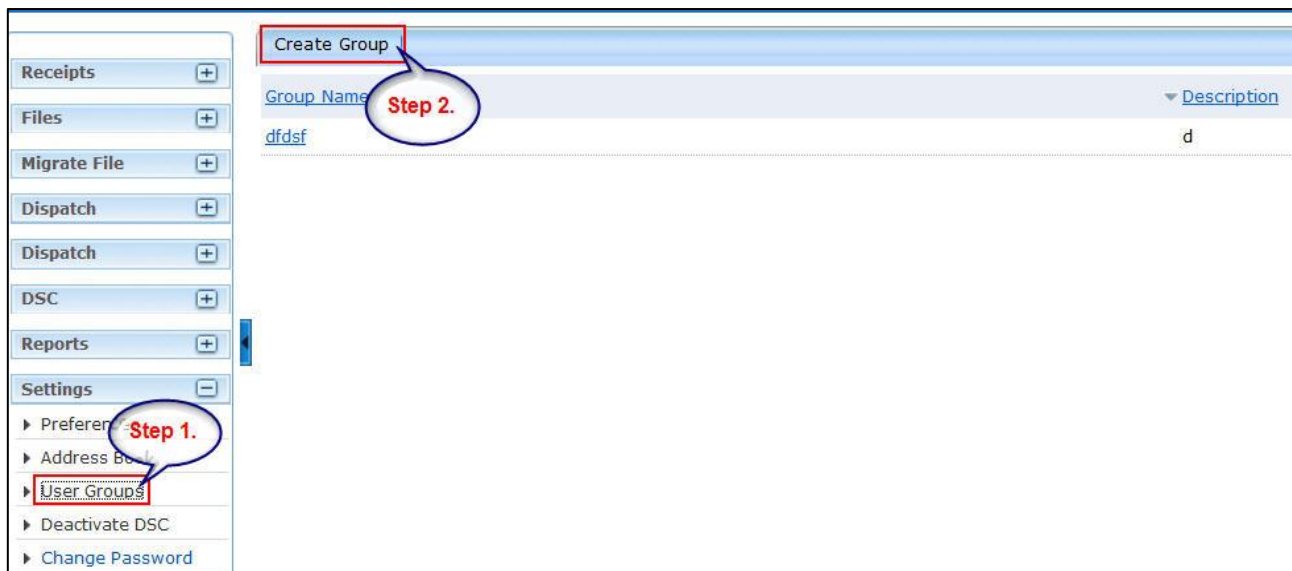


Fig.eFile.48

2. Click the **Create Group** button, as a result new window appears.
3. Enter the **Group name** and description (if any), click the **Create** button. As a result, a new group is created.

Now to add users to the created group:

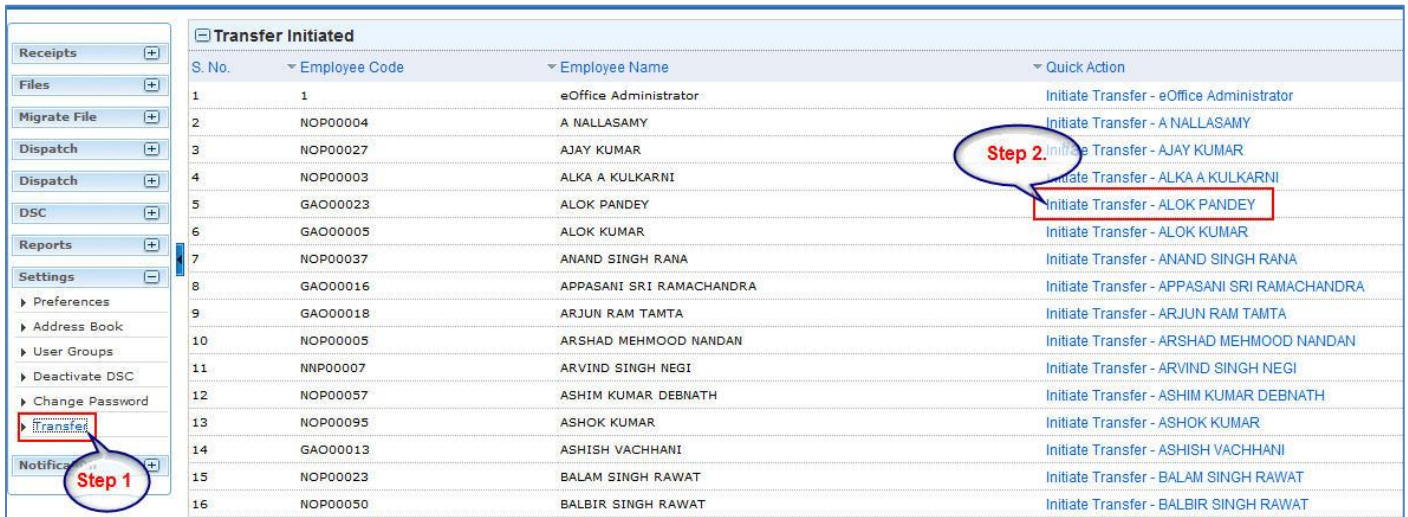
1. Click the Group in which user is required to be added up.
2. Select the users from the list which needs to be added up in the selected group and click the **Save** button. As a result, the user gets added up in the selected group.

