सत्यमेव जयते

eOffice

A DIGITAL WORK PLACE SOLUTION

eFile

File Management System

User Manual

NIC-EOF-EFILE-UM-002

Prepared by
National Informatics Centre

Table of Contents

Receipt

Once a DAK/Letter is Diarised and a unique receipt/diary number is allotted then it becomes **Receipt**.

Diarisation of DAK/Letter

Browse and Diarise sub module of Receipt is used to generate **Receipt**, which can be either physical or electronic in nature.

- **Physical:** The unique number for the DAK/Letter 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/Letter is generated by the system, and further processing of the receipt is always electronic in nature.

Important Points:

- ✓ Uploading of scanned document of 'DAK/Letter' is mandatory for **Electronic** diarisation and optional for **Physical** diarisation.
- ✓ DAK/Letter must be scanned as a single PDF (preferably a searchable PDF).For scanning the DAK/ letter refer to Annexure-I (Guidelines for Scanning).

Steps to Follow:

1. Click **Physical/Electronic** link under **Browse & Diarize** sub-module or Click **Physical/Electronic** under **Create** link in Quick Access Menu bar for Receipt *(Figure 1)*.

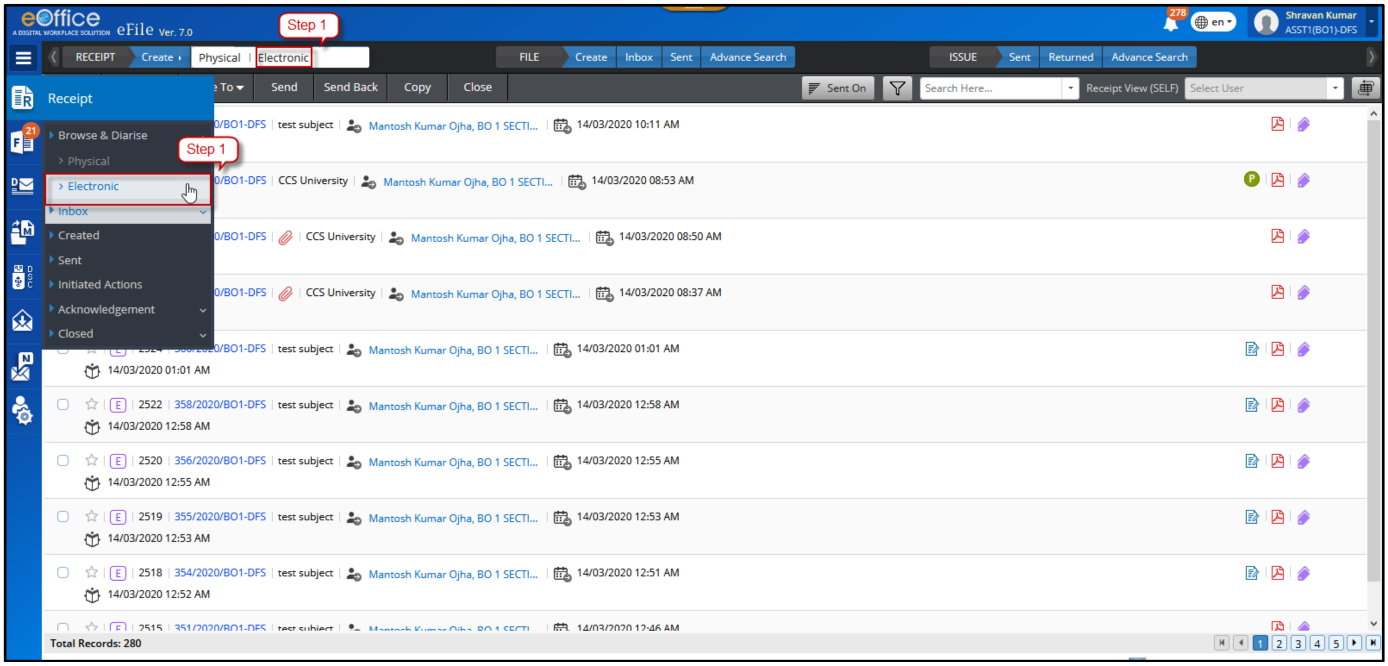


Figure 1

2. Click **Upload** button. The File Upload dialog box appears. Select the desired scanned PDF document (**up to 20 MB**) and click **Open**button (*Figure 2*).

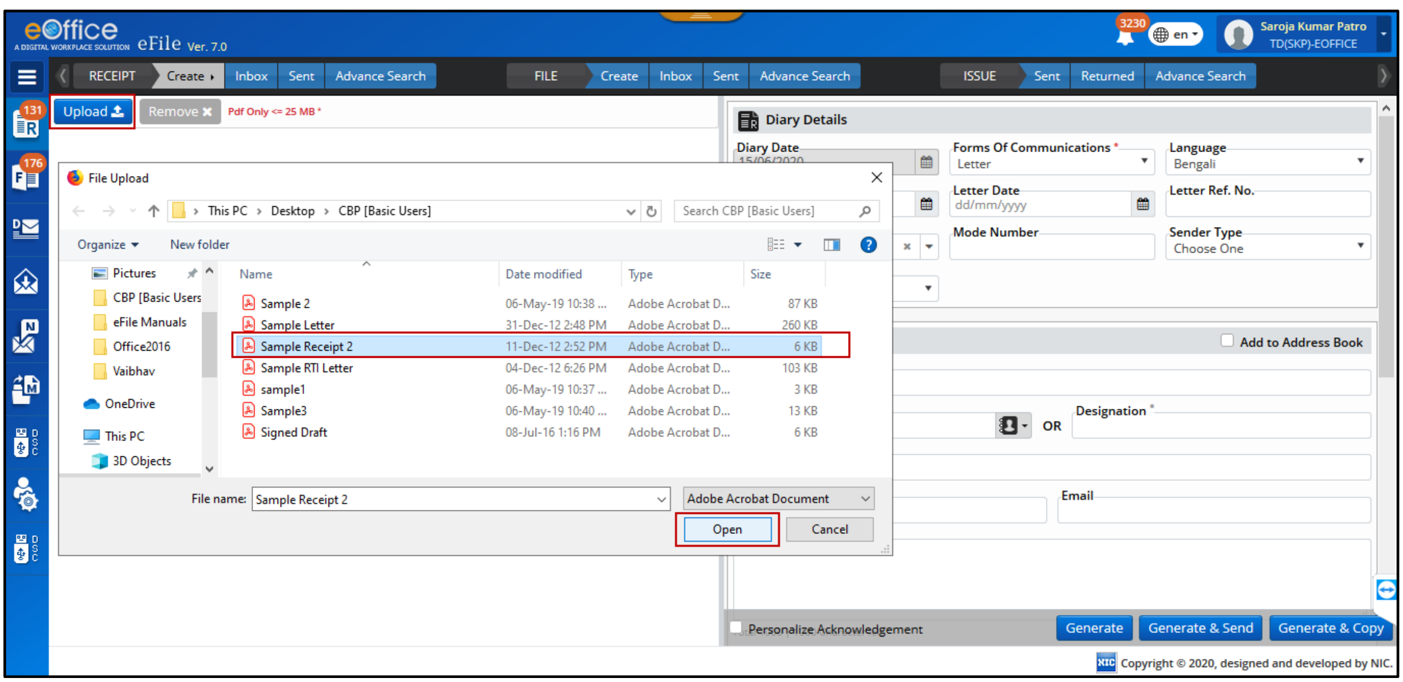


Figure 2

3. Once the scanned DAK/Letter is uploaded, enter the required metadata (**Diary Details**, **Contact Details** and **Subject Category**):

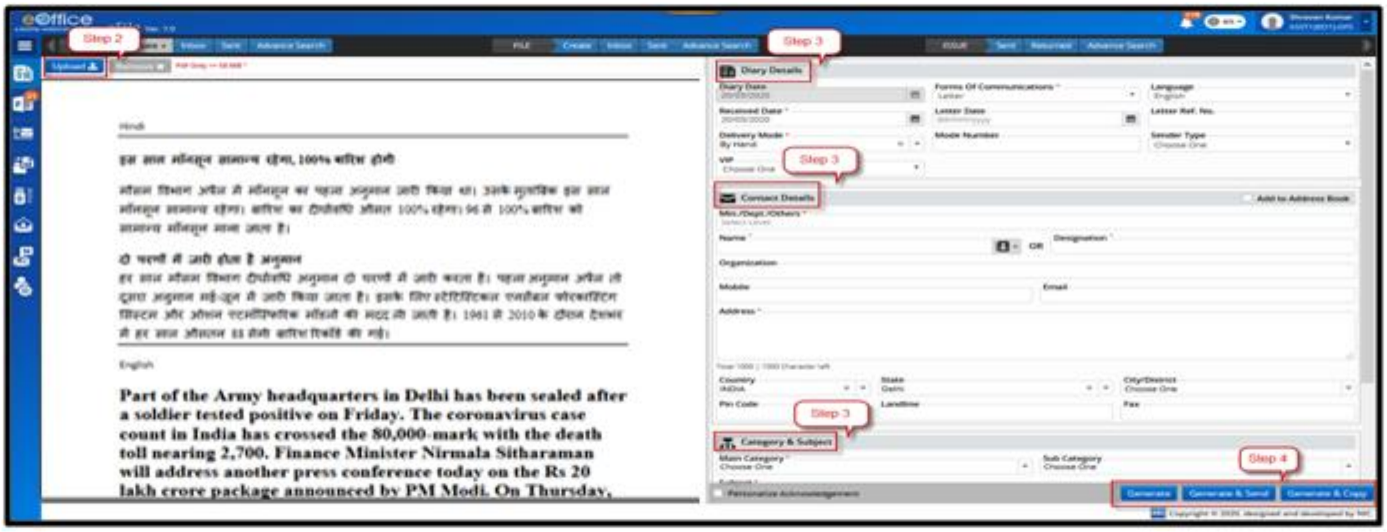


Figure 3

4. Click **Generate** or **Generate & Copy** or **Generate & Send** to generate new electronic receipt with a unique **Receipt No.** (*Figure 4*).

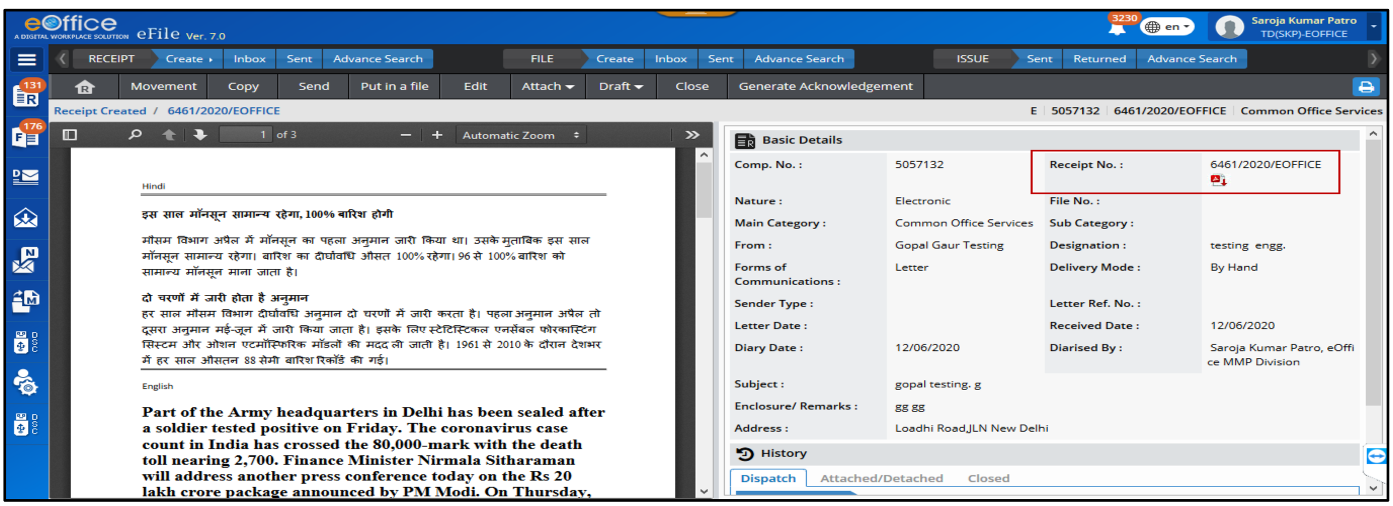


Figure 4

Note:

- All the mandatory fields are marked with Red asterisk (*).
- User can choose one of the fields marked with Orange asterisk (*).
- **Personalize Acknowledgment**: There is a provision to send acknowledgement to the sender who's DAK/ letter has been received in the organization (Refer Acknowledgment sub-module).
- **Generate:** Creates the receipt and saves it in **'Created'** sub module.
- **Generate & Send:** Generates the Receipt No. and redirects to Receipt **Send** screen.
- **Generate & Copy:** (***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.

Created Receipt List

The **Created** sub module displays the list of all generated Receipts (both **Electronic** and **Physical** in nature) that are not yet Marked/Send.

To view list of receipts created, Click **Created** sub module of **Receipt** module as shown in ***Figure* 5**.

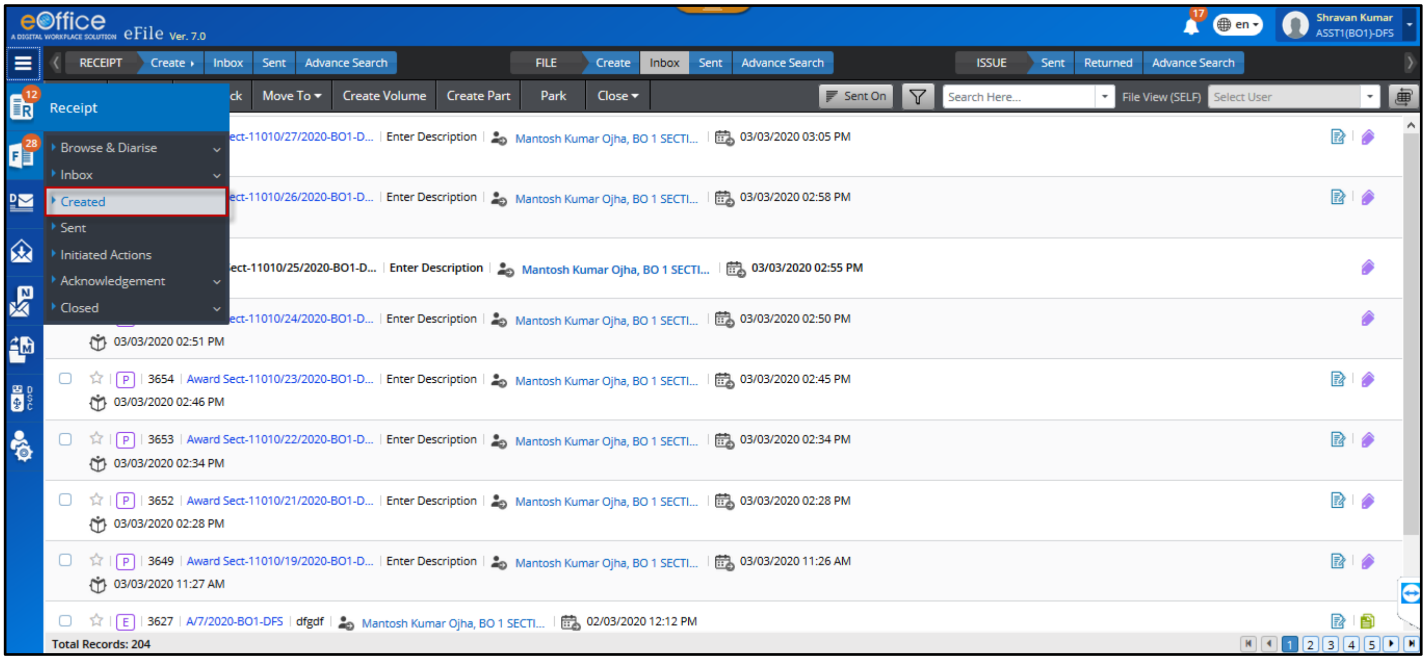


Figure 5

Description:

- The **Created** list of receipts displays information such as, **Nature of Receipt (E/P), Computer No., Receipt No., Subject, Subject Category, Created On and Enclosure/Remarks** (*Figure 6*).

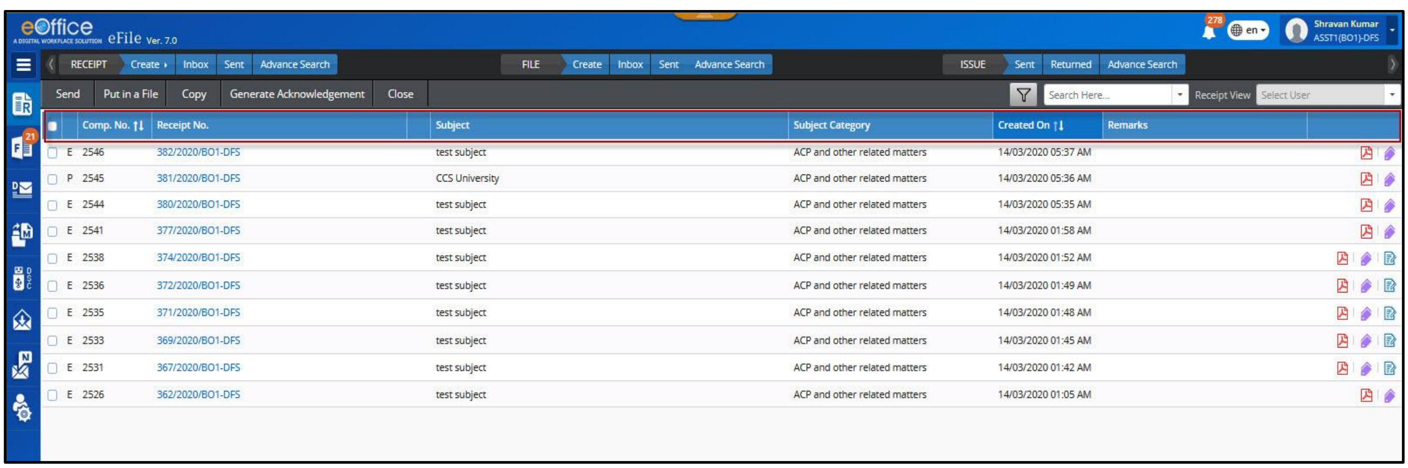


Figure 6

- The list of receipts can be sorted on the basis of **Computer No.** and **Created On** by clicking on column heads.

- The list of receipts can be filtered on the basis of **Nature**, **Subject Category**, **Reference (VIP)** and **Creation Date** range by clicking Filter Icon in menu bar.

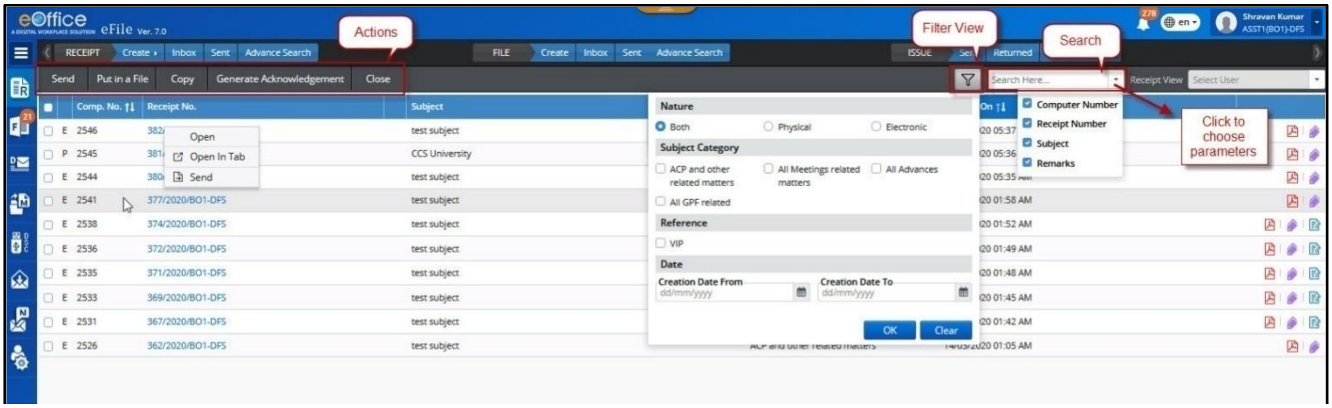


Figure 7

- The receipts can be searched using **Module Search** on the basis of **Computer No.**, **Receipt No.**, **Subject** and **Remarks**, by entering at least 3 characters.
- In addition to above, the **Created Receipt list** of **Self**, **Section User(s)** and **User under individual post hierarchy** can be viewed through **Receipt View**. (*Figure 8*)

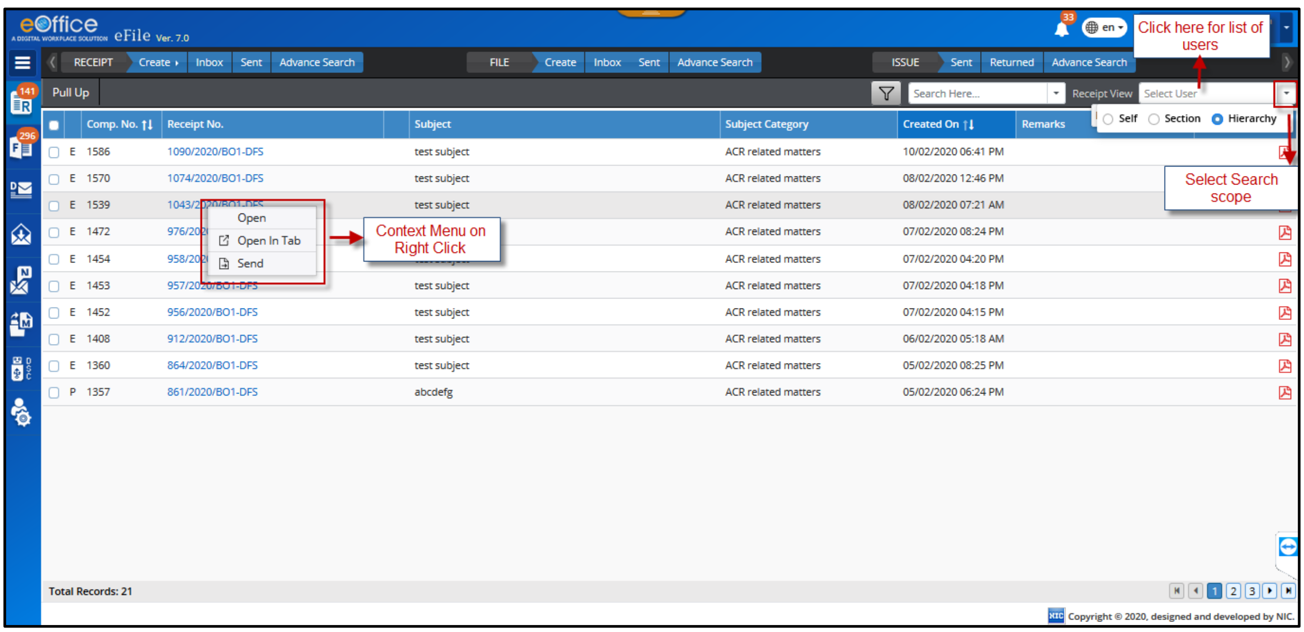


Figure 8

Note:

- Receipt View will display list of created receipts in **Section** and **Hierarchy** and no action will be allowed on them except **'Pull up'**
- Receipt is to be pulled up, to view its inner page and take other actions.

- Also, using context menu (mouse right click on receipt no.) created receipts can be opened in same or Different Tab of browser and also, can be send further.*(Figure 8)*
- The Attachment Icon next to Receipt no. is visible in case some other Files and/or Receipts are attached with it and further can be clicked to see attached details.
- The following actions that can be performed on the list of Created receipts:

  - Send
  - Put in a File
  - Copy
  - Generate Acknowledgement
  - Close

- Details of receipt such as diarized letter and other information can be viewed on receipt inner page by clicking on the **Receipt No**.
- Some additional actions that can be taken from receipt inner page are as follows –
  - Edit
  - Attach
  - Draft (For Electronic Receipt only)
  - Dispatch (For Physical Receipt only)
  - Convert (For Physical Receipt only)
  - Print

Receipt Inbox

The Receipt **Inbox** sub module displays list of all the incoming receipts that have been marked to the logged in user for further necessary action. The receipts in Inbox are in active state pending for necessary disposal.

To view list of receipts received, Click **Inbox** sub module of **Receipt** module or Click **Inbox** link of Receipt Quick Access menu bar. ***(Figure 9):***

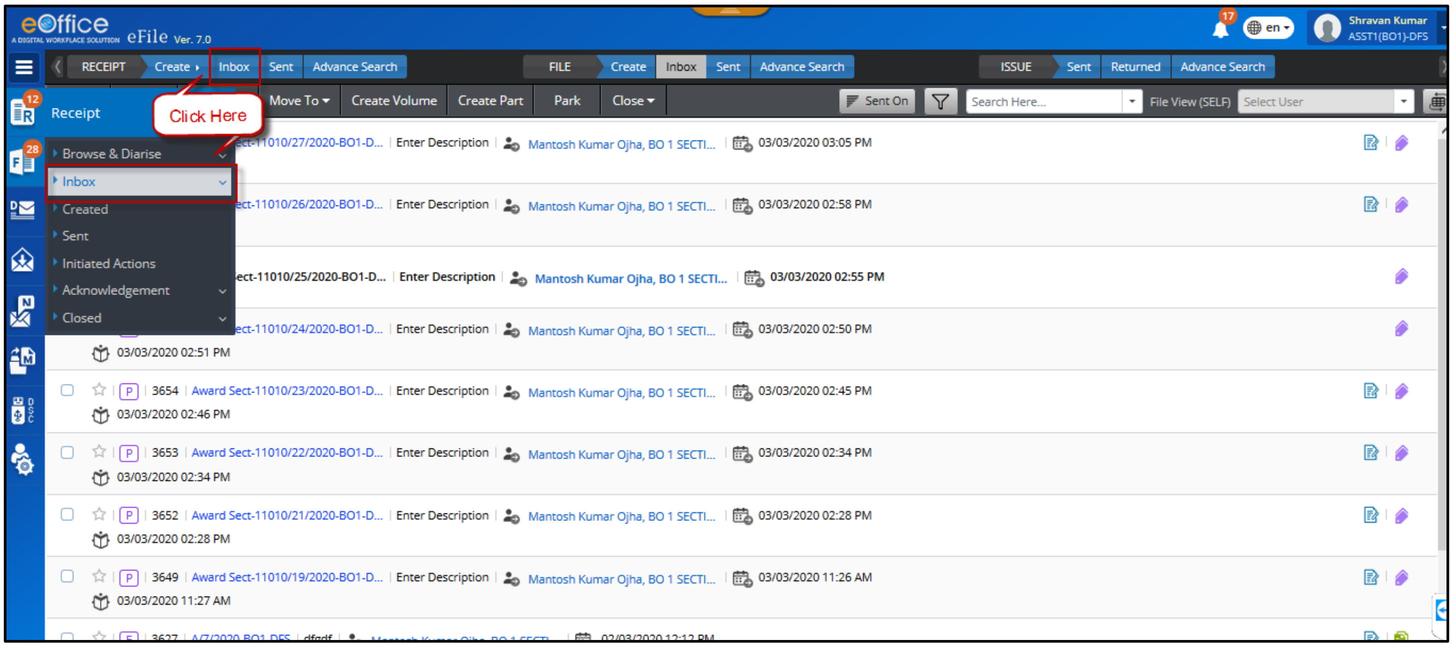


Figure 9

Description:

- The Inbox View can be switched from Advanced (Row based) to Normal (Column Based) and vice versa by clicking on switch icon. (*Figure 10*)

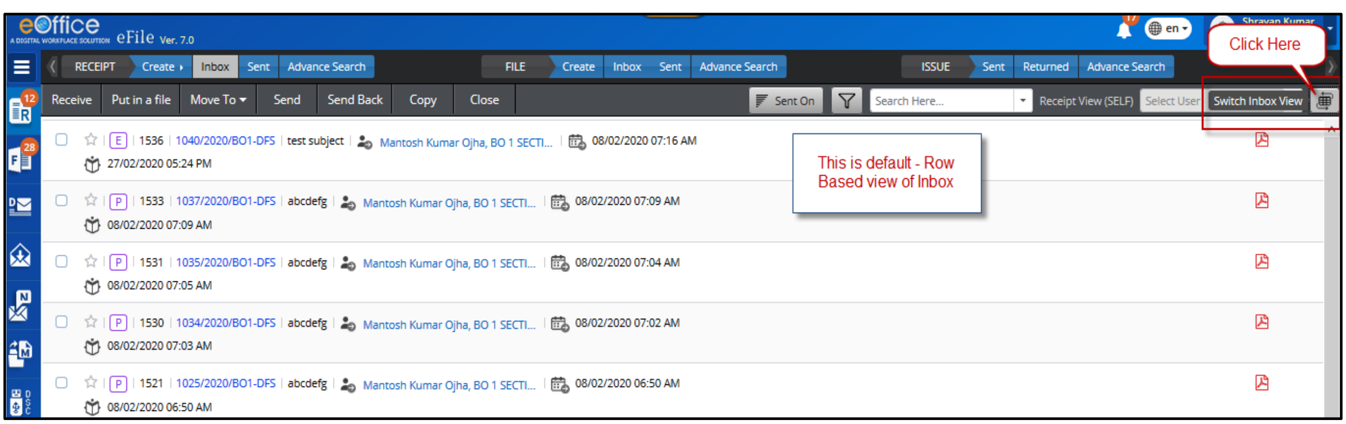


Figure 10

Note:

- To configure the default view for Inbox List Refer Preferences sub module of Setting Module.

- The **Inbox** list of receipts displays information such as, **Nature of Receipt** (E/P), **Computer No.**, **Receipt No.**, **Subject**, **Sent By**, **Sent on**, **Read On**, **Due On** and **Remarks** *(Figure 11)*.

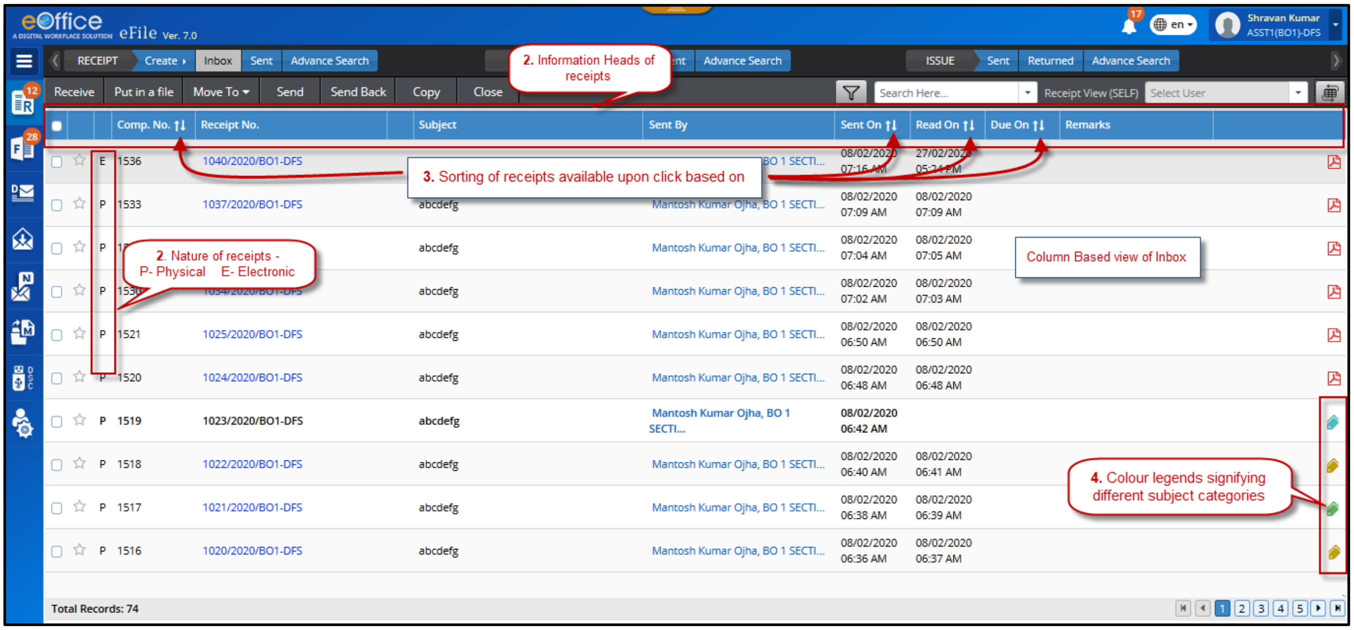


Figure 11

- List of Receipts can be sorted based on **Computer No., Sent On, Due On** and **Read On**.
- **Legends** and **Color Code** are used to differentiate various receipts in list.*(Figure 11)*
- **Sent By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.*(Figure 12)*

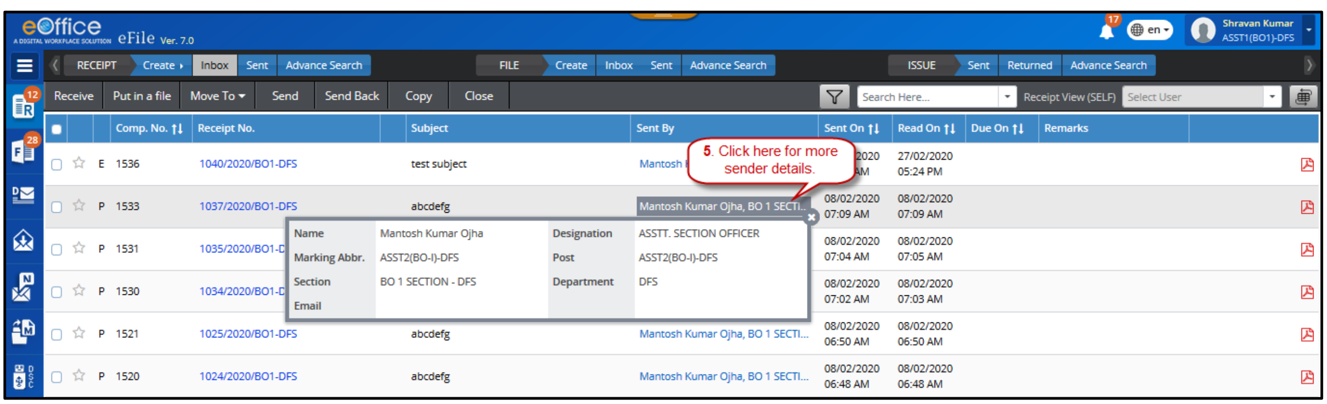


Figure 12

- The list of Receipts in the Inbox can be **filtered** by clicking on the Filter Icon in the menu bar on the basis of **Nature, Read/Unread, Priority, Subject Category, Reference (VIP), Sent Date** range, **Due Date** range and other Flags/Label such as Important, Due Date Elapsed and Action Initiated.***(Figure 13)***

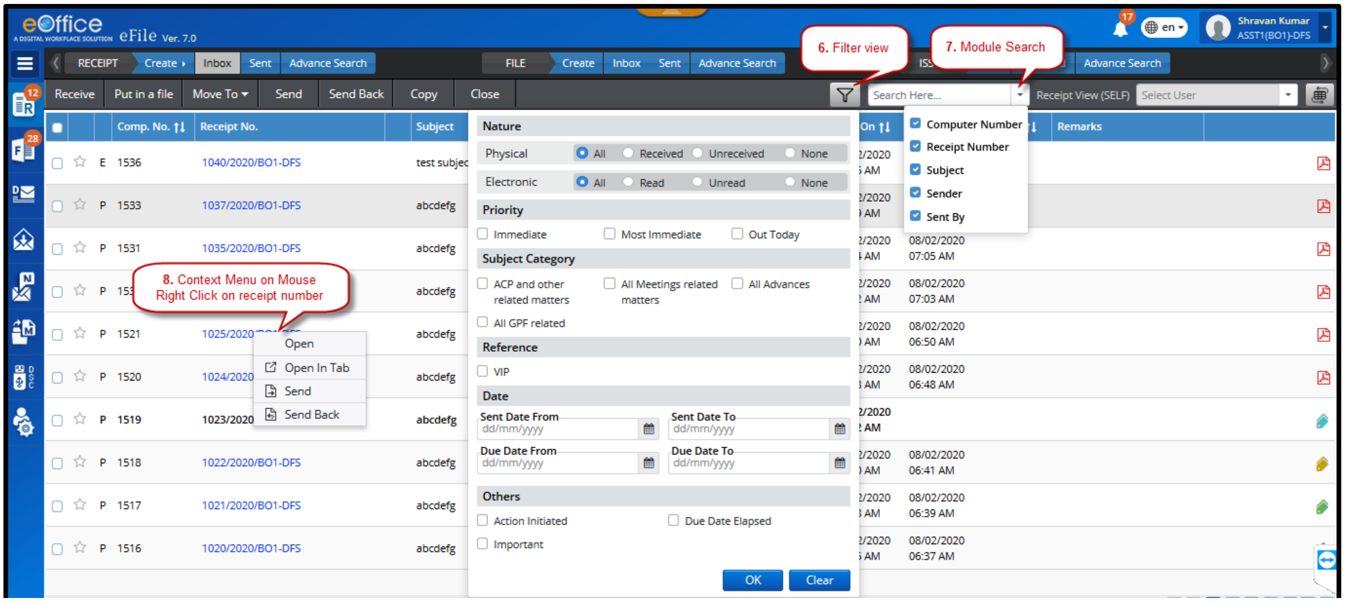


Figure 13

- Receipt can be searched using **Module Search** (Computer No., Receipt No., Subject, Sender and Sent By).***(Figure 13)***
- Using **Context menu** (on mouse right click) **receipts** in Inbox can be Received (Unreceived physical receipts only), **Opened in Same** or **Different Tab** of the browser and can be **Send** or **Send Back**.***(Figure 13)***
- List of receipts in Inbox of Self, Users in same Section/Office and Users under your individual post hierarchy can be viewed through Receipt view. ***(Figure 14)***

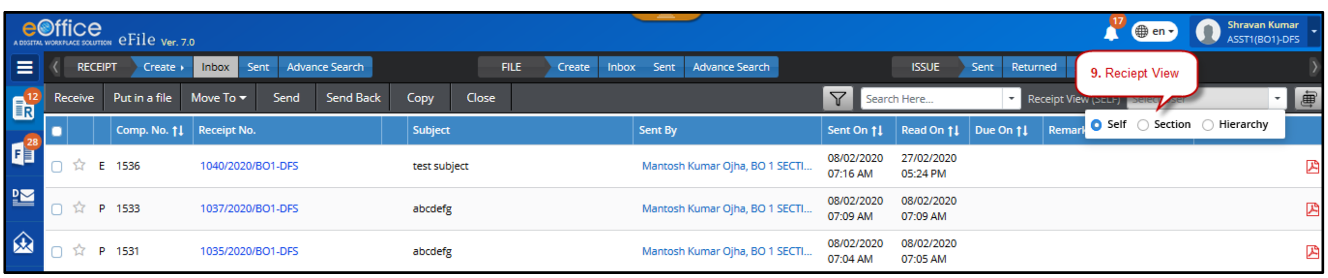


Figure 14

Note:

- Receipt View will display Inbox list of users in **Section** and **Hierarchy**, no action will be allowed on them except **'Pull up'**
- Receipt is to be pulled up, to view its inner page and take other actions.

- The Attachment Icon next to Receipt no. is visible in case File(s)/Receipt(s) are attached with it and further can be clicked to see attached details.***(Figure 15)***

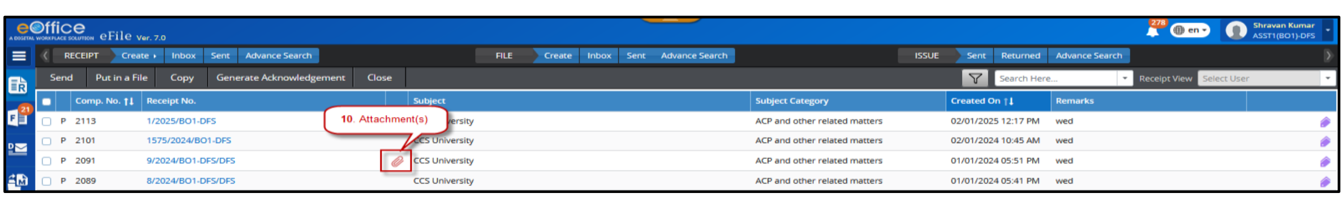


Figure 15

- Details of receipt such as diarized letter and other information can be viewed on receipt inner page by clicking on the **Receipt No**.
- The un-received Physical receipt need to be received in order to take action on it (***Figure 16***).

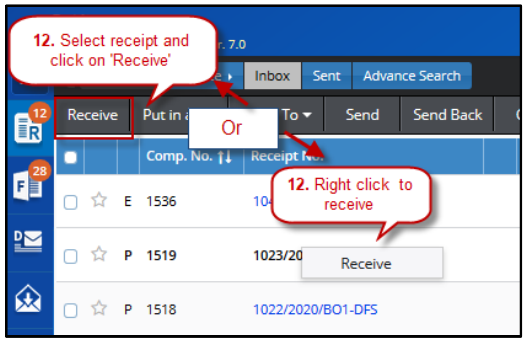


Figure 16

- The following actions that can be performed on the list of INBOX receipts –

  1. Receive (Applicable for un-received physical files only)
  2. Put in a File
  3. Move To (My Folders)
  4. Send
  5. Send Back
  6. Copy
  7. Close

Sub-Folders under Inbox

The receipts in an Inbox can be organized by creating sub-folders under Inbox Sub module and moving these receipts into the created sub-folders. These sub-folders can be named by the user on the basis of the subject categories or various others level categorization as suitable.

Create Sub-Folders

This section describes the steps to create sub-folders under receipt Inbox.

STEPS TO FOLLOW:

1. Select Receipts from **Inbox**, to move to the new folder:

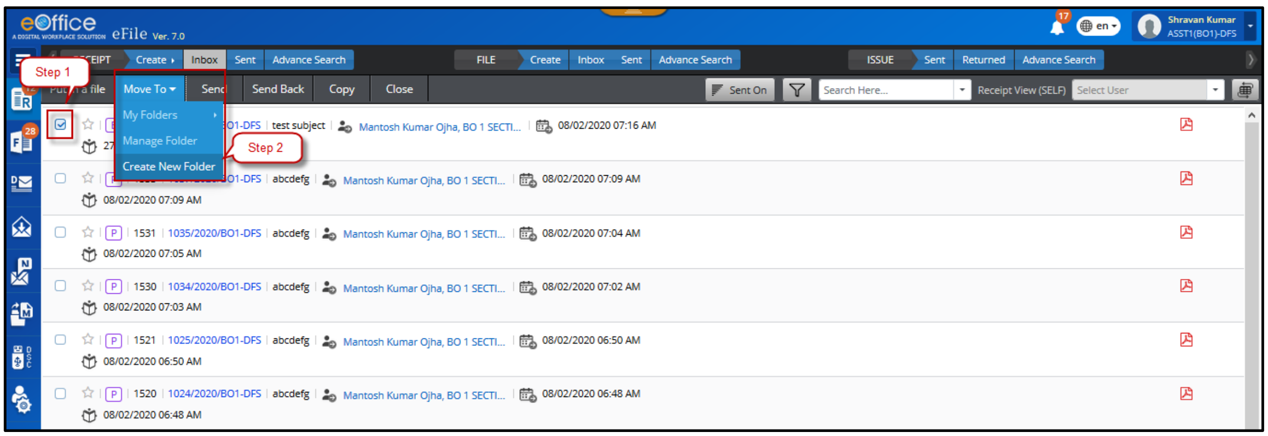


Figure 17

2. Click **Move To→Create New Folder**.
3. Enter **Folder Name** in the Create Folder Popup.

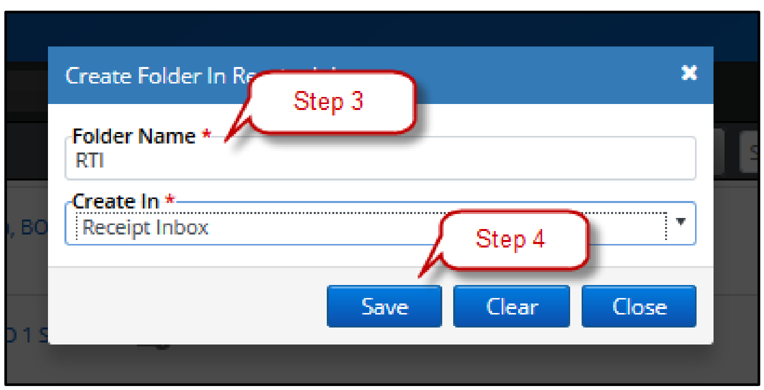


Figure 18

4. Click **Save** button to create new folder and move the selected receipt into it.

Note:

- It is required to select the receipt beforehand from the receipt Inbox to create a new folder.
- Selected Receipts will move to Inbox Sub Folder.

Moving Receipt between the Folders

This section describes the process of moving receipts between the folders under receipts INBOX.

STEPS TO FOLLOW:

1. Select Receipts from the **Inbox** or the **Sub-Folder** of **Inbox** from which you wish to move the receipt.

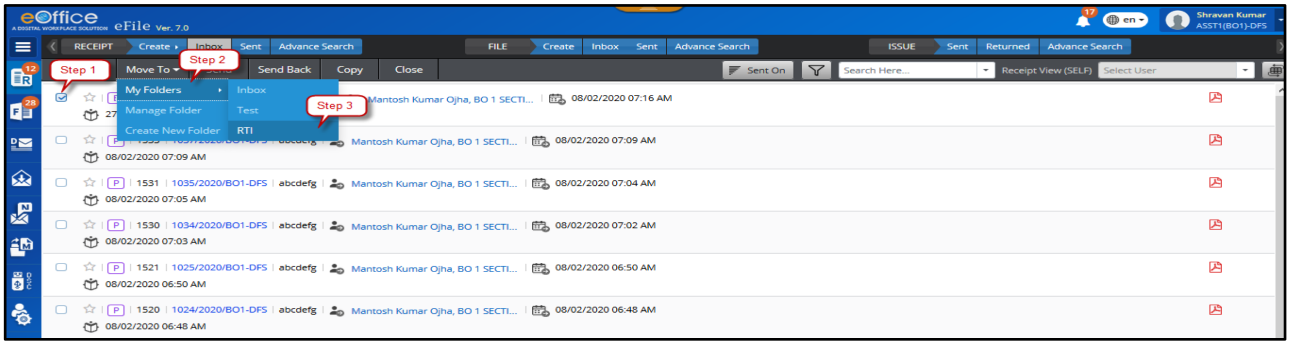


Figure 19

2. Click **Move To** in the menu bar, Click **My Folders**.
3. Choose the destination folder from dropdown list under **My Folders**. (*Receipt will move to selected folder*).

Sub-Folder Management

The Inbox sub-folder management primarily consists of following Actions –

- **Rename** – This is useful, in case the title name of the folder is to be corrected with spelling or a more suitable title.
- **Delete** – In cases where the sub-folder(s) are not required anymore, they can be deleted provided they are empty.

This section describes the steps to rename and delete a sub-folder.

1. Click **Manage Folders** sub menu under **Move To** menu in File/Receipt Inbox List page:

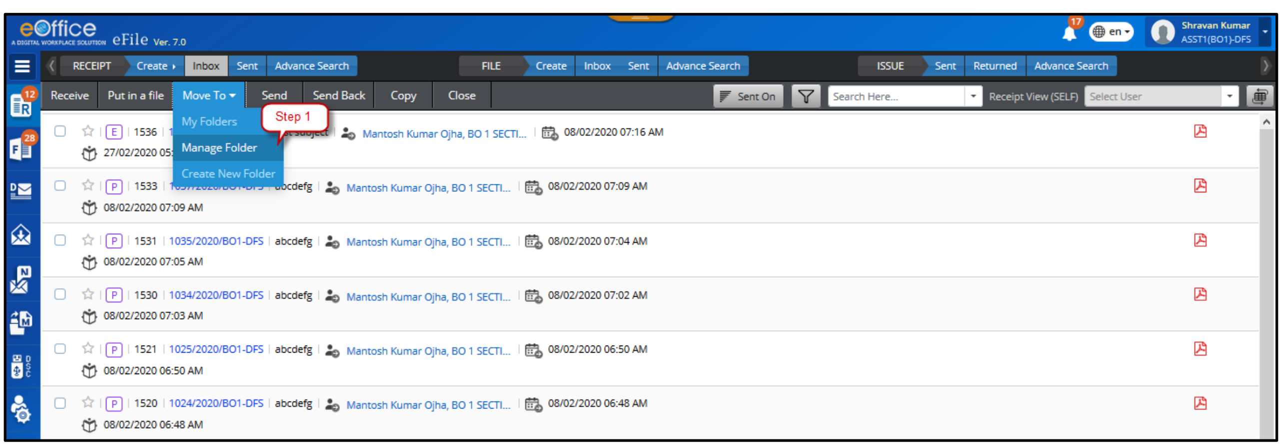


Figure 20

STEPS TO RENAME SUB-FOLDER NAME

2. Click **Edit** icon adjacent to Folder in List of Folders. Clicking Edit Icon will display Update Folder Pop up:

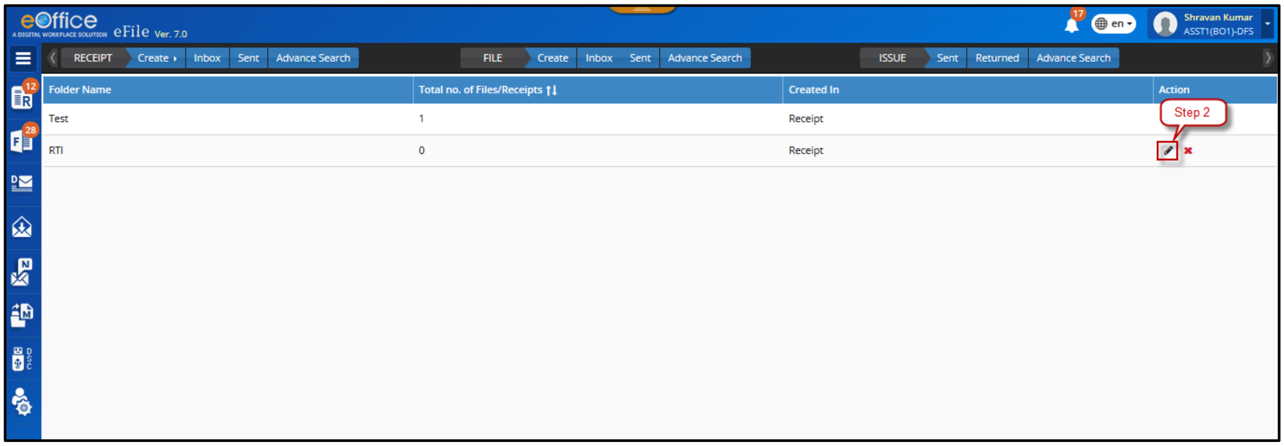


Figure 21

3. Update the **Folder Name** and click **Save** button to finalize changes:

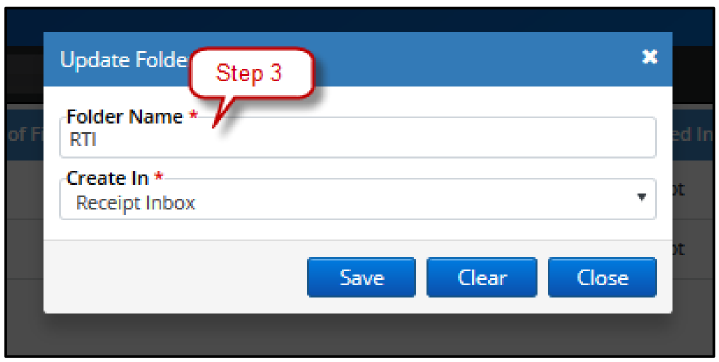


Figure 22

STEPS TO DELETE SUB-FOLDER

2. Click Delete Icon adjacent to Folder in List of Folders on Manage Folders Page:

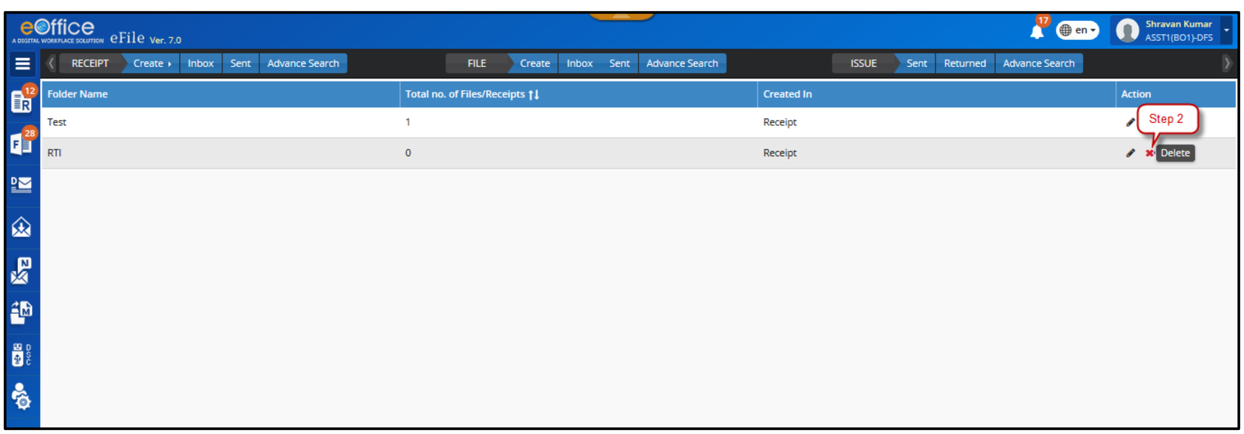


Figure 23

3. Click **OK** Button on the Confirmation Pop up to delete the folder:

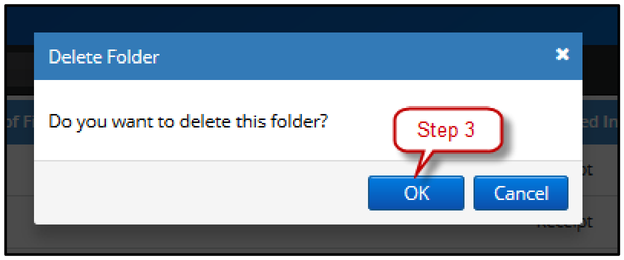


Figure 24

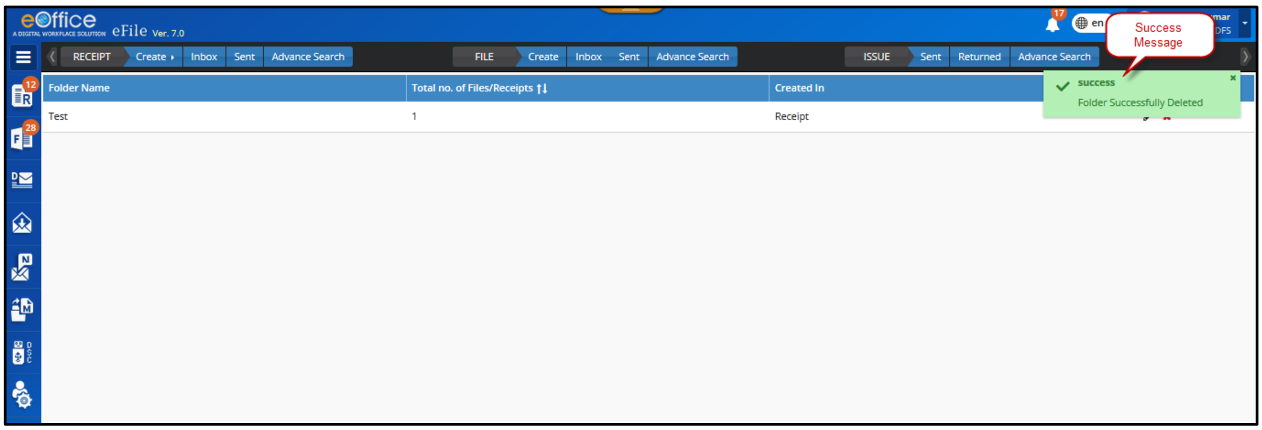


Figure 25

Note:

- Folder to be deleted must be empty.

Edit Receipt (P/E) Details

The editing of a receipt is to update some details/fields with additional or correct information only to make it more relevant.

This is useful when any employee has forwarded you the receipt only with little information available with them. It is important that existence of the receipts may be made more relevant with appropriate information to make their search easy and reports more meaningful.

Important Points:

- ✓ Only main Receipts available in **Inbox/Inbox Sub- Folder/Created** list can be edited.
- ✓ CCs (copies of receipt) cannot be edited. Any changes in the main receipt will be reflected in CC receipt until Main or CC receipt put inside the file.
- ✓ The uploaded document can only be replaced for receipts in Created list only.
- ✓ Physical receipts in Inbox that need be edited must be in received state.

STEPS TO FOLLOW:

1. From the Inbox/Inbox Folder/Created List –

   Click receipt number to open receipt, or Right click on receipt number to **'Open'** in same or '**Open in Tab**' to open in different tab of the browser:

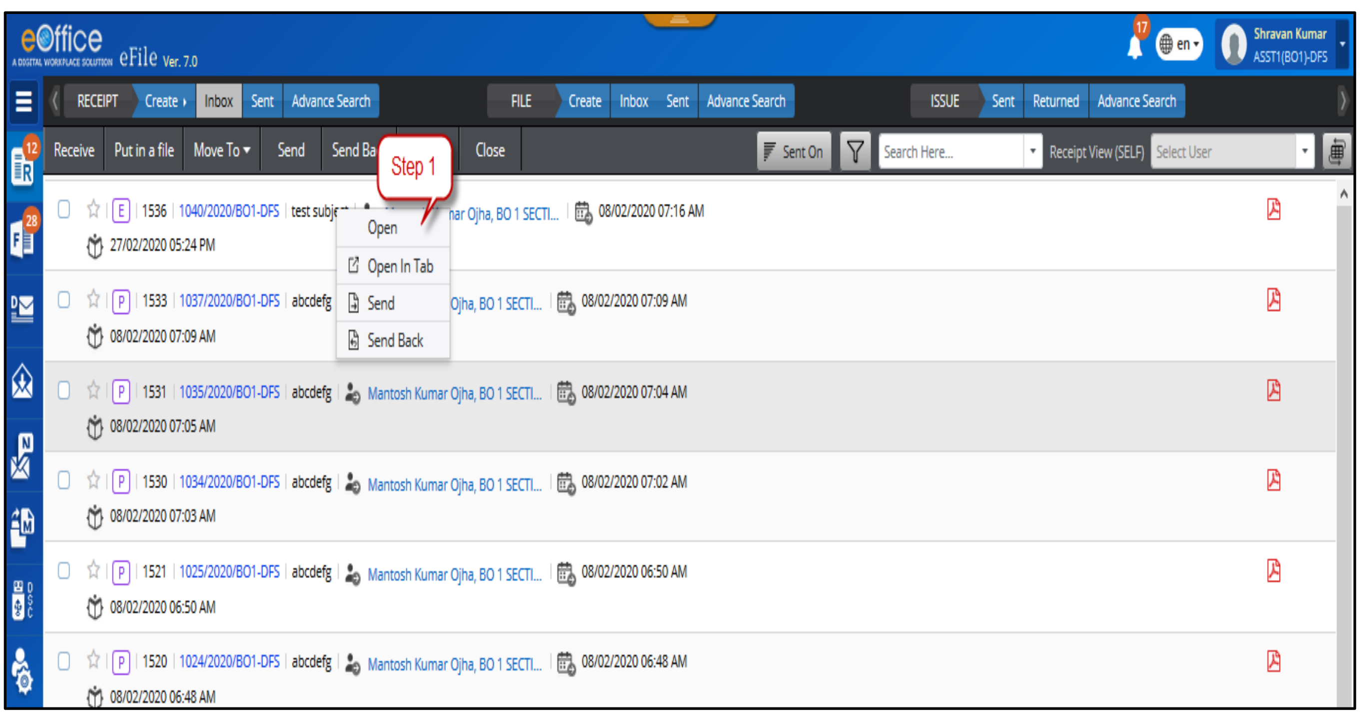


Figure 26

2. Click **'Edit'** menu as shown in Figure.27:

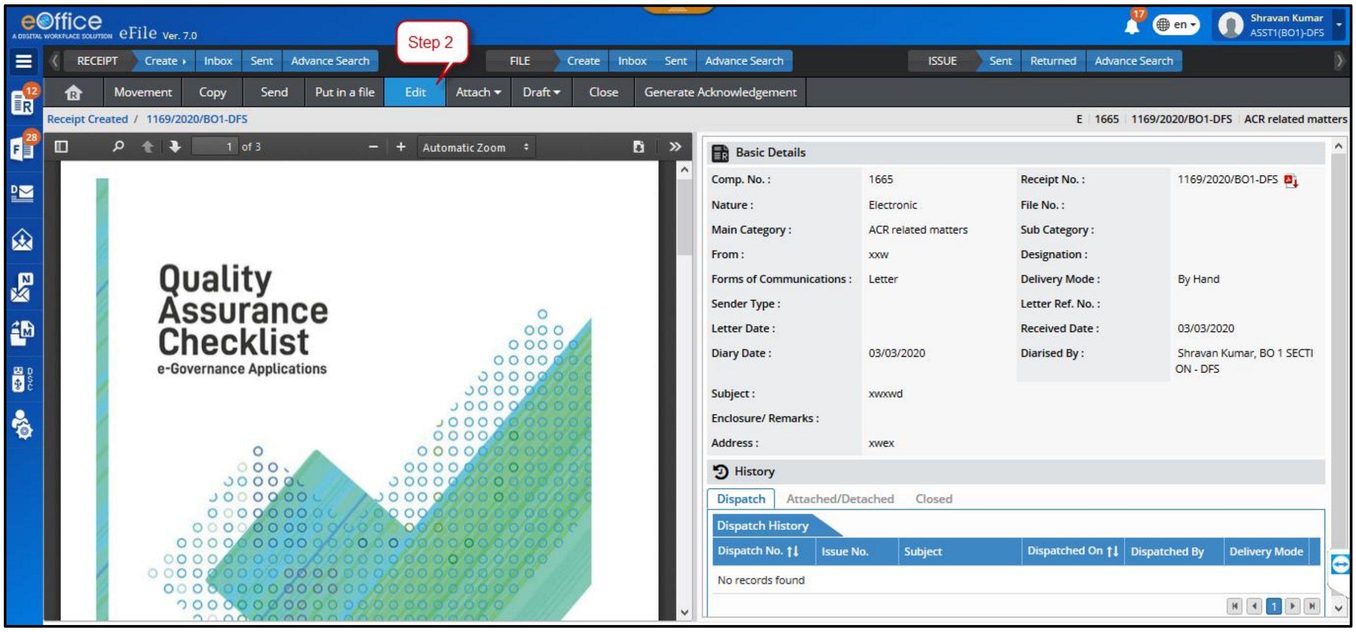


Figure 27

3. Make the necessary changes in the **Diary Details**, **Contact Details**, **and Category& Subject** of the receipt as shown in Figure 28:

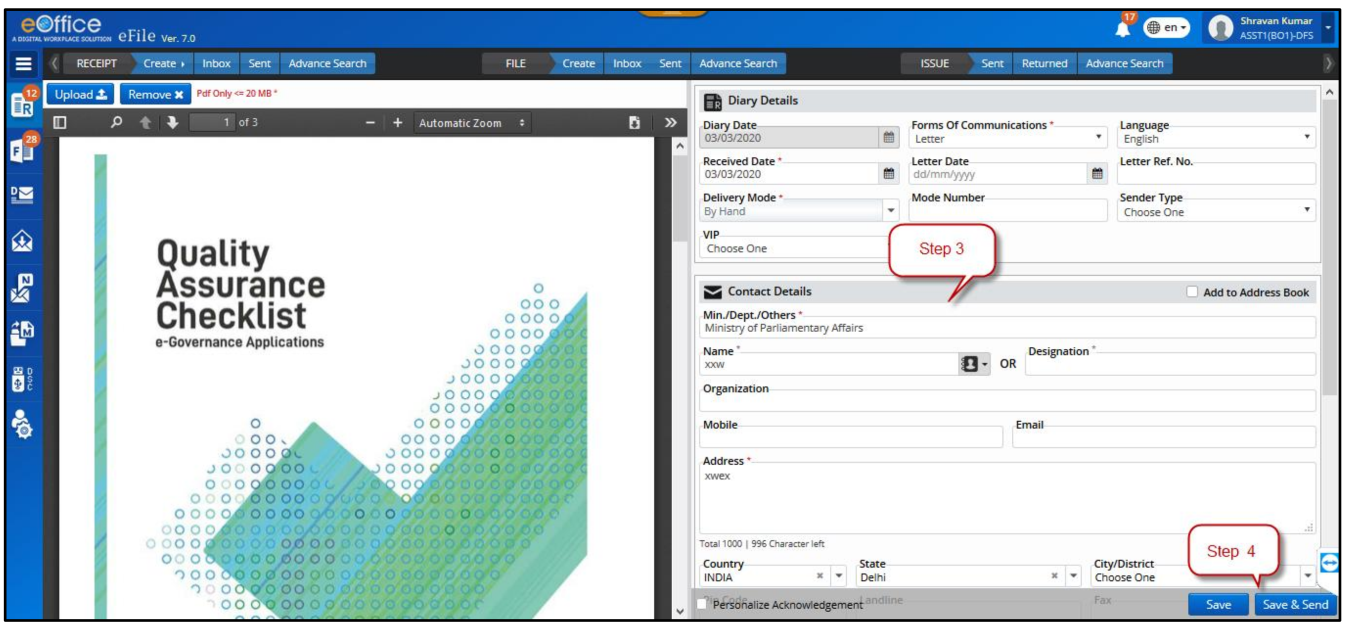


Figure 28

4. Click **'Save'** to save the changes or **'Save and Send'** button to save the changes.

Note:

- User will be able to edit the meta-data (Except **Delivery Mode, Diary Date and Enclosure** (***Configurable***)) of main receipt in **Inbox/Inbox Folders**. (CC receipt should not be editable)
- User should be able to edit Delivery Mode, Enclosure and PDF for created main receipts.

Receipt Details

The receipts details consist of all the information recorded when it was diarized into the system. These details are by far most important when it comes to knowing the history of the associated letter received and action done so far. Along with the uploaded scanned DAK of a receipt user is able to check receipt's information like it is **Subject, Diary Date, Receipt No**., list of **Drafts** prepared, List of letters **Dispatched** against it, **Attached/Detached** Receipts/Files, **Closed** History, **Movement** details, etc.

Steps to view Receipt Details:

1. Click a receipt number in **Inbox/Inbox Sub-Folder/Created/Sent/Closed** list as shown in **Figure 29**:

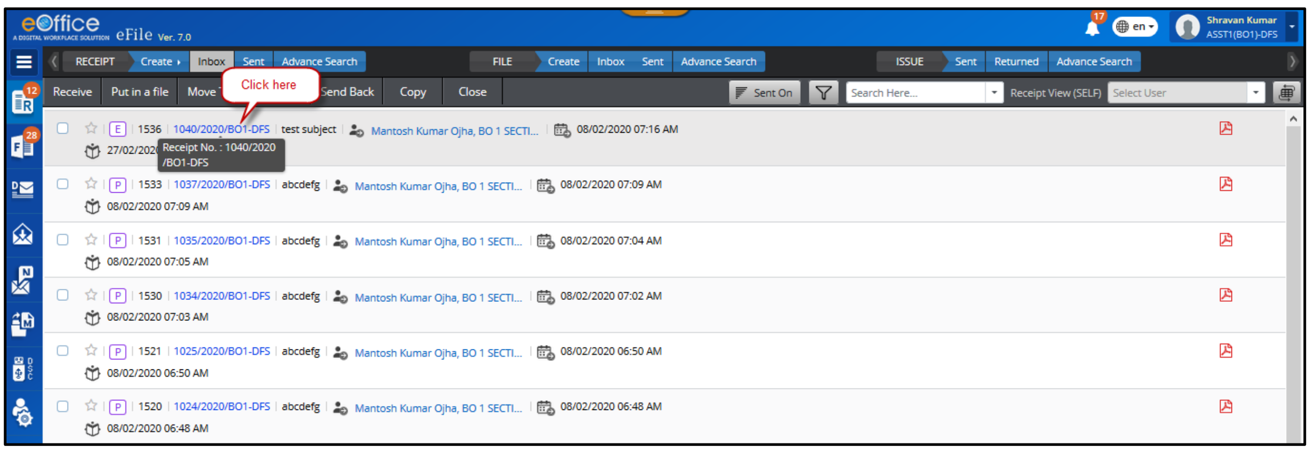


Figure 29

Note:

- Physical receipts should be in received state to view its details in Inbox/Inbox Folder.

Description:

1. **Menu Bar** – Various actions that can be taken on the receipt are available in the menu bar. These action buttons are as follows –
   a) **Receipt Home** – Displays the receipt inner page with its details. Upon clicking on the receipt number, by default, Receipt Home is opened. It is useful when you are on some other screen (example, SEND screen) in a receipt, and wish to go back to receipt inner details page.

   b) **Movements** –Displays the movement history of the receipt from one user to another with respective movement details such as its timestamp and remarks. The most recent movement is available at the top and the first movement at the bottom of the list.

   c) **Copy** –Copies the pre-filled diary, contact and subject details to a new diary screen. This is useful to save effort in entering details when diarizing multiple 'DAKs/Letters' from same the sender or on similar subject. With updating little information after using COPY (if required) a new receipt can be generated.

Note:

- The feature to copy the uploaded scanned document is also available and is configuration based only. This will useful when same letter is required to be diarized multiple times but with different receipt/diary numbers. This approach varies from organization to organization.

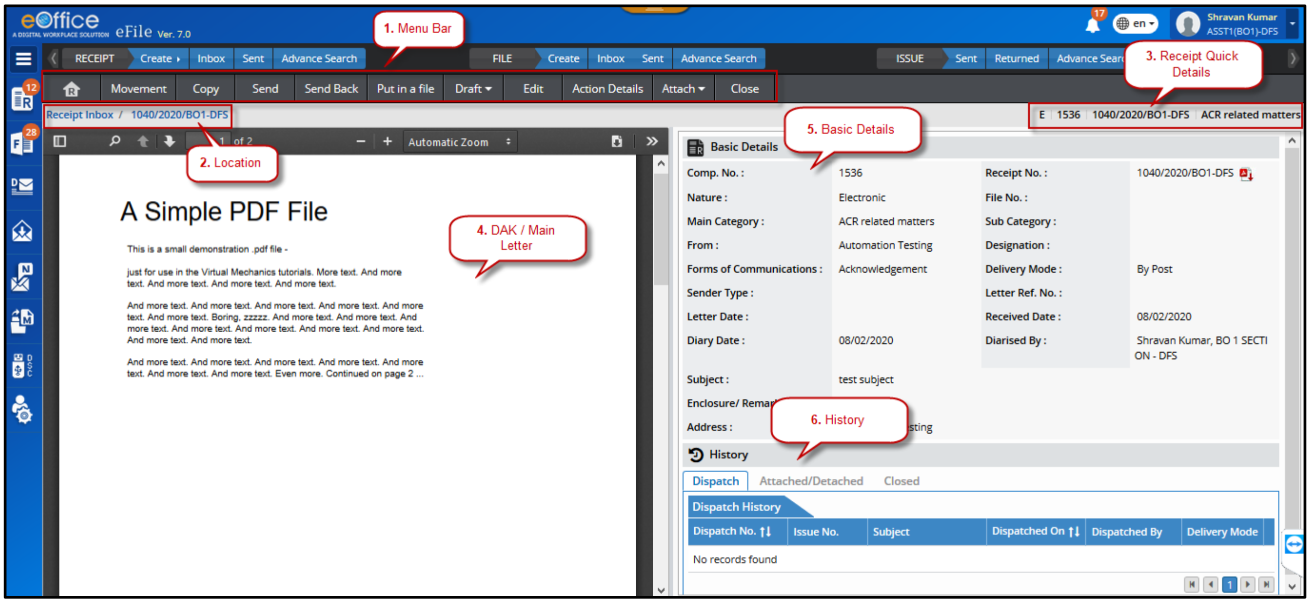


Figure 30

d) **Send** – This option allows you to send receipt to multiple other users. Clicking on it re-directs to Receipt Send screen where a user may enter other user details in TO and CC (to mark copies) along with forwarding remarks, assigning due date, priority and setting e-mail – SMS alerts for the recipients and other people in previous movement for intimation.

e) **Send Back** –This option is useful in case user wishes to send back the receipt from whom it was received. The user details in **To** field of the send screen is pre-filed by clicking **Send Back**.

f) **Put in a File** – This option allows a user to put the opened/selected receipt into a file. User may put it in to an existing file lying with the user or create a new file for it.

g) **Draft** –This option allows a user to prepare a draft form of a communication to be issued against the receipt after it is approved and signed using the system.

h) **Dispatch** – This option is available only in case of physical receipts only to record the dispatch details against a receipt.

i) **Edit** –The editing of a receipt is to update some details/fields with additional or correct information only to make it more relevant.

j) **Action Details** – This option allows user to View and Record their comments on Initiated actions on receipt received with Initiated Action.

k) **Attach** – This option allows user to attach the Receipts and/or Files with receipt for reference or other purposes.

l) **Convert** –This option is available in case of physical receipt only. It allows user to convert the physical receipt to electronic receipt.

m) **Close** –This option closes the receipt in case the action on it is complete or not required.

n) **Print/Download** –This option allows user to download receipt attached/detached file/receipt details, closed history, corresponding draft and dispatch details with their letters and attachments**,** movement history, initiated action details and etc., into PDF format**.**

2. **Receipt Quick Details** – Shares some quick information about the receipt opened, such as,

a) Nature – Physical (P) or Electronic (E)

b) Computer number – The unique sequence number of the receipt assigned to it when created.

c) Receipt Number – The unique number of the receipt, in the format***, sequence no./creation year/dealing_section_name***

d) Main Subject Category – The main subject category under which it belongs, chosen at the time of diarisation and can be edited later.

3. **DAK / Main Letter** – The letter received by the organization which was originally diarized. In case of physical receipt, it may not be available, since it is not mandatory to upload its scanned copy for tracking purpose.

4. **Basic Details** – Displays the basic details of the receipt, such as, its sender's name and address, subject, enclosure details, delivery mode, receiving date, diary date, letter date, type of communication and etc.

5. **History**

a) **Dispatch** – Details of issue letters dispatched against a receipt, such as, its dispatch and issue number, subject, date, dispatch by user's name and delivery mode.

b) **Attached/Detached** – Details of file(s)/receipt(s) attached and detached such as their numbers, subject, action performed by user's name, date and time of action with remarks.

c) **Closed** – Details of the number of times the receipt was closed and re-opened by user's name on specific date and time with the action remarks.

Put a Receipt inside a File

To record decisions on the note sheet against a receipt, it is necessary that the receipts may be put inside a file as correspondence. This section describes how to put up a receipt in a file.

Important Points:

- ✓ Physical receipts can be put inside a physical file only. To put it inside an electronic file it needs to be converted.
- ✓ Electronic receipts can be put inside both Electronic/Physical file, if required.
- ✓ Receipts with Attached files/receipts are not allowed to be put in file. They are required to be detached first.

STEPS TO FOLLOW:

1. Select receipt *(Figure 31)* or Click open receipt, from receipt Inbox or Created list.

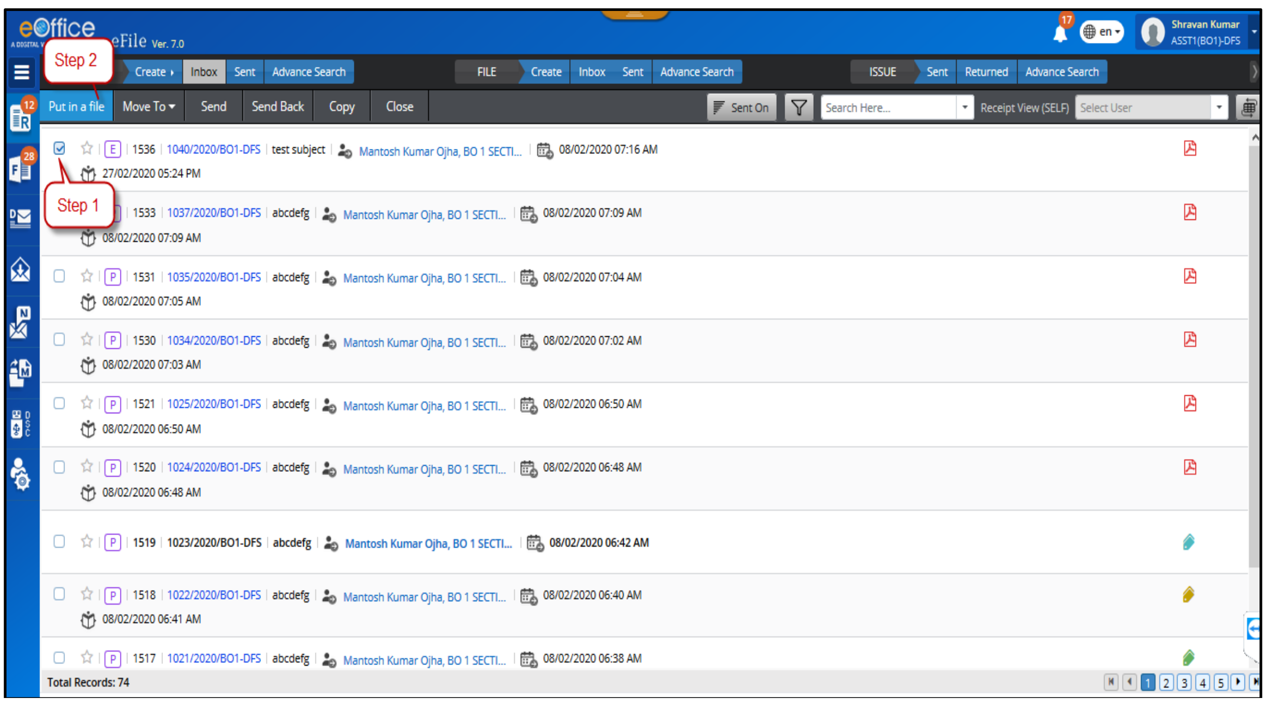


Figure 31

2. Click '**Put in a File**' menu as shown in Figure 32:

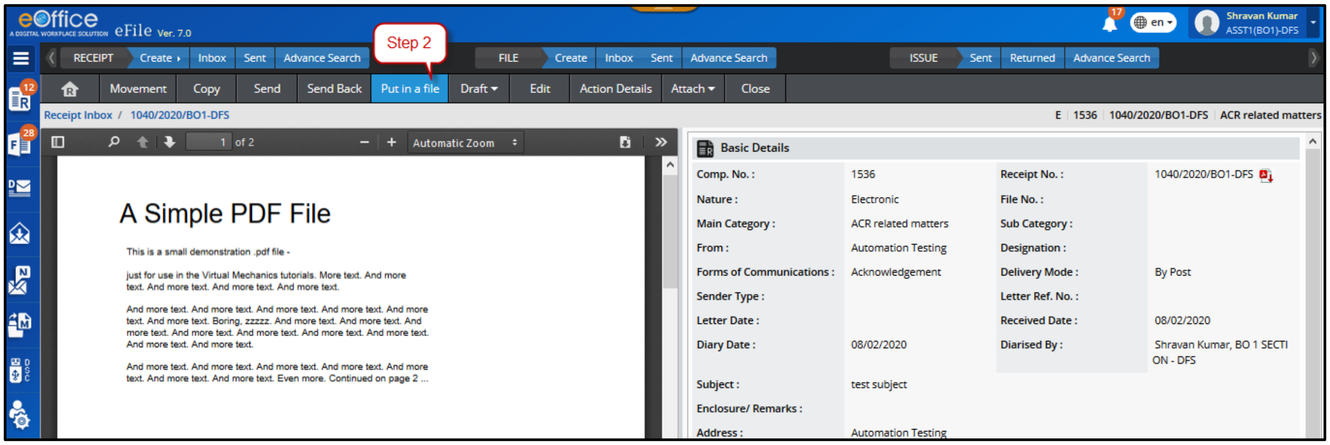


Figure 32

To put the receipt in an existing file already available with you, continue with the following steps *(Figure 33).*

3. In the pop-up window, select or search the file from list displayed.

4. Provide mandatory **Remarks**.

5. Click **Attach** as shown in Figure 33:

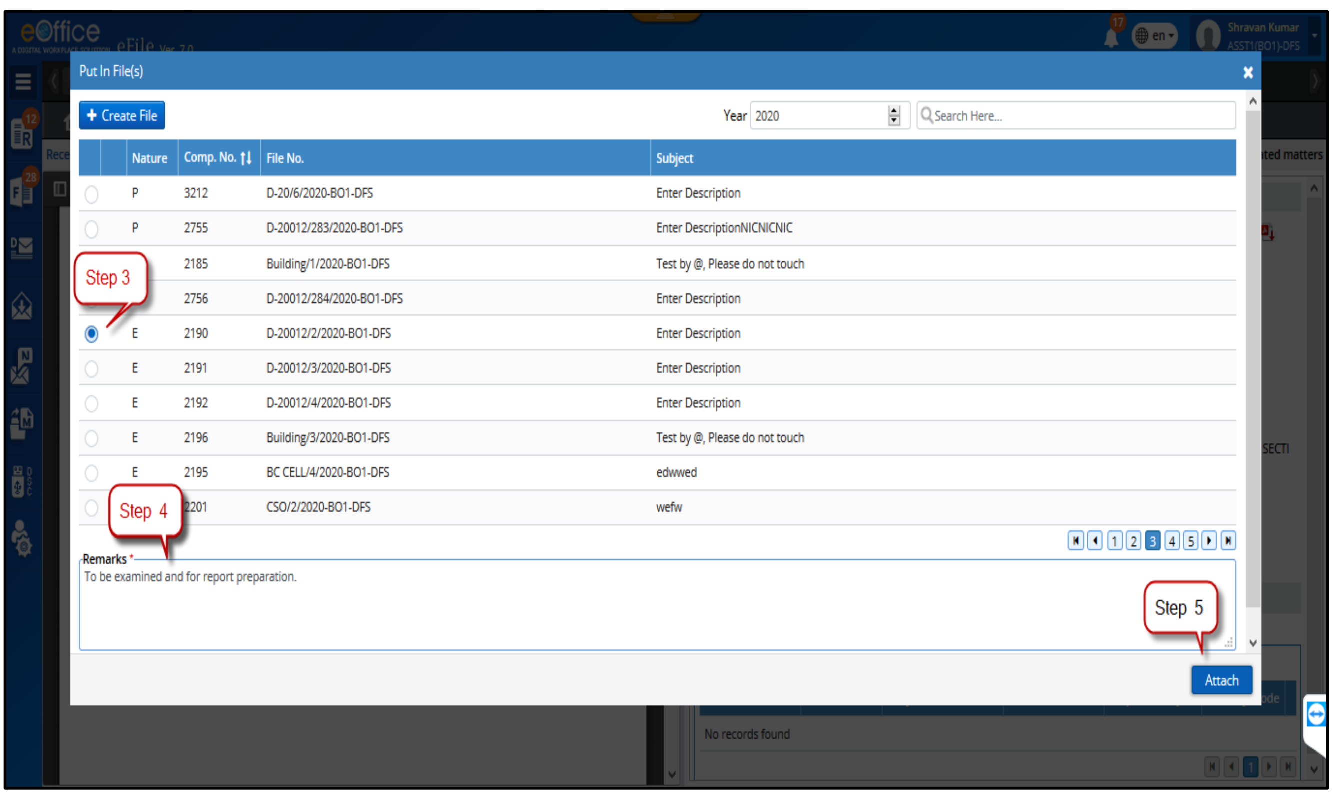


Figure 33

Or

To P**ut the receipt in a new file**, continue with the following steps

3. Click **Create File** in **Put in File** pop-up window as shown in Figure 34:

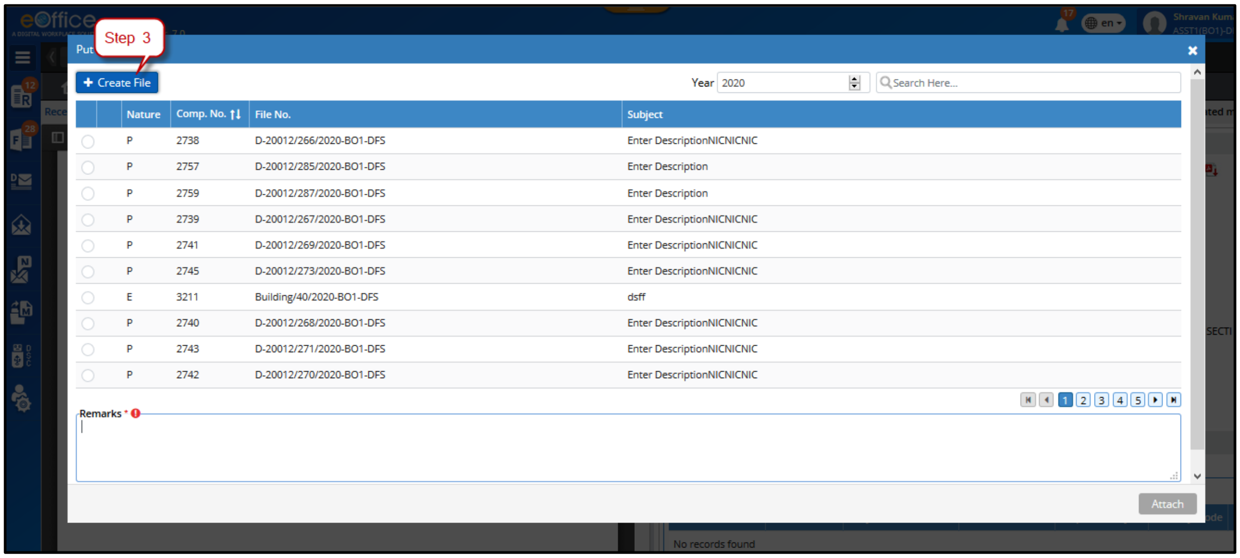


Figure 34

4. Select **Nature** of File ***(Electronic/Physical)*** using radio button on File Cover page. (For Physical Receipt, Nature of file will be physical only).

5. Select **Type** of File ***(SFS/Non-SFS)*** using radio button on File Cover page.

6. **For Non-SFS** - Select the File-Heads from the available drop-down list under 'File No'.

Or

For SFS - Enter desired file number in the File Number text box.

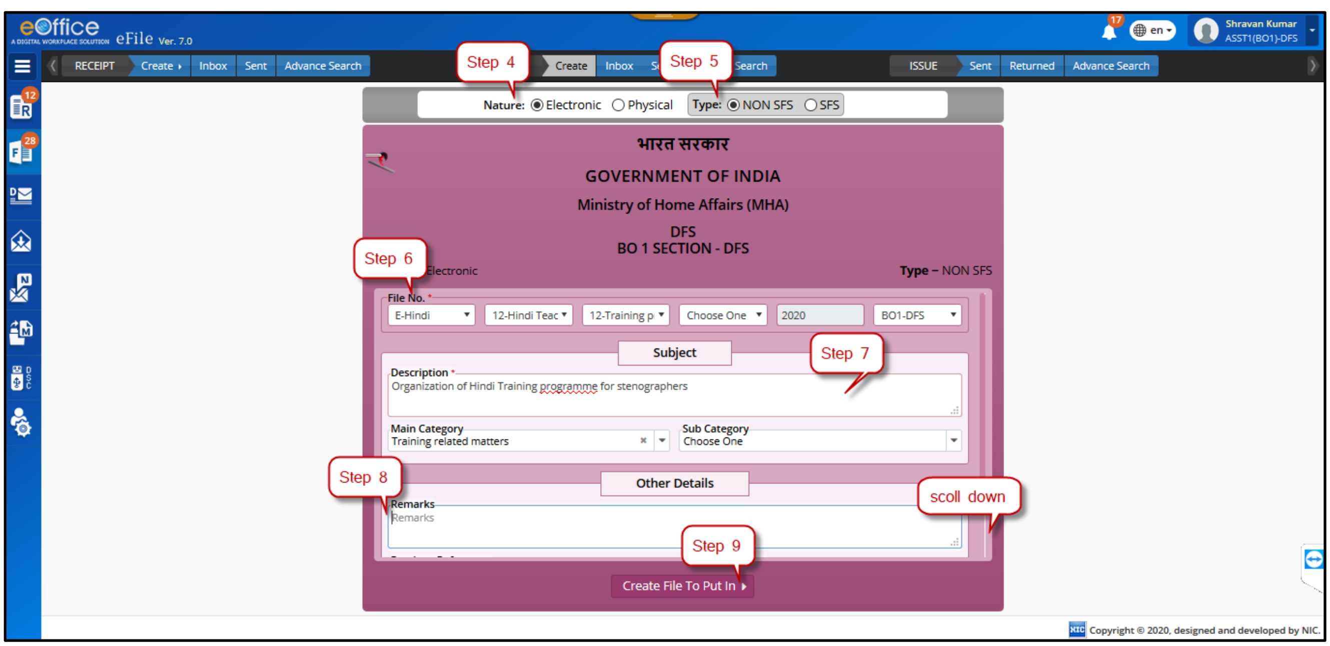


Figure 35

7. Enter the mandatory **Subject Description**.

8. Provide other relevant details like Main Category, Sub Category, Remarks, Previous References, Later References and Language.

9. Click **Create File To Put In**.

10. Confirm on the action by clicking on **Proceed** option.

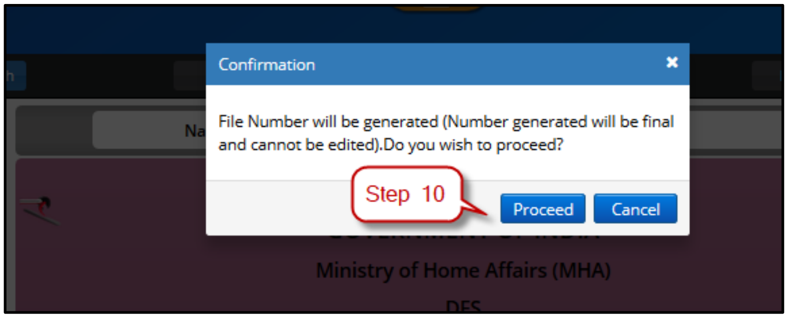


Figure 36

11. Provide mandatory **Remarks** to put receipt in a file and Click **OK**.

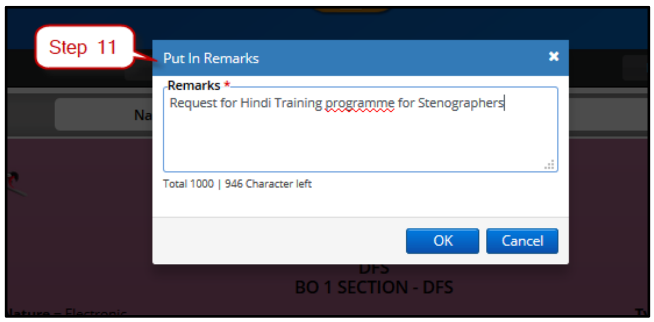


Figure 37

Convert Receipt

This feature is required to convert physical Receipt to electronic receipt.

Important Points:

- ✓ Physical receipts in Inbox/Inbox Folder/Created can be converted to Electronic Receipt.
- ✓ Physical Receipt in Inbox/Inbox Folder should be in received state.

STEPS TO FOLLOW:

1. Click opens a Receipt to view receipt inner page from **Inbox/Inbox Sub-Folder/Created** list.
2. Click **Convert** menu. (*Receipt conversion page will open*).

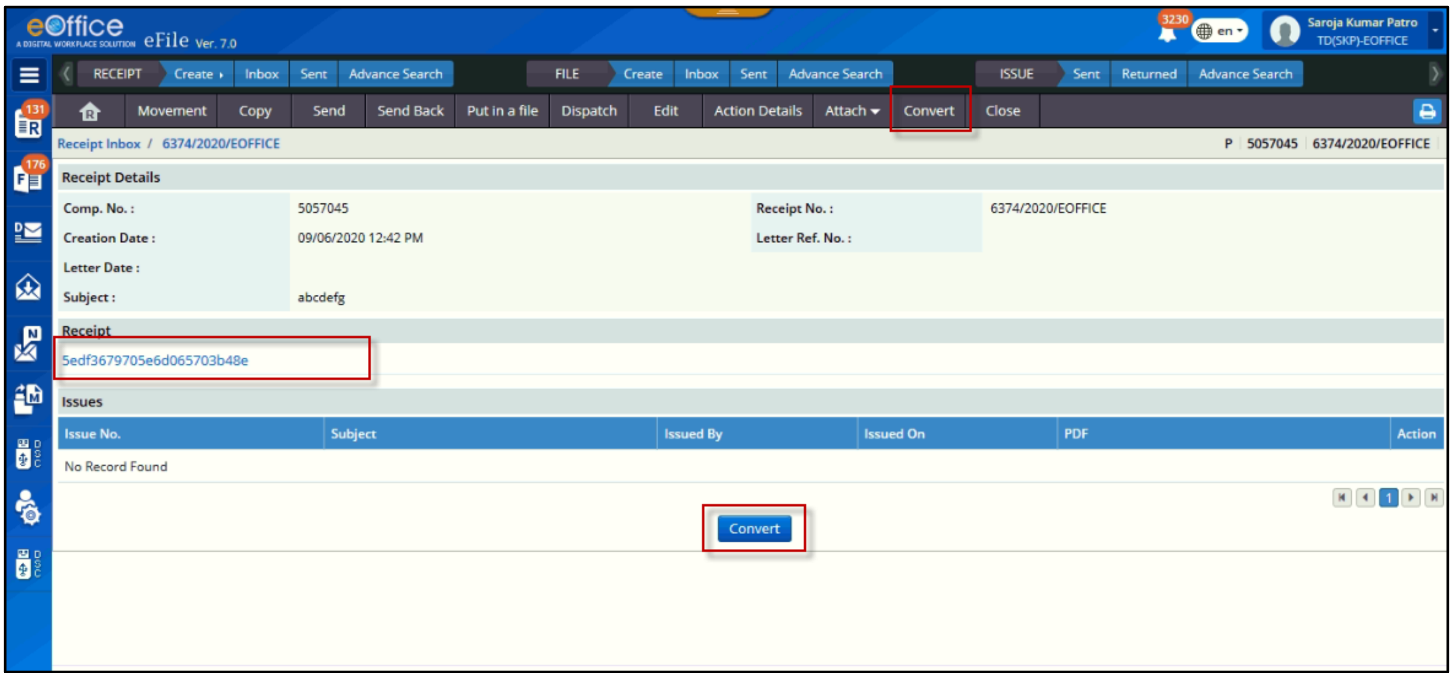


Figure 38

3. **Upload** Scanned DAK/Letter. (*PDF format only*)
4. Click **Convert** Action button.

5. Enter mandatory Conversion **Remark** and Click **OK** to convert physical receipt into electronic as shown in Figure.39:

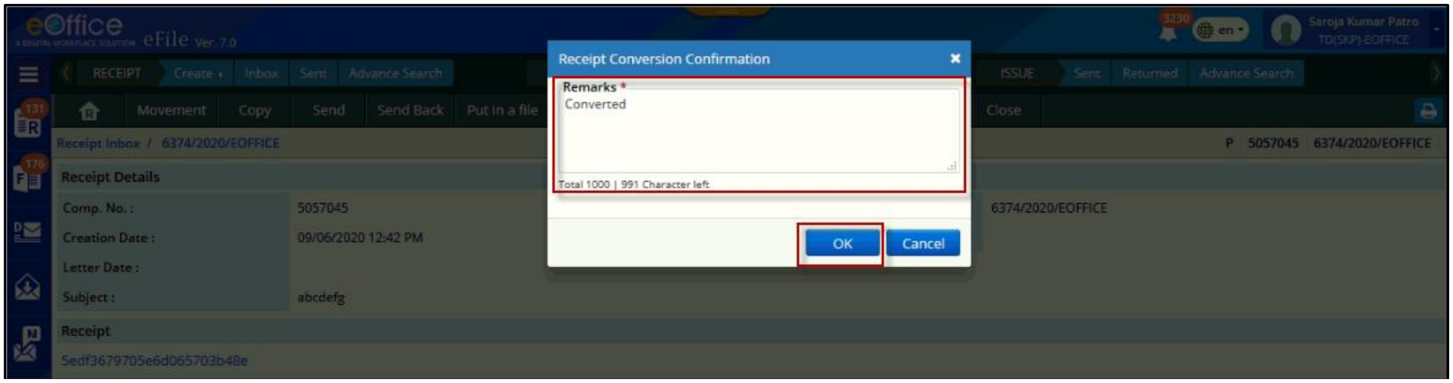


Figure 39

Note:

- Conversion of Receipt is required as physical receipt are not allowed to Put in an electronic File or Attach in an electronic File.

Receipt Attachments

This feature is required to attach files and receipts, as required, with a receipt. In this case, the attached receipts and files are attached along with the main receipt in original and are moved along with it. This section describes the process of attaching a file or a receipt with a receipt.

Important Points:

- ✓ Files and receipts to be attached and the receipt with which it has to be attached should be in active state i.e. in **Inbox/Inbox Sub-Folder/Created.**
- ✓ Files and receipts to be attached and the receipt with main receipt must be in standalone condition i.e. not attached with other File and Receipt.
- ✓ File/Receipt in Parked/Closed/Submitted files for Closing or Reopening Approval/Approval Request will not be available for attachment.
- ✓ Physical Files and Receipts to be attached must be in received state.
- ✓ Files and Receipts to be attached must be **of same nature** (Physical/Electronic) as of the main Receipt.
- ✓ **Attached/Detached Tab** under **History** in Receipt Inner page maintains the details (such as action performed by, date, remarks and etc.) of the attached/detached files and receipts. (*Note: Attach/Detach history will not be maintained if attached Files/Receipts was detached without any movement of the main receipt*)
- ✓ With every movement of the main receipt, the movement history of the attached files and receipts are updated with the attachment remarks until they are detached.