Deactivate DSC: User can delete the DSC enrollment through Delete link and for Activation link Activate can be used.

Transfer: Only Admin has access to this module. In case, an employee is transferred, Admin can transfer his/her data (Files/ Receipts) from his/ her account to any other particular employee's account. Then onwards the transferred data will be worked upon and handled by that employee.

To Transfer the data, Admin has to perform the following steps:

1. Click the **Transfer** Link under **Settings** section, as shown in Fig.eFile.49.

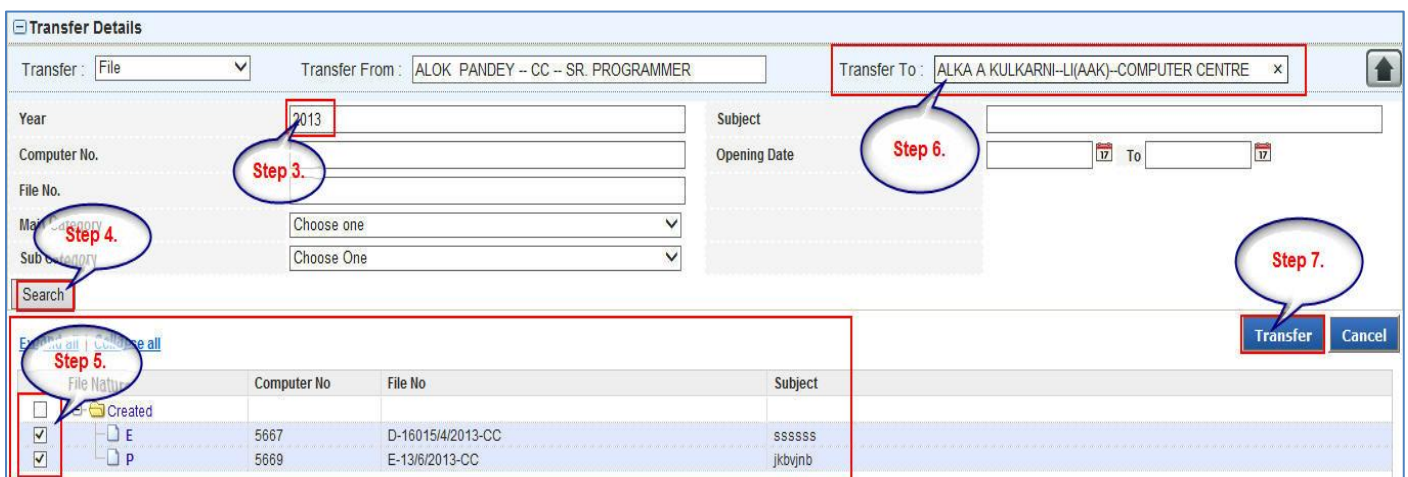


Transfer Initiated			
S. No.	Employee Code	Employee Name	Quick Action
1	1	eOffice Administrator	Initiate Transfer - eOffice Administrator
2	NOP00004	A NALLASAMY	Initiate Transfer - A NALLASAMY
3	NOP00027	AJAY KUMAR	Initiate Transfer - AJAY KUMAR
4	NOP00003	ALKA A KULKARNI	Initiate Transfer - ALKA A KULKARNI
5	GAO00023	ALOK PANDEY	Initiate Transfer - ALOK PANDEY
6	GAO00005	ALOK KUMAR	Initiate Transfer - ALOK KUMAR
7	NOP00037	ANAND SINGH RANA	Initiate Transfer - ANAND SINGH RANA
8	GAO00016	APPASANI SRI RAMACHANDRA	Initiate Transfer - APPASANI SRI RAMACHANDRA
9	GAO00018	ARJUN RAM TAMTA	Initiate Transfer - ARJUN RAM TAMTA
10	NOP00005	ARSHAD MEHMOOD NANDAN	Initiate Transfer - ARSHAD MEHMOOD NANDAN
11	NNP00007	ARVIND SINGH NEGI	Initiate Transfer - ARVIND SINGH NEGI
12	NOP00057	ASHIM KUMAR DEBNATH	Initiate Transfer - ASHIM KUMAR DEBNATH
13	NOP00095	ASHOK KUMAR	Initiate Transfer - ASHOK KUMAR
14	GAO00013	ASHISH VACHHANI	Initiate Transfer - ASHISH VACHHANI
15	NOP00023	BALAM SINGH RAWAT	Initiate Transfer - BALAM SINGH RAWAT
16	NOP00050	BALBIR SINGH RAWAT	Initiate Transfer - BALBIR SINGH RAWAT

Fig.eFile.49

2. Click the **Initiate Transfer** link against the Employee Name, whose transfer has been initiated and his data is to be transferred.

As a result **Transfer Details** page appears, as shown in Fig.eFile.50:



Transfer Details

Transfer: File Transfer From: ALOK PANDEY -- CC -- SR. PROGRAMMER Transfer To: ALKA A KULKARNI-L(AAK)-COMPUTER CENTRE

Year: 2013 Subject: Opening Date: To:

Computer No.

File No.

Main Category: Choose one

Sub Category: Choose One

Search


Step 5: File Nature: ☒ E ☒ P

File Nature	Computer No	File No	Subject
E	5667	D-16015/4/2013-CC	ssssss
P	5669	E-13/6/2013-CC	jkbvjnb

Step 7: Transfer Cancel

Fig.eFile.50

3. Enter details to filter search for the Data (Files/ Receipts) under selected employee, to be transferred to another employee.
4. Click on **Submit** button.

5. Select the data to be transferred by clicking on the check boxes pertaining to the files/ receipts.
6. Enter the employees name in **Transfer To**, to whom the data is to be transferred.
7. Click on **Transfer**  button.

Search

Search section helps the user to search the File(s)/Receipt(s) or any Dispatched issue from within the section/ Organisation/ application.

There are basically 2 different types of search that user can perform:

- Module search
- Advanced Search

Let's learn about these types one by one:

Module Search

This type of search allows the user to search the **Receipt/File/Dispatch** from within the application module only.


For example – To find any receipt lying under **Receipt inbox**, user first has to select **Receipt Inbox module** and then can search for that particular receipt. If in case user has selected Receipt inbox module and searching any File or any receipt which is not in receipt inbox, then **Module Search** won't allow the user to give the required result.

For module search process, perform the following:

Step 1: Select the application module from which the user want to search, as shown in Fig.eFile.51:



Fig.eFile.51

Step 2: Type the receipt number in **Module search field** which user want to search, as we have chosen **Receipt Inbox** module, and click the **Search** () button.