Attaching Files/Receipts with Receipt

STEPS TO FOLLOW:

1. Click opens a Receipt to view receipt inner page from **Inbox/Inbox Sub-Folder/Created** list as shown in Figure 40:

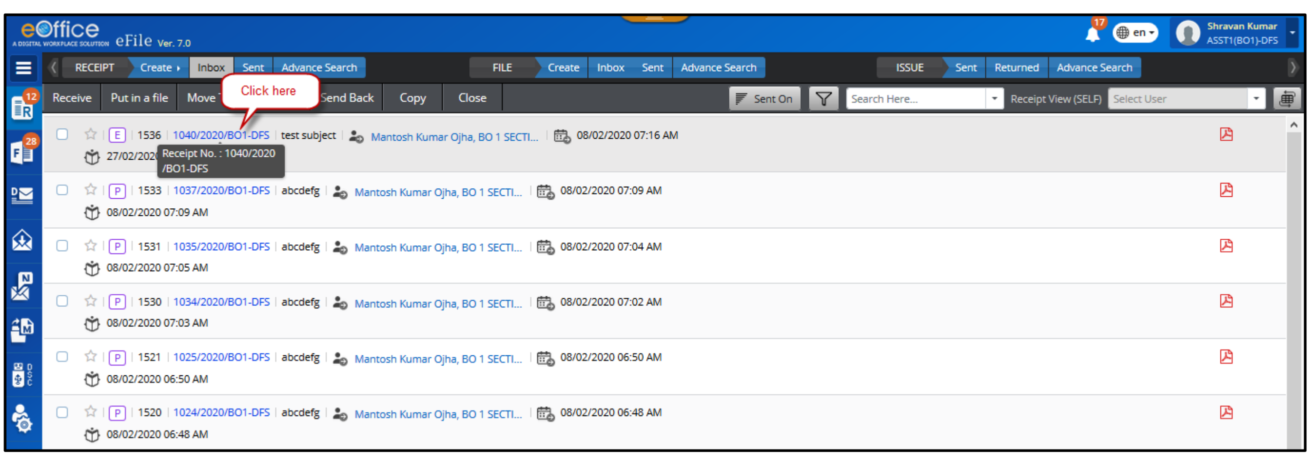


Figure 40

To Attach Files

2. Click **Attach** in the menu bar, and then Click **Attach File** as shown in Figure 41:

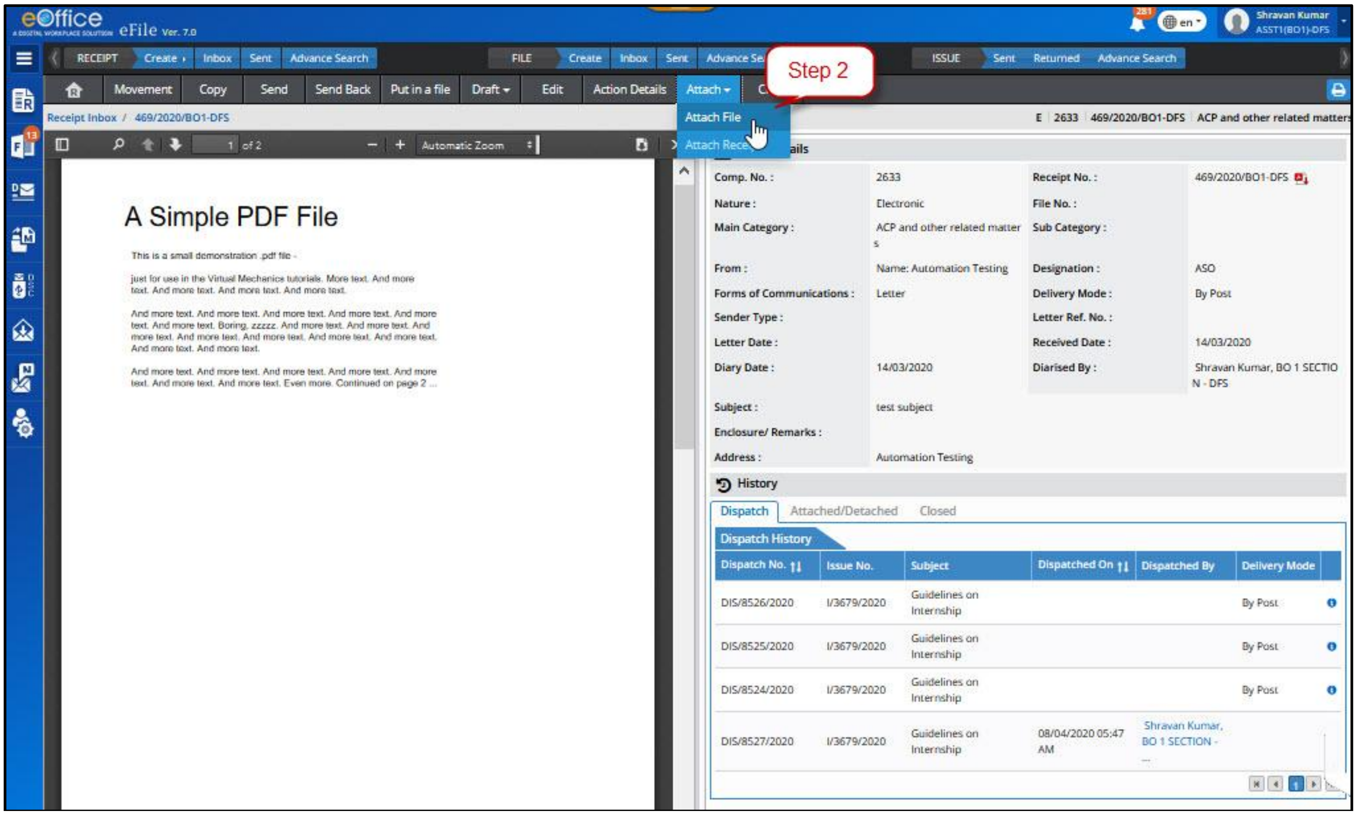


Figure 41

3. On the Attachment page, Click **Attach File** action Button as shown in Figure 42:

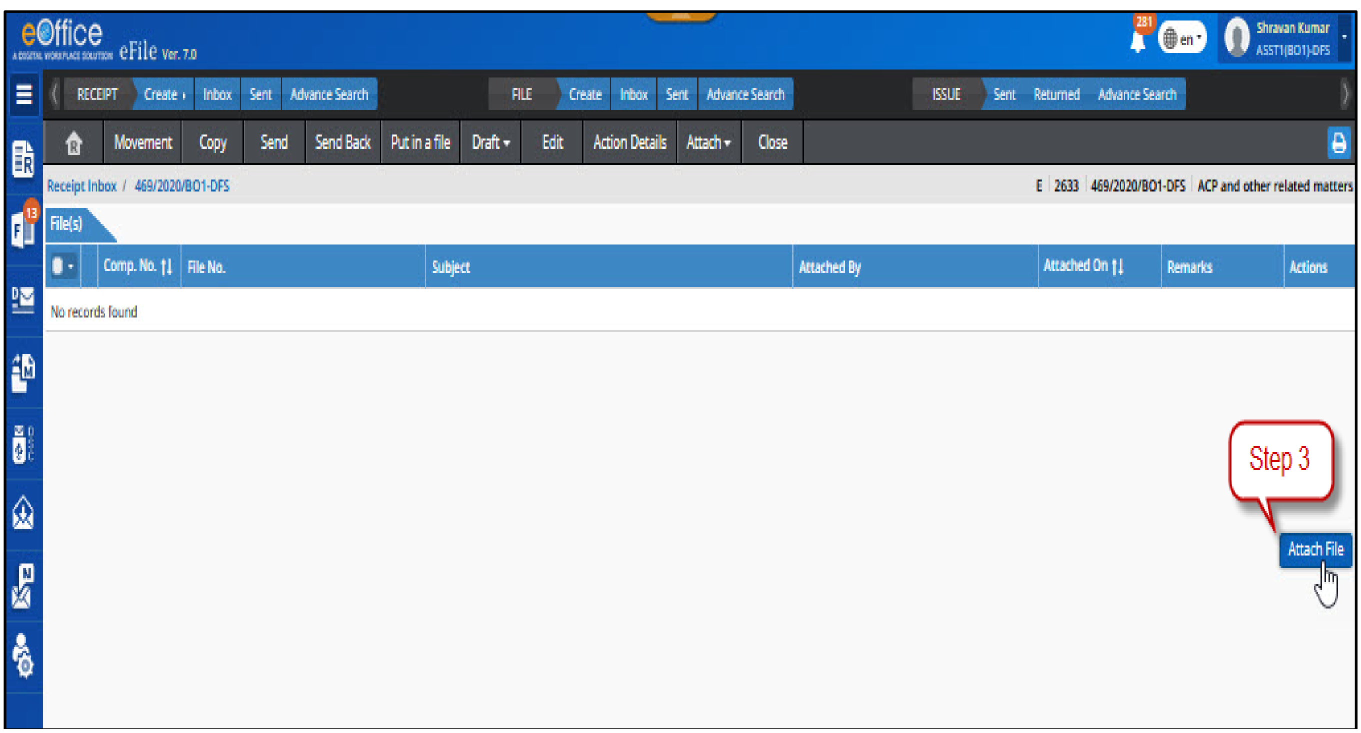


Figure 42

4. In a pop-up window, Files from user's **Inbox/Inbox Sub-Folder/Created** of the same nature are listed. Select the Files to attach as shown in Figure 43:

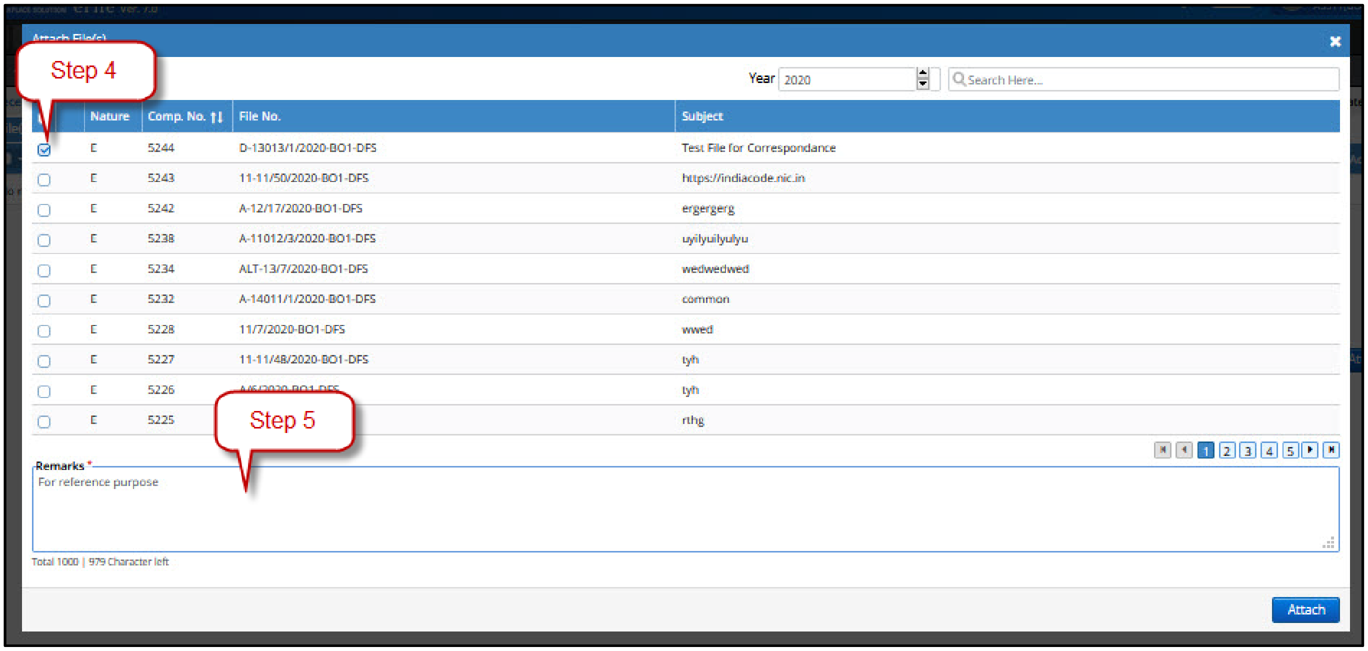


Figure 43

5. Enter mandatory **Remarks** and Click **Attach** to attach selected file.

To Attach Receipt(s)

2. Click **Attach** in the menu bar, and then Click **Attach Receipt** as shown in Figure 44:

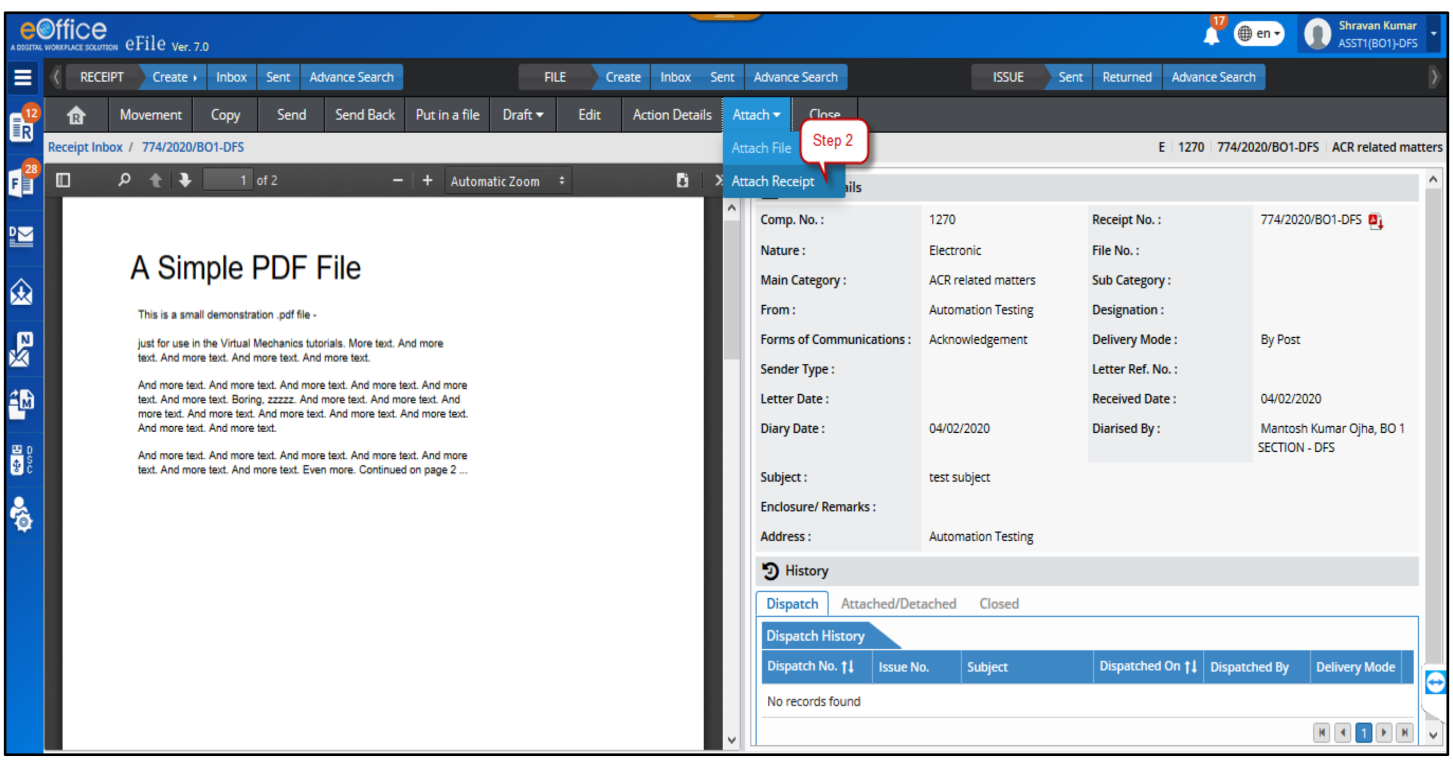


Figure 44

3. On the Attachment page, Click **Attach Receipt** action button as shown in Figure 45:

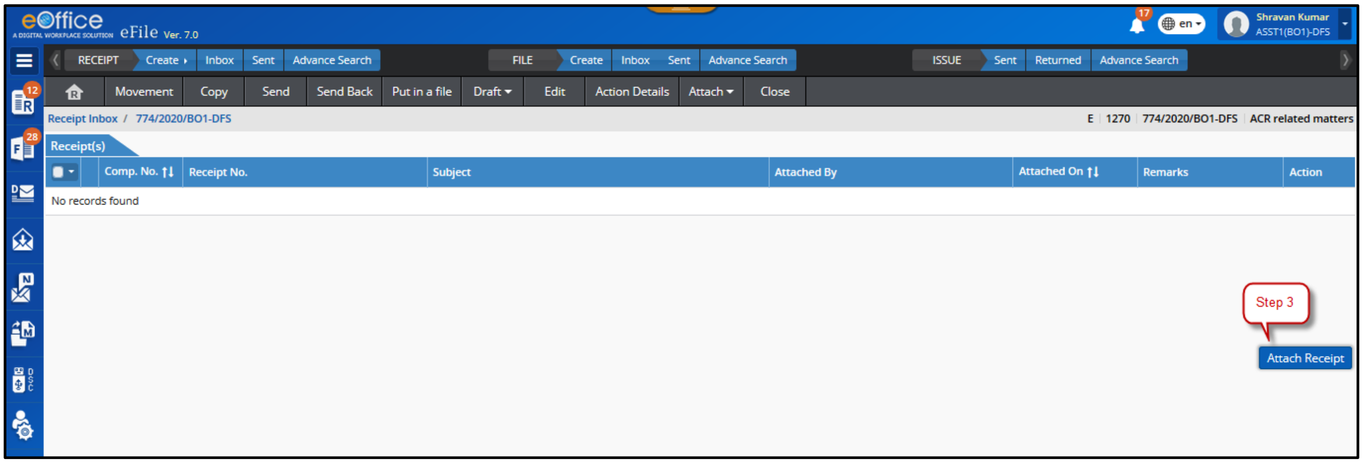


Figure 45

4. In a pop-up window, receipts from user's **Inbox/Inbox Sub-Folder/Created** of the same nature are listed. Select the receipts to attach as shown in Figure 46:

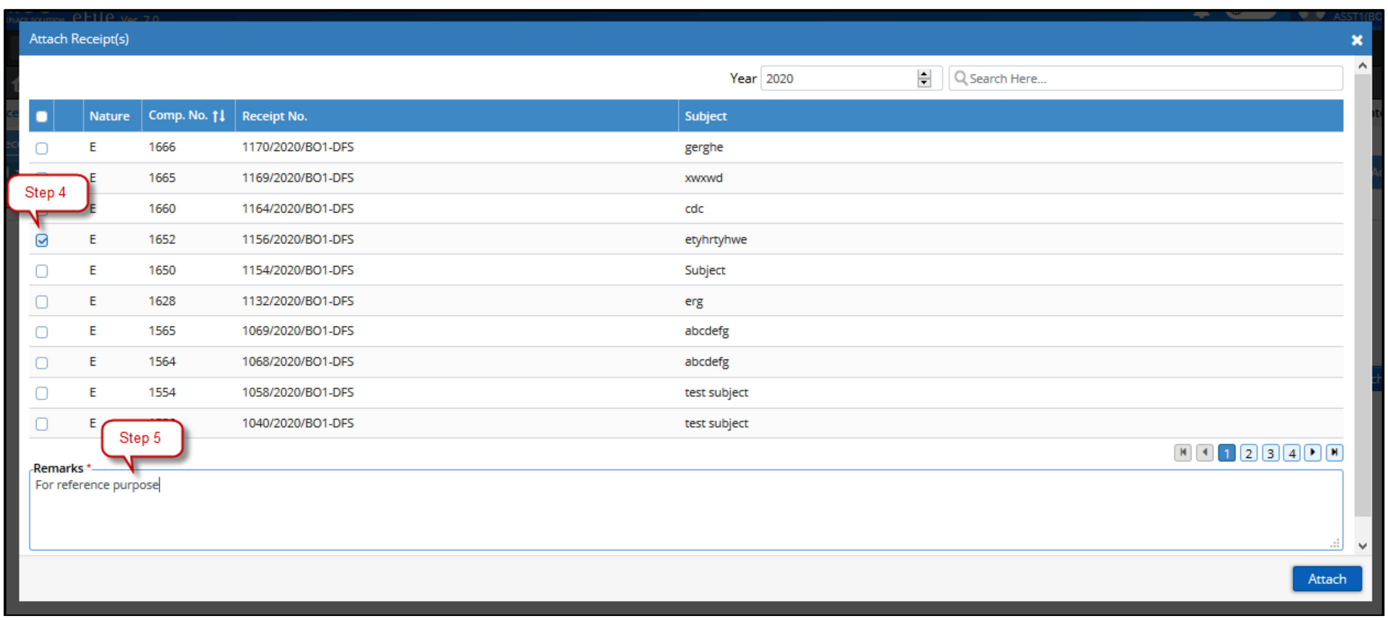


Figure 46

5. Enter mandatory **Remarks** and Click **Attach** to attach selected receipt.

Note:

- The attached files and receipts will no longer be present in the respective folder from which it is attached. Its location will change to the Attach section of the receipt it is attached with.
- Search results for such files and receipts will display its status and location as 'Attached with' Receipt number of the receipt it is attached with.
- Attachment icon next to receipt number in Inbox/Inbox Sub-Folder/Created signifies that the receipt has attached file(s) and/or receipt(s).
- Attached files and receipts are available under the **Attach** option in menu bar.

Detaching Files/Receipts from Receipt

This section describes the process of detaching of an already attached files/receipts from the main receipt.

STEPS TO FOLLOW:

1. Click opens the Receipt from **Inbox/Inbox Sub-Folder/Created**.

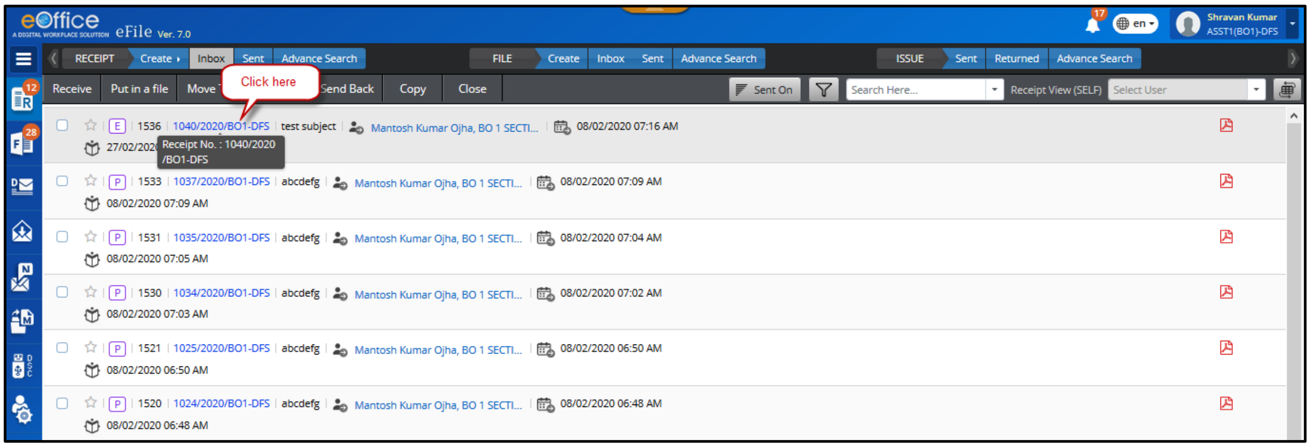


Figure 47

To Detach File(s)

2. Under **Attach** action in the menu bar, click **Attach File** as shown in Figure.48:

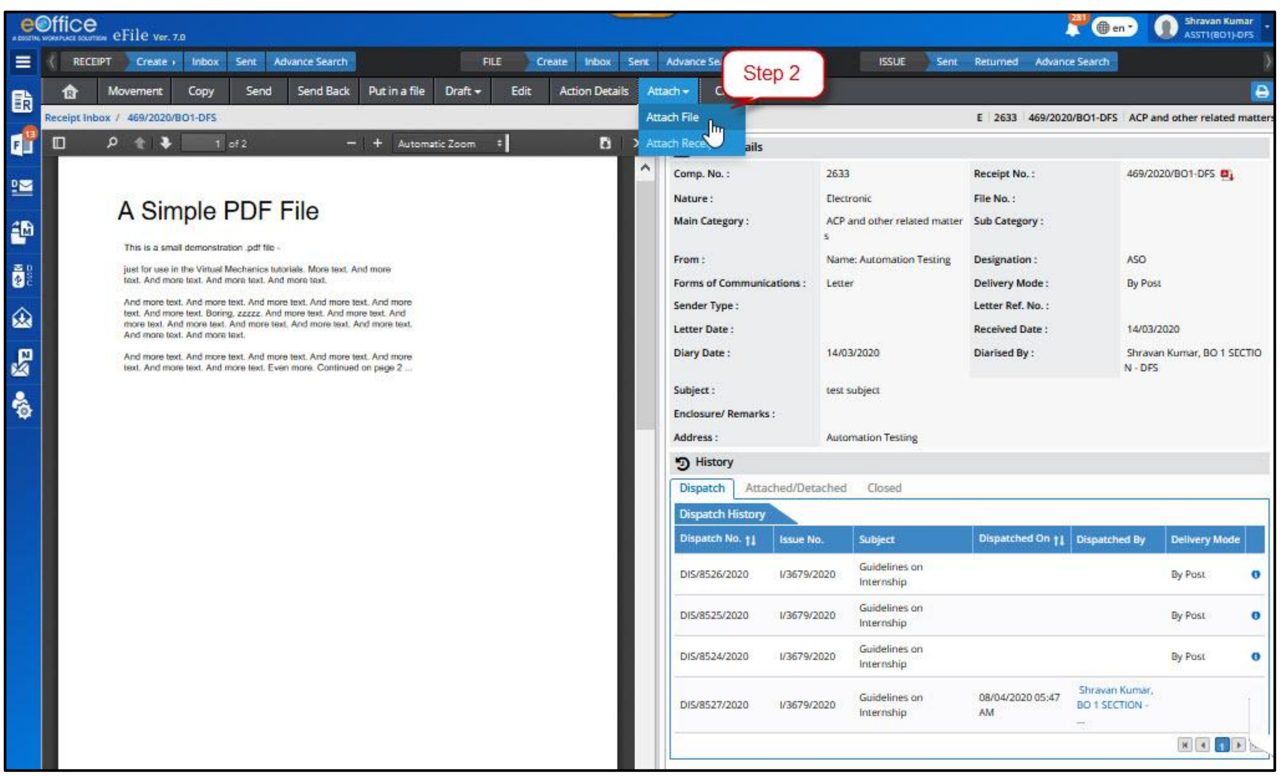


Figure 48

3. Select the File(s) to detach and Click **Detach** action button or Click **Detach** Icon against the attached File record in the list.

4. Enter the mandatory **Remarks** in confirmation pop-up box.
5. Click **OK** button to detach selected files.

To Detach Receipts

2. Under **Attach** action in the menu bar, click **Attach Receipt** as shown in Figure.49:

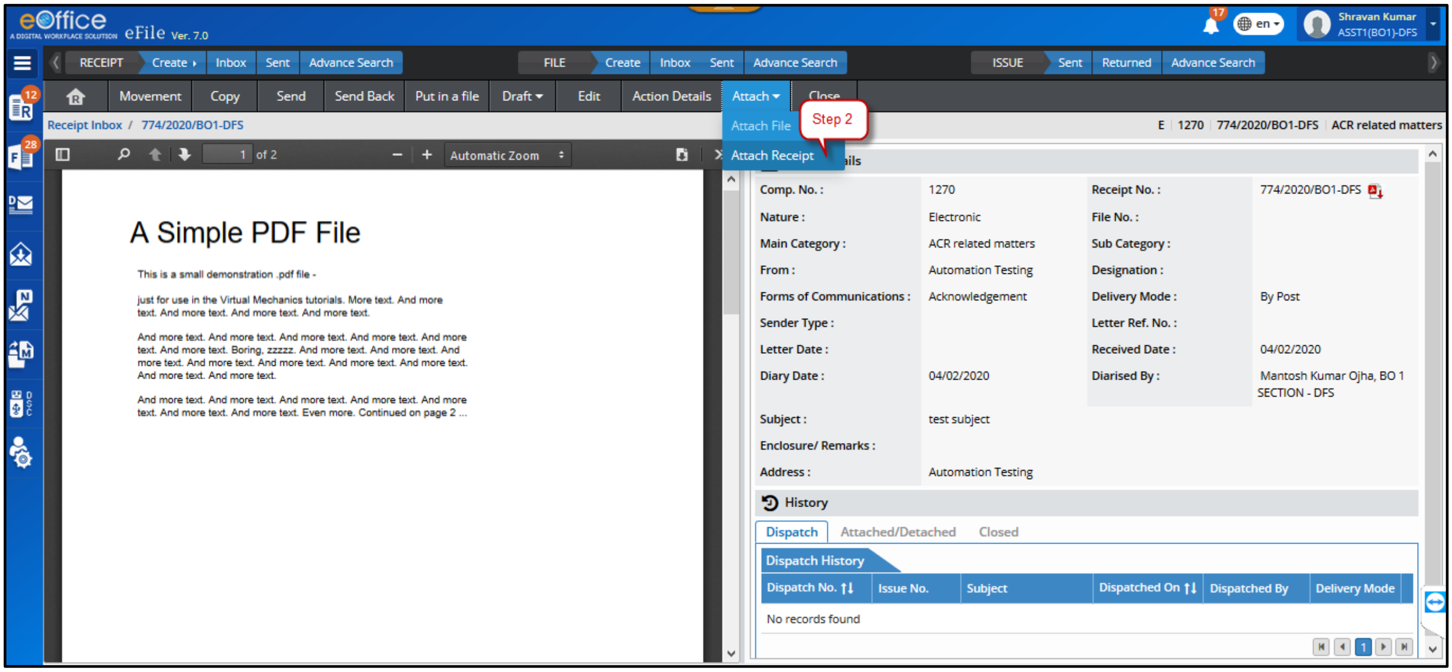


Figure 49

3. Select the Receipts to detach and Click **Detach** action button or Click **Detach** icon against the attached Receipt record in the list as shown in Figure.50:

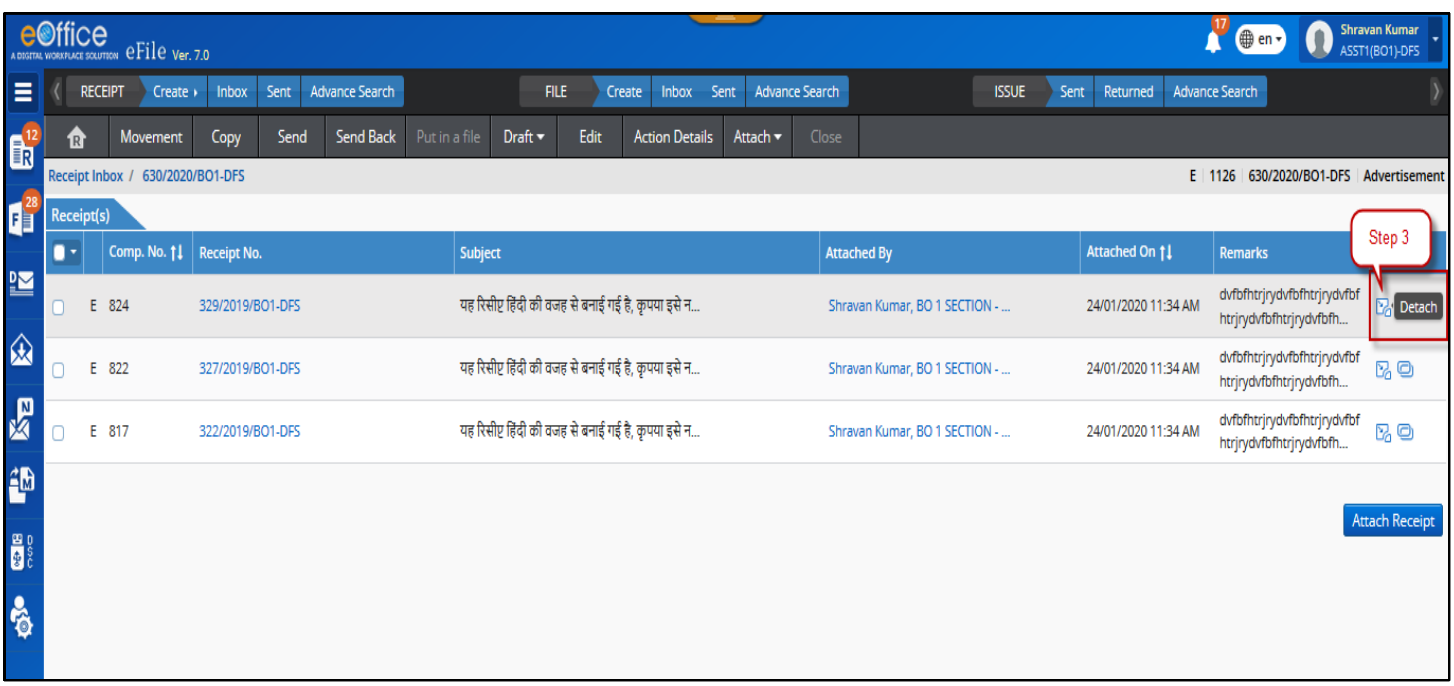


Figure 50

4. Enter the mandatory **Remarks** in confirmation pop-up box as shown in Figure.51:

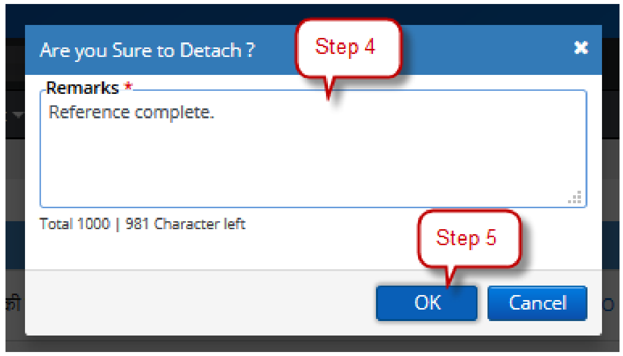


Figure 51

5. Click **OK** button to detach selected files.

Note:

- Detached Files/Receipts will move to Receipt Inbox of the user if the main receipt is in movement after Attach action.
- Detached Receipts will move to its previous location it was attached from if the main receipt was not moved after the Attach action.

Attach with another Receipt

This section describes steps to detach and attach already attached files and receipts with another receipt, simultaneously.

STEPS TO FOLLOW:

1. Click open the Receipt from Inbox/Inbox Sub-Folder/Created.

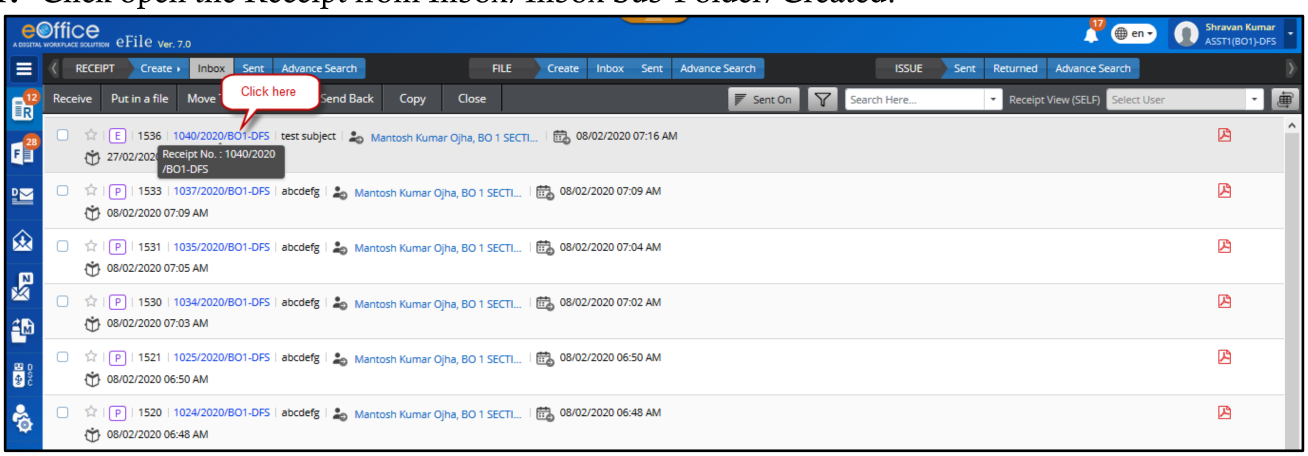


Figure 52

To Detach Files and attach with another Receipt

2. Under **Attach** action in the menu bar, click **Attach File**.
3. Click **Attach with Another** icon adjacent to attached File record in the list.
4. Select the receipt with which you wish to attach it within the pop-up window.

5. Enter the mandatory **Remarks**.
6. Click **OK** button to detach selected files.

To Detach Receipts and attach with another Receipt

1. Under **Attach** action in the menu bar, click **Attach Receipt**.

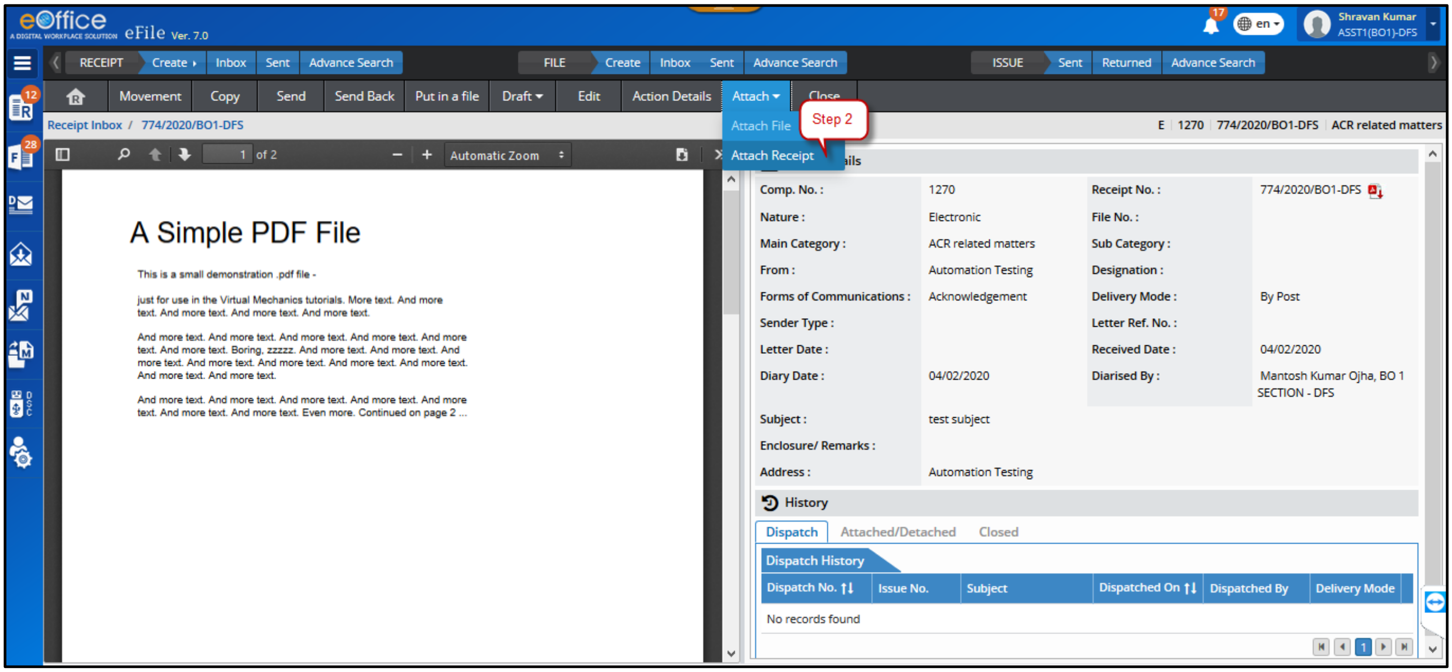


Figure 53

2. Click **Attach with Another i**con adjacent to attached Receipt record is the list.
3. Select the receipt with which you wish to attach it within the pop-up window.
4. Enter the mandatory **Remarks**.
5. Click **OK** button to detach selected files.

Draft Communication

Any communication to be issued against a case or any official letter of the communication is first prepared as a draft letter which after numerous corrections (if required) is submitted for approval and then signed and dispatched. This section describes the process of creating a new draft (Draft Nature: New/Fresh, Reply, Reminder) against an electronic receipt.

Creating a Draft

Important Points:

✓ Drafts can only be created for receipts in Created/Inbox/Inbox Sub-folders and are not attached with other files or receipts.

STEPS TO FOLLOW:

1. Click open an **'Electronic Receipt'** from **Created/Inbox/Inbox** folder list of receipts as shown in Figure .54:

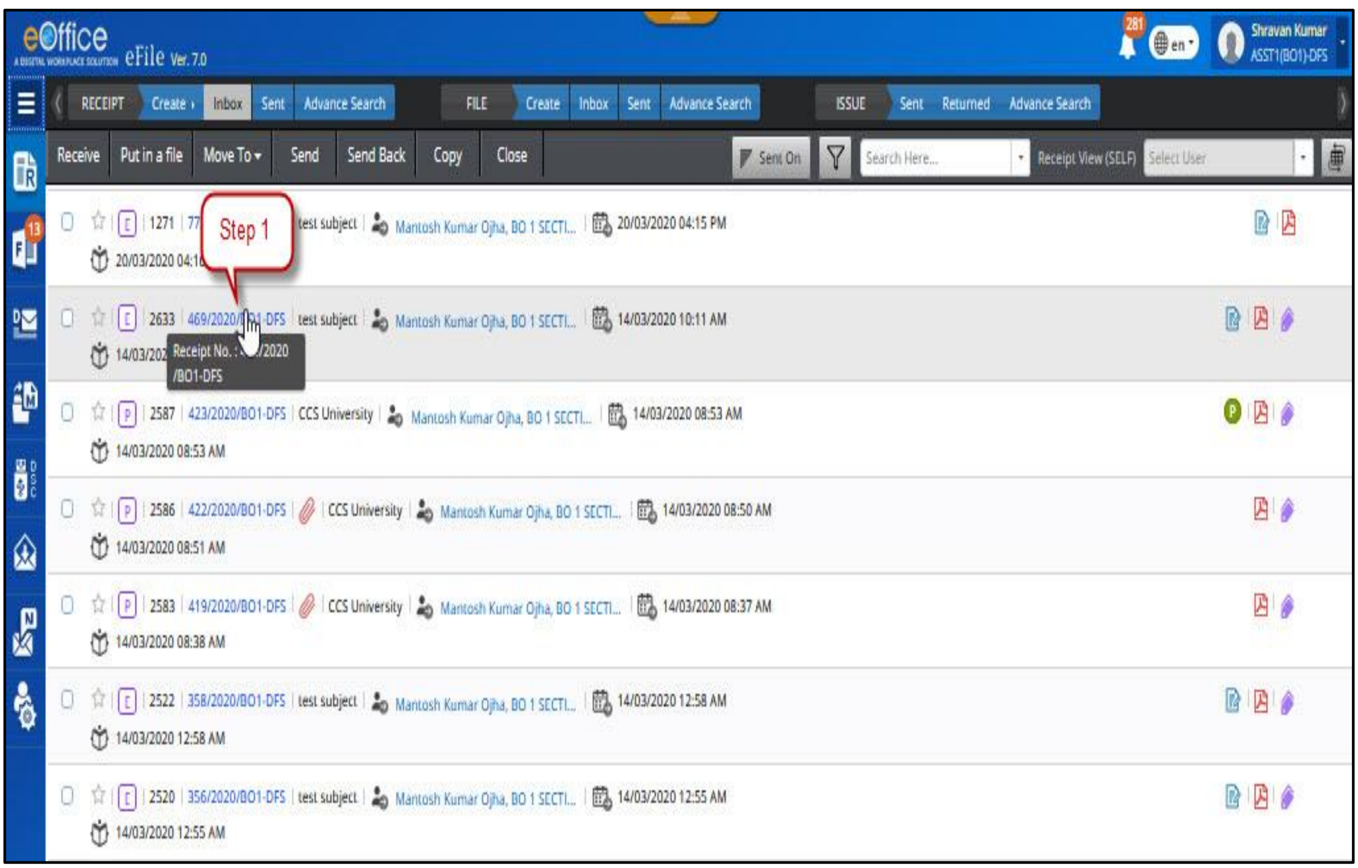


Figure 54

2. Click **'Draft'** in the menu bar and then Click **'Create New Draft'**.

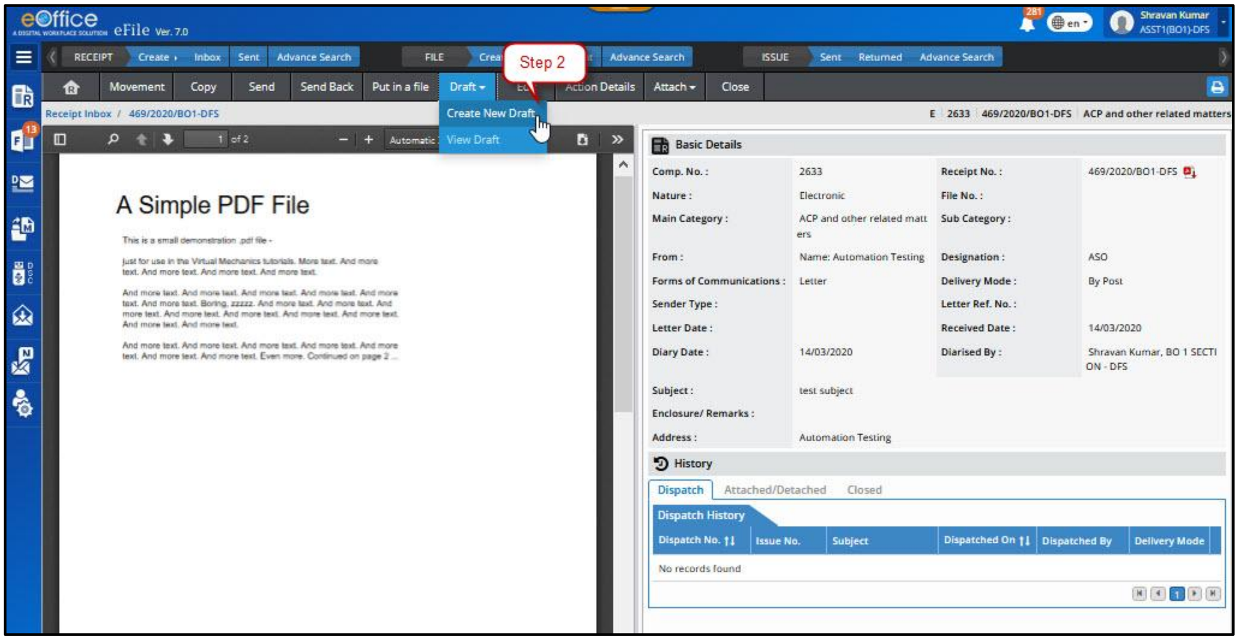


Figure 55

3. Prepare the draft content of the communication on the left side of the screen. The draft content can be prepared by -

   a) **Using Templates** – Preparing content by choosing pre-defined templates i.e. the letter-heads with pre-defined format and content of specific nature.

   b) **Upload Letter** - Preparing the letter on your system using word processor (like MS Word) and then uploading it into the system. (.doc/.docx extension file – Word format)

   c) **Prepare using online editor** - Preparing content by typing and/or pasting from another document file.

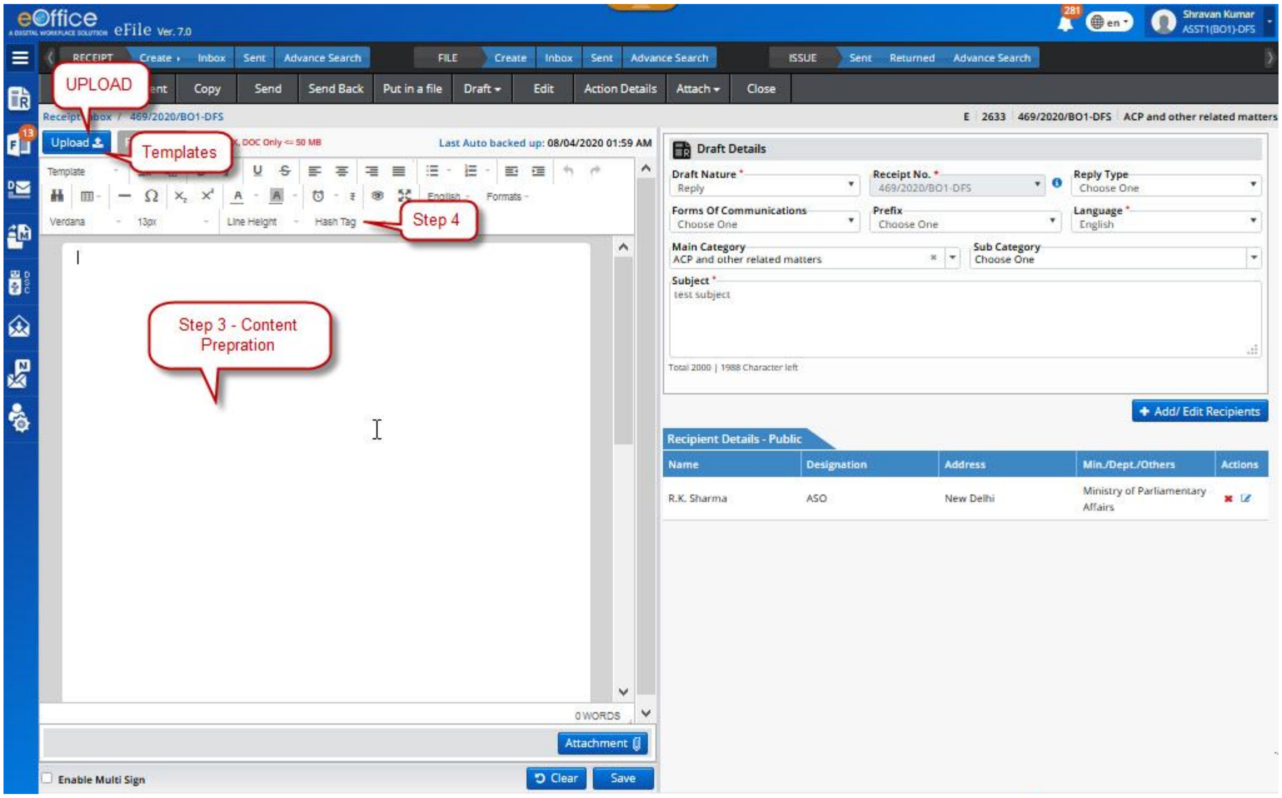


Figure 56

Note:

- The content prepared by uploading a document can only be edited by downloading it using Download option, then make changes in the downloaded document and re-uploading it.
- Content prepared using online text editor can be edited in the same window.

4. Insert **Hash '#' Tags** wherever necessary.

Note:

- **Hash '#' tags** are used to auto-insert the 'Approving authority's' details in the content of the draft being prepared. These details include Approving authority's Name, Post, Approved date and etc.
- **Hash '#' Tags** can only be added to the content built in templates used and with content prepared using online text editor.

5. Add annexure using **'Attachment' option,** if required.

6. Check **'Enable Multi Sign'** checkbox, if required.

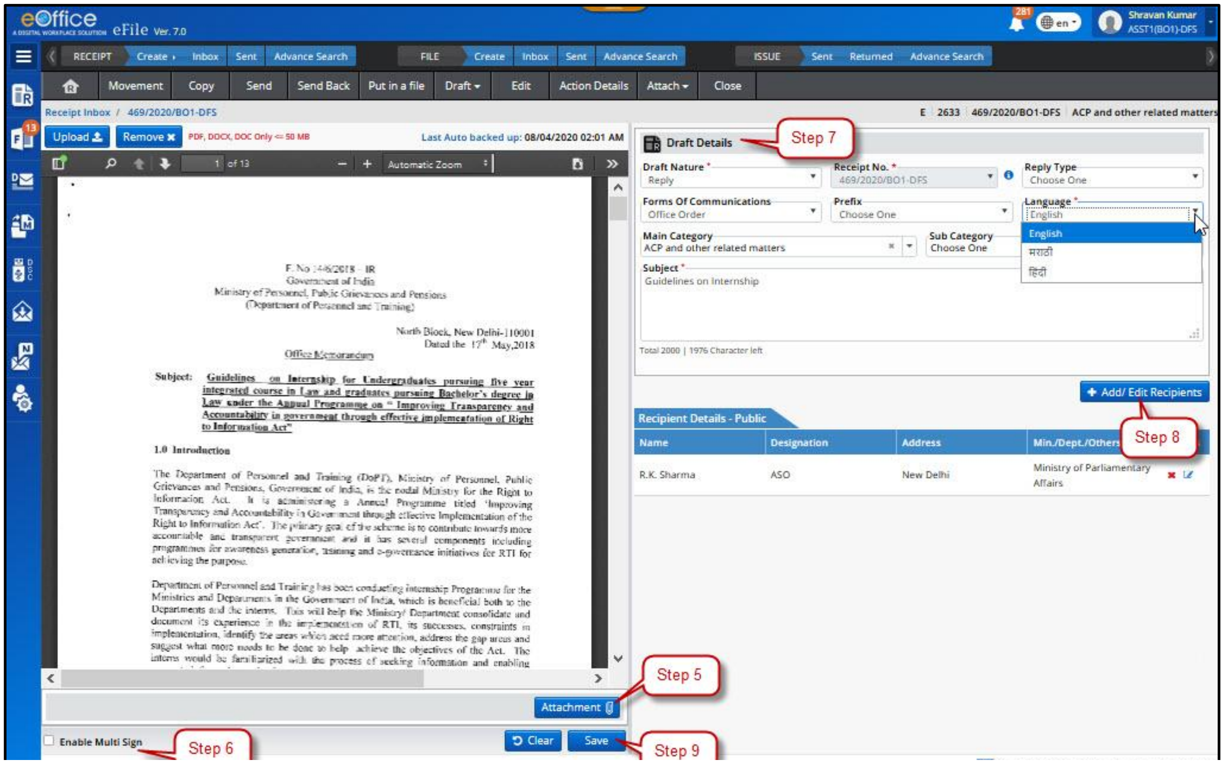


Figure 57

Note:

- **'Enable Multi Sign'** allows multiple users to digitally sign on the same approved draft.
- **'Ink Sign'** option is not available in case multi sign is enabled.

7. Fill in the 'Draft details' on the right side of the screen. Drafts details include Draft Nature, Reply Type, Forms of Communication, Prefix, Language, Subject Category, Sub Category and Subject description.

Note:

- **'Draft Nature' –** Choose -
  New/Fresh – If the draft is being prepared as fresh communication being initiated.
  Reply – If the draft is being prepared as a reply against the receipt.
  Reminder – If the draft is being prepared as a reminder to the previously dispatched communications against the receipt.
- '**Draft Nature**' – '**Reminder**' only available if any Issue/Official communication has been already dispatched against the receipt.
- By default, '**Reply**' is selected as '**Draft Nature**'. Upon selecting '**New/Fresh**' the '**DAK/Letter'** sender details added as recipient details are removed.

8. Click **Add/Edit Recipients** to add recipients' details.

9. Click **Save** to save the draft.

Once the draft is saved, a unique number is generated and draft is added to the list of drafts in the receipt.

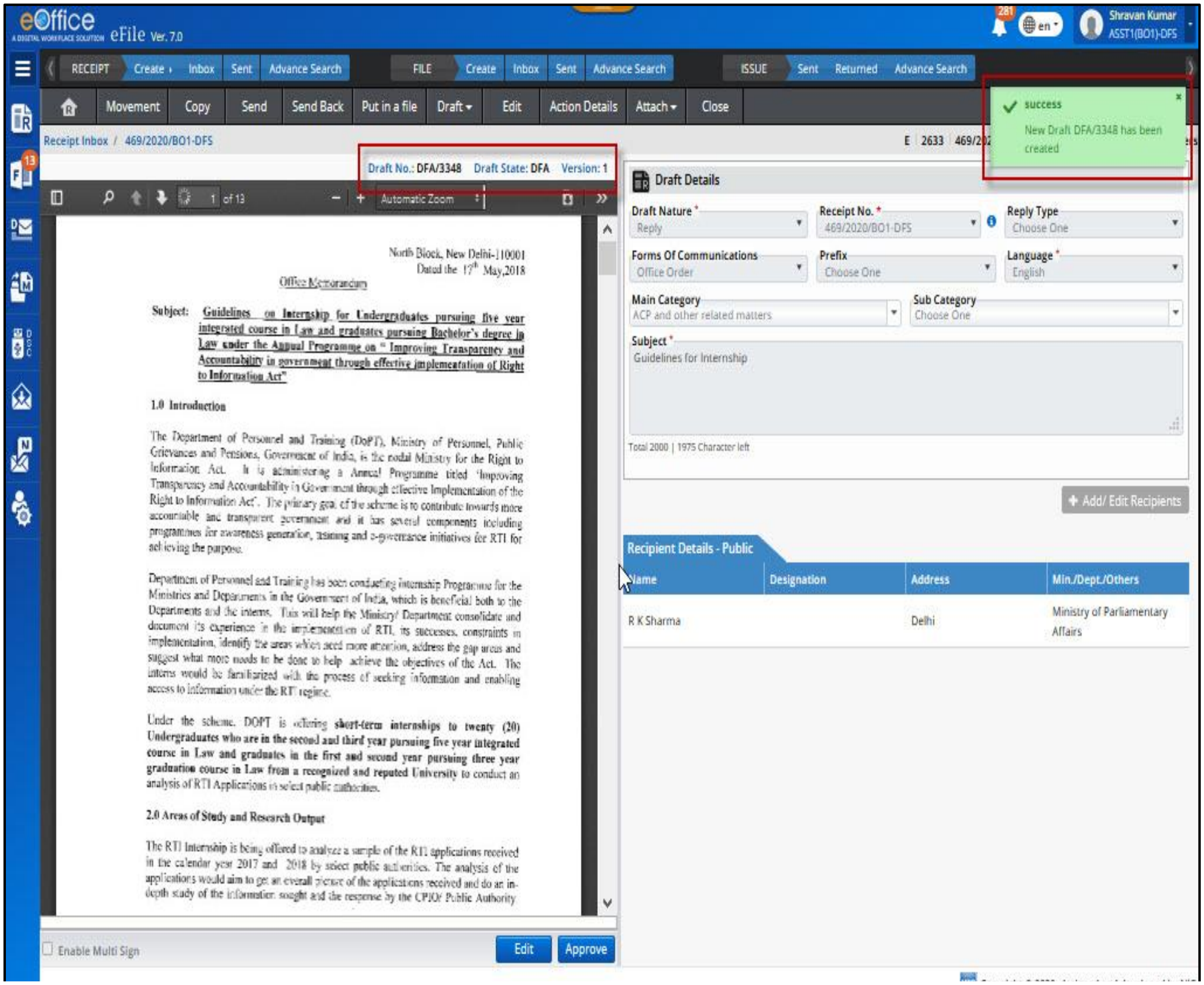


Figure 58

Note:

- The state of the draft created remains to be **'DFA' (Draft for Approval)** until it is approved.
- After creating the draft, a draft number is generated of following format – DFA/<sequence Number> where, DFA stands for Draft for Approval. And a running sequence number is allotted to it.

List of Drafts

It shows the list of already created drafts attached with the receipts which are created but not yet dispatched. This section describes the steps to view the list of drafts created.

STEPS TO FOLLOW:

1. Click opens an Electronic Receipt from **Created/Inbox/Inbox Sub-Folder** list of Receipts.

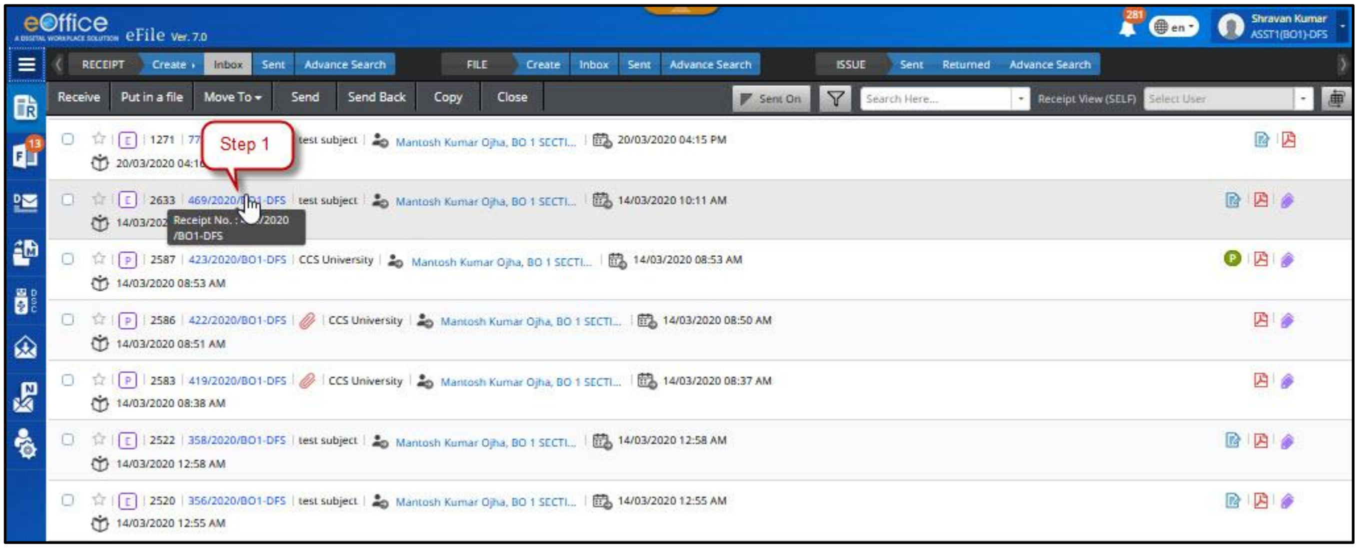


Figure 59

2. Click **Draft** in the menu bar and then Click **View Draft**.

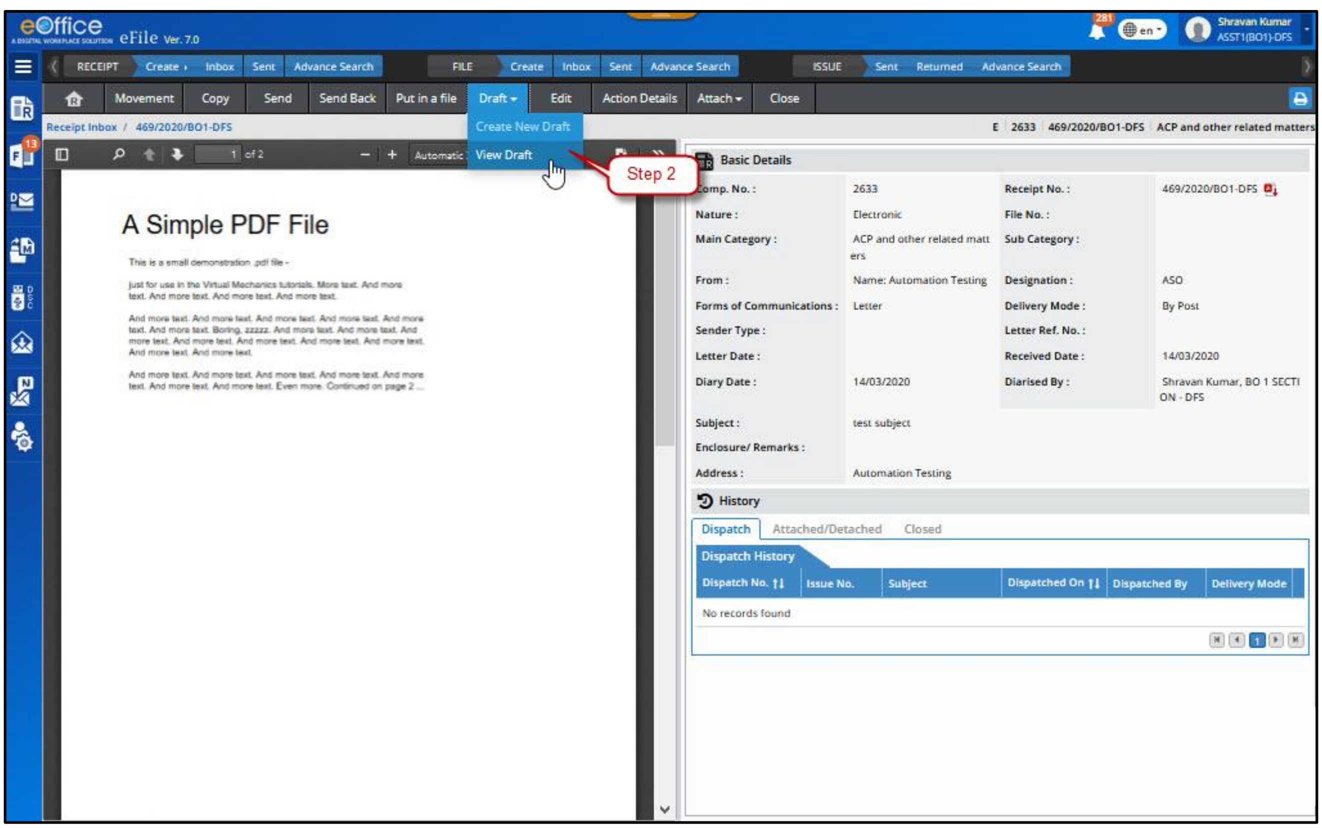
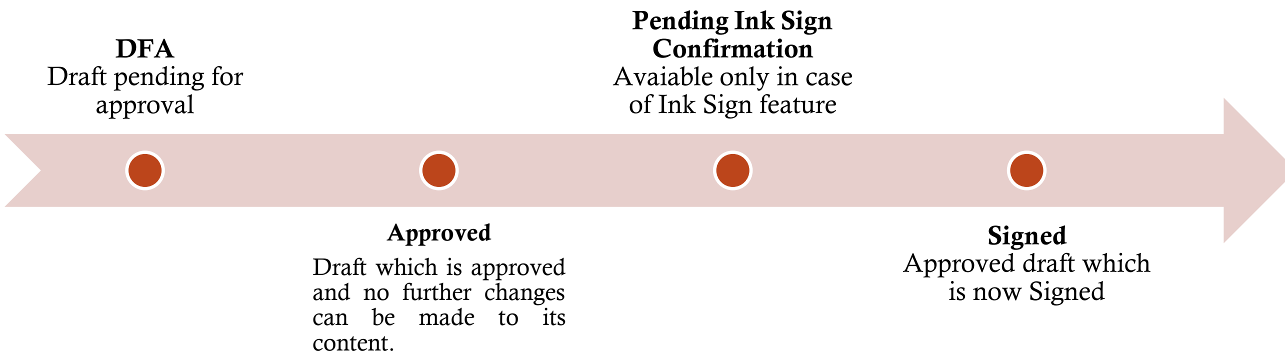


Figure 60

The following details can be seen from the **List of Drafts** –

1. **Draft Number** – The number of the draft generated when it was created. The format of the number is - DFA/<sequence number>.
2. **Subject** – The subject of the draft defined in draft details when it was prepared.
3. **Status** – The status of the drafts defines the stage at which the draft is existing. The various statuses/stages can be defined as –



4. **Approved By** – Name of the Approving authority who approved the DFA
5. **Last updated on** – The date on which it was last updated.
6. **Action** – A user can take following actions on the receipt, such as,
   a) **Versions –** It displays all versions of a draft created so far.
   b) **Delete –** This deletes the draft from the receipt's list of drafts.

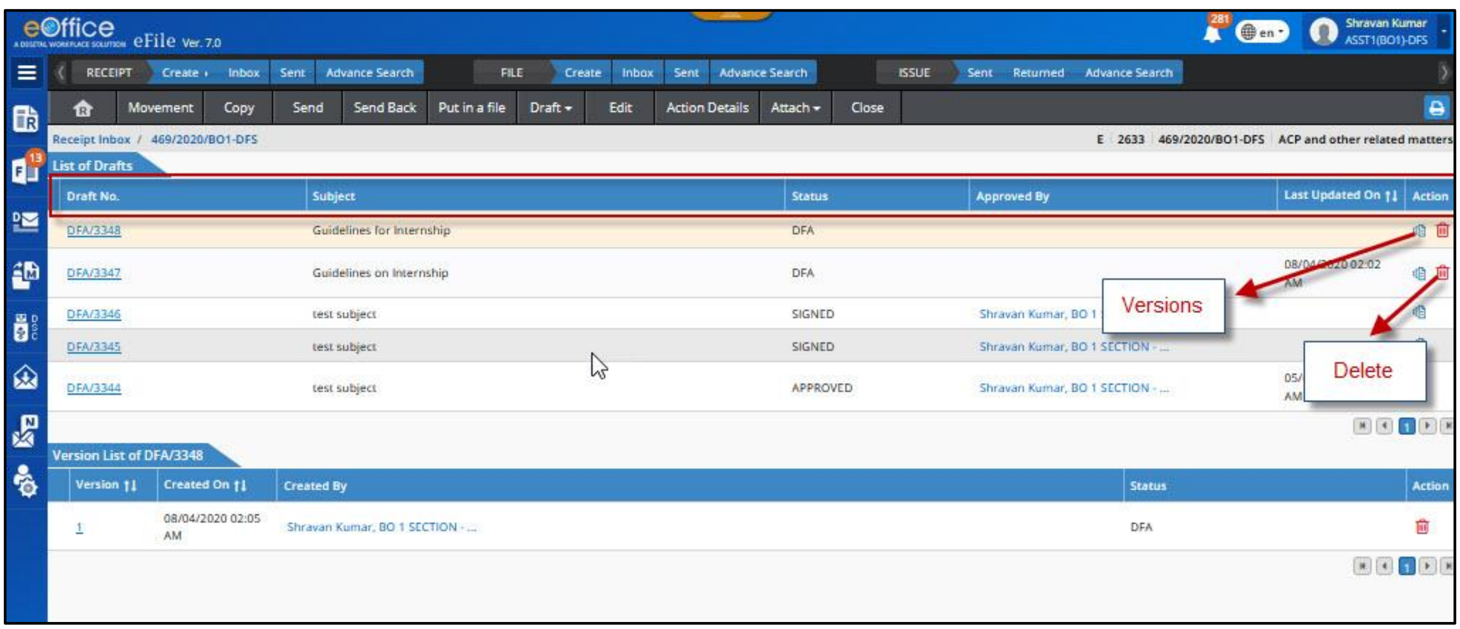


Figure 61

Note:

- List of Drafts can be sorted based on 'Last updated on'
- List of Drafts can be traversed through by clicking next page number.

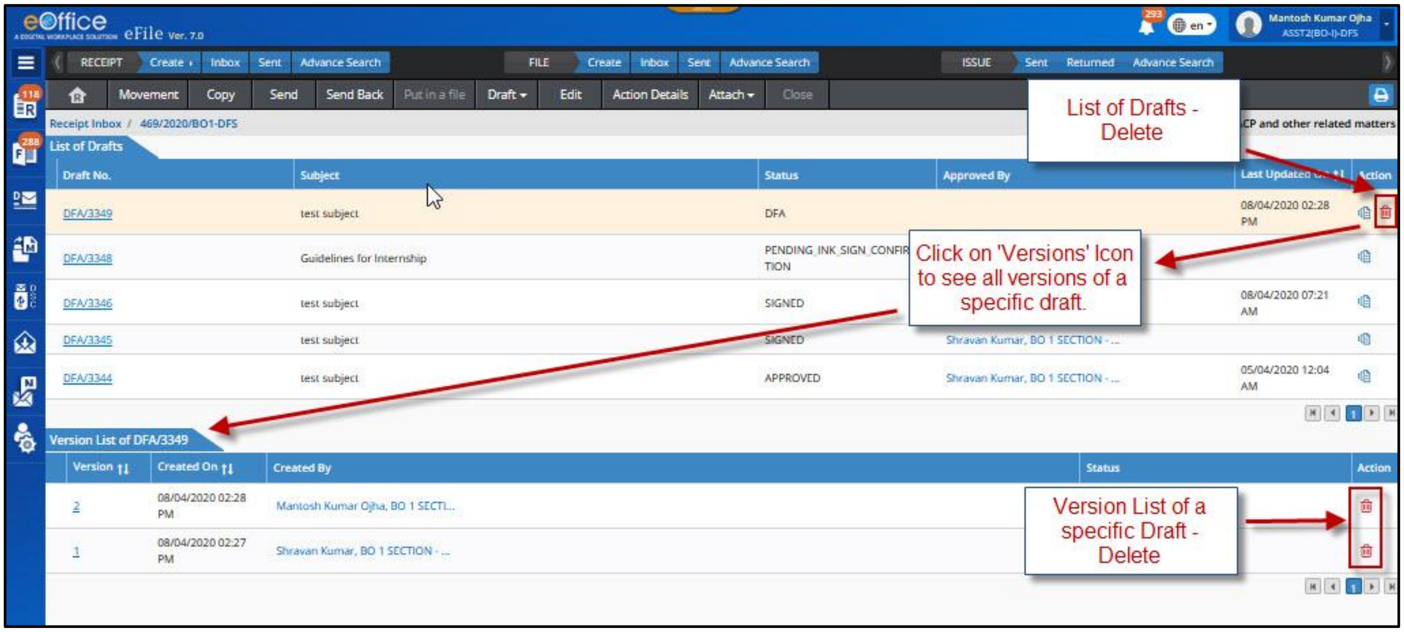


Figure 62

Various cases of 'Delete' Draft Explained –

1. <u>**Delete Option under List of drafts**</u> (*refer Figure 62*)

   a) **Receipt without further movement (Single Version)**: Clicking on Delete Icon in draft list will remove the Draft and its version.

   b) **Receipt with further movement (Single Version)**: Clicking on Delete Icon in draft list will change the Draft and its Version Status to **Deleted** and the Draft No. and Version Link will become 'Inactive'.

   c) **Receipt without further movement (Multiple Version):** This is the case, when the draft has more than one version and the last version is created by user and did not forward the receipt further. Clicking on 'Delete' Icon in for such draft will remove the latest created version and change the Draft and its other Versions Status to **Deleted** and Draft No. and Version Link should become 'Inactive'.

   d) **Receipt with further movement (Multiple Version):** This is the case, when the draft has more than one version and the last version was created by some other user. Clicking on 'Delete Icon' in draft list will change the Draft and its Version Status to **Deleted** and Draft No. and Version Link will become 'Inactive'.

2. <u>**Delete Option under Versions List of Draft**</u> (*refer Figure 59*)

   a) **Receipt without further movement (Single Version):** Clicking on Delete icon in version list of draft will remove version and draft associated with it.

   b) **Receipt without further movement (Multiple Version):** Clicking on **Delete** icon in version list, will remove latest version (if created by self) of draft.

Editing Draft in an Electronic Receipt

Draft in an Electronic Receipt can be edited till they get approved. Versions of Draft will be created to view the changes made by different users.

Important Points:

- ✓ Only drafts which are unapproved and in state of **DFA (Draft for Approval)**, can be edited. i.e. approved drafts cannot be edited/changed except the changes in recipient details or adding/removing a recipient.
- ✓ Draft content in the editor, Draft Details and Recipient Details get Auto Backed up if not saved by user.

STEPS TO FOLLOW:

1. Click opens an Electronic Receipt from **Created/Inbox/Inbox Sub-folder** list of Receipts.

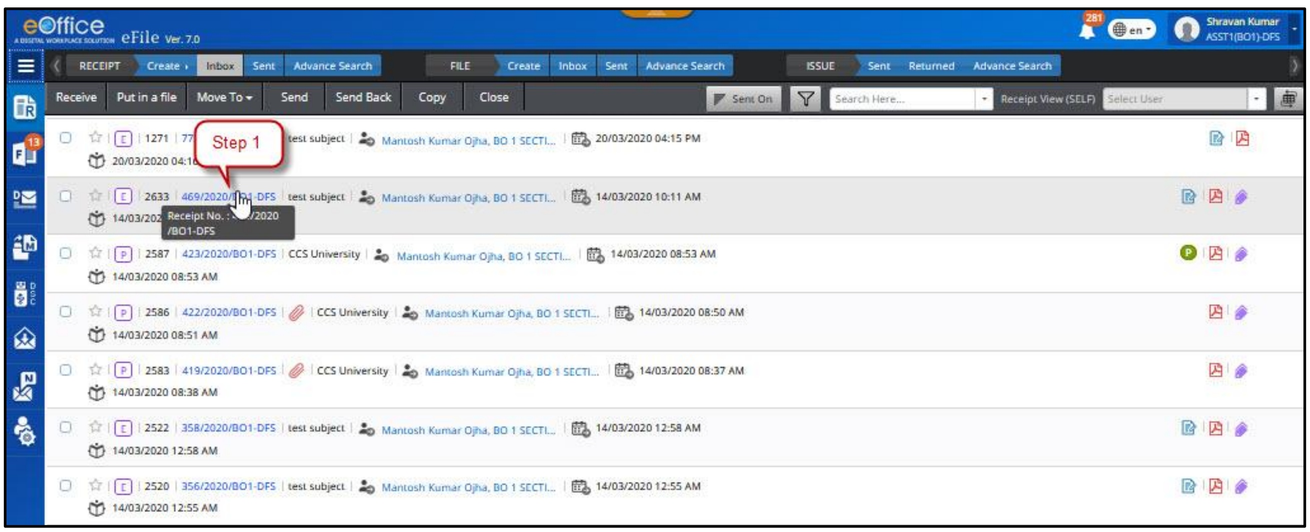


Figure 63

2. Click **Draft** in the menu bar and then Click **View Draft**.

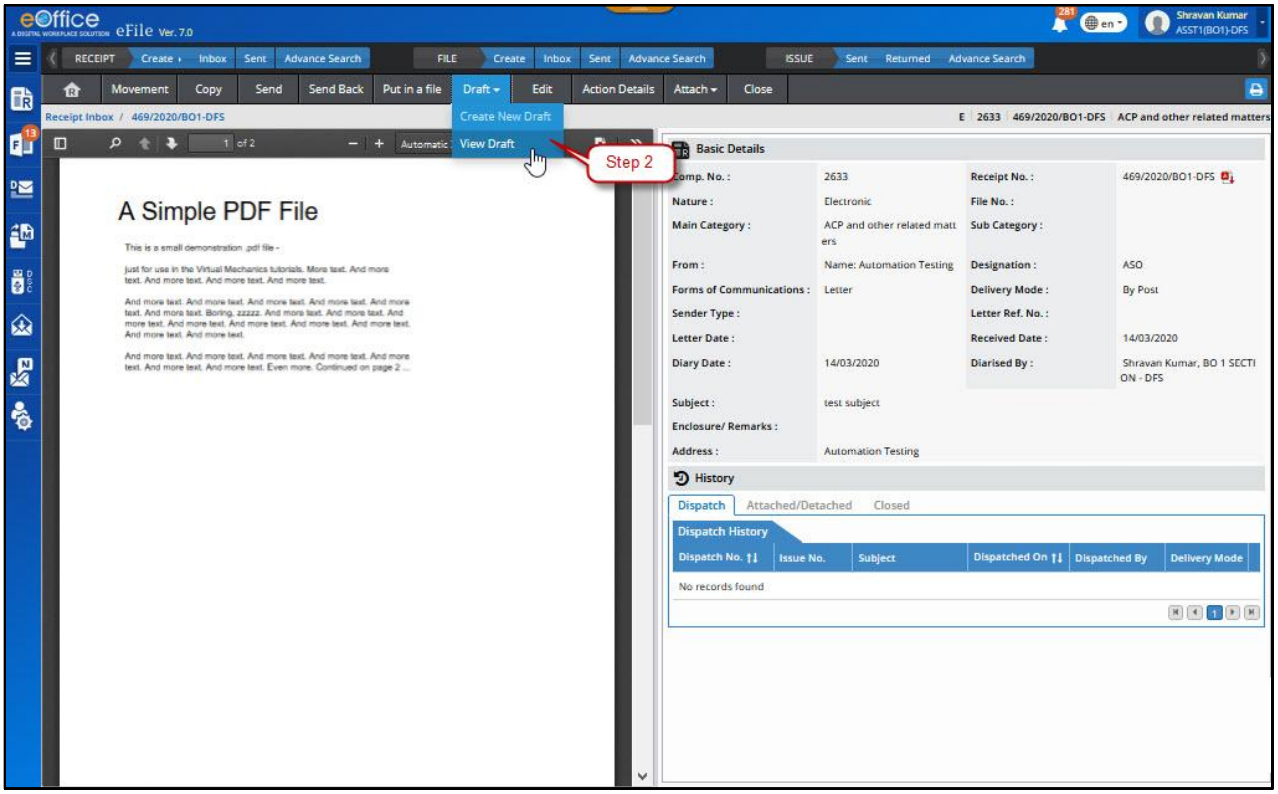


Figure 64

3. Click the draft no. from the **List of Drafts** to open.

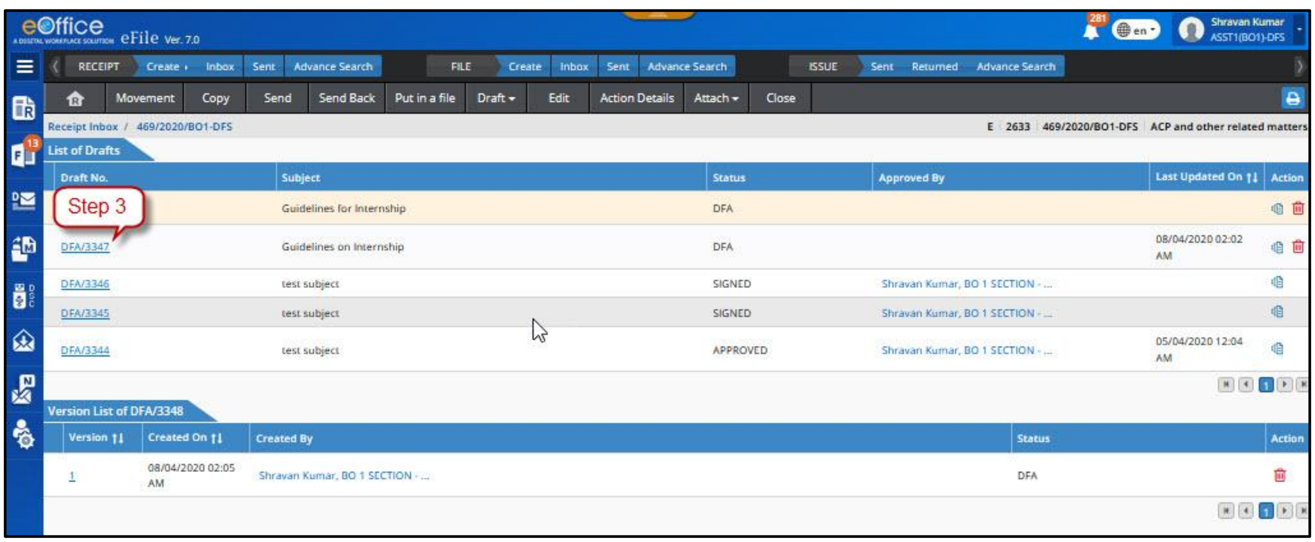


Figure 65

4. Click **Edit** Button.

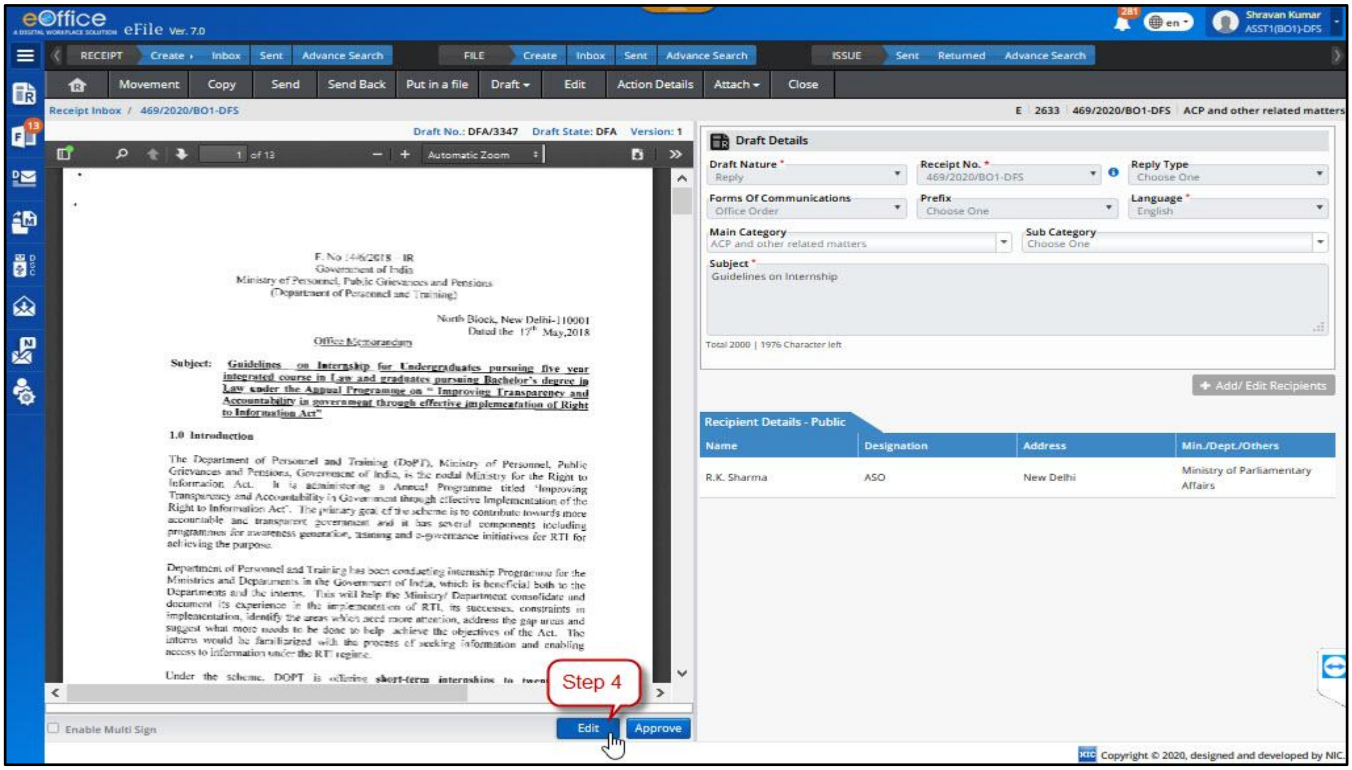


Figure 66

In case content is prepared using online text editor

5. Edit/Modify the content, as required.
(Option to type content, paste content and choose template is available)

Or

In case content is prepared using word processor (like MS Word) and uploaded

Click **Download** to download the original document, then make changes in the document and Click **Upload** to re-upload the edited document.

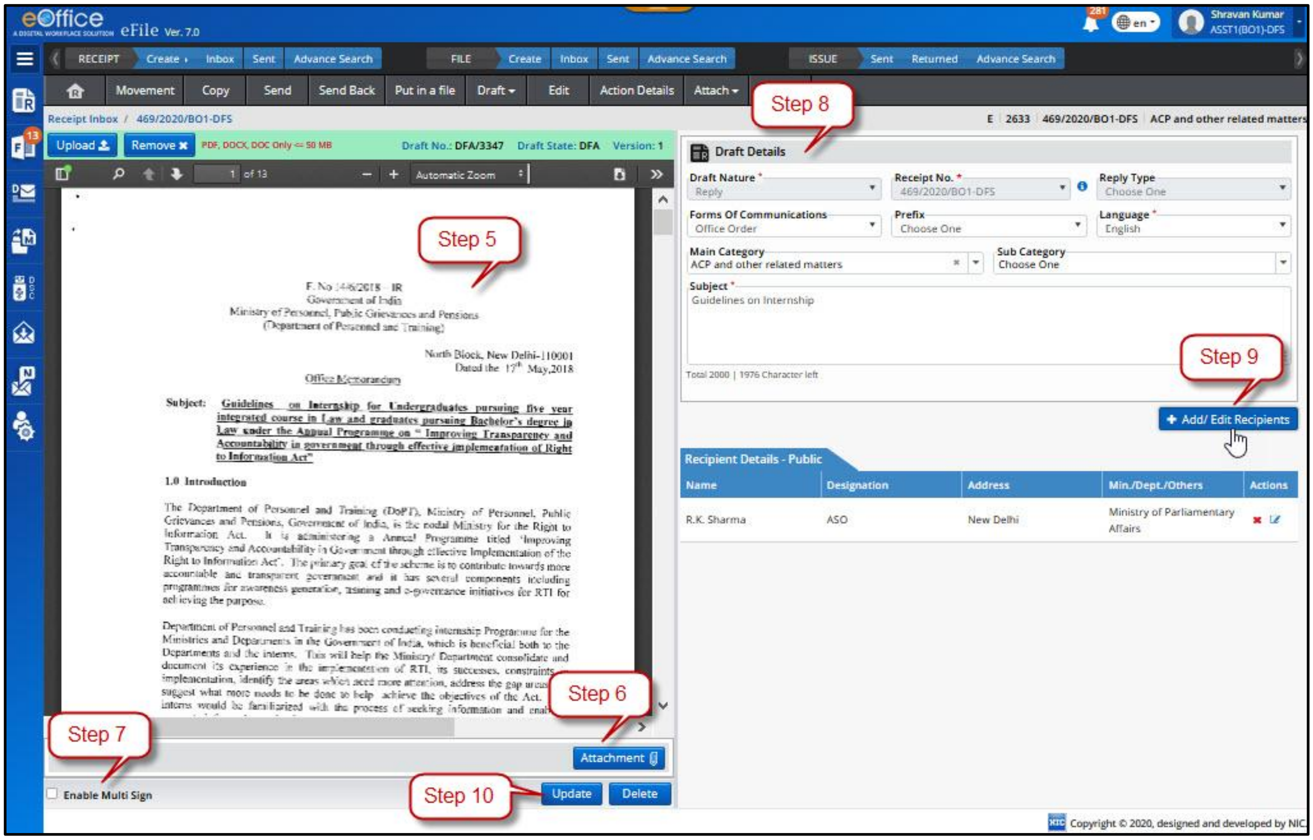


Figure 67

6. Add or remove **Attachment**. (*If required*)
7. Check/Uncheck **Enable Multi Sign** checkbox. *(If draft is required to be signed by multiple signing authority*)
8. Edit **Draft Details**. (*If required*)
9. Click **Remove** or **Edit** action buttons to remove or edit the recipient's details.

   Or

   Click **Add Recipients** to add or remove or edit recipient details.
10. Click **Update** to save the changes in the Draft.

Note:

- User will be able to edit and save draft metadata (excluding Draft nature, Receipt/Issue Number, Reply Type).
- Draft content, Draft Details and Recipient Details get Auto Saved if not saved by user.
- Text editor cannot be kept blank while editing an already saved draft.
- User will be able to remove or add attachment from Attachment list.
- New version of draft will be created subject to movement of File.
- User should be able view/edit any version of Draft until it is approved.

Add/Edit Recipient

This section describes the steps to add, edit and remove the recipient details in the creation of draft.

STEPS TO FOLLOW:

1. Click opens an **Electronic Receipt** from **Created/Inbox/Inbox Sub-Folder** list of Receipts.

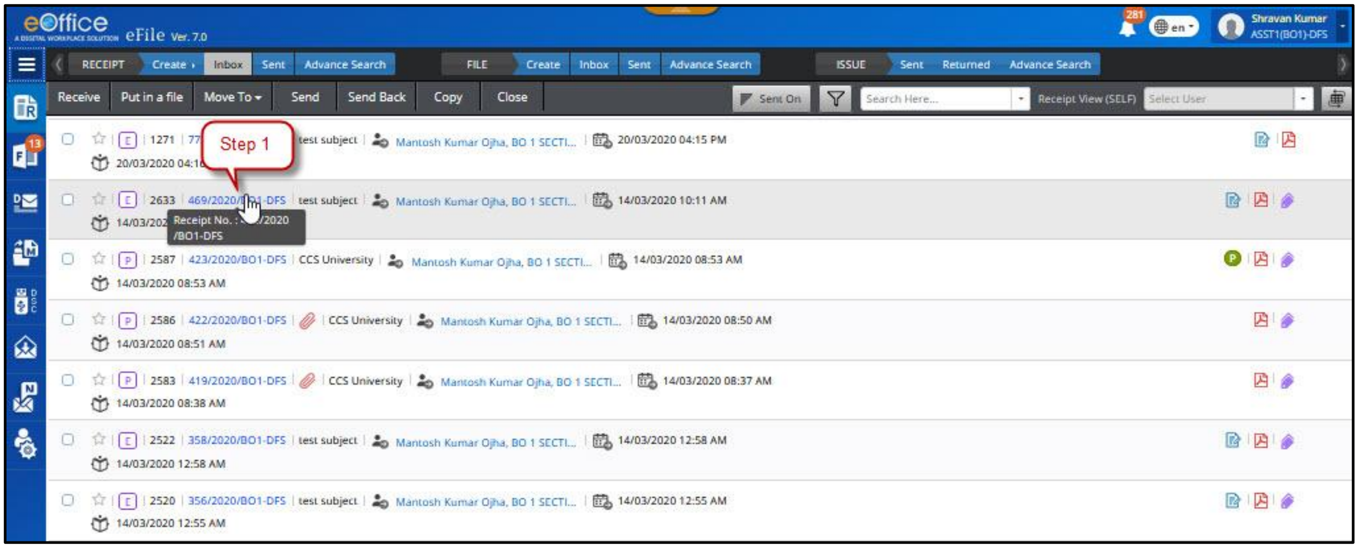


Figure 68

2. Click **Draft** in the menu bar and then Click **View Draft.**

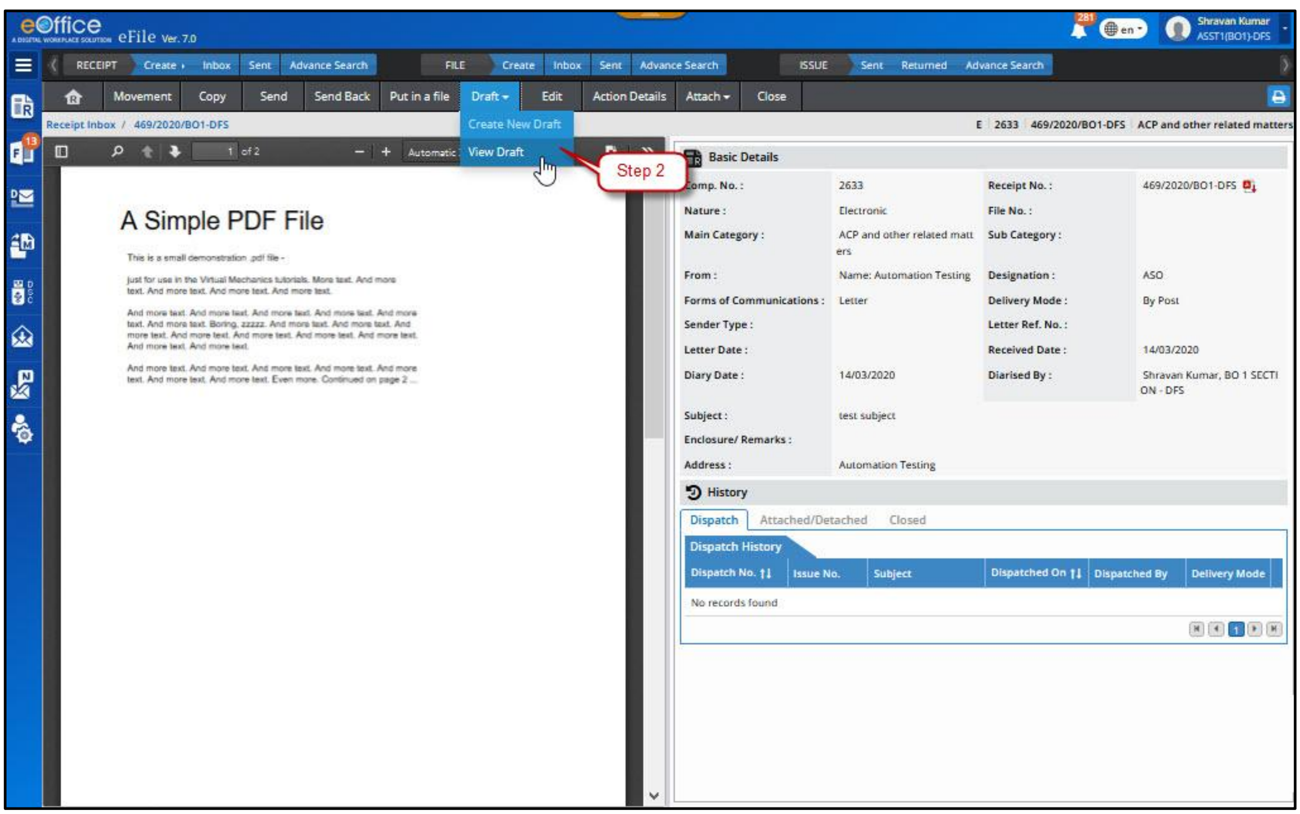


Figure 69

3. Click the draft no. from the **List of Drafts** to open as shown in Figure 70:

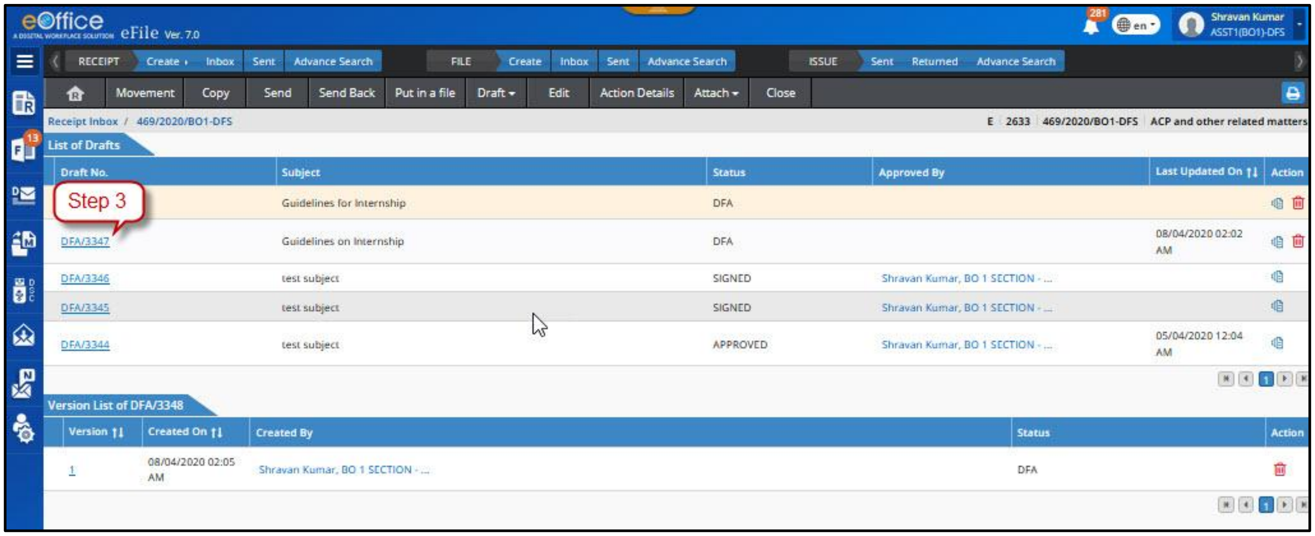


Figure 70

4. Click **Edit** as shown in Figure.71:

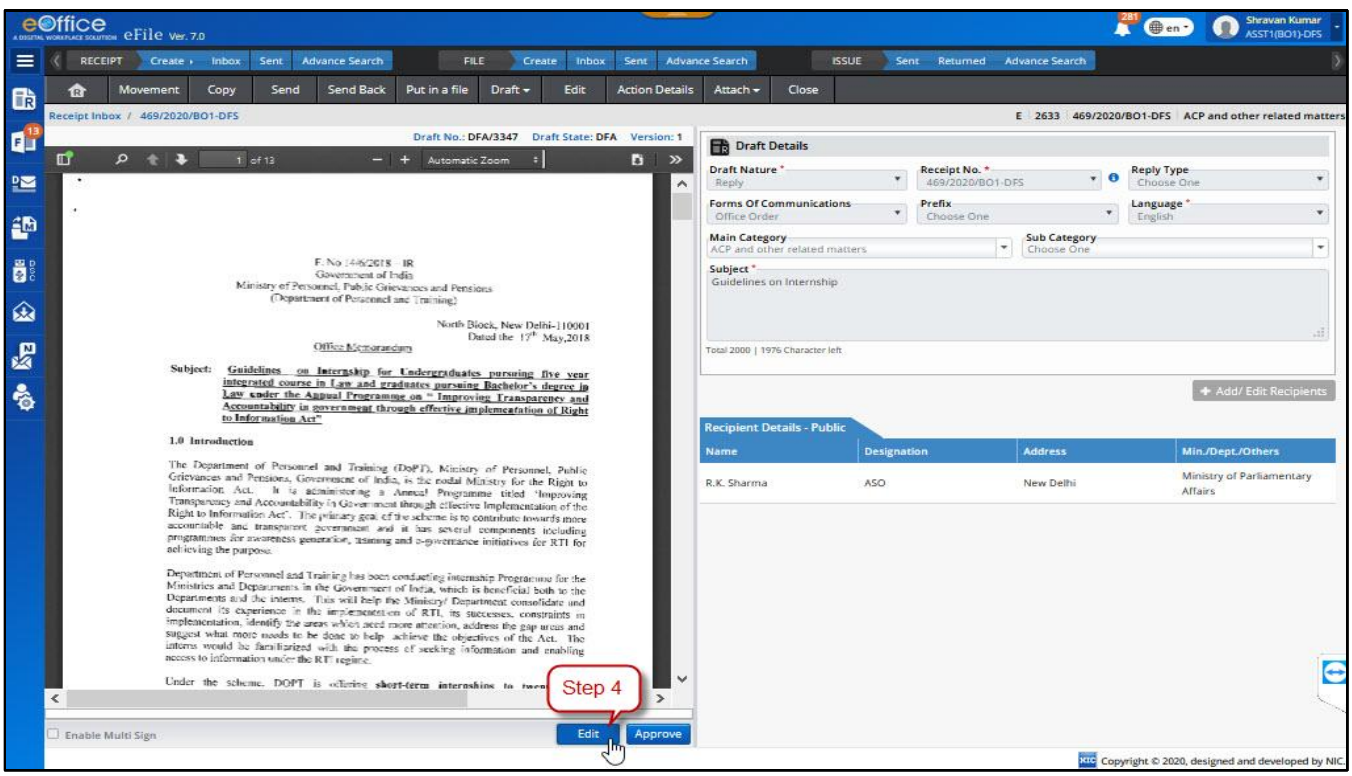


Figure 71

5. Click **Add/Edit Recipient** in Draft/Dispatch Page.

(**Note**: Already added recipient's details are already listed in right –panel of **'+ Add/Edit Recipient'** pop-up window with option to remove and edit)

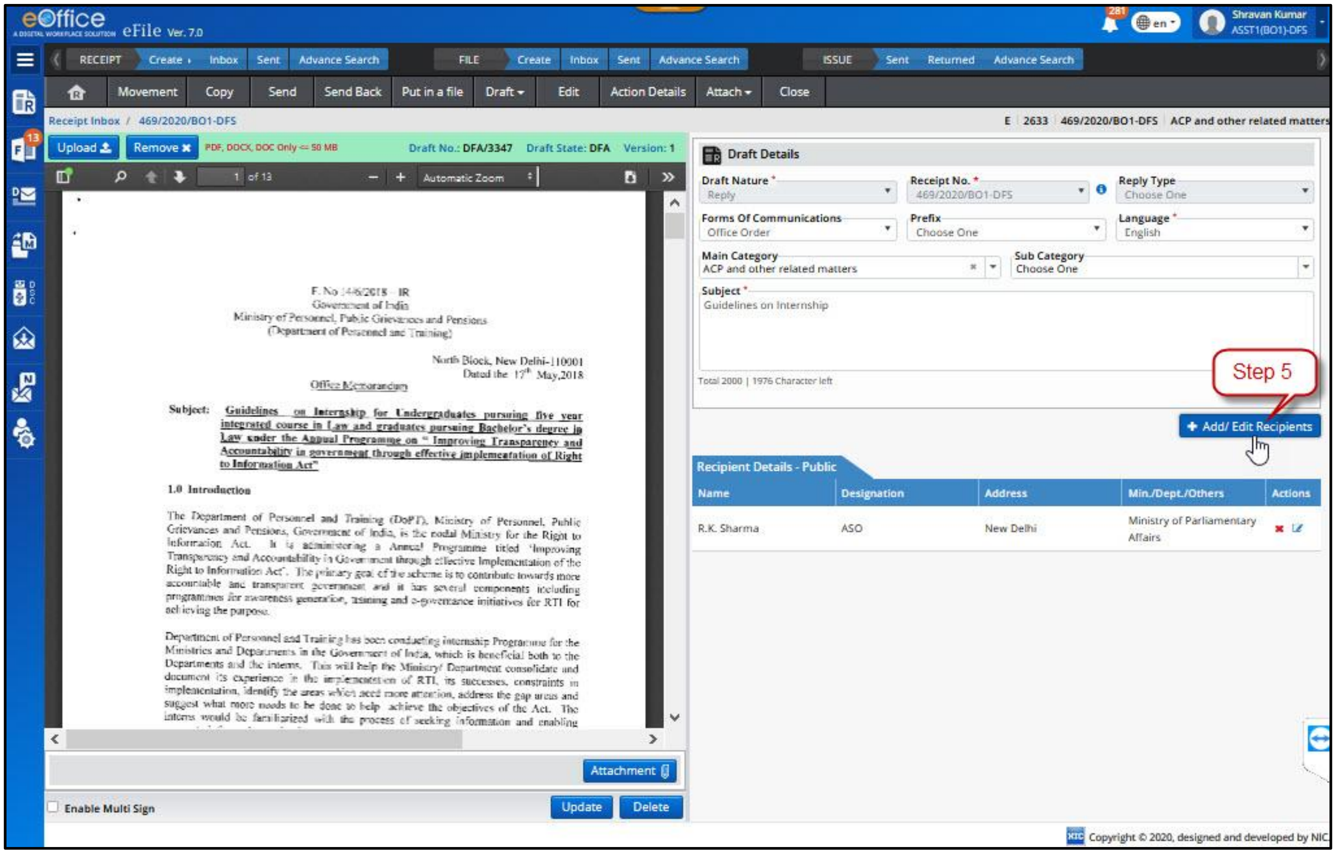


Figure 72

6. Fill all available details of recipient (including mandatory fields).

   (**Note**: Refer to section below the steps to know more details to add recipients under **'Public'**, **'Intra eOffice'** and **'Inter eOffice / Other Applications'**.)