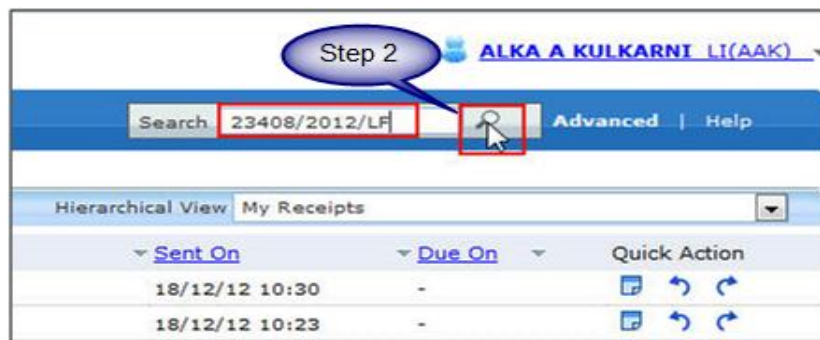


Fig.eFile.52

As a result, Search result appears.

- If the searched receipt/File is not received electronically, then user first need to receive it or else user can open the Receipt/File from there itself and can perform any action on it.

Advance Search

This type of search allows the user to search the Receipt/File/Dispatch from within the application, Section wise or globally (within Organisation).

Advance Search module is divided into 3 types of search:

- a) Section wise search:
- b) Global Search:

Let's Learn about these submodules one by one:

- a) Section wise search:** This search helps the user to find any receipt/file/dispatch from within the section to which the user lies in. User don't have access to the receipts and files that lie under other sections.
- b) Global Search:** This search helps the user to find any receipt/file/dispatch that lies within the Organisation i.e. the scope of search is global.

Search - Actions

It helps the user to perform various actions on Receipt(s)/ File(s)/ Dispatch. This can be accessed by right clicking the Search Results.

Following actions can be performed on Search Results:

On Receipts

Receipts Inbox and Created

- **Details:** Helps the user to view the metadata details and the movements of that receipt.
- **Send:** Helps the user to forward the receipt to other eOffice user.
- **Put in a File:** Helps the user to attach the receipt to a concerned file
- **Dispatch:** Helps the user to dispatch the Letter.

Receipts Sent

- **Details:** Helps the user to view the metadata details and the movements of that receipt.

Receipts with other user

- **Details:** Helps the user to view the metadata details and the movements of that Receipt.
- **Pull Up:** Helps the user to force receive the Receipt from other e-Office user.

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- No action can be performed on Receipts which are attached with a File.
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Actions on Closed Receipts

- **Reopen:** This action helps the user to reopen the closed receipts.

On Files

File Inbox and Created

- **Details:** Helps the user to view the metadata details and the movements of that File.
- **Send:** Helps the user to forward the File to other eOffice user.

File with other user

- **Details:** Helps the user to view the metadata details and the movements of that File.
- **Pull Up:** Helps the user to force receive the File from other eOffice user.

Actions on Parked Files

- **Details:** This action helps the user to view the details of the parked file.
- **Make Active:** This action helps the user to make the parked file active.

Actions on Closed Files

- **Reopen:** This action helps the user to reopen the closed file.

File Closed

- **Reopen:** Helps the user to make the File active.

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- No action can be performed on Files which are attached with a Receipt.
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On Issued Dispatch

Issued & Dispatched: This includes dispatch done by the user finally.

- **Details:** Helps the user to view the details of the issued dispatch.
- **View Reminders:** Helps the user to view the reminder list of that selected dispatched issue.

Issued & Sent: This includes dispatch done by the user to the CRU.

- **Details:** Helps the user to view the details of the issued dispatch to the CRU.

Issued & Returned: This includes dispatch returned by CRU to the user.

- **Details:** Helps the user to view the details of the issued dispatch to the CRU.
- **Receive:** User need to accept the issue returned by CRU.
- **Resend:** User can resend the dispatch after receiving the issue.

Dispatch by other users

- **Details:** Helps the user to view the metadata details of the issued dispatch.

Actions on Notification

- **Self Reminder:** It contains all the reminders/notification that has been set by the user for themselves or for other eOffice users.
- **Reminder Received:** It contains all the reminders/notification that has been set by other eOffice users. User can further mark the received reminder as '**Mark as Read**' or even can '**Delete**' the reminder.

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