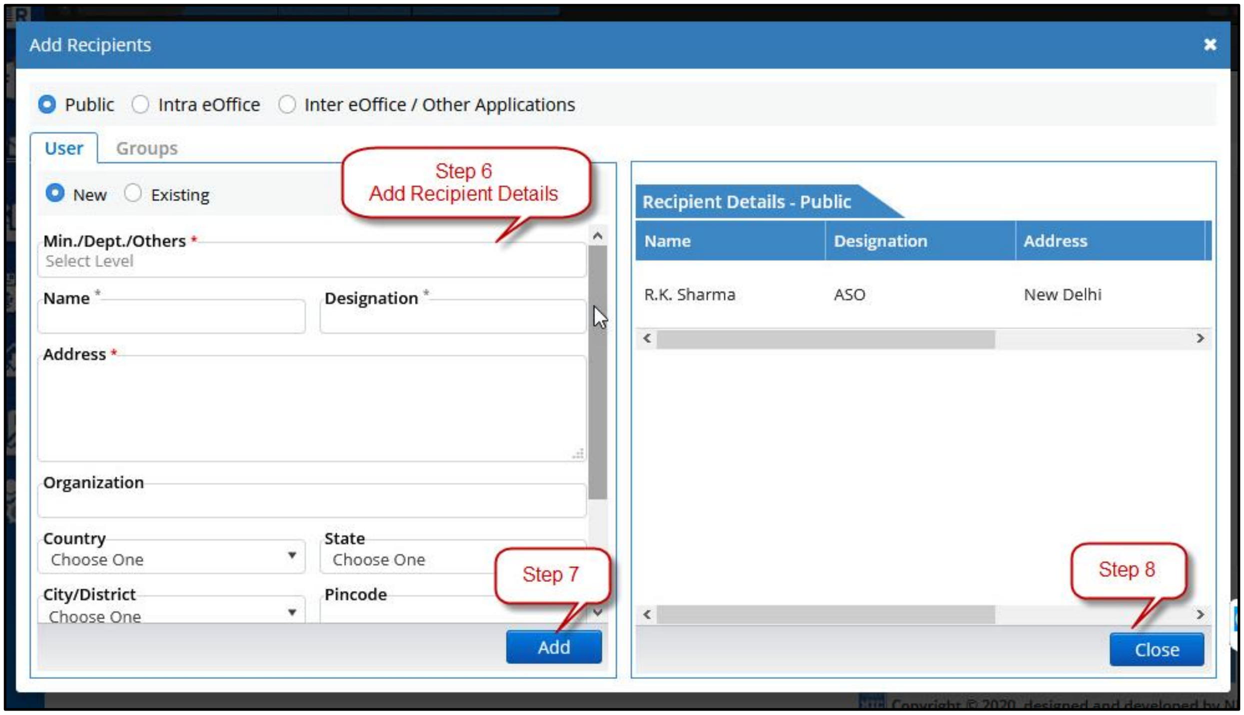


Figure 73

7. Click **Add.**

8. Click **Close** button in right panel.

Important Points:

- ✓ To add recipients under **'Intra eOffice'** and **'Inter eOffice instance'** are allowed only for electronic dispatch.
- ✓ Edit option to edit recipient details is available only for **'Public'** recipients and not available for recipients added under **'Intra eOffice'** and **'Inter eOffice'** instance.
- ✓ **'Remove'** option is available for all listed employees.

There are three domains from which recipients can be added. Let us see them all one by one,

a) **Public** (selected by default)
b) **Intra eOffice**
c) **Inter eOffice / Other Applications**

a) **Public** – This is the domain of people who are outside the organization for example citizens, people from other private organizations and officials of government bodies where eOffice to eOffice transactions are not taking place (also known as inter eOffice movement).The user details can be added under two tabs **'User'** and **'Groups'** –

User

Under this tab, recipient can be added by choosing **'New'** or **'Existing'**.

1. **'New'** allow you to add user's details in the fields below such as name, address, contact and etc. and then to further add into recipient list by clicking on **Add** at the bottom.

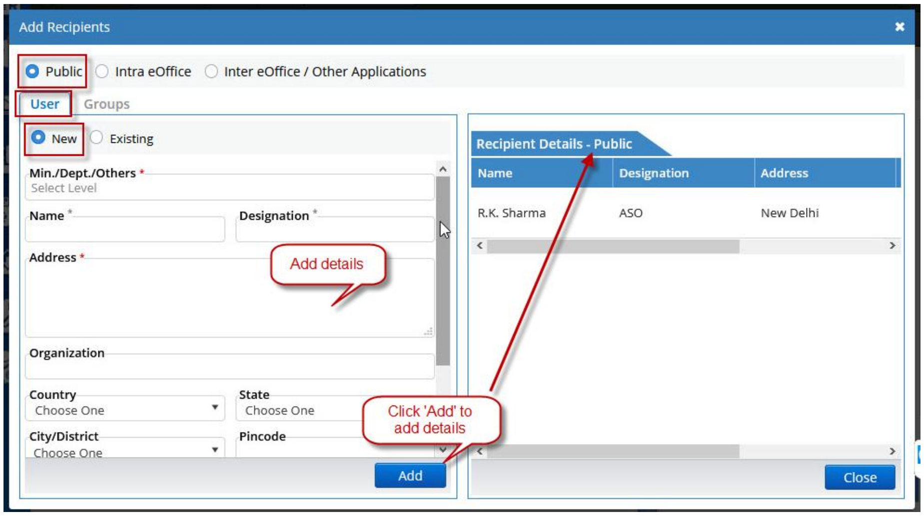


Figure 74

2. **'Existing'** allow adding users from the already maintained address books. There are four types of address books available **'Self'**, **'Section'**, **'Department'** and **'Instance'**.
3. Choose the address book by clicking on the down arrow in the **'Search Here'** box and then enter the recipient name in the search box.

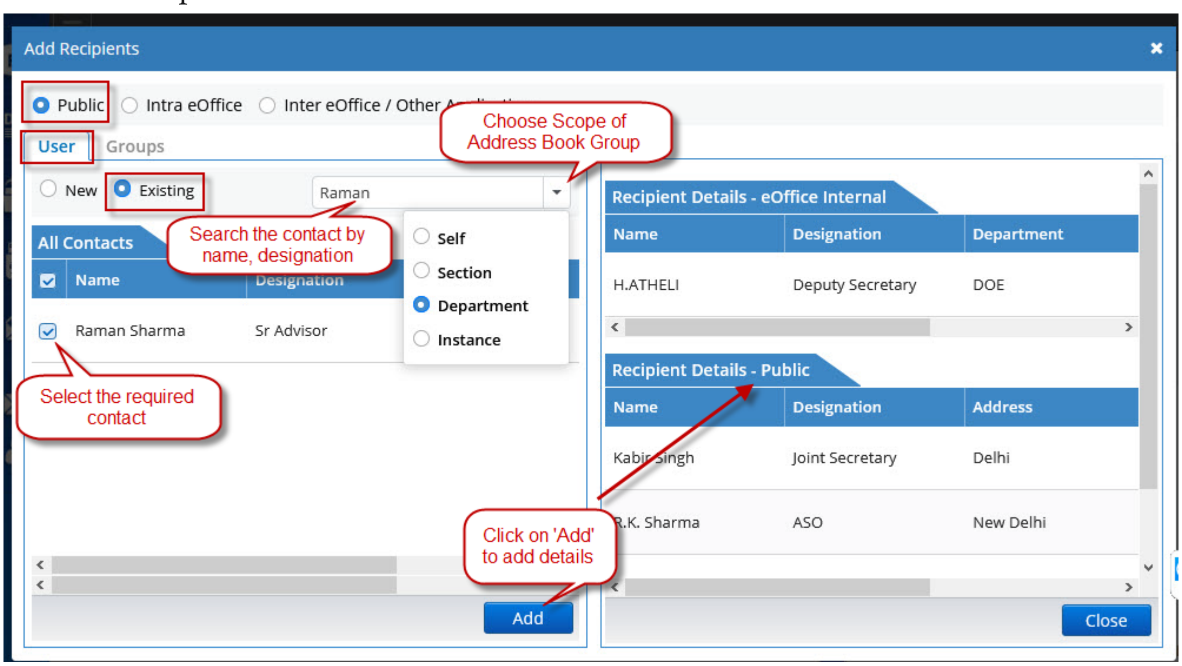


Figure 75

4. Based on the characters of recipient name entered in the search box, suggestion list will appear.
5. Choose the appropriate recipient(s) and then Click **Add**.

Groups

Under this tab, recipients can be added from already created groups.

1. In the first drop-down list, choose the **type/scope of the address book group** (**'Self', 'Section'**, **'Department'** and **'Instance'**) from which you wish to add recipient(s).

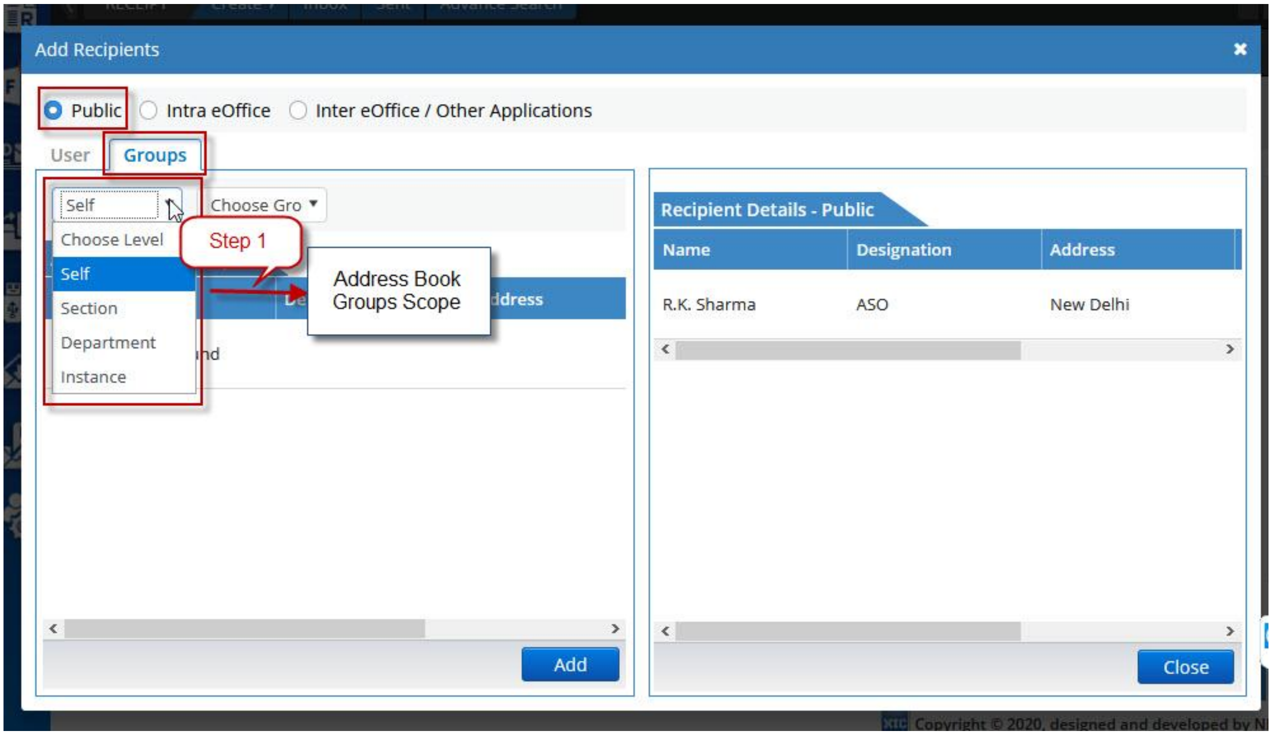


Figure 76

2. In the next drop-down, choose the **name of the group** from which you wish to add recipients.

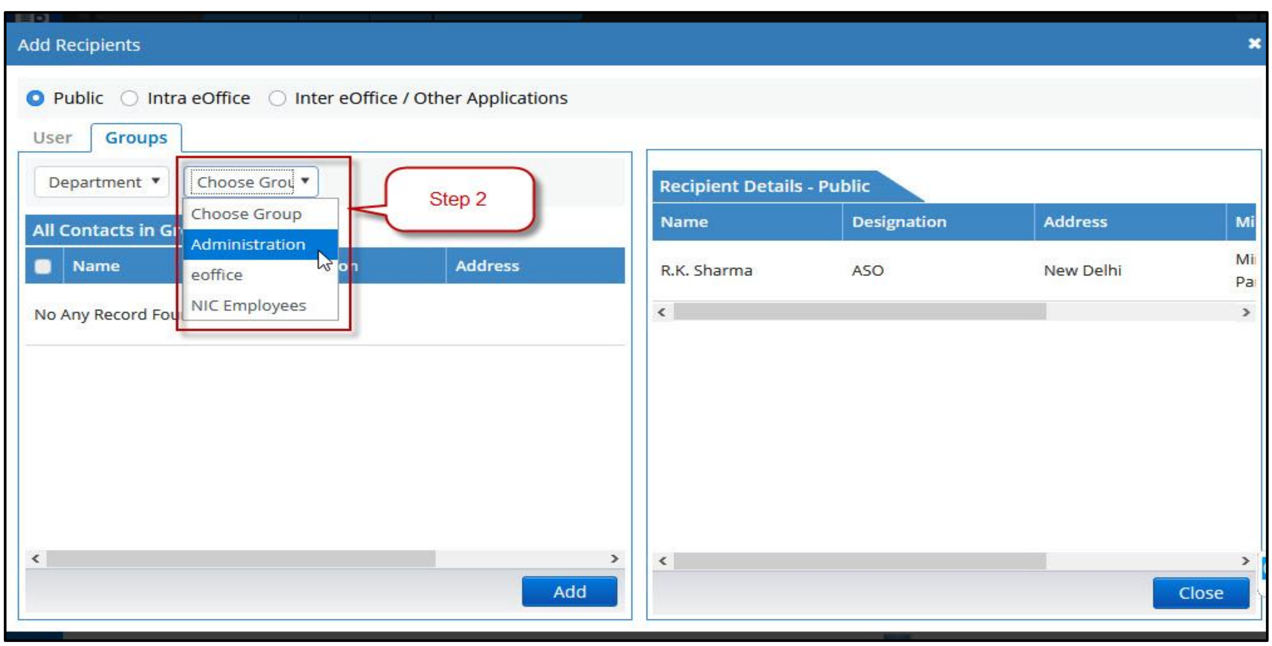


Figure 77

3. The list of contacts already added in the group will be listed below, under **'All Contacts under Group'** and select the recipients you wish to add as shown in Figure.78:

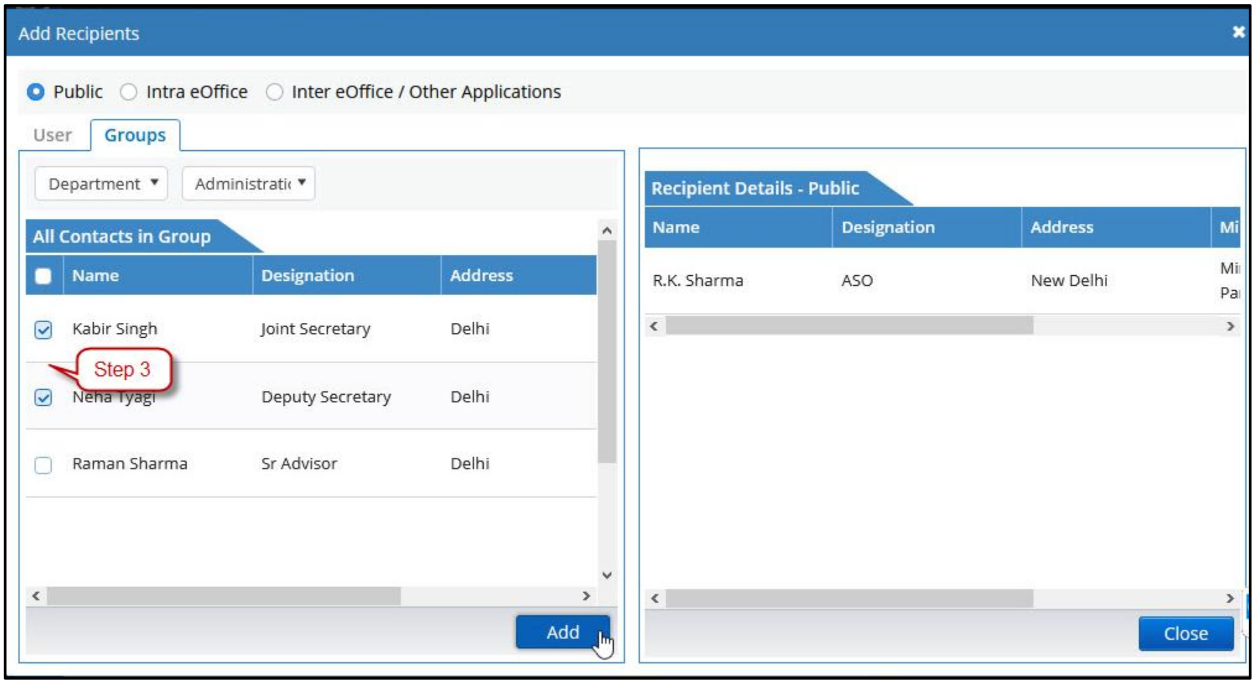


Figure 78

4. Click **Add** as shown in Figure.79:

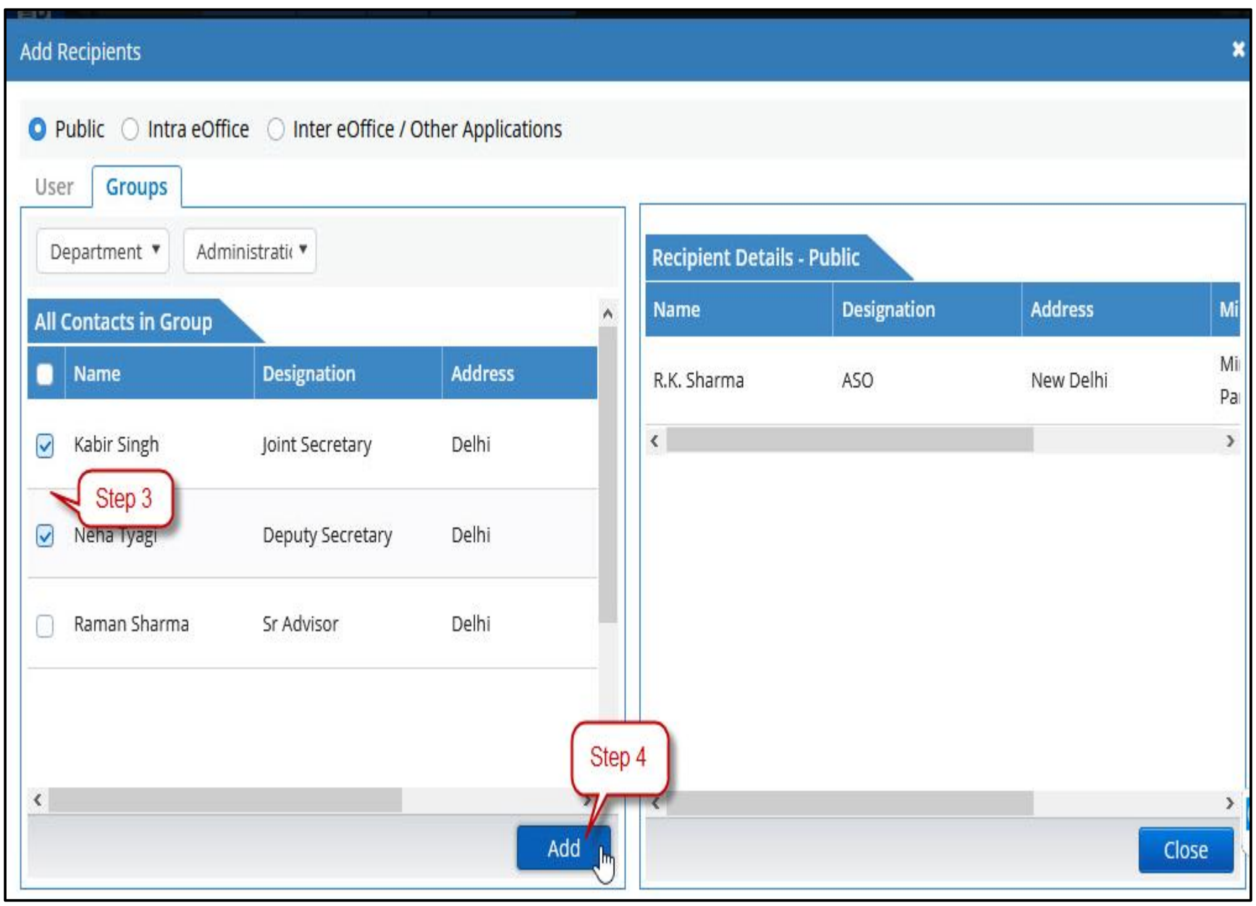


Figure 79

b) **Intra eOffice**– This is the domain of employees in user's own Ministry/Organization. This can be used to add recipients who are from one's own organization, for example, for issuing inter-office memo.

1. In the first drop-down menu, **choose the name of the department**, to which the intended employee/recipient belongs to.

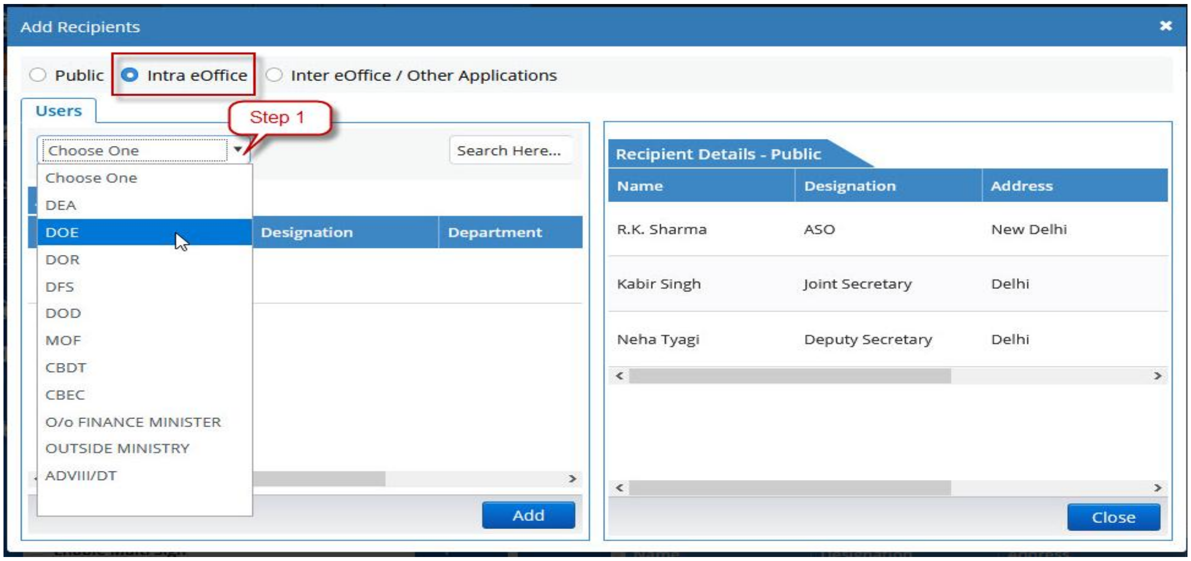


Figure 80

2. Enter the **recipient name** in the search box.
3. Based on the characters of recipient name entered in the search box, suggestion list will appear. Choose the appropriate recipient(s) as shown in Figure.81:

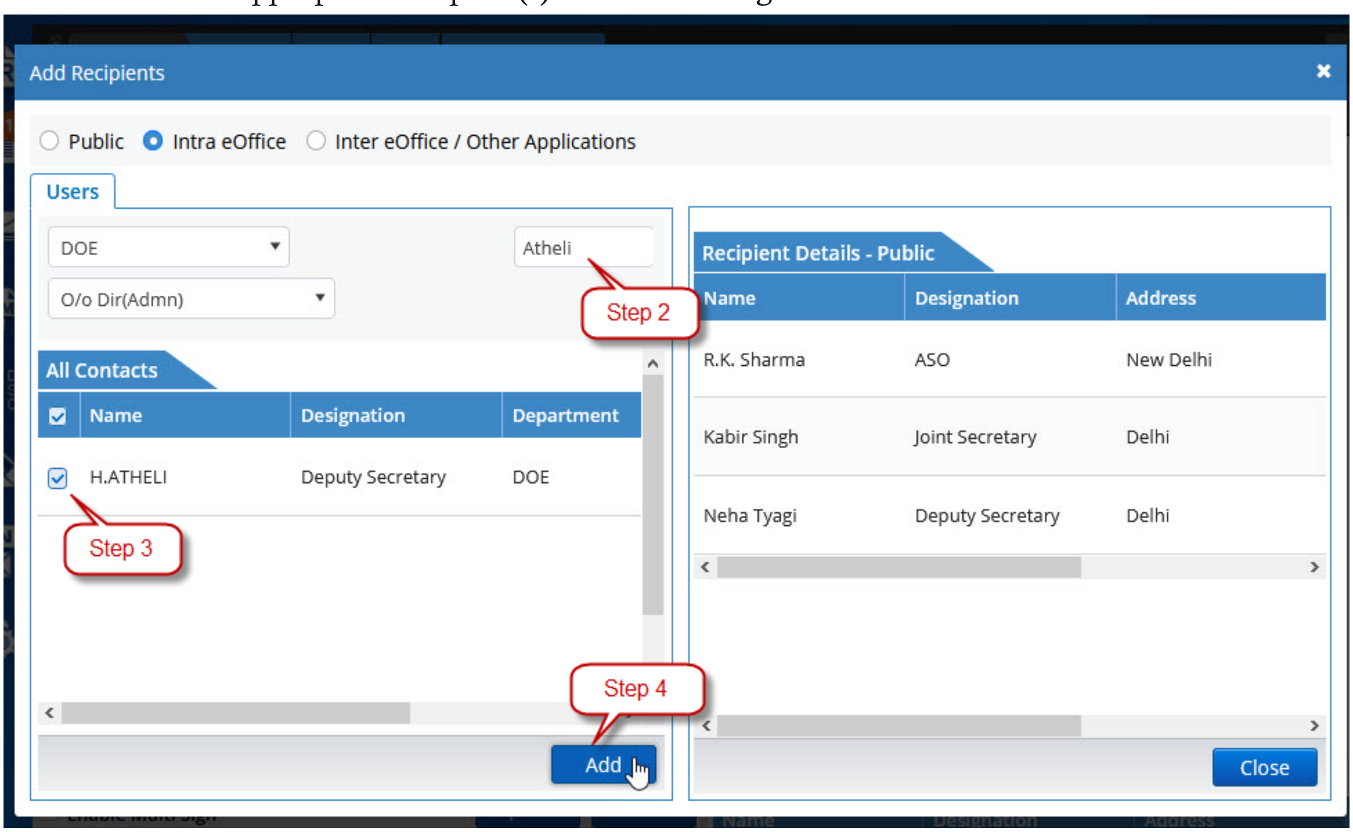


Figure 81

4. Click **'Add'** (Figure.81).As a result recipients will be added as shown in Figure.82:

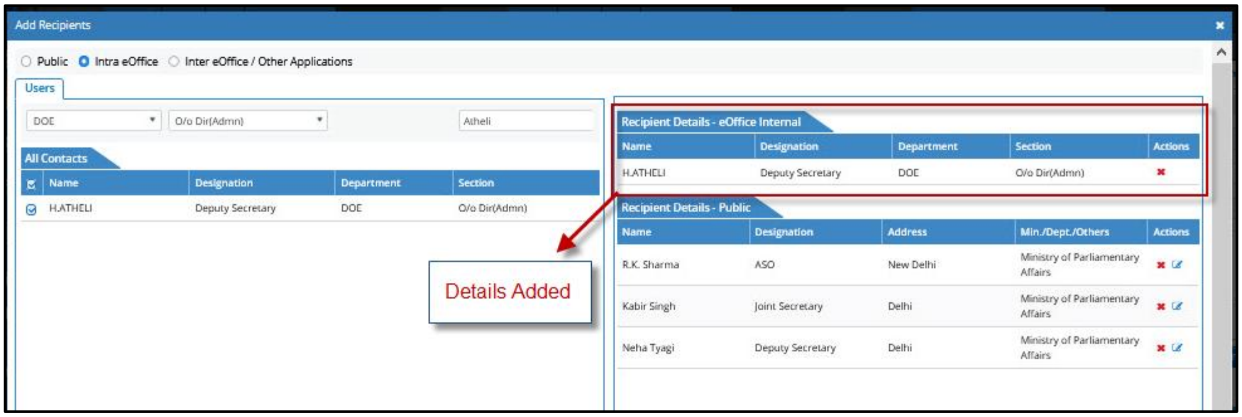


Figure 82

c) **Inter eOffice / Other Applications** –This is the domain of employees in other Ministry/Organization. It can be used to add recipients who are from other ministries/organizations, for example, issue a Govt. Order to other government bodies.

1. In the first drop-down menu, **choose the name of the ministry/organization**, to which the intended employee/recipient belongs to.
2. Enter the **recipient name** in the search box.
3. Based on the characters of recipient name entered in the search box, suggestion list will appear.
4. Choose the appropriate recipient(s) and then Click **'Add'** (Figure.82).

Approving Draft

This section describes steps to approve a draft.

Important Points:

- ✓ Draft content is not available for editing, once draft is approved.
- ✓ User will not be able to Check/Uncheck **'Enable Multi Sign'** on approved Draft.
- ✓ Removal or Adding of attachment is not possible after approval.
- ✓ Only Recipient details can be edited after approval. (Except in case the draft was created by user of other ministry/organization)
- ✓ User must have necessary privileges (**Role_Draft_Approver**) for approving the draft.

STEPS TO FOLLOW:

1. Click open a draft (DFA) from the **'List of Drafts'** as shown in Figure.83:

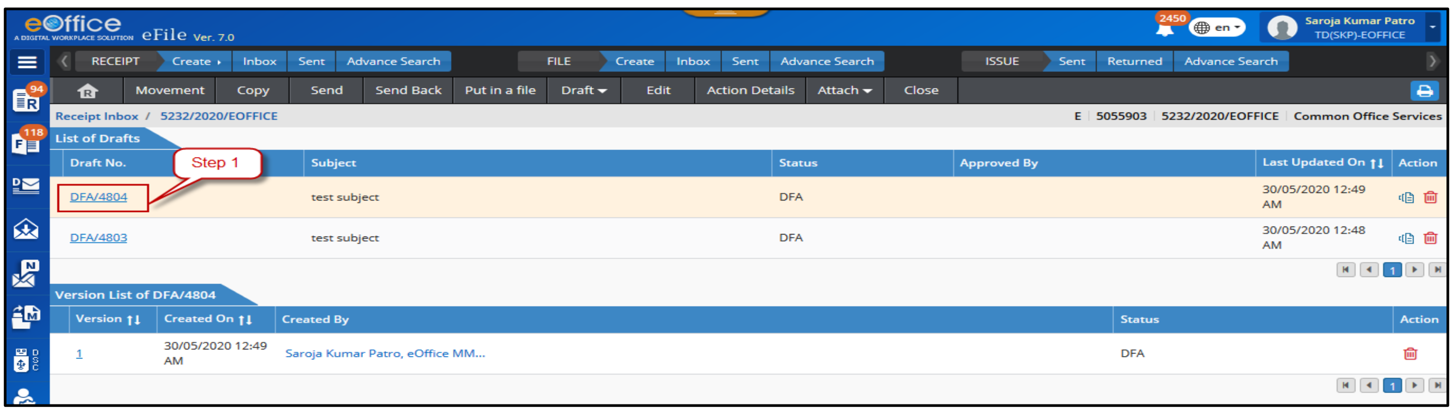


Figure 83

2. Click **Approve** as shown in Figure.84:

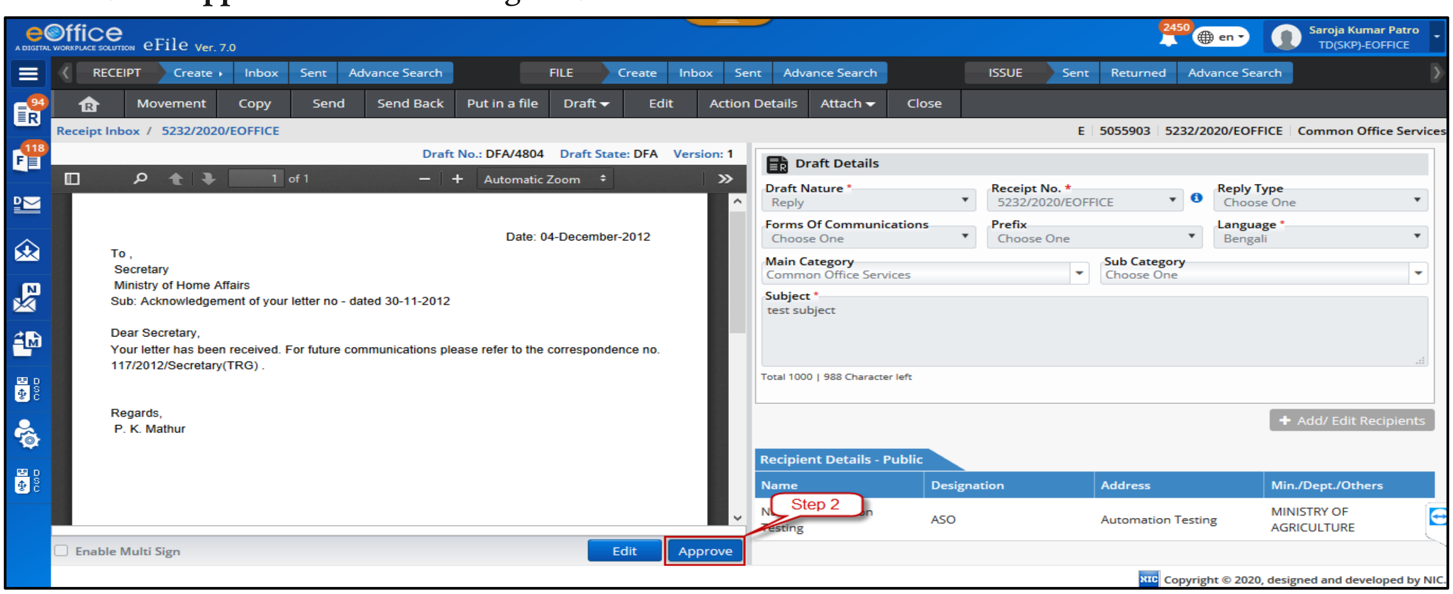


Figure 84

3. Click **‘Yes’** on approval confirmation pop-up box as shown in Figure.85:

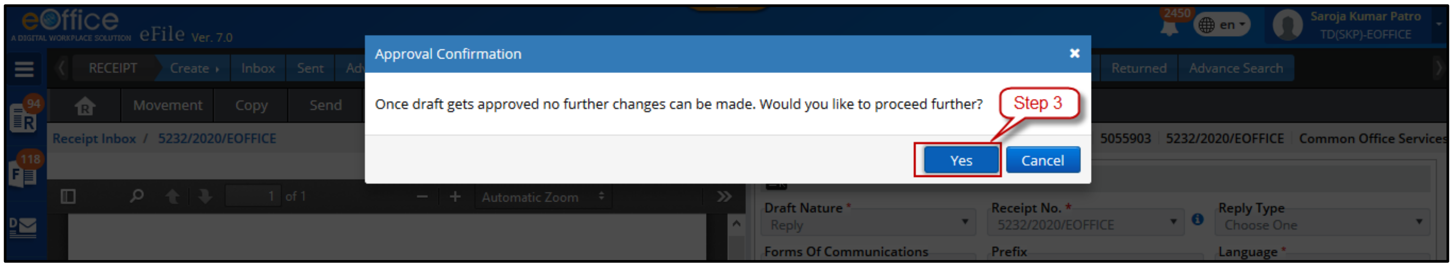


Figure 85

As soon as the draft is approved, an Issue number is assigned to it. It is the composite value of –

a) **I –** Denoting Issue
b) **<Sequence number>** – The continuous running sequence number from the series of dispatches
c) **<Year of Issue>** – The year of dispatch

Hence, Final dispatch number will be - **I/<sequence number>/<Year of Issue>**Example – I/218/2020

In case a prefix was chosen, such as for Government Order (GO) form of communication, then the Issue number is called as the GO number (also used in #Document number). It is the composite value of –

<GO Prefix Code>–GO denoting government order and its prefix code, such as **GO RT** or **GO Ms**

<Sequence Number>–The continuous running sequence number

<Year>–The year of creation

<Department> –The name of the department from which it is issued from. Hence, <GO Prefix Code>/<sequence number>/<Year>/<Department>For example, GO RT/25/2020/ADMIN DEPT

Note:

- After approving, the status of the DRAFT will change to ‘**Approved**’.

Signing Draft

The use section describes the digital signing process of an approved draft.

Important Points:

✓ Only Approved drafts in the Drafts List can be digitally signed.

✓ Drafts along with receipts received from other Ministries and organizations cannot be digitally signed.

✓ **Multi Sign** – A draft can be signed multiple times if **‘Enable Multi Sign’** is checked.

✓ A draft enabled with Multi Sign feature cannot be Ink signed.

DSC SIGN

This feature allows user to digitally sign an Approved Draft Using DSC Token.

Important Points:

- ✓ JRE Version 1.8 or above appropriate as per OS must be installed in the client machine.
- ✓ DSC Signer Service must be installed in the client machine.
- ✓ User must have valid DSC certificates installed in the computer.
- ✓ User must be registered with DSC and DSC should be plugged in the client system.
- ✓ Compatible DSC installer should be present in computer.

STEPS TO FOLLOW:

1. Click opens an Approved **draft** from the **'List of Drafts'** as shown in Figure.86:

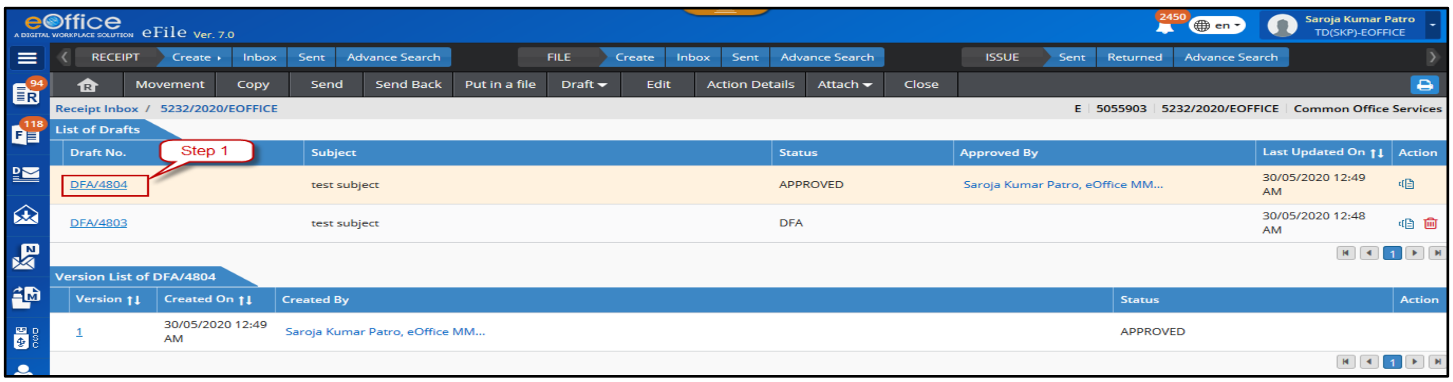


Figure 86

2. Click **'DSC Sign'** button as shown in Figure.87:

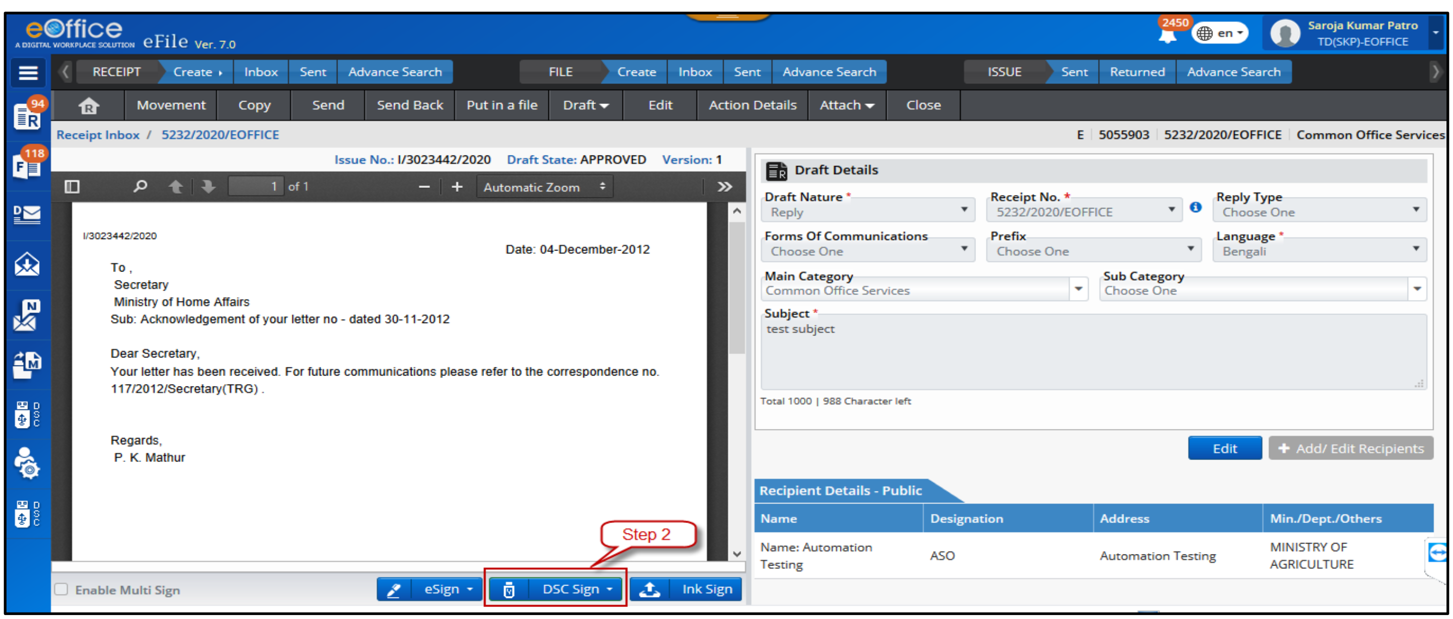


Figure 87

To Sign at default location

3. Click **'Default'** as shown in Figure.88:

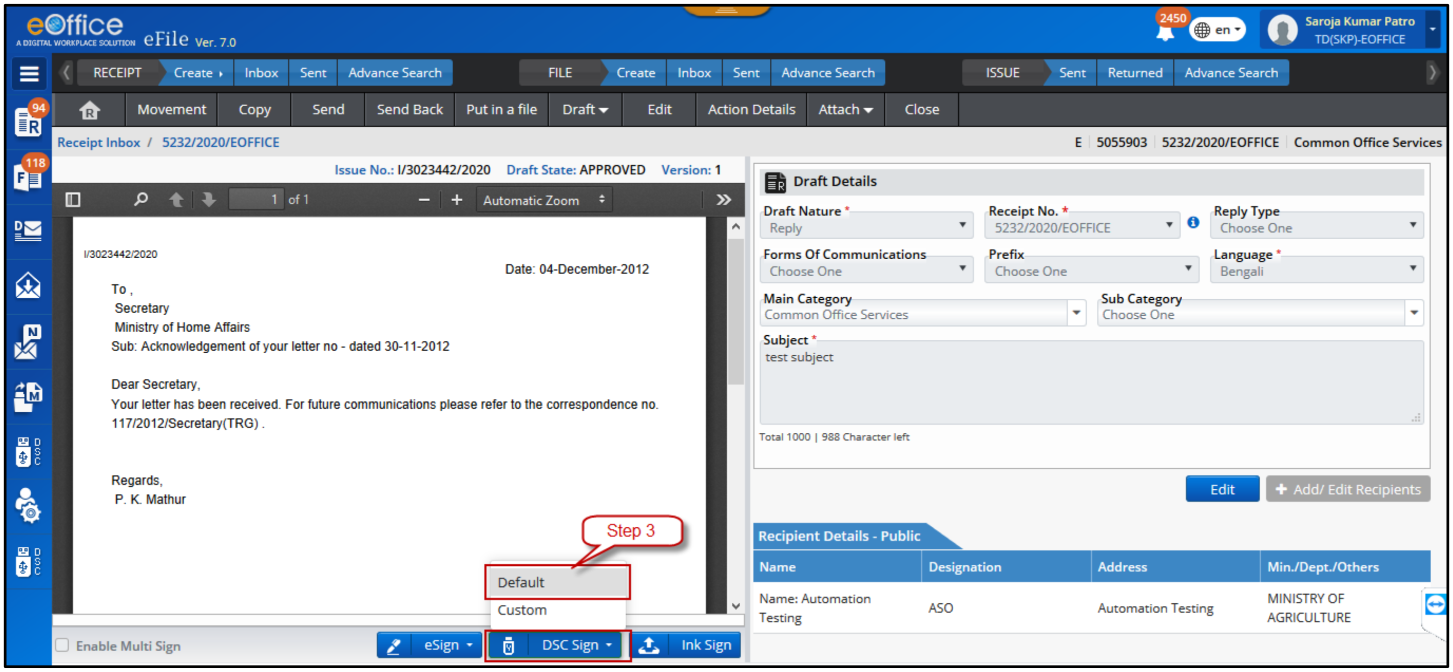


Figure 88

4. Enter the **PIN** for **DSC**.
5. Click **'OK'** to DSC sign the approved draft.

To Sign at the location of your choice

3. Click **'Custom'** as shown in Figure.89:

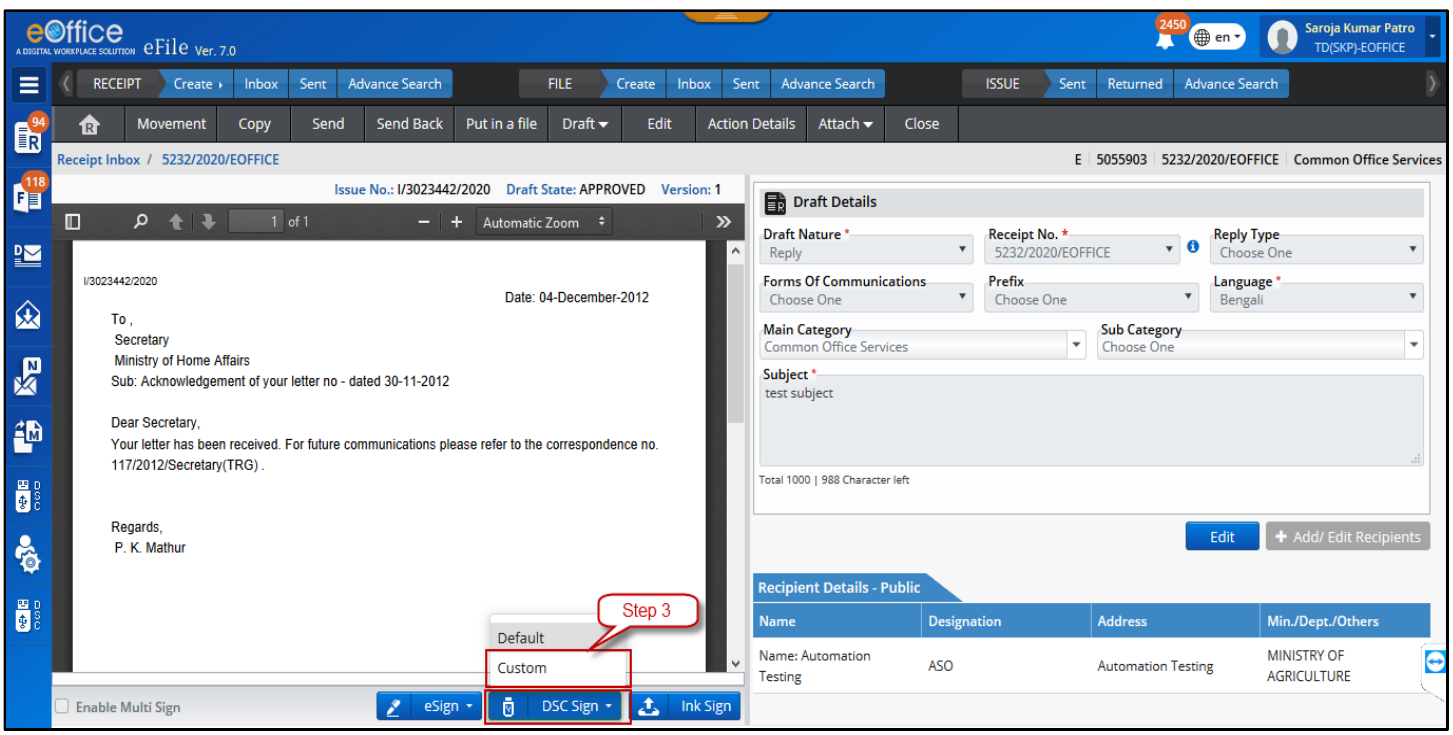


Figure 89

4. In the Custom Sign pop up window, select signing area by dragging left click using mouse pointer.

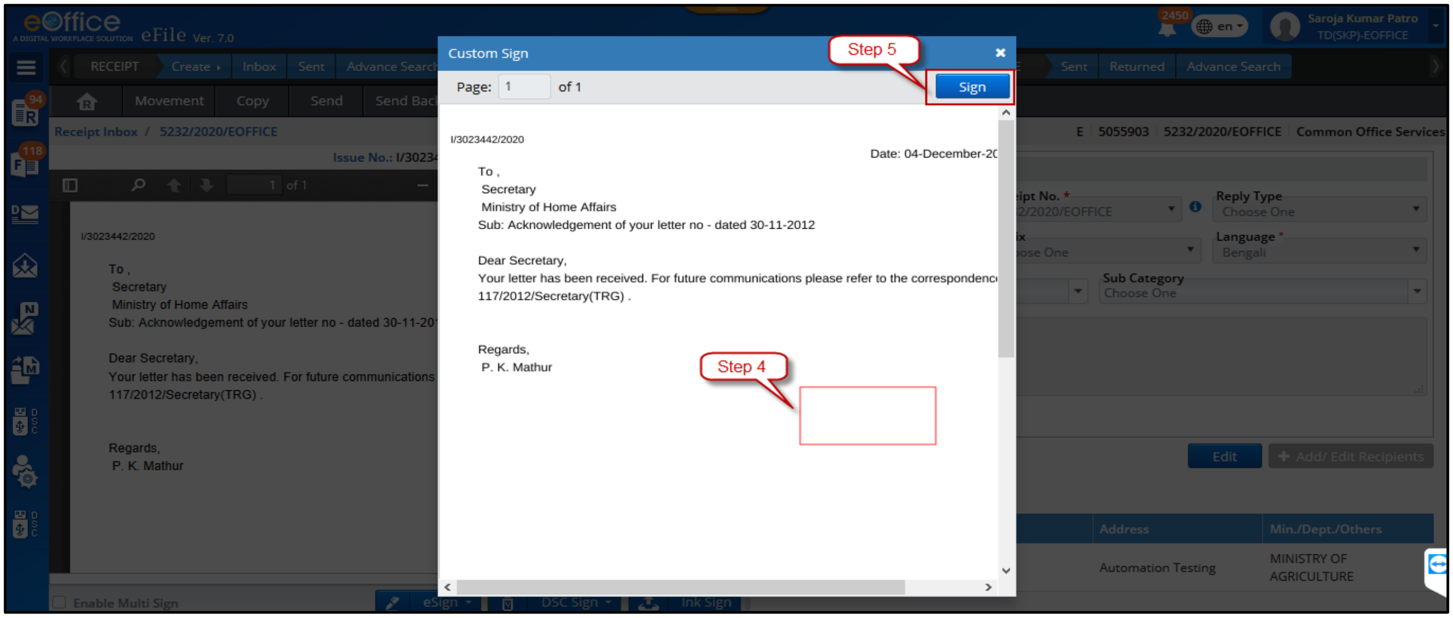


Figure 90

5. Click **'Sign'** in Custom Sign pop-up window.
6. Enter **PIN** for **DSC**.
7. Click **'OK'** to DSC sign the approved draft.

Note:

- Draft status should change to **Signed**.
- User shall be able to view Digital Signature(s) on signature panel of signed draft.
- Option of **'Edit'** (Recipient Detail) and to **'Dispatch'** will be available.
- DSC details (user's name, DSC token name, date and time stamp of signing) will be embossed on the Approved DFA content at the bottom left of the document or at desired location in case of custom sign.

eSign

This feature allows user to digitally sign Draft using eHastakshar/eSign (Aadhaar based using OTP or Fingerprint).

Important Points:

- ✓ eSign Web service should be up and running.
- ✓ Web service URL should available in eFile application configuration table.
- ✓ User should have Aadhaar authenticated mobile number (For OTP based eSign) listed in the EMD.
- ✓ User should have Biometric Device (For Fingerprint/IRIS based eSign) connected to system.
- ✓ License Agreement (Consent of Authentication) should be made between the Department and eSign Service provider to avail the eSign service.

STEPS TO FOLLOW:

1. Click opens an Approved **draft** from the **‘List of Drafts’**.

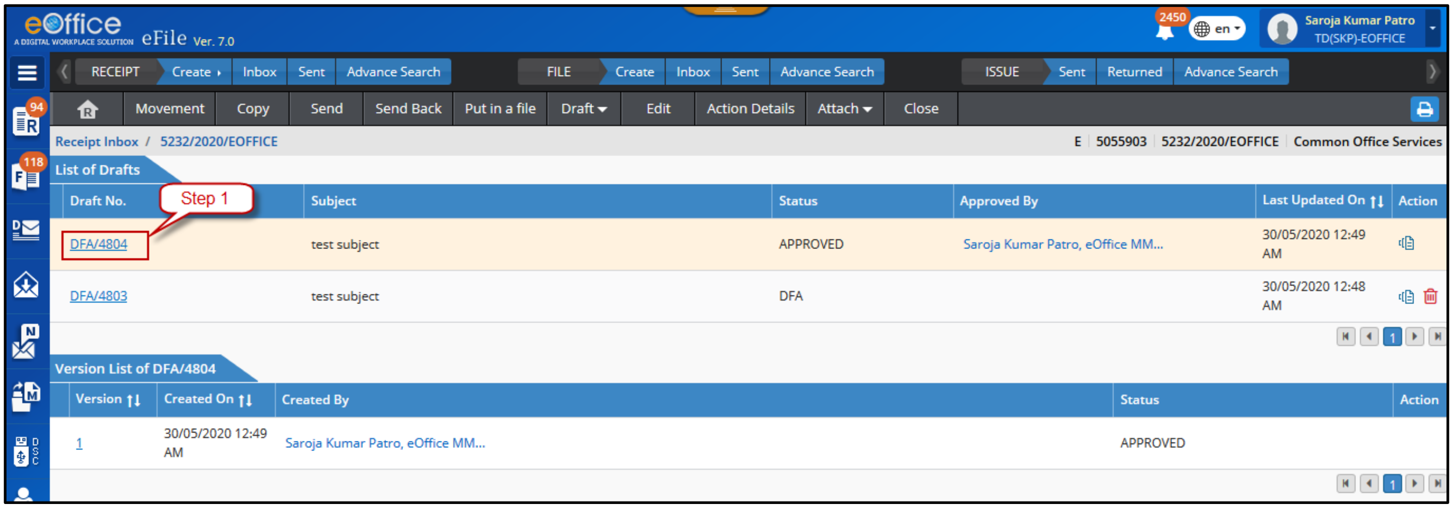


Figure 91

2. Click **‘eSign’** button.

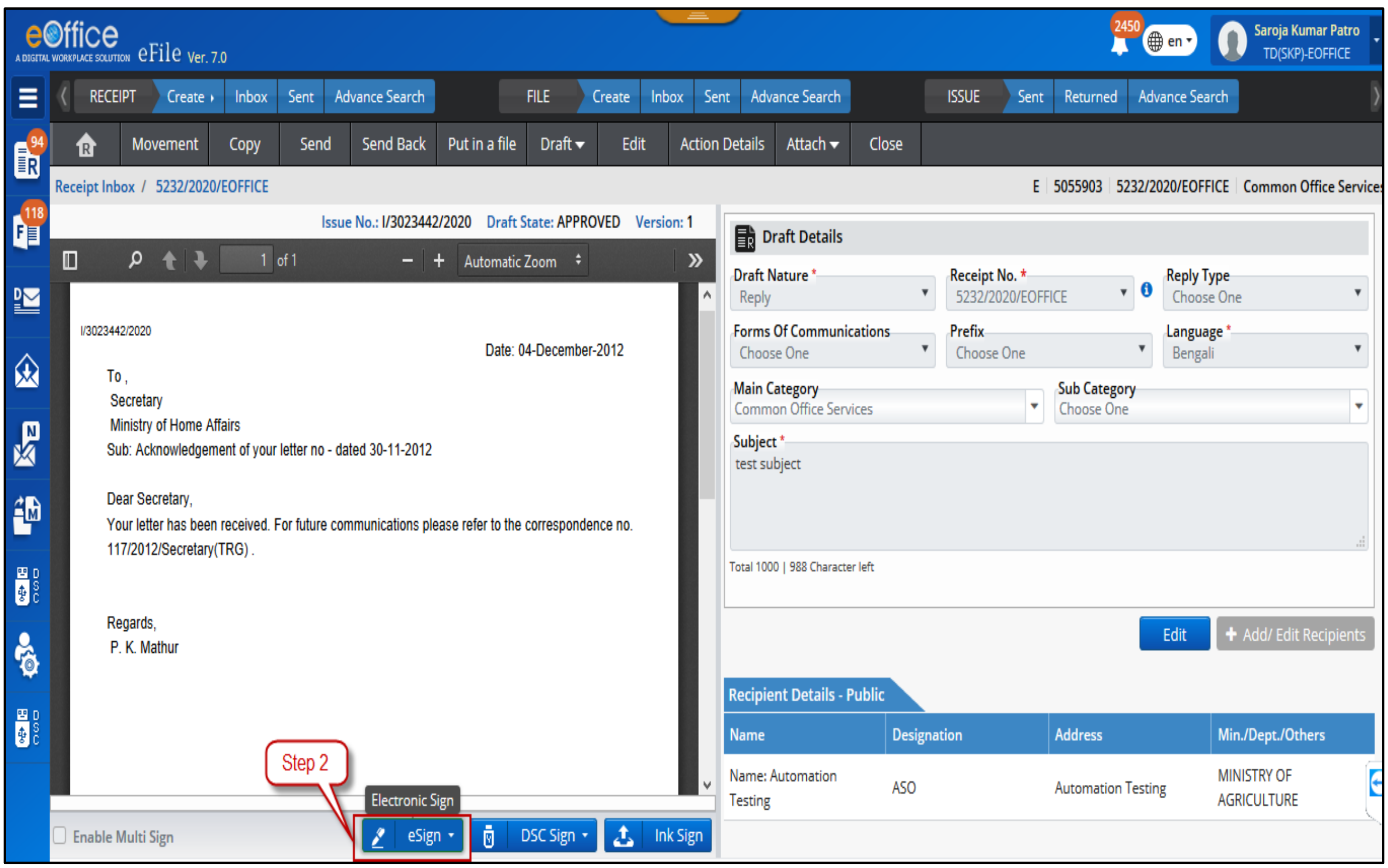


Figure 92

To Sign with OTP method at default location

3. Click **'Default'** and choose option **'with OTP'**.

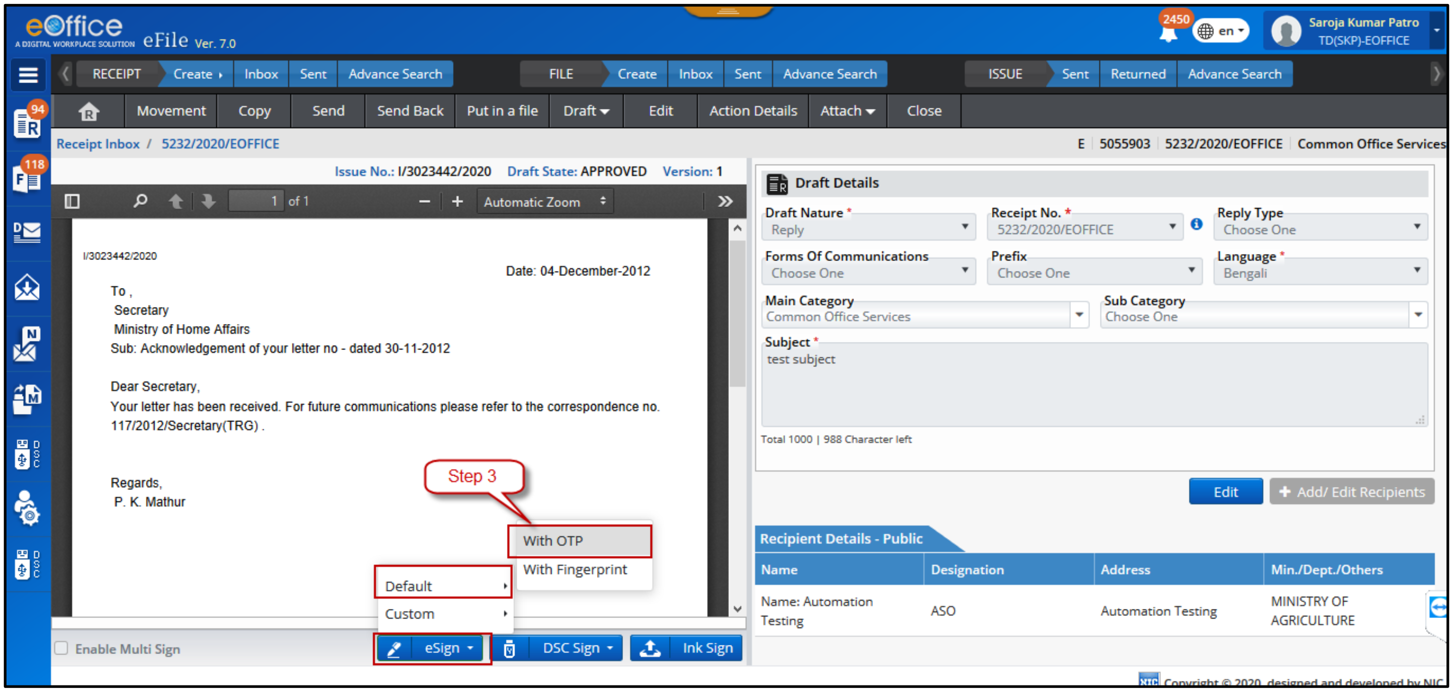


Figure 93

4. To proceed, read and agree to the **'Consent for Authentication form'** and then you are redirected to the eSign service portal.

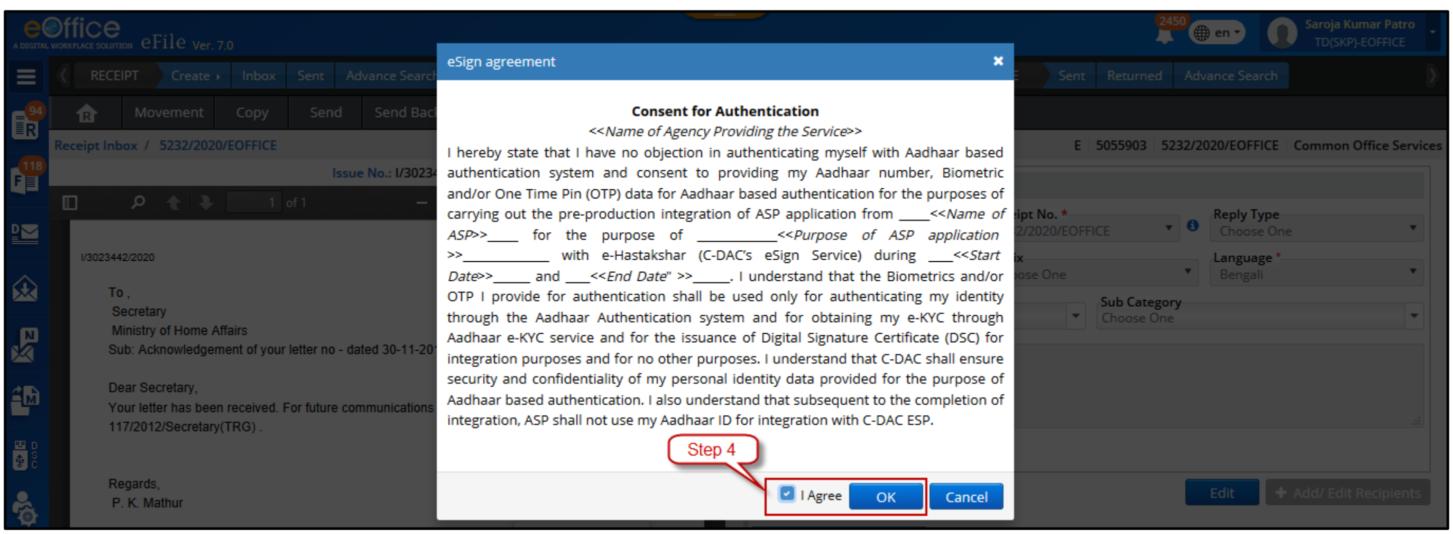


Figure 94

5. Enter your Aadhaar Number/Virtual ID and Click **'Get OTP'**.

Figure 95

6. Enter the OTP received on the registered mobile number.
7. Click **'Submit'** to eSign the approved draft.

To Sign with Fingerprint method at default location

3. Click **'Default'** and choose option **'with Fingerprint'**.

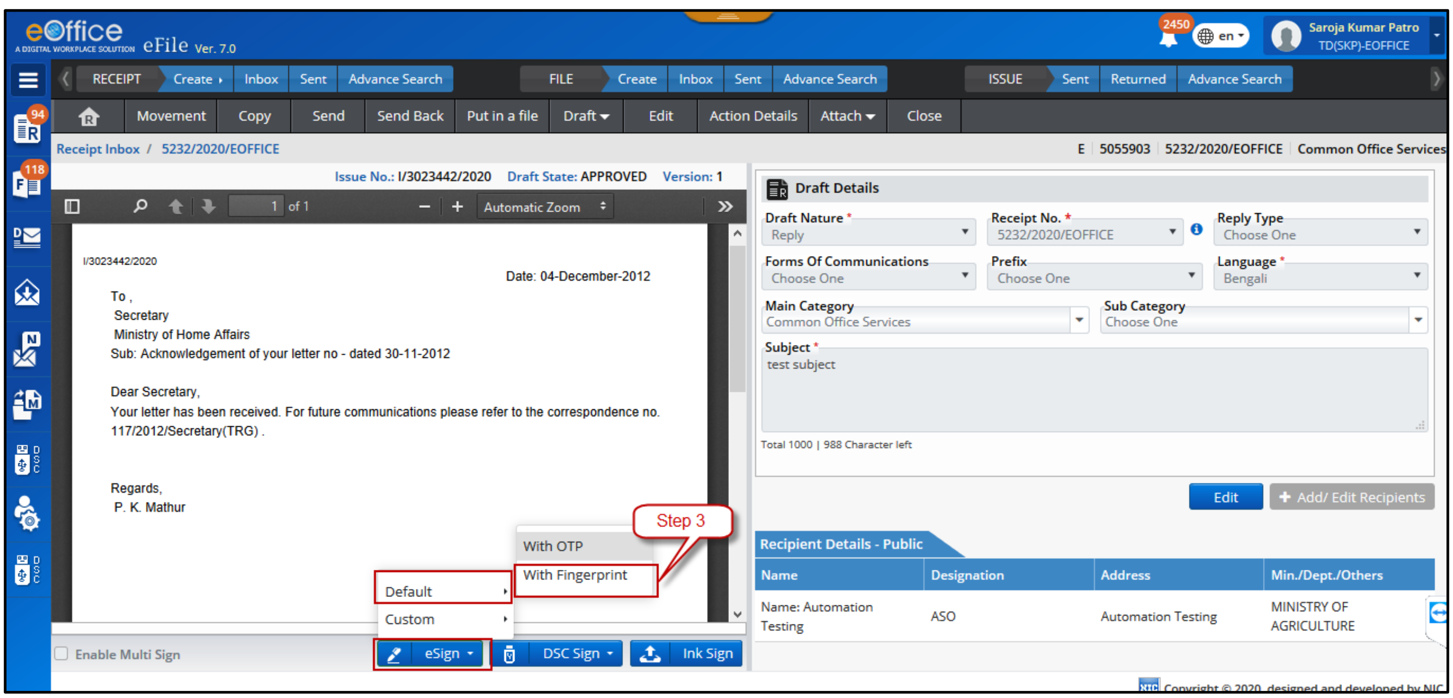


Figure 96

4. To proceed, read and agree to the **'Consent for Authentication form'** and then you are redirected to the eSign service portal.

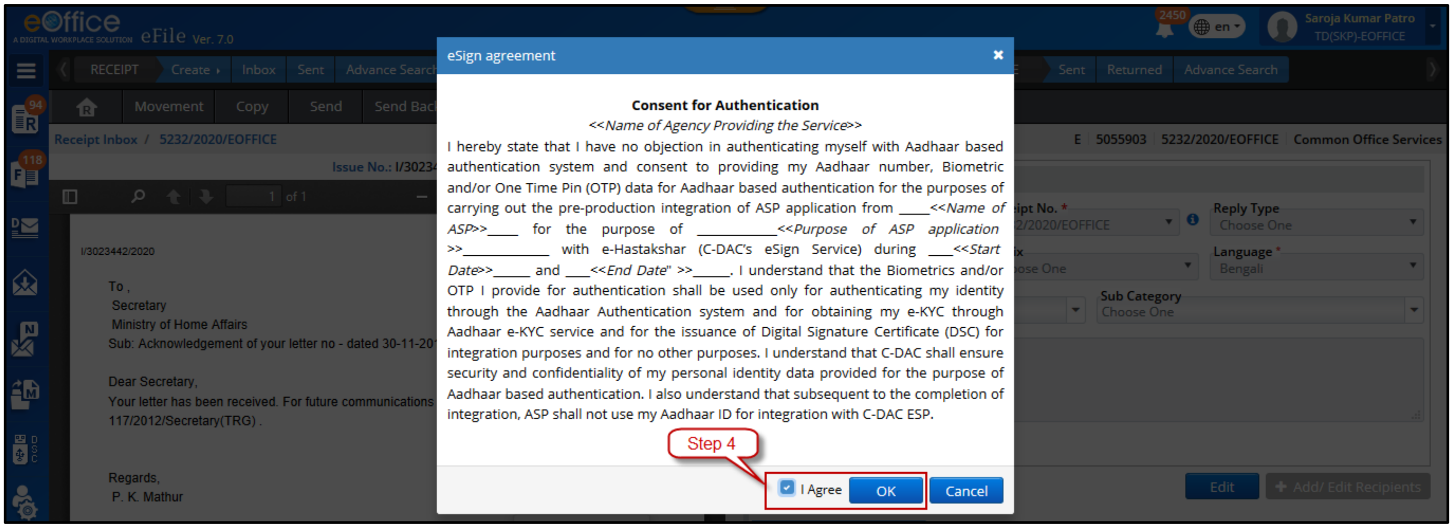


Figure 97

5. Enter your Aadhaar Number/Virtual ID and Click **'Discover Biometric Device'**.

Figure 98

6. Select the **Fingerprint scanner** from the discovered connected device(s).
7. Click **'Capture'** to capture the fingerprint.
8. Click **'Submit'** after successfully capturing the fingerprint to eSign and Send.

To Sign with OTP method at location of your choice

3. Click **'Custom'** and choose option **'with OTP'**.

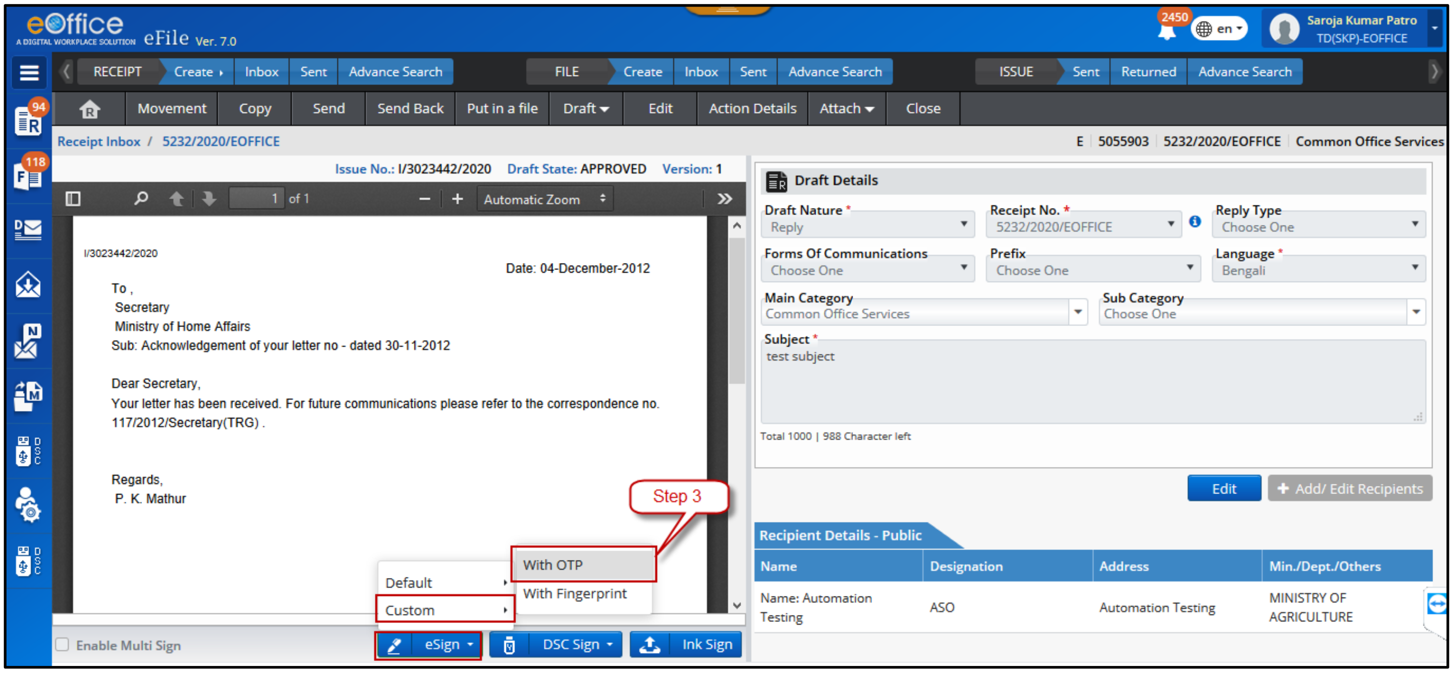


Figure 99

4. In the Custom Sign pop up window, select signing area by dragging left click using mouse pointer.

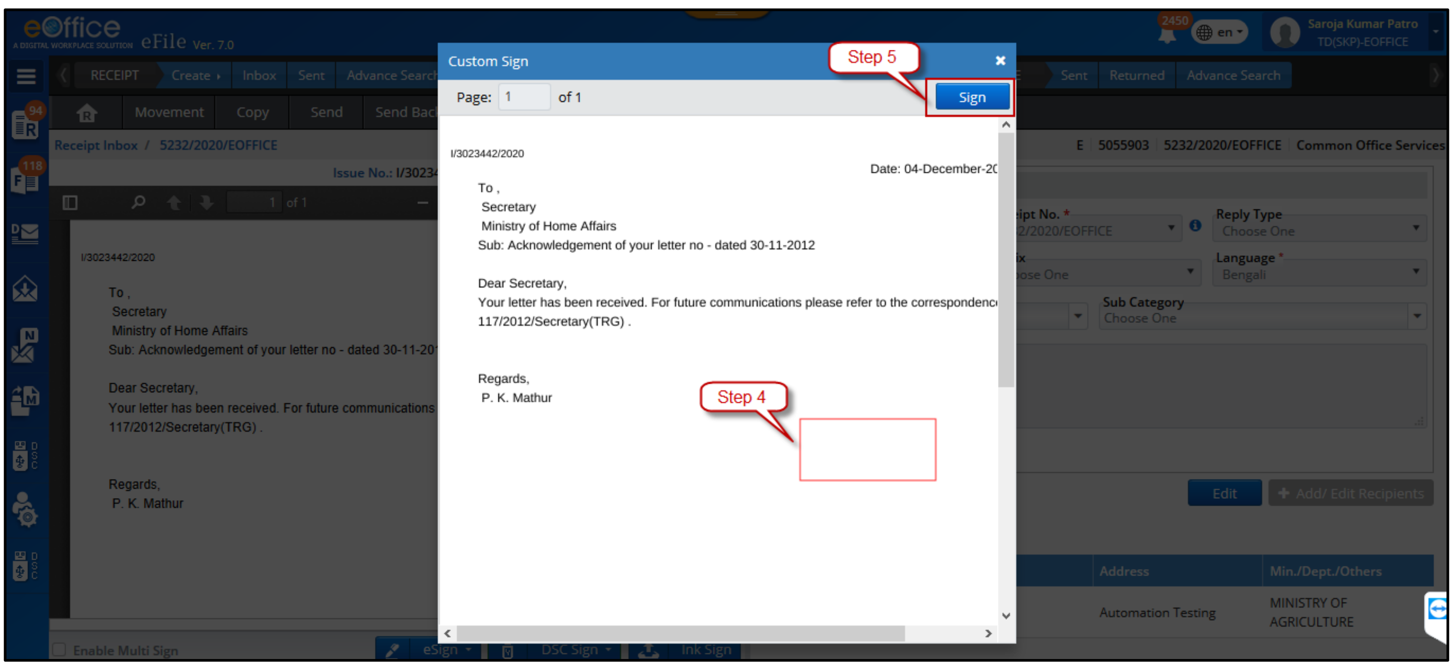


Figure 100

5. Click **'Sign'**.

6. To proceed, read and agree to the **'Consent for Authentication form'** and then you are redirected to the eSign service portal.

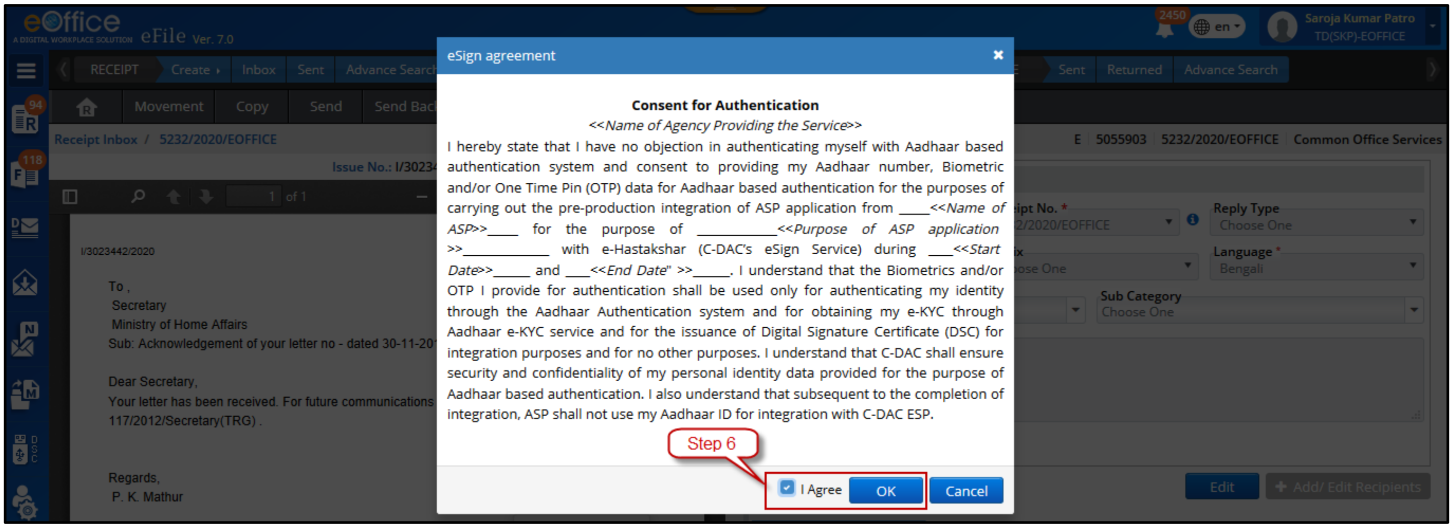


Figure 101

7. Enter your Aadhaar Number/Virtual ID and Click **'Get OTP'**.

Figure 102

8. Enter the OTP received on the registered mobile number.
9. Click **'Submit'** to eSign the approved draft.

To Sign with Fingerprint method at location of your choice

3. Click **'Custom'** and choose option **'with Fingerprint'**.

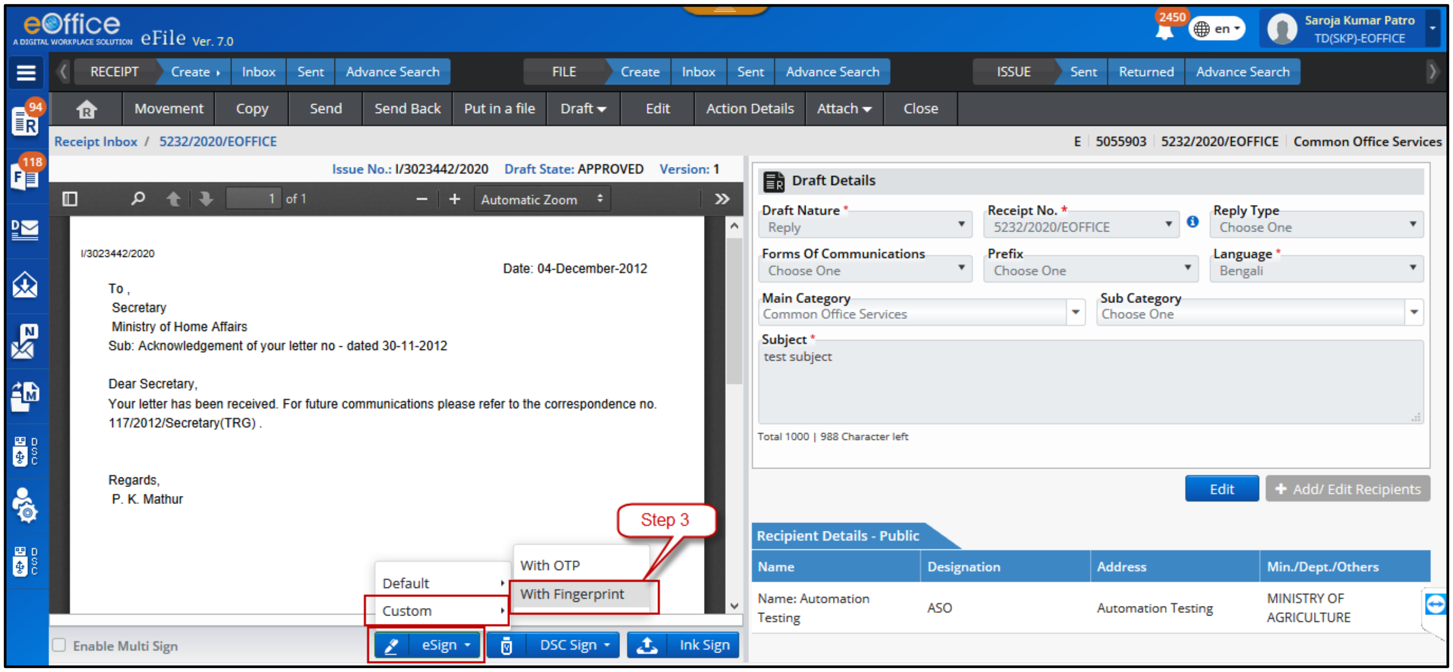


Figure 103

4. In the Custom Sign pop up window, select signing area by dragging left click using mouse pointer.

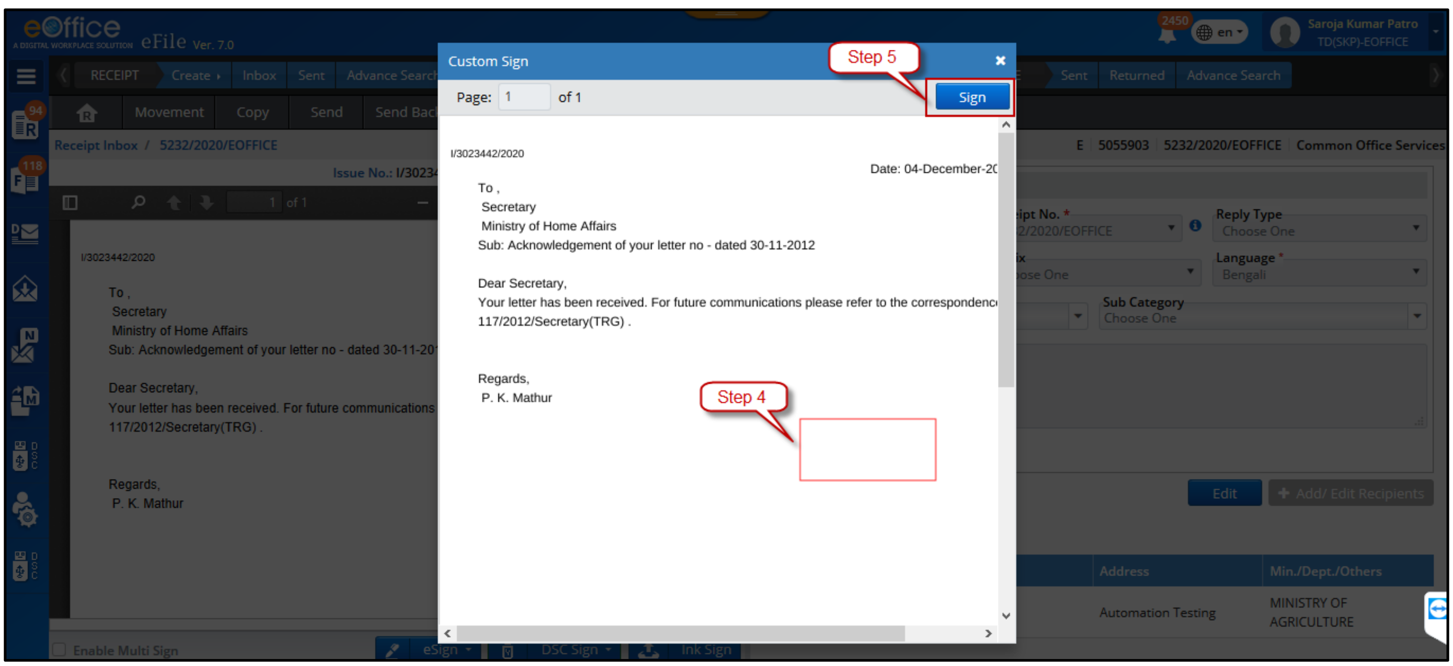


Figure 104

5. Click **'Sign'**.
6. To proceed, Read and Agree to the **'Consent for Authentication form'** and then you are redirected to the eSign service portal.

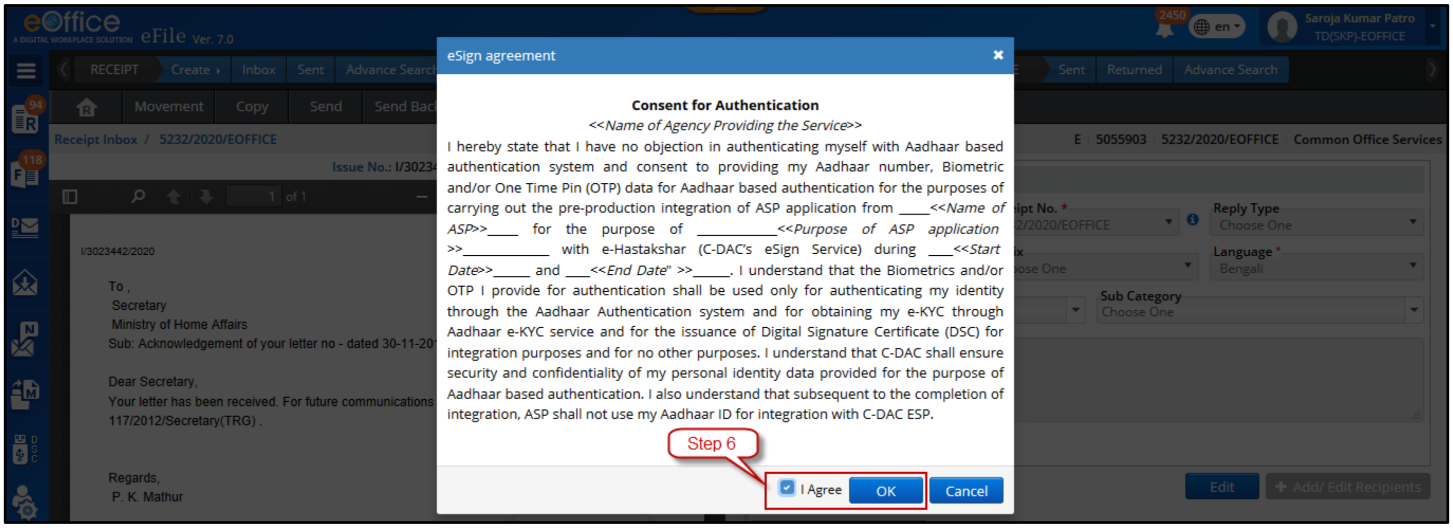


Figure 105

7. Enter your Aadhaar Number/Virtual ID and Click **'Discover Biometric Device'**.

Figure 106

8. Select the **Fingerprint scanner** from the discovered connected device(s).
9. Click **'Capture'** to capture the fingerprint.
10. Click **'Submit'** after successfully capturing the fingerprint to eSign and Send.

Note:

- Draft status should change to **Signed**.
- User shall be able to view Digital Signature(s) on signature panel of signed draft.
- Option of Edit (Recipient Detail) and Dispatch should be available.
- Signing details (user's name, date and time stamp of signing) should be embossed on the Approved DFA content at the bottom left of the document or at desired location in case of custom sign.

Ink Sign

It is the process of maintaining a copy of physically signed draft letter and confirming it with its originally approved copy in the system.

IMPORTANT – Ink Sign copy of only those drafts can be maintained in the system which are not Multi Sign enabled.

STEPS TO FOLLOW:

1. Click opens an Approved **draft** from the **'List of Drafts'**.

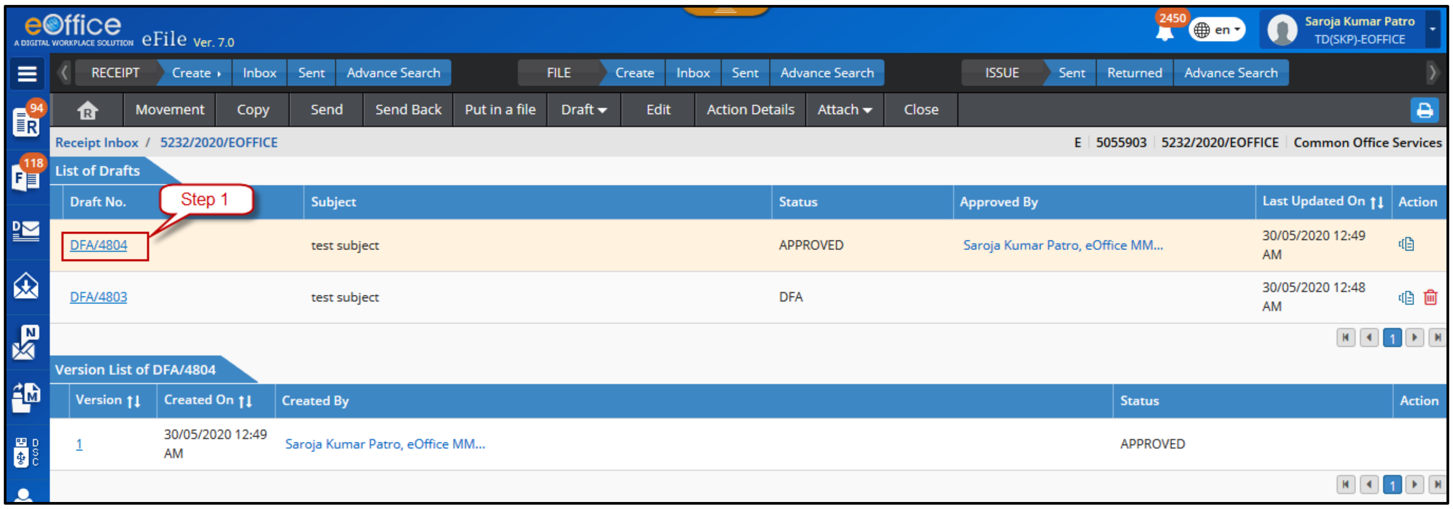


Figure 107

2. Click **'Ink Sign'** button and upload the physically signed copy (PDF format) of approved draft. (**Note:** The uploaded signed copy can be downloaded by clicking on 'Signed Copy' link.)

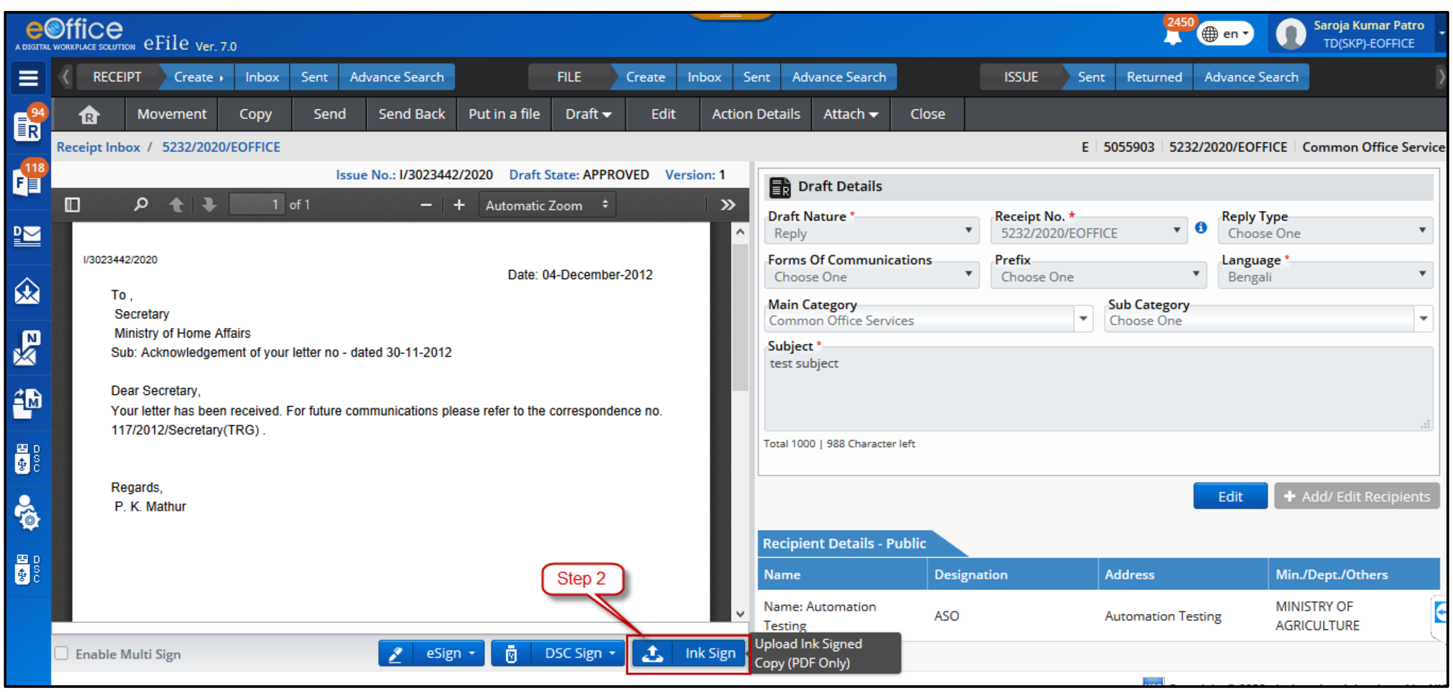


Figure 108

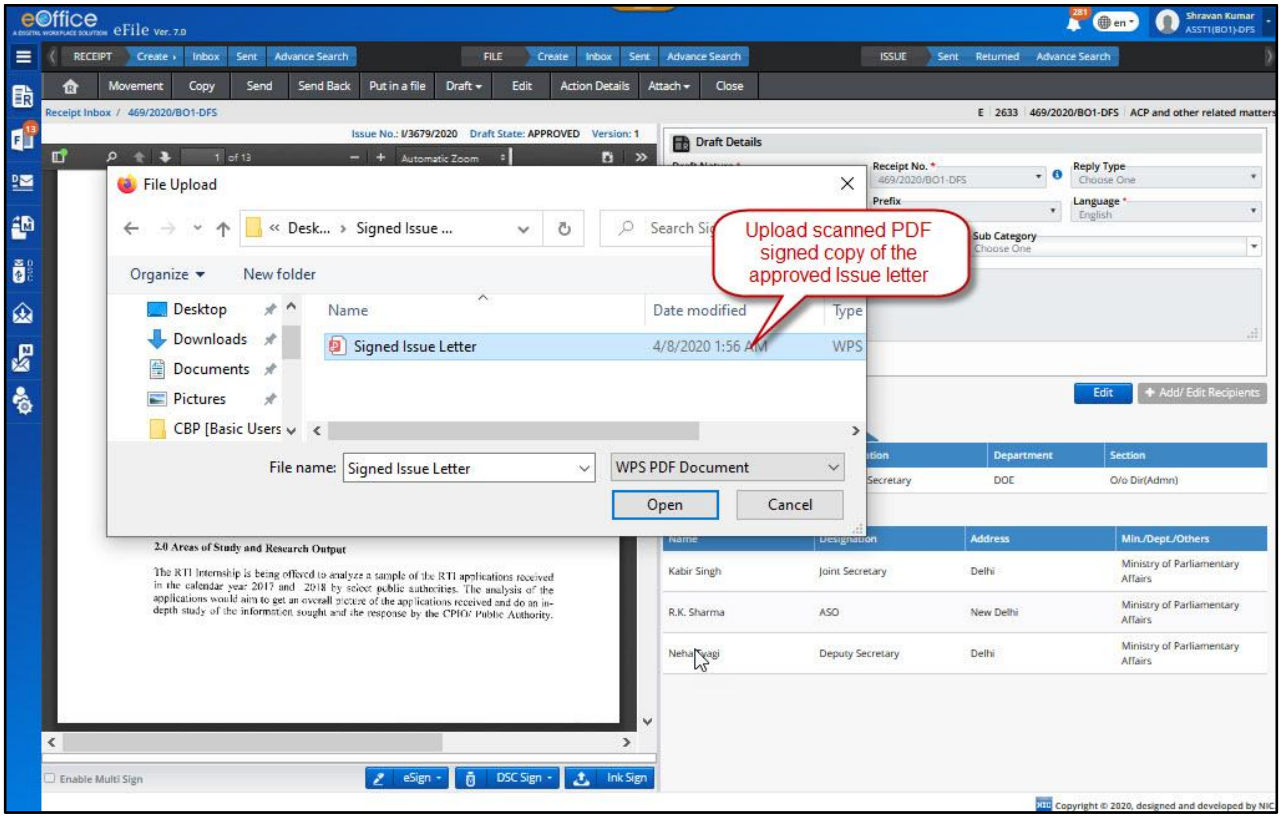


Figure 109

3. Click **'Confirm/Discard Ink Sign'** option. The ***Approved Copy*** and uploaded ***Signed Copy*** will be displayed side by side in a popup window for comparison, with option to **'Confirm', 'Discard'** and **'Close'**.

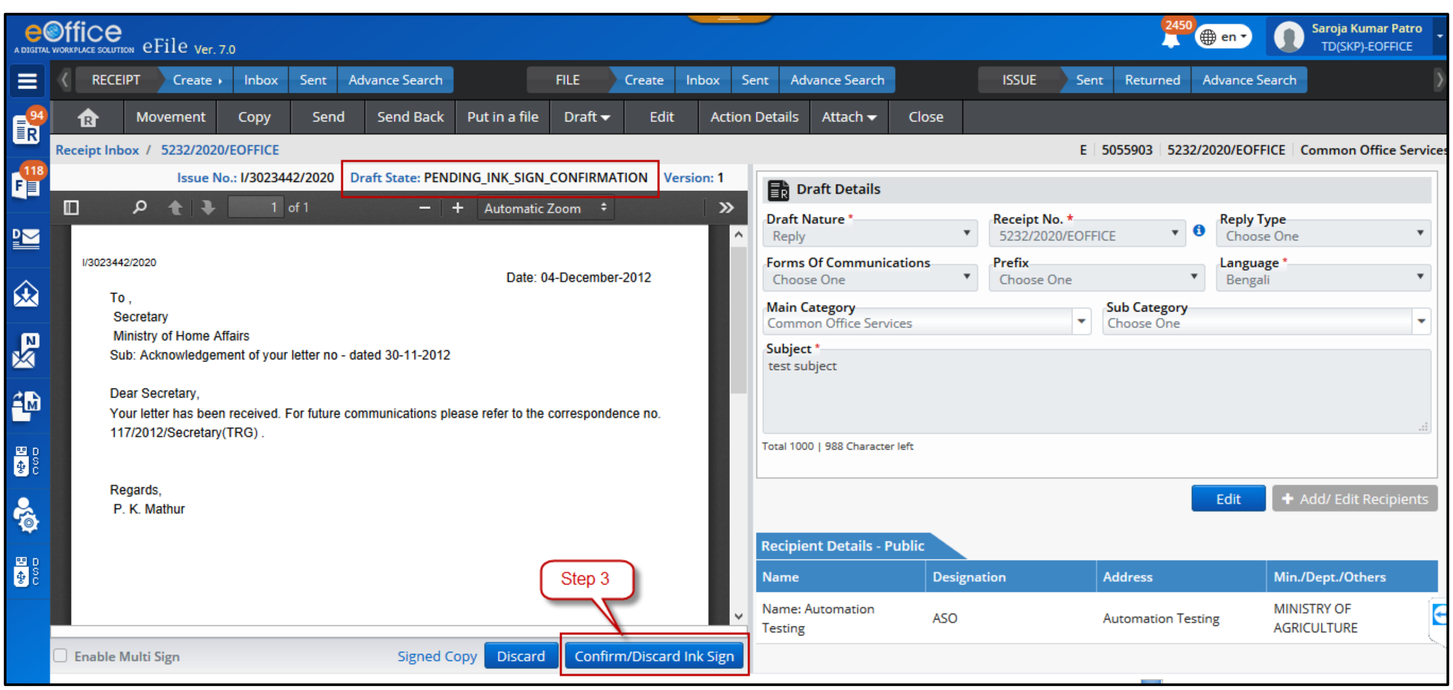


Figure 110

4. Click **'Confirm'** in the Pop-up window to complete the physical signing of the draft (or discard to re-upload the correct signed document and then 'Confirm'.)

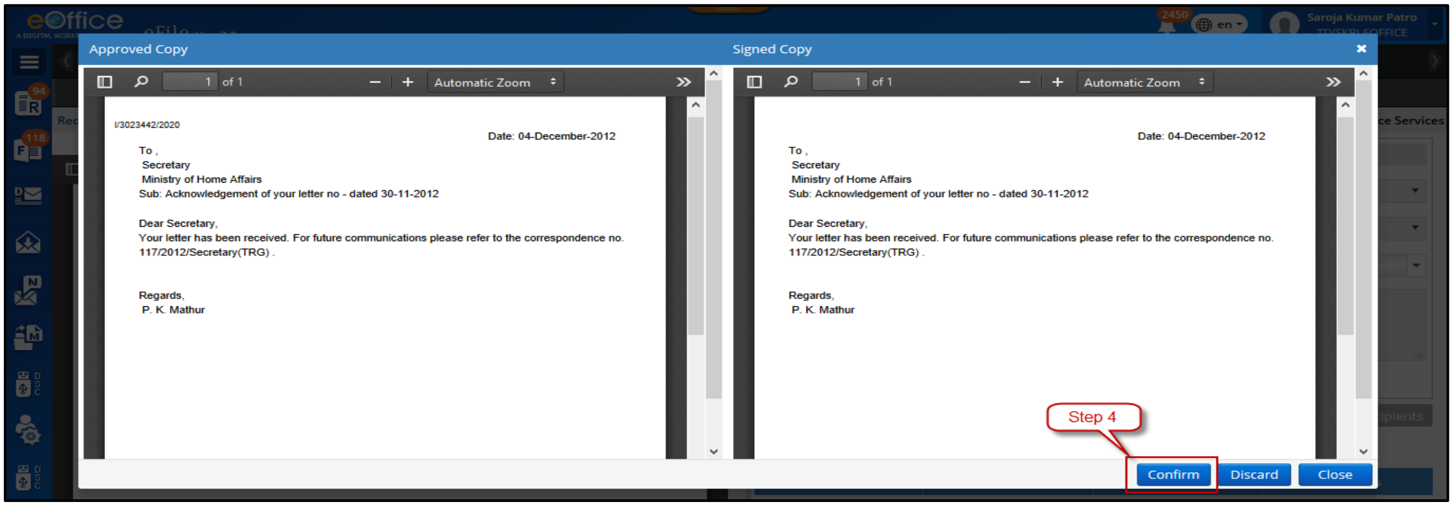


Figure 111

The ink signed copy of the approved draft is visible on the Left side and the approved copy can be seen by clicking on 'Approved copy' link available below.

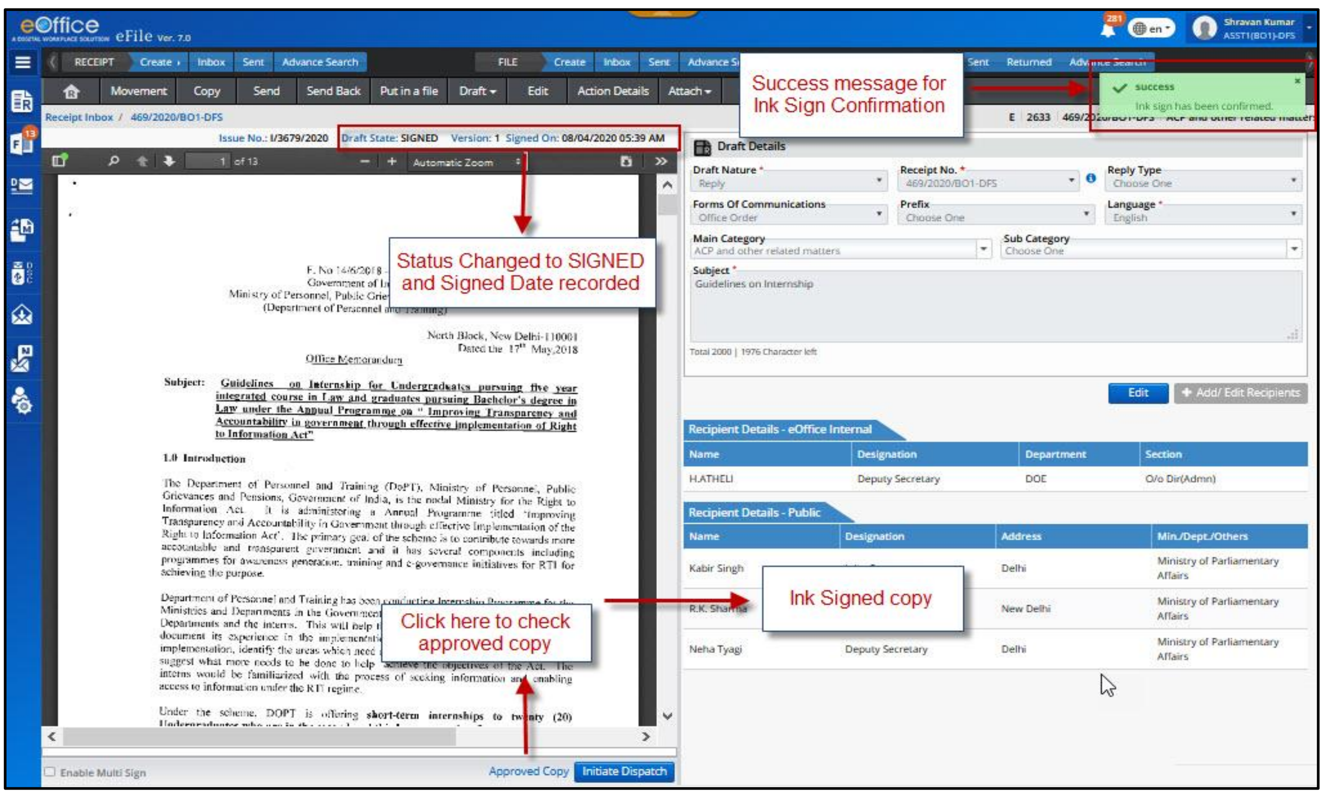


Figure 112

Note:

- After uploading the signed copy, the Draft status will change to **'PENDING_INK_SIGN_CONFIRMATION'.**
- After confirmation of uploaded signed Copy (**Confirm Ink Sign**) Draft status will change to **'Signed'** from **'PENDING_INK_SIGN_CONFIRMATION'**.

Dispatch from Receipt

This feature allows User to **Dispatch Signed Draft** (Issue) letters through **Self** or **CRU** (Central Registering Unit) against an electronic receipt –

Electronic Receipts

STEPS TO FOLLOW:

1. Click the signed draft no. from the **'List of Drafts'** required to dispatch.

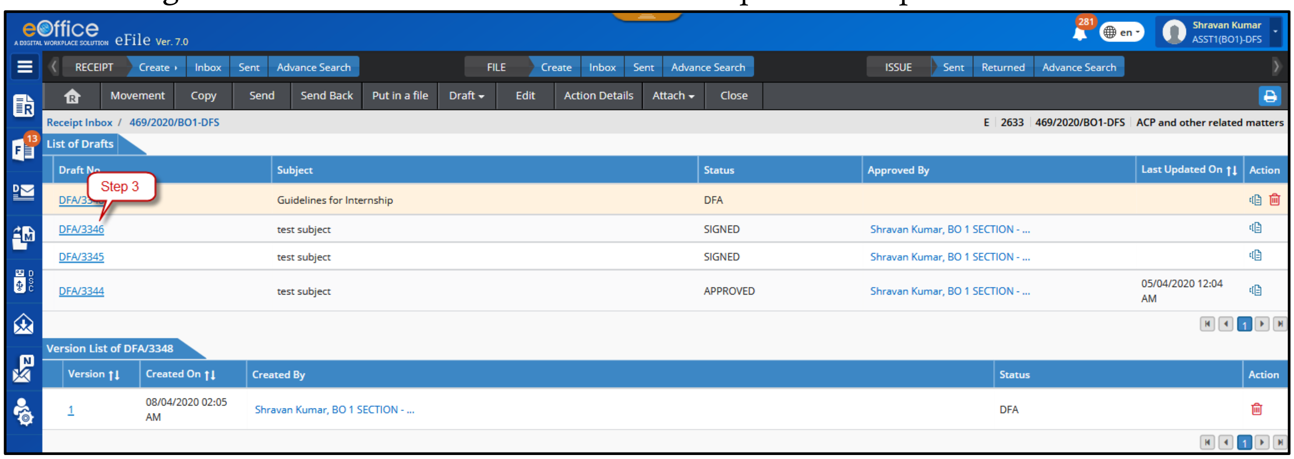


Figure 113

2. Click**'Initiate Dispatch'** to initiate the Dispatch Process.

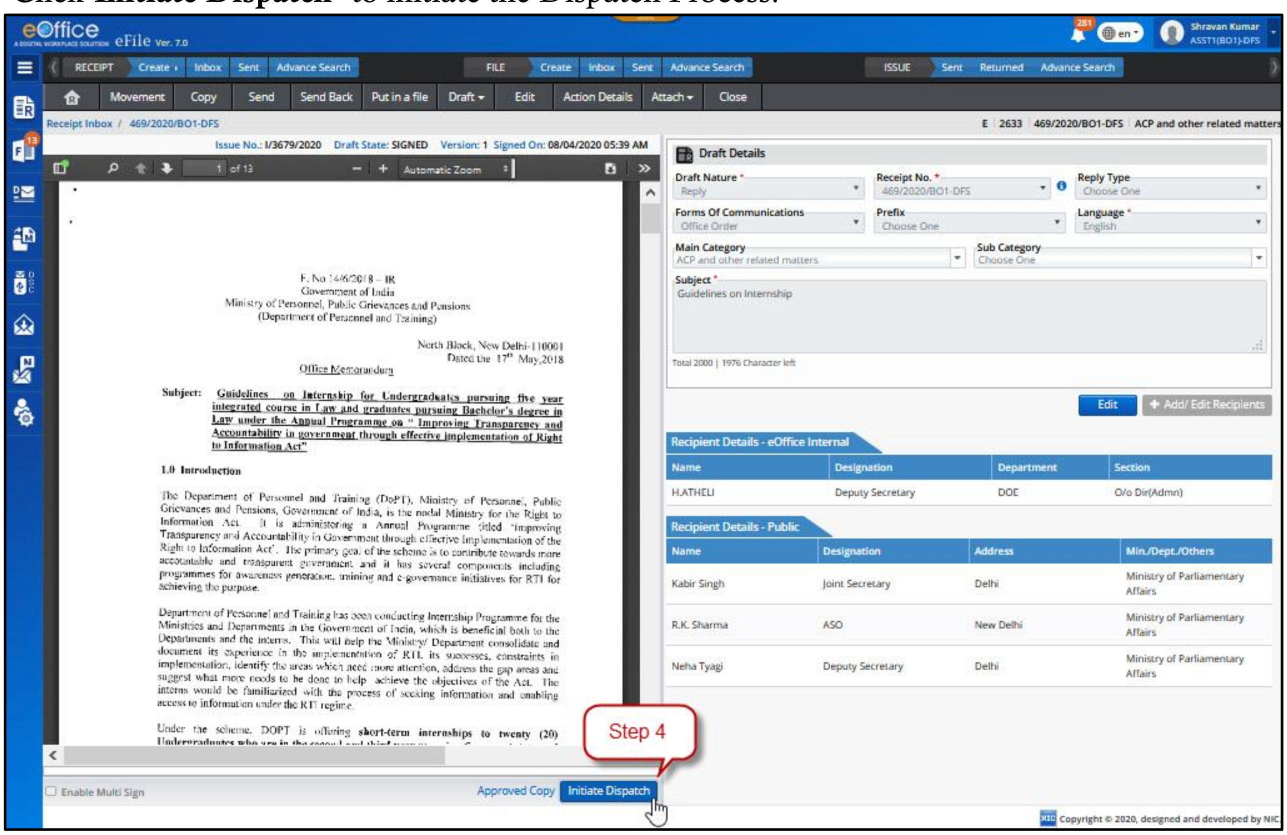


Figure 114

3. Intended recipients are listed under **‘Recipient Details’**. Click **‘Add Recipients’** to add more, if required.

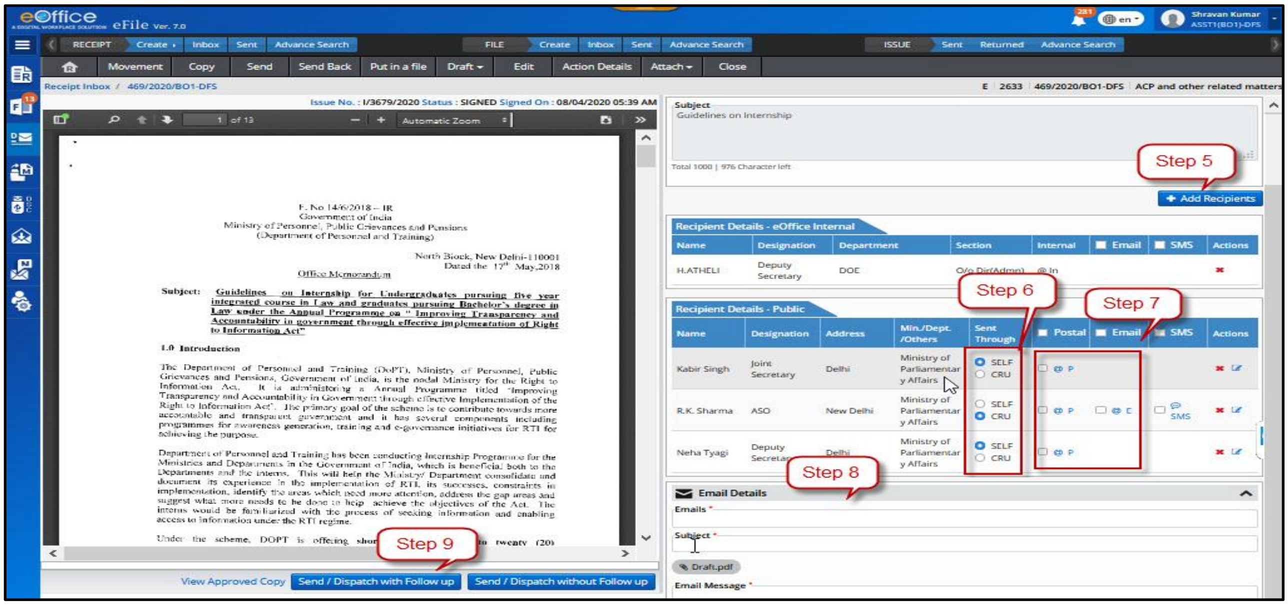


Figure 115

4. In **Recipient Details – Public**, select **Sent Through** for each public recipient (**Self** or **CRU**).

   a) **Self** – Choose **‘SELF’**, if the letter is to be dispatched through self.

   b) **CRU** – Choose **‘CRU’**, if letter is to be dispatched through Central Registry Unit.

   On Selecting **CRU** Popup will be displayed. Fill CRU details in popup –

   - **CRU Name** – Name of the dispatch person in CRU through which letter is to be dispatched.
   - **Delivery Mode** – Delivery mode via which letter is to be dispatched
   - **Remarks** – Additional remarks for the dispatch person if any.
   - **Copy to All** – Select checkbox to auto fill CRU details in all the Public Recipient, to whom letter is dispatching through is CRU.

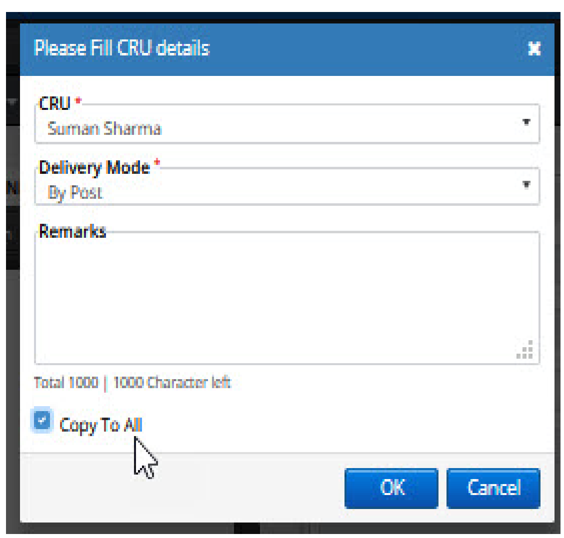


Figure 116

Note:

- Dispatch by **Self** and **CRU** is not applicable for '**Internal**' and **'External' Recipient**.
- Dispatch to recipients under **'Internal'** and **'External'** will take place as eOffice to eOffice transaction.

5. Enter Delivery Mode -
   a) **Postal** - Select Postal checkbox and fill postal details if dispatching through post.

Note:

- Delivery Mode **'Postal'** is available only in case DISPATCH mode chosen is 'SELF'

(**Postal Details** - Postal Mode*, Postal charges, Medium, Weight, Mode No., Peon Book No., Peon Name, Out Date and Time*, Delivery Date and Time, Delivery Status and check **'Copy to All'** in case the postal details are to be copied to all recipients in case of multiple recipients)

   b) **Email** – Select **'Email'** check box and fill email details, if letter is to be dispatched via email.
   Email Details to be entered are - Email Id (Auto populated if available), Subject, Email Message. User can check **'Copy to All'** in case the same message is to be copied to all recipients in case of Multiple recipients)

   c) **SMS** – Select SMS checkbox and provide mobile no. (Auto populated if available) for sending notification to the recipient regarding the dispatch.

Note:

- Delivery Mode **'Email'** and **SMS'** are available only in case the email ID and mobile number details of the respective recipient is added in the recipient details.

6. **Enter Additional Email Details** – If the letter is to be dispatched additionally to some people, then this can be done via email. For example, you might want to dispatch a copy to one of the officials in senior management for information purpose only. For dispatching to additional users, provide Email ID, Subject and Email Message. The Dispatch letter is automatically attached to the email.

7. Click **Send –**

   a) **Send/Dispatch with Follow up** – Follow up is useful when a follow-up has to be saved for self or all employees in the same Office/Section/Unit for the letter which is being dispatched. On the follow-up date, the intended employee(s) will receive a notification for the follow-up then created.
   After clicking on **'Send/Dispatch with Follow up'** fill following details in **Follow-up Setting Popup**-
   - **Desired Action** – Choose one of the actions that describe the purpose of the follow-up.
   - **Description** – Type in remarks for the follow-up.
   - **Due Date** – Provide the follow up date.

- **Follow up for** – Choose **'Self'** if only the self is to be notified on defined due date for the follow-up or choose **'Section'** to notify all of the employees in Office/Section/Unit.

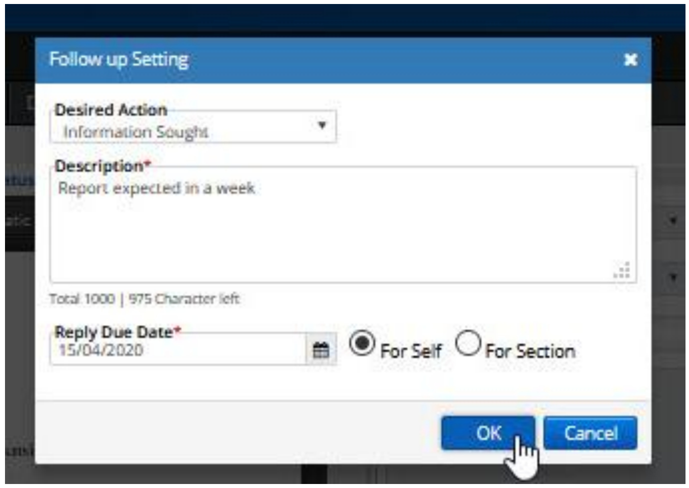


Figure 117

b) Send/Dispatch Without Follow Up – For Sending /Dispatching the letter without creating any follow-up.

Note:

- To check the list of Issue letters sent so far, and check their respective Dispatch numbers generated for every recipient, Refer **Dispatch (Officer)→Issue→Sent**.

Physical Receipts

STEPS TO FOLLOW:

1. Click opens a physical Receipt from **Created/Inbox/Inbox Sub-Folder** list of Receipts.

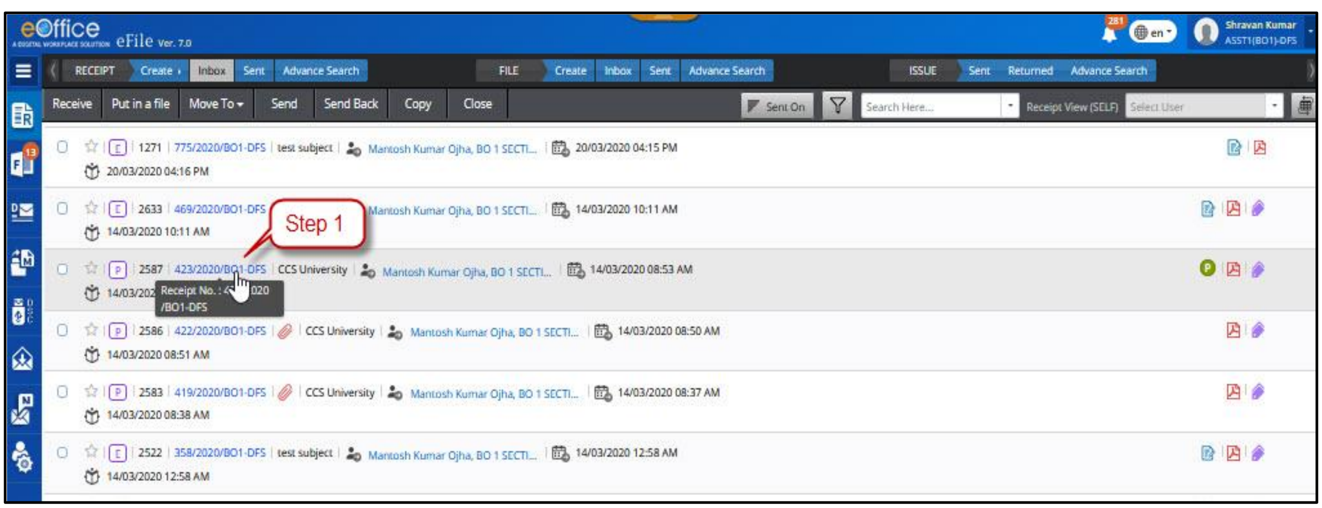


Figure 118

2. Click **'Dispatch'** in the menu.

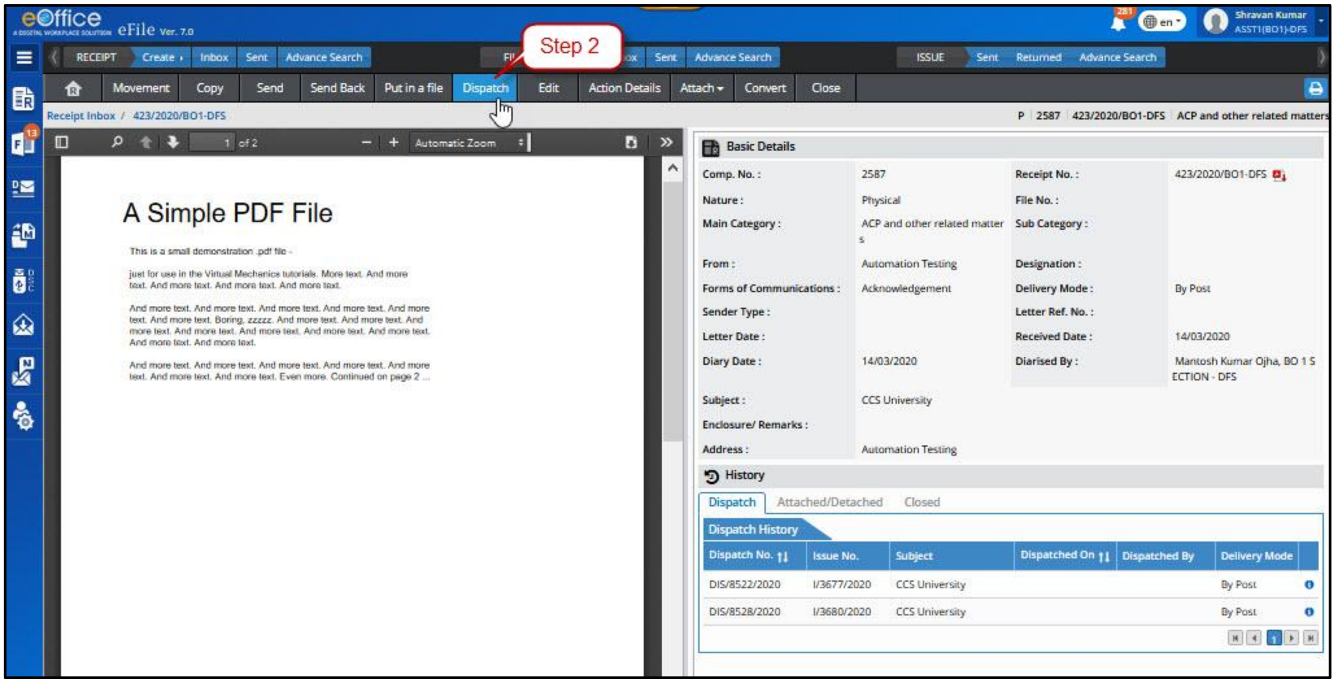


Figure 119

3. **Upload** the copy of the Signed copy of the Issue letter to be dispatched on the left panel, if required. (Not mandatory).

Note:

- Uploading the Issue letter in the system gives the user an option to dispatch the issue letter via email also, provided that the email details of the recipient(s) is available.

4. Fill in the 'Draft details' on the right side of the screen. Drafts details include 'Draft Nature', 'Reply Type', 'Forms of Communication', 'Prefix', 'Language', 'Subject Category', 'Sub Category' and Subject description.

Note:

- **Draft Nature**: Choose -
  - **New/Fresh** – If the draft is being prepared as fresh communication being initiated.
  - **Reply** – If the draft is being prepared as a reply against the receipt.
  - **Reminder** – If the draft is being prepared as a reminder to the previously dispatched communications against the receipt.
- **Draft Nature** – '**Reminder**' is only available if any Issue/Official communication has been already dispatched against the receipt.
- By default, '**Reply**' is selected as '**Draft Nature**'. Upon selecting '**New/Fresh**' the '**DAK/Letter'** sender details added as recipient details will be removed.

5. Intended recipients are listed under **'Recipient Details'**. Click **'Add Recipients'** to add more, if required.

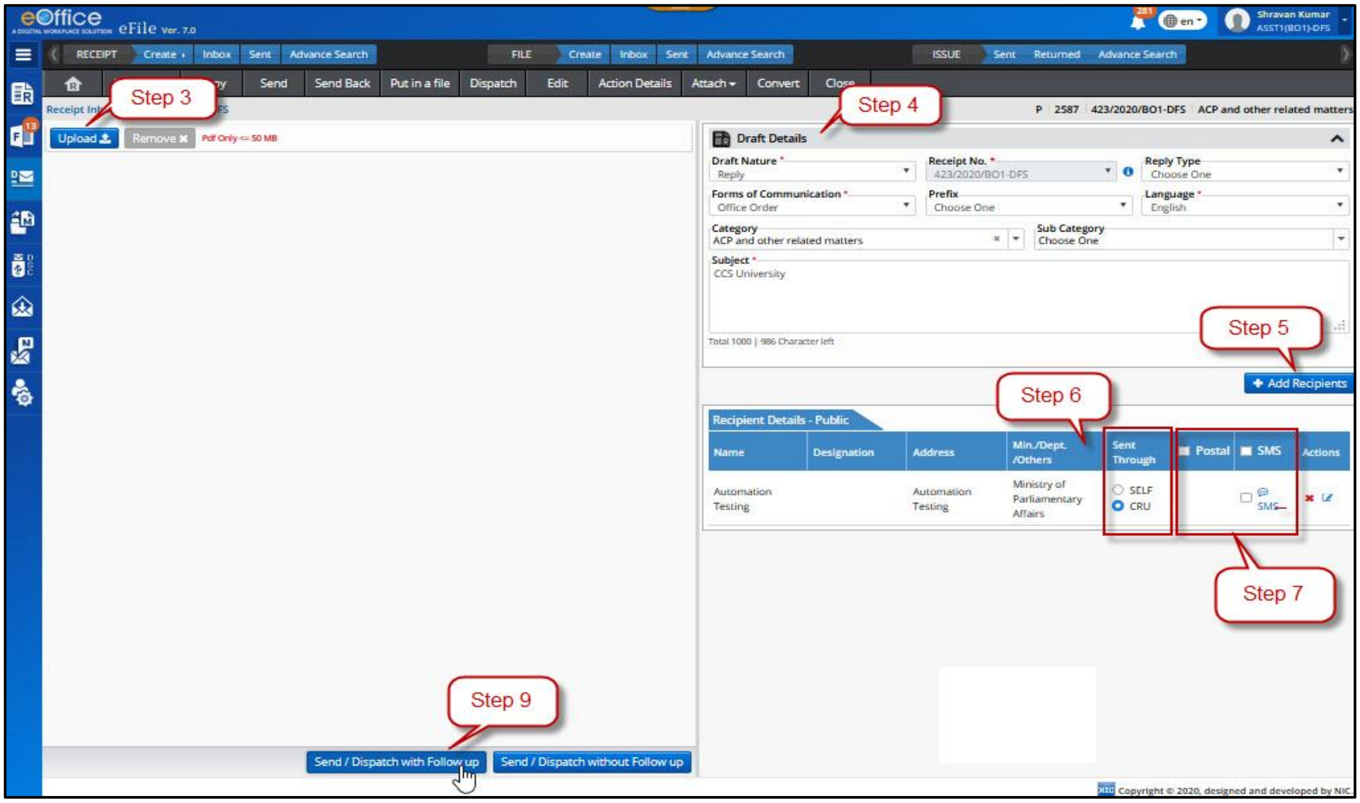


Figure 120

6. In **Recipient Details – Public**, select **Sent Through** for each public recipient (**Self** or **CRU**).

   a) **Self** – Choose **'SELF'**, if the letter is to be dispatched through self.

   b) **CRU** – Choose **'CRU'**, if letter is to be dispatched through Central Registry Unit.

   On Selecting **CRU** Popup will be displayed. Fill CRU details in popup –

   - **CRU Name** – Name of the dispatch person in CRU through which letter is to be dispatched.
   - **Delivery Mode** – Delivery mode via which letter is to be dispatched
   - **Remarks** – Additional remarks for the dispatch person if any.
   - **Copy to All** – Select checkbox to auto fill CRU details in all the Public Recipient, to whom letter is dispatching through is CRU.

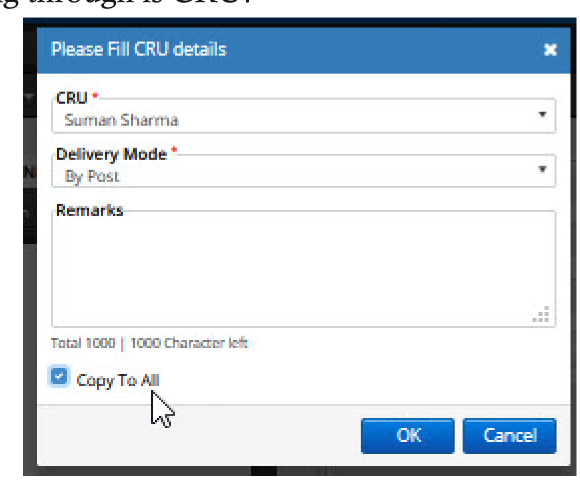


Figure 121

Note:

- **Internal** and **External** eOffice recipient option will not be available for dispatch against Physical Receipt. I.e. eOffice to eOffice dispatch feature is not available in case of Issue letters prepared against physical receipts.

7. Enter Delivery Mode -

   a) **Postal** - Select Postal checkbox and fill postal details if dispatching through post.

Note:

- Delivery Mode **'Postal'** is available only in case DISPATCH mode chosen is 'SELF'

(**Postal Details -** Postal Mode*, Postal charges, Medium, Weight, Mode No., Peon Book No., Peon Name, Out Date and Time*, Delivery Date and Time, Delivery Status and check **'Copy to All'** in case the postal details are to be copied to all recipients in case of multiple recipients)

   b) **Email** – Select **'Email'** check box and fill email details, if letter is to be dispatched via email.

   Email Details to be entered are - Email Id (Auto populated if available), Subject, Email Message. User can check **'Copy to All'** in case the same message is to be copied to all recipients in case of Multiple recipients)

   c) **SMS** – Select SMS checkbox and provide mobile no. (Auto populated if available) for sending notification to the recipient regarding the dispatch.

Note:

- Delivery Mode **'Email'** and **SMS'** are available only in case the email ID and mobile number details of the respective recipient is added in the recipient details.

8. **Enter details under 'Email Details'** – If the letter is to be dispatched additionally to some people, then this can be done via email. For example, you might want to dispatch a copy to one of the officials in senior management for information purpose only. For dispatching to additional users, provide Email ID, Subject and Email Message. The Dispatch letter is automatically attached to the email.

Note:

- Dispatch via Email feature (In step **7(b) and 8**) is only available in case the scanned copy of the Issue letter was uploaded in step 2.

6. Click **'Send' –**

   a) **Send/Dispatch with Follow up** – Follow up is useful when a follow-up has to be saved for self or all employees in the same Office/Section/Unit for the letter which is being dispatched. On the follow-up date, the intended employee(s) will receive a notification for the follow-up then created.

   After clicking on **'Send/Dispatch with Follow up'** fill in the following details to create a follow-up and dispatch the letter simultaneously-

   - **Desired Action** – Choose one of the actions that describe the purpose of the follow-up.

- **Description** – Type in remarks for the follow-up.
- **Due Date** – Provide the follow up date.
- **Follow up for** – Choose **'Self'** if only the self is to be notified on defined due date for the follow-up or choose **'Section'** to notify all of the employees in Office/Section/Unit.

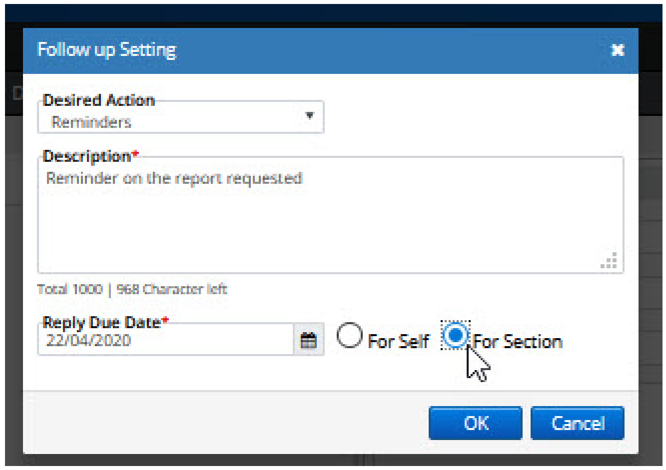


Figure 122

b) **Send/Dispatch Without Follow Up –** For Sending /Dispatching the letter without creating any follow-up.

Note:

- Issued dispatch details will be available in **Dispatch →Issue→Sent** list of Officer. More details can be viewed by clicking on Issue number link.
- Issued dispatch will be made part of the dispatch history of the receipt.
- In case of multiple recipients, all the different dispatches (with unique dispatch no. and common issue no.) will be displayed as part of the dispatch history.
- Dispatch Recipients of same Ministry/Organization (intra-eOffice) and other Ministry/Organization (Inter-eOffice) will receive the dispatches under **Received letters (Intra eOffice and Inter eOffice respectively**) section in their eOffice account.
- User will be able to view the created follow-up notification under Notification → Dispatch Follow Ups (In case of **'Dispatch with Follow Up'**).
- **Re-dispatch** option will available for the dispatch in Sent Dispatch list.
- If Issue is dispatched through **CRU**, then the CRU user can check the dispatch record in the **'Dispatch Inbox'**.
- If dispatched through CRU, **Dispatch status** in Dispatch Sent list should be displayed as **'Sent'**, until the time it is finally dispatched by CRU. Once CRU makes the final dispatch, dispatch status will be displayed as **'Dispatched'**.
- For Issue letters dispatched by **Self**, the status of the dispatch will be **'Dispatched'**.

Send Receipt

This section describes how to forward or mark a receipt to another user in an organization or to an external organization. Receipts which are in pending state, i.e. receipts in Inbox/Inbox Folder/Created and Send can be forwarded further. Closed receipts are required to be re-opened first before forwarding.

Important Points:

- ✓ Receipt can be forwarded to only one user in '**To**' and multiple in '**CC**'.
- ✓ Physical receipts should be in received state in **Inbox/Inbox Folder** to forward further.
- ✓ Multiple receipts can be sent by selecting multiple receipts from **Inbox/Inbox Folder** and **Created** list page.
- ✓ Receipts forwarded from **Sent** list, are sent as CC (copy) of the main receipt.

STEPS TO FOLLOW:

1. Select receipt(s) or click opens a receipt from **Inbox/Inbox sub-folder/Created** list.
2. Click **'Send'** menu.

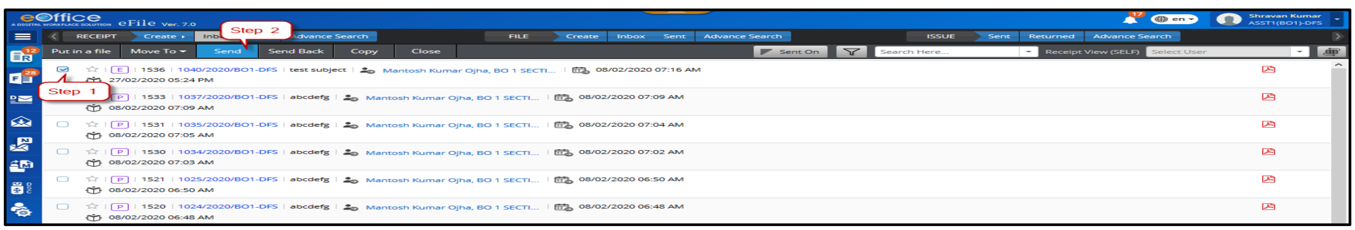


Figure 123

3. Enter the user details in **'To'** field. In case you wish to forward its copies to multiple users, enter user(s) details in '**CC**'.
4. If necessary, you may assign **Due date**, **Action**, **Priority** to the receipt. Select '**Initiate Action'**, if required. (Initiate action is configuration and role-based available feature)

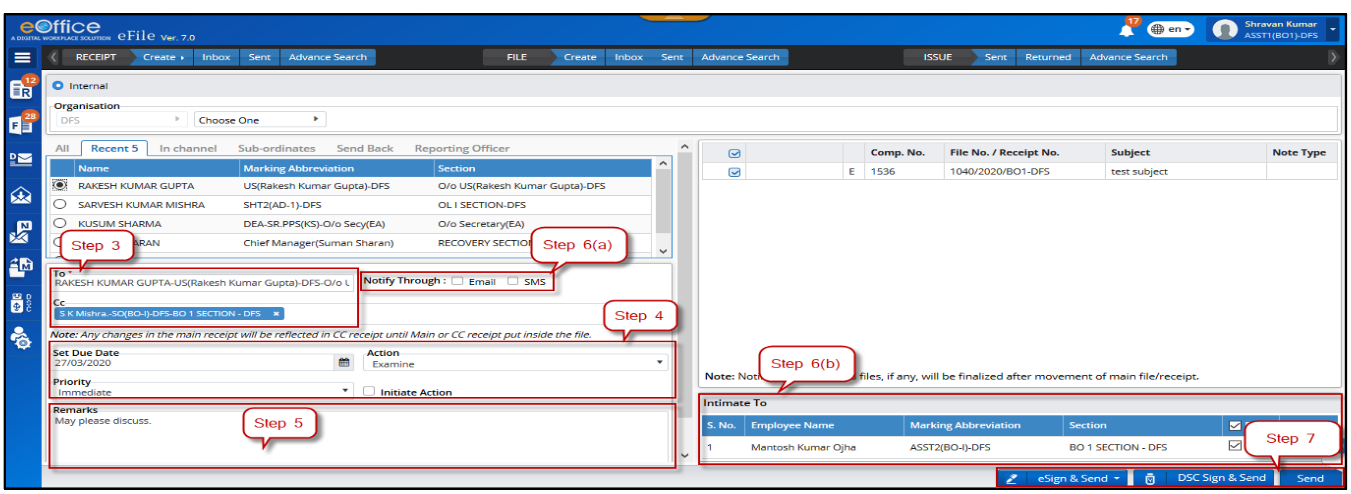


Figure 124

5. Enter **Remarks**. (mandatory for **'Initiate Action'**)
6. Choose **ALERTS** (if required) -
   a) **Notify Through Email and/or SMS** – To notify receiver of the receipt via e-mail and/or SMS.
   b) **Intimate To** – To notify the users in the previous movements of the receipt about this current movement, via e-mail and/or SMS.
7. Click –

'eSign & Send' –	To digitally sign and send using AADHAR based eSign services.
	Or
'DSC Sign & Send' –	To digitally sign and send using eToken.
	Or
'Send' –	To send the receipt without signing digitally.

(Refer steps below for **'eSign& Send**' and **'DSC Sign & Send**')

OTP based 'eSign & Send'

1. Click **'eSign'** and choose option **'with OTP'**.
2. Read and agree to the 'Consent for Authentication form' to proceed and then you are redirected to the eSign service portal.
3. Enter your Aadhaar Number/Virtual ID and Click **'Get OTP'**.
4. Enter the **OTP** received on the **registered** (with AADHAR) **mobile number**.
5. Click **'Submit'** to **eSign and Send**.

Fingerprint based 'eSign & Send'

1. Click **'eSign'** and choose option **'with 'Fingerprint'**.
2. Read and agree to the 'Consent for Authentication form' to proceed and then you are redirected to the eSign service portal.
3. Enter your Aadhaar Number/Virtual ID and Click '**Discover Biometric Device'**.
4. Select the **Fingerprint scanner** from the discovered connected device(s).
5. Click **'Capture'** to capture the fingerprint.
6. Click '**Submit**' after successfully capturing the fingerprint to eSign and Send.

DSC Sign and Send

1. Click **'DSC Sign & Send'**. (*May ensure, your eToken is registered with the application and plugged in the system*)
2. Enter the **PIN** for **DSC**.
3. Click login to Sign and Send.

KEY POINTS:

- **Inter Department Receipt Movement** - Receipt can be forwarded to users of other departments by choosing department from Organization hierarchy list and then users, in case for single instance multiple departments. By default, self-department is selected. (*Configuration based feature*).

- **Ease in Forwarding –** Provision of segregated send 'To' and 'CC' employee list to choose from, based on –

  a) **Recent 5** – List of last five employees/users to whom receipts have been forwarded

  b) **In Channel** – List of employees already in channel of submission/movement of the receipt.

  c) **Sub-ordinates** – List of employees directly reporting to the user who is forwarding the receipt.

  d) **Send Back** – Auto populating the name of the employee from whom the receipt was received.

  e) **Reporting Officer** – Auto populating the user's reporting officer name.

  f) **Group** – Adding all or selective users from a group of employees already created by the user who has forwarded. This is visible/can be used only for **'CC'**, since receipt can be forwarded to only one user in **'To'**.

- **Intimate To –** This allows user to intimate all or selective employees/users already in channel of submission/movement of the receipt, about the current forwarding movement. This can be done via SMS and e-mail.

Note:

- The **copy (CC)** of the receipt number generated is on the following pattern: **Sequence Number (Copy number)/Year/Section-Code**. For example, 101(2)/2020/Parliament Section.

  Sequence number - 101
  Copy number - 2
  Year of Creation - 2020
  Section/Office - Parliament Section

Receipt Sent List

The **Sent** box displays the list of receipts (**Electronic** and **Physical**) sent/forwarded by the user to other users in the system. It keeps a record of all the receipts sent so far and other details such as the date and time on which it was forwarded, the person to whom it was forwarded along with remarks etc. if any. May please refer below for more details –

To view list of receipts sent, Click **'Sent'** under **Receipts** module. (**Figure 125**)

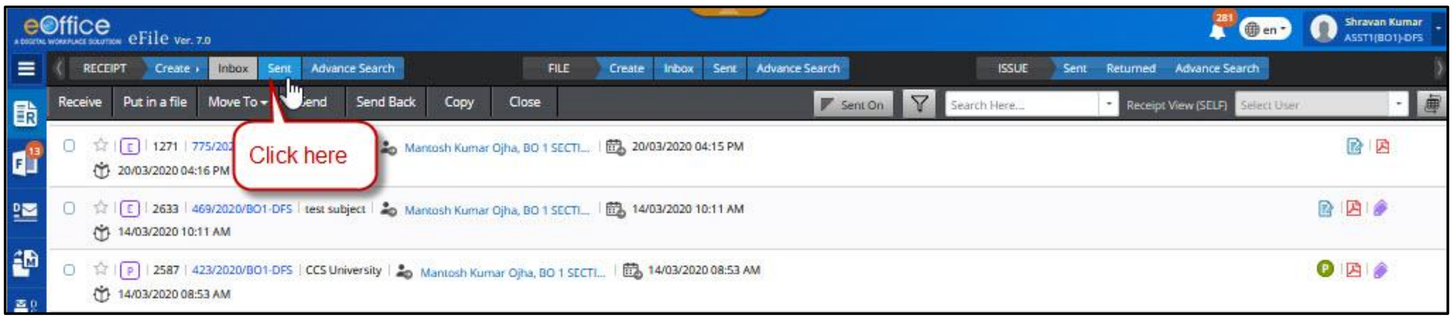


Figure 125

Description:

- The **Sent** list of receipts displays information such as, Nature of Receipt (E/P), Computer No., Receipt Number, Subject, Subject Category, Sender Name (*Sender of the DAK/Letter*), Sent To, Sent On, Due On, Remarks and Actions.

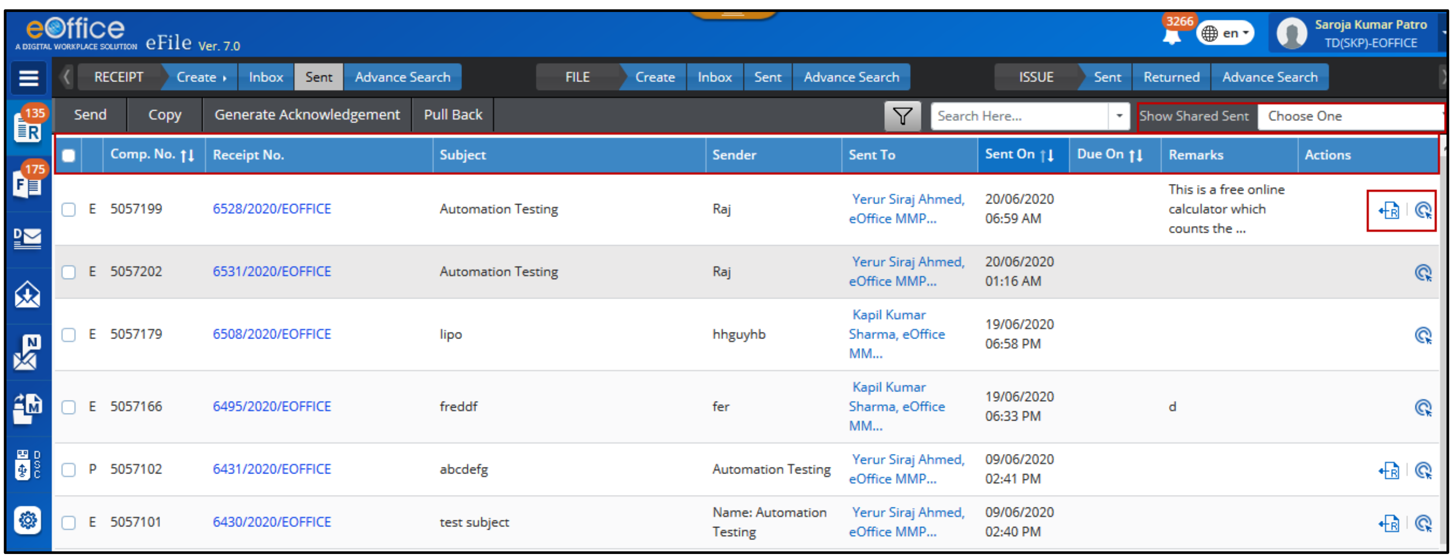


Figure 126

- The list of receipts can be sorted based on **Computer No.**, **Sent On** and **Created On** by clicking on column heads.

- The list of receipts can be **filtered** on the basis of **Nature**, **Subject Category**, **Sent Date** and **Due Date** range by clicking Filter Icon in menu bar.

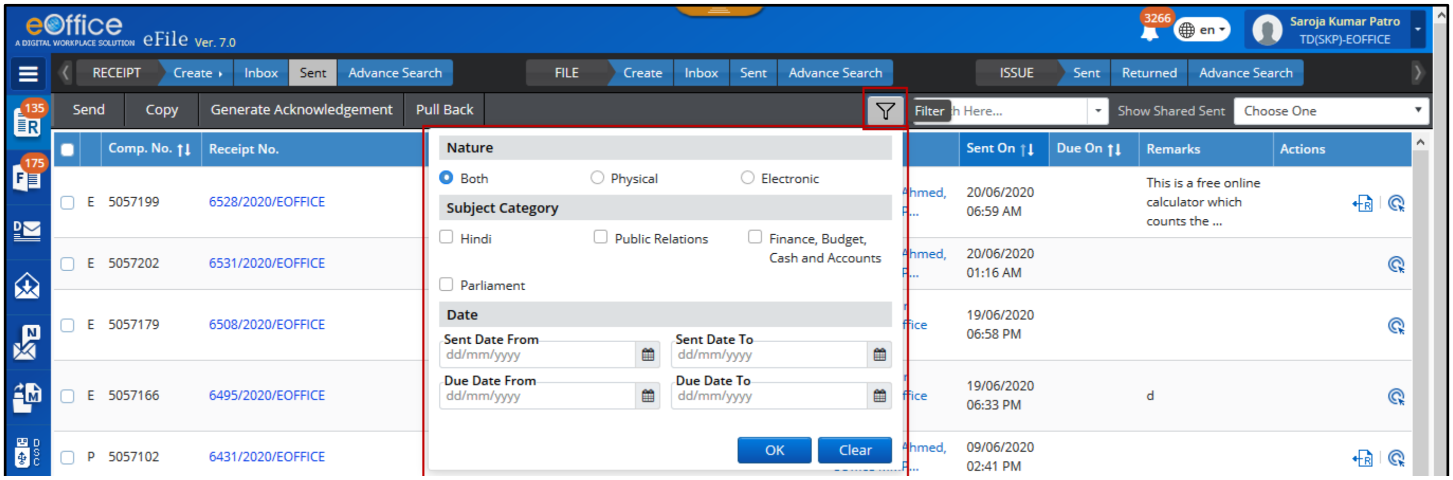


Figure 127

- The receipts can be searched using Module Search on the basis of **Computer No.**, **Receipt No.**, **Subject, Sender, Sent To** and **Remarks**, by entering at least 3 characters.

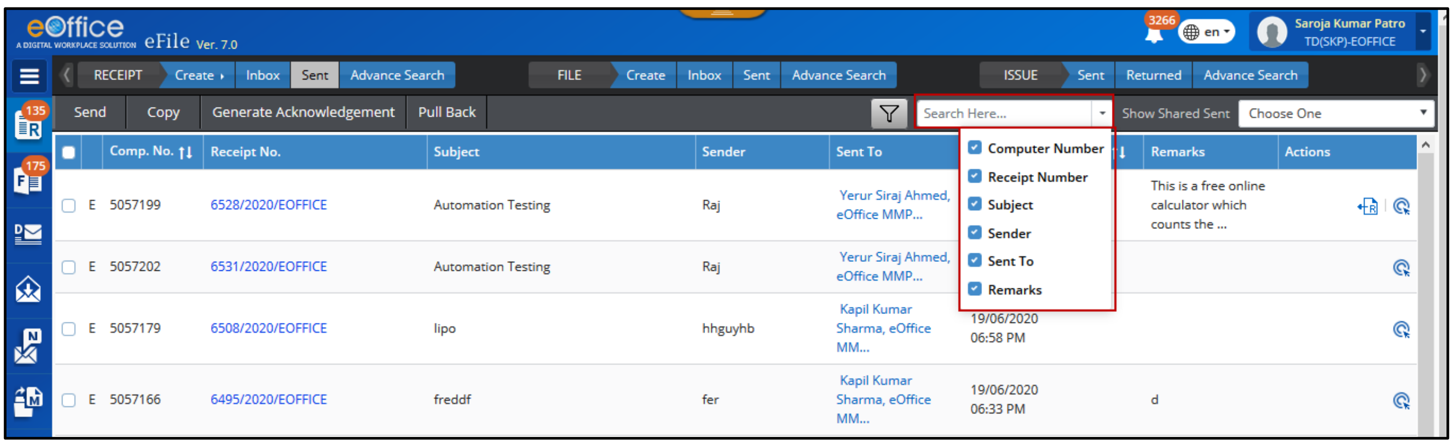


Figure 128

- The list of already sent receipts of **other users** if shared with you (in case of employee's handover due to transfer/superannuation/promotion)can be viewed through **Show shared Sent**.

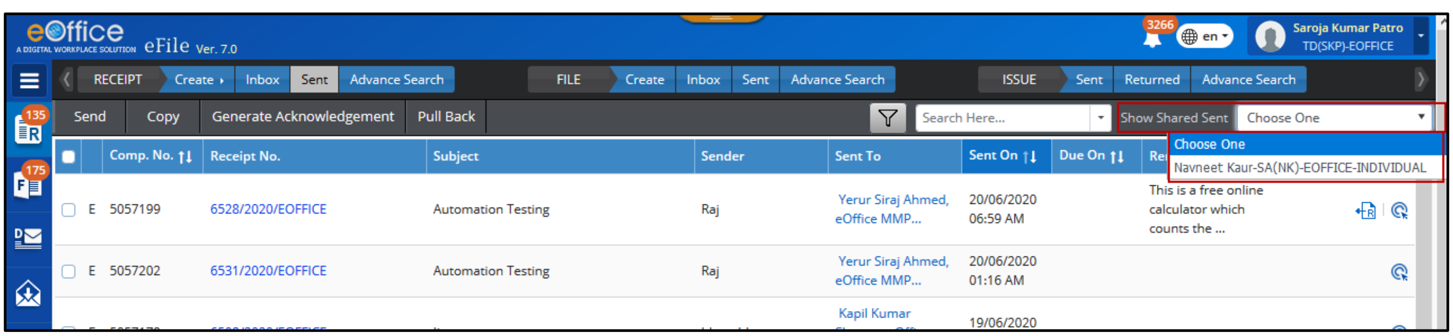


Figure 129

The following actions that can be performed on the list of Sent receipts –

- **Send**,
- **Copy**
- **Generate Acknowledgement,**
- **Pull Back**
- **Initiate Action**

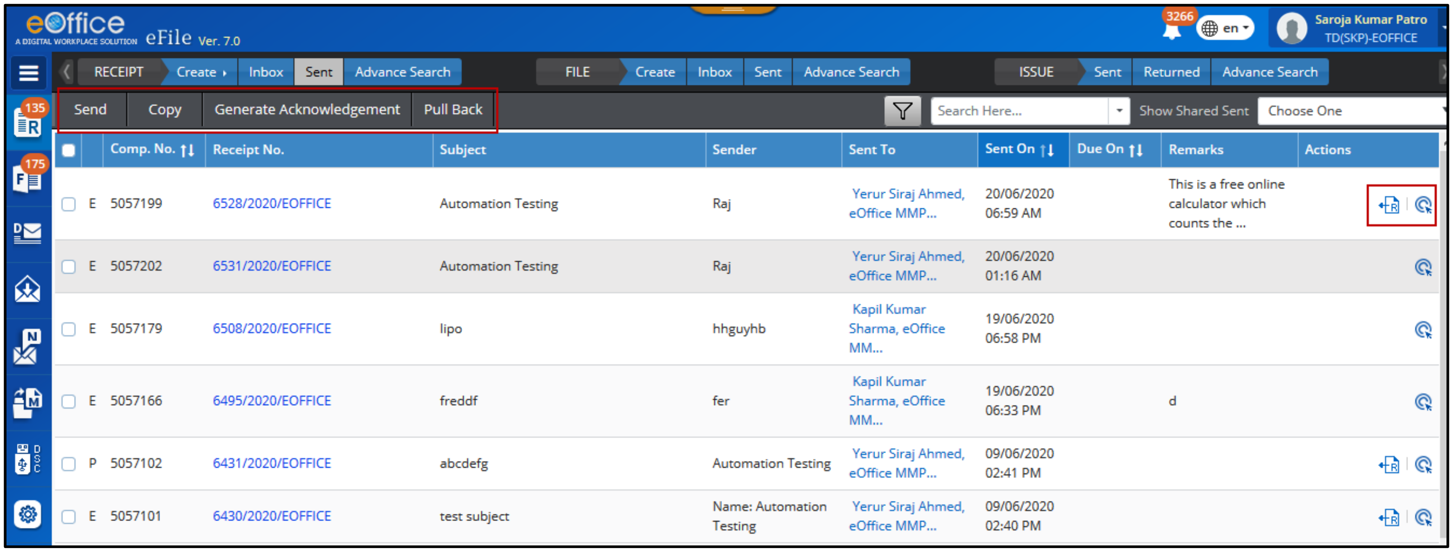


Figure 130

- Further, more details on a receipt such as its diarized letter and other information can be viewed by clicking on the **Receipt No**.

Receipt Pull Back

To 'Pull Back' a receipt is to call it back from the user to whom it was marked by the user, before it reaches in their hands. This may be required in case-scenarios where user forwards the receipt to an unintended person mistakenly, or the person is un-available so the subject matter (receipt) may be pulled back and re-assigned to someone else. This can only be done until the recipient has received or opened the receipt. This section describes the steps to pull back a receipt.

Important Points:

- ✓ Only unread (eReceipt) or un-received (pReceipt) receipts can be pulled back.
- ✓ **'Pull Back'** movement is recorded in the movement details of the receipts.

STEPS TO FOLLOW:

1. Go to **'Sent'** box.
2. Click **'Pull Back'** Icon under **'Actions'** column corresponding to the receipt number to be pulled back.

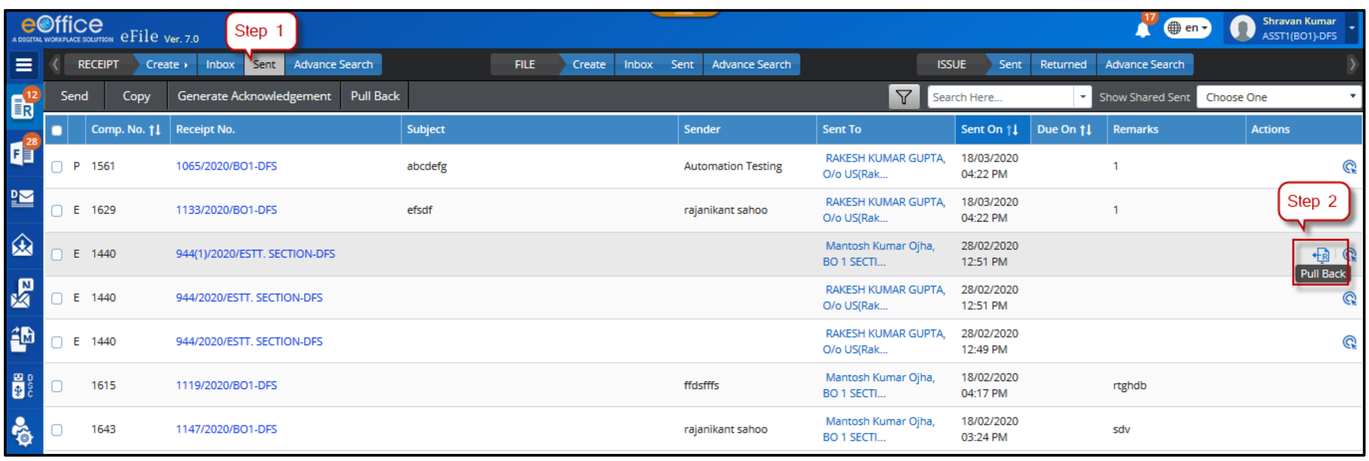


Figure 131

3. Enter the mandatory **'Pull Back' Remarks** and Click **'OK'** in the confirmation pop-up box.

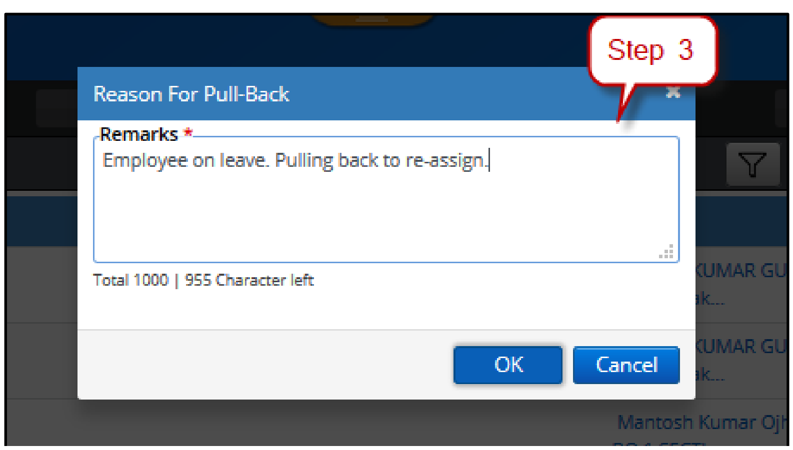


Figure 132

STEPS TO PULL BACK MULTIPLE RECEIPTS

1. Go to **'Sent'** box.
2. Select multiple receipts (eligible) to **Pull Back**.
3. Click **Pull Back** menu in the menu bar.

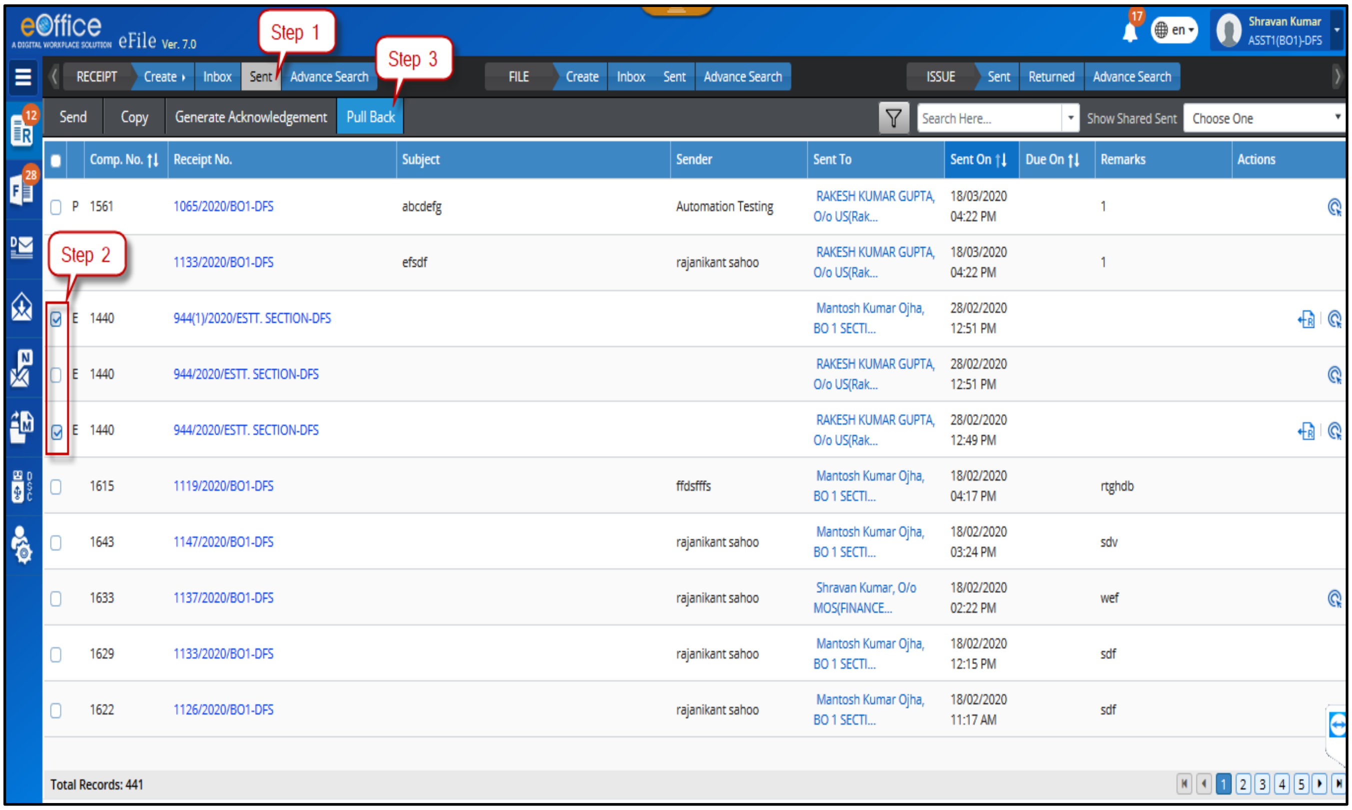


Figure 133

4. Enter the mandatory***'Pull Back'** remarks and Click **'OK'** in the confirmation pop-up box.

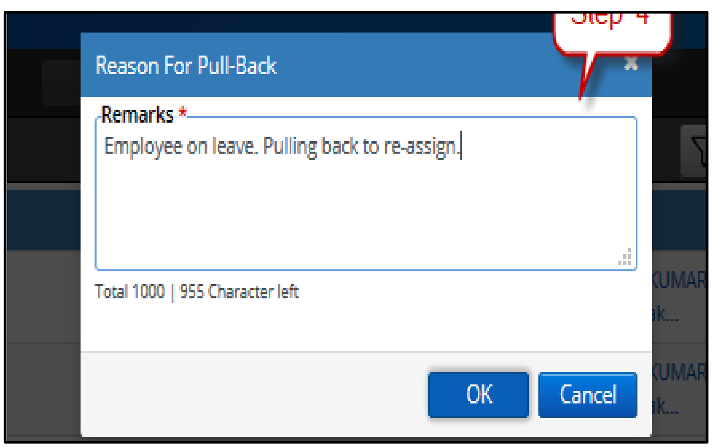


Figure 134

STEPS TO PULL BACK RECEIPTS FROM ADVANCE SEARCH

1. Select the receipt(s) to pull back from the result of the Advance Search.
2. Click **'Pull back'** action button at the top.

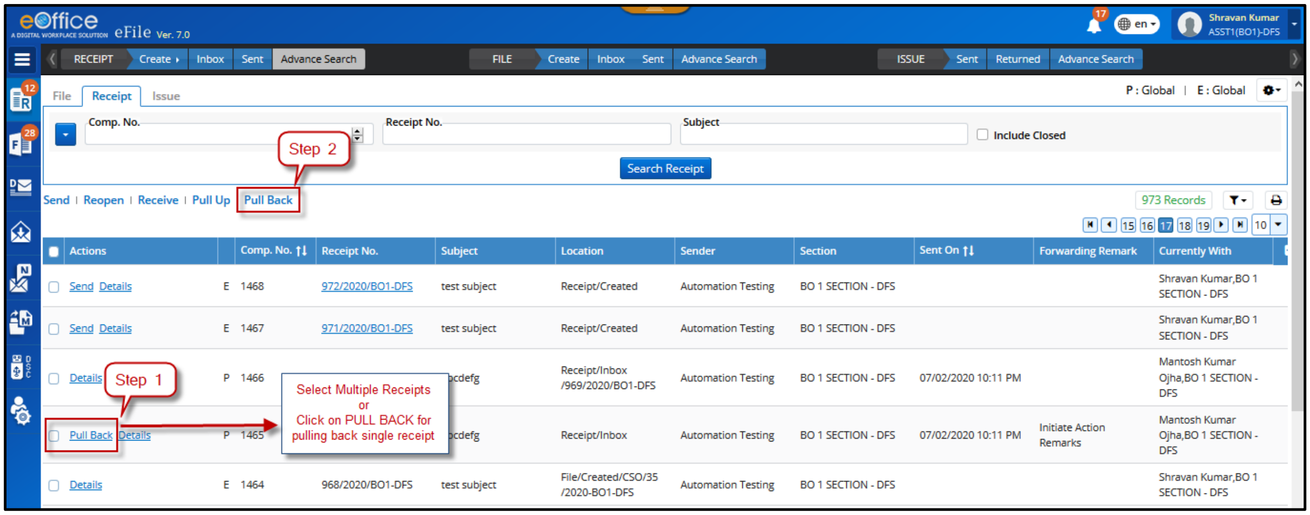


Figure 135

3. Enter the mandatory 'Pull Back' remarks and Click '**OK**' in the confirmation pop-up box.

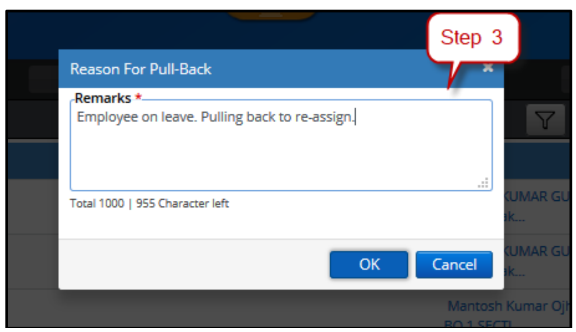


Figure 136

Note:

- The pulled back receipts will be moved to the respective folders from which it was sent(Inbox/Inbox Folder/Created).

Receipt Pull up

This section describes the steps to pull up a receipt from Inbox/Inbox folders/Created list of users who are in same section/office, individual's hierarchy or as per the action scope defined in the system by the administrator. This may be required in case-scenarios, for example, where a person is un-available to process the subject matter (receipt) so it may be pulled up and re-assigned to someone else. Or, also in cases where it is immediately required. Pull up is irrespective of the fact whether the user forwarded the receipt or not.

Important Points:

- ✓ Receipts attached with other Files/Receipts cannot be pulled up.
- ✓ Closed receipts cannot be pulled up unless re-opened by the custodian.

STEPS TO FOLLOW:

1. Under Receipt View of the **Inbox/Inbox sub-folder/Created** list, choose **Section** or **Hierarchy** scope.

   Or

   Choose the user name under **Section** or **Hierarchy** scope, whose receipt you wish to pull-up.

Note:

- **Section** view gives collective list of all receipts available in the respective folder opened (Inbox/Inbox sub-folder/Created) of all users in one's section/office.
- **Hierarchy** view gives collective list of all receipts available in the respective folder opened (Inbox/Inbox sub-folder/Created) of all users in one's section/office.

2. Select receipts to be pulled up. (Multiple receipts can be pulled up by multiple selection)
3. Click the **'Pull up'** action button in the menu bar.

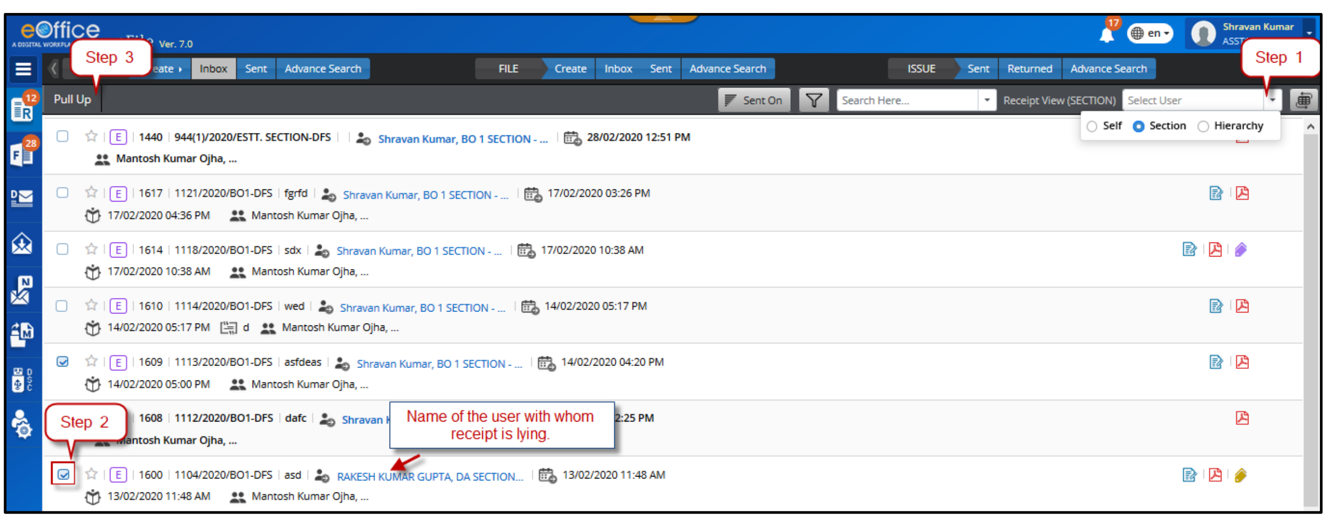


Figure 137

4. Enter the reason in mandatory* remarks **Pull up** in the pop-up box and Click '**OK**'
   Receipt(s) should now be available in **Inbox**.

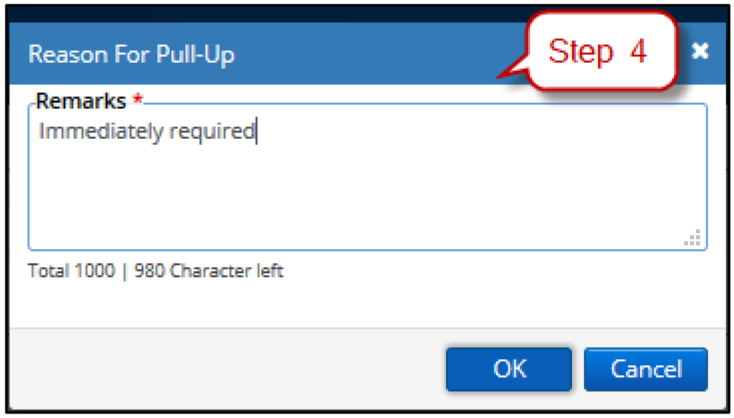


Figure 138

Steps to Pull up receipts from Advance Search

1. Select the receipts to pull up from the result of the Advance Search.
2. Click '**Pull up'** action button at the top.

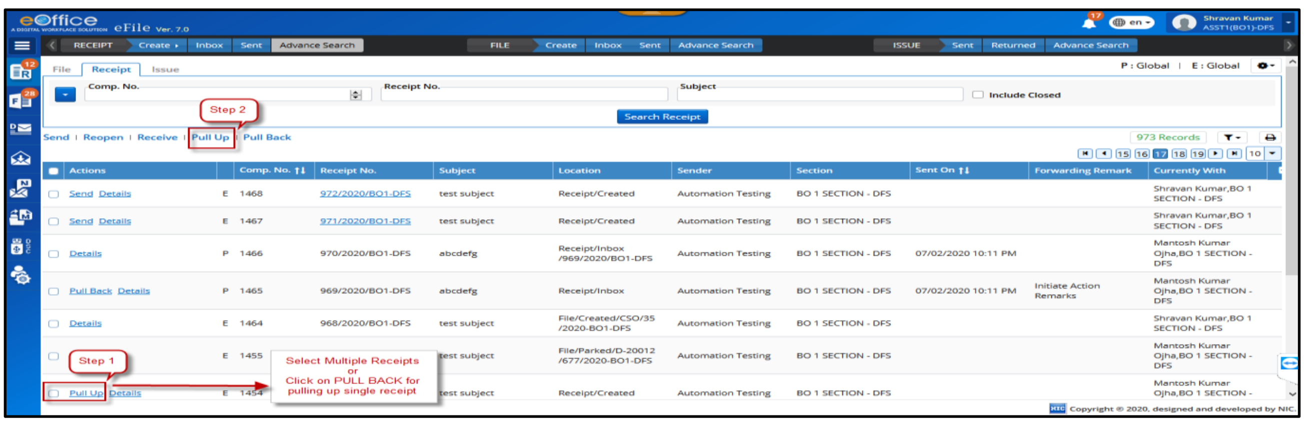


Figure 139

3. Enter the mandatory **'Pull up'** remarks and Click **'OK'** in the confirmation pop-up box.

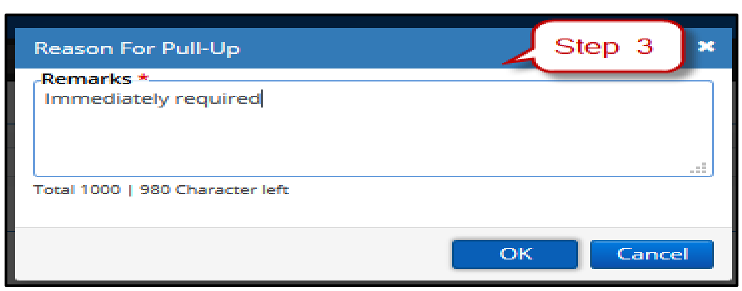


Figure140

Note:

- The Pull up movement will be added in movement history of Receipt with pull up remark.

Initiate Action (P/E)

The **'Initiate Action'** feature is useful when a user wishes to keep a check/follow-up on the actions taken place on a receipt when it is still in the movement of channel of submission without having to call back the receipt every time. This is called as '*initiating an action on a receipt*'.

The action can be initiated by a user for the receipts while forwarding them or for the ones which have been already sent. The recipients of such receipts (in the movement of the receipt) can then add their comments or record their inputs, which, cab be then reviewed by the initiator against every movement.

This feature is useful, in cases, for example, when the head of the organization/department receives a letter of important category, and plans to monitor the inputs of the employees towards the disposal of the letter, by reviewing their comments recorded at every movement.

'Initiate Action' primarily consists of –

1. **Initiating an Action** – Initiated against the receipt by the initiator for review **while forwarding**.
2. **Recording Comments/Action Details** – Users recording their comments with every movement **of receipt received with Initiated Action**.
3. **Review / Initiated Action Details**– Reviewing the comments recorded with every movement, **by the initiator**.
4. **Close Initiated Action** – The action initiated on a receipt can later be then closed, as required.

This section describes the process of initiating a cycle of actions while forwarding a receipt or on already sent receipt.

Important Points:

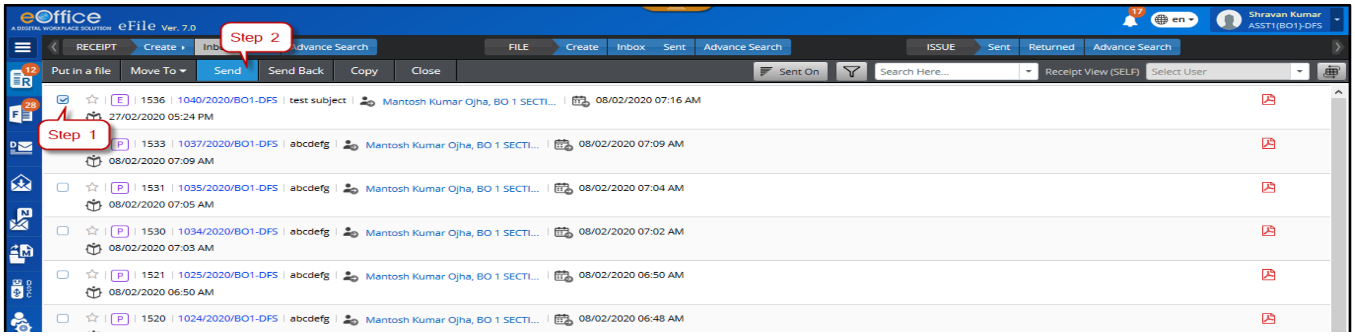
- ✓ Action on receipts in sent box, can only be Initiated for the ones in active state (not closed).
- ✓ Multiple Actions cannot be initiated on a receipt, only one at a time.
- ✓ Initiate action is a configuration-based feature. Available, if the configuration is enabled.
- ✓ After enabling configuration, user must have necessary privilege/role to use this feature

Initiate Action

STEPS TO FOLLOW:

From Receipt Send Page

1. Select receipt(s) or click open a receipt from **Inbox/Inbox sub-folder/Created** list.
2. Click **'Send'** action button.



3. Enter the user details in **'To'** and/or **'CC'** field.
4. If necessary, you may assign **Due date**, **Action**, **Priority** to the receipt.
5. Select Initiate Action and Initiation Type.
6. Enter mandatory* **Remarks**.
7. Choose **Alerts** (if required) -

   Notify Through Email and/or SMS – To notify receiver(s) of the receipt via e-mail and/or SMS.

   Intimate To – To notify the users in the previous movement of the receipt about this current movement, via e-mail and/or SMS.
8. Click **'Send'** action button.

From Receipt Sent List

1. Click '**Initiate Action'** link/Icon under actions against the respective receipt in the Sent list.
2. Select Initiation Type in the **'Receipt Initiated Confirmation'** pop up box.
3. Provide mandatory***Remarks**.
4. Click '**OK**'.

Add Comments to Initiated Action

STEPS TO FOLLOW:

1. Click opens a Receipt from **Inbox/Inbox Sub-Folder**.
2. Click **Action Details** in the menu bar.
3. Click **Add Comment**.
4. Select the appropriate option in **Action Type** combo box.
5. Provide Action **Comments**.
6. Click **Add**.

Note:

1. Comments on a receipt cannot be recorded once the ACTION on receipt(s) is closed.

Review / Initiated Action Details

STEPS TO FOLLOW:

From Receipt Inbox

1. Click **Initiated Action** link under Receipt module.
2. Search the receipt using Search Parameters at the top.
3. Click '**Details'** icon under actions against the receipt number to view the recorded comments and other details.

From a Receipt Already Attached to a Receipt

1. Click opens a Receipt from Inbox/Inbox Sub-Folder/Created.
2. Click **Attach** tab of Receipt History in Receipt Inner Page.
3. Click **Action Details** link/Icon for receipt in Attached Receipts List.
4. Click **Add Comment** link in the Action Details pop up.
5. Select value from Action **Type** combo box.
6. Give Action **Comments**.
7. Click **Add**.

From a Receipt Already Attached to a File

1. Click opens a File from Inbox/Inbox Folder/Parked/Created.
2. Click **Details** menu on inner page of file.
3. Click **Attached** tab in File History.
4. Click **Action Details** link adjacent to Receipt in Attached Receipt List.
5. Click **Add Comment** link in the Action Details pop up.
6. Select value from Action **Type** combo box.
7. Give Action **Comments**.
8. Click **Add**.

From ToC list of a file in Inbox:

1. Click opens a File from Inbox/Inbox Folder/Parked/Created.
2. Click **ToC** link in Right panel of File Inner page
3. Click **Details** icon for receipt.
4. Click **Action Details** link.

5. Click Add **Comment** link in the Action Details pop up.
6. Select value from Action **Type** combo box.
7. Give Action **Comments**.
8. Click **Add**.

From Advanced Search Output:

1. Search receipt in **Advanced Search** module.
2. Click **Details** link in the search output entry.
3. Click **Action Details** link in the Movement Details pop up page
4. Click **Add Comment** link in the Action Details pop up.
5. Select value from Action **Type** combo box.
6. Give Action **Comments**.
7. Click **Add**.

Closing Initiated Action

STEPS TO FOLLOW:

1. Click **Initiated Action** link under Receipt module.
2. **Search** the receipt using Search Parameters at the top.
3. Click **CLOSE** icon under actions against the receipt number to view the recorded comments and other details.
4. Enter the **Remarks**
5. Click **OK**.

Closing of Receipts

A receipt may be required to close in case when –

1. No action is required and is for information purpose only
2. The action is complete and the case is ready to be disposed.

This section describes the process of closing receipts in Inbox/Inbox Folder/Created folder.

Important Points:

- ✓ Receipt(s) which have attached files/receipts cannot be closed, they must be detached first.
- ✓ Physical receipt in Inbox/Inbox Folder must be in received state.
- ✓ After closing the receipt, the status will change to '**Closed**'.
- ✓ No action can be taken on closed receipt except **'View**' and '**Reopen**'.

STEPS TO FOLLOW:

1. Select Receipt(s) from **Inbox/Inbox folder/Created** using check box or Click a receipt number in inbox.
2. Click **'Close'** menu.

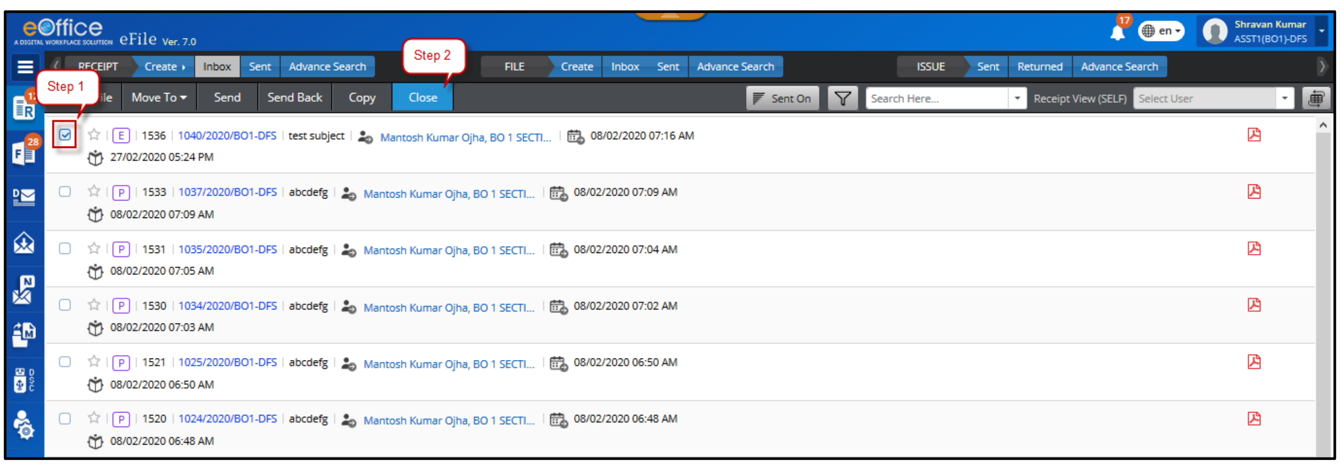


Figure 141

3. Give mandatory closing **remarks** and click **'OK'** in the Closing Confirmation pop up to close the selected receipt(s).

   Receipt should move from **Inbox/Inbox folder/Created** list to **Closed→ By Me** list.

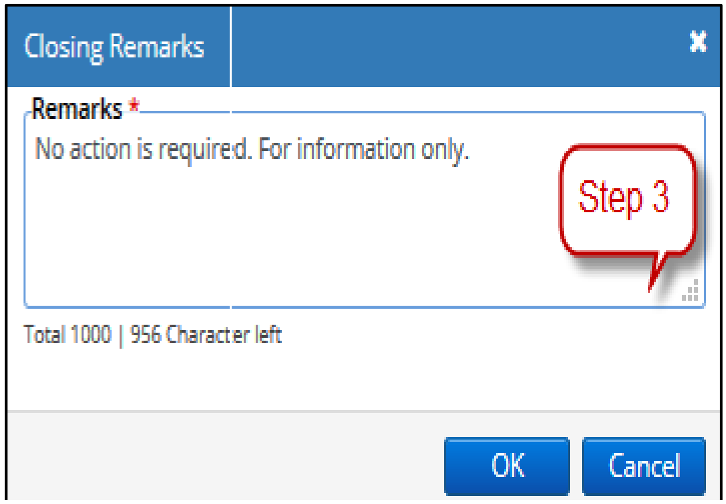


Figure 142

Alternatively, user can also click open the receipt from **Inbox or Created** by clicking on the receipt number. And then Click **Close** action button in the menu bar. ***(Figure 143)***

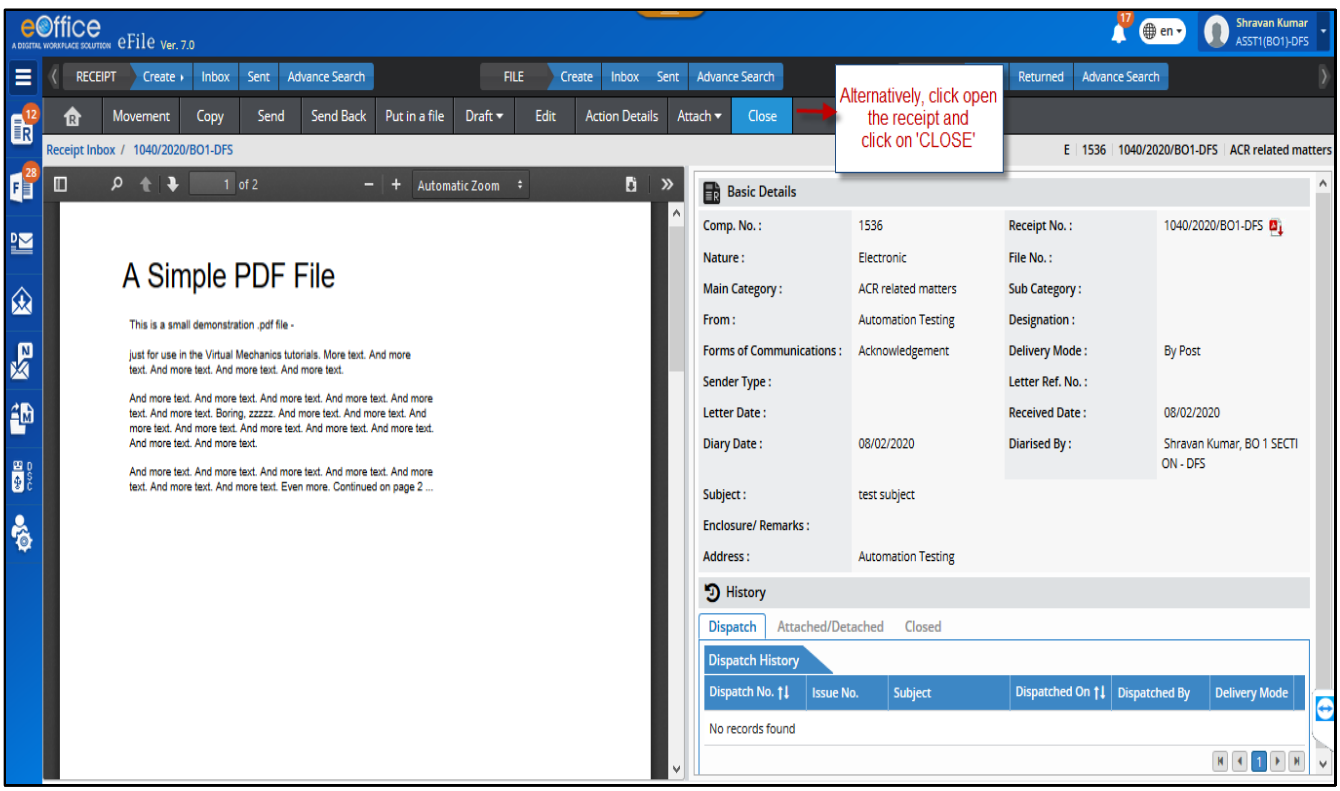


Figure 143

List of Closed Receipts

This section describes the different lists available to check the receipts which are in closed state.

STEPS TO FOLLOW:

1. Click '**Receipt**' module in navigation bar.
2. Click **'Closed**' folder.
3. Click '**By Me**' or '**By Others (Hierarchy)**' or '**By Others (All)**', as required. (Refer below for details).

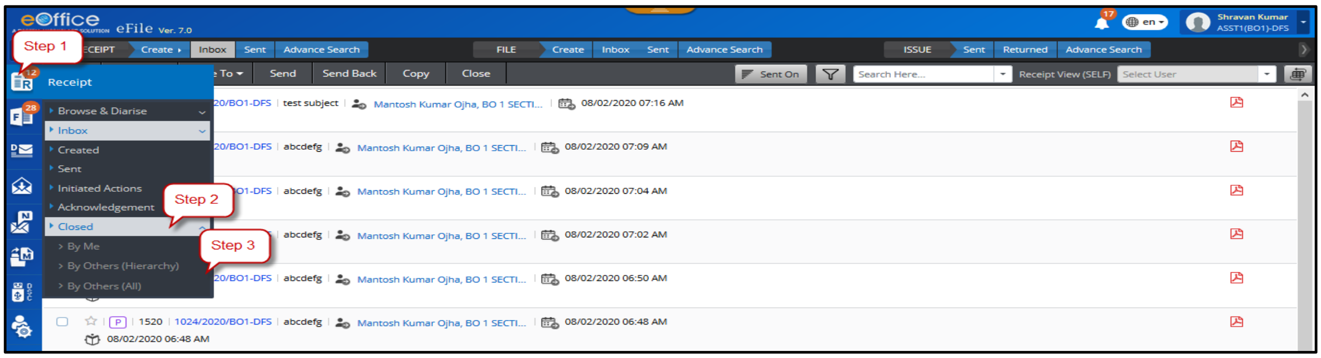


Figure 144

Closed (By Me) –

1. It displays the list of receipts closed by self.
2. User will not be able to take any action on receipts with closed state, except to view them and re-open.

   The user(s) can filter their list of Closed Receipts with help of various search options such as **Closing date range, Computer No., Receipt No**, **Subject**, **Remarks**, **Main Category**, **VIP Type** and **VIP Name**.

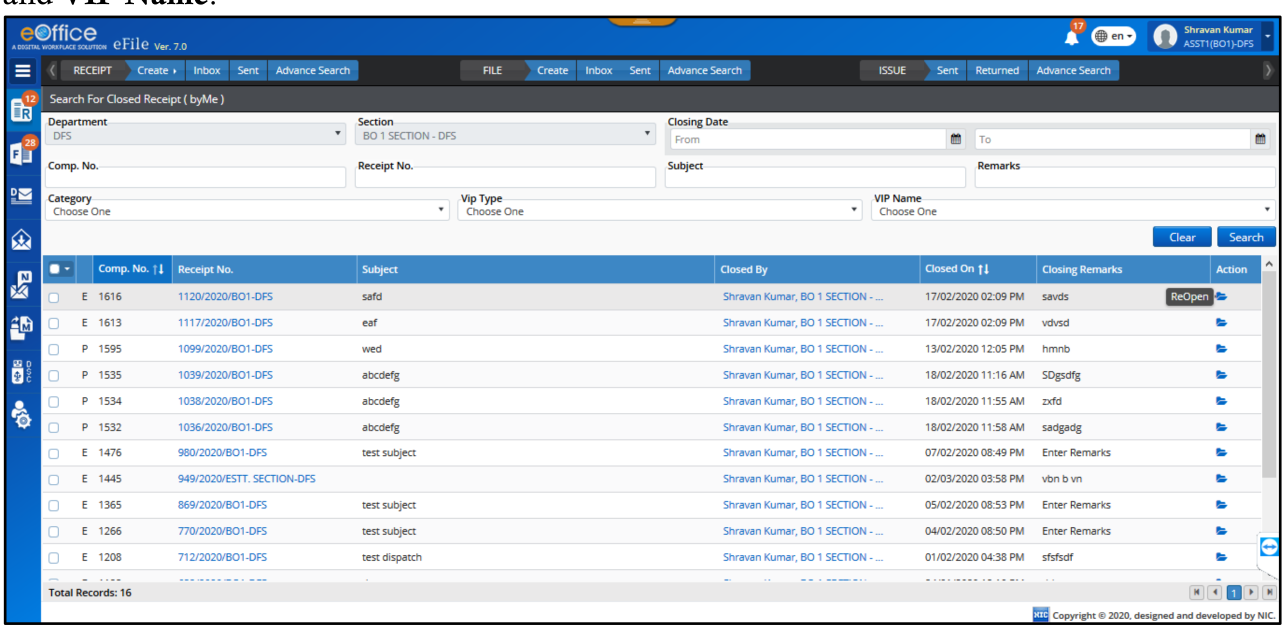


Figure 145

By Others (Hierarchy) –

1. It displays the list of receipts closed by others users in the viewer's hierarchy downline.
2. User will not be able to take any action on receipts with closed state, except to view them.
3. The user(s) can filter their list of Closed Receipts with help of various search options such as list of **Sections/Offices**, **Closing date range**, **Computer No.**, **Receipt No**., **Subject**, **Remarks**, **Main Category**, **VIP Type** and **VIP Name**.

> **Note:**
>
> - Users with role **'Role_Closed_By_Others_Hierarchy'** will only be able to see this list.

By Others (All)

1. It displays the list of receipts closed by others users in the viewer's hierarchy down line.
2. User will not be able to take any action on receipts with closed state, except to view them.
3. The user(s) can filter their list of Closed Receipts with help of various search options such as list of **Sections/Offices**, **Closing date range**, **Computer No.**, **Receipt No**, **Subject**, **Remarks**, **Main Category**, **VIP Type** and **VIP Name**.

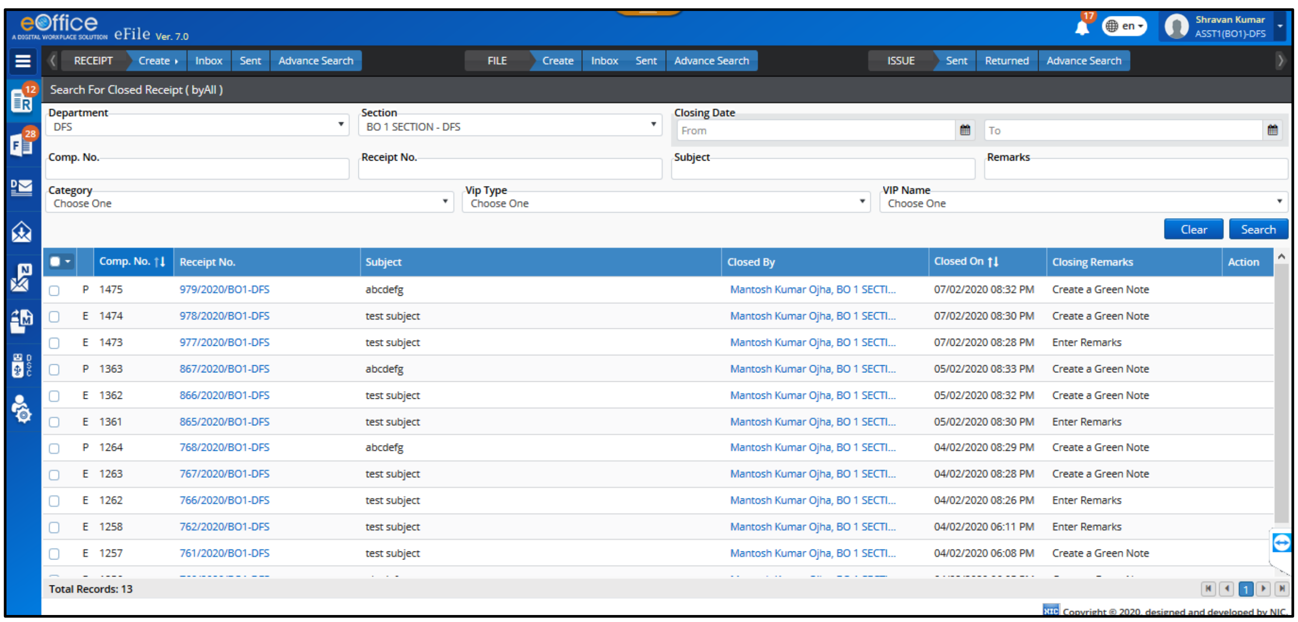


Figure 146

> **Note:**
>
> - Users with role 'Role_Closed_By_Others_All' will only be able to see this list.

Closed Receipt History:

'Closed Receipt History' provides the details about the number of times the receipt was closed and re-opened. These details include the type of action taken place (close/re-open), action taken by user details, action taken date and its remarks for the action.

STEPS TO FOLLOW:

1. Click opens a receipt from Inbox/Inbox folder/Created/Sent/Closed.

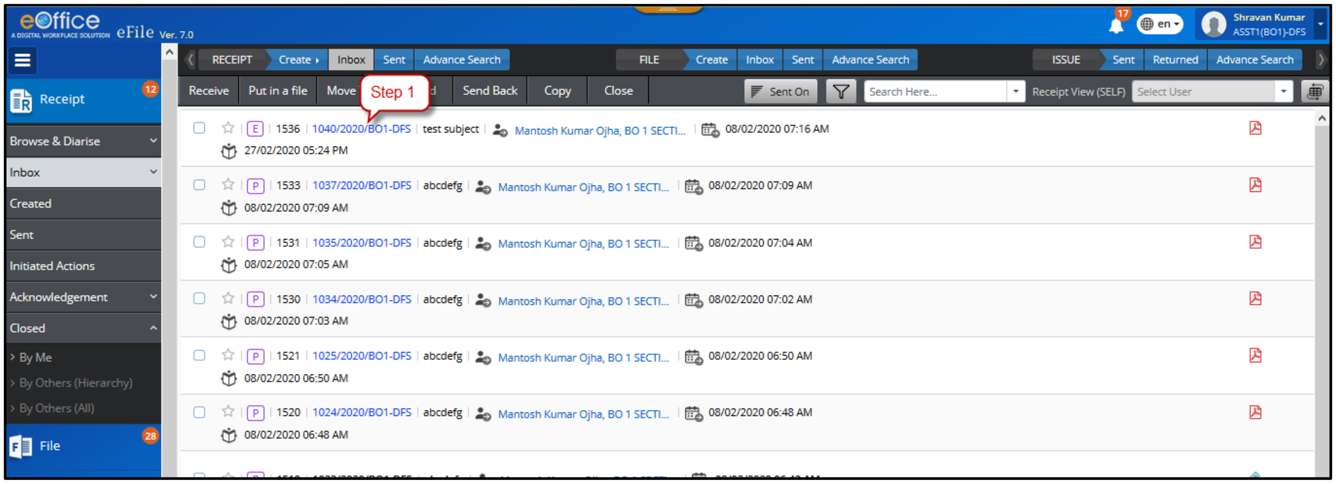


Figure 147

2. Click **Closed Tab** under History details.

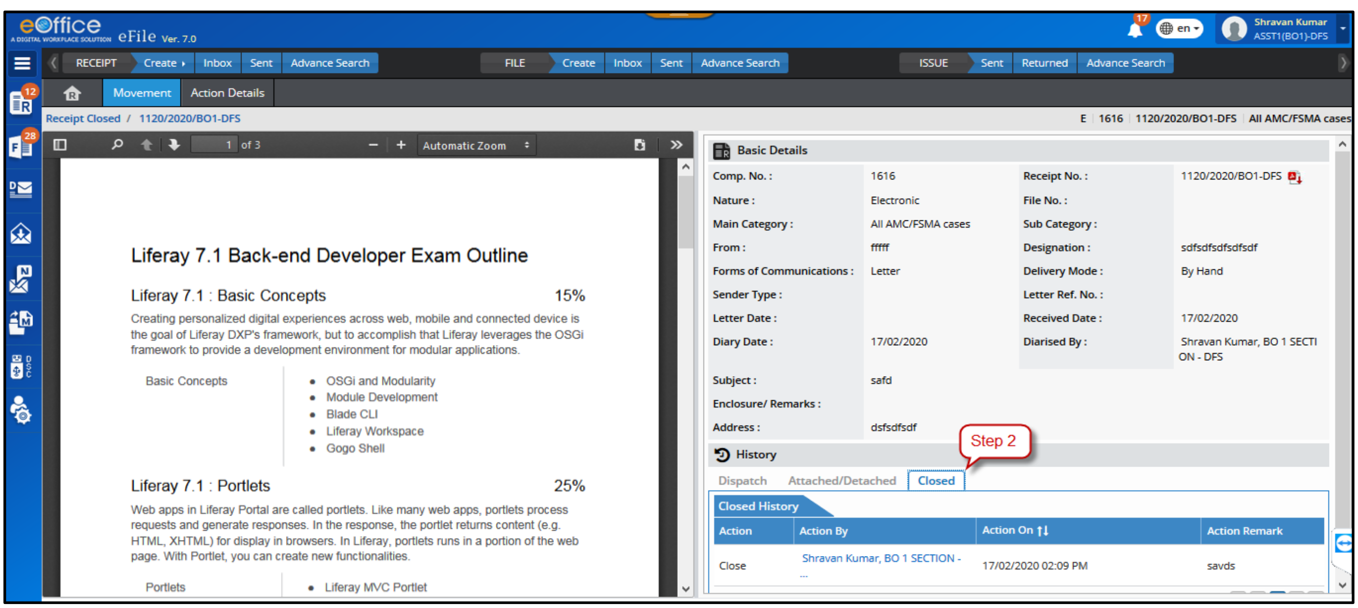


Figure 148

Note:

- The Closed tab displays the action details such as **Close** or **Reopen** performed by user, action date and time, and its action remarks.
- Most recent action is visible on the top of the list.
- Receipt with no closing history has no information in closed receipt history.

Re-opening of Receipts

The re-opening of the receipt is required often in cases where an already closed subject matter is now required to be reopened for further processing. This section explains the steps to re-open a receipt.

STEPS TO FOLLOW:

1. In **Closed→ By Me** list, Click Reopen icon at the end of the receipt record.

   Or

   Click opens the receipt from **Closed→ By Me** list and Click '**ReOpen**' action button.

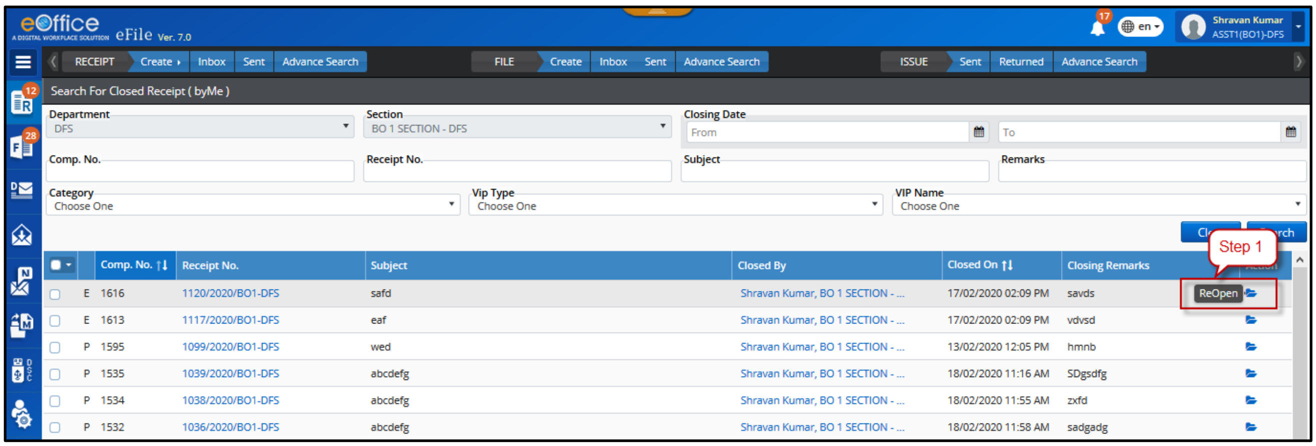


Figure 149

2. Enter the mandatory* '**Reopening Remarks**' in the pop-up box and click '**OK**' button.

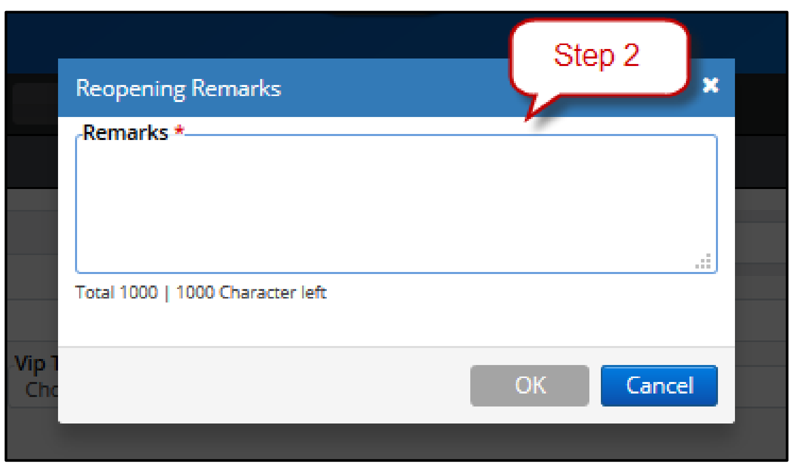


Figure 150

Note:

- State of the receipt will be changed to **Active**.
- Receipt will move to **Inbox** from **Closed**.

Generate Acknowledgement

An acknowledgement letter is a document used to formally acknowledge the receipt of DAK/Letter received. For example, acknowledging the receiving of an invoice, RTI application or any VIP correspondence. This section describes the process of generating an acknowledgment while diarizing a DAK/Letter or after it was diarized.

Generate Acknowledgement

Generating Acknowledgement while Diarisation

This section describes the process of creating an acknowledgement against an inward correspondence while simultaneously diarizing it.

STEPS TO FOLLOW:

1. On the receipt diary screen, select **Personalize Acknowledgement** check box. (Refer for steps for Diarisation of Dak/Letter).

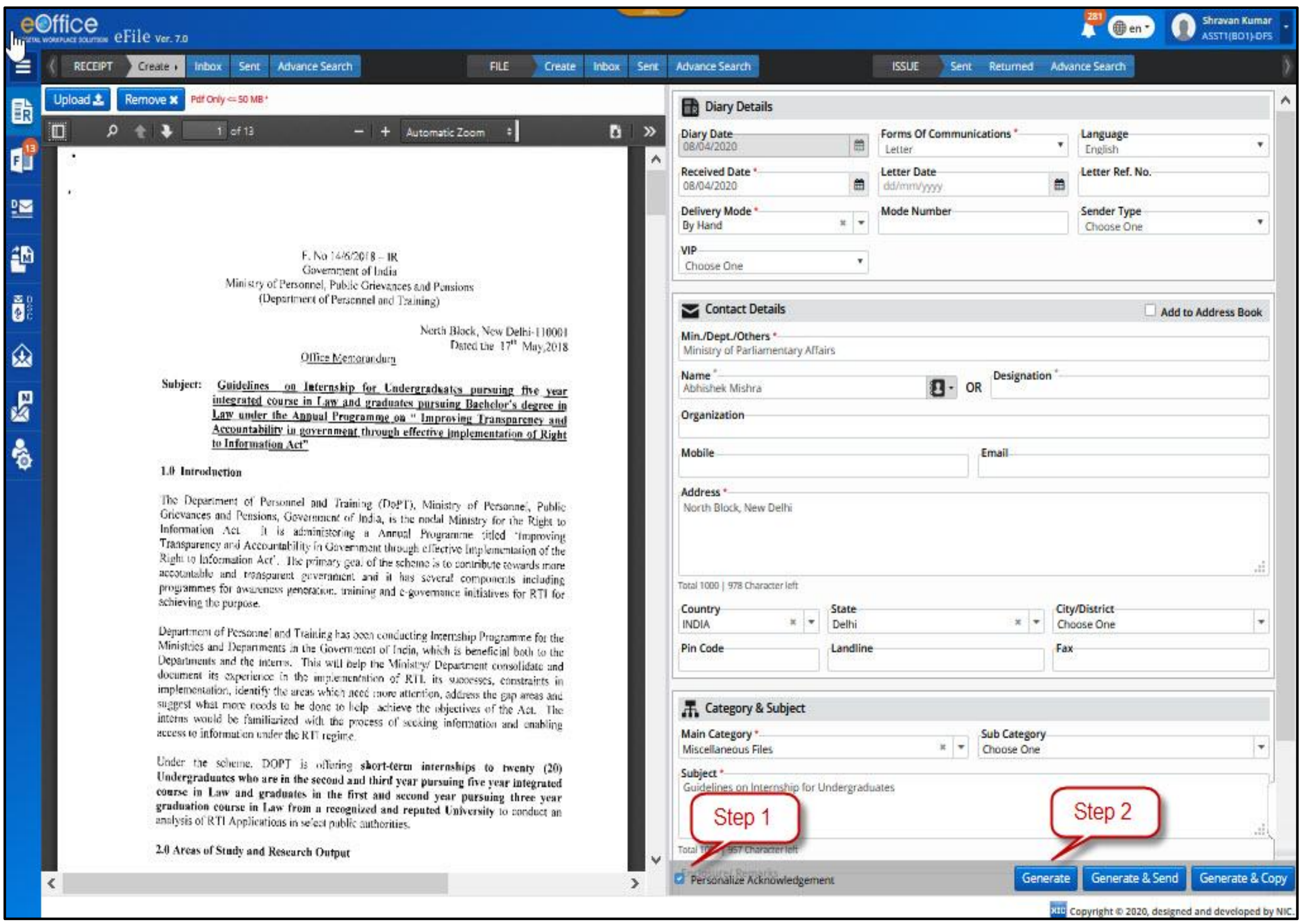


Figure 151

2. Click **'Generate'** to create the receipt and display acknowledgement creation page.

Note:

- Upon clicking **'Genera**te' the receipt is generated and available in **Created** box and the next screen visible is to generate the acknowledgement.

Or

Click **'Generate & Send'** to create the receipt and forward it to the concerned user. After the receipt is forwarded, **'Acknowledgement creation page'** is displayed.

3. Prepare the content of the acknowledgement.

Note:

- List of templates can be managed with pre-defined formats which can be selected and used for preparing acknowledgements.

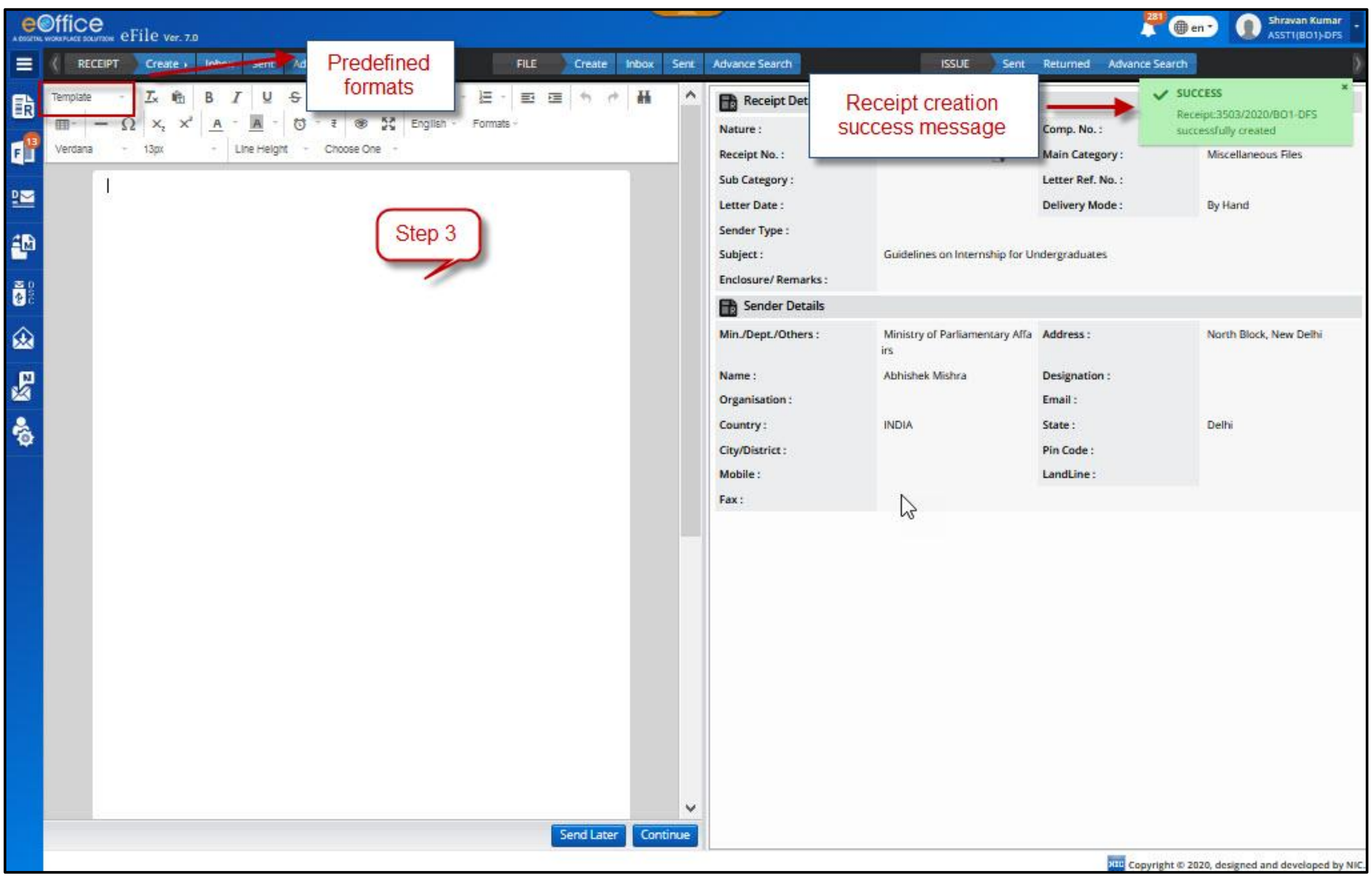


Figure 152

4. Click '**Send Later'** to save the acknowledgement in **Receipts→Acknowledgement→Created** to dispatch/send it later or Click **'Continue'** to generate the acknowledgement and further to initiate dispatch.

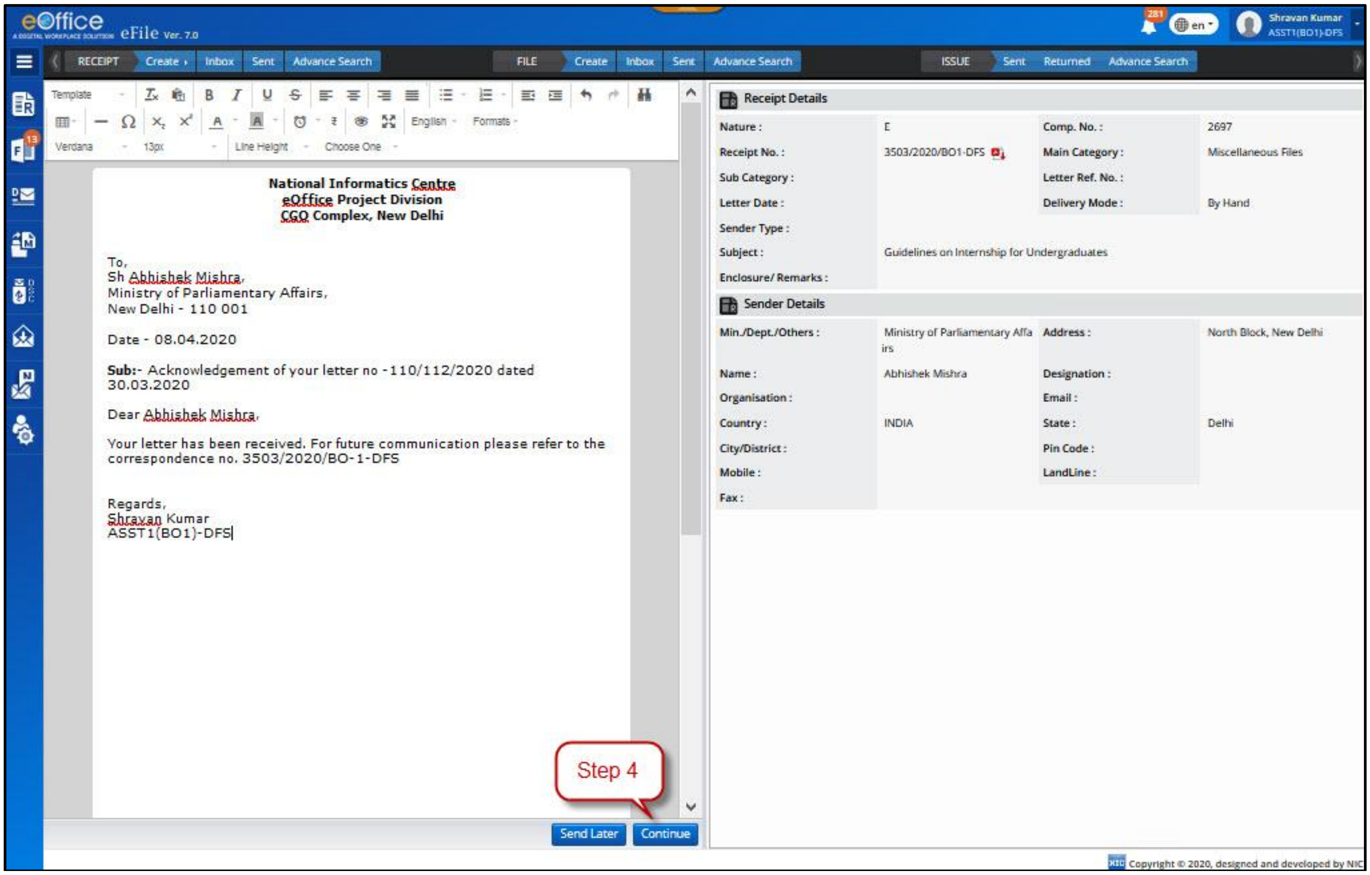


Figure 153

Generating Acknowledgement from Receipt Created/Sent

This section describes the process of creating an acknowledgement against a receipt which is already diarized i.e. available in created and sent box.

STEPS TO FOLLOW:

1. Select a receipt or click open from receipt's **Sent/Created** box.
2. Click **'Generate Acknowledgement'** to display acknowledgement creation page.
3. Prepare the content of the acknowledgement.

> **Note:**
> - List of templates can be managed with pre-defined formats which can be selected and used for preparing acknowledgements.

4. Click '**Send Later'** to save the acknowledgement in 'Receipts-> Acknowledgement-> Created' to dispatch/send it later.

Or

5. Click **'Continue'** to generate the acknowledgement.

Acknowledgement Created List

Describes the process of checking the list of already created acknowledgements and not sent so far.

1. Click **Receipts** module in the navigation bar.
2. Click **Acknowledgement**.
3. Click **Created under Acknowledgement**.

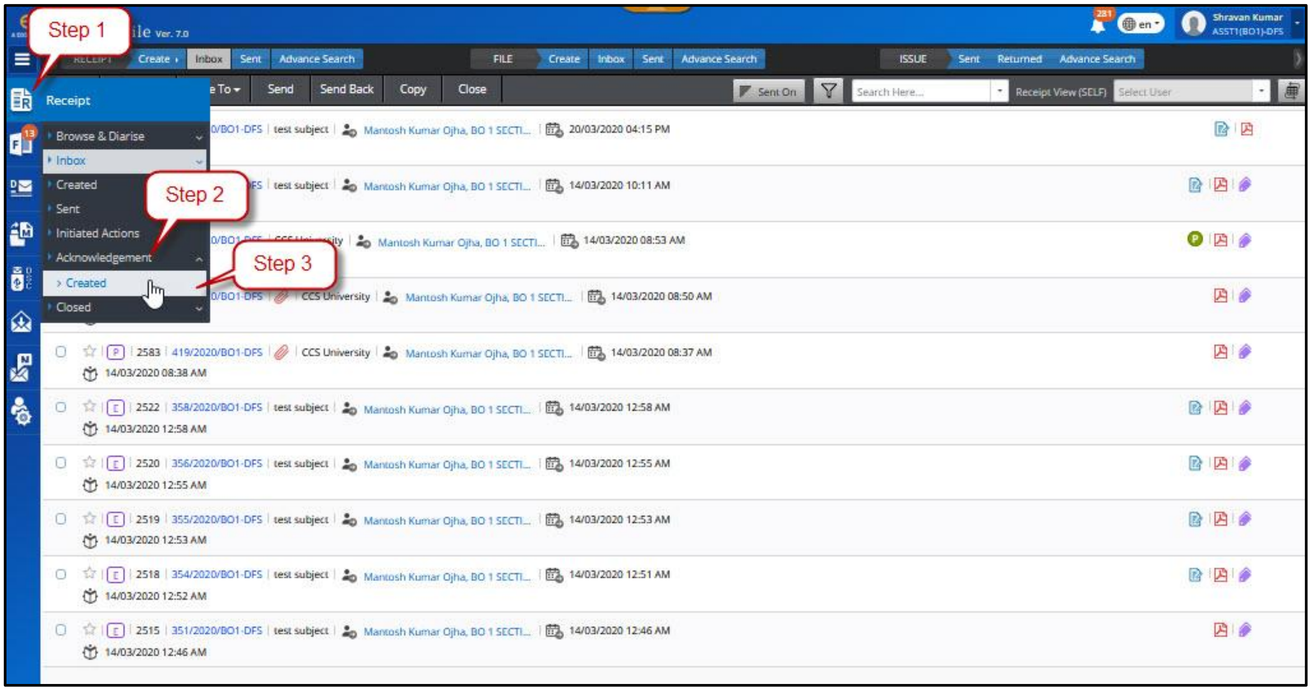


Figure 154

Description – Acknowledgement Created List

- In the list of acknowledgements created, user can see the acknowledgement numbers, the computer number and the receipt number against which it is created, Subject, Subject category and the date on which it was created.

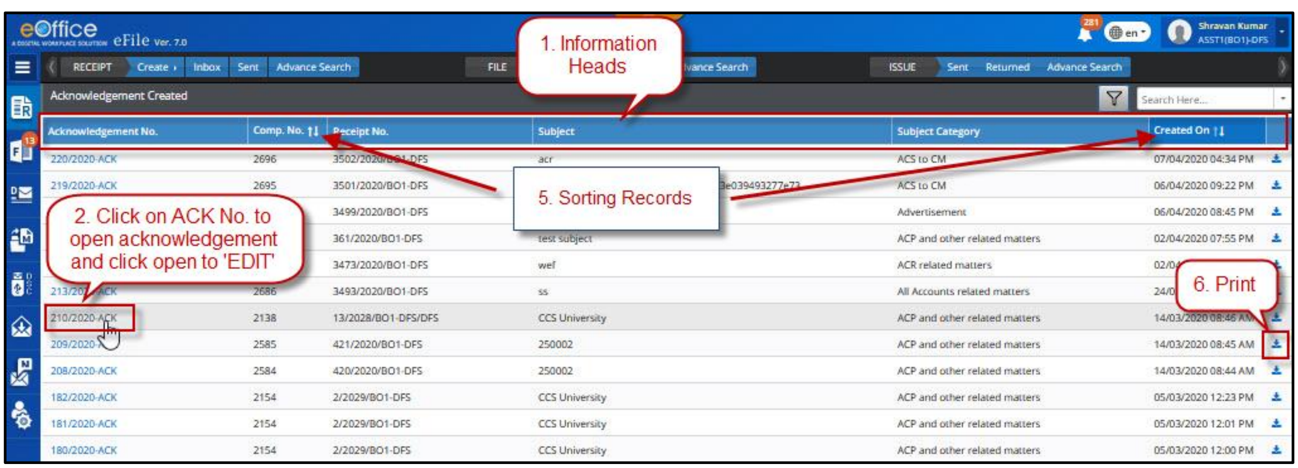


Figure 155

- To view the acknowledgements user can click the acknowledgement numbers.

- The list of acknowledgements can be filtered base on creation date range.

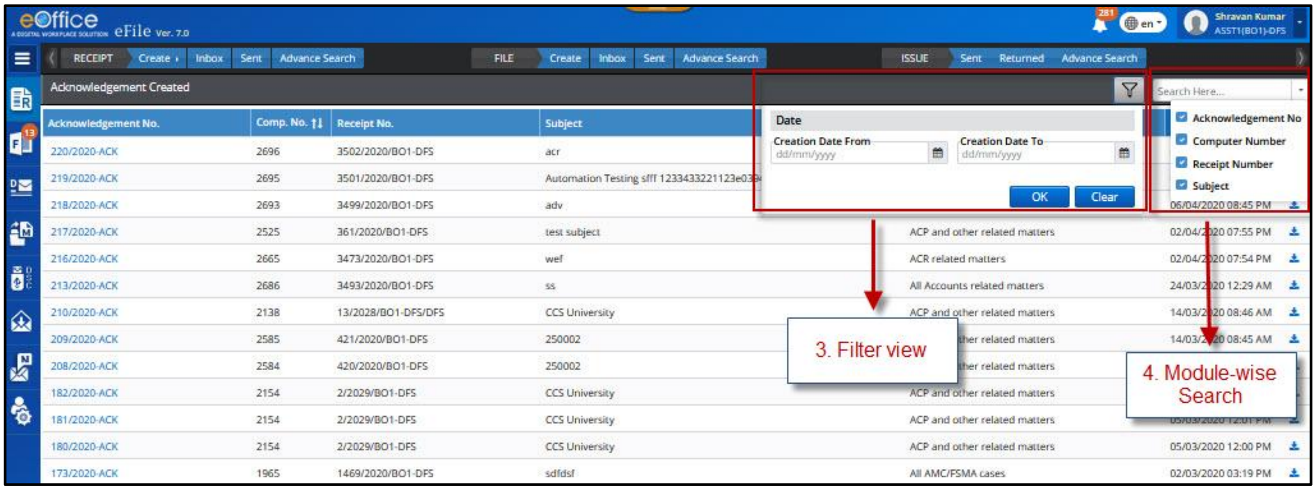


Figure 156

- Acknowledgements can be searched in module wise search base on acknowledgment numbers, computer number, receipt number and subject.
- The list can also be sorted based on computer number and the creation date by clicking on the column headers.
- Users can action on acknowledgments such as 'Edit' and taking 'Print' of the acknowledgement.

Edit Acknowledgement

Describes the process of editing a previously created acknowledgement in the Created list of Acknowledgement.

STEPS TO FOLLOW:

1. In the **'Receipts'** module, Click **'Created'** under **'Acknowledgement'**.

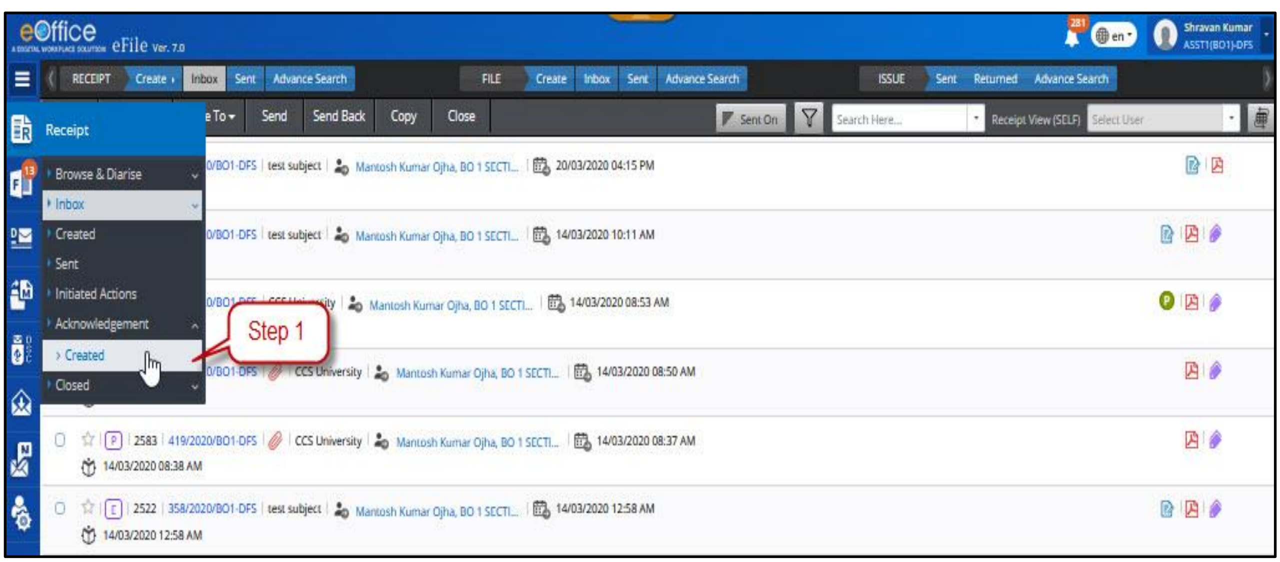


Figure 157

2. Click the acknowledgement number, required to edit.

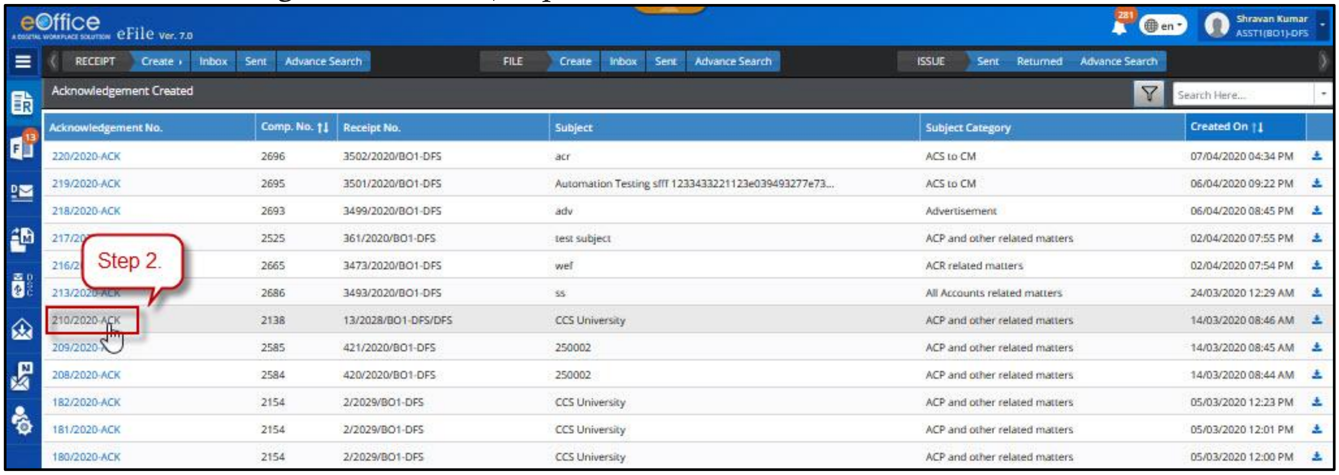


Figure 158

3. Click **'Edit'** action button to modify the content of the acknowledgement.

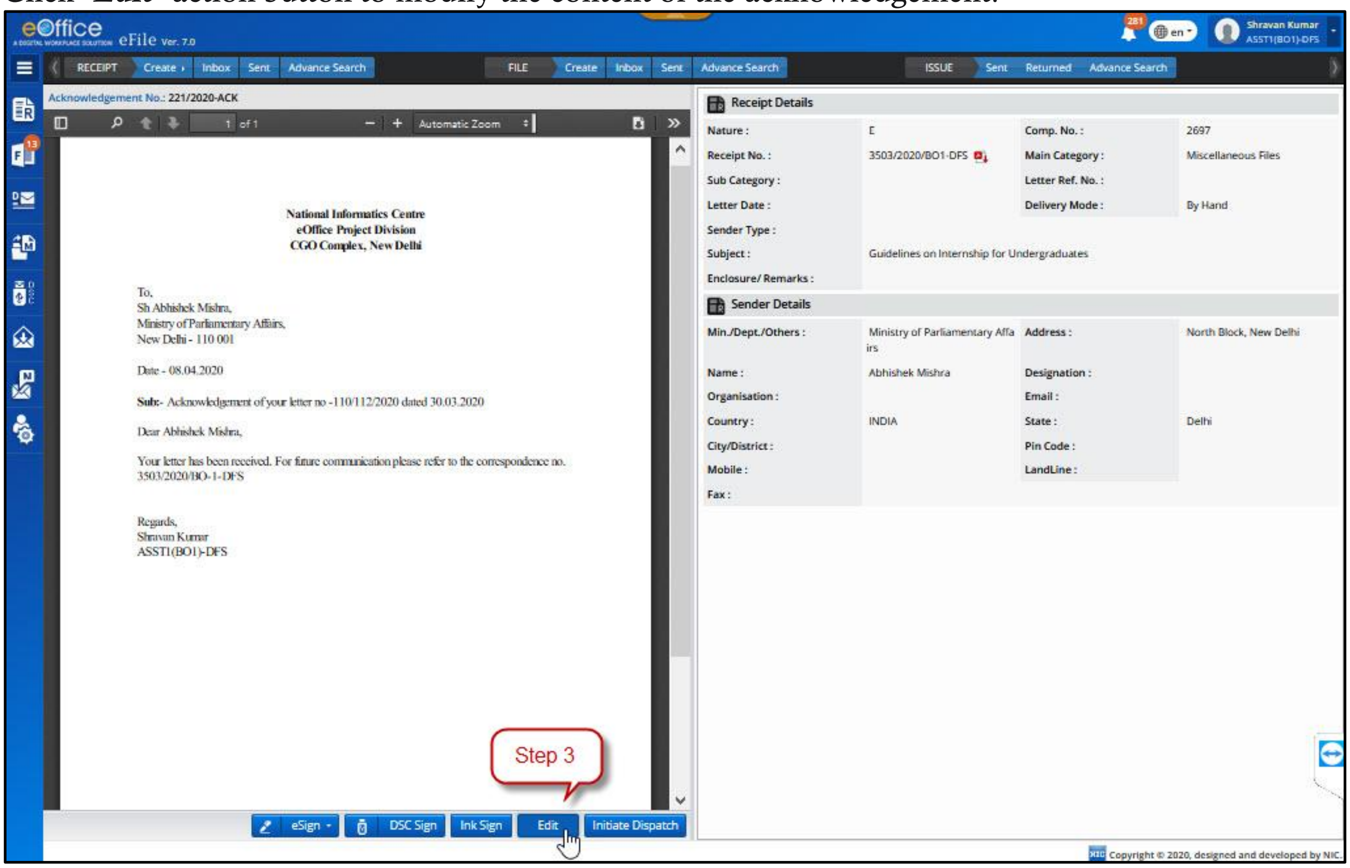


Figure 159

4. Click **'Continue'** to update the changes.

Note:

- A signed acknowledgment cannot be edited.

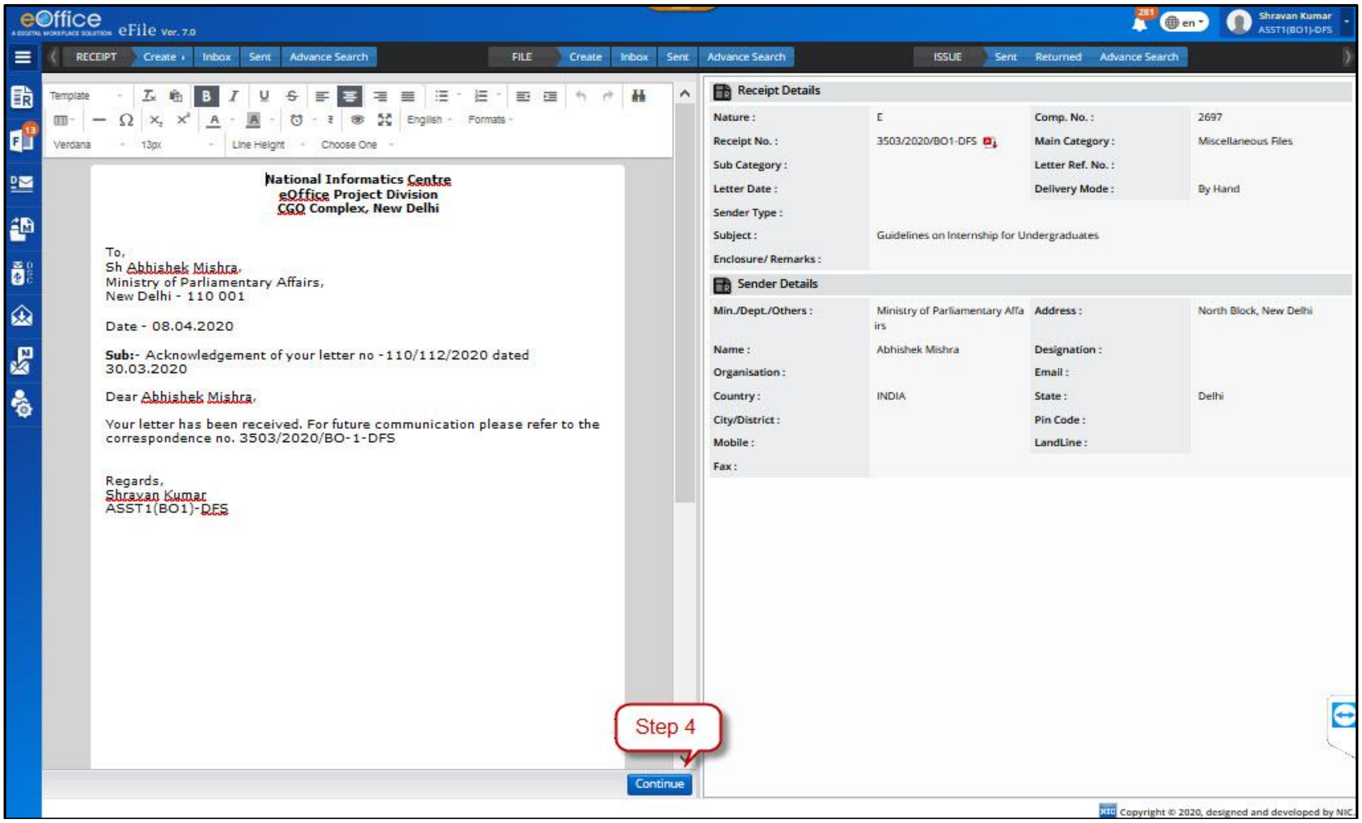


Figure 160

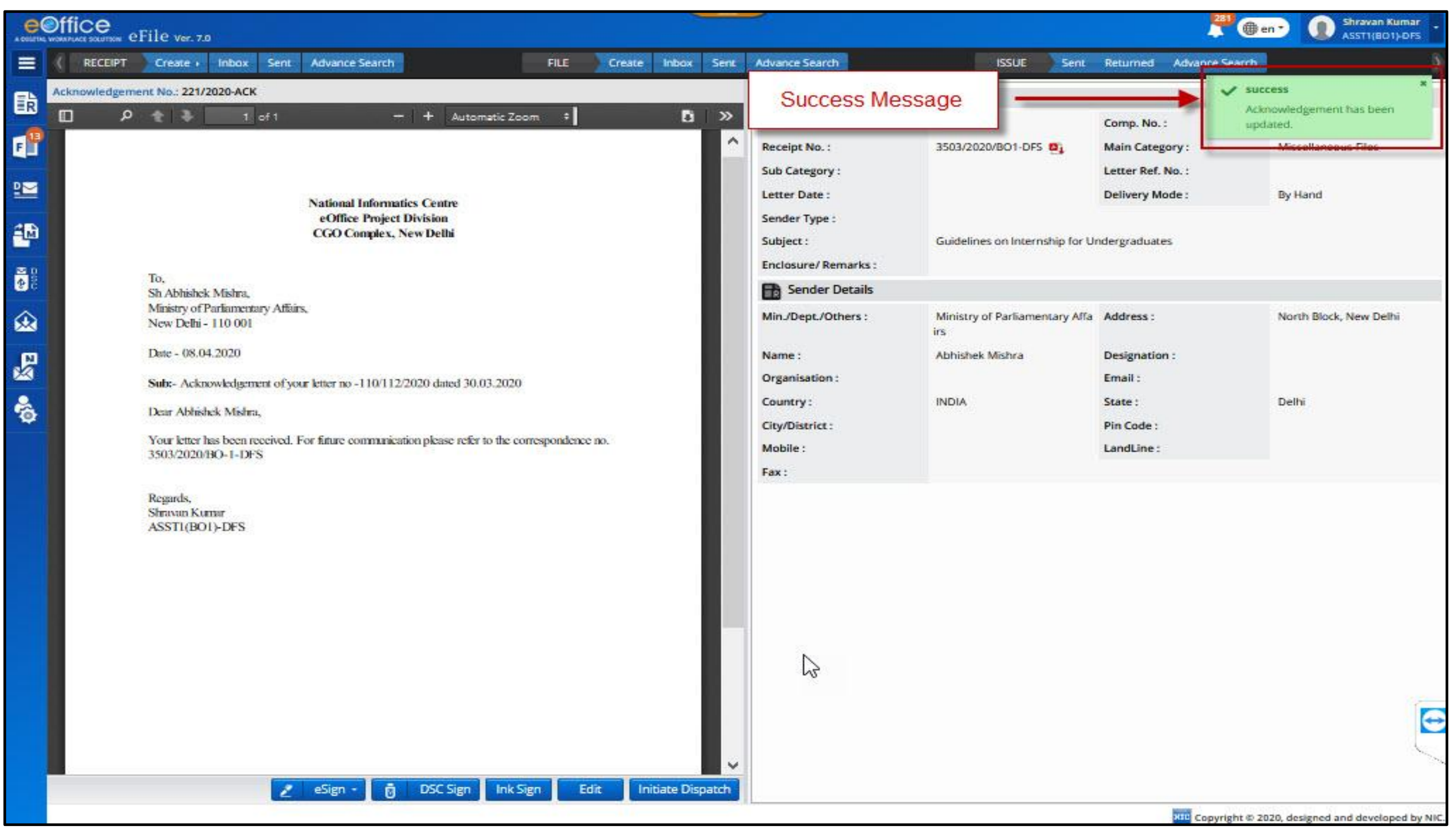


Figure 161

Signing Acknowledgement

The section describes the digital signing process of an acknowledgement.

DSC SIGN

It is the process of digitally signing using eToken.

STEPS TO FOLLOW:

1. Click opens an acknowledgment from **'Acknowledgement-> Created'** under **'Receipts'**.
2. Click **'DSC Sign'** button.
3. Refer step 5 onwards under article Signing draft.

eSign

It is the process of digitally signing using eHastakshar/eSign services based on AADHAR. User can digitally sign using OTP or biometrics.

STEPS TO FOLLOW:

1. Click opens an acknowledgment from **Receipt→Acknowledgement→Created**.
2. Click **eSign** button.
3. Refer step 5 onwards under article Signing draft.

Ink Sign

It is the process of maintaining a copy of physically signed draft letter and confirming it with its originally approved copy in the system.

STEPS TO FOLLOW:

1. Click opens an acknowledgment from **'Acknowledgement-> Created'** under **'Receipts'**.
2. Click **'Ink Sign'** button and upload the physically signed copy (PDF format) of approved draft.

   (**Note:** *The uploaded signed copy is available by clicking on **'Signed Copy'** link.*)
3. Refer step 5 onwards under article Signing draft.

Send Acknowledgement

Describes the process of sending personalized acknowledgement to the desired recipient(s) (sender of the receipt or to any other required recipient).

STEPS TO FOLLOW:

1. Click **'Initiate Dispatch'** to initiate dispatch for the acknowledgement.

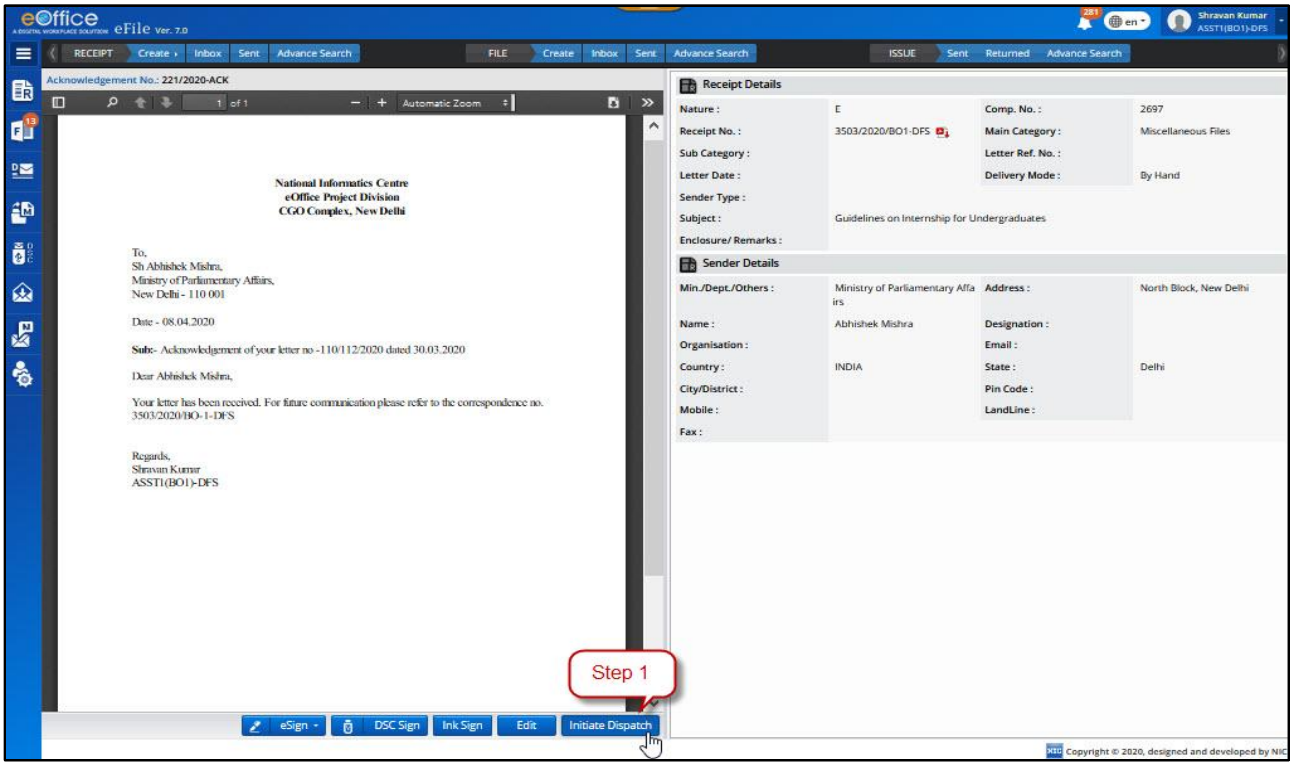


Figure 162

2. Intended recipients are listed under **'Recipient Details'**. Click **'Add Recipients'** to add more, if required.

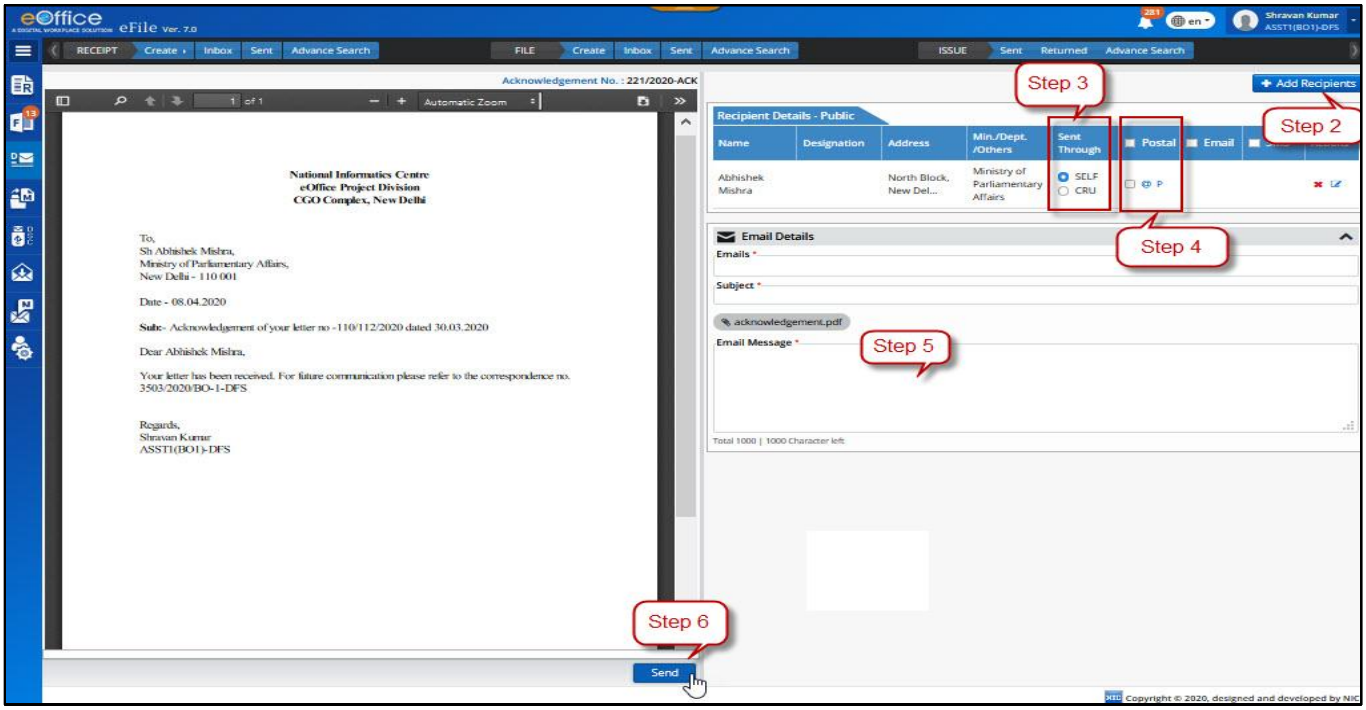


Figure 163

3. In **Recipient Details – Public**, select **Sent Through** for each public recipient (**Self** or **CRU**).

   c) **Self** – Choose **Self**, if the letter is to be dispatched through self.

   d) **CRU** – Choose **'CRU'**, if letter is to be dispatched through Central Registry Unit.

   On Selecting **CRU** Popup will be displayed. Fill CRU details in popup –

   - **CRU Name** – Name of the dispatch person in CRU through which letter is to be dispatched.
   - **Delivery Mode** – Delivery mode via which letter is to be dispatched
   - **Remarks** – Additional remarks for the dispatch person if any.
   - **Copy to All** – Select checkbox to auto fill CRU details in all the Public Recipient, to whom letter is dispatching through is CRU.

Note:

- Dispatch by **Self** and **CRU** is not applicable for '**Internal**' and **'External' Recipient**.
- Dispatch to recipients under **'Internal'** and **'External'** will take place as eOffice to eOffice transaction.

4. Enter Delivery Mode -

   a) **Postal** - Select Postal checkbox and fill postal details if dispatching through post.

Note:

- Delivery Mode **Postal** is available only in case **Dispatch** mode chosen is **Self**.

(**Postal Details** - Postal Mode*, Postal charges, Medium, Weight, Mode No., Peon Book No., Peon Name, Out Date and Time*, Delivery Date and Time, Delivery Status and check **'Copy to All'** in case the postal details are to be copied to all recipients in case of multiple recipients)

b) **Email** – Select **'Email'** check box and fill email details, if letter is to be dispatched via email.
Email Details to be entered are - Email Id (Auto populated if available), Subject, Email Message. User can check **'Copy to All'** in case the same message is to be copied to all recipients in case of Multiple recipients)

c) **SMS** – Select SMS checkbox and provide mobile no. (Auto populated if available) for sending notification to the recipient regarding the dispatch.

Note:

- Delivery Mode **'Email'** and **SMS'** are available only in case the email ID and mobile number details of the respective recipient is added in the recipient details.

5. **Enter Additional Email Details** – If the letter is to be dispatched additionally to some people, then this can be done via email. For example, you might want to dispatch a copy to one of the officials in senior management for information purpose only. For dispatching to additional users, provide Email ID, Subject and Email Message. The Dispatch letter is automatically attached to the email.

6. Click **Send.**

Note:

- To check the list of Acknowledgement sent so far, and check their respective Dispatch numbers generated for every recipient, Refer **Dispatch (Officer)→Acknowledgement →Sent**.

Consolidated View of Receipt

This feature allow user to view receipts available on his or her multiple posts in a single window.

STEPS TO FOLLOW:

1. Log into eFile account to view file inbox list of primary post
2. Click "**All**" posts link available in dropdown under Logged in user's Primary post in profile area.

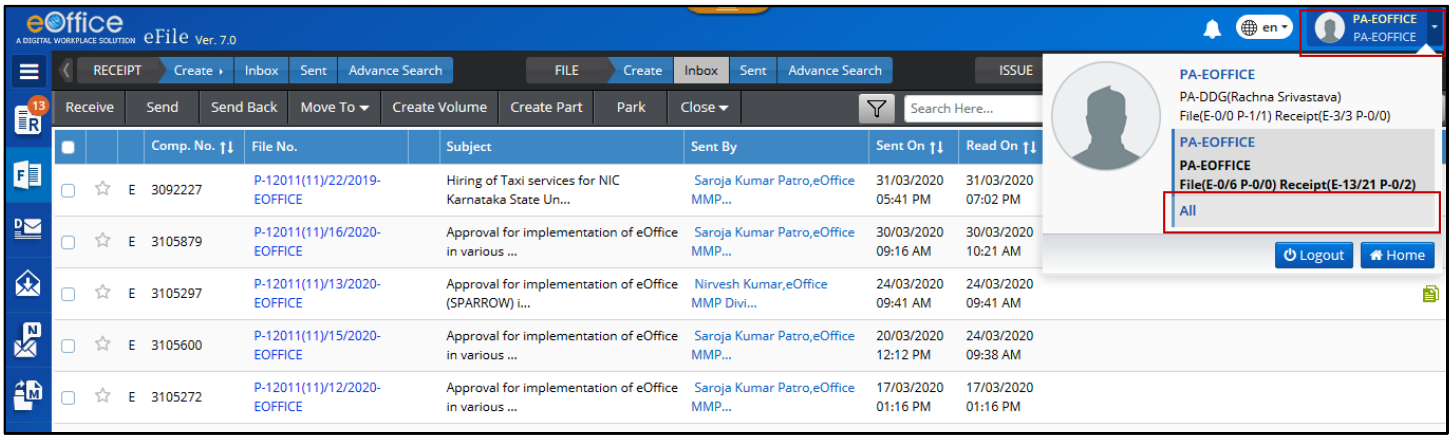


Figure 164

3. Click **OK** in the confirmation popup to switch to consolidated inbox.

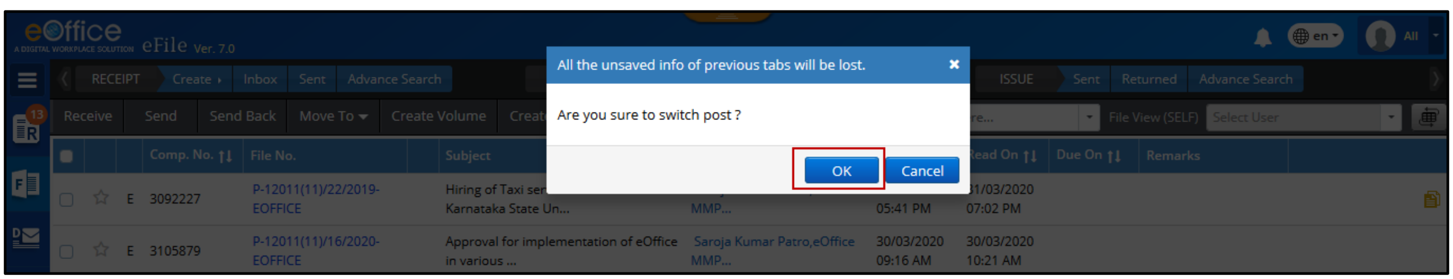


Figure 165

Consolidated Receipt Inbox

- Consolidated Inbox will display Receipt Marked To users multiple posts in a single Inbox list.
- Fields Like Computer No., Receipt number, Subject, Sent By, Sent On, Marked To (Post), Due On, Read on and Remarks are displayed
- Actions on single Receipt selection- **Receive** (*Applicable for unreceived physical Receipt only*), **Put in a File**, **Send Back, Send, Dispatch** and **Close** can be taken.
- Receipt inner page (Detail Page) can be viewed by clicking on **Receipt Number**.
- **Sent By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.
- Inbox View can be switched from Advance (Row based) to Normal (Column Based) by clicking on **switch** icon

- Consolidated Inbox List can be **filtered** depending on **Nature**, **Priority**, **Subject Category** and **Sent Date**, **Due Date**, etc. by clicking Filter Icon in menu bar.
- List of Receipt can be sorted based on **Computer No., File No., Sent On and Due On**.
- Receipt can be searched using Module Search (**Computer No., Receipt No., Subject, Sent By and Remarks**)
- Using context menu (on mouse right click) Inbox Receipt can be **Received** (*Unreceived physical file only*),**Opened in Same or Different Tab** of browser and can be **Send** or **Send Back**
- Clickable Attachment Icon should be displayed next to Receipt no. in case of file having an attached File/Receipt.
- Legends and Color Code should be used to differentiate various Receipt in list.

Note:

- Receipts in Inbox folder of user's various posts should be displayed in Consolidated Inbox List.

Consolidated Receipt Created List

- Consolidated Created list will display Receipt created by users multiple posts in a single created list.
- Fields like Computer No., Receipt number, Subject, Subject Category, Created By, Created On and Remarks are displayed.
- Actions on single Receipt selection- **Send, Put in a File, Dispatch, Generate Acknowledgement and Close.**
- Receipt Inner Page (Detail Page) can be viewed by clicking on **Receipt Number**.
- **Created By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.
- Consolidated Created List can be **filtered** depending on **Nature, Subject Category and Creation Date** by clicking Filter Icon in menu bar.
- List of Receipt can be sorted based on **Computer No.** and **Created On**.
- Receipt can be searched using Module Search (**Computer No., Receipt No., Subject, Subject Category and Remarks**)
- Using context menu (on mouse right click) created receipt can **Opened in Same or Different Tab** of browser and can be **Send**.
- Clickable Attachment Icon should be displayed next to file no. in case of Receipt having an attached File/Receipt.
- Legends and Color Code should be used to differentiate various Receipt in list.

Consolidated Receipt Sent List

- Consolidated Sent list will display Receipt sent by users multiple posts in a single list.
- Fields like Computer No., Receipt number, Subject, Sender, Sent By, Sent To, Sent On, Due On and Remark are displayed.
- Actions on single Receipt selection- **Send, Generate Acknowledgement, Pull Back and Initiate Action** can be taken.
- Receipt inner page can be viewed by clicking on **File Number** in Read only Mode.
- **Sent By** and **Sent To** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.
- User should be able to **Initiate Action** on individual electronic and physical Receipt (*Action should be initiated from post from which individual Receipt is forwarded*)
- User should be able to **Pull Back** individual Unreceived (P)/Unread (E) Receipt. (*Action on Multiple selection is allowed if selected Receipt are forwarded from same post*)
- Consolidated Sent List can be **filtered** depending on **Nature, Subject Category, Sent Date and Due Date** by clicking Filter Icon in menu bar.
- List of Receipt can be sorted based on **Computer No.** and **Created On**.
- Receipt can be searched using Module Search (**Computer No., Receipt No., Subject, Sender, Sent To and Remark**)
- Clickable Attachment Icon should be displayed next to Receipt no. in case of file having an attached File/Receipt.
- Legends and Color Code should be used to differentiate various receipts in list.

Print/Download Receipt

This feature allows user to Print/Download content of Receipt as per selection

Important Points:

✓ User must have assigned **Role_DOWNLOADER.**

STEPS TO FOLLOW:

1. Click **Download/Print** action button on Receipt Inner Page to open Downloading page.

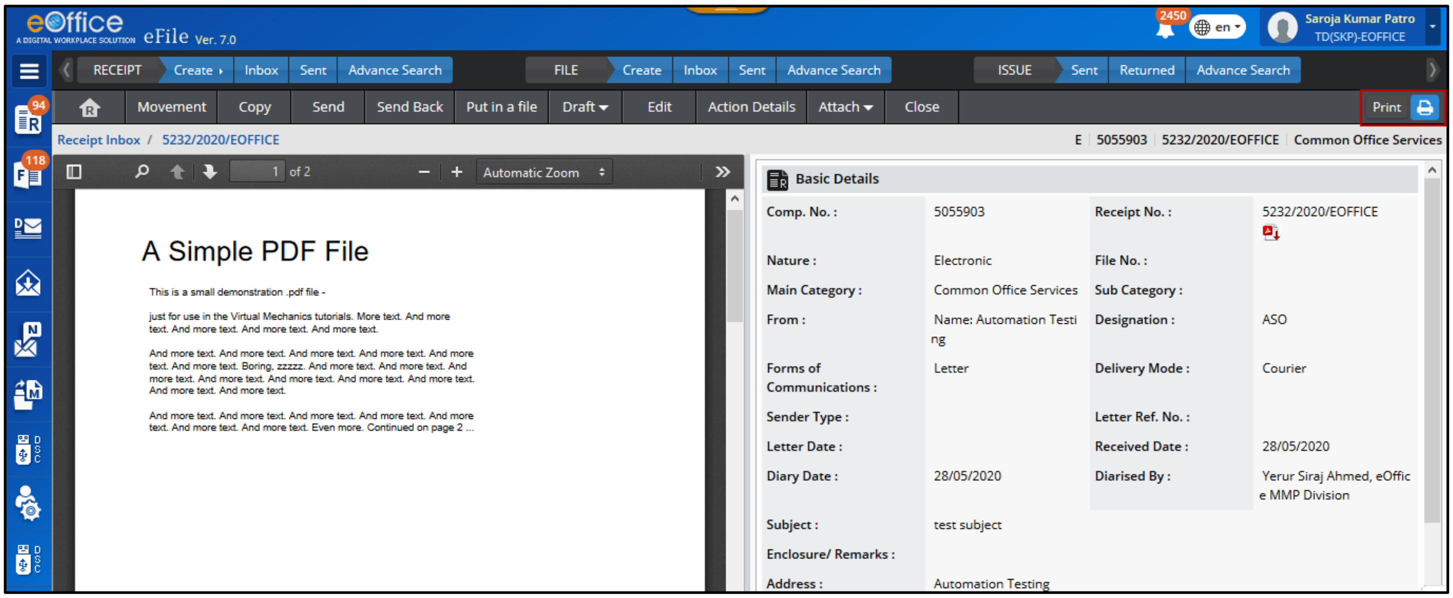


Figure 166

2. Select the **Radio** Button (Complete Receipt, Receipt Details, Draft, Issue, Movements History and Action Detail) as per requirement.

3. Select **Customize** button (if required) to download selected content of Complete Receipt, Draft, Issue, Movements History and Action Detail.

4. Click **Preview** Button to view selected content. (*If Required*)

5. Click **Download** Button.

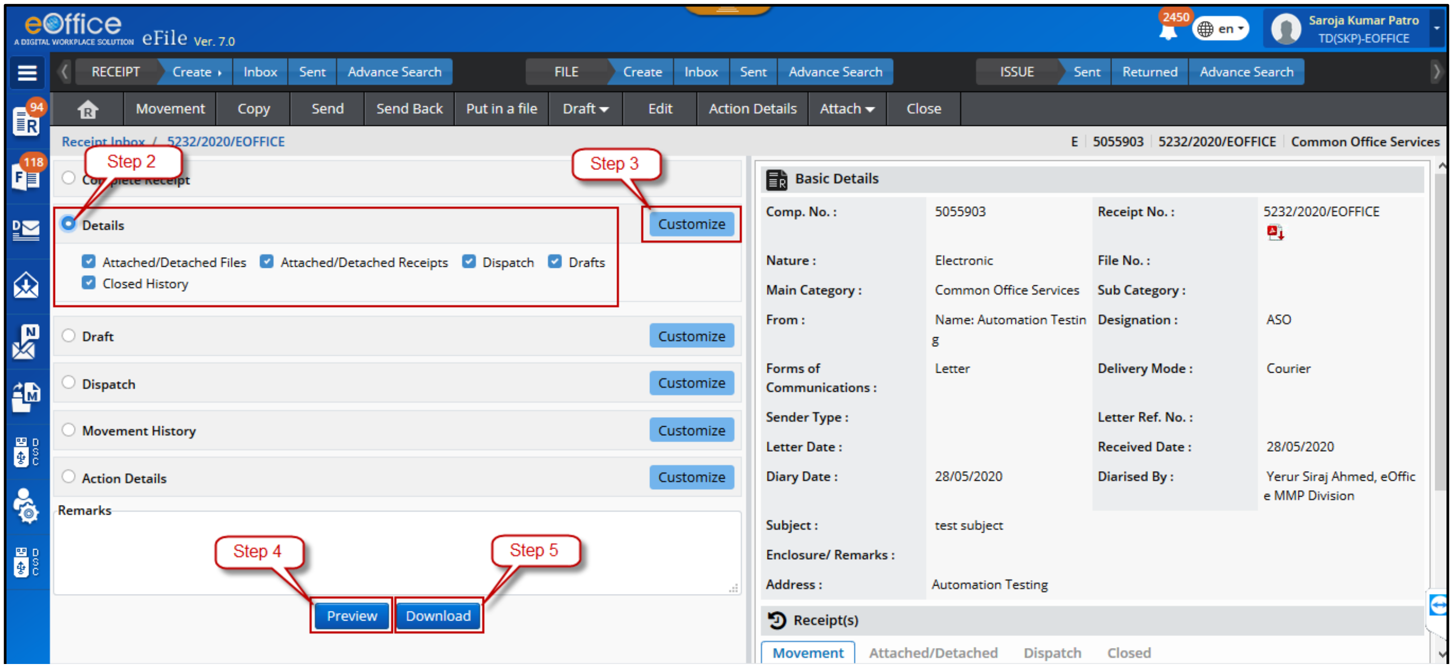


Figure 167

Note:

- Selected Content of Receipt will get downloaded to Systems in PDF format.
- Receipt No. (Computer No.) will be embossed on every page of downloaded File.
- Draft no., Issue no., Receipt no. will be embossed on respective documents.
- Downloaded page sequence No. should be embossed on every page at center Bottom.

Advance Search for Receipt

This Feature allows User to users to Search and Retrieve Receipt (According to the assigned Search Scope) and takes actions on searched records (According to assigned Action Scope).

Important Points:

- ✓ Search Privileges must have been set for instance level by administrator. (Refer Search privilege for whole instance).
- ✓ Search privilege if set for user must restrict or allow the user to search and take action beyond the scope set for whole instance (Refer Search privilege for individual user).

STEPS TO FOLLOW:

1. Click **Advanced Search** link in **Receipt Quick Access** Menu. (*System redirects to the 'Advanced Search' screen with 'Receipt' tab activated by default*.)

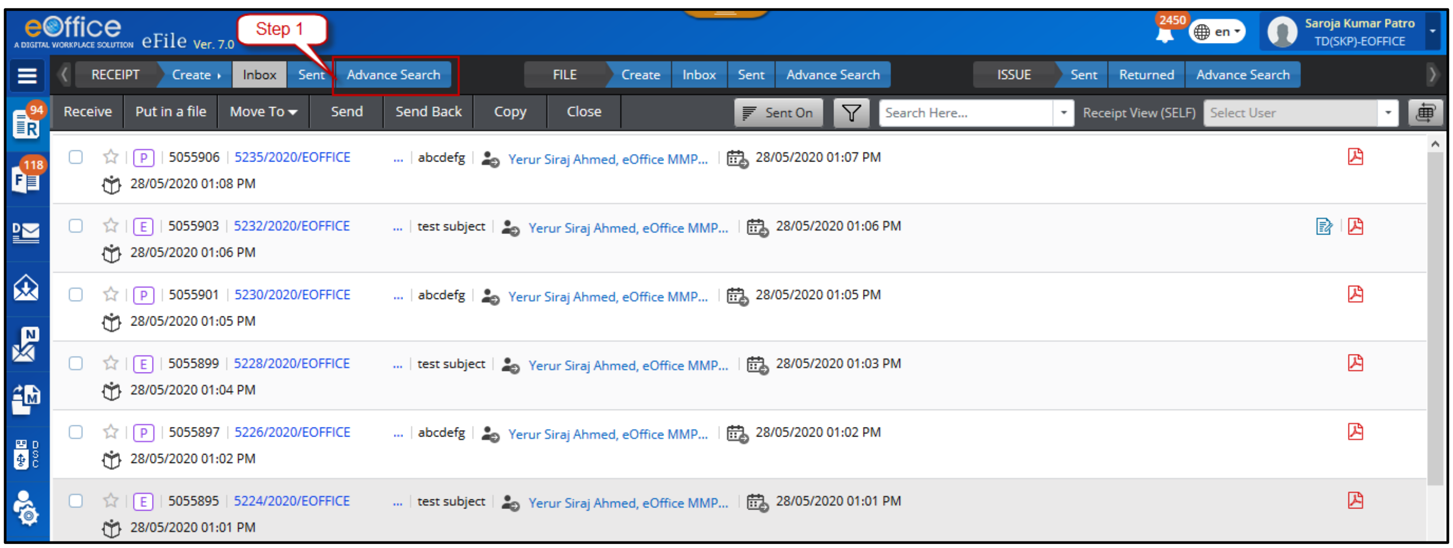


Figure 168

2. Select **Physical Scope** and **Electronic Scope** (*By Default Value is Global or as per assigned Search Scope*).

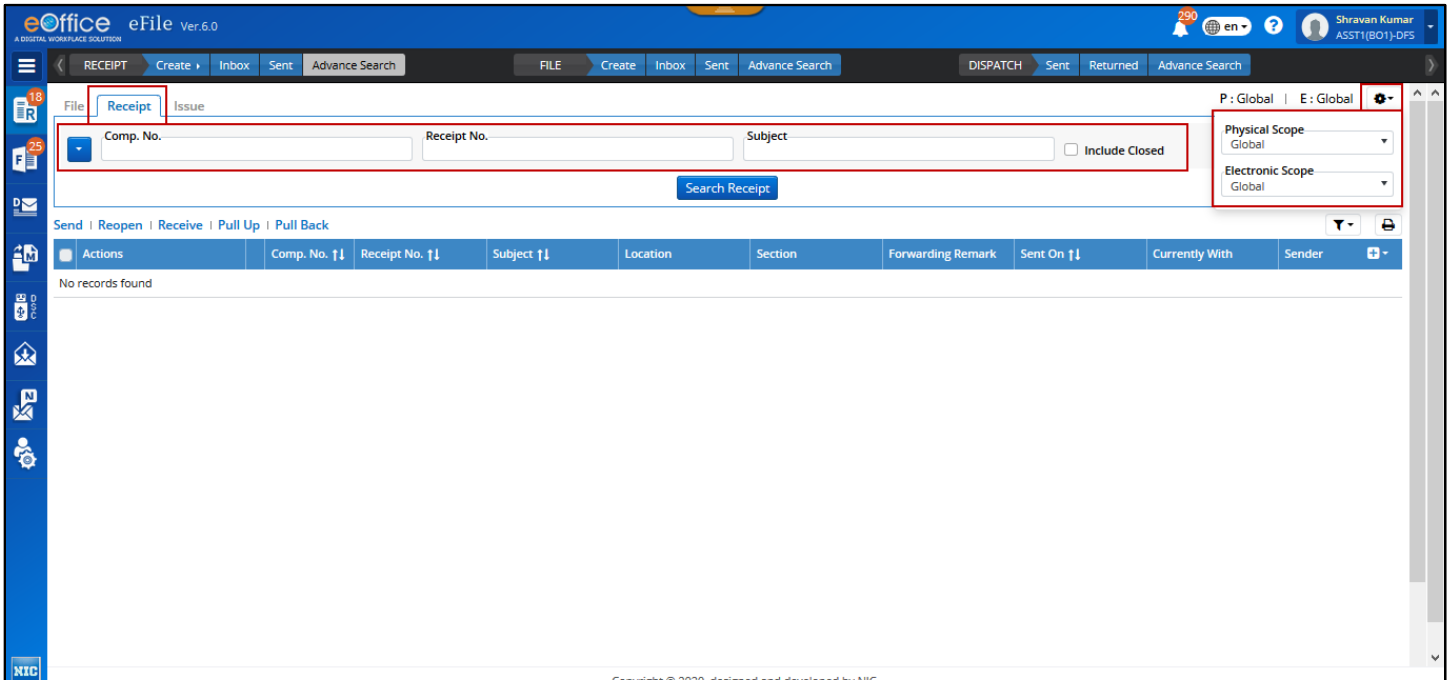


Figure 169

3. Search from main **Basic parameters** (*Computer no., Receipt No. or Subject*).**Figure 169**

4. Select **Additional parameters** from dropdown list icon to search with additional inputs. (*Received/Sent, Diary Detail and Sender Detail*)

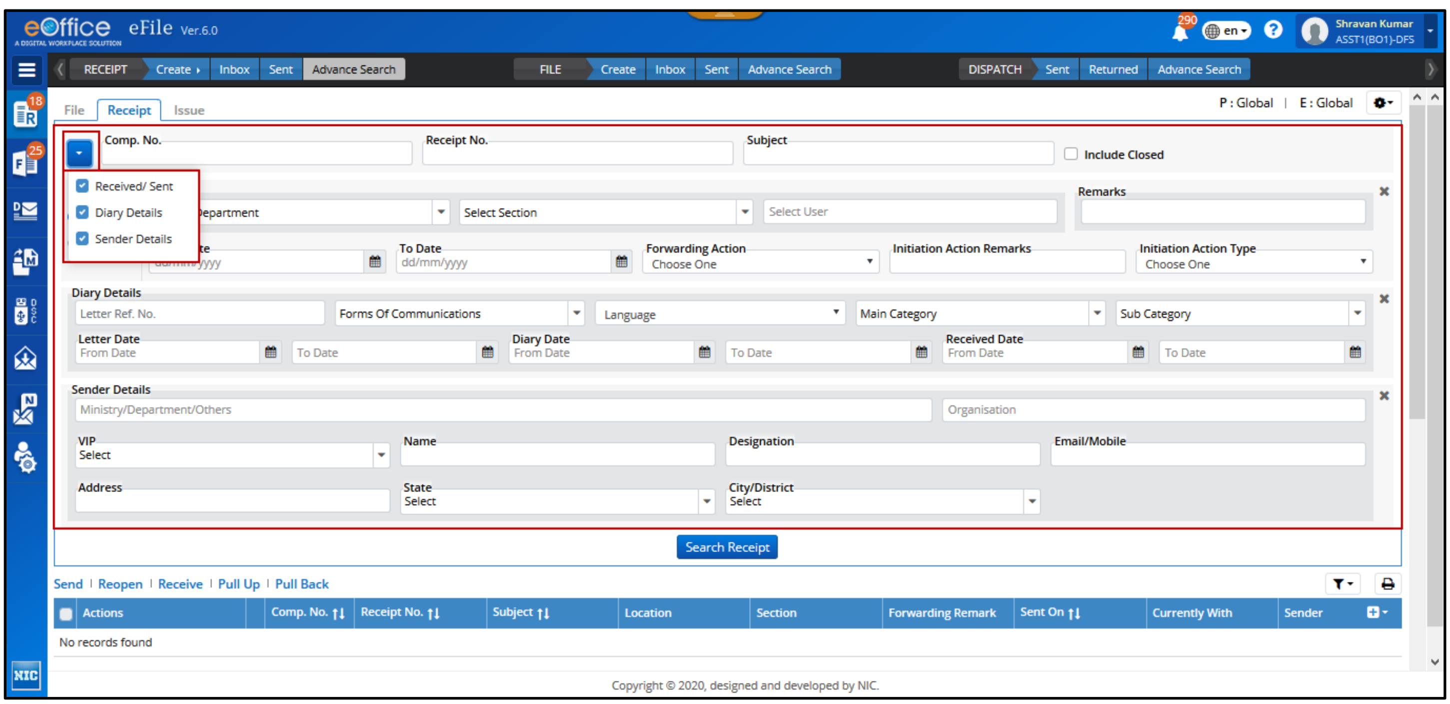


Figure 170

5. Click **Search Receipt** button to search the receipt records.

6. Opt for default output fields or **Select/Remove** output fields. (*Computer No., Receipt No. and Subject cannot be removed*)

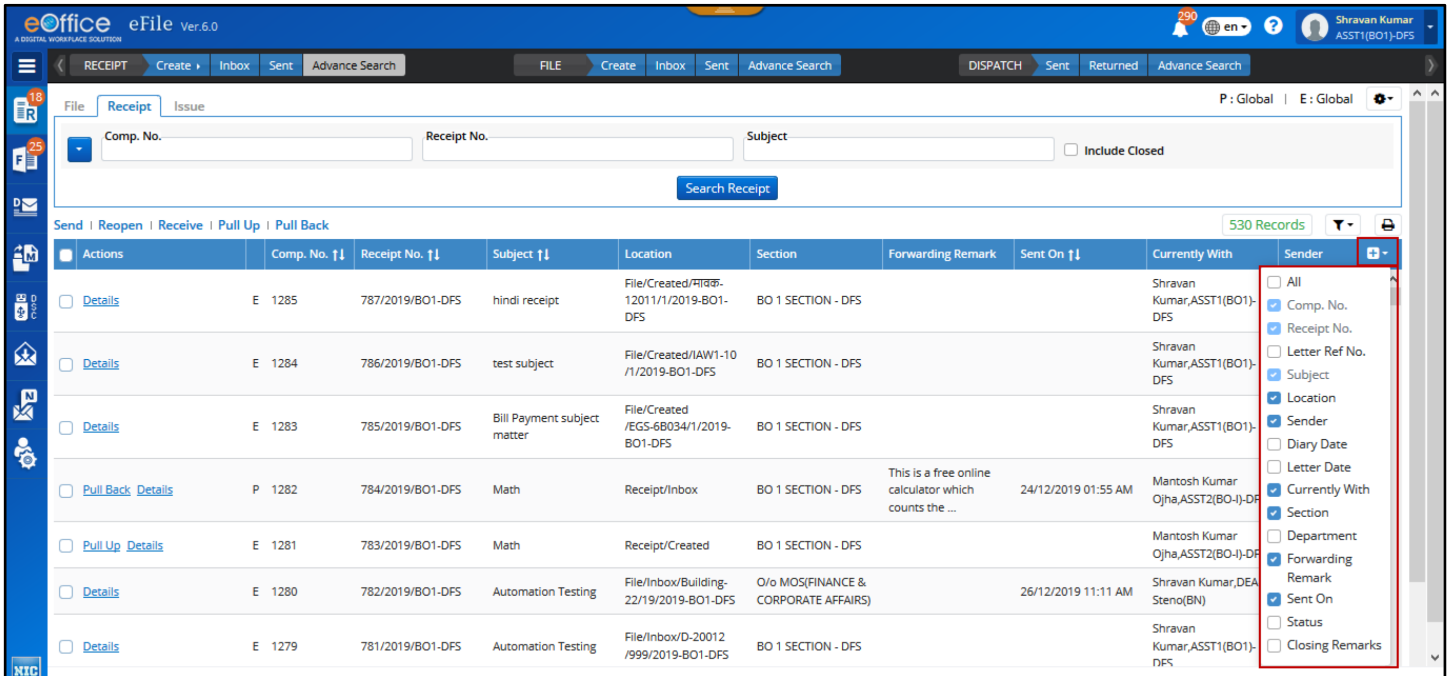


Figure 171

Note:

- List of Receipt will be displayed based on selected input search parameters values.
- Searched record will display file(s) depending on their current location.
- Searched record list can be sorted depending on Active, Created and Closed File.
- By Default Closed Receipt will not be displayed in output. User should have to select **Include Closed** checkbox to retrieve closed Receipt Record.

Actions Allowed on Searched Receipt

- **Send:** Clicking **Send** Action Link/Menu (for single/multiple Receipt) should open send window to forward single/multiple Receipt.

Note:

- This action will be applicable when receipt is available in signed in user's Receipt inbox/inbox folder/Created.

- **Reopen:** Clicking on **Reopen** Action Link/Menu (for single/multiple Receipt) should open Reopen Remark popup. On providing mandatory **Remark** and Clicking **OK** should Reopen the Receipt.

Note:

- This action will be applicable when Receipt is available in signed in user's Receipt Closed (By Me) List.

- **Receive:** Clicking on **Receive** Action Link/Menu (for single/multiple Receipt) should Receive unreceived physical receipt to user's Receipt inbox.

Note:

- This action will be applicable when physical receipt is available in user's Receipt inbox/inbox folder in unreceived state.

- **Pull Up:** Clicking **Pull up** Action Link/Menu (for single/multiple Receipt) should open a confirmation popup. Providing **Remark** and clicking **OK** should Pull Up single/multiple Receipt to user's Receipt inbox.

Note:

- This action should be displayed depending upon action scope set for whole eOffice Instance.
- Action scope for individual should superimpose scope set for whole instance.

- **Pull Back:** Clicking **Pull Back** Action Link/Menu (for single/multiple Receipt) should open a confirmation popup. Providing **Remark** and clicking **OK** should Pull Back single/multiple Receipt to user's Receipt inbox.

Note:

- This action will be applicable when Receipt is available in signed in user's Receipt sent list and remained in unread/unreceived state in recipient Inbox.

- **Details:** Clicking on details action link should display the complete Details and Movement of Receipt.

File

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

Create a new File

STEPS TO FOLLOW:

1. Click "**Create New**" from the "File" module or "**Create"** link in Quick Access Menu bar to view file creation page. (**Figure 172**)
2. Select **Nature** (Electronic/Physical) and **Type** (Non SFS/SFS) of File to be created.
3. Select the **File-Heads** from the available drop-down list under "File No".
4. Enter Mandatory Description and provide other relevant details like Main Category, Sub-Category, Remarks, Previous References, Later References and Language.
5. Click '**Continue working**' to create a new file of selected Nature and Type.

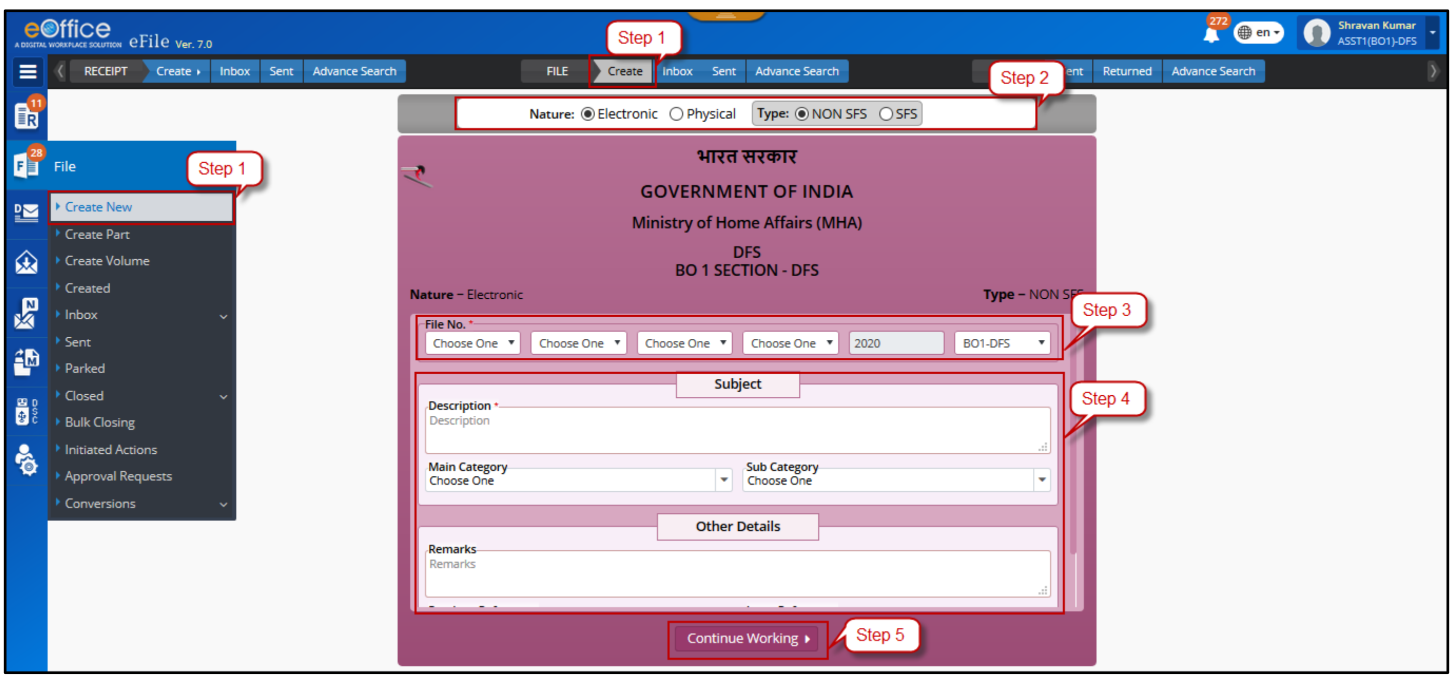


Figure 172

Note:

- Creation of File depends upon **Role Assigned to User**
- Selection of **Nature** and **Type** of File is **Configuration Based**

IMPORTANT POINTS:

- **Non SFS -** User must select the available file heads for the nomenclature of File.
- **SFS -**User can enter File No. without any restriction or standards
- **File No.** once generated cannot be edited however other metadata can be edited any time by the users of Dealing Section of File.
- **Created Files** can be viewed from Created Sub module of File Module.

Created File List

The Created List of Files displays Files that are Created (Electronic/Physical) and not yet forwarded and created files those are forwarded to recipient but pulled back later. User can Click **Created** link under file module to view Created File listing. (**Figure 173**)

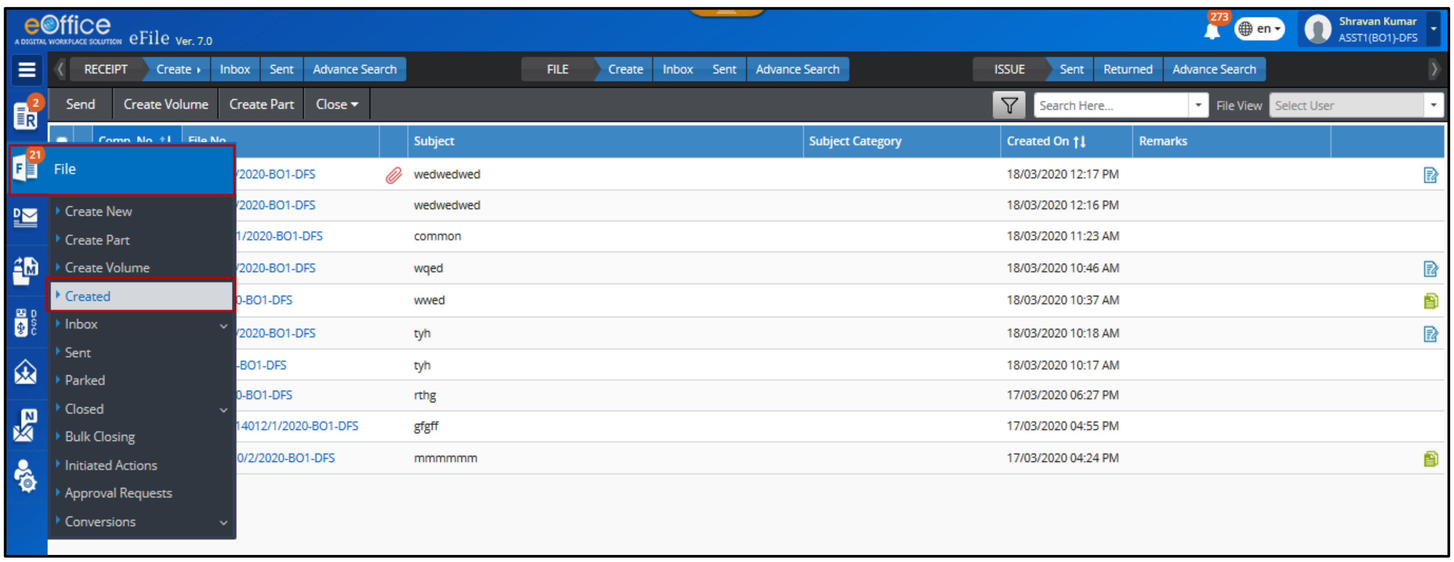


Figure 173

- Created List displays Files that are Created (Electronic/Physical) and not yet forwarded and created files forwarded to recipient but pulled back later.
- Fields like Nature of File (E/P), Computer No., File Number, Subject, Subject Category, Created On and Remarks are displayed.
- Actions like **Send**, **Create Volume** (For Physical File), **Create Part, Close** can be taken.
- File inner page can be viewed by clicking on **File Number**.
- List of Files can be sorted based on **Computer No**. and **Created On**. (**Figure 174**)

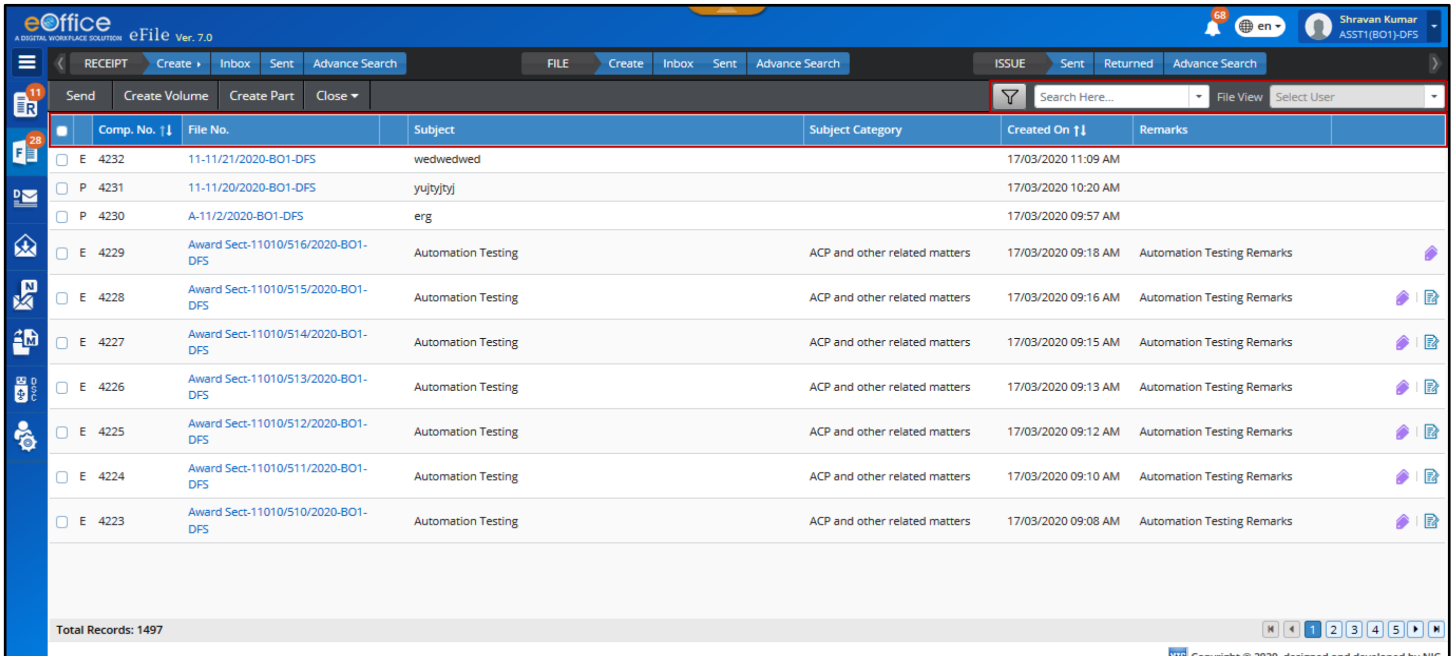


Figure 174

- Using context menu (on mouse right click) created files can be opened in same or different tabs of browser and can be sent (**Figure 175**).

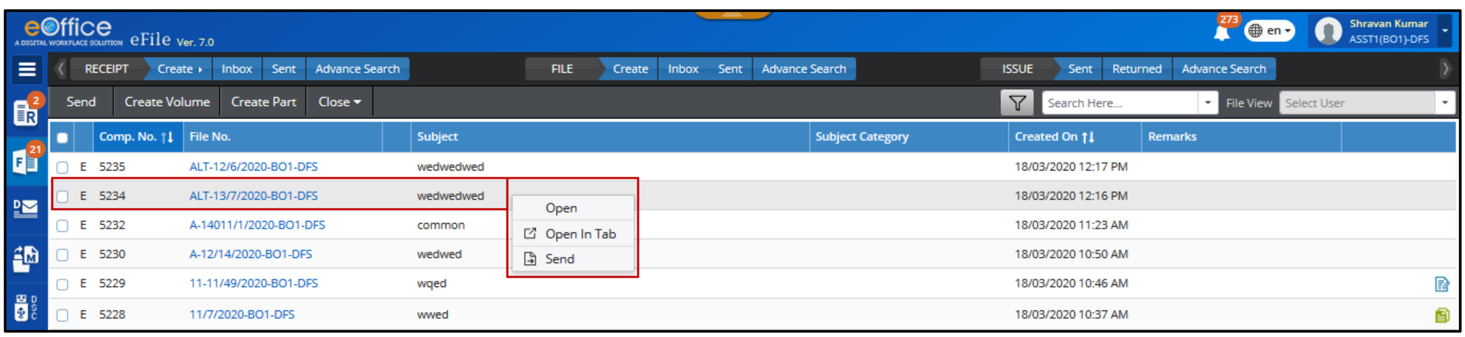


Figure 175

- Files can be searched using Module Search (Computer No., File No., Subject, Subject Category and Remarks. (**Figure 176**)

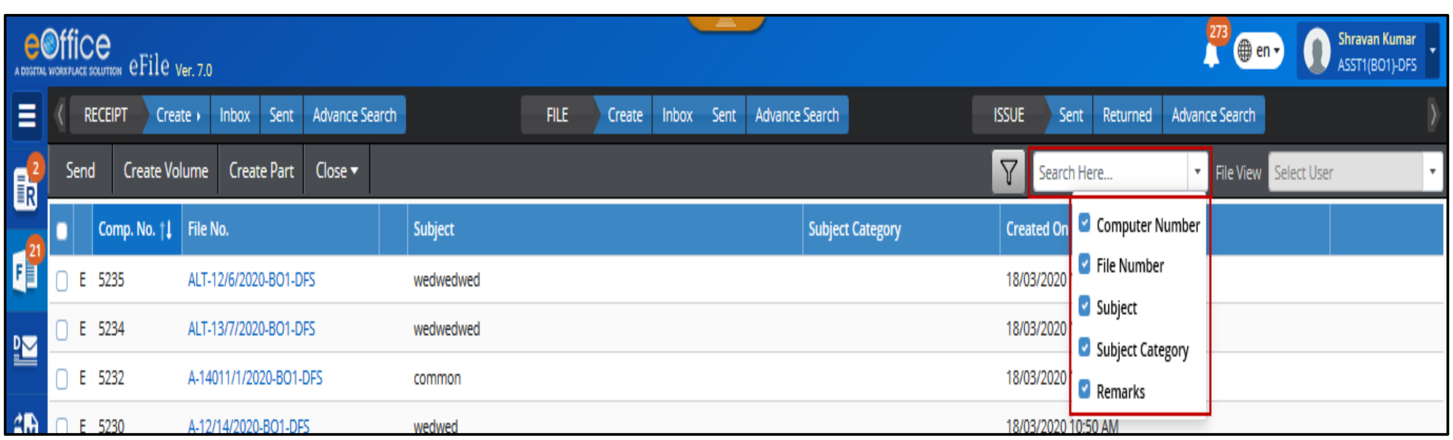


Figure 176

- Created File list of Self, Section User and User under individual post hierarchy can be viewed through **File view** (**Figure 177**).

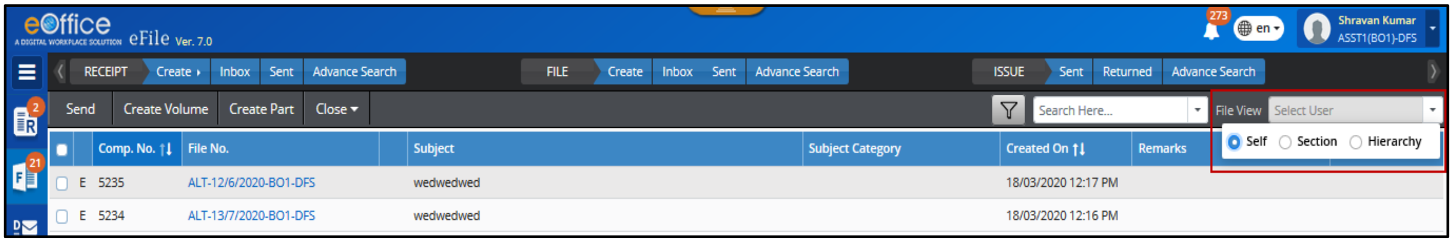


Figure 177

Note:

- Created list of Section User and User under Individual Post Hierarchy can only be viewed. File need to be pulled up, to view inner page and take various actions.

- Clickable Attachment Icon will be displayed next to File no. in case of File having an attached File/Receipt. (**Figure 178**)

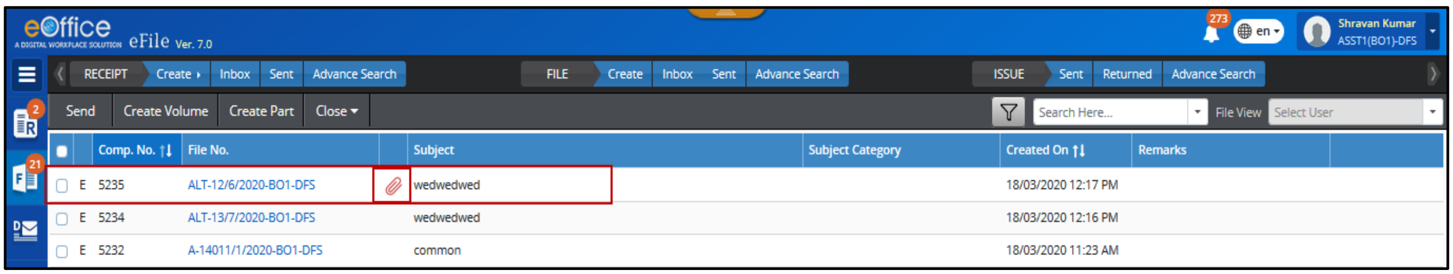


Figure 178

Note:

- Clicking on Attachment Icon will display list of attached File/Receipts in a Popup window.

- Created File list can be **filtered** depending on **Nature**, **Subject Category** and **Creation Date** by clicking Filter Icon in menu bar. (**Figure 179**)

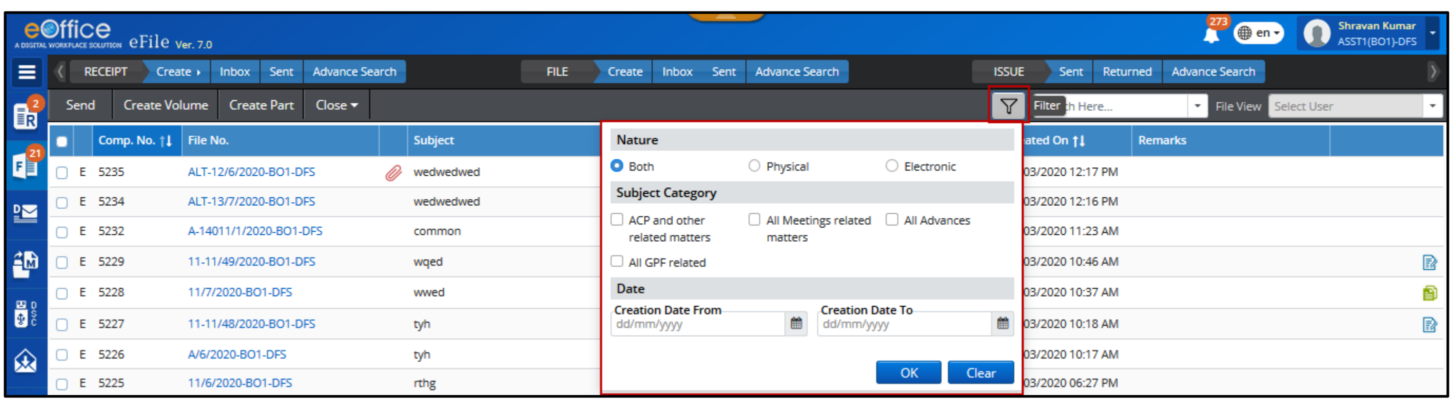


Figure 179

- Legends and Color Code are used to differentiate various Files in list.

File Inbox

The File Inbox is the list of Files submitted/marked to a user. The Files in Inbox are in active state pending for the user's necessary action for its disposal. User can clicks on **Inbox** sub module under **File** module or **Inbox** Quick Access menu of File in the Home Page to view Inbox List.

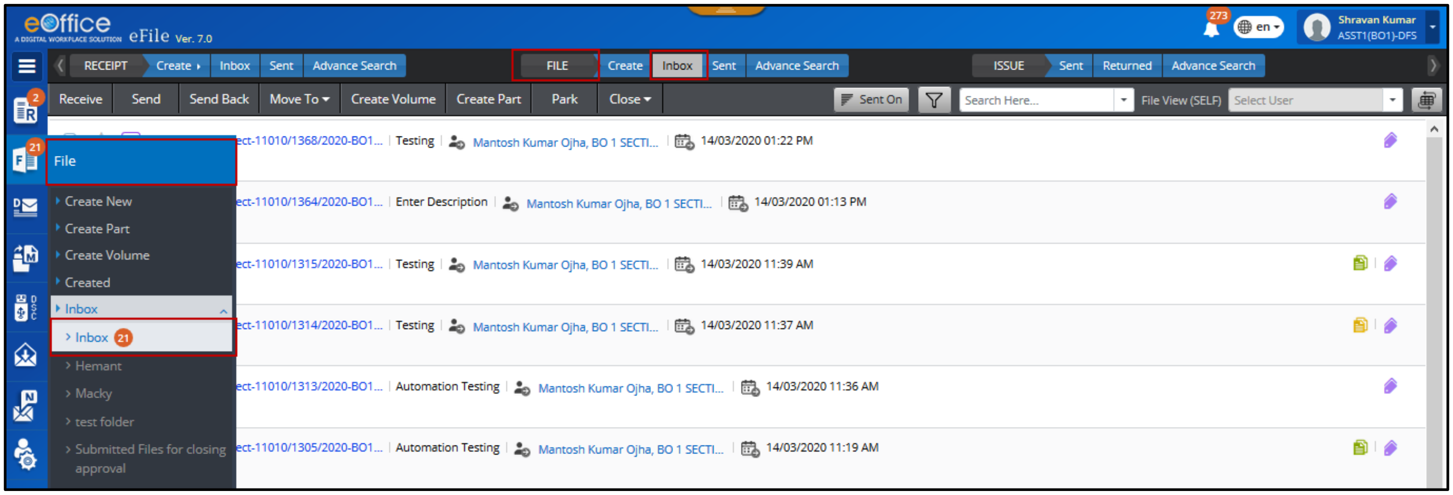


Figure 180

- Inbox list displays record of Files that have been marked to the logged in user.
- Fields like Nature of File (E/P), Computer No., File Number, Subject, Sent By, Sent On, Read on, Due On and Remarks are displayed.
- Physical file marked to user are displayed as unreceived and user will not be able to click open the file without receiving them.
- Actions like -**Receive** (Applicable for unreceived physical files only), **Send Back**, **Send**, **Move To** (Inbox Folder), **Create Volume** (Applicable for physical files only), **Create Part**, **Park**, **Close** (Send For Approval) can be taken.
- Inbox View can be switched from Advance (Row based) to Normal (Column Based) by clicking on switch icon. (**Figure 181**)

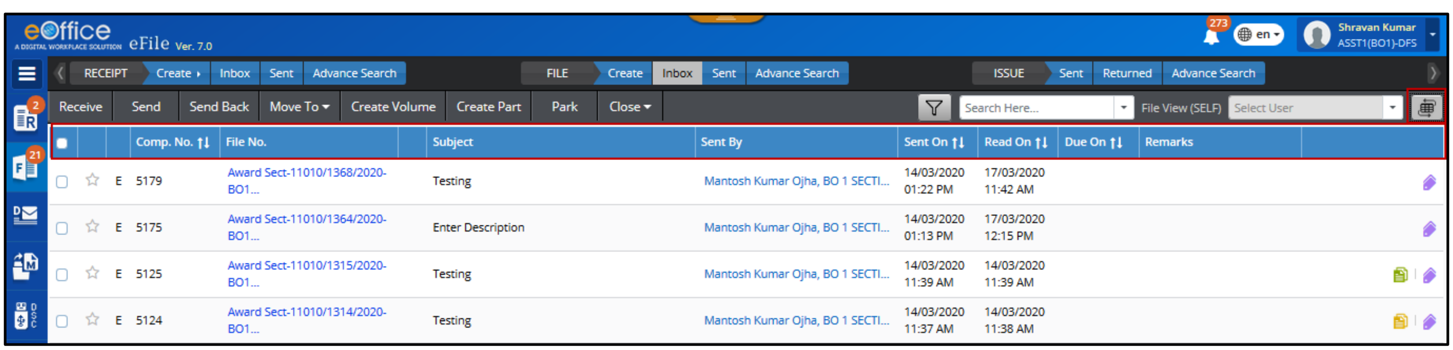


Figure 181

Note:

- To configure the default view for Inbox List Refer Preferences sub module of Setting Module.

- File inner page can be viewed by clicking on **File Number**.
- **Sent By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name. (**Figure 182**)

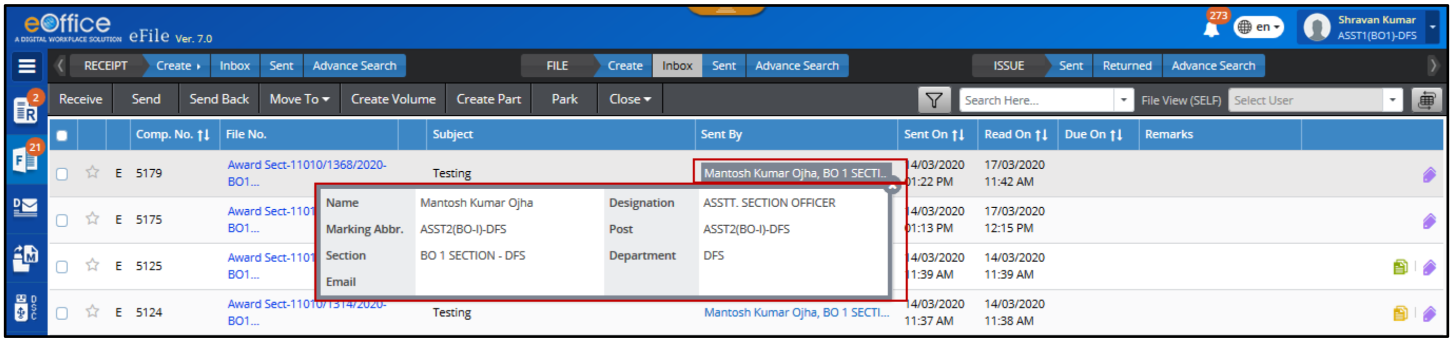


Figure 182

- List of Files can be sorted based on Computer No., Sent On and Due On. (**Figure 183**)

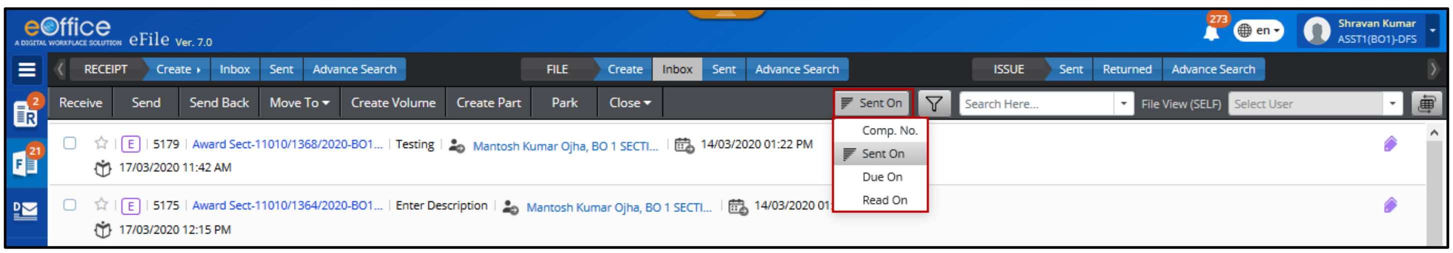


Figure 183

- Files can be searched using Module Search (Computer No., File No., Subject, Sent By and Remarks). (**Figure 184**)

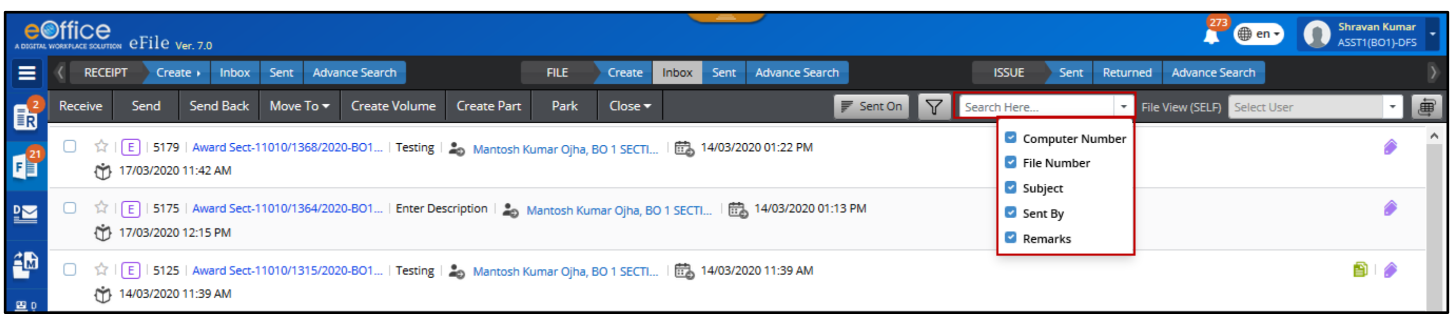


Figure 184

- Using context menu (on mouse right click) Inbox files can be **Received** (Unreceived physical file only),**Opened in Same or Different Tab** of browser and can be **Send** or **Send Back**. (**Figure 185**)

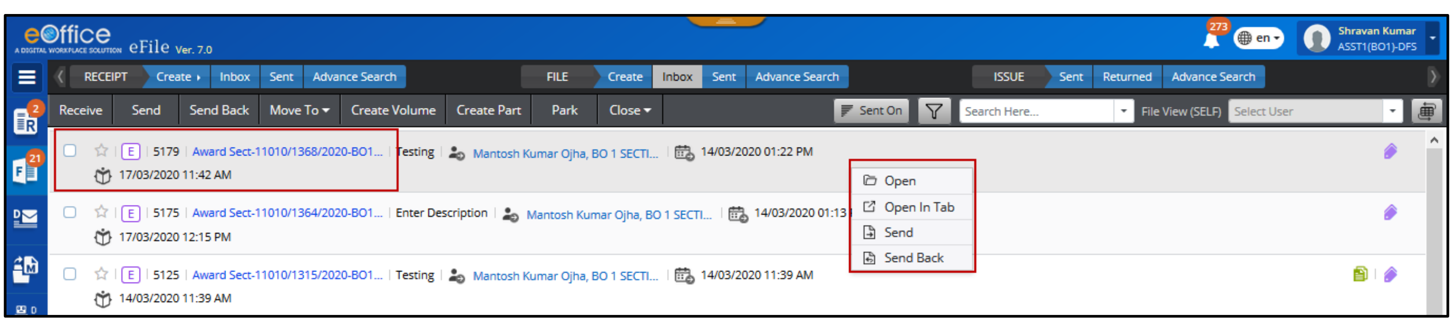


Figure 185

- Inbox file list of Self, Section User and User under individual post hierarchy can be viewed through **File view**. (**Figure 186**)

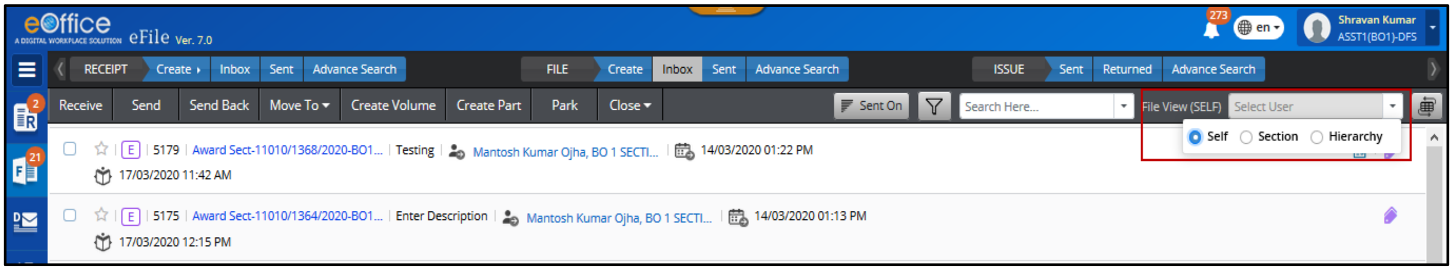


Figure 186

Note:

- Inbox list of Section User and User under Individual Post Hierarchy can only be viewed. File need to be pulled up, to view inner page and take various actions.

- Clickable Attachment Icon will be displayed next to file no. in case of file having an attached File/Receipt. (**Figure 187**)

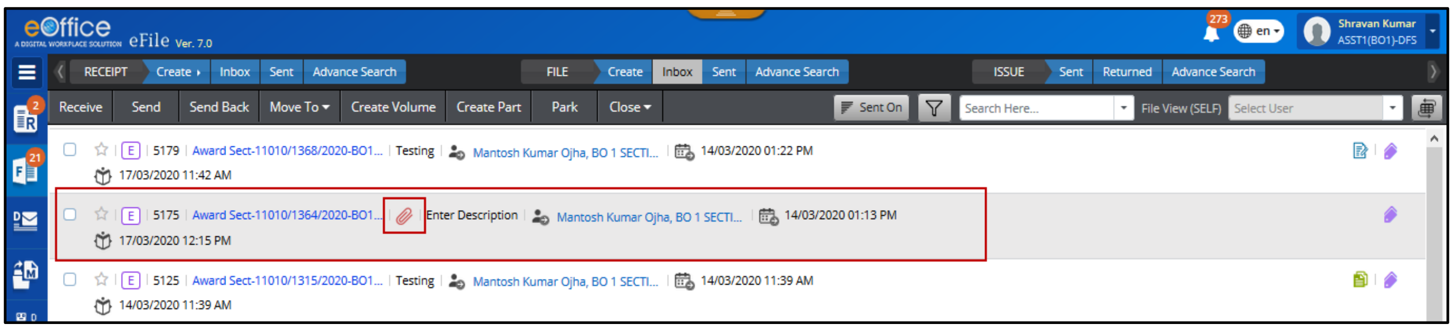


Figure 187

Note:

- Clicking on Attachment Icon will display list of attached File/Receipts in a Popup window.

- Inbox File List can be **filtered** depending on **Nature**, **Priority**, **SubjectCategory** and **Sent Date**, **Due Date**, etc. by clicking Filter Icon in menu bar. (**Figure 188**)

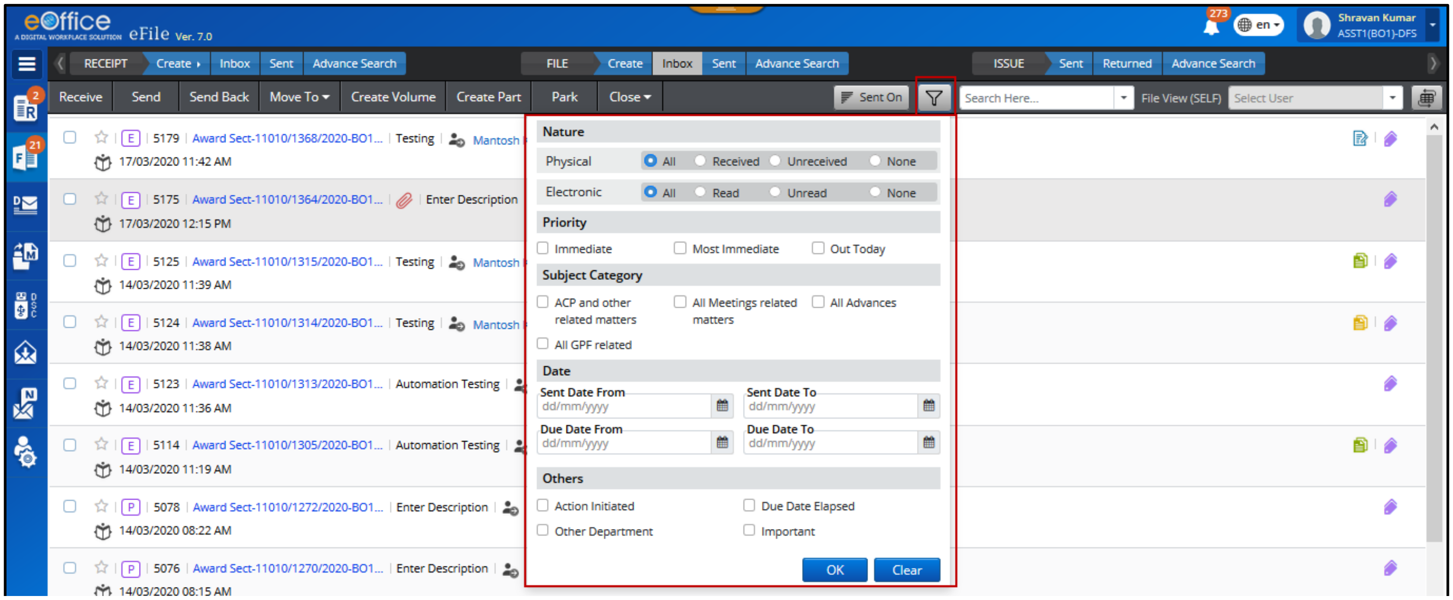


Figure 188

- Legends and Color Code will be used to differentiate various file in list.

Move File to Folder of Inbox

User can manage Inbox Files by moving selected Files to Self-created Folders in File Inbox.

Steps to Follow:

1. Select Files from Inbox or Folder of Inbox.
2. Click destination Folder from dropdown list of My Folders under Move to menu. (**Figure 189**)

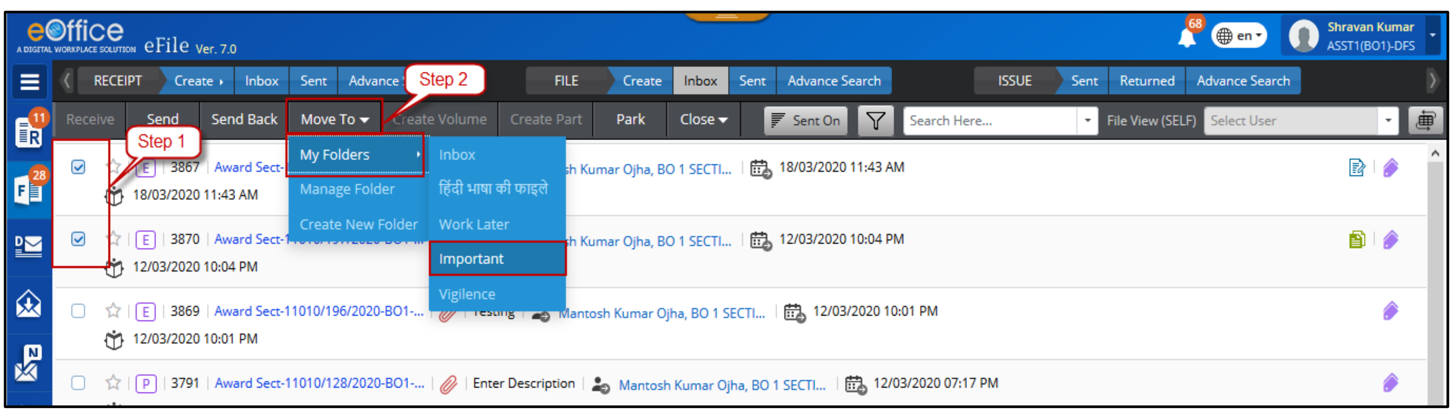


Figure 189

Note:

- For Editing Folder Name and Deleting Folders Refer Folder Management.

Electronic File Inner Page

Electronic File Inner pages displays Nature of File, Computer No., File No., Subject, Noting Panel, Correspondence panel and various menus to work on file. (**Figure 190**)

Electronic File Inner page can be opened by clicking on File no. link from various list pages viz. Inbox/Inbox Folder/Created/Parked Folder.

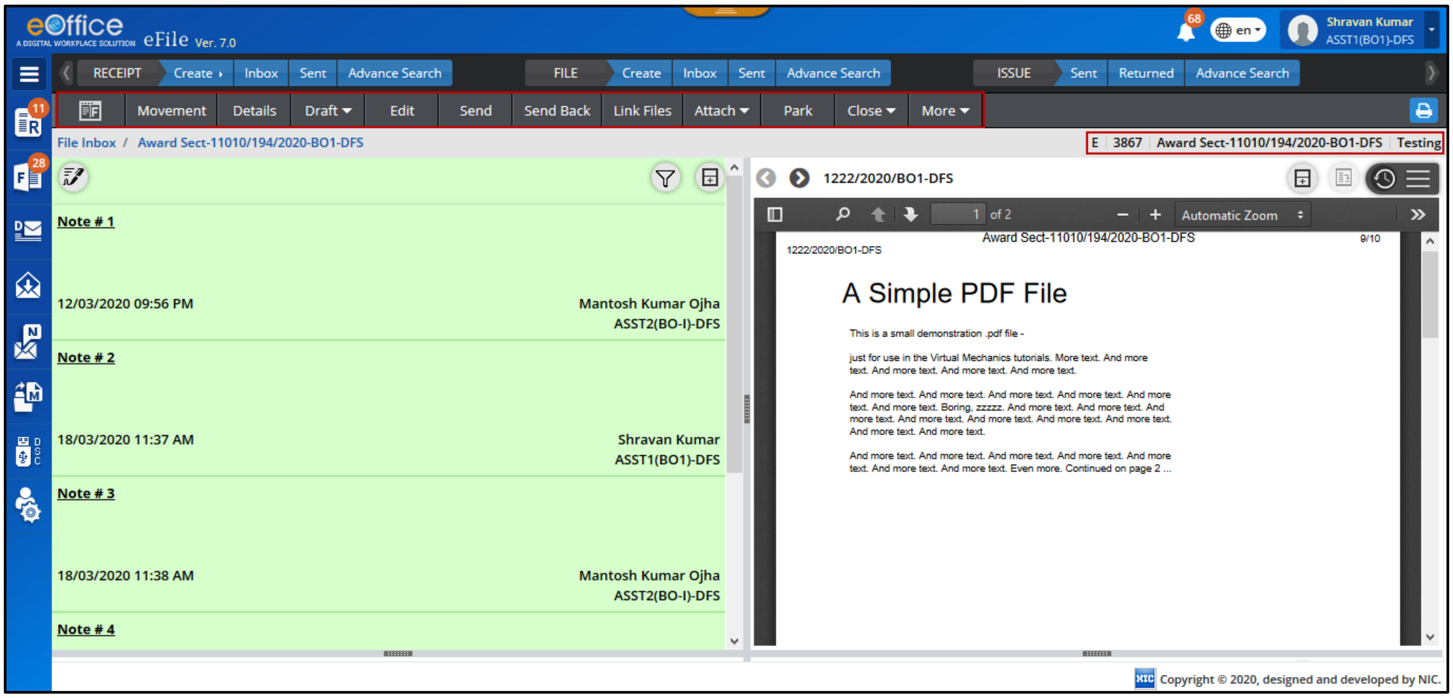


Figure 190

Actions on File Inner Page

Actions on Menu Bar

- **File Home Page:** Clicking **File homepage Icon** will display files Green Note in Left Panel and ToC/Recent Correspondence (As per preference setting) on Right Panel.
- **Movements:** Clicking **Movements** will open Movement page of File
- **Details:** Clicking **Details** will open Detail Page of File.
- **Draft:** Clicking **Draft** menu will display **Create New** and **View Draft** sub menu.
  - Clicking **Create new** sub menu of **Draft,** will open Draft editor page.
  - Clicking **View Draft** sub menu of Draft will open List of Draft Created on Right Panel.
- **Edit:** Clicking **Edit** will open File Cover Page to edit Meta data of File.
- **Send:** Clicking **Send** will open Send page of File.
- **Send Back:** Clicking **Send Back** will open file send page with name of Sender of File auto populated in **To** Field.

- **Link:** Clicking **Link** Menu will open **Linked Files** List with option to Link Files.
- **Attach:** Clicking on sub menu **Attach File/Attach Receipt** of Attach File menu will open File/Receipt Attachment Page.
- **Park:** Clicking on **Park** Menu of file will open popup to move File to Parked Folder.
- **Close:** Clicking on submenu (**Close/ Send for Approval**) of Close will open popup to take necessary action.
- **More:** Clicking **More** action menu will display following menus in drop-down.
    - **Action Detail:** Clicking Action Detail will open Initiated Action detail Page.
    - **Create Part:** Clicking on Create Part will open Part File creation page.
    - **Merge:** Clicking on **Merge** will display **Merge File** and **Merge Detail** sub menu.
        - **Merge File** sub menu will be inactive for Electronic File.
        - **Merge Detail** will open details of merged File.
- **Print/Download:** Clicking on **Download** will display a Print/Download page to View or Download Complete/Customized File, Noting, Correspondences, DFA, Local Reference, Movement History and Action Detail.

Note:

- Menus/Action Buttons which are not applicable in currently opened file will remain Inactive.

Actions on Left Panel (Noting Panel)

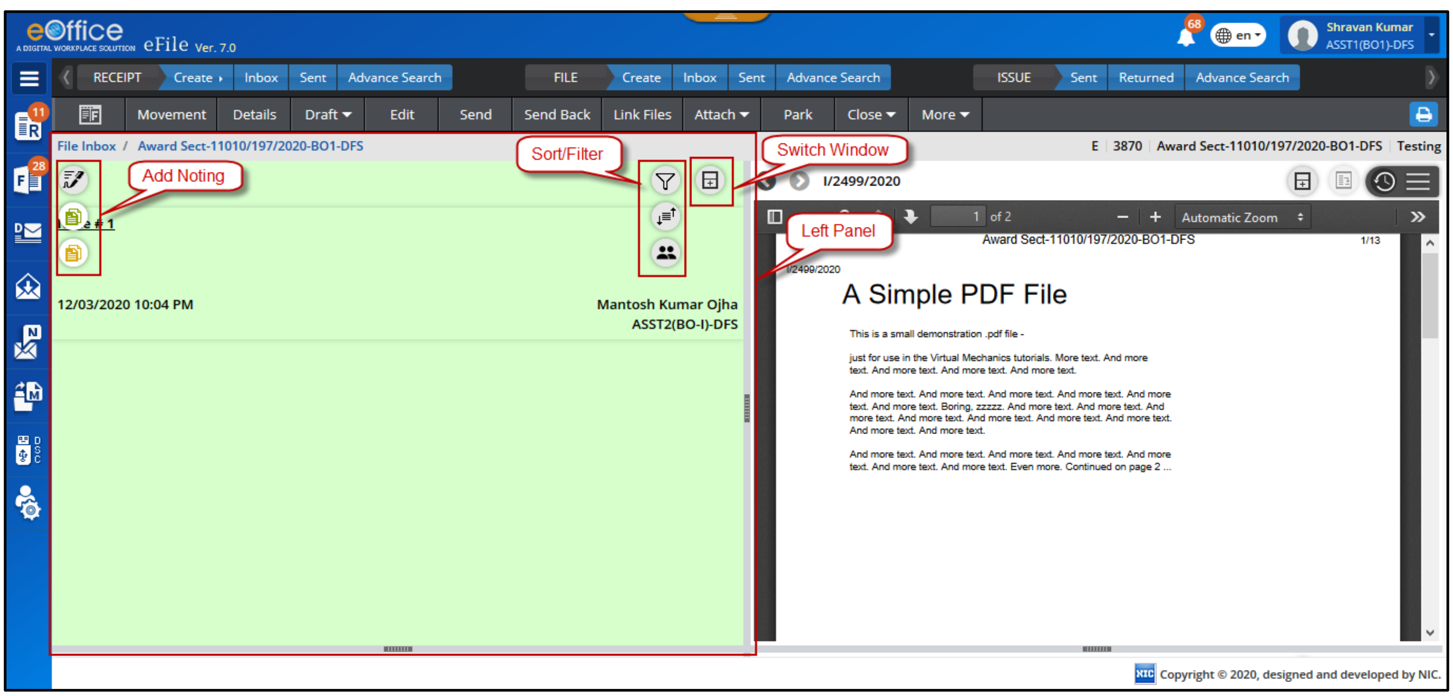


Figure 191

- **Add note:** Clicking on Add Note Icon will display icon to Add Green Note and Add Yellow Note.
    - **Add Green Note:** Opens Green Noting editor page.
    - **Add Yellow Note:** Opens Yellow Noting editor page.
- **Switch View:** Clicking on Switch View Icon switches the view of Noting Panel to Split view panel.
- **Sort/Filter Note:** Clicking in Sort/Filter note Icon display icon to Sort by ASC/DESC and Sort By Post.
    - **Sort by ASC/DESC:** Clicking on Icon will sort noting by Note no., in Ascending or Descending order.
    - **Sort by Post:** Clicking on Icon will display post of all users mentioned in Green Note and selecting one of them will display noting of selected post.

Actions on Right Panel

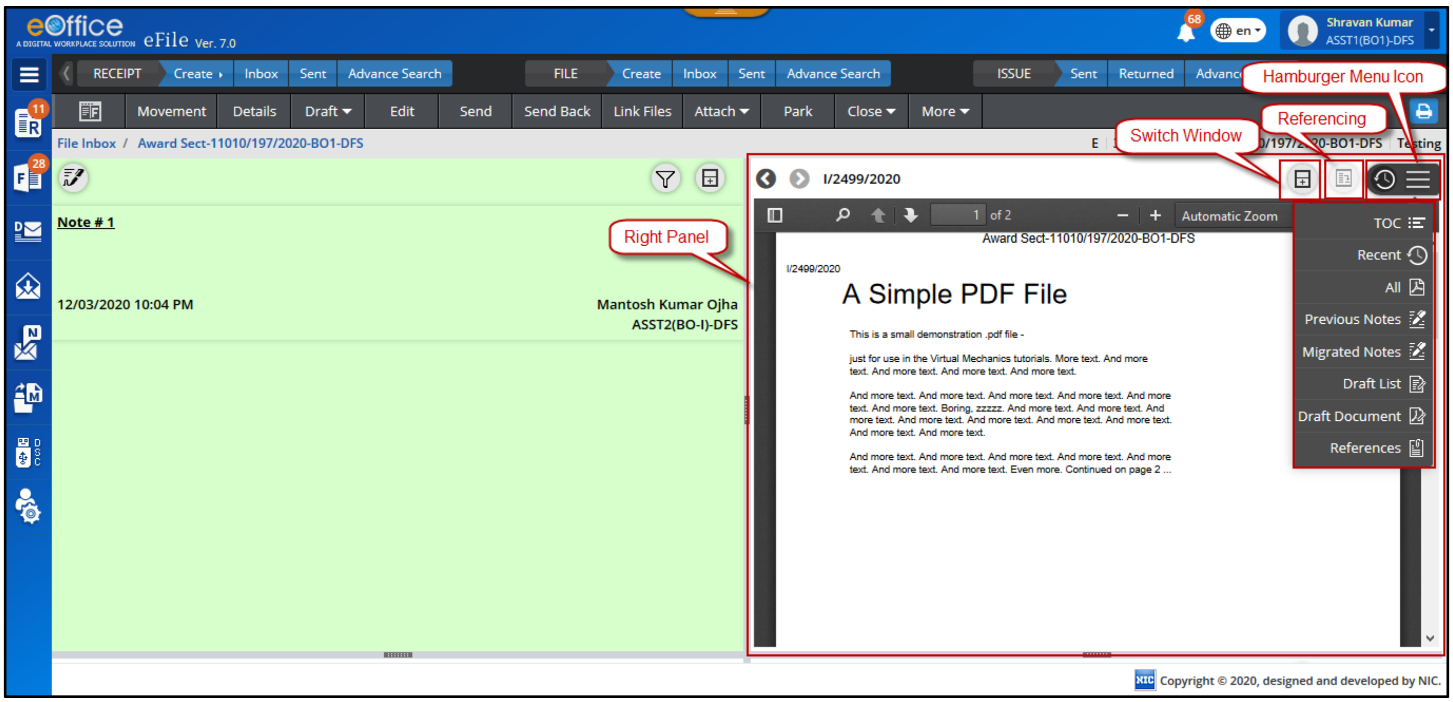


Figure 192

- **Switch View:** Clicking on Switch Window Icon switches view of Correspondence Panel to Split view panel.
- **Referencing Icon:** Clicking on Reference Icon will provide option to refer previous note or attached correspondence in Green or Yellow note in file.

Note:

Referencing Icon will be active only on selection of text in Green/Yellow Note Editor and only if Correspondence or Previous Noting is available in File.

- **Action Menu dropdown list (Hamburger menu Icon):** Clicking on Action Menu dropdown list will display dropdown list of menus (TOC, Recent, All, Previous Noting, Migrated Noting, Draft List, Draft Document and References)

- **ToC (Correspondence List):** Clicking ToC menu icon will open List of Correspondence attached within a File.
- **Recent:** Clicking on Recent menu icon will display latest attached correspondence in PDF format with option to navigate all the attached correspondences.
- **All:** Clicking on All menu icon will display all attached correspondence in PDF format.
- **Previous Noting:** Clicking on Previous Noting menu icon will display all Previous Noting.
- **Migrated Noting:** Clicking on Migrated Noting menu icon will display Noting uploaded during File Migration.

Note:

Migrated Noting menu will be visible only for Migrated File having migrated Green Note.

- **Draft List:** Clicking on Draft List menu icon will display list of all drafts along with draft version list.
- **Draft Document:** Clicking on Draft document menu icon will display latest draft.
- **References:** Clicking in Reference menu icon will display list of all attached local References.

Physical File Inner Page

Physical File Inner pages displays Nature of File, Computer No., File No., Subject, Correspondence panel and various menus to work on file.

Physical File Inner page can be opened by clicking on File no. link from various list pages viz. Inbox/Inbox Folder/Created/Parked Folder.

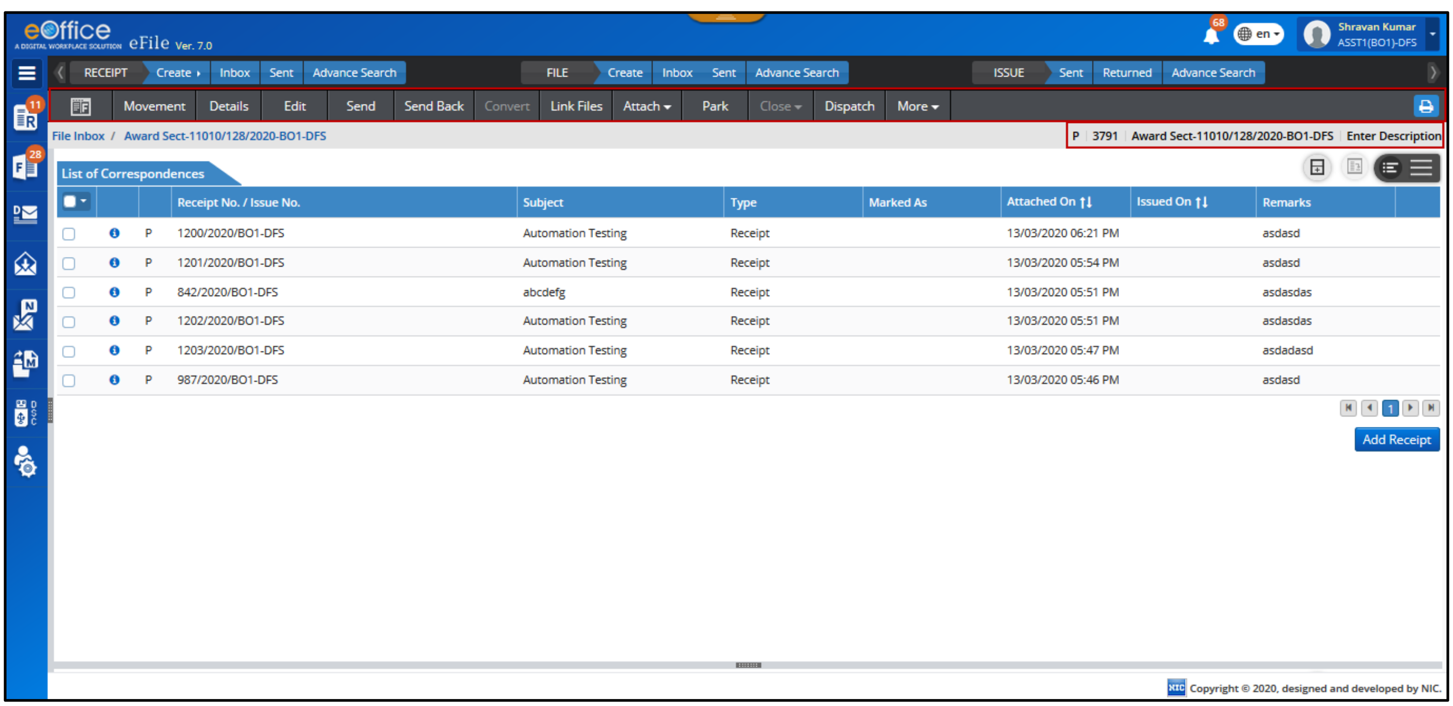


Figure 193

Actions on File Inner Page

Action on Menu Bar

- **File Home Page:** Clicking **File homepage Icon** will display ToC/Recent Correspondence (As per preference setting) on Right Panel.
- **Movements:** Clicking **Movements** will open Movement page of File
- **Details:** Clicking **Details** will open Detail Page of File.
- **Edit:** Clicking **Edit** will open File Cover Page to edit meta data of File.
- **Send:** Clicking **Send** will open Send page of File.
- **Send Back:** Clicking **Send Back** will open file send page with name of Sender of File auto populated in '**To**' Field.
- **Convert:** Clicking **Convert** will open File conversion page to convert physical file to Electronic File
- **Link:** Clicking Link Menu will open **Linked Files** List with option to Link Files.
- **Attach:** Clicking sub menu **Attach File/Attach Receipt** of **Attach File** menu will open File/Receipt Attachment Page.
- **Park:** Clicking **Park** Menu of file will open popup to move File to Parked Folder.
- **Close:** Clicking submenu (**Close/ Send for Approval**) of Close will open popup to take necessary action.
- **Dispatch:** Clicking **Dispatch** will open dispatch page of File.
- **More:** Clicking **More** action menu will display following menus in drop-down.
  - **Action Detail:** Clicking Action Detail will open Initiated Action detail Page.
  - **Create Part:** Clicking on Create Part will open Part File creation page.
  - **Create Volume:** Clicking on Create Volume will open File Volume creation Page.
  - **Merge:** Clicking on **Merge** will display **Merge File** and **Merge Detail** sub menu.
    - **Merge File** sub menu will open File Merging Page with option to select physical files and merge.
    - **Merge Detail** will open details of merged File with option to Demerge or Merge with another.
- **Print/Download:** Clicking on **Download** will display a Print/Download page to View or Download Complete/Customized File, Correspondences, Local Reference, Movement History and Action Detail.

Note:

- Menus/Action Buttons which are not applicable in currently opened file will remain Inactive.

Actions on Correspondence Panel

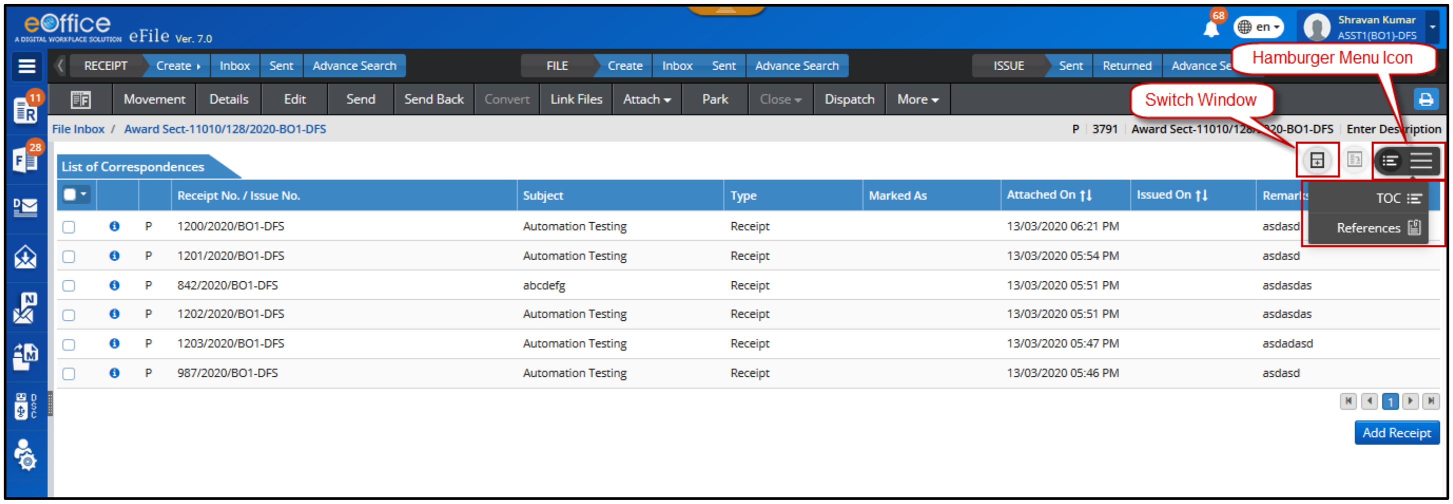


Figure 194

- **Switch View:** Clicking **Switch Window Icon** switches view of Correspondence Panel to Split view panel.
- **Action Menu dropdown list (Hamburger menu Icon):** Clicking Action Menu dropdown list will display dropdown list of menus (TOC and References)
    - **ToC (Correspondence List):** Clicking ToC menu icon will open List of Correspondence attached within a File.
    - **References:** Clicking in Reference menu icon will display list of all attached local References.

Add Correspondence in File

User can add correspondences in both Electronic and Physical File Inner page opened from File Inbox/Inbox Folder/Created/Parked Folder and take various actions on attached correspondence.

Add Correspondence in Electronic File

User can attach eReceipt diarized in eOffice to an eFile opened from Inbox/ Inbox Folder/ Created/ Parked through following process.

STEPS TO FOLLOW:

1. Click **ToC** menu from Action Menu Dropdown list in the right panel of file inner page. (Configurable using user preference setting to view correspondence list by default).

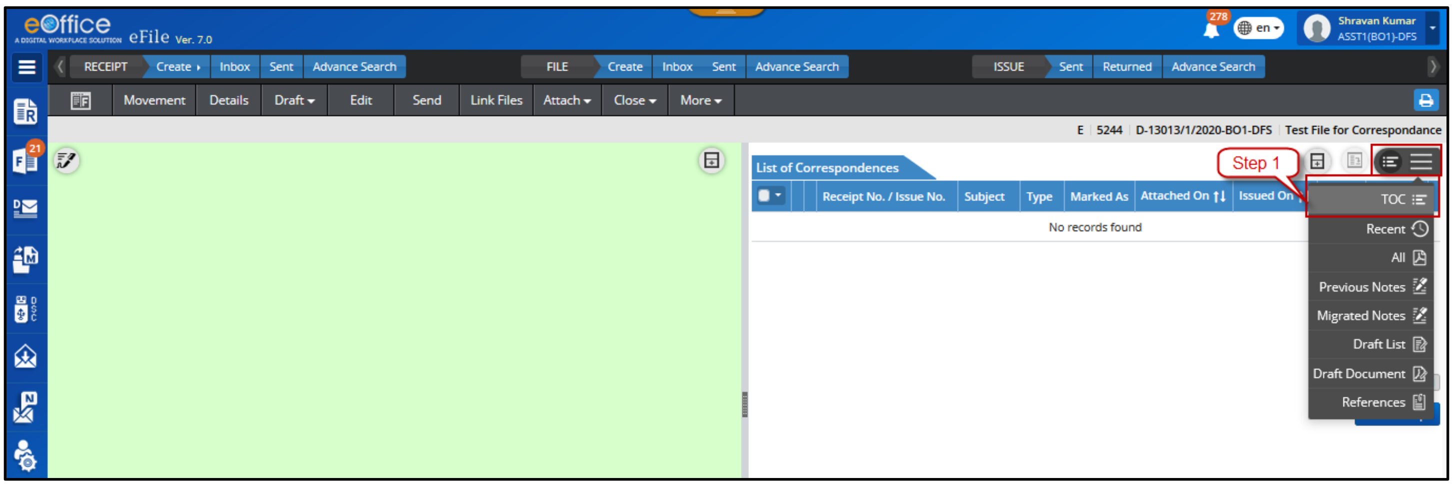


Figure 195

2. Click **Add Receipt** action button.

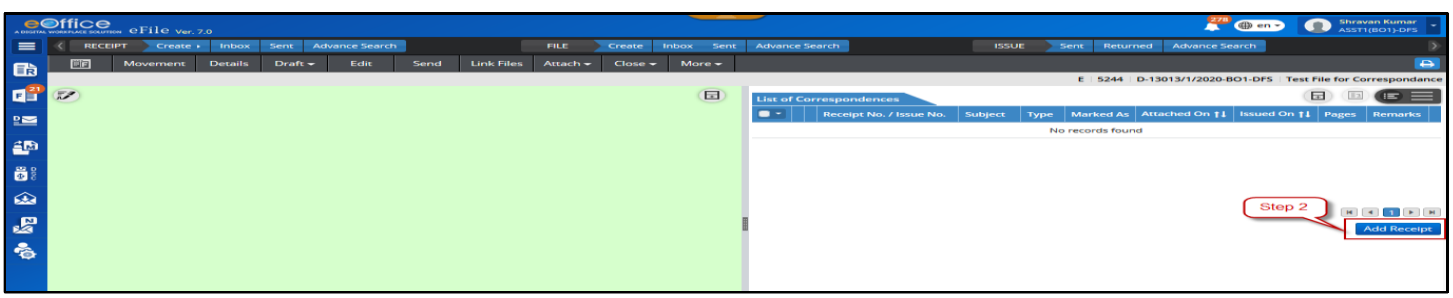


Figure 196

3. Select receipt from year wise sorted list of Electronic Receipt.
4. Provide mandatory **Remark**.
5. Click **Attach** to attach selected receipt in File.

List of all the attached correspondences (Issues and eReceipt) will be displayed in ToC.

Note:
- Latest correspondences (receipt/issue) will be displayed on top the list

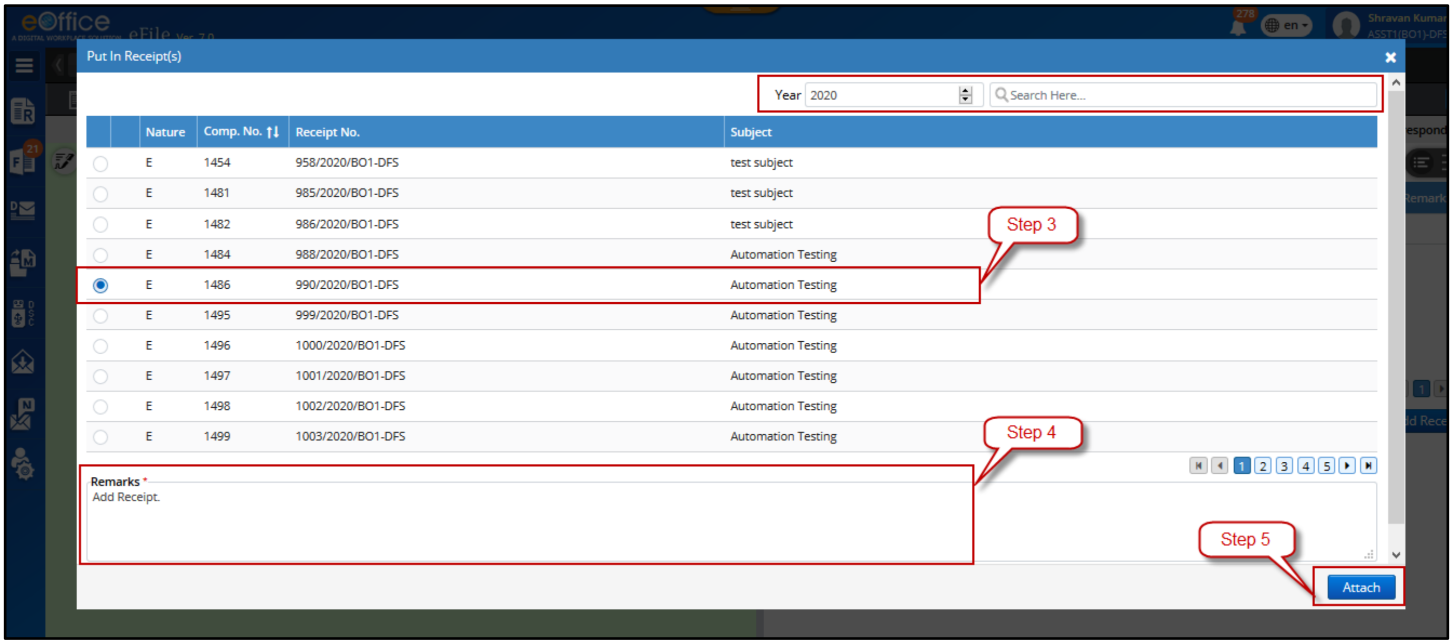
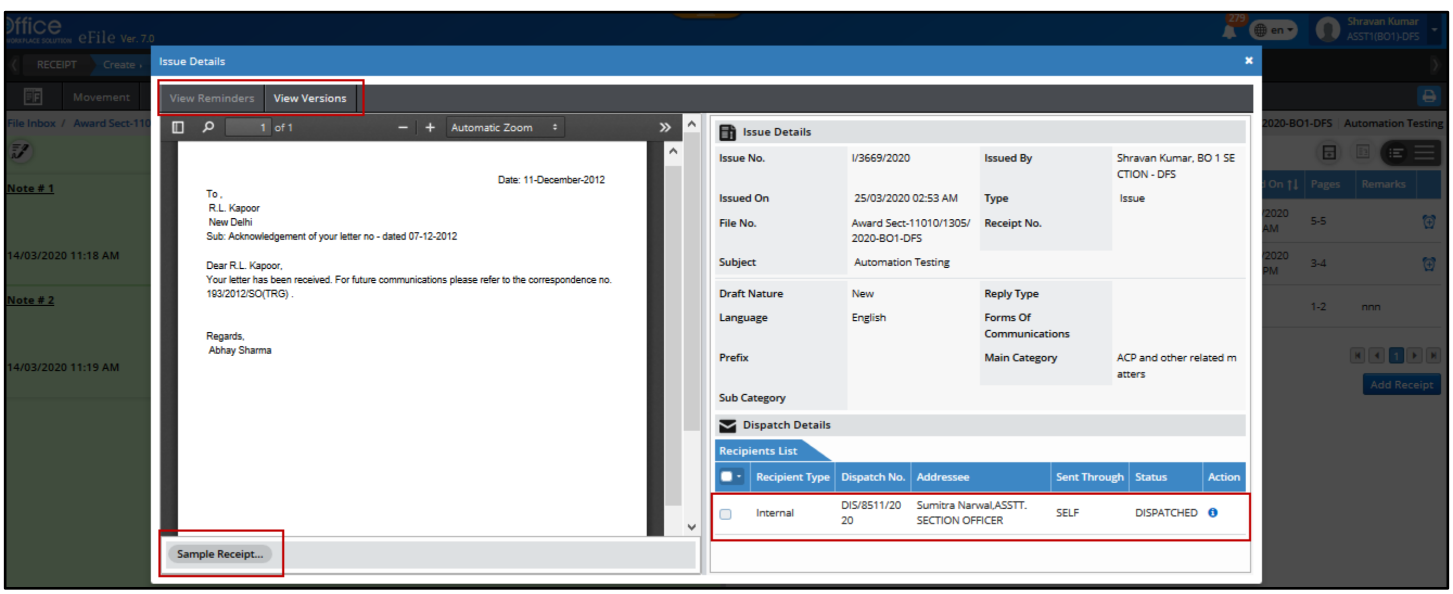


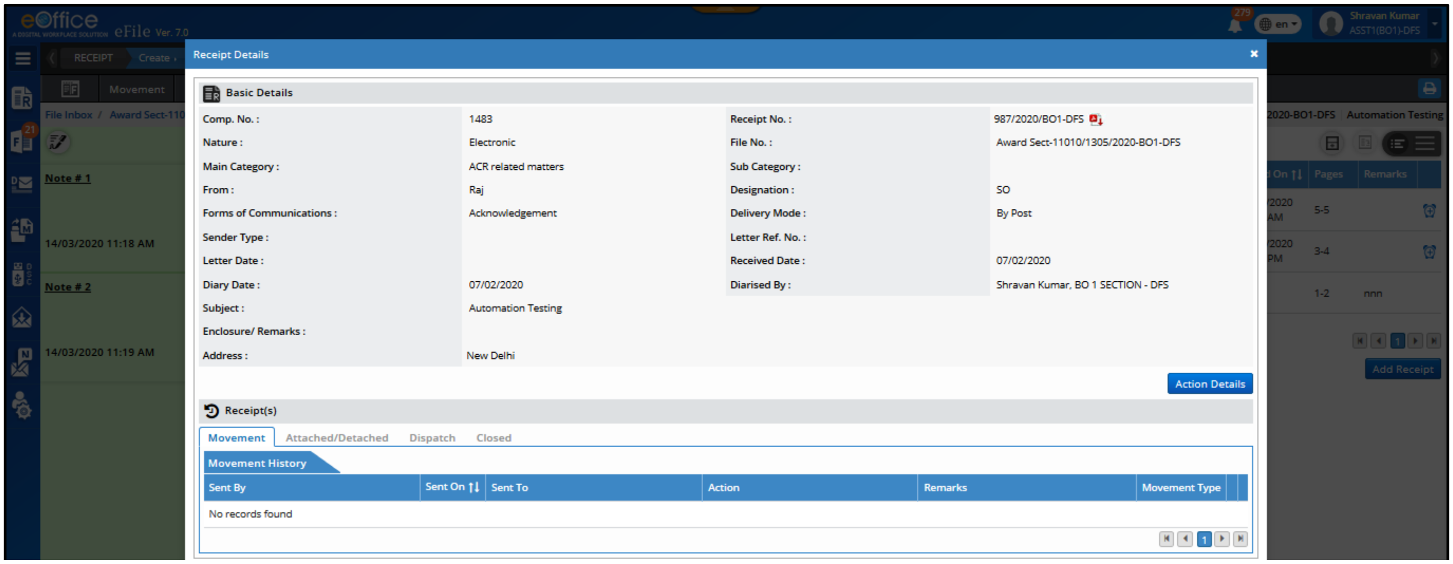
Figure 197

Action on ToC List

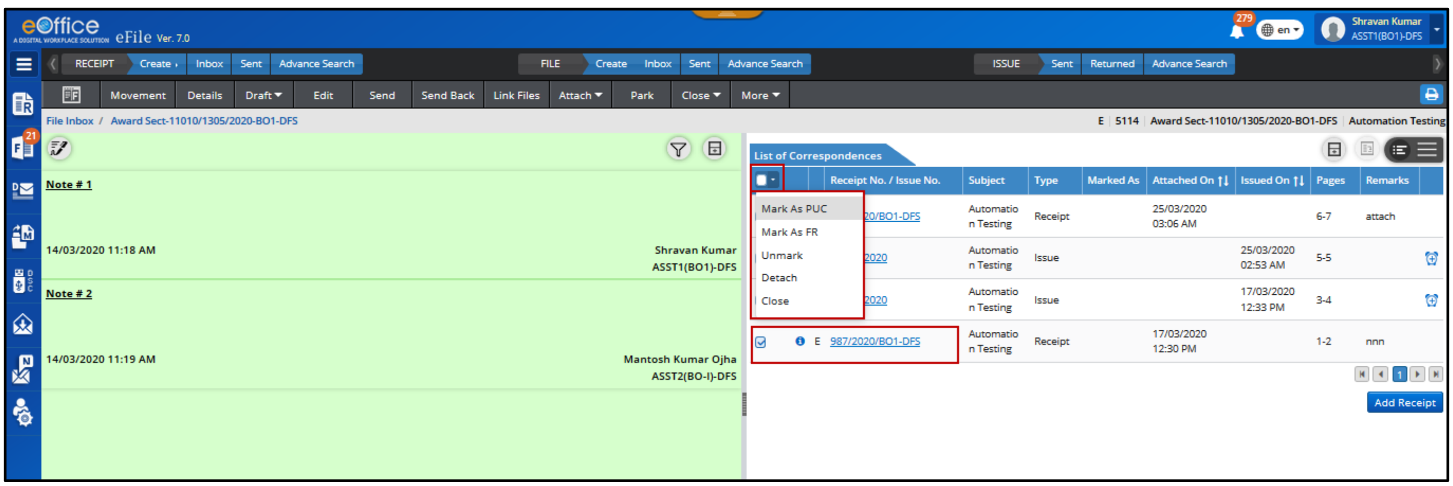
- Issue details, Dispatch Details (with option to View Remainders, View Versions of Issue, Download Issue Attachments, Print envelope and View details of specific dispatch), Dispatched Document (PDF) along with Attachment in respective Issue can be viewed by clicking on information icon adjacent to attached Issue.



- Basic details, Dispatch History and movement of the receipts can be viewed by clicking on information icon adjacent to attached receipt.



- Content of the receipts can be viewed by clicking on Receipt No. link.
- Action on receipts like (Detach, Close, Mark (as PUC, FR), Unmark, Reopen etc.) can be taken from correspondence list view.



- **Close:** Selecting a receipt from Correspondence list using check box and clicking Close from action menu drop down, displays closing confirmation pop up. Giving closing confirmation and clicking on OK, closes the receipt.

> **Note:**
> - Reopen link becomes active once a receipt is closed in Correspondence list.
> - Not applicable for Issues.

- **Detach:** Selecting a receipt from Correspondence list using check box and clicking Detach from action menu drop down, displays detach confirmation pop up (when there is no movement of file after the selected receipt was put in). Clicking OK will detach the receipt.

> **Note:**
> - Detach receipt will be removed from Correspondence list along with its Issues (if any).
> - Receipt will only be detached if there is no movement of File after the selected receipt was put in.

- Not applicable for Issues.

- **Mark as PUC:** Selecting an unmarked receipt in Correspondence list using check box and clicking **Mark as PUC**, the receipt is marked as PUC.

Note:

- Not applicable for Issues and closed receipt.

- **Mark as FR:** Selecting an unmarked receipt in Correspondence list using check box and clicking Mark as FR, provision of FR mapping with PUC is displayed. User can select PUC No. from the list of PUCs from dropdown list and click **Mark** action button to mark the receipt as FR.

Note:

- Not applicable for Issues and closed receipt.

- **Unmark:** Selecting a marked (FR/PUC) receipt in Correspondence list using check box and clicking **Unmark**, the receipt is unmarked.

Note:

- Not applicable for Issues.

- **Reopen:** Click **Reopen** link/Icon, displays the receipt reopen confirmation pop up. Entering reopening remark and clicking OK, reopens the receipt.

Note:

- Once receipt is reopened, Selection check box is made active and Reopen Icon is made inactive.

- Action on issues like Create Reminders can be taken from correspondence list view.
  - **Create Reminder:** Click **Reminder** link/Icon for Issue, displays the View Reminder window with the Issue Details and Reminder list and details,

Note:

- Applicable only for Issues.

- Further receipt can be attached in correspondence list using Add Receipt feature.

Add Correspondence in Physical File

User can attach pReceipt/eReceipt diarized in eOffice to a pFile opened from Inbox/ Inbox Folder/ Created/ Parked through following process.

STEPS TO FOLLOW:

1. Click **Add Receipt** action button.

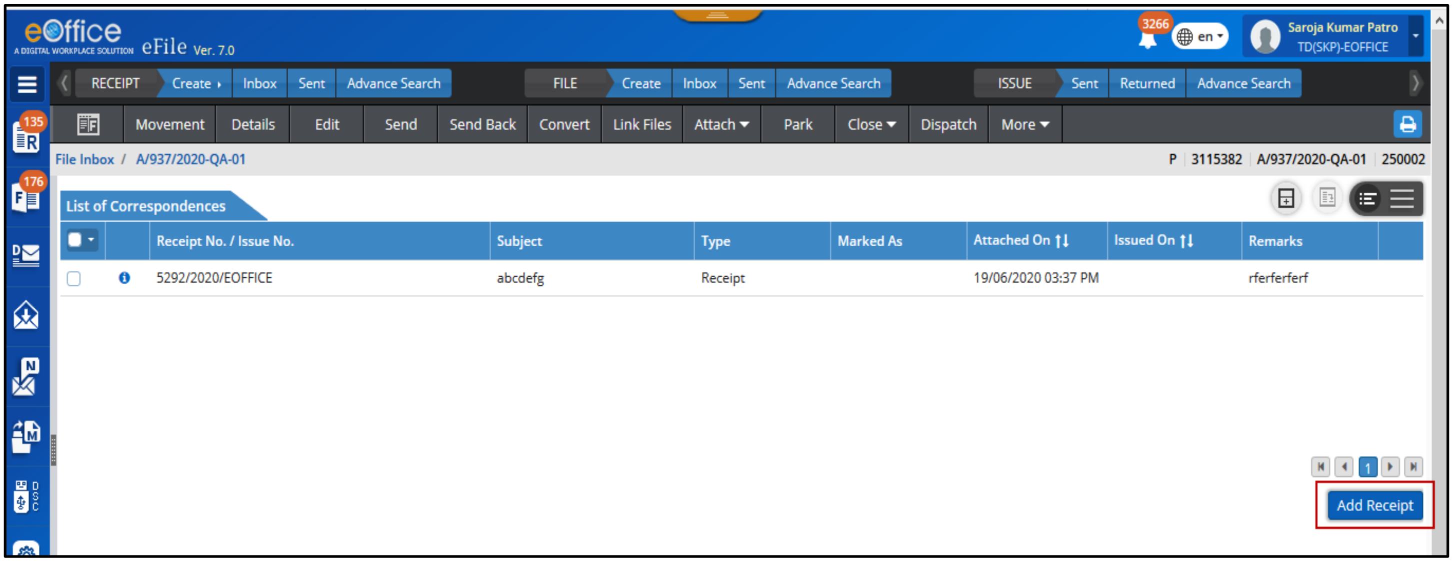


Figure 198

2. Select receipt from year wise sorted list of Physical/Electronic Receipt.
3. Provide mandatory **Remark**.
4. Click **Attach** to attach selected receipt in File.

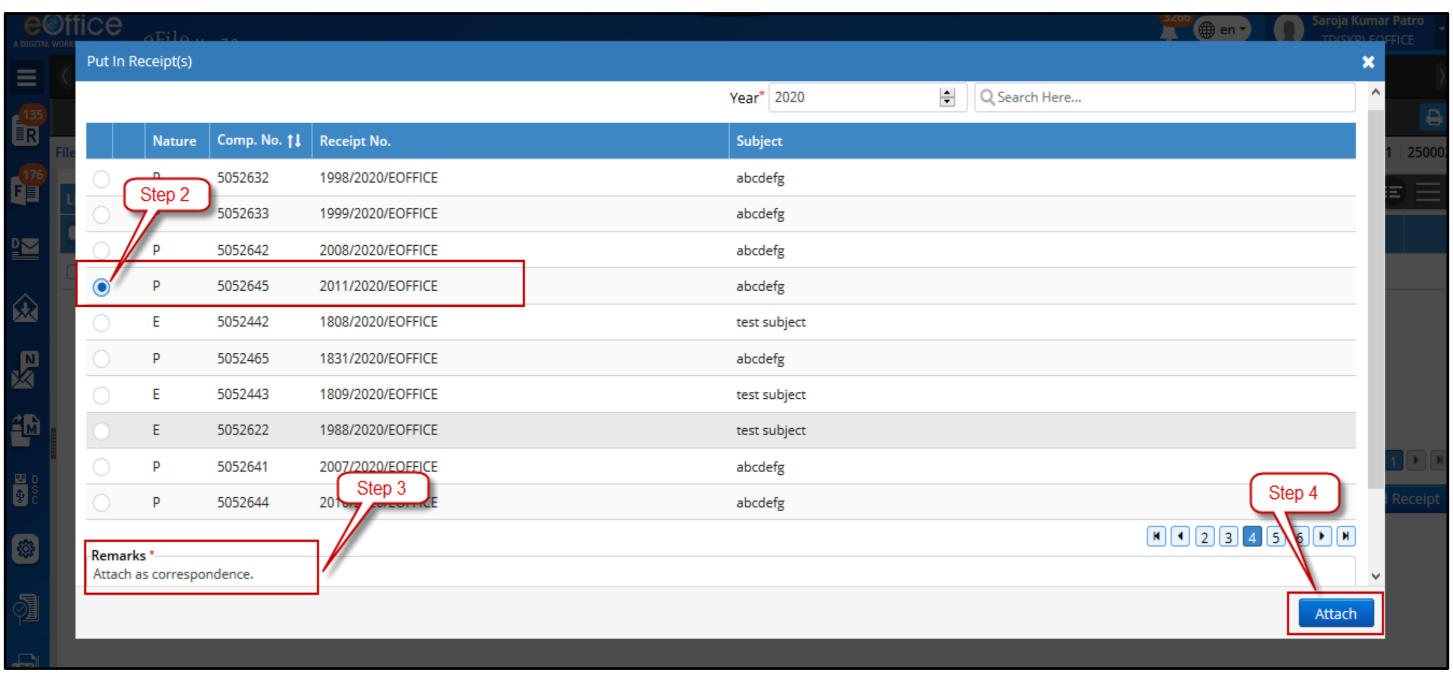


Figure 199

List of all the attached correspondences (Issues, eReceipt, pReceipt) will be displayed in ToC.

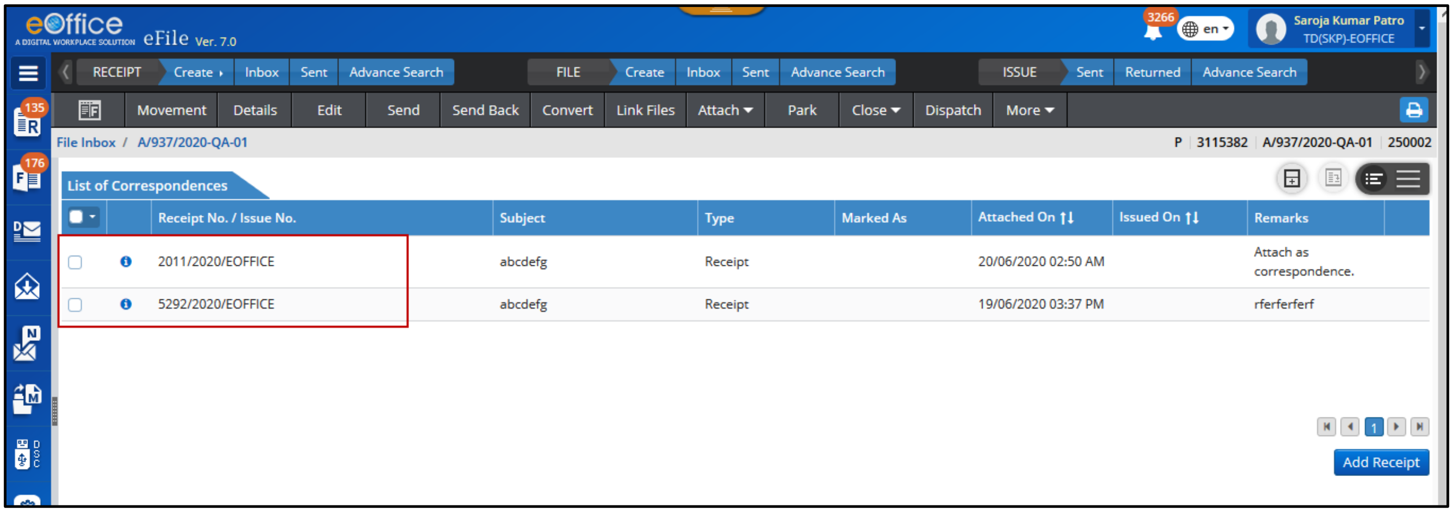


Figure 200

Note:

- Latest correspondences (receipt/issue) will be displayed on top the list

Action on ToC List

- Attachments of the issues can be viewed by clicking on attachment icon.
- Issue details, Dispatch Details (with option to print envelope and view details of specific dispatch), Dispatched Document (PDF) along with Attachment in respective Issue can be viewed by clicking on information icon adjacent to attached Issue.
- Basic details, Dispatch History and Movement of the receipts can be viewed in popup window by clicking on information icon adjacent to attached receipt.
- Action on receipts like (Detach, Close, Mark (as PUC, FR), Unmark, Reopen etc.) can be taken from correspondence list view.
- Attachments of the issues can be viewed by clicking on attachment icon.
- Issue details, Dispatch Details (with option to print envelope and view details of specific dispatch), Dispatched Document (PDF) along with Attachment in respective Issue can be viewed by clicking on information icon adjacent to attached Issue.
- Basic details, Dispatch History and movement of the receipts can be viewed by clicking on information icon adjacent to attached receipt.
- Content of the receipts can be viewed by clicking on Receipt No. link.
- Action on receipts like (Detach, Close, Mark (as PUC, FR), Unmark, Reopen etc.) can be taken from correspondence list view.

- **Close:** Selecting a receipt from Correspondence list using check box and clicking Close from action menu drop down, displays closing confirmation pop up. Giving closing confirmation and clicking OK, closes the receipt.

> **Note:**
> - Reopen link becomes active once a receipt is closed in Correspondence list.
> - Not applicable for Issues.

- **Detach:** Selecting a receipt from Correspondence list using check box and clicking Detach from action menu drop down, displays detach confirmation pop up (when there is no movement of file after the selected receipt was put in). Clicking OK will detach the receipt.

> **Note:**
> - Detach receipt will be removed from Correspondence list along with its Issues (if any).
> - Receipt will only be detached if there is no movement of File after the receipt was put in.
> - Not applicable for Issues.

- **Attach With Another:** Selecting a receipt from Correspondence list using check box and clicking **Attach With Another** from action menu drop down, displays the list of files available with user in which the selected receipt can be put in. Selecting File and Clicking **OK**will attach selected Receipt to respective file.

> **Note:**
> - Selected Receipt is detached from Correspondence list along with its Issues (if any).

- **Mark as PUC:** Selecting an unmarked receipt in Correspondence list using check box and clicking **Mark as PUC**, the receipt is marked as PUC.

> **Note:**
> - Not applicable for Issues and closed receipt.

- **Mark as FR:** Selecting an unmarked receipt in Correspondence list using check box and clicking Mark as FR, provision of FR mapping with PUC is displayed. User can select PUC No. from the list of PUCs from dropdown list and click **Mark** action button to mark the receipt as FR.

> **Note:**
> - Not applicable for Issues and closed receipt.

- **Unmark:** Selecting a marked (FR/PUC) receipt in Correspondence list using check box and clicking **Unmark**, the receipt is unmarked.

> **Note:**
> - Not applicable for Issues.

- **Reopen:** Click **Reopen** link/Icon, displays the receipt reopens confirmation pop up. Entering reopening remark and clicking OK, reopens the receipt.

Note:

- Once receipt is reopened, Selection check box is made active and Reopen Icon is made inactive.

- Action on issues like Create Reminders can be taken from correspondence list view.
    - **Create Reminder:** Click **Reminder** link/Icon for Issue, displays the View Reminder window with the Issue Details and Reminder list and details,

Note:

- Applicable only for Issues.

- Further receipt can be attached in correspondence list using Add Receipt feature.

Add Noting

This feature is required to add Green or Yellow Note in an electronic file opened from File Inbox/Inbox Folder/ Created/ Parked.

Add Green Note

In order add green note in an electronic file user needs to follow following steps.

STEPS TO FOLLOW:

1. Click '**Add Note'** icon to expand and then click **'Green Note'** Icon in noting panel of electronic file inner page.

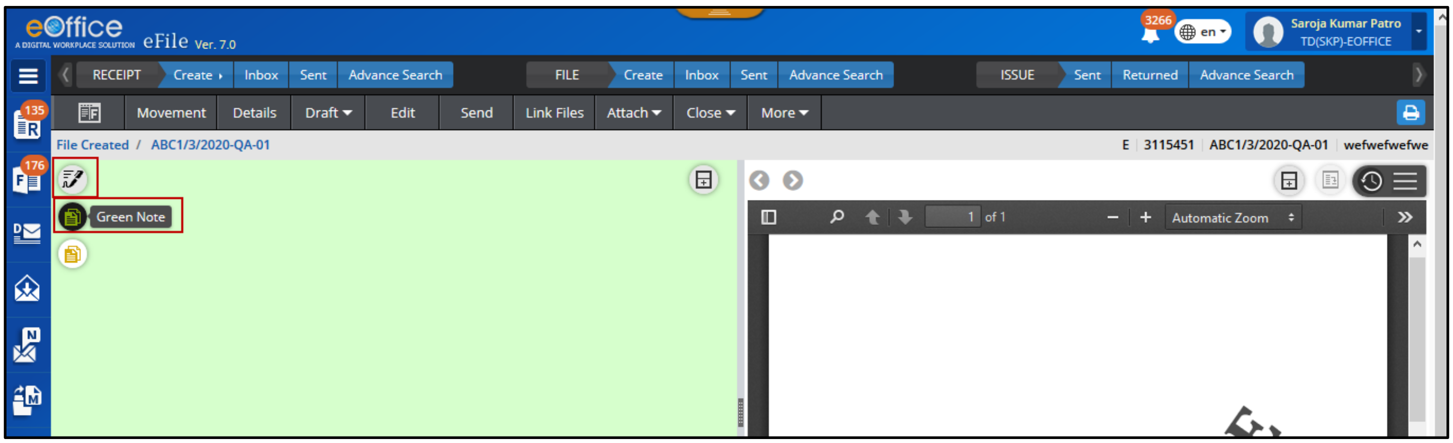


Figure 201

Note:

- User will be able to select Standard/ User defined Quick noting (English, Hindi, Other language) by Clinking on respective Sub Menu of Quick Noting action button available in Note Action Header.
- Option to Discard, Save and upload Attachment will be available for green note.

2. Enter either text by typing or paste copied data (text, hyperlink and image) in the web editor or inserts table (using editor toolbar).

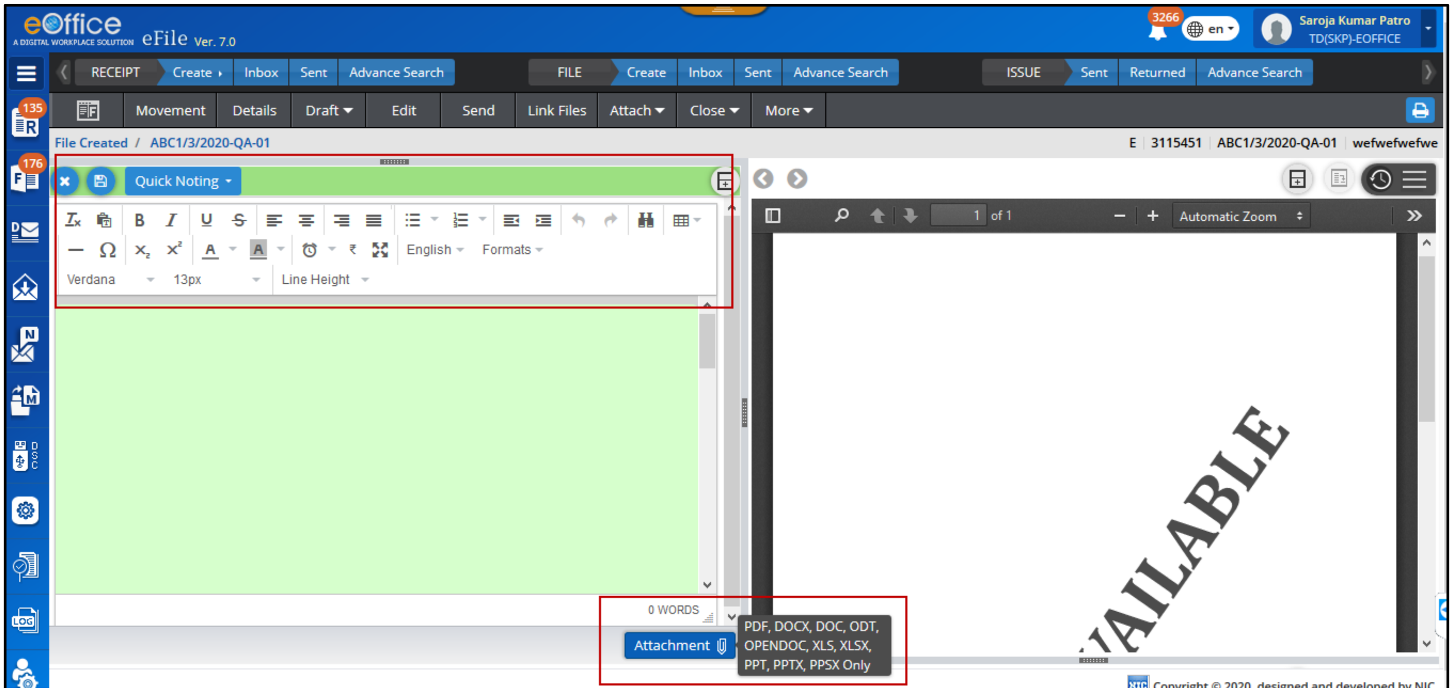


Figure 202

Note:

- Pasted content having hyperlinked data/URLs should be saved as plain text.

3. Click **Attachment** icon to attach document (PDF, DOCX, DOC, ODT, XLS, XLSX, PPT, PPTX, PPSX format) if require(**Figure 202**).

Note:

- Document attached can be of maximum 25MB.
- Clicking on Attached document will allow the user to download the document.
- Clicking on Remove icon on attached document will remove the attached document.

4. Click **Save** icon to finalize the Green note.

Note:

- Content either typed or copied and pasted from word document in editor should get Auto Saved if not saved by user.
- If Text editor has blank note it will not be Auto saved or Saved.
- Last Saved date and time (dd/mm/yyyy hh:mm:ss AM/PM) should be updated in Note Action Header after getting auto saved.
- Color of Note Action Header should be changed for unsaved (Red) and Saved (Green) note.
- Legends will be displayed in File Inbox/Inbox Folder/Created/Parked list to indicate file having saved Green note.

Edit Saved Green Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list. (Tiny MCE Web editor is displayed in editable mode with existing noting content.)
2. Edit the content either by typing or pasting copied data (text, table, hyperlink and image) or inserting table by using editor toolbar to make changes in the existing note.
3. **Attach** or **Remove** attached document.
4. Click **Save** icon to update the noting

Discard Saved Green Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list. (Tiny MCE Web editor is displayed in editable mode with existing saved noting content.
2. Click **Discard** icon on Note Action Header.
3. Confirm deletion of noting in alert popup. On confirmation, green note will be discarded and blank text editor is displayed with option to Add Note.

Note:

- In case the green note was created by confirming the Yellow note, and if user Discard the green note, then the yellow note from which this green note is confirmed, will be restored along with all the versions of yellow note.

Add Yellow Noting

In order add Yellow note in an electronic file user needs to follow following steps.

STEPS TO FOLLOW:

1. Click '**Add Note'** icon to expand and then click **'Yellow Note'** Icon in noting panel of electronic file inner page.

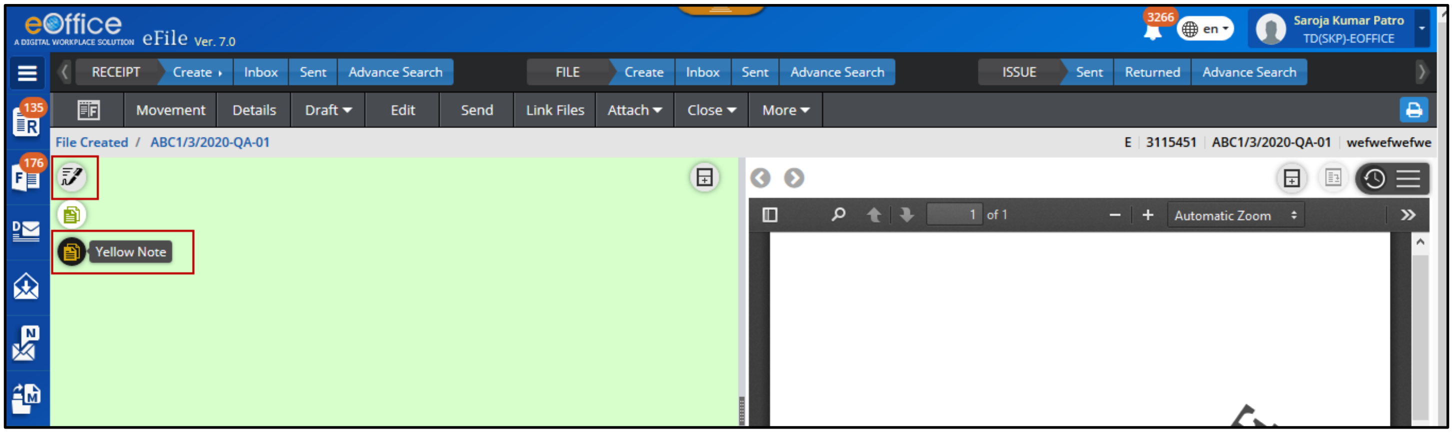


Figure 203

Note:

- User will be able to select Standard/ User defined Quick noting (English, Hindi, Other language) by Clinking on respective Sub Menu of Quick Noting action button available in Note Action Header.
- Option to **Discard, Save** and upload **Attachment** will be available for Yellow note.

2. Enter either text by typing or paste copied data (text, hyperlink and image) in the web editor or inserts table (using editor toolbar).

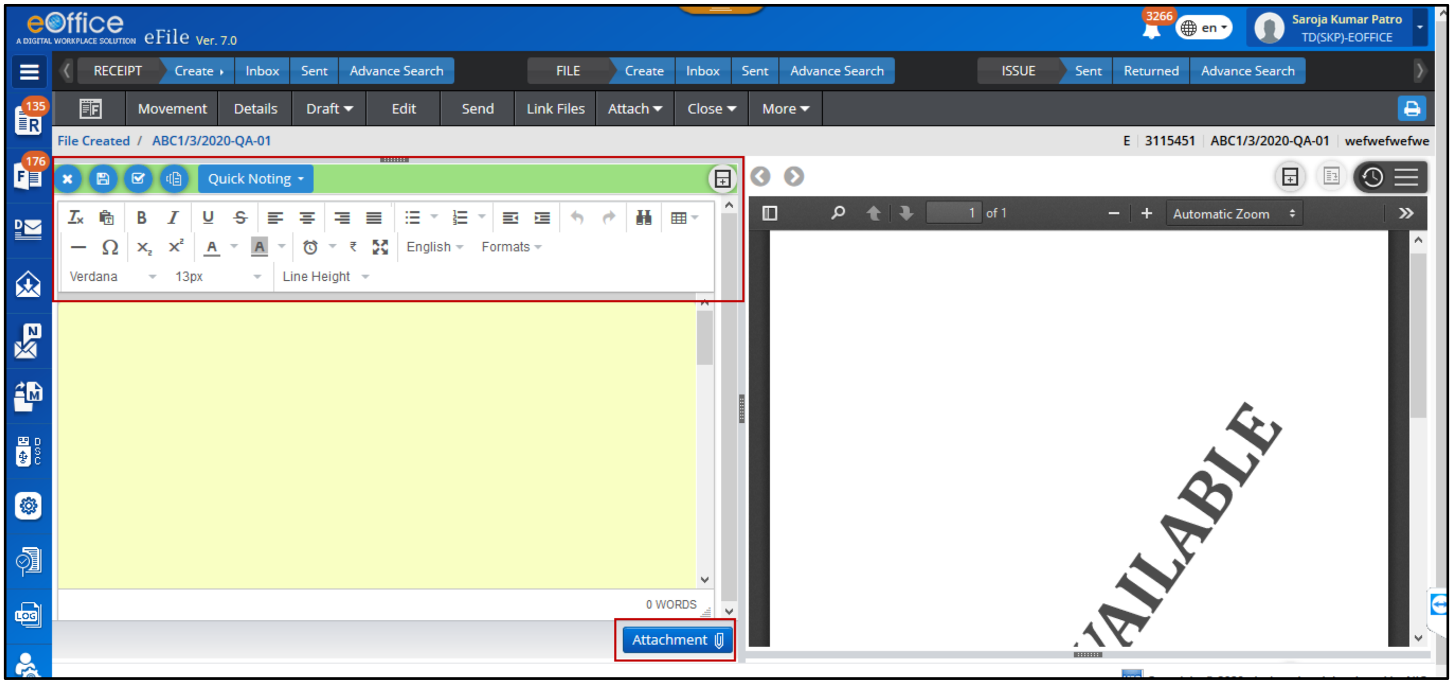


Figure 204

Note:

- Pasted content having hyperlinked data/URLs should be saved as plain text.

3. Click Attachment icon to attach document (PDF, DOCX, DOC, ODT, OPENDOC, XLS, XLSX, PPT, PPTX, PPSX format) if required(**Figure 204**).

Note:

- Document attached can be of maximum 25MB.
- Clicking on Attached document will allow the user to download the document.
- Clicking on Remove icon on attached document will remove the attached document.

4. Click **Save** icon to finalize the Green note (**Figure 204**).

Note:

- Content either typed or copied and pasted from word document in editor should get Auto Saved if not saved by user.
- If Text editor has blank note it will not be Auto saved or Saved.
- Last Saved date and time (dd/mm/yyyy hh:mm:ss AM/PM) should be updated in Note Action Header after getting auto saved.
- Version of Yellow Note will be created once Saved/ Auto Saved.
- Color of Note Action Header should be changed for unsaved (Red) and Saved (Green) note.
- Option of **Confirming** Yellow Note and Viewing Yellow Note **Version** should be available for saved yellow note.
- Legends will be displayed in File Inbox/Inbox Folder/Created/Parked list to indicate file having saved yellow note.

Edit Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list. (Saved Yellow Note is displayed along with its version list)
2. Click **Edit** Icon Note Action Header.

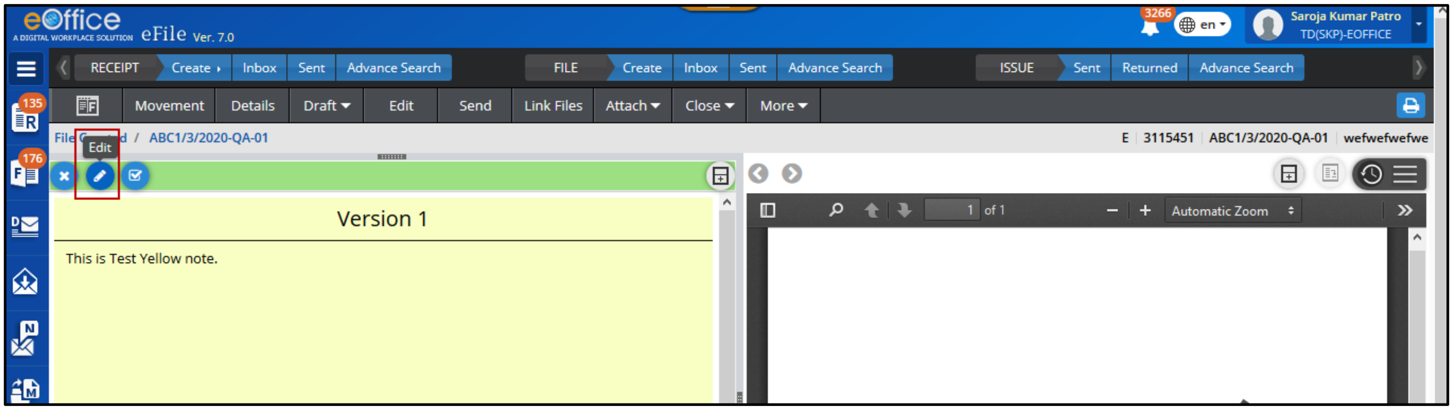


Figure 205

3. Edit the content either by typing or pasting copied data (text, table, hyperlink and image) or inserting table by using editor toolbar to make changes in the existing note.
4. **Attach** or **Remove** attached document.
5. Click **Save** icon to update the noting or **Confirm** Icon to convert it into Green Note.

Note:

- New version will be created only if the previous version available in the file is not created by the same user.

Confirm Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list.
2. Click **Confirm** icon on Note Action Header.

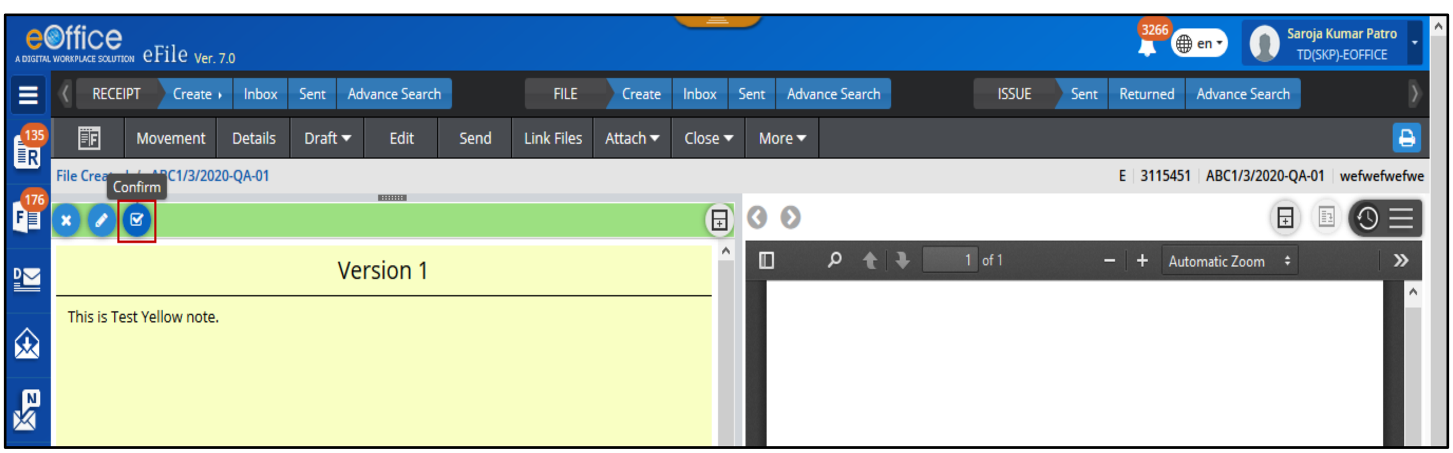


Figure 206

3. Click **OK** in 'Confirm Yellow Note' pop up.

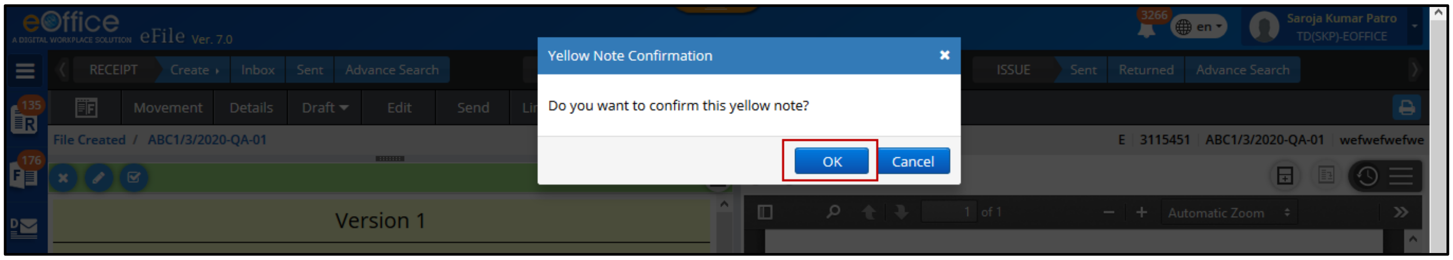


Figure 207

Note:

- Confirmed version of Yellow noting content should be converted to Green noting and displayed in web editor in editable form. (Yellow note versions shall no more be available).
- Option of **Save**, **Discard** and upload **Attachment** should be displayed for Green Note in web editor.

Discard Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list.
2. Click **Discard** icon on Note Action Header or **Discard** icon available in version list page of yellow note.

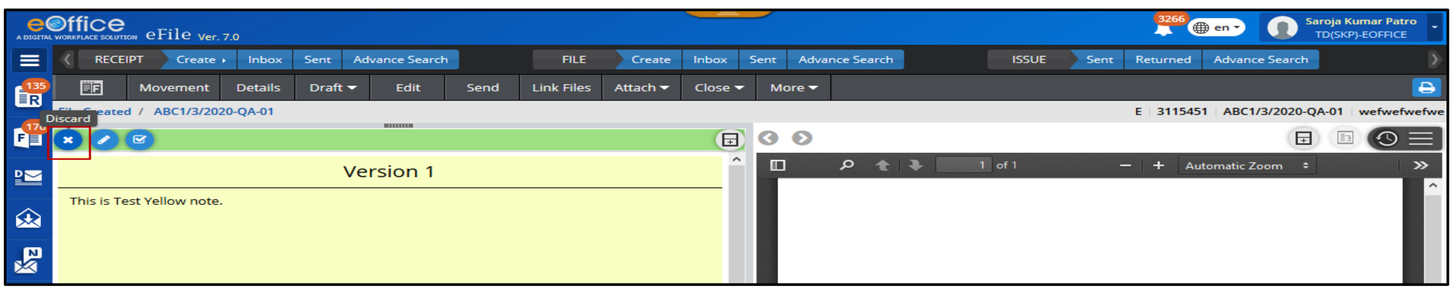


Figure 208

3. Click OK to Confirm deletion of noting in alert popup. On confirmation, Yellow note will be discarded and blank text editor is displayed with option to Add Note.

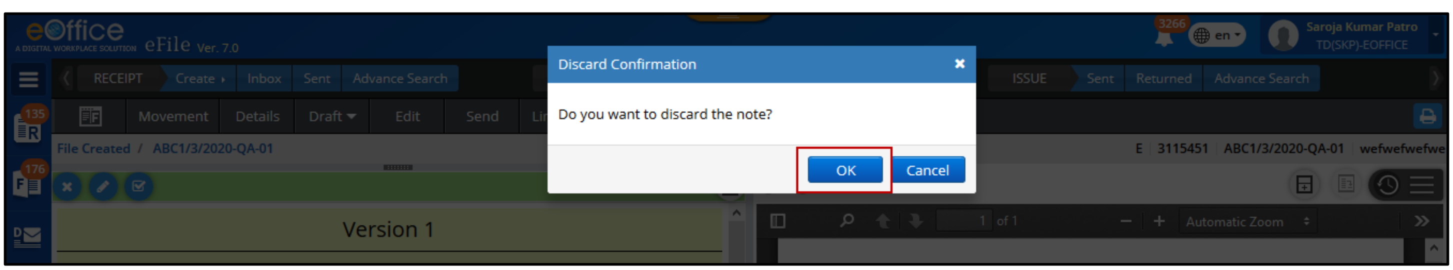


Figure 209

Note:

- **Discard** icon will be available for self-created version in version list page of yellow note.
- In case the green note was created by confirming the Yellow note, and if user **Discard** the green note, then the yellow note from which this green note is confirmed, will be restored along with all the versions of yellow note.

View version of Yellow Note

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list. (*By Default, yellow note is displayed along with all its versions*).

2. While working on Yellow Note editor page, Click **Version** icon on Note Action Header to view all its versions.

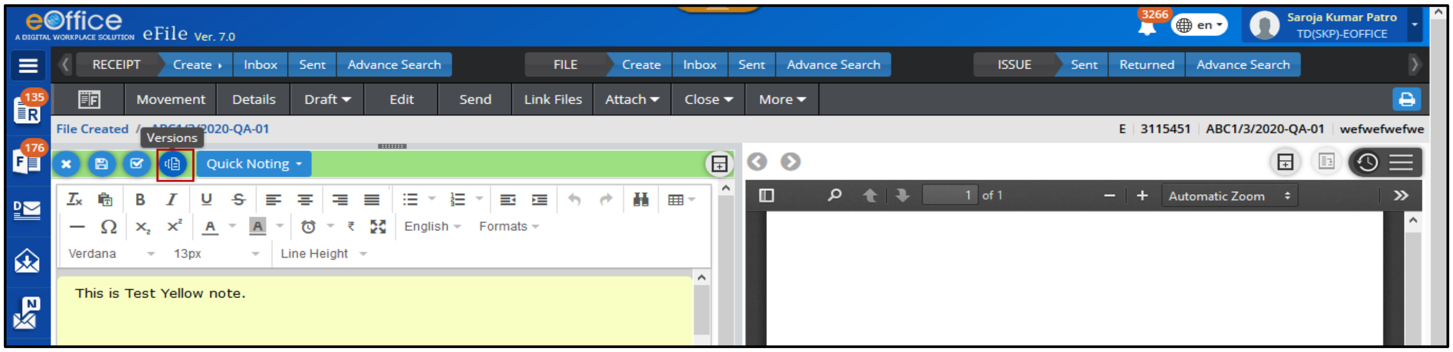


Figure 210

Note:

- New version will be created only if the previous version available in the file is not created by the same user.
- In case, a version is created by User 1 and file is send to User 2 but User 2 did not make any changes in the yellow note, and sent the file back to User 1. In this case, if User 1 edits the previously created latest version, no new version will be created.
- In case User 1 edits any other version except the previously created latest version, all the changes will be reflected in the previously create latest version by him.

Refer a Correspondence in a Green/Yellow Note

There are two different ways to refer a correspondence in a Noting.

STEPS TO FOLLOW:

Scenario 1

1. Selects content in Green Noting/Yellow Noting in text editor.
2. Open **Recent** or **All** correspondence in Right Panel of File inner page.
3. Right click correspondence page (to be referenced) and selects 'Refer this Page' option from context menu.

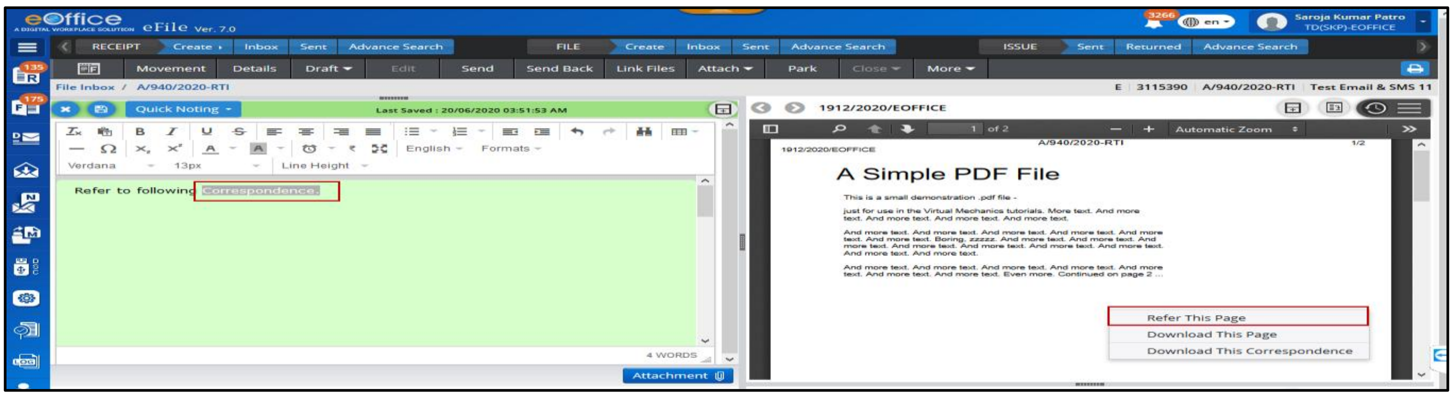


Figure 211

Scenario 2

1. Select content in Green Noting/Yellow Noting in text editor.
2. Click the **Referencing** icon.

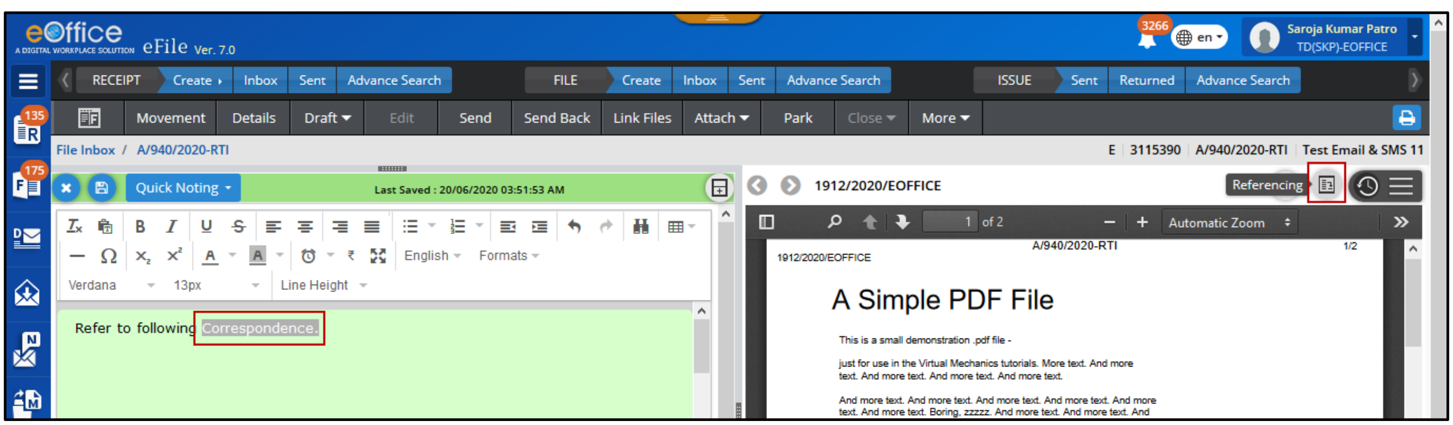


Figure 212

3. Enters page number of correspondences that is to be referred.
4. Clicks **OK** to refer to specific page of Correspondence.

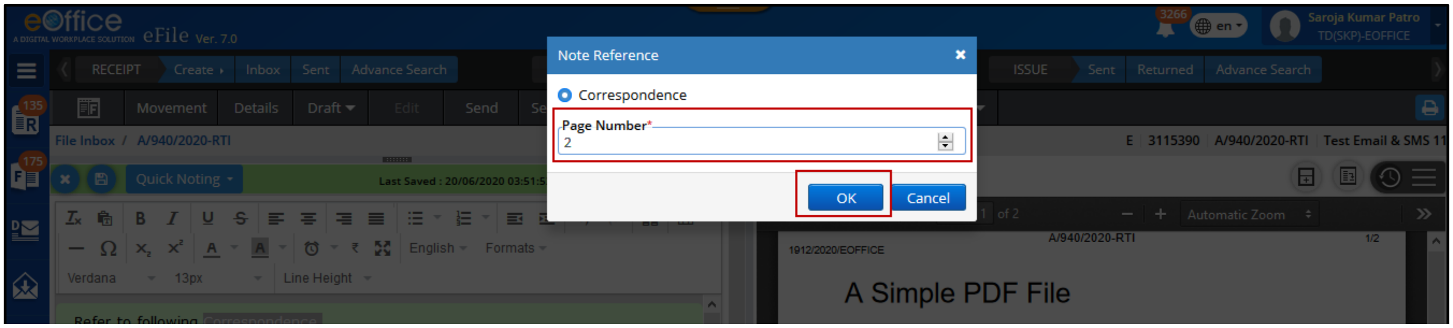


Figure 213

Note:

- **Referencing Icon**will be Active only on selection of text in Green/Yellow Note Editor and only if Correspondence or Previous Noting is available in File.
- **Refer this Page** context Menu will be available only on selection of text in Green/Yellow Note Editor and only if Correspondence or Previous Noting is available in File.
- **Referred content** will be displayed as Hyperlink (Underlined and in Blue Color), clicking on which will display the referred page in a popup window.

Refer a Previous Note in a Green/Yellow Note

There are two different ways to refer a previous note in a Noting.

STEPS TO FOLLOW:

Scenario 1

1. Selects content in Green Noting/Yellow Noting in text editor.
2. Right click Previous Noting which is to be referred (previous noting in noting panel or previous notings accessed in right ToC panel) and selects either **'Refer this Note'** or **'Refer this Paragraph'** option from context menu to refer previous noting.

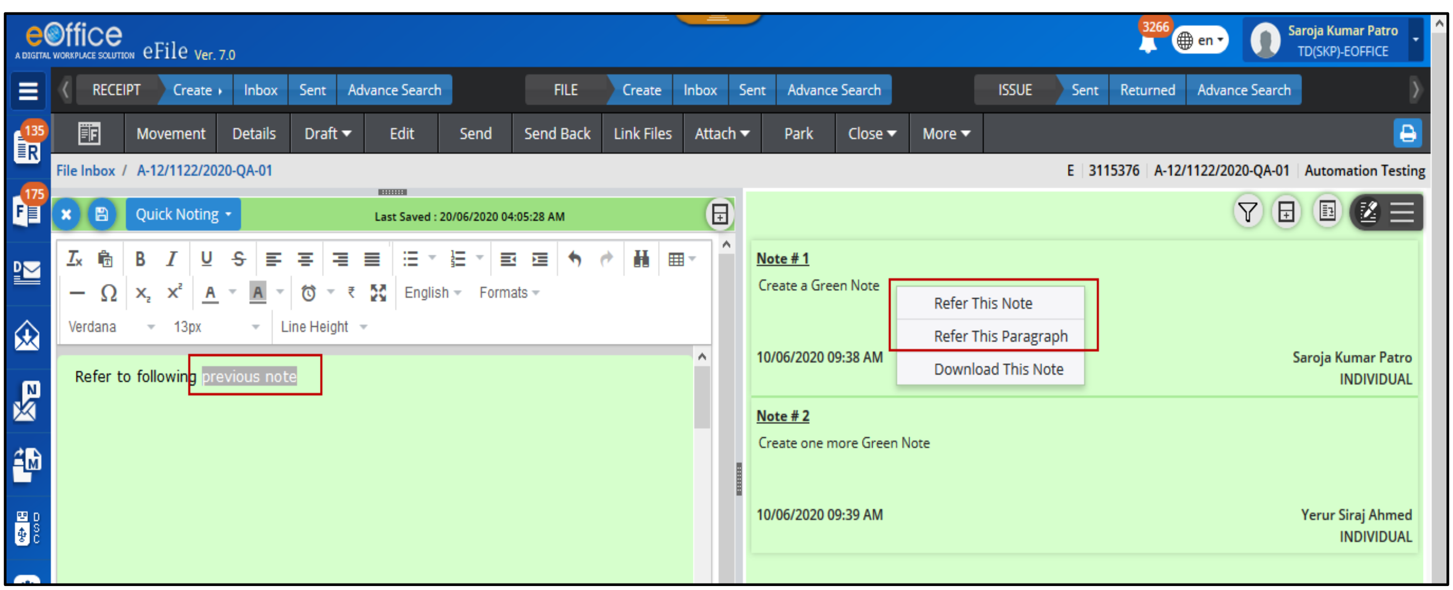


Figure 214

Scenario 2

1. Select content in Green Noting/Yellow Noting in text editor.
2. Click the **Referencing** icon.

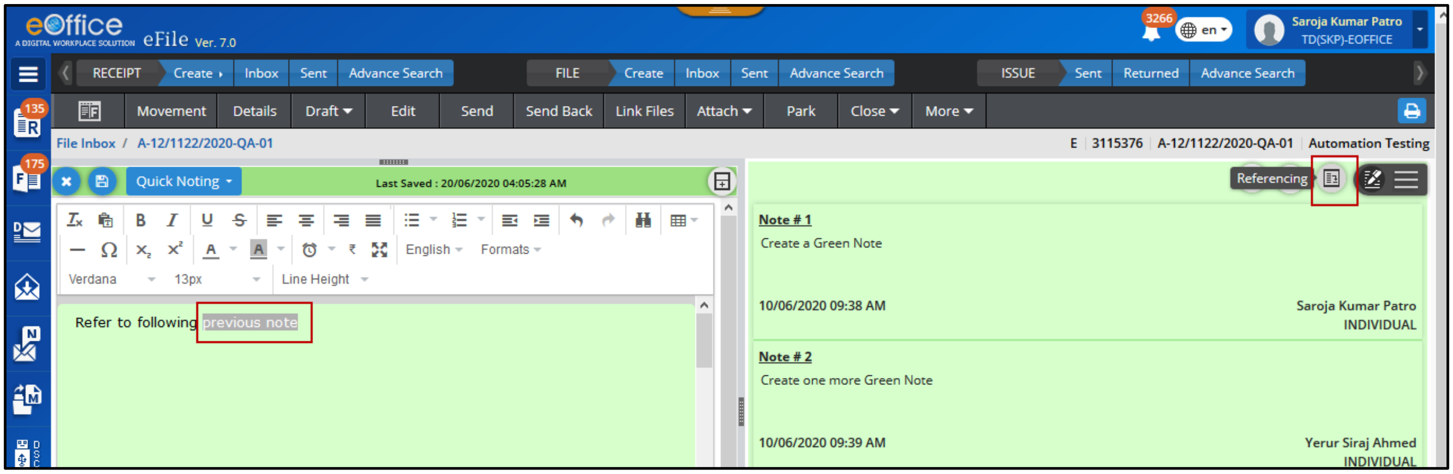


Figure 215

3. Select **Note No**. and subsequent **Paragraph** using Drop down list.
4. Clicks **OK** to refer to specific Note or Paragraph of previous noting.

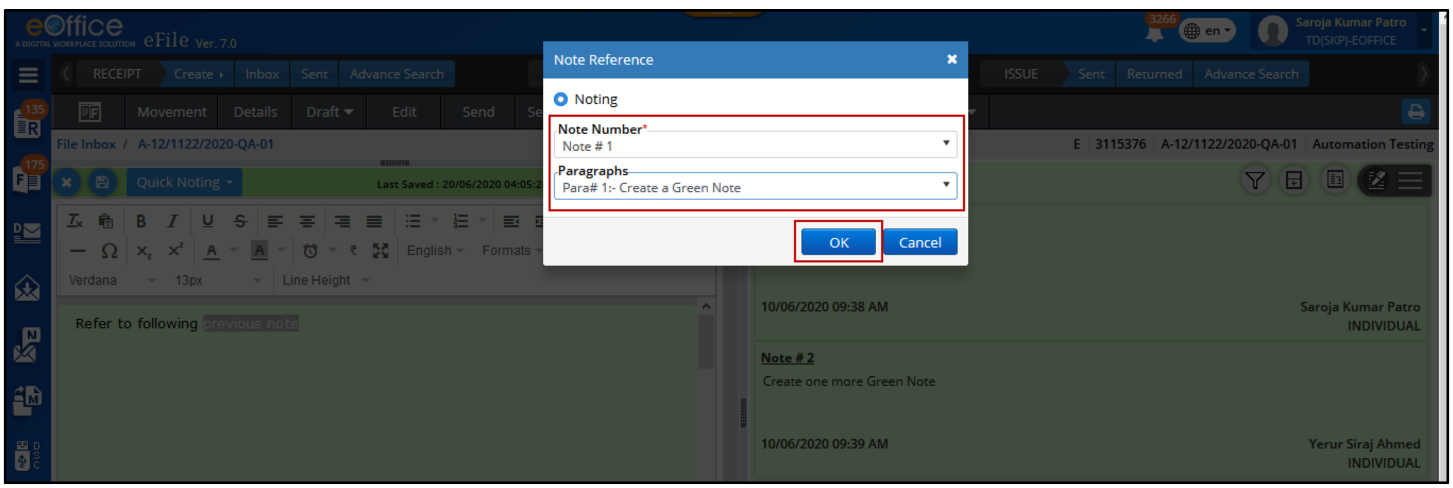


Figure 216

Note:

- **Referencing Icon** will be Active only on selection of text in Green/Yellow Note Editor and only if Correspondence or Previous Noting is available in File.
- **Refer this Page** context Menu will be available only on selection of text in Green/Yellow Note Editor and only if Correspondence or Previous Noting is available in File.
- **Referred content** will be displayed as Hyperlink (Underlined and in Blue Color), clicking on which will display the referred Noting/Paragraph in a popup window.

Edit File Details

This feature is required to edit metadata of File.

Important Points:

- ✓ File metadata (Except File No., Nature and Type) can be Edited/Updated only be the users of dealing section.
- ✓ Only Files available in File Inbox/Inbox Folder/Created/Parked list can be edited.
- ✓ Physical files in Inbox that need be edited must be in received state.
- ✓ Only users of the dealing section will be privileged to edit the file.

STEPS TO FOLLOW:

1. Open a file from **Inbox/ Inbox Folder/ Parked/ Created** list and click **Edit** menu to edit the meta-data (**Figure 217**).

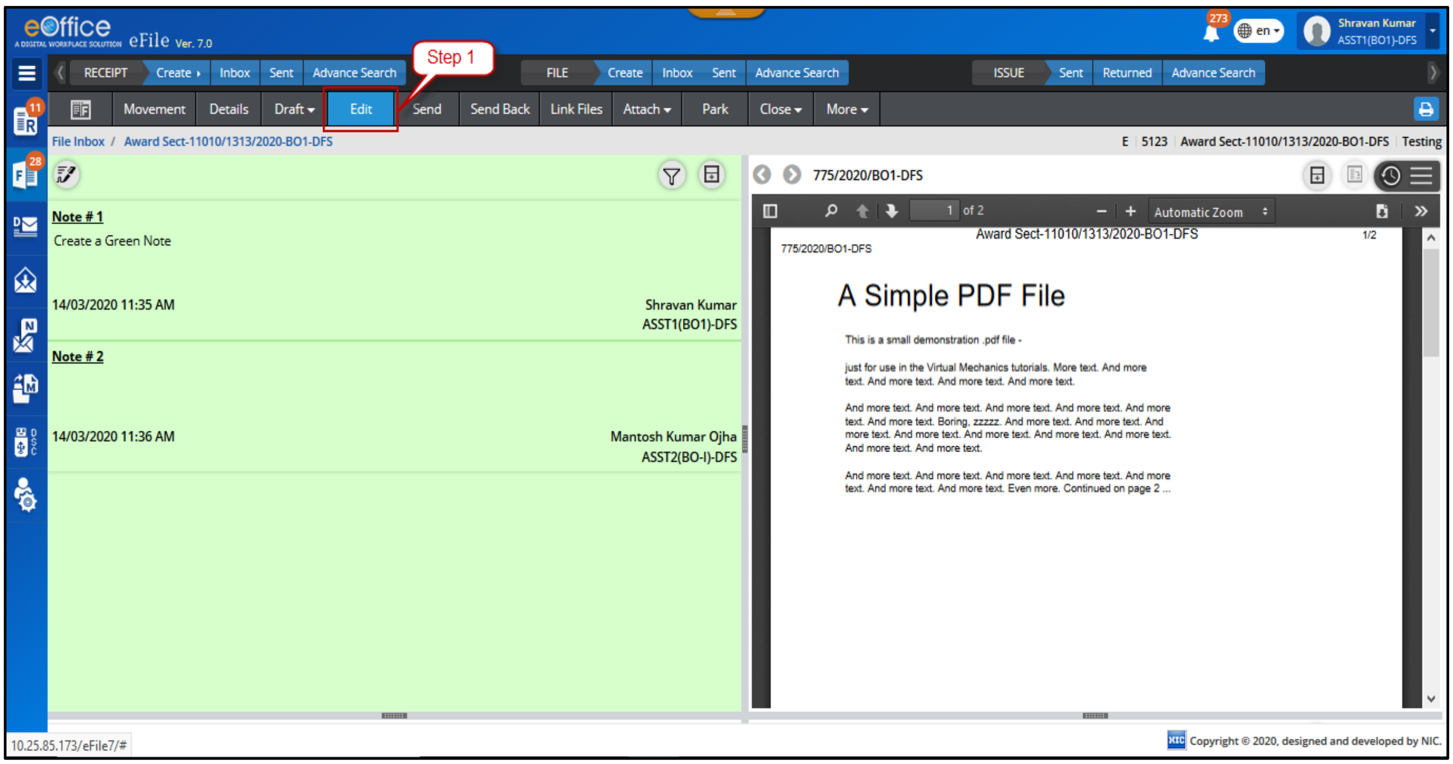


Figure 217

2. Make the necessary changes in Subject Description, Main Category, Sub-Category, Remarks, Language, Previous and Future Reference values. (Figure 218)
3. Click **Save** button to save the changes and complete the editing of file.

Figure 218

Note:

- User will be redirected to the file inner page after editing done.
- Edited/updated information will be displayed under File details.
- Only users of the dealing section will be privileged to edit the file.

File Attachments

This feature is required to attach Files/Receipts in a main file. Attached Files/Receipt will move along with main file and there is provision to 'Detach' or 'Attach with Another File' attached File/Receipts at any point of time by providing mandatory remarks.

Attaching Files with main file

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder/Created/Parked List.
- ✓ File(s) to be attached must be present in Inbox/Inbox Folder/ Created list in standalone condition (Not attached with any other File).
- ✓ File in Parked/Closed/Submitted files for Closing or Reopening Approval/Approval request of file module will not be available for attachment
- ✓ Physical Files (Both main file and file to be attached) should be Received State in Inbox/Inbox Folder.
- ✓ File(s) to be attached must not have attached File/Receipt.
- ✓ File(s) to be attached must be of same nature (P/E) as of main File.

STEPS TO FOLLOW:

1. Click **Attach File** submenu under **Attach** menu in File Inner page to open file attachment page.

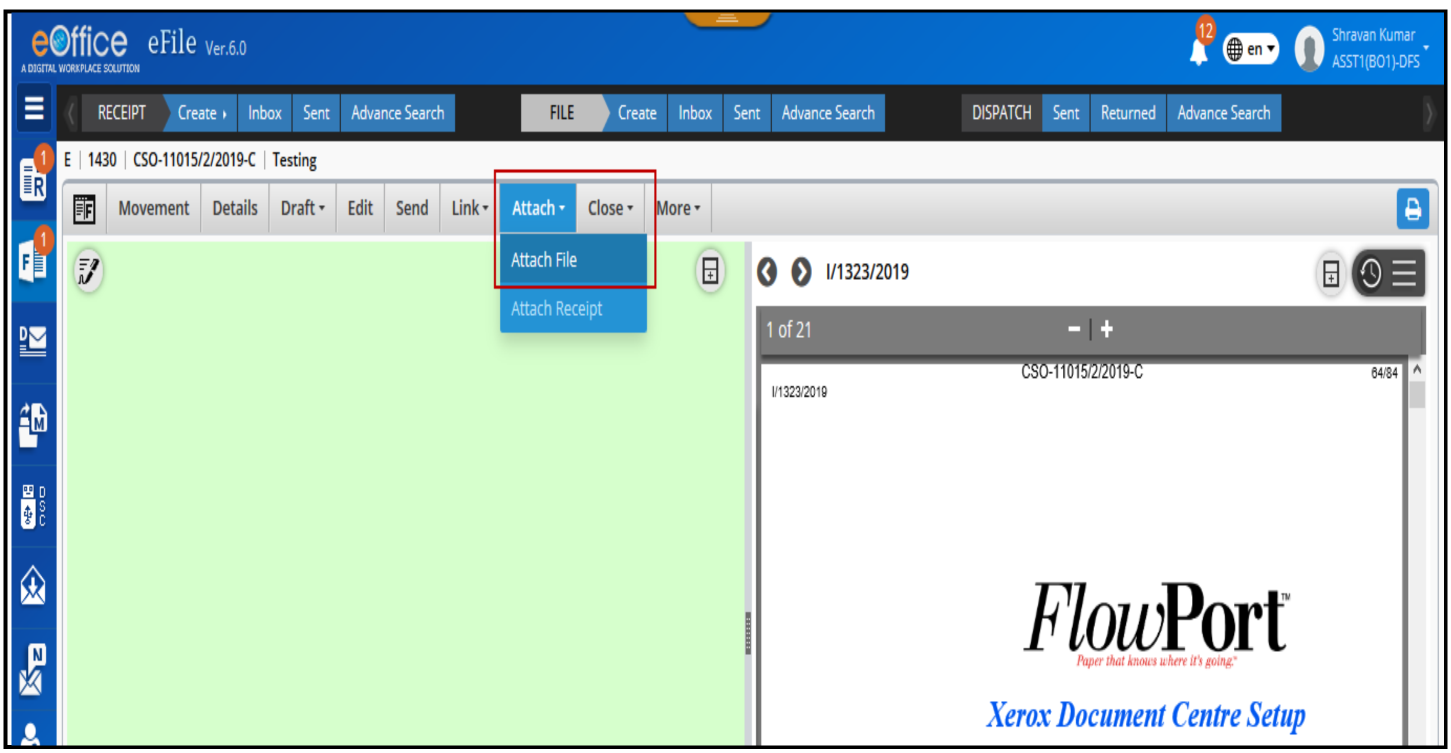


Figure 219

2. Click **Attach File** action Button.

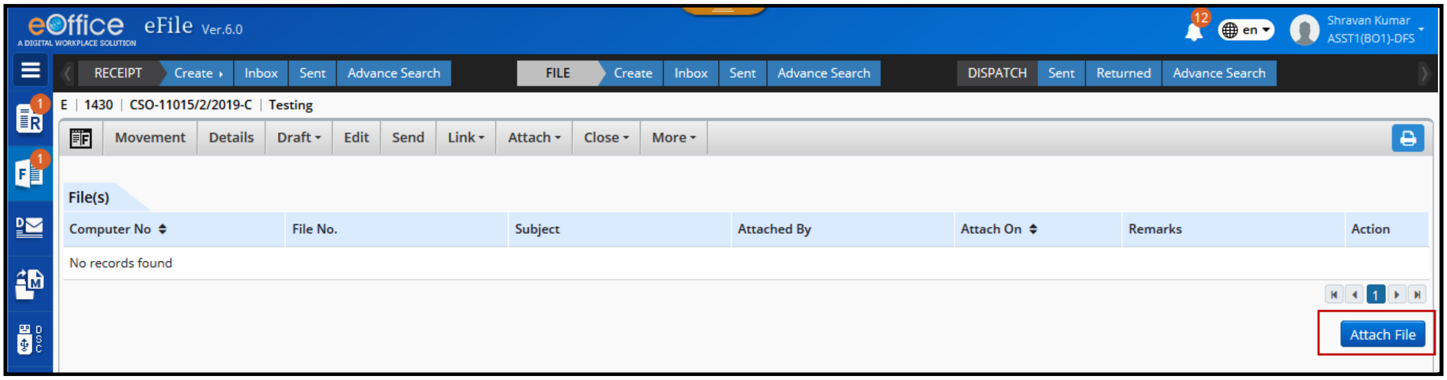


Figure 220

3. Select File(s) in Attach File pop up window showing year wise listing of File(s) (Inbox/Inbox Folder/Created) of same nature as of main file.

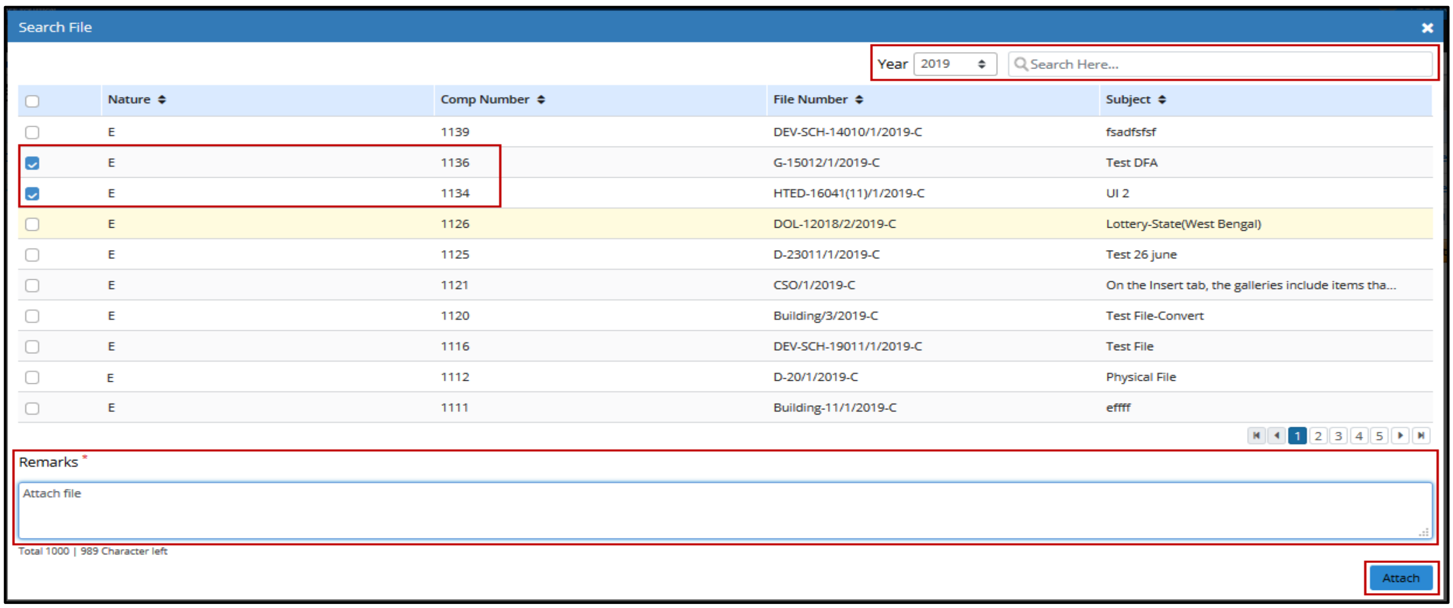


Figure 221

4. Enter mandatory **Remarks**.

5. Click **Attach** action button to attach selected File.

Note:

- Attached File(s) will be removed from its current location.
- Location of Attached File will be updated in the Advance Search of the Attached file.
- Attachment details will be maintained in the Attach File Page of the Main file and Attached/Detached Tab of File history in File Details page.
- Attachment details will also be displayed in Details of main File searched from Advance Search.
- File movement history of attached file should be updated with attachment information in Remark with every movement of main file (until detached).
- Option to **Detach**, **Attach with Another** and view Action Details of attached file should be displayed in File Attachment page.
- Attachment icon should be displayed, next to File no. in Inbox/Inbox Folders/Created/Parked list page.

Attaching Receipt with Main File

Important Points:

- ✓ Main File must be present in Inbox/Inbox Folder/Created/Parked List of the user.
- ✓ Receipt(s) to be attach must be present in Inbox/Inbox Folder/Created List in standalone condition (Not attached with any other Receipt).
- ✓ Note: Receipt in Closed folder will not be available for attachment.
- ✓ Main Physical file should be in received state.
- ✓ Physical Receipt to be attached should be in received state.
- ✓ Receipt(s) to be attached must not have any attached File/Receipt.
- ✓ Receipt(s) to be attached must be of same nature (P/E) as of main File.

STEPS TO FOLLOW:

1. Click **Attach Receipt** submenu under **Attach** menu in File Inner page to open file attachment page.

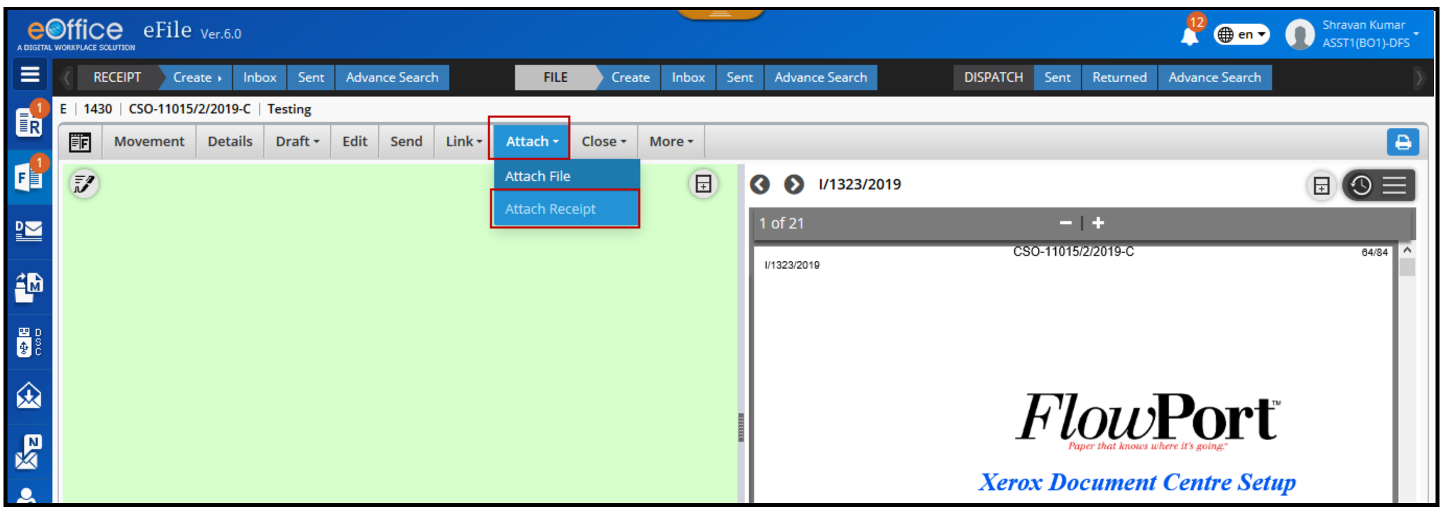


Figure 222

2. Click **Attach Receipt** action button.

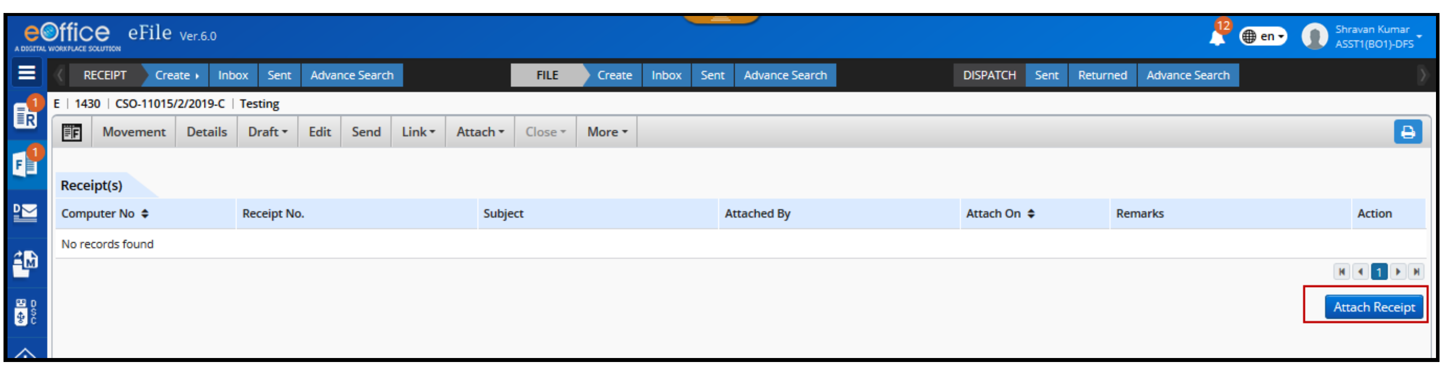


Figure 223

3. Select Receipt(s) from the pop up window showing year wise listing of Receipt(s) (Inbox/Inbox Folder/Created) of same nature as of main file.

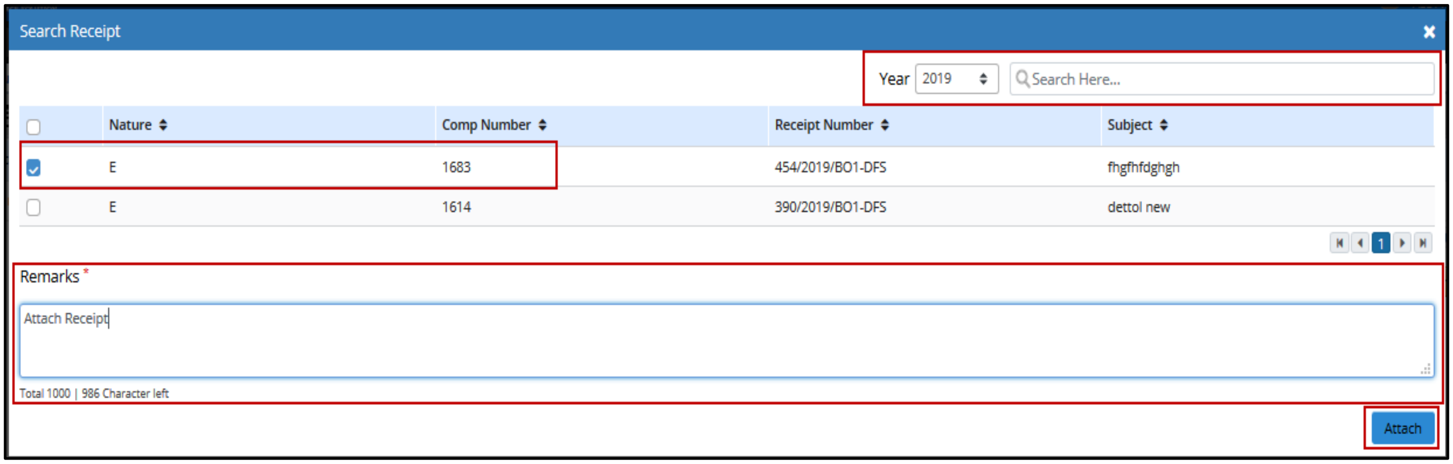


Figure 224

4. Enter Remarks and click **Attach** to attach selected File.

Note:

- Attached Receipt(s) will be removed from its current location.
- Location of Attached Receipt will be updated in the Advance Search of the Attached Receipt.
- Attachment details will be maintained in the Attach Receipt Page of the Main file and Attached/Detached Tab of File history in File Details page.
- Attachment details will also be displayed in Details of main File searched from Advance Search.
- Receipt movement history of attached receipt will be updated with attachment information in Remark with every movement of main file (until detached).
- Option to **Detach**, **Attach with Another** and view Action Details of attached receipt will be displayed in file attachment page.
- Attachment icon will be displayed next to File no. in Inbox/Inbox Folders/Created/Parked list page.

Detach already attached Files

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder/Created/Parked List.
- ✓ Attached File(s) must be present in attached file list of main file.
- ✓ Main physical file should be received state in Inbox/Inbox Folder.

STEPS TO FOLLOW:

1. Click **Attach File** submenu under **Attach** menu in File Inner page to open File attachment page.

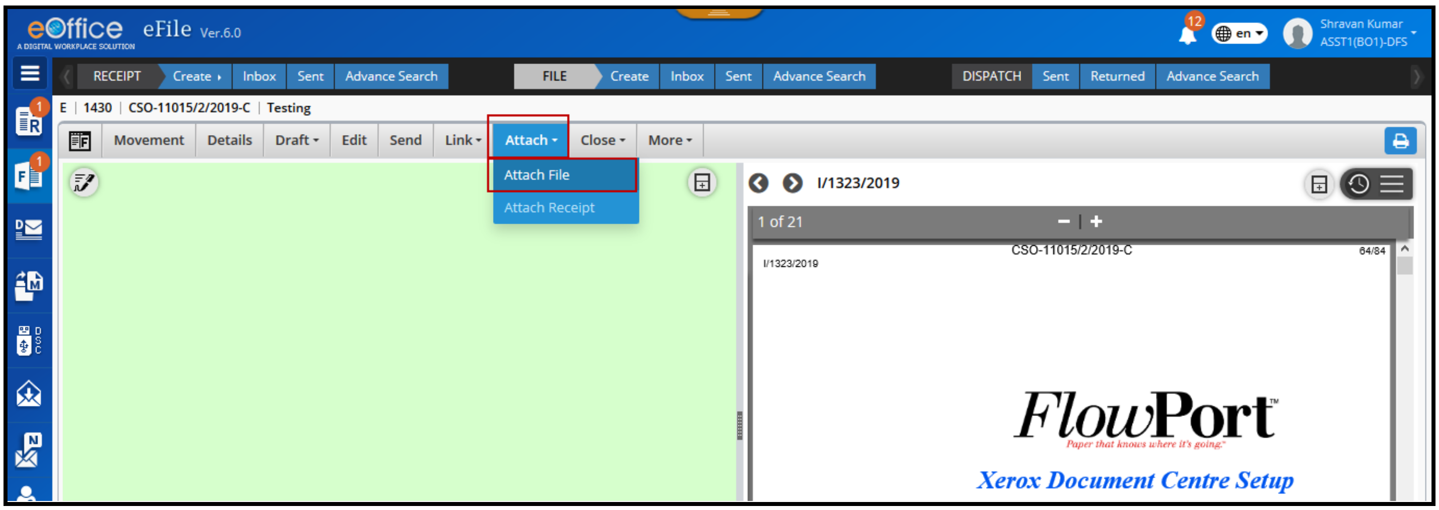


Figure 225

2. Select File(s) and click **Detach** action dropdown menu or **Detach Icon** adjacent to attached File details.

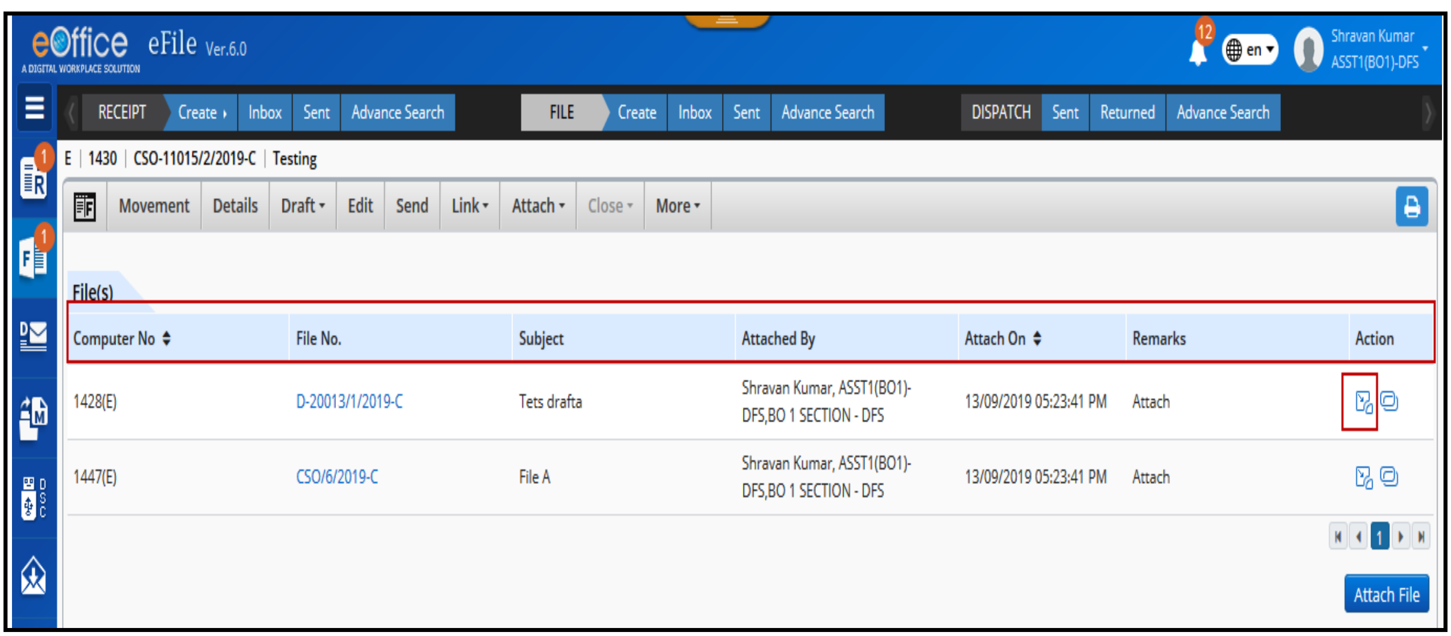


Figure 226

3. Enter **Remarks** in Confirmation alert popup.

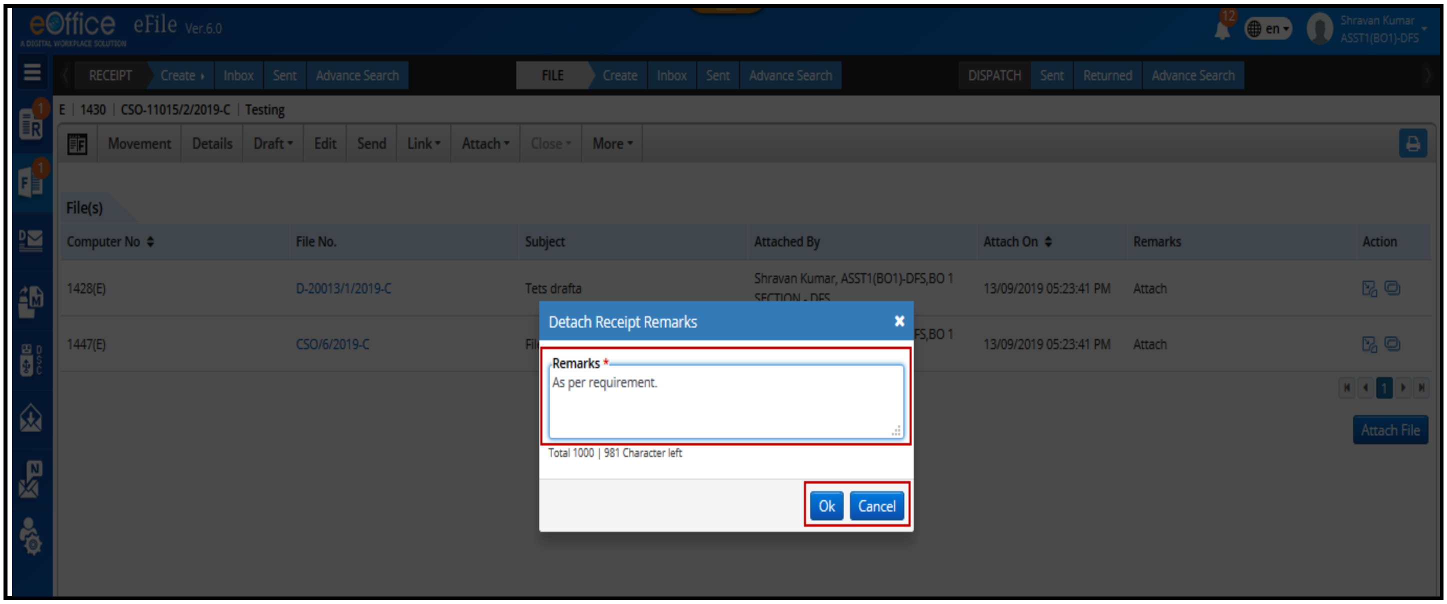


Figure 227

4. Click **Ok** button to detach selected file.

Note:

- Selected attached File(s) will be detached from main File.
- Detached File(s) will be moved to File Inbox when detached after movement of main file.
- Detached File(s) should move to respective folder (from where they get attached) when detached without movement of main file.
- File(s) detach details should be maintained under Attached/Detached tab of File History in File Detail Page.
- Attach/Detach history should not be maintained if attached File get detached without any movement of File.
- File movement history of detached file should be updated with detachment information in Remark, if detached after movement of main file.

Detach already attached Receipts

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder/Created/Parked List.
- ✓ Attached File(s) must be present in attached Receipt list of main file.
- ✓ Main physical file should be received state in Inbox/Inbox Folder.

STEPS TO FOLLOW:

1. Click **Attach File** submenu under **Attach** menu in File Inner page to open File attachment page.

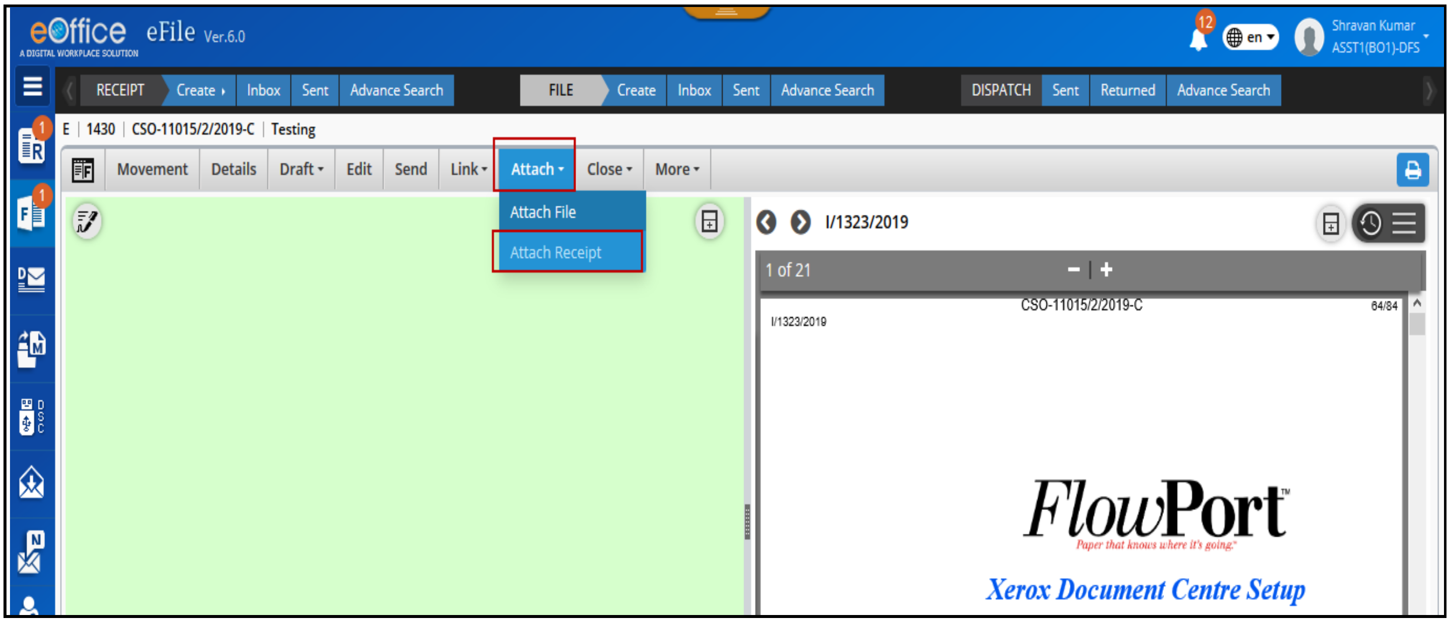


Figure 228

2. Select Receipts and click **Detach** action dropdown menu or **Detach Icon** adjacent to attached Receipts details.

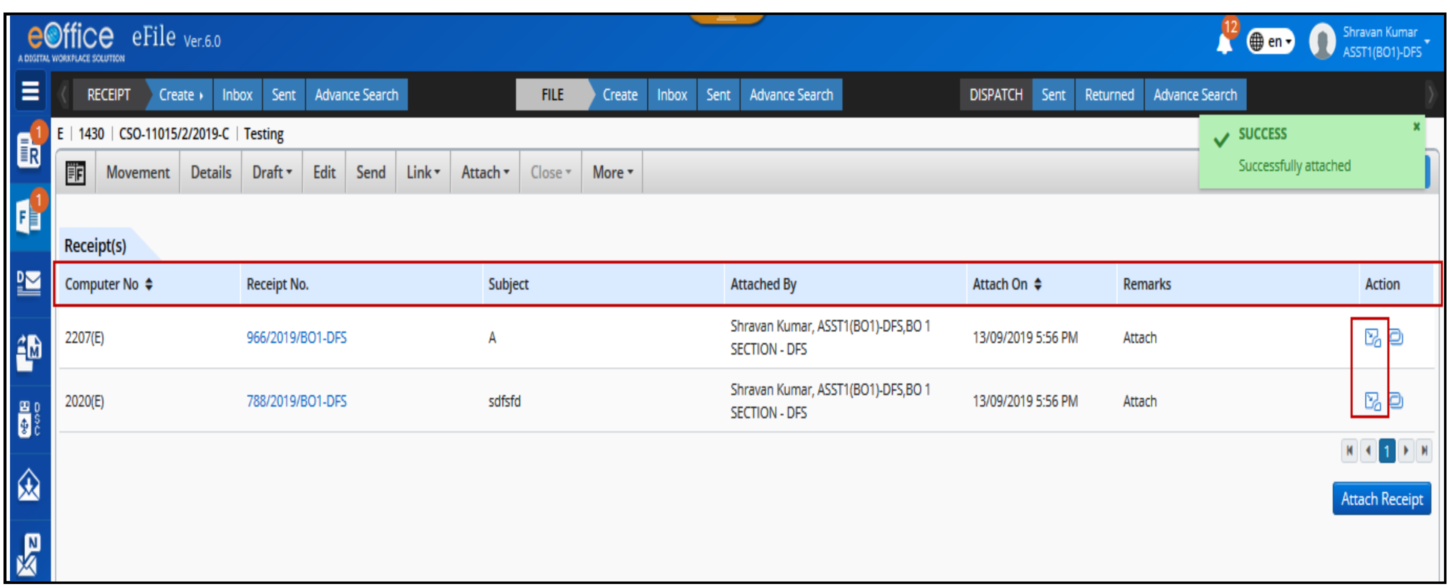


Figure 229

3. Enter **Remarks** in Confirmation alert popup.

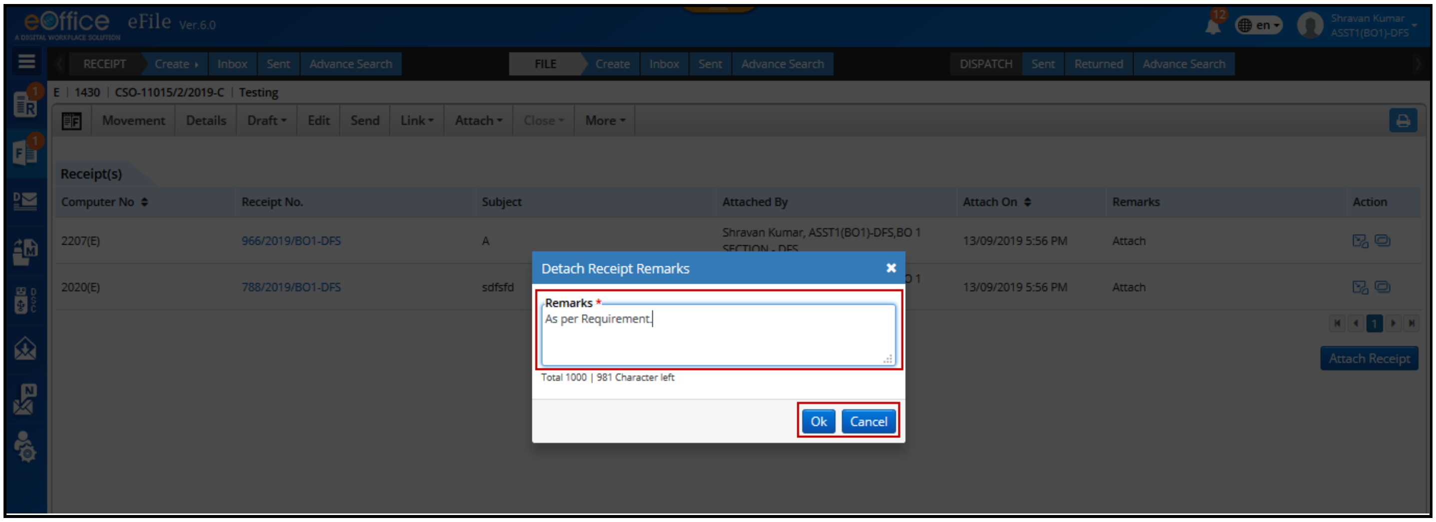


Figure 230

4. Click **Ok** button to detach selected receipts.

Note:

- Selected Receipts will be detached from main File.
- Detached Receipts will move to Receipt Inbox of user if detached after movement of main file.
- Detached Receipts will move to respective folder (from where they get attached) if detached without movement of main file.
- Receipts detach details will be maintained in Attached/Detached tab of File History in File Detail Page.
- Attach/Detach history will not be maintained if attached File(s)/Receipt(s) get detached without any movement of File
- Receipt movement history of detached Receipt will be updated with detachment information in Remark, if detached after movement of main file.

Attach with another File

This feature is required to attach already attached File/Receipt with another file available in user's File Inbox/Inbox Folder/Created List.

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder/Created/Parked List.
- ✓ Attached Files/Receipts must be present in attached File/Receipt list of main file.
- ✓ Main physical file should be received state in Inbox/Inbox Folder.

STEPS TO FOLLOW:

1. Click **Attach File** submenu under **Attach** menu in File Inner page to open File attachment page.
2. Select File/Receipts and click **Attach with Another** icon adjacent to attached File/Receipts details list. (Pop up displaying year wise list of Files in Inbox/Inbox/Folder/Created/Parked will open)

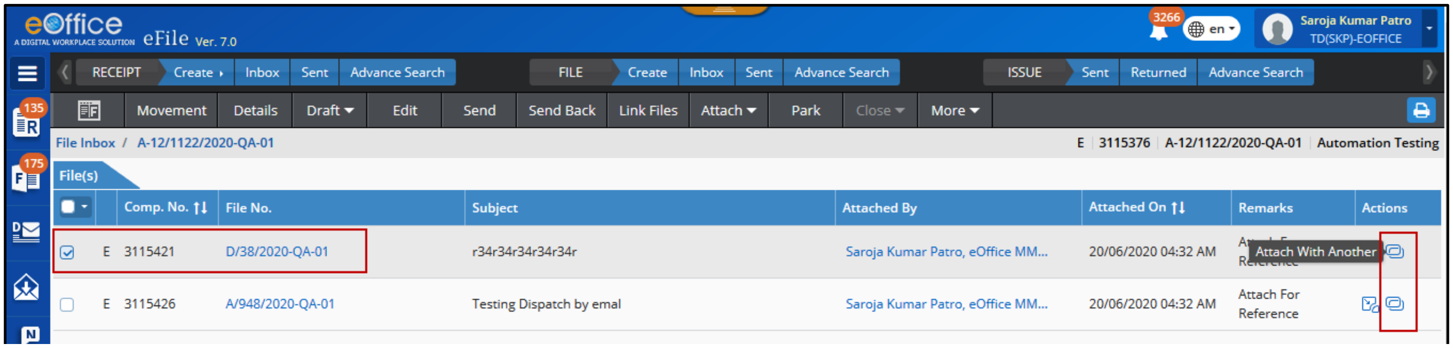


Figure 231

3. Select the **File** with which you want to attach.
4. Enter mandatory **Remarks** in popup.
5. Click **Attach** button to attach respective File/Receipt with other selected file.

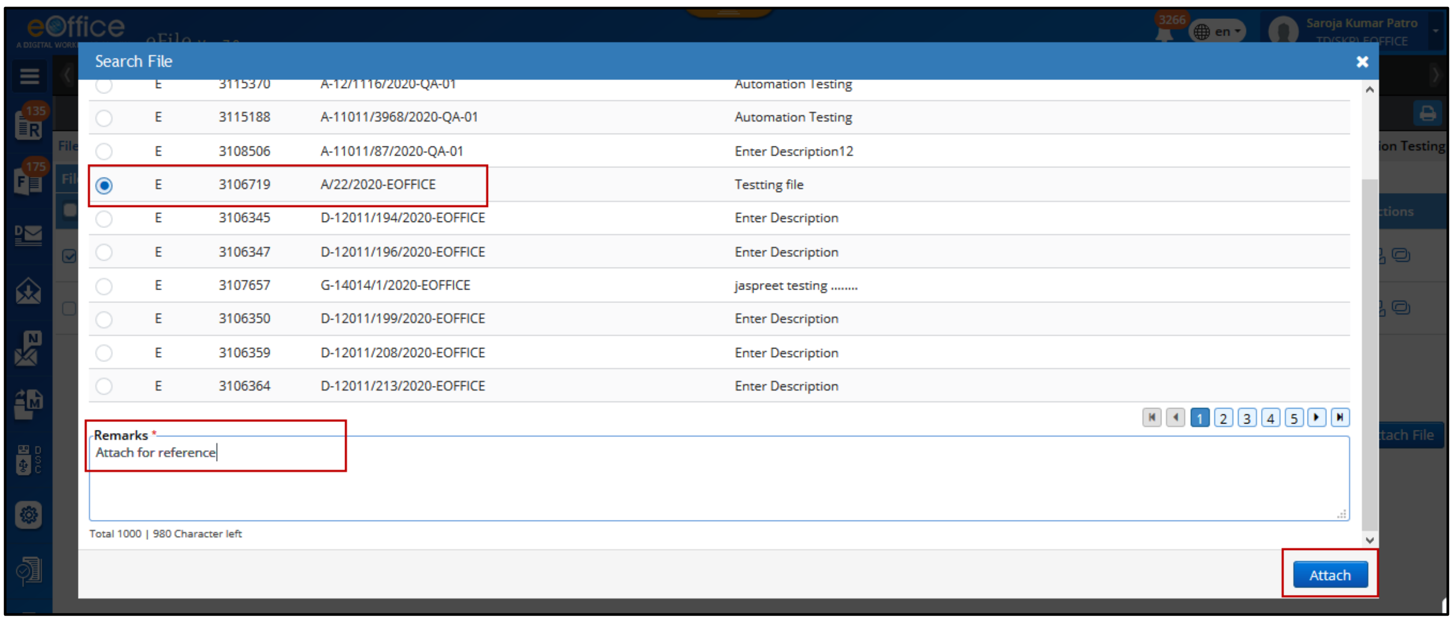


Figure 232

Note:

- Selected File/Receipt will be detached from main File and attached to selected File.
- File/Receipt details will be maintained in Attached/Detached tab of File History in File Detail Page.
- Attach/Detach history will not be maintained if attached File/Receipt get attached with another file without any movement of File
- File/Receipt movement history will be updated.

Link File

This feature is required to Link Copy of a file in main file. Option to **Delink** and View files in which copy of opened file is linked (**Referred in File**) are available.

Link Files with Main File

Important Points:

- ✓ Main File in which other file is to be linked must be in Inbox/Inbox Folders/Parked/Created Folder.
- ✓ Files to be linked must be present in Inbox/Inbox Folders/Created Folder of the user.
- ✓ Files to be linked and main file must not be attached to other File/Receipt.
- ✓ Physical files to be linked must be in received state.
- ✓ Main file and file to be linked must not be same.

STEPS TO FOLLOW:

1. Click Link menu in File Inner Page to open the linked file list page.
2. Click '**Link**' button.

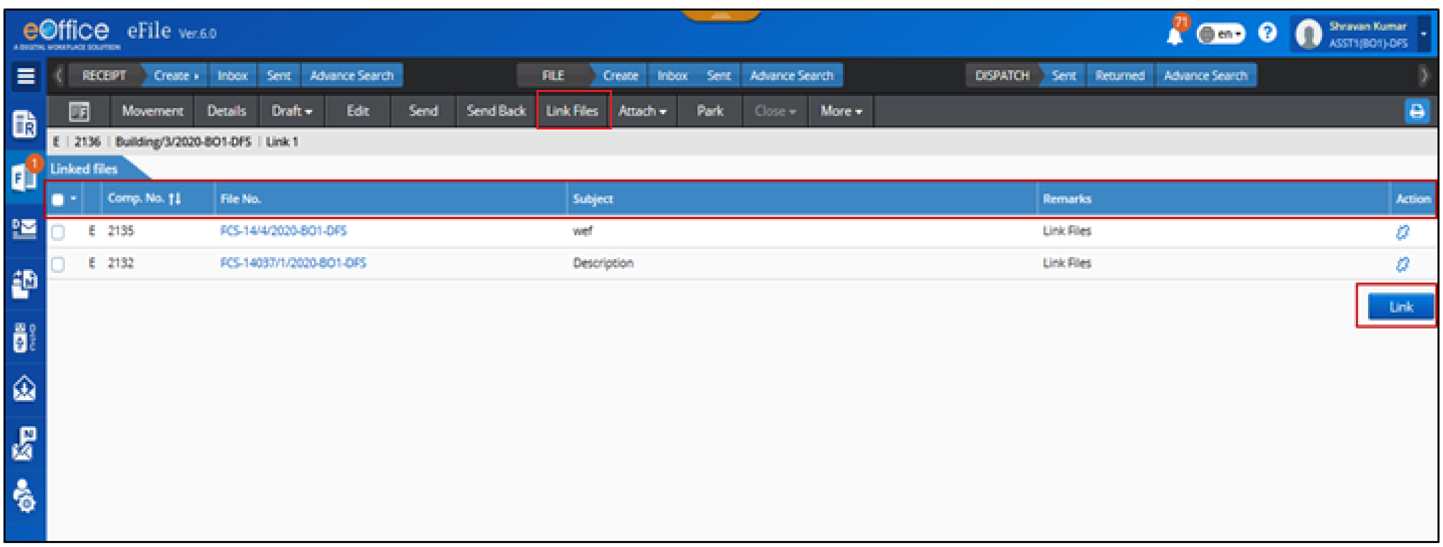


Figure 233

3. Select Files using check box window in the 'Search Files to Link' pop up showing year wise listing of Files (Inbox/Inbox Folder and Created).

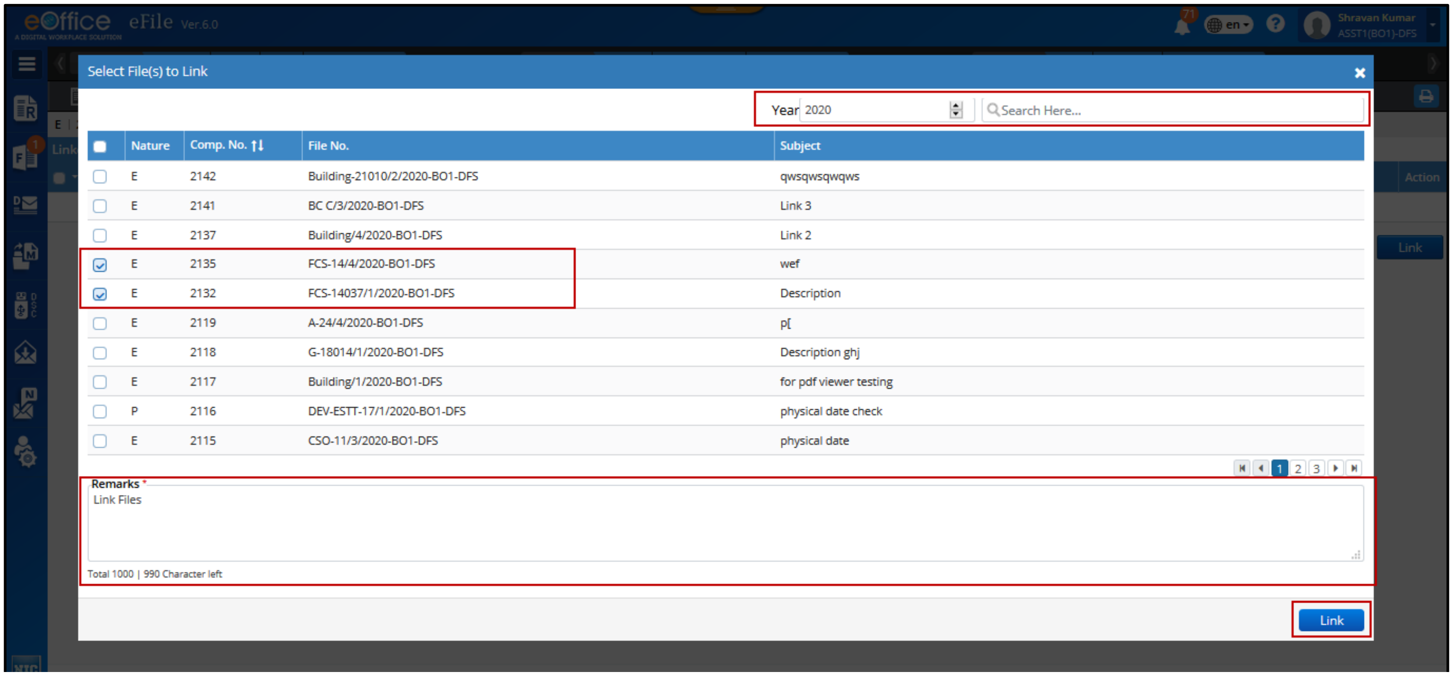


Figure 234

4. Enter mandatory remarks.
5. Click **Link** button in Pop up to link the selected files with main file.

Note:

- Read-only Copy of Files will be Link with the main File.
- Linking details will be maintained in the Linked File Page of the Main file and Link/Delink Tab of File history in File Details page.
- Details of main file will be maintained in the Referred in File list of the linked file.
- Files that are linked will remain in their respective locations.
- Files that are already linked in a main file will not be displayed again in 'Search Files to Link' pop.

Delink Linked Files

Important Points:

- ✓ Main File in which other file is to be delinked must be in Inbox/Inbox Folders/Parked/Created Folder.
- ✓ Main file from which other file is to be delinked must not be attached to other Files/Receipt.
- ✓ Linked File(s) must be available in Linked files list page.
- ✓ User who will delink the linked files must be the same user who had linked the file or other users within his/her dealing section.

STEPS TO FOLLOW:

1. Click **Link** menu in File Inner Page to open the linked file list page.

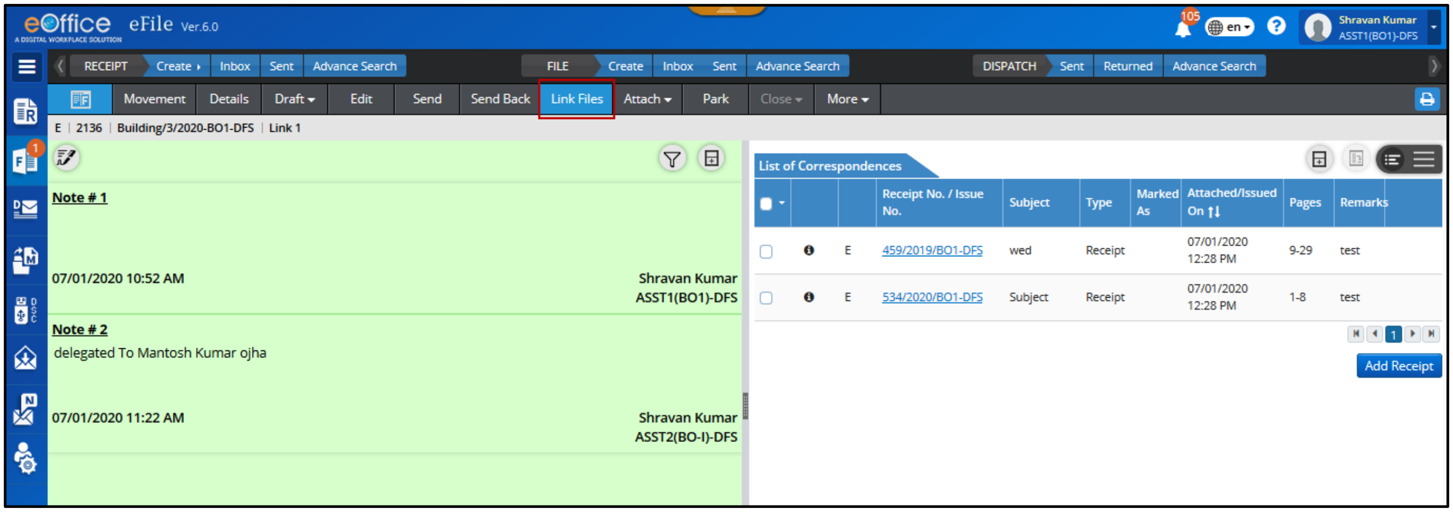


Figure 235

2. Select File(s) and click **Delink** menu or Delink icon for respective file.

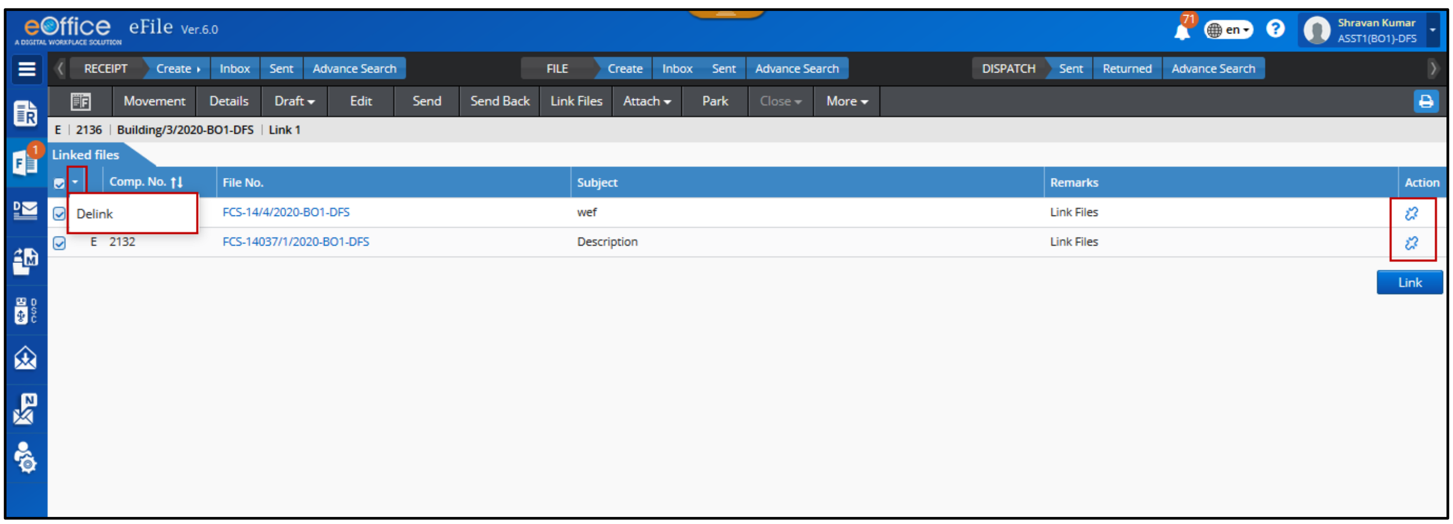


Figure 236

3. Enter Mandatory **Remarks**.

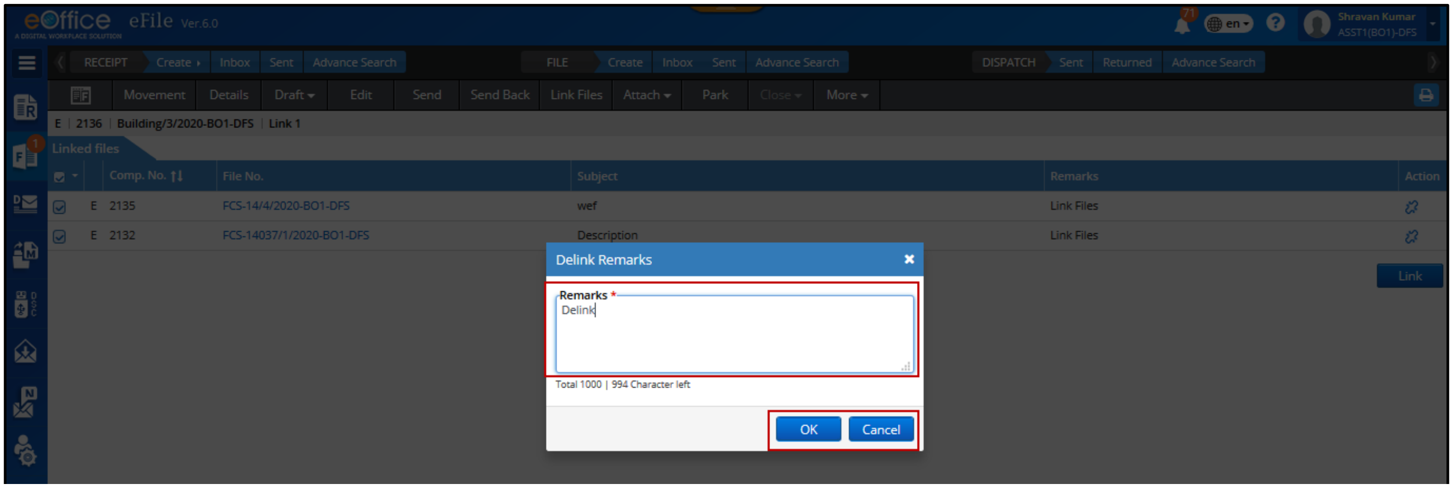


Figure 237

4. Click **OK** in Confirmation Pop up to delink.

Note:

- Linked File(s) will be removed from Linked File List page of File.
- File(s) delink details will be maintained under Link/Delink tab of File History in File Detail Page.
- Link/Delink history will not be maintained if Linked File(s) get delinked without any movement of File.
- Linking details for the delinked File should not be removed from Referred in File list of delinked files
- Link/Delink history in Referred in File list page should not be maintained if Linked File get delinked without any movement of main File.

Referred in Files

Important Points:

- ✓ Referred in File is list of files in which copy of opened file is linked
- ✓ File must have been linked at least once with Main File(s) after its creation.
- ✓ Link/Delink history in Referred in File list page should not be maintained if Linked File get delinked without any movement of main File.

STEPS TO FOLLOW:

1. Click open a File to view file inner page.

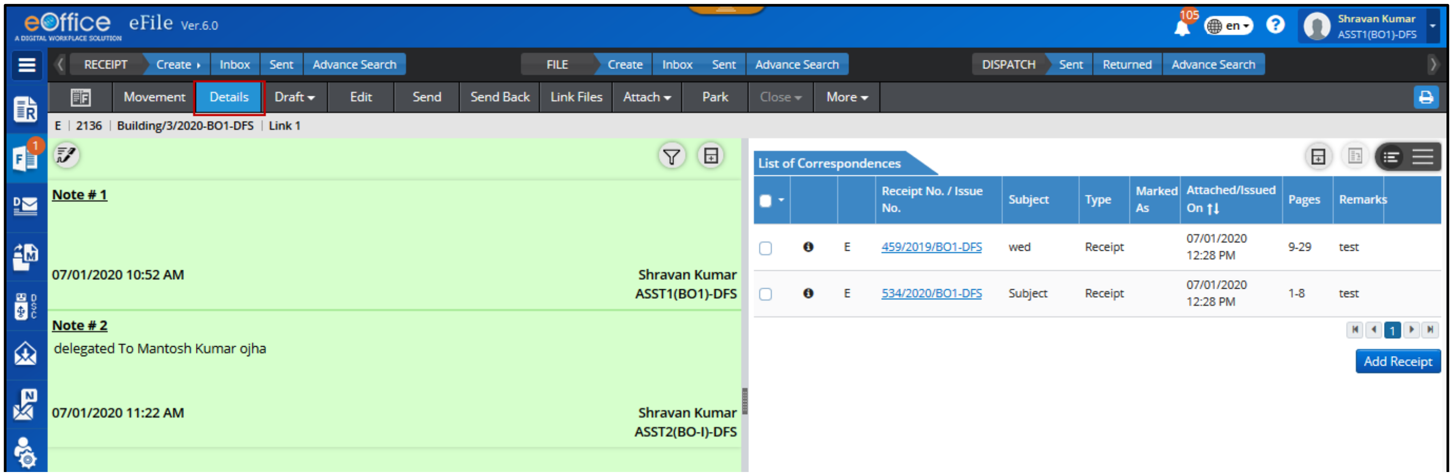


Figure 238

2. Click **Referred** Tab of File history in File Details page.

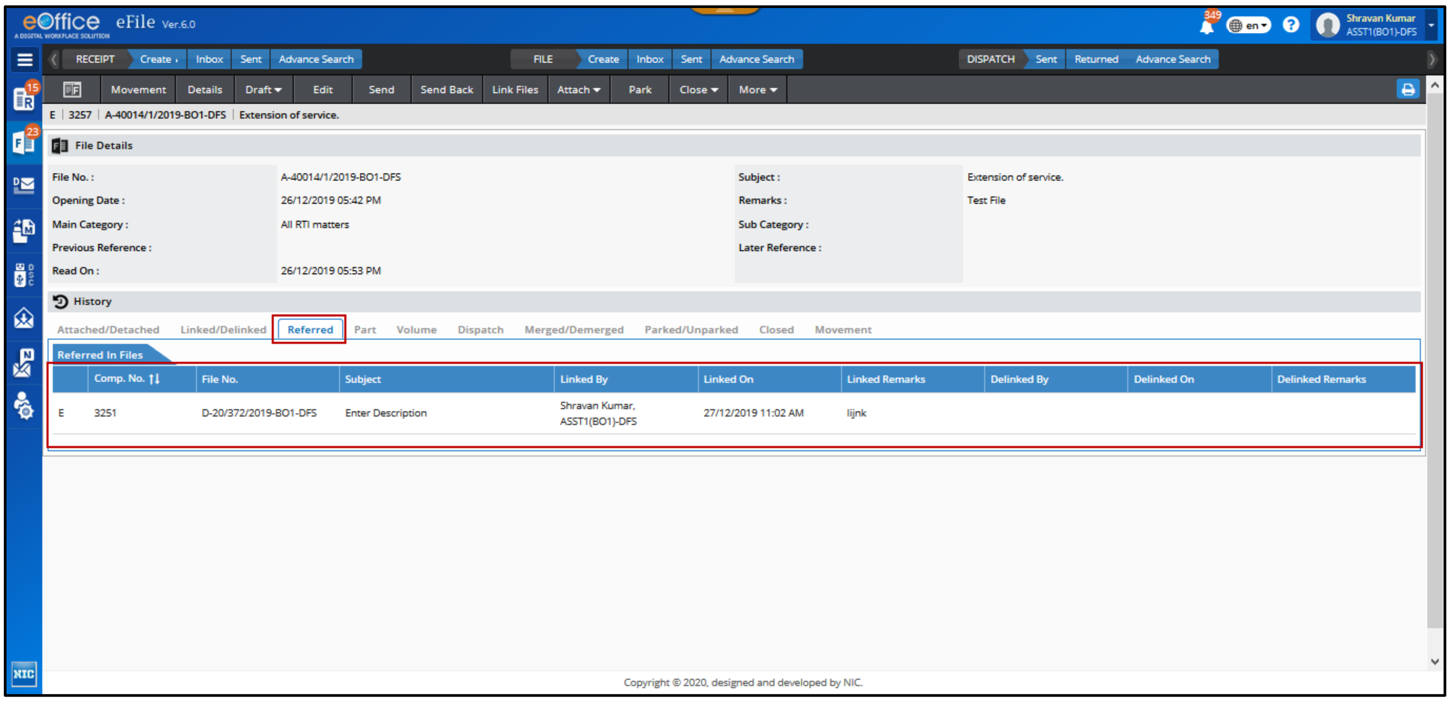


Figure 239

Upload Local Reference

This feature is required to upload local Document for reference purpose.

Important Points:

- ✓ Document to be uploaded must be in only [PDF, DOC, DOCX, XLS, XLSX, ODT, OPENDOC, PPT, PPTX, and PPSX] file formats.

STEPS TO FOLLOW:

1. Click open a File to view file inner page from Inbox/Inbox Folder/Created/Parked List.
2. Click **References** menu under **Action Dropdown menu** in Right panel of File inner Page to open References page.

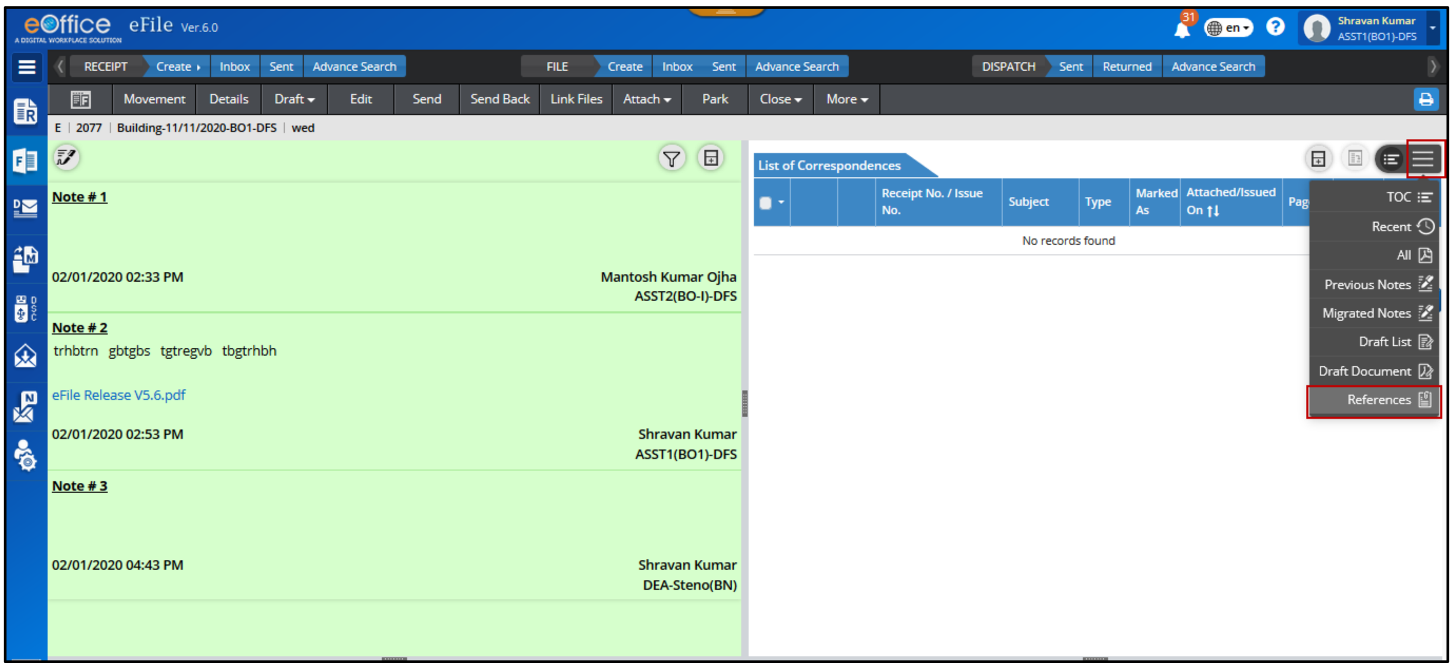


Figure 240

3. Click **Attach References** action button.

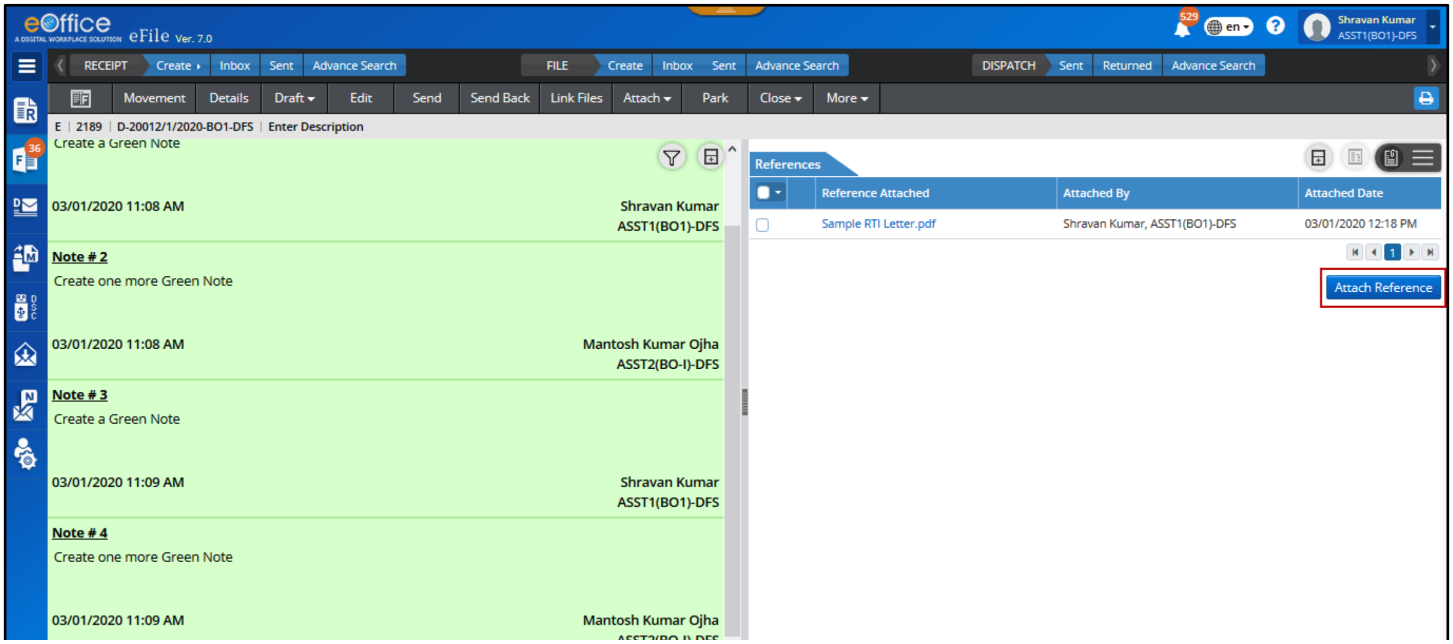


Figure 241

4. Select document from the pop up window showing Documents saved in System's local drive.
5. Click **Open** button or **Double Click** document to attach.

Merge Physical Files

This feature is required to merge two or more physical file into a main file. There will be option to **Demerge** or **Merge with Another** file at any point of time by the users of dealing section.

Merge Files

Important Points:

- ✓ Physical file must be present in Inbox (Received state)/Created folder of the user.
- ✓ Main File and File(s) to be merged must be of same dealing section (that of logged in user).
- ✓ File to be Merged must not have any Attached File(s)/Receipt(s) or Merged File(s).

STEPS TO FOLLOW:

1. Click open a physical file to view file inner page from Inbox/Inbox Folder/ Created.
2. Click **Merge File** submenu under **More→Merge** menu to open Merge File page.

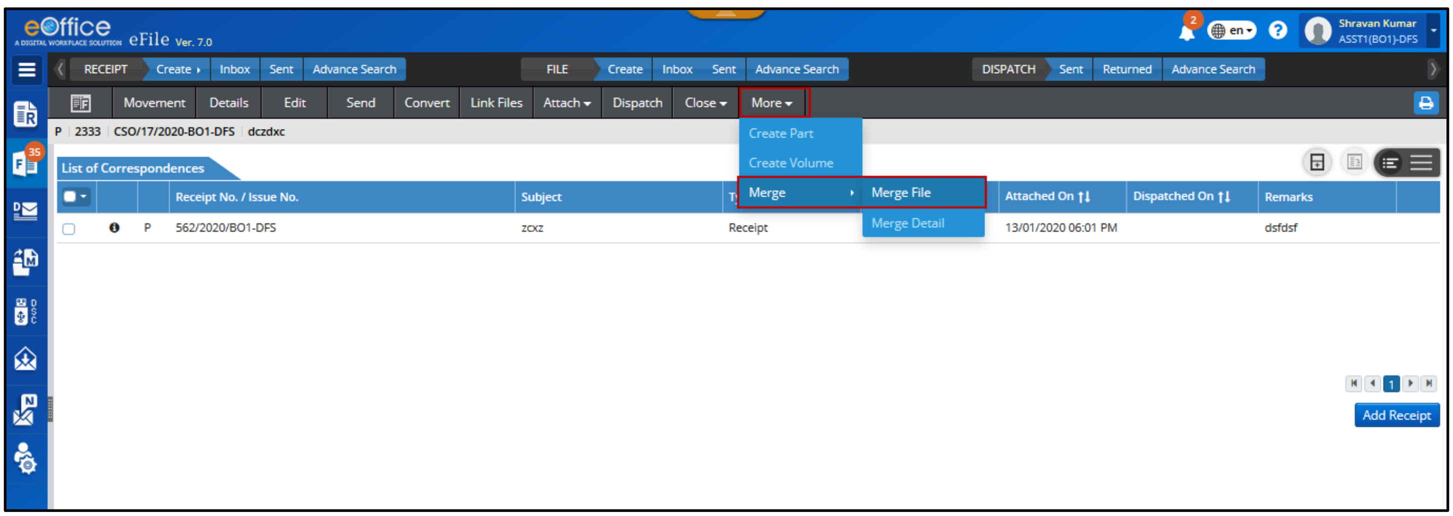


Figure 242

3. Select Files to merge from panel showing year wise searchable listing of Files (Inbox/Inbox Folder and Created).

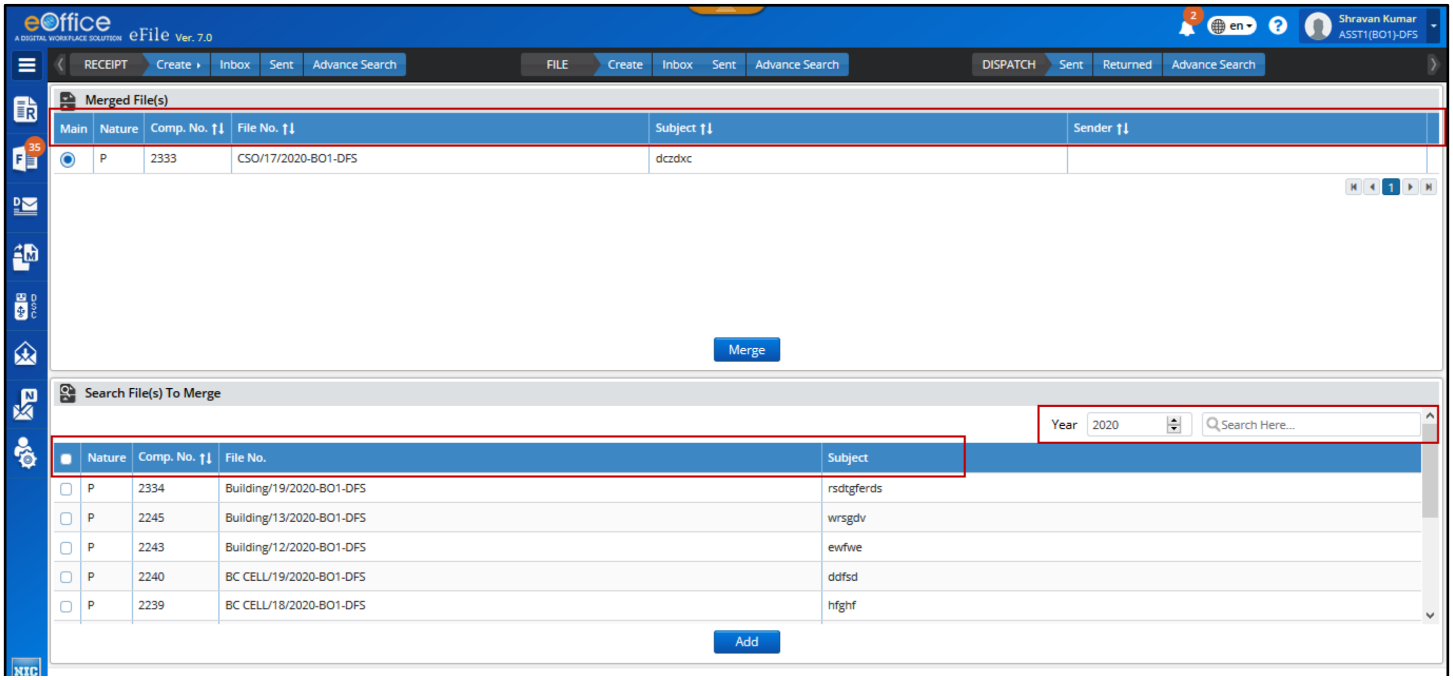


Figure 243

4. Click **ADD** to move selected files to Merge File panel.
5. Select Radio Button adjacent to added files to change the Main File. (By default opened file is selected as main File)

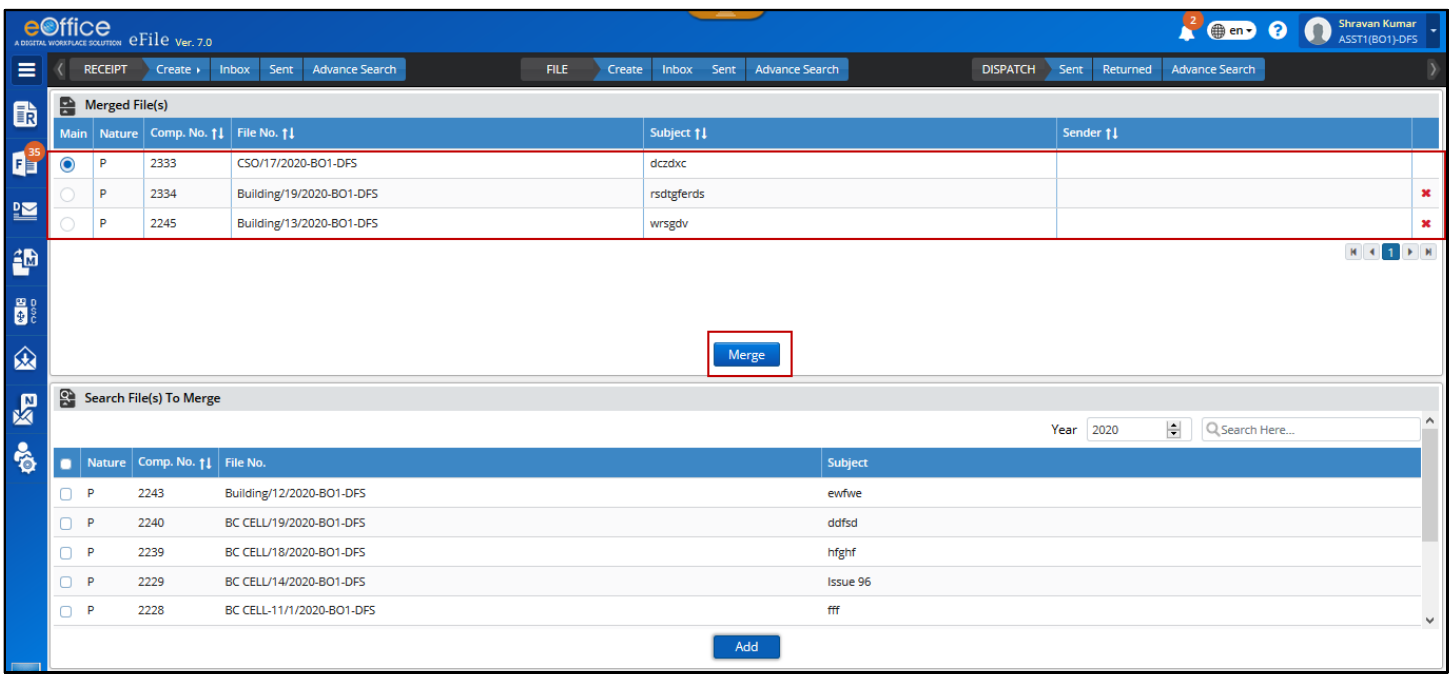


Figure 244

6. Click **Merge** Button.
7. Enter mandatory **Remarks** in Reason for Merging pop up.

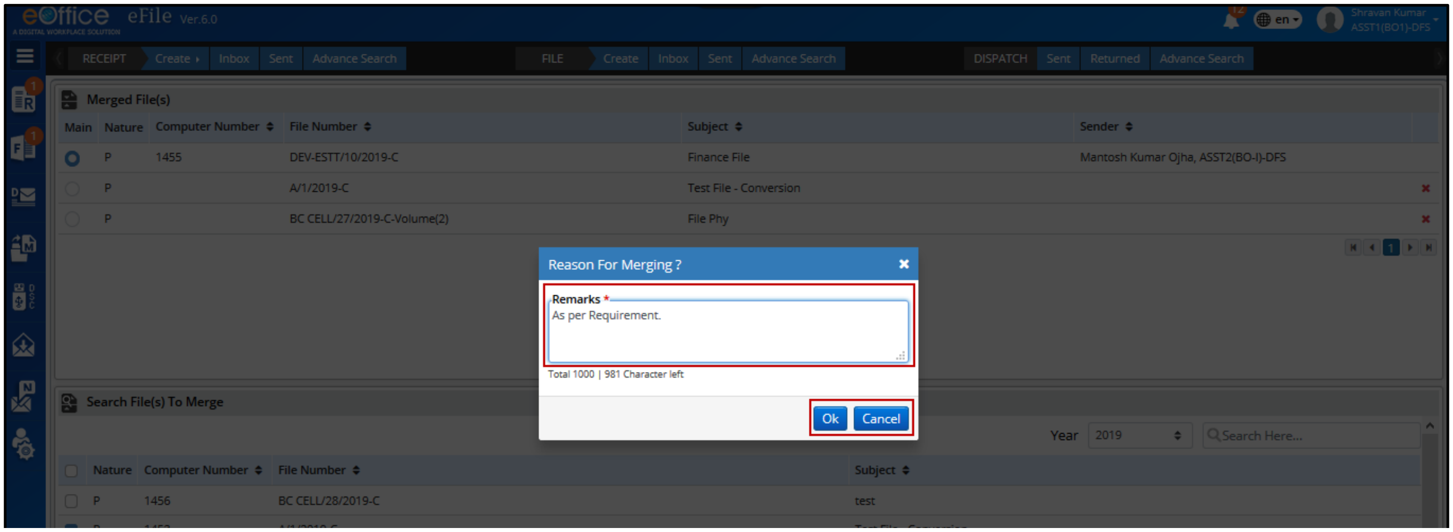


Figure 245

8. Click **OK** button.

Note:

- Selected Physical Files will be merged to Main physical file.
- Merged Files will be removed from their current location.
- Merge Files Detail will be maintained at Merge Details of Main File.
- User will have option to De-merge merged Files of same dealing section (that of logged in user).
- User will have option to Merge already merged file(s) with other File of same dealing section (that of logged in user).

Demerge already Merged Files

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder/Created list.
- ✓ Files must be present as Merged File in Merged Detail Page of a physical file.
- ✓ Users of only dealing section of main file can demerge the merged files.

STEPS TO FOLLOW:

1. Click open a physical file to view file inner page from Inbox/Inbox Folder/ Created.
2. Click **Merged Detail** submenu under **More→Merge** menu.

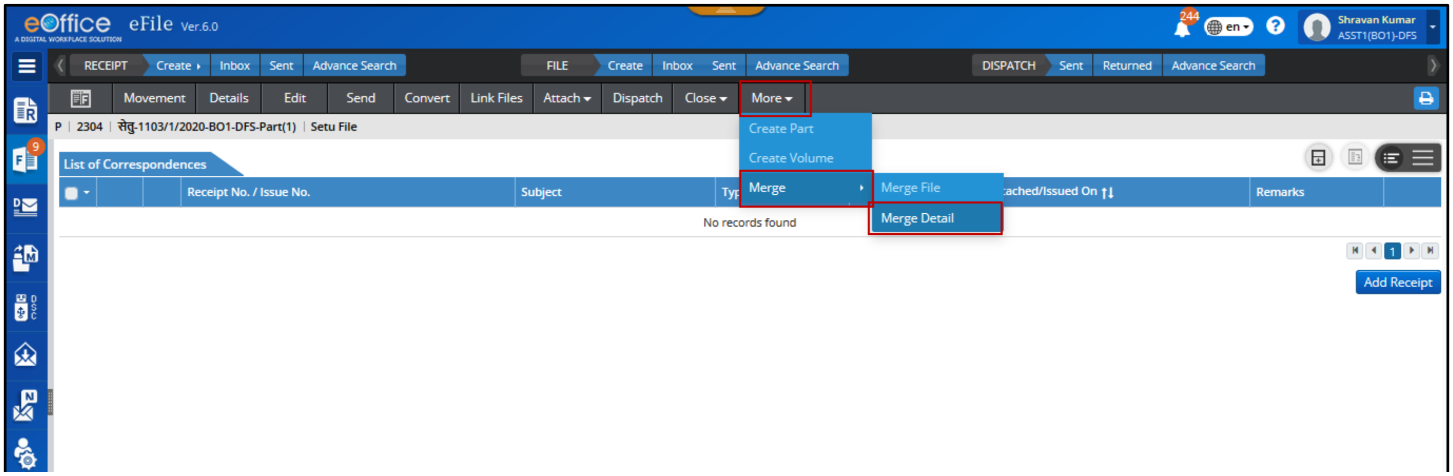


Figure 246

3. Select Files and click **Demerge**.

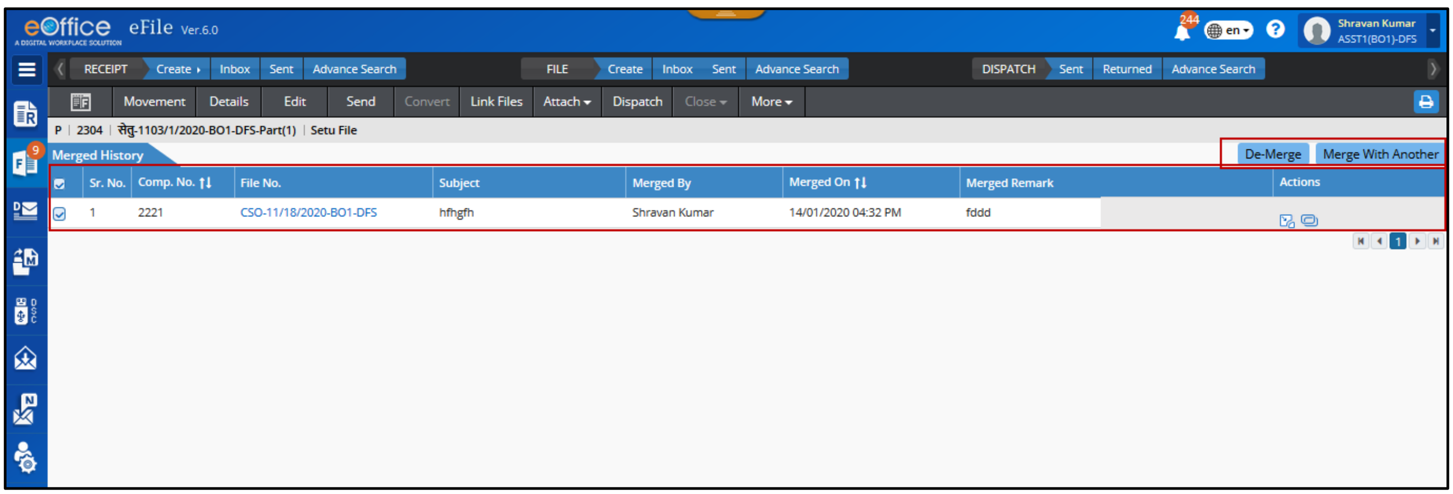


Figure 247

4. Enter mandatory **Remarks** in Confirmation pop up.
5. Click **OK** button.

Note:

- Demerge Files Detail will be maintained at Merged/Demerged tab in File history Details of Main File.

Merge with another File

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder/Created list.
- ✓ Files must be present as Merged File in Merged Detail Page of a physical file.
- ✓ File(s) to be merge with another file and Main file should be of same dealing section (that of logged in user).

STEPS TO FOLLOW:

1. Click open a physical file to view file inner page from Inbox/Inbox Folder/ Created.
2. Click **Merged Detail** submenu under **More→Merge** menu.
3. Select Files and Click **Merge with Another**.

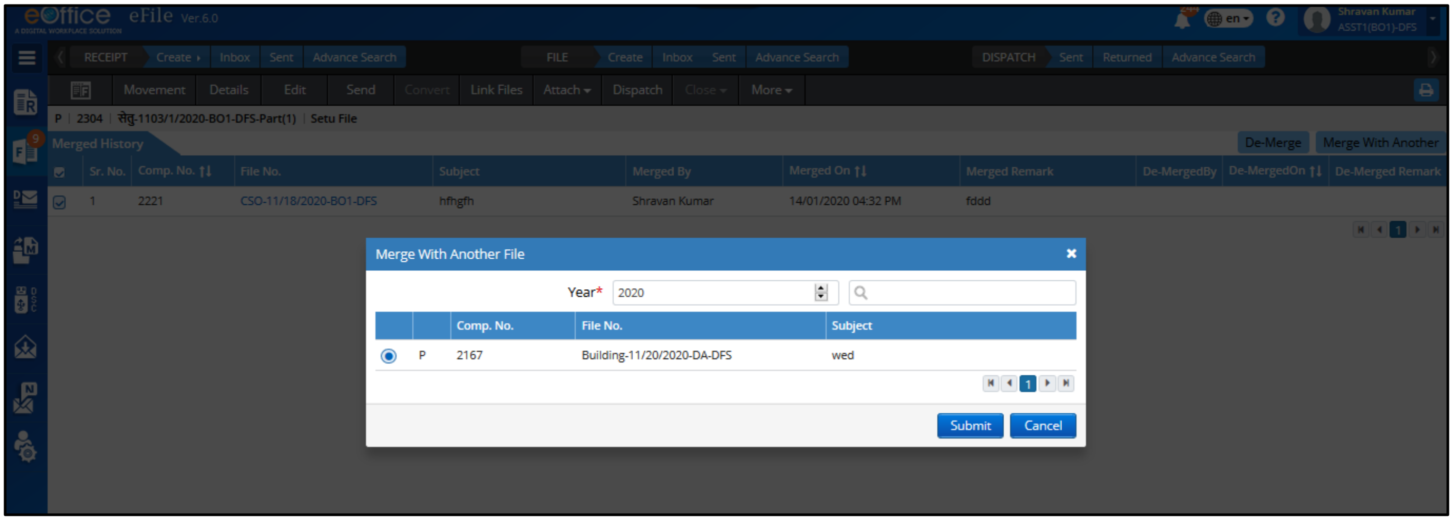


Figure 248

4. Select File from the list of year wise sorted physical file in a pop up window.
5. Click **Submit** Button.

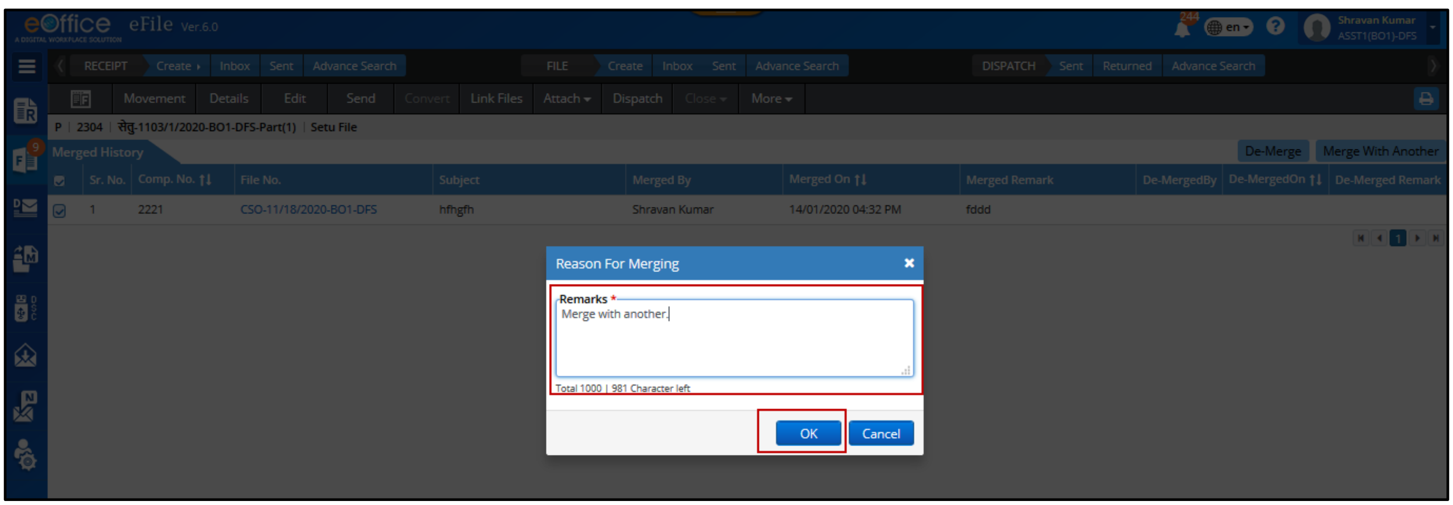


Figure 249

6. Enter mandatory **Remarks** in Confirmation pop up.
7. Click **OK** button.

Note:

- Selected Merged File will be Merged with another selected physical file.
- Merged Files details will be updated in Current File and new Main File.

Park Files

This feature is required to Park those files of File Inbox/Inbox Folders on which user needs to take action after a certain period of Time.

Important Points:

- ✓ Main file must be present in Inbox/Inbox Folder.
- ✓ Physical files in Inbox must be in received state.

STEPS TO FOLLOW:

1. Select Files using checkbox in File Inbox/Inbox Folder list or click open a file from Inbox/Inbox Folder.

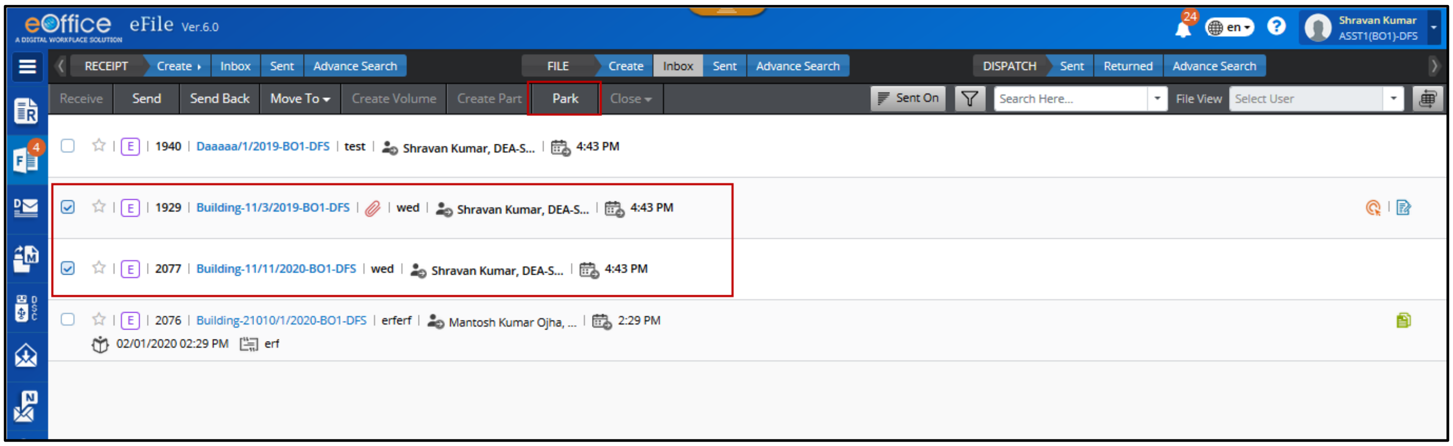


Figure 250

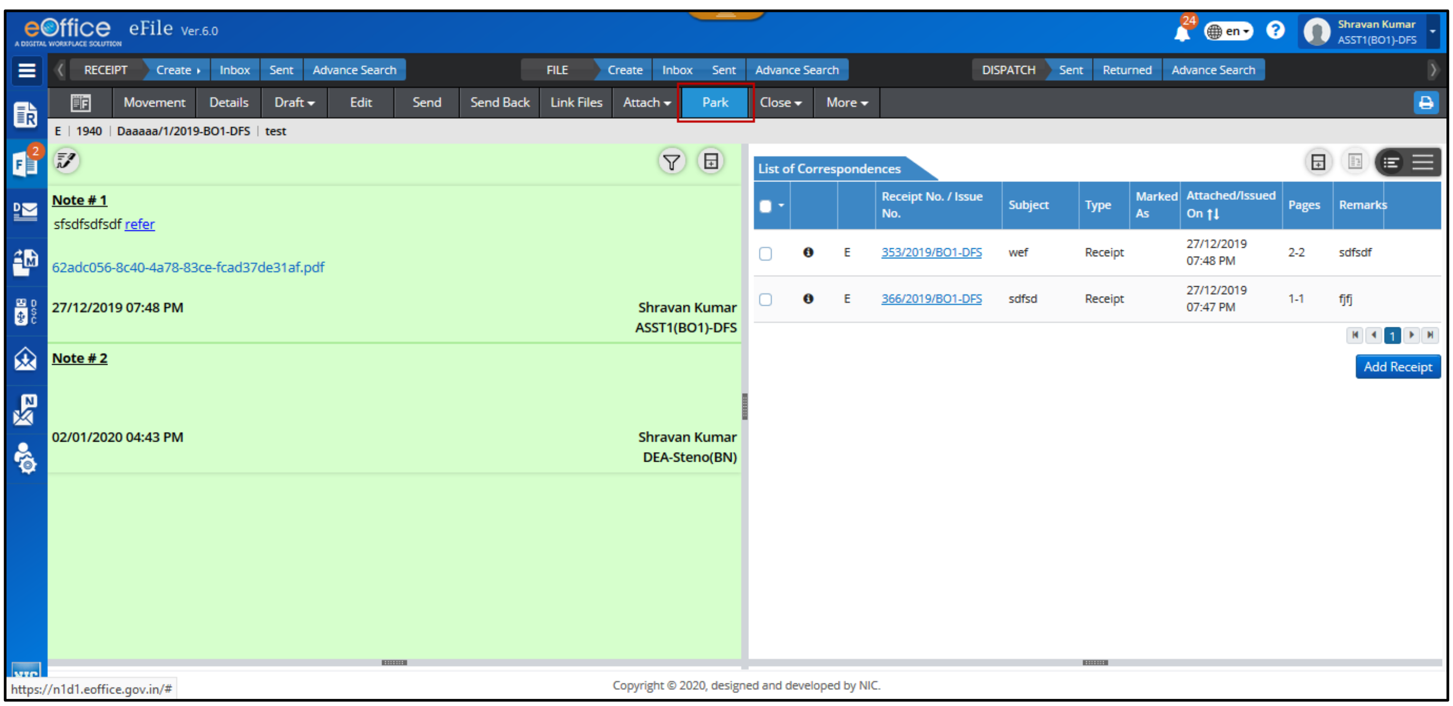


Figure 251

2. Click **Park** menu.
3. Provide **Parking Due Date** and **Parking Remarks** in Confirmation Pop up.
4. Click **OK** button.

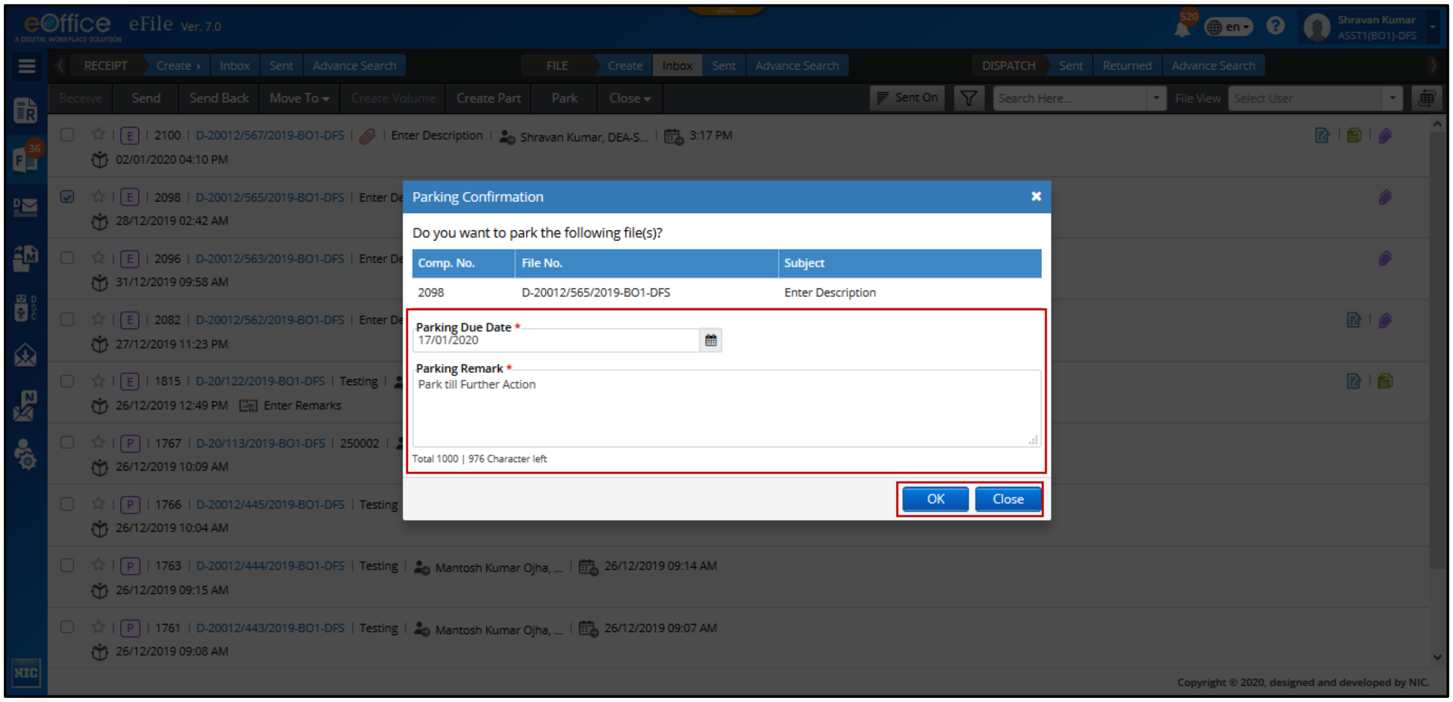


Figure 252

Note:

- List of parked files will be displayed under Parked link of Files module.
- File will be removed from inbox/inbox folder listing.
- User will be provided option to **Unpark** file.
- User will be provided option to Extend Parking Due Date.
- Park file history will be maintained in the Park History of File.

Parked Files

The Parked File is the list of Files Parked from Inbox/Inbox Folder. User can click **Parked** link under File module to view parked files.

- Parked File List can be **filtered** depending on **Nature**, **Parking Date** and **Due Date** by clicking Filter Icon in menu bar
- Parked Files can be searched using Module Search (Computer No., File No., Subject and Remarks)
- Parked Files can be **Unparked**

STEPS TO UNPARK FILE:

1. Click **Unpark menu** after selecting files or click **Unpark link** with respect to parked file

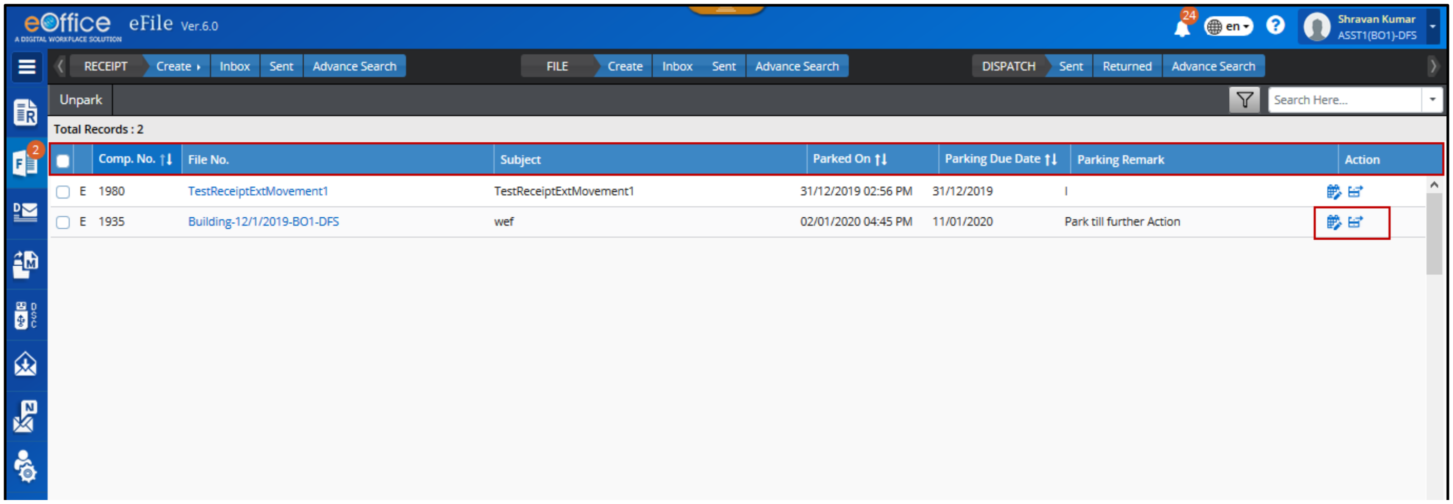


Figure 253

2. Enter mandatory **Remark** in Un-parking Confirmation pop up.
3. Click **OK** to un- park the file.

- **Due Date of Parked** File can be edited.

STEPS TO EDIT DUE DATE OF PARKED FILE:

1. Click **Edit Due Date link** with respect to parked file.
2. Select Extended **Parking Due Date** Edit Parking Due Date Pop up.

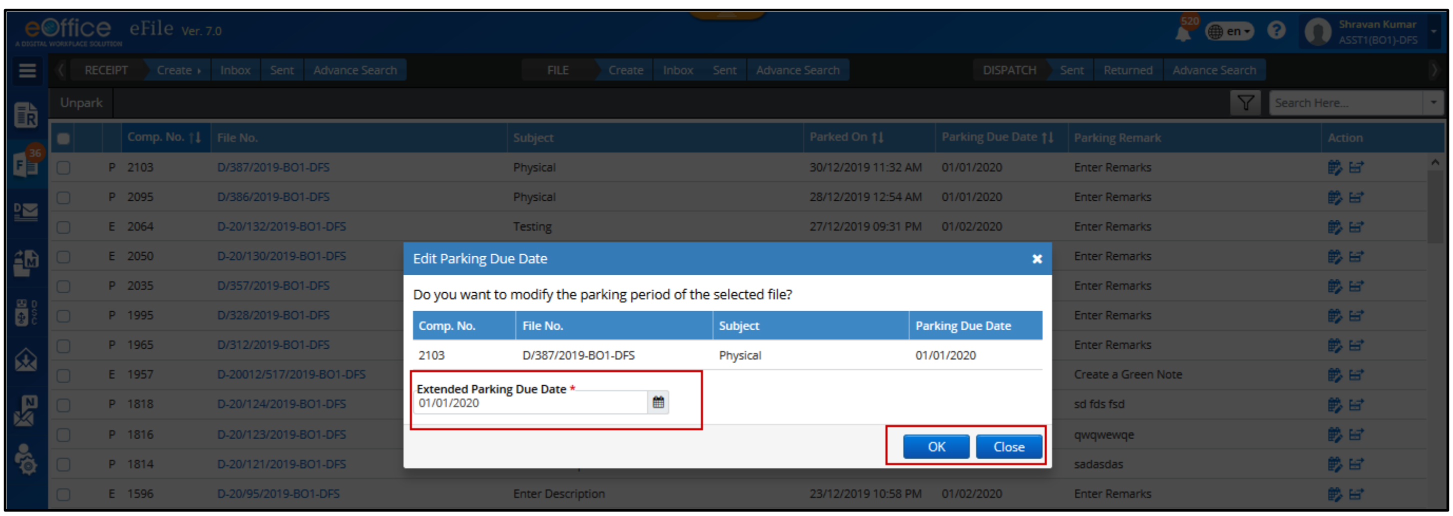


Figure 254

3. Click **OK** to update parking due date.

Note:

- List of transferred file(s) from Created Folder of other Post will be displayed under Parked Files List.

View File Details

Various details of File can be viewed by clicking on Details menu in File Inner Page.

- **Basic** metadata (File No., Opening Date, Main Category, Sub Category, Previous Reference, Later Reference, Read On, Subject and Remarks) will be displayed.
- List of attached/detached File(s)/Receipt(s) will be displayed under **Attached/Detached** tab of Files History section.

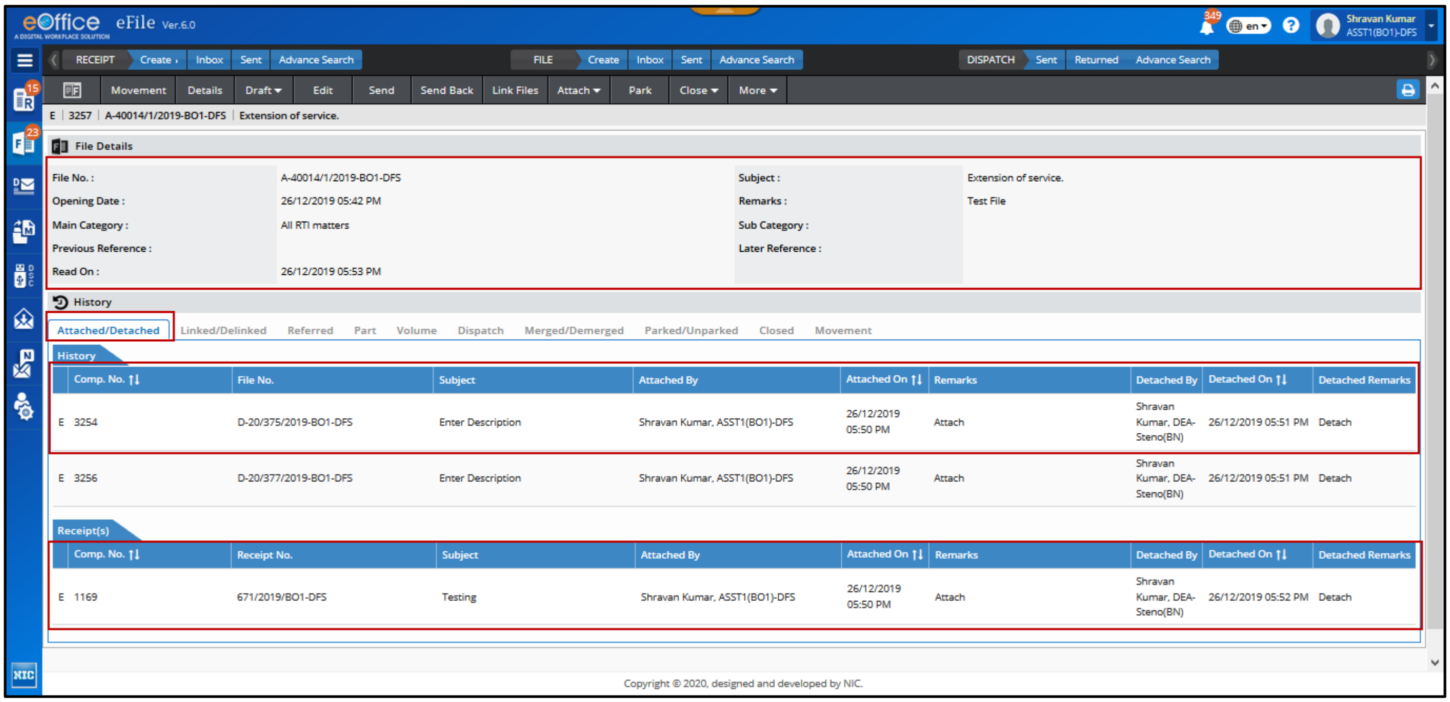


Figure 255

Note:

- Attach/Detach history should not be maintained if attached File(s)/Receipt(s) get detached without any movement of File

- List of Linked/Delinked Files will be displayed under **Linked/Delinked** tab of Files History section.

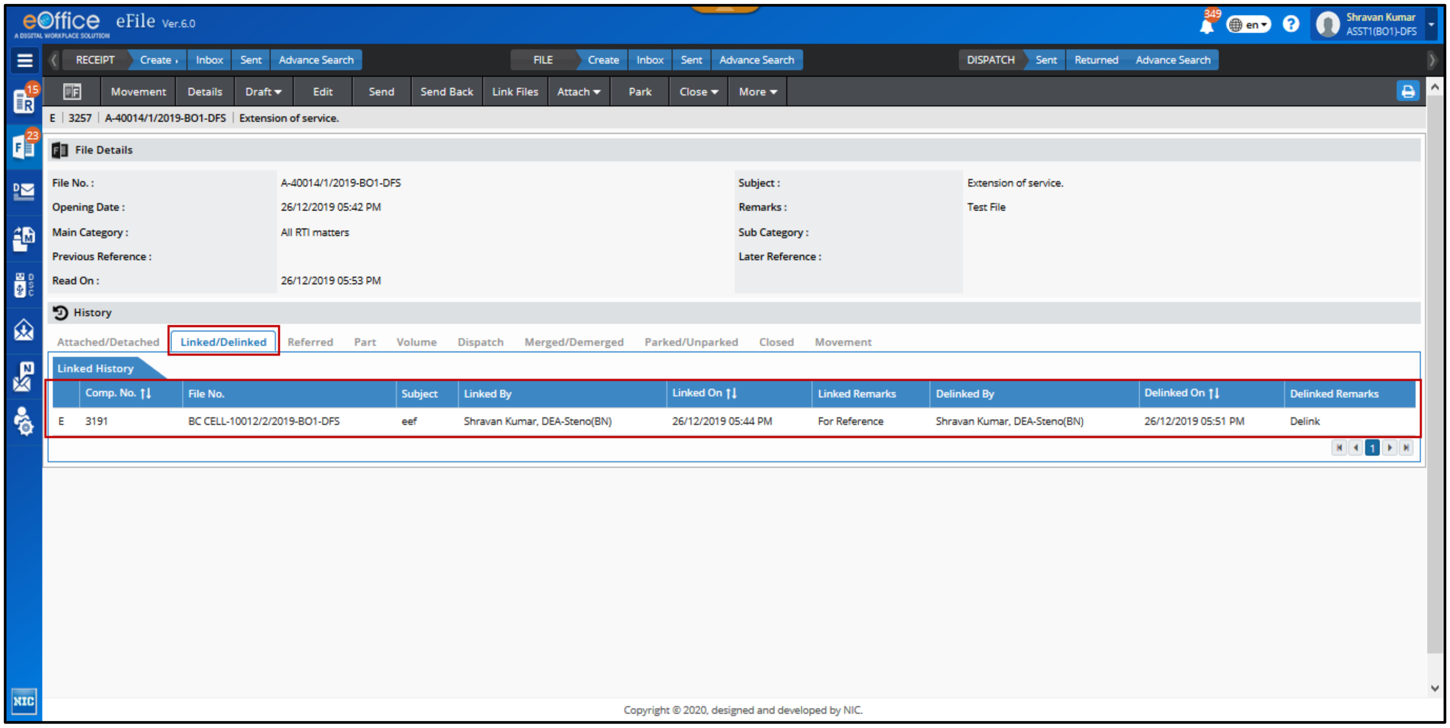


Figure 256

Note:

- Linked/Delinked history should not be maintained if linked File(s) get delinked without any movement of File.

- List of files in which opened file is linked will be displayed under **Referred** tab of File History Section.

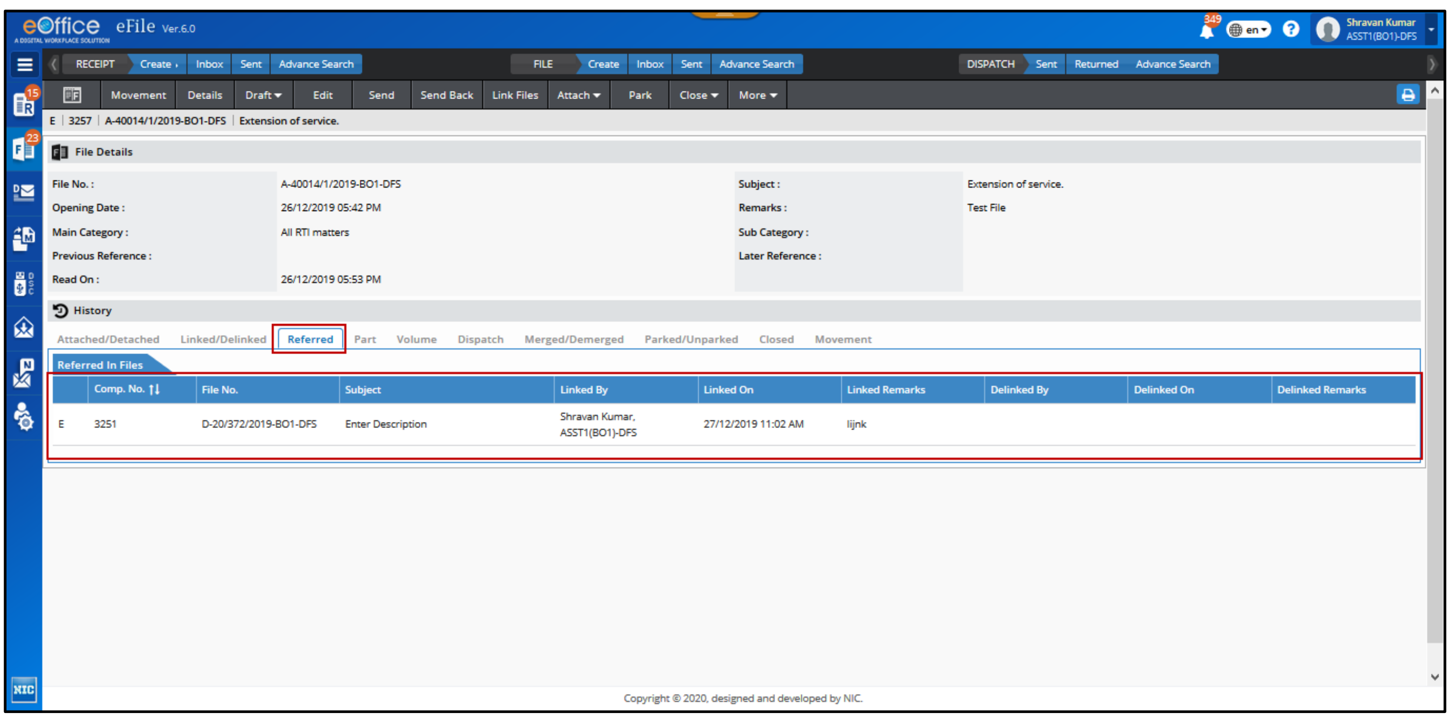


Figure 257

Note:

- Referred history should not be maintained if linked File(s) get delinked without any movement of File in which opened file is linked.

- List of Part files will be displayed under **Part** tab of File History section.

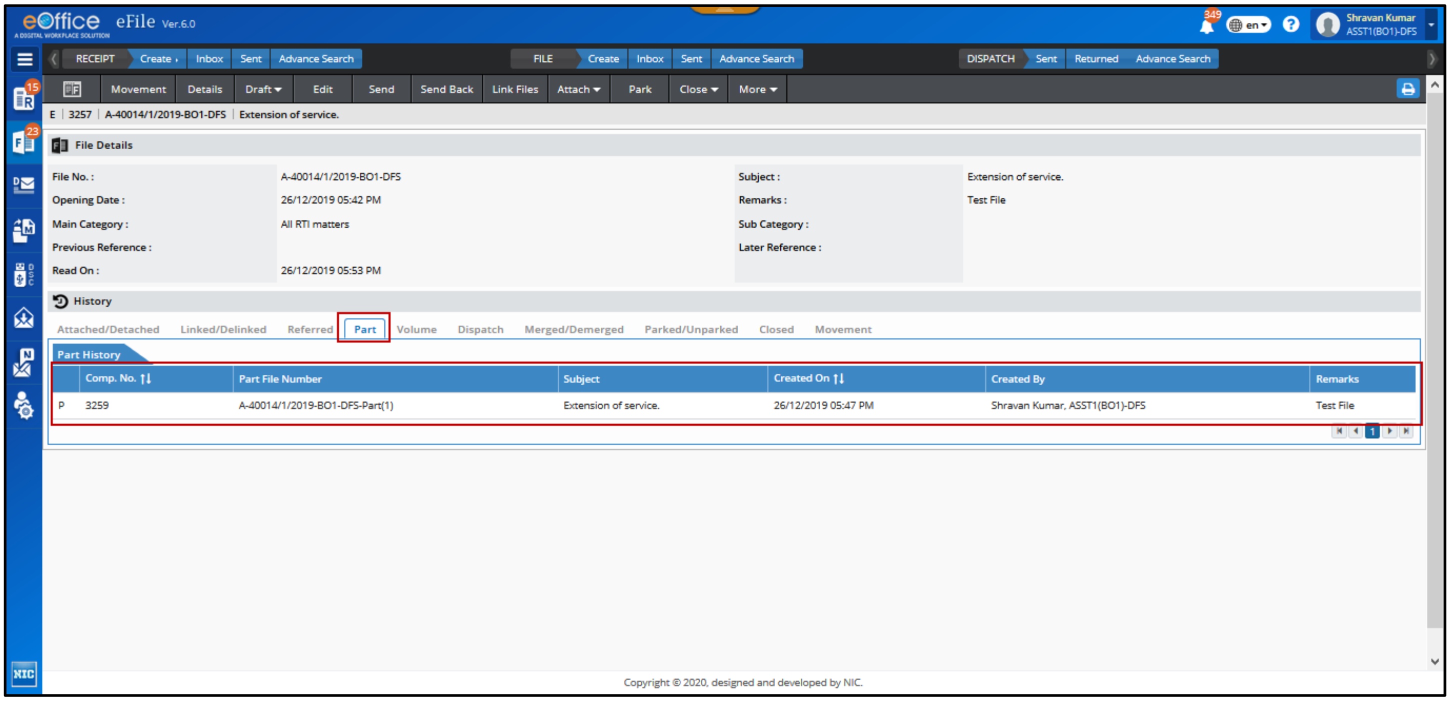


Figure 258

- List of Volume files (only applicable for Physical files, converted electronic files) will be displayed under **Volume** tab of File History section.

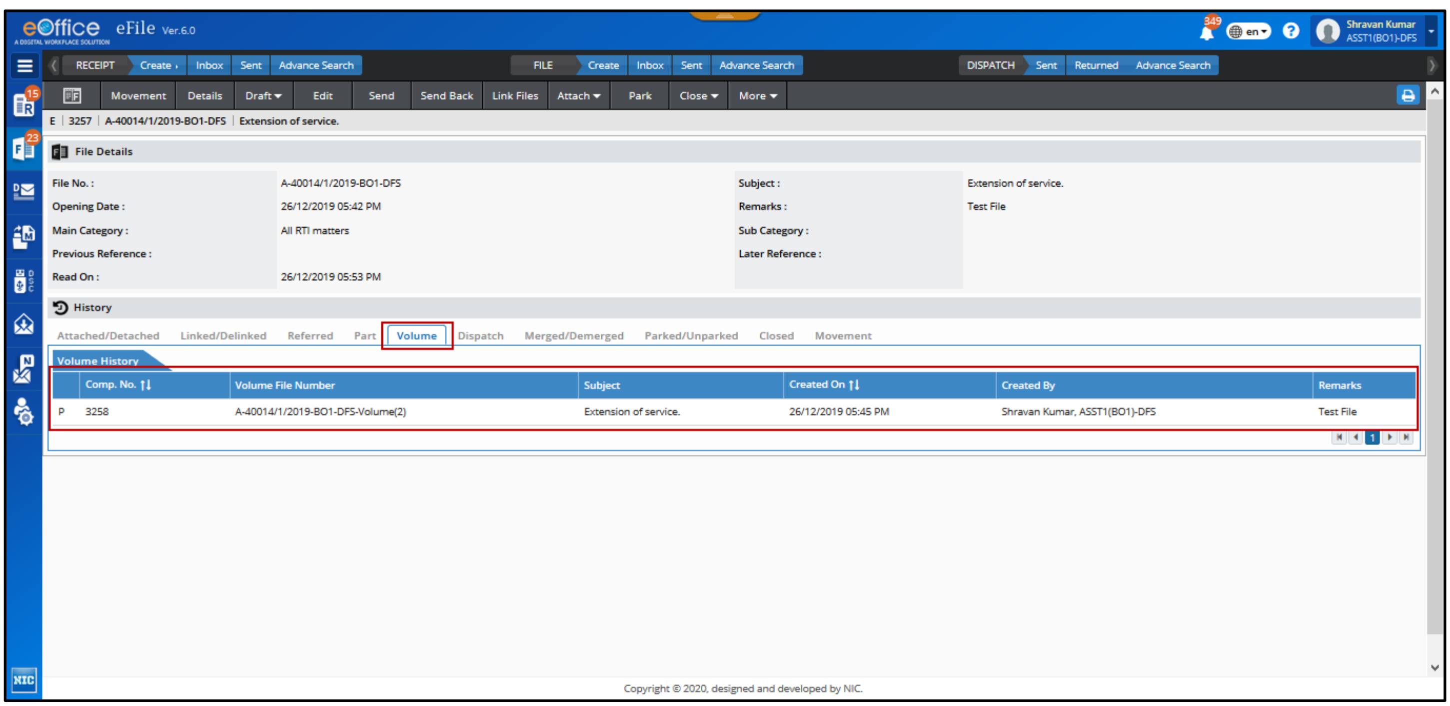


Figure 259

- List of Dispatch will be displayed under **Dispatch** tab of File History section.

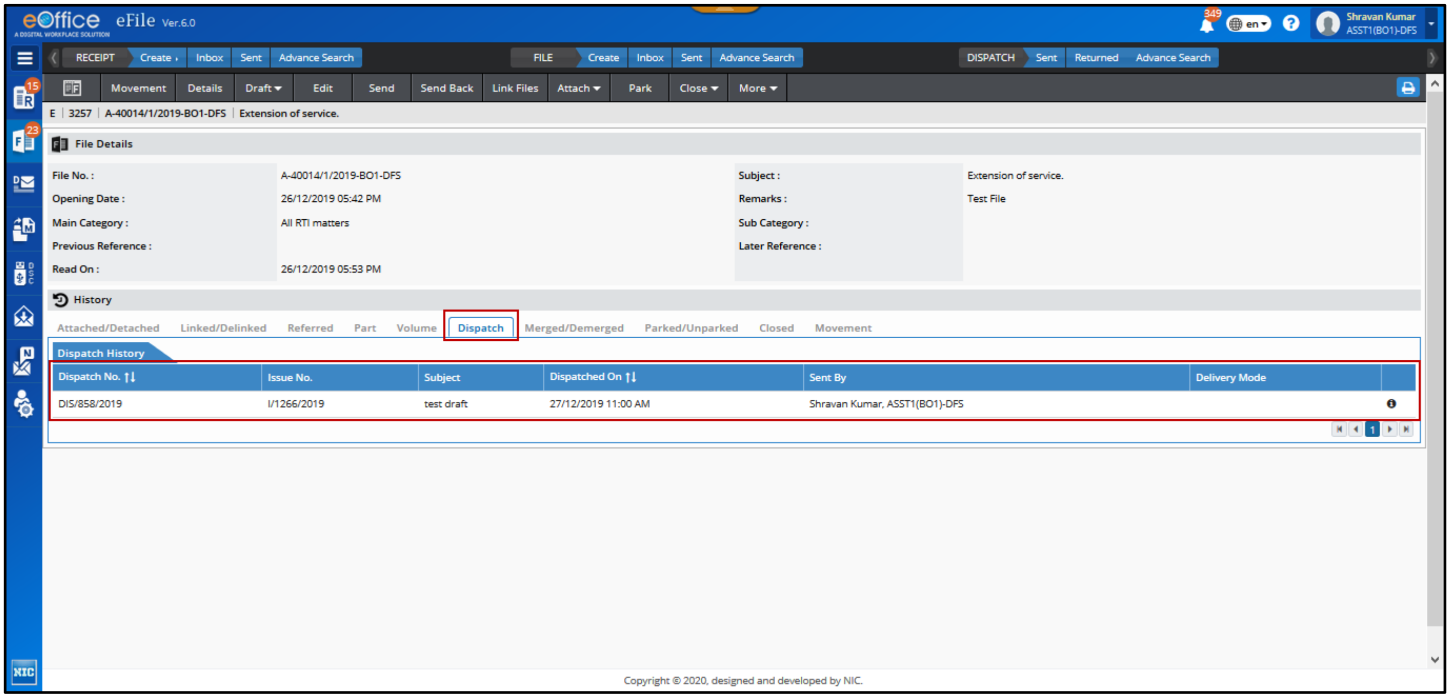


Figure 260

- Merge Details of File will be displayed under **Merged/Demerged** tab of File History section.

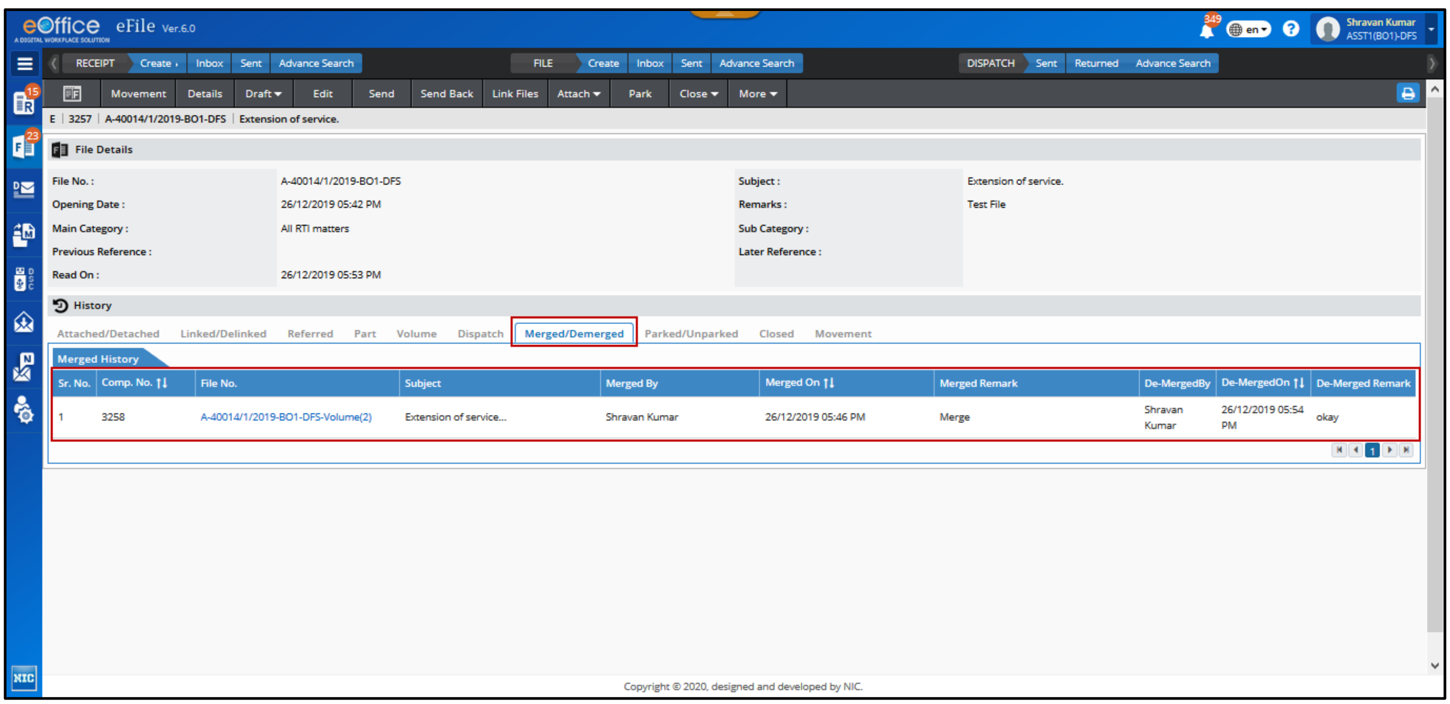


Figure 261

Note:

- Merged history should not be maintained if merged Files get demerged without any movement of File.

- Parking History of File will be displayed under **Parked/Unparked** tab of File History section.

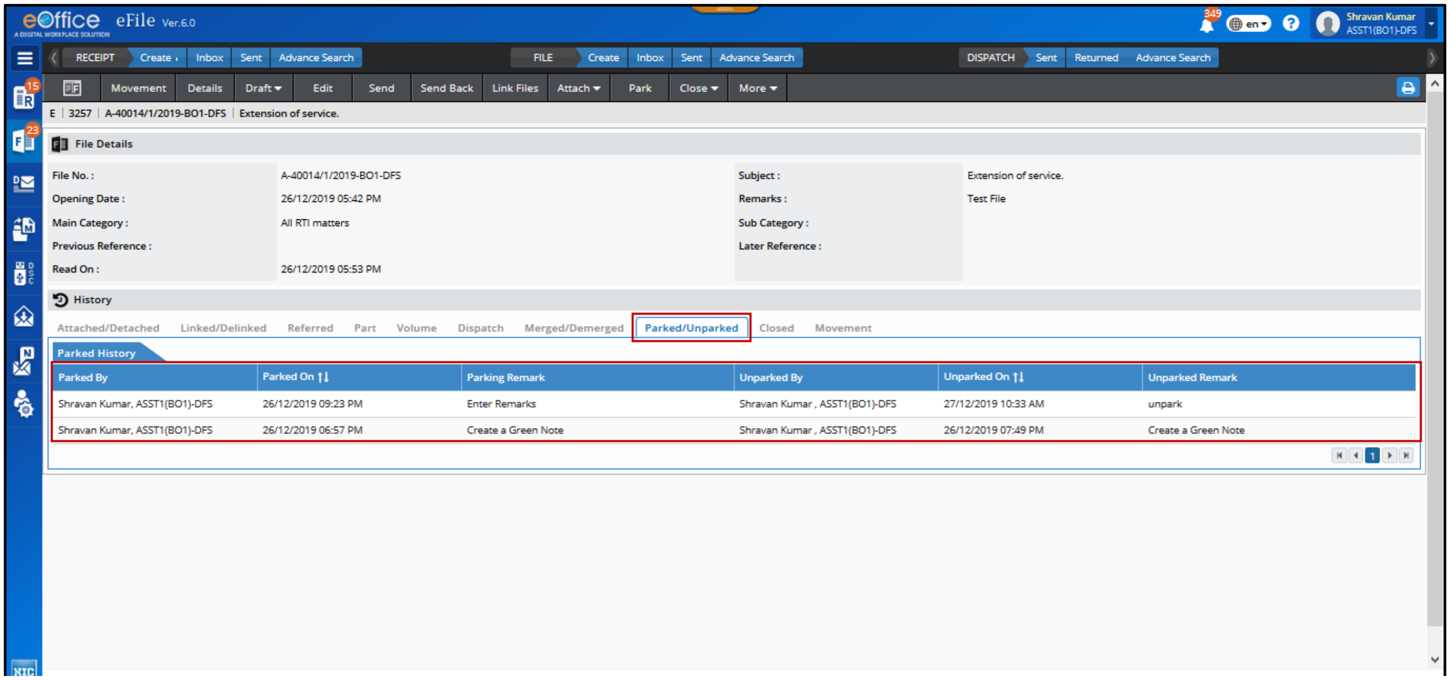


Figure 262

- Closing History of File will be displayed under **Closed** tab of File History section.

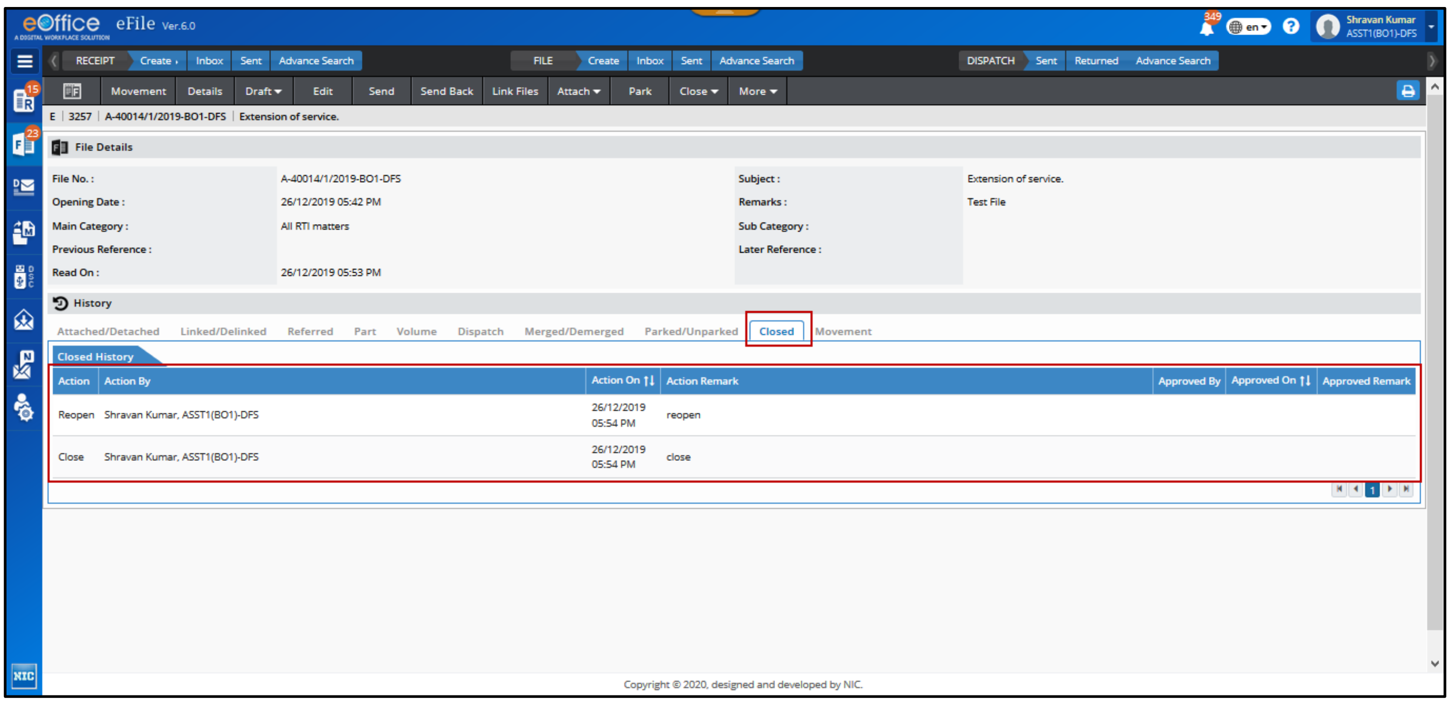


Figure 263

Create Draft (DFA) in an Electronic File

Draft for approval (DFA) can be created in a standalone Electronic File (Not Attached with any other File/Receipt) available in Inbox/Inbox folder/Created/Parking list. There can be three different nature of Draft that can be created.

i. **New Fresh Draft**
ii. **Reply Draft**
iii. **Reminder Daft**

Create a New Fresh Draft

STEPS TO FOLLOW:

1. Click **Create New Draft** submenu of Draft menu from file inner page menu bar.

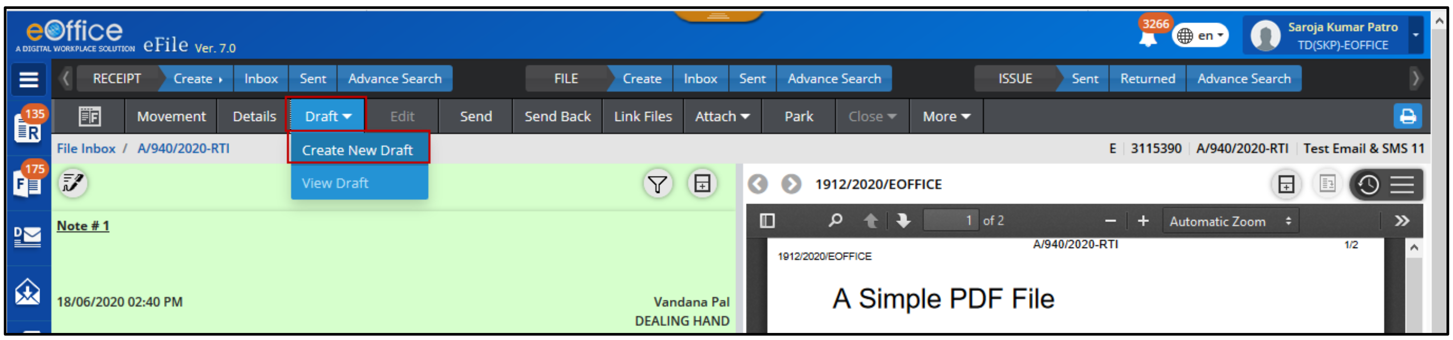


Figure 264

2. Select from pre-defined draft **template** or **Upload** a file (*PDF or Word Document Only upto 25 MB*) or **Type**or paste copied content in the text area to create draft content.

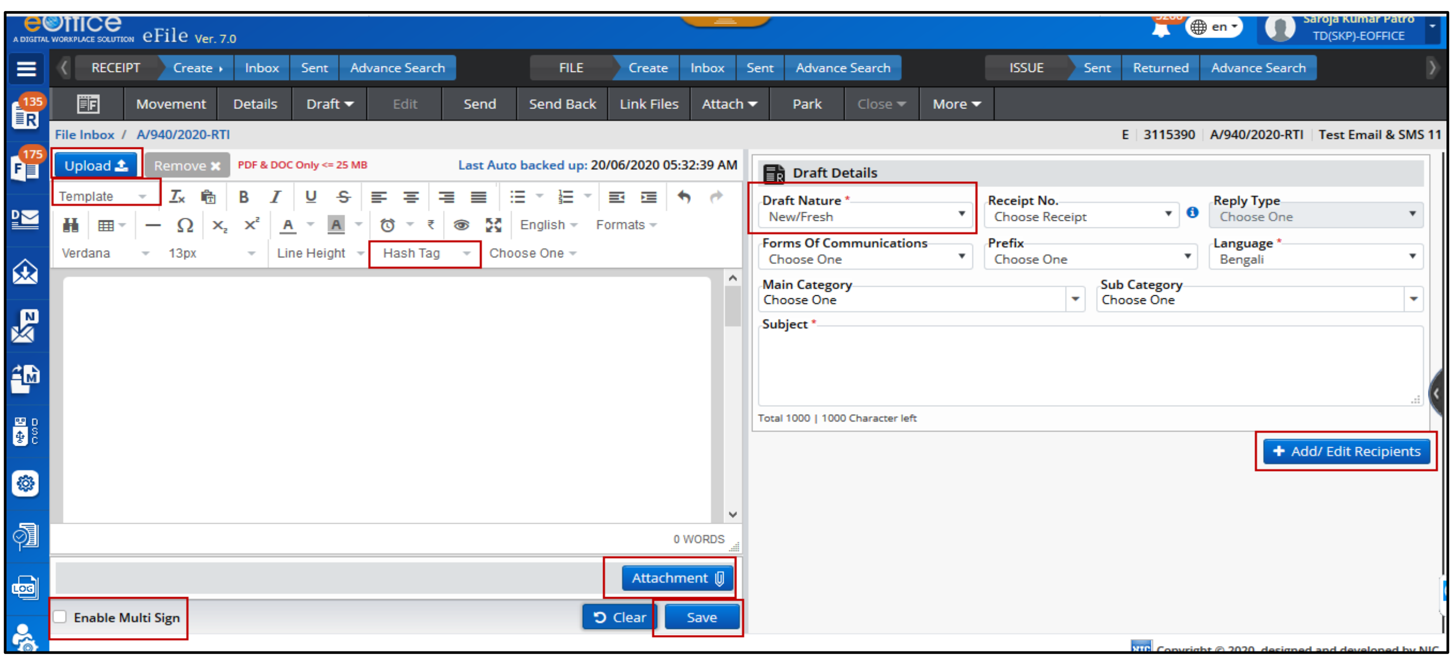


Figure 265

3. Add **Hash Tag** if required (*If draft created using Text Editor or Template*)
4. Add **Attachment** if any.
5. Check **Enable Multi Sign** checkbox. (*If draft needs to be signed by multiple signing authority)*
6. Fill basic metadata categorized under Draft Details.
7. Click **Add/Edit Recipients** (*Optional at time of Draft Creation*) action button.
8. Click **Save** to Save the draft and generate unique draft number.

Create a Reply Draft

Important Points:

- ✓ Receipt (*of same or external instance*) must be attached as a correspondence in file.
- ✓ Attached receipt in correspondence should not be in closed state.

STEPS TO FOLLOW:

1. Click **Create New Draft** submenu of Draft menu from file inner page menu bar.**Figure 264**
2. Select from pre-defined draft **template** or **Upload** a file (*PDF or Word Document Only upto 25 MB*) or **Type** or paste copied content in the text area to create draft content.
3. Add **Hash Tag** if required (*If draft created using Text Editor or Template*)
4. Add **Attachment** if any.
5. Check **Enable Multi Sign** checkbox. (*If draft needs to be signed by multiple signing authority*)
6. Fill basic metadata categorized under Draft Details.
7. Select Draft Nature as Reply(*Available only when file has active receipts in correspondence)*

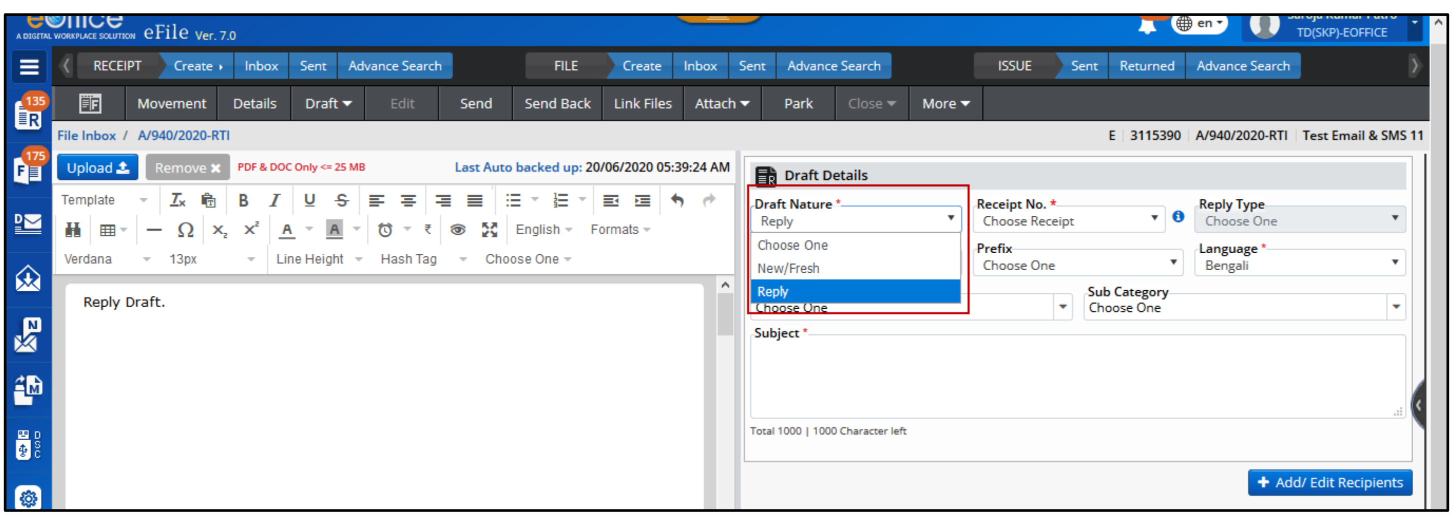


Figure 266

8. Select Receipt No. if there are multiple receipts in ToC.

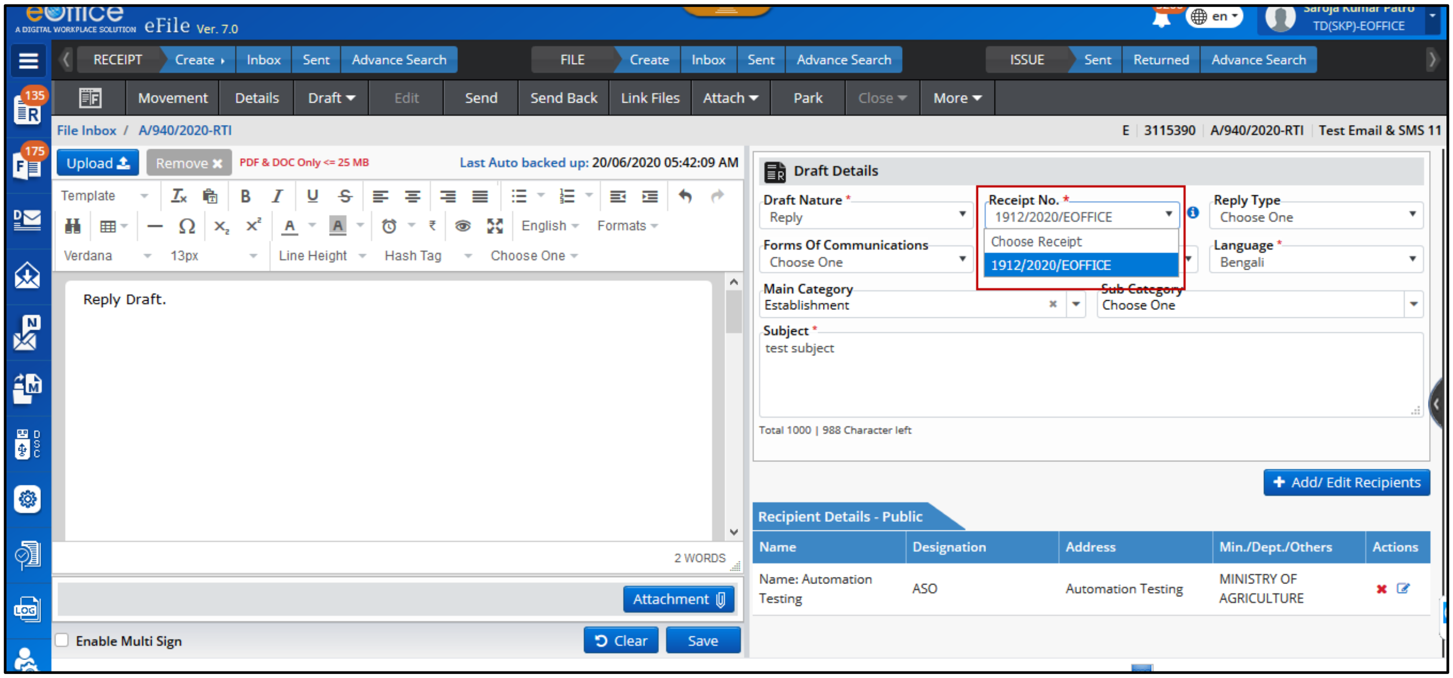


Figure 267

Note:

- If only one receipt is available in ToC, it will be selected by default
- **Recipient details, Main Category, Sub Category** and **Subject** of selected receipt are auto fetched in respective metadata fields.
- Clicking  **icon** will display details of Receipt.

9. Select **Reply Type** (Optional) from Drop down list.
10. Click **Add/Edit Recipient** (*Optional at the time of Draft Creation*) action button for adding more recipient.
11. Click **Save** to Save the draft and generate unique draft number.

Create a Reminder Draft

Important Points:

✓ Issue must be a present in correspondence of file.

STEPS TO FOLLOW:

1. Click **Create New Draft** submenu of Draft menu from file inner page menu bar.**Figure 264**
2. Select from pre-defined draft **template** or **Upload** a file (*PDF or Word Document Only upto 25 MB*) or **Type** or paste copied content in the text area to create draft content.
3. Add **Hash Tag** if required (*If draft created using Text Editor or Template*)

4. Add **Attachment** if any.
5. Check **Enable Multi Sign** checkbox. (*If draft needs to be signed by multiple signing authority*)
6. Fill basic metadata categorized under Draft Details.
7. Select **Draft Nature** as **Reminder**(*Available only when file has Issues in correspondence*)

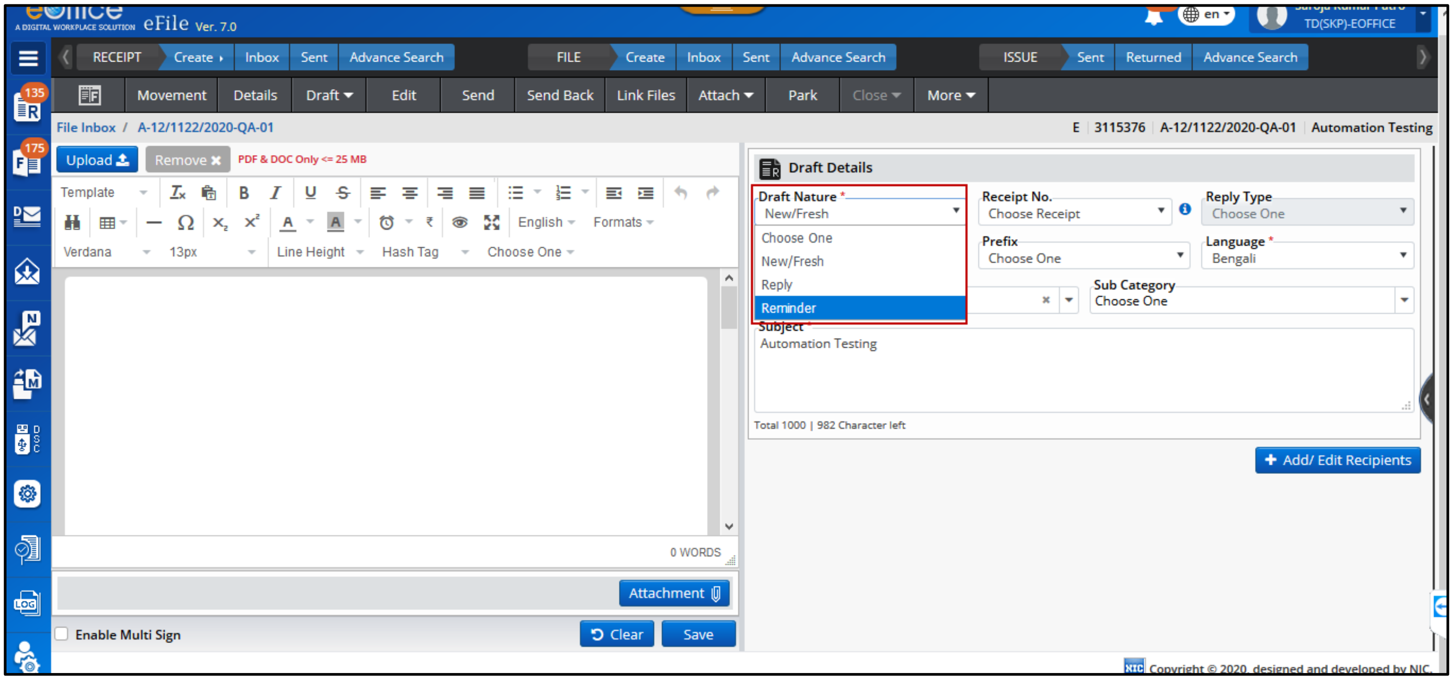


Figure 268

8. Select **Issue No.** if there are multiple Issues in ToC. (*Reminder popup will open displaying list of all dispatches done on selected Issue*)

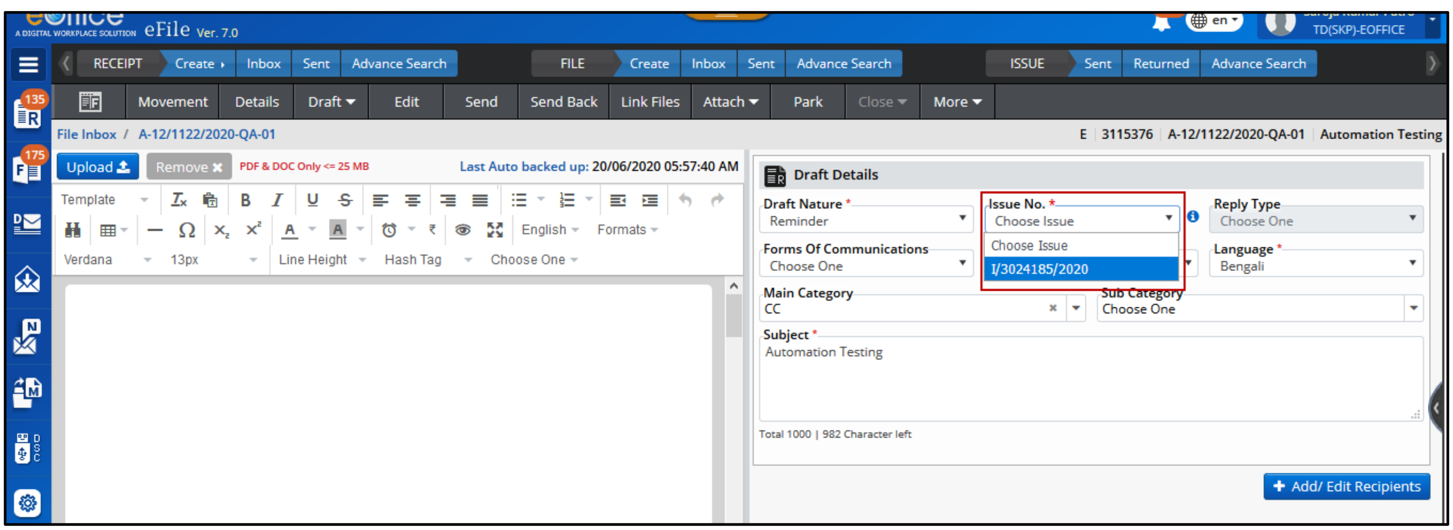


Figure 269

9. Click icon to view list of dispatches against selected Issue.
10. Select **Dispatch No**. from popup to create remainder and click **Submit**.

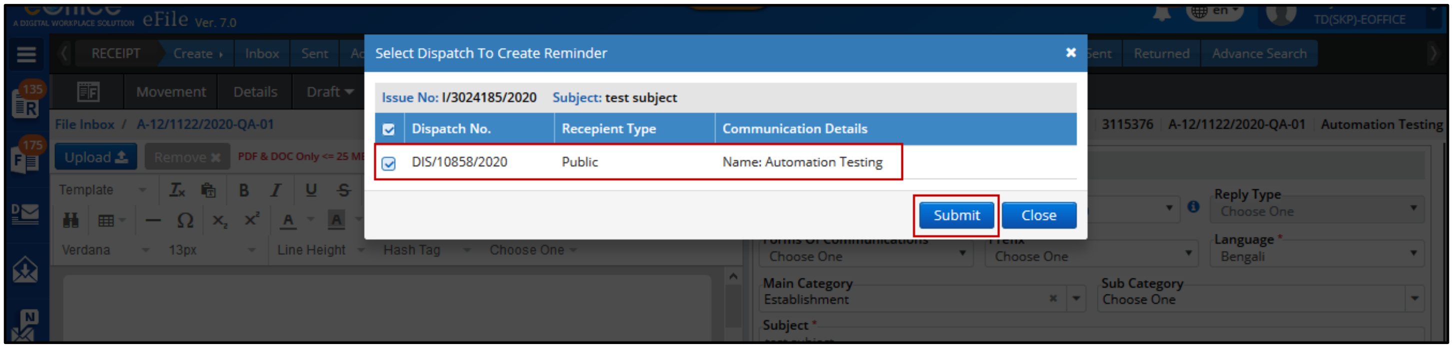


Figure 270

Note:

- **Recipient details, Main Category, Sub Category** and **Subject** of selected receipt are auto fetched in respective metadata fields.

11. Click **Save** to Save the draft and generate unique draft number.

Note:

- After saving Draft, a draft number will be generated for the draft and its state will be displayed as DFA with draft version as 1.
- Download Icon will be displayed if DFA is created by uploading Word document.
- Saved (Created) DFA will be in non-editable mode.
- Draft content (either typed or copied and pasted from word document in editor, Draft Details and Recipient Details get Auto Backed up if not saved by user. (In this case, Draft no. should not be generated)
- If Text editor is blank it will not be auto backed up or saved.
- Last Auto Backed up date and time (dd/mm/yyyy hh:mm AM/PM) will be updated in Draft Action Header after getting Auto Backed up.
- Clicking on Create new draft in a file having Auto Backed up Draft should open Auto Backed up content, which should be further edited or cleared using **Clear** action button.
- Created DFA can be viewed in Draft List (along with details as Draft No., Subject, Last Updated On, Status, Approved By and version details etc.) on right panel of File inner page.
- **Edit** and **Approve** Action button will be displayed for the saved draft.
- Legend will be provided in File Inner page/Inbox list page to indicate created draft.

View Draft List

Important Points:

- ✓ Electronic File containing the drafts must be in Created/Inbox/Inbox Folders/ Parked/Closed list.
- ✓ Electronic File must have drafts in DFA/Approved/Sign Pending/Signed State.

STEPS TO FOLLOW:

1. Click **View Draft** submenu of Draft menu from file inner page menu bar or **Draft List** Dropdown menu on Right panel of File Inner Page to view List of all created Drafts.

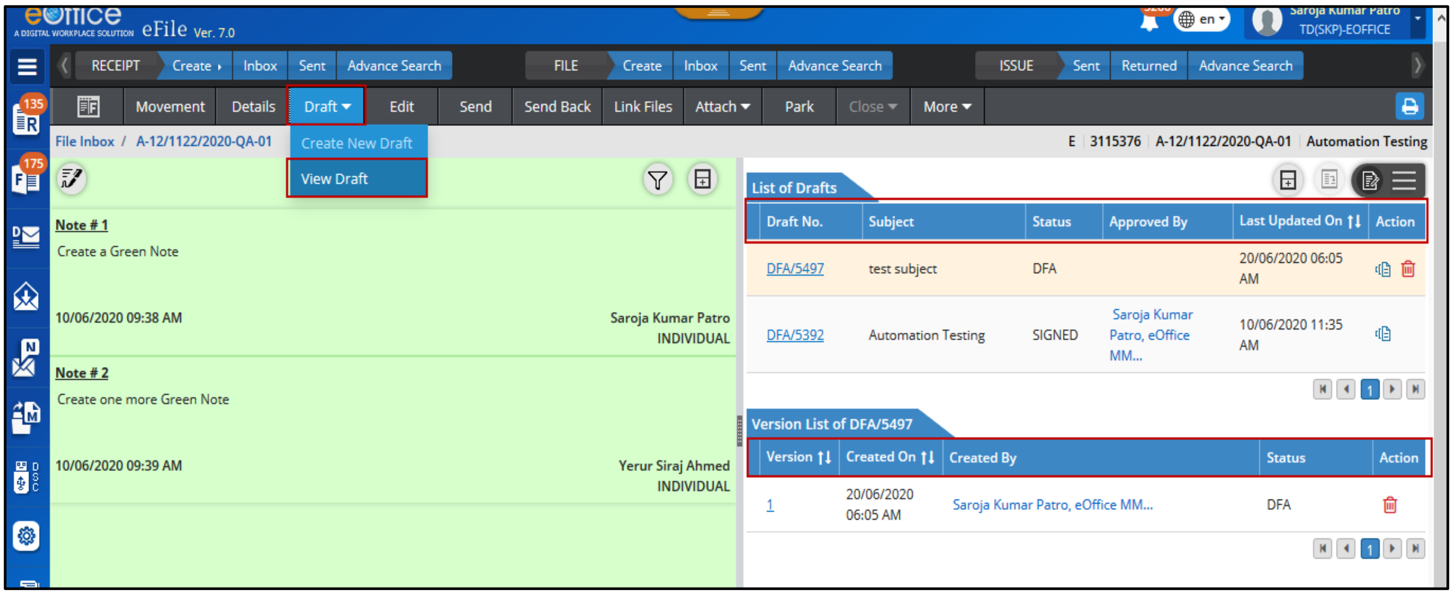


Figure 271

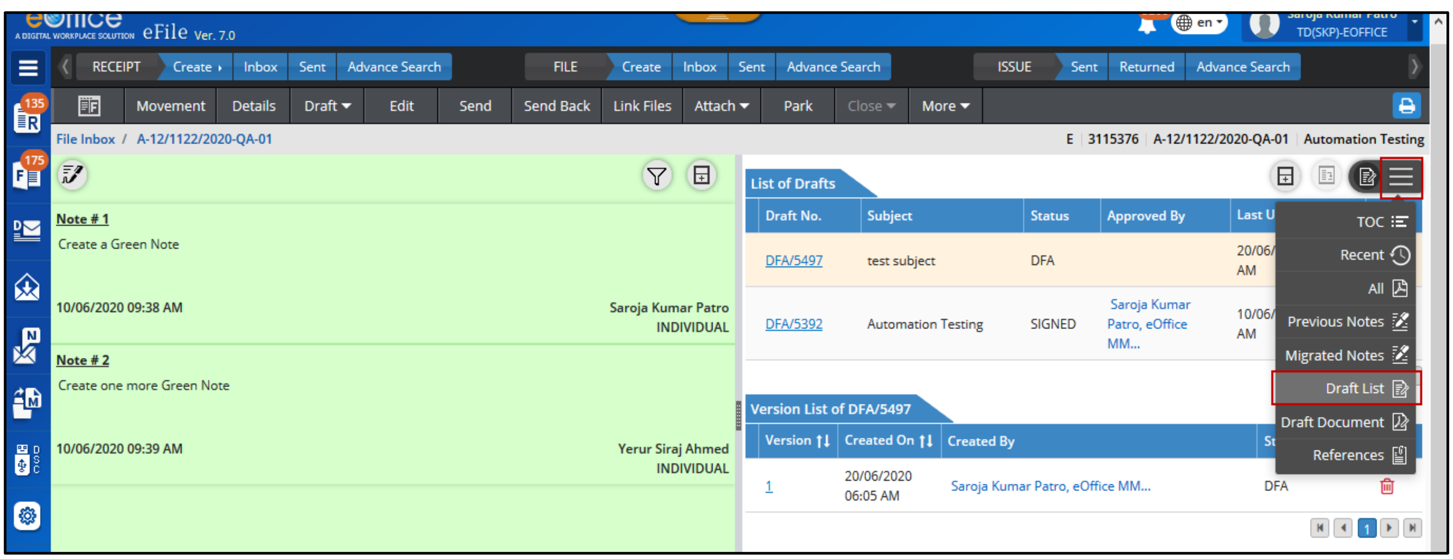


Figure 272

Note:

- User will be able to see list of DFA/DRAFT created by the users in a File in Draft list (user should be able to by default open draft list tab in right panel of file inner page using User Preferences Settings)
- User will be able to View Draft details (Draft No., Subject, Last Updated On and Approved By) and version details (Version, Created On, Created By, Status).
- User will be able to click open a draft, to view the Draft.
- User will be able to identify Draft with enabled Multi Sign (Demarcated using Icon).
- User will be able to view Signature Details (Signed By, Signed On, Signed Using (DSC/eSign)) by clicking on Signed Status.
- User will be able to take following action - Show Version and Delete.

Show Version

Clicking on Show Version Icon should display all version of respective draft.

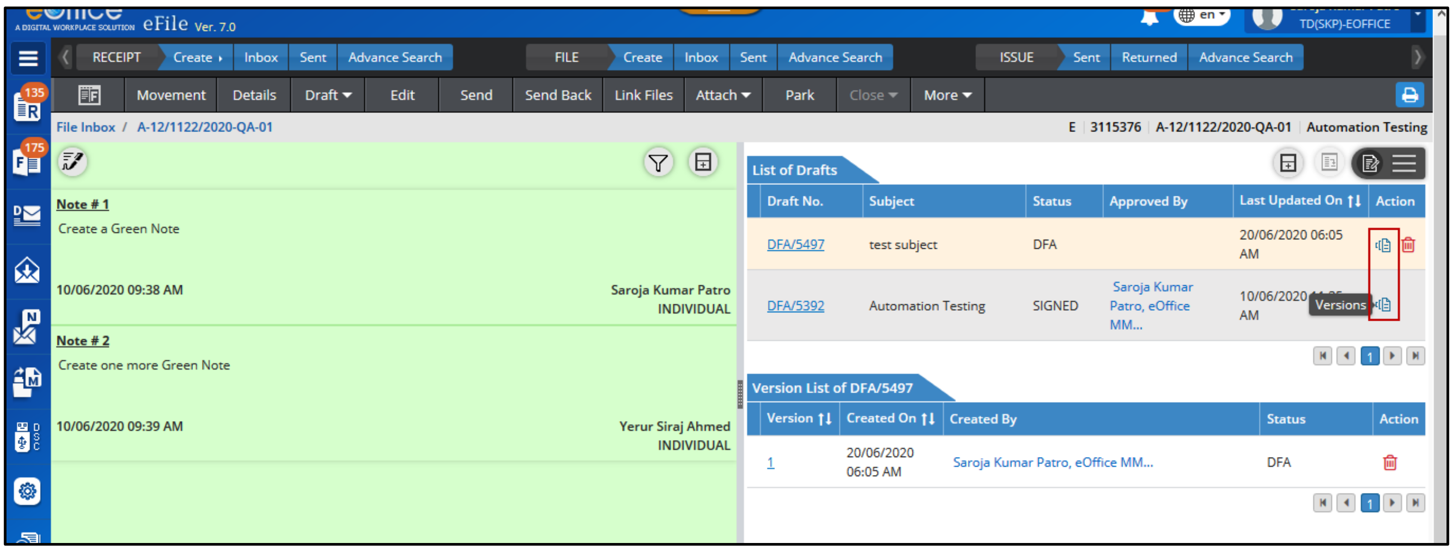


Figure 273

Delete Draft

Only Draft in DFA State can be deleted.

From Draft List

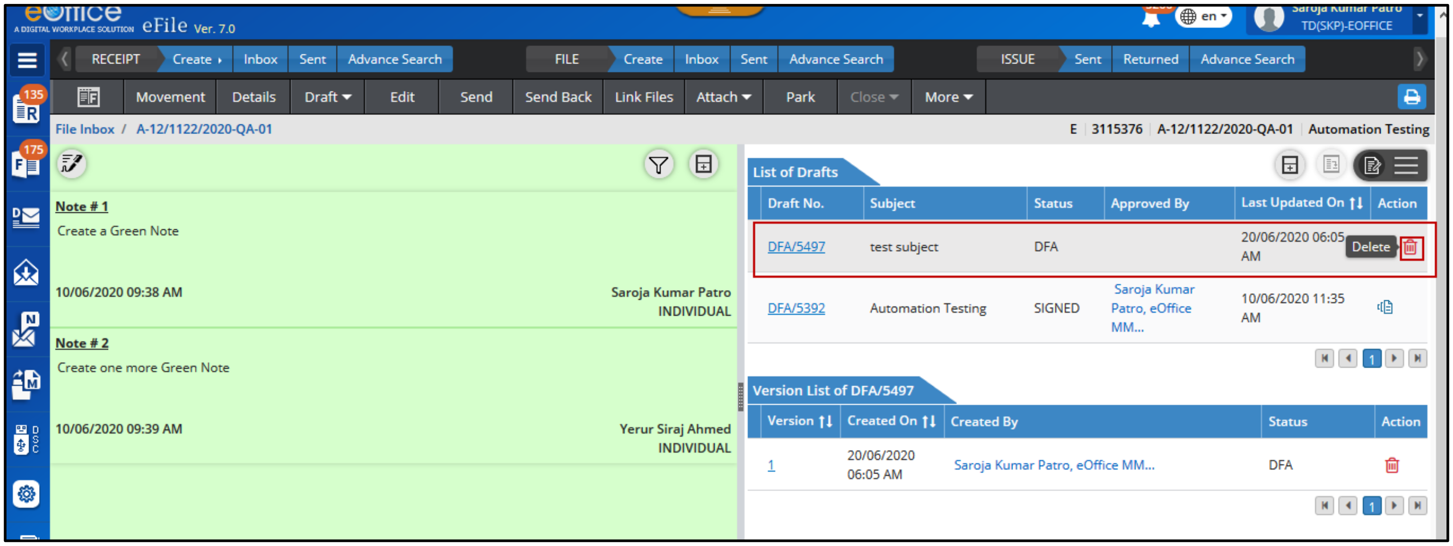


Figure 274

- **File without further movement (Single Version):** Clicking **Delete** Icon in draft list should remove the Draft and its version.
- **File with further movement (Single Version):** Clicking **Delete** Icon in draft list should change the Draft and its Version Status to **'DELETED'** and Draft No. and Version Link should become Inactive
- **File without further movement (Multiple Version):** Clicking **Delete** Icon in draft list should remove the latest created version (if any) and change the Draft and its other Versions Status to 'DELETED' and Draft No. and Version Link should become Inactive
- **File with further movement (Multiple Version):** Clicking **Delete** Icon in draft list should change the Draft and its Version Status to 'DELETED' and Draft No. and Version Link should become Inactive

From Version List

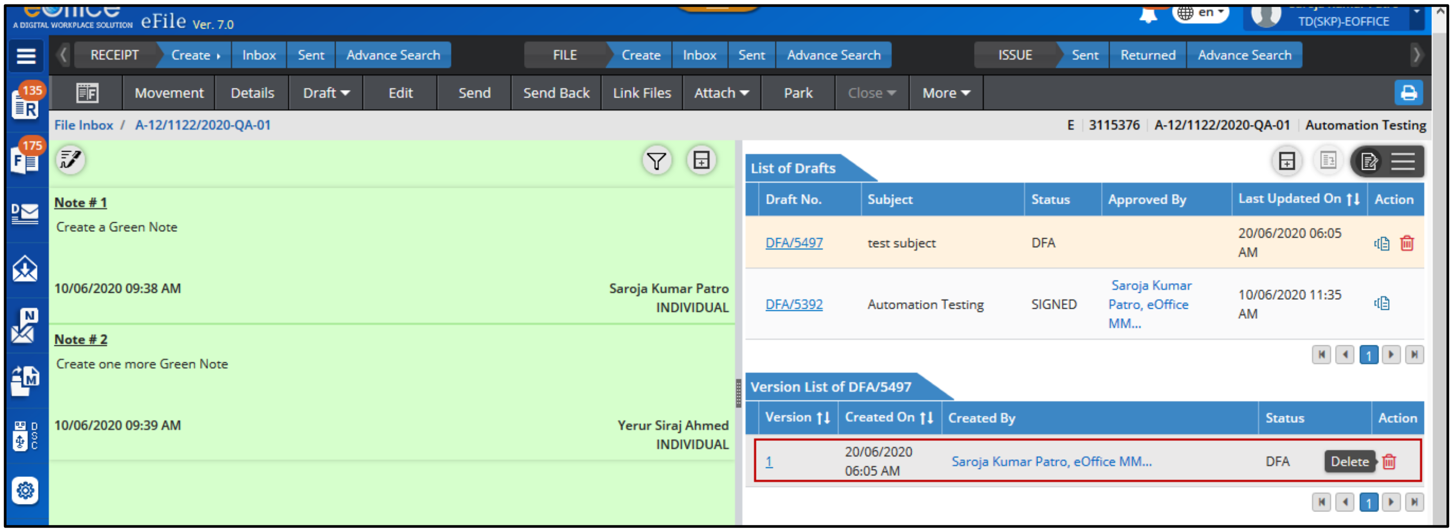


Figure 275

- **File without further movement (Single Version):** Clicking on Delete icon in version list of draft should remove version and draft associated with it.
- **File without further movement (Multiple Version):** Clicking on Delete icon in version list, should remove latest version (created by self) of draft.

Edit Draft (DFA)

This feature is required to edit draft (DFA) content, details and Add/Edit Recipient details.

Important Points:

- ✓ Created drafts must be available in the Draft List of the electronic file.
- ✓ Electronic File containing the saved draft (to be edited) must be in Created/Inbox/Inbox Folders/ Parked list.
- ✓ Draft to be edited must be in DFA state (with unique draft number).
- ✓ Draft to be edited must not be in Approved state.
- ✓ Draft to be edited must not be created by users of external eFile instances

STEPS TO FOLLOW:

1. Click **View Draft** submenu of Draft menu from file inner page menu bar or **Draft List** Dropdown menu on Right panel of File Inner Page to view List of all created Drafts. Refer View Draft.
2. Open unapproved draft from Draft List by clicking on **Draft No**.
3. Click **Edit** Button.

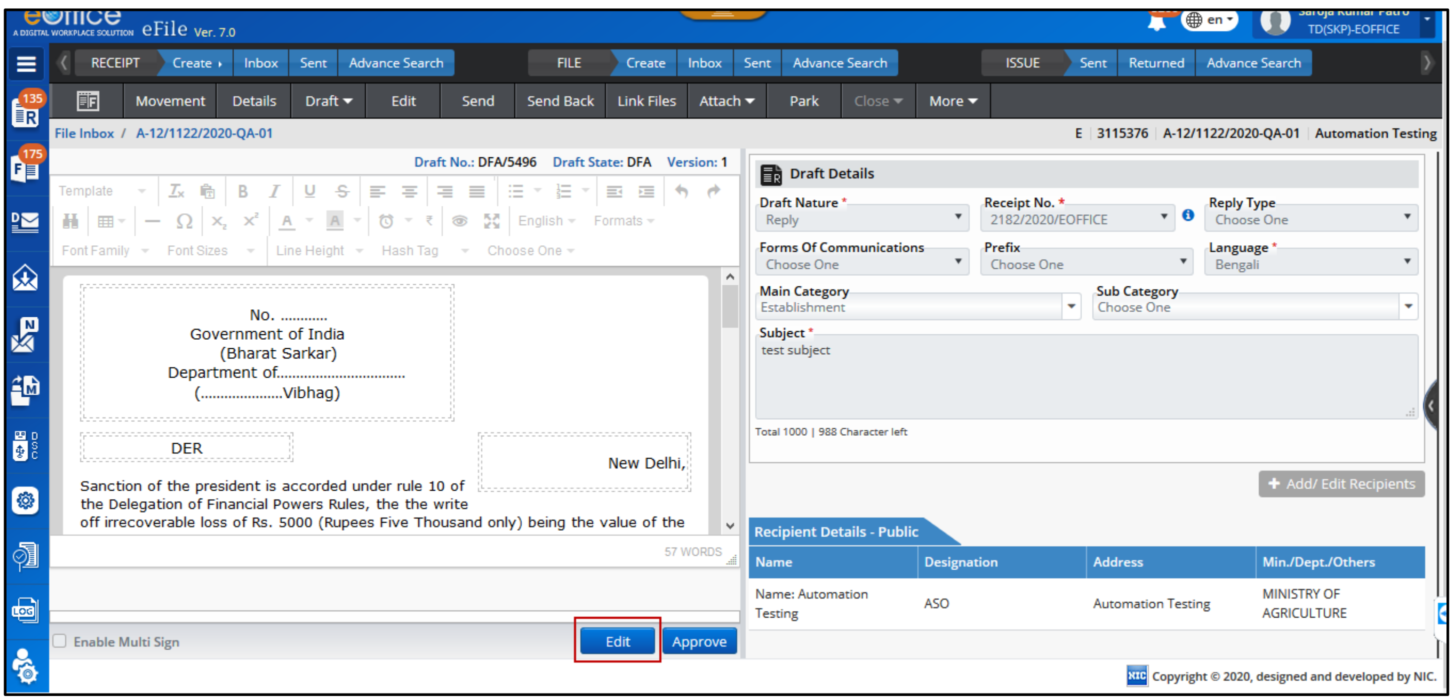


Figure 276

Scenario 1: **In Case of DFA created using DFA Editor or Template**

4. Saved content of the draft should be displayed in editable form

5. Edit content (option to type content, paste copied content and choose template will be available) as required.

Scenario 2 : **In Case of DFA created using uploading Word Document**

4. Download uploaded Word document by clicking **Download Icon** for further editing.
5. Click Upload button to select and upload updated/edited word document or a new document from local drive.

Scenario3 : **In Case of DFA created using uploading PDF/Word Document**

4. Remove uploaded draft by clicking Remove Icon
5. Enter content (option to type content, paste copied content and choose template will be available) as required.
6. Edit metadata (*If required*)
7. Add or remove attachment (*If required*)
8. Check/Uncheck **Enable Multi Sign** checkbox. (*If required*)
9. Click **Add/Edit Recipients** (*Optional*) action button.
10. Click **Update** to save the edited content of Draft.

Note:

- User will be able to edit and save draft metadata (excluding Draft nature, Receipt/Issue Number, Reply Type).
- Draft content, Draft Details and Recipient Details get Auto Saved if not saved by user.
- Text editor cannot be kept blank while editing an already saved draft.
- User will be able to remove or add attachment from Attachment list.
- New version of draft will be created subject to movement of File.
- User should be able view/edit any version of Draft until it is approved.

Add Recipient in Draft

This Feature allow user to **Add** Public, Intra eOffice and Inter eOffice Recipient in recipient detail list of draft/dispatch. Also user can **Edit** details of Public recipient and **Remove** recipients at any point of before final dispatch.

There are three type of Recipient that can be added in Draft/Dispatch.

i. **Public:** Public Users not having an eOffice Account
ii. **Intra eOffice:** Users of other departments available in same eOffice Instance
iii. **Inter eOffice:** Users of other departments available in other eOffice Instance

Important Points:

- ✓ Intra eOffice and Inter eOffice instance recipient can be added only for electronic Draft/Dispatch.
- ✓ Duplicity of Recipient will not be allowed.

STEPS TO FOLLOW:

1. Click **Add/Edit Recipient** in Draft/Dispatch Page to view Add/Edit Recipient popup window with Public→User (New) preselected.

   Note:

   - If recipient details are already listed in Draft/Dispatch it should be displayed in right –panel of Add recipient popup with option to edit/delete

2. Fill all available details of recipient (including mandatory fields) and click ADD.

   Note:

   - User details form gets reset to default value. Recipient Detail will be listed in right panel with option to edit/delete.)

3. Click **Close** button in right panel to close the Popup.

Note:

- To Add Recipient for Public , Intra eOffice and Inter eOffice, refer following link
  - Public Recipient
  - Intra eOffice Recipient
  - Inter eOffice Recipient

Approve Draft (DFA)

Approval of Draft in File will be same as approval of draft in receipt. Refer Approve Draft in Receipt.

Signing a Draft

Signing of Draft in File will be same as Signing an approved draft in receipt. Refer Signing a Draft in Receipt.

Dispatch from File

This feature allows User to **Dispatch Signed Draft** (Issue) letters through **Self** or **CRU** (Central Registering Unit) against an electronic receipt –

Electronic File

Dispatch from Electronic File will be same as Dispatch from Electronic Receipt (**Refer Page No.78**).

Physical File

STEPS TO FOLLOW:

1. Click opens a Physical File from **Created/Inbox/Inbox Folder** list of File.
2. Refer Dispatch from Physical Receipt from **Step 2** Onwards.

Send Files

This feature allows user to forward Files to other users from Inbox/Inbox Folder/Created List.

Important Points:

- ✓ File should be available in file inbox/inbox folder /created list.
- ✓ Physical files in Inbox should be in received state.

STEPS TO FOLLOW:

1. Select files or Click open a file from **Inbox/Inbox Folder** or **Created** list.
2. Click **Send** menu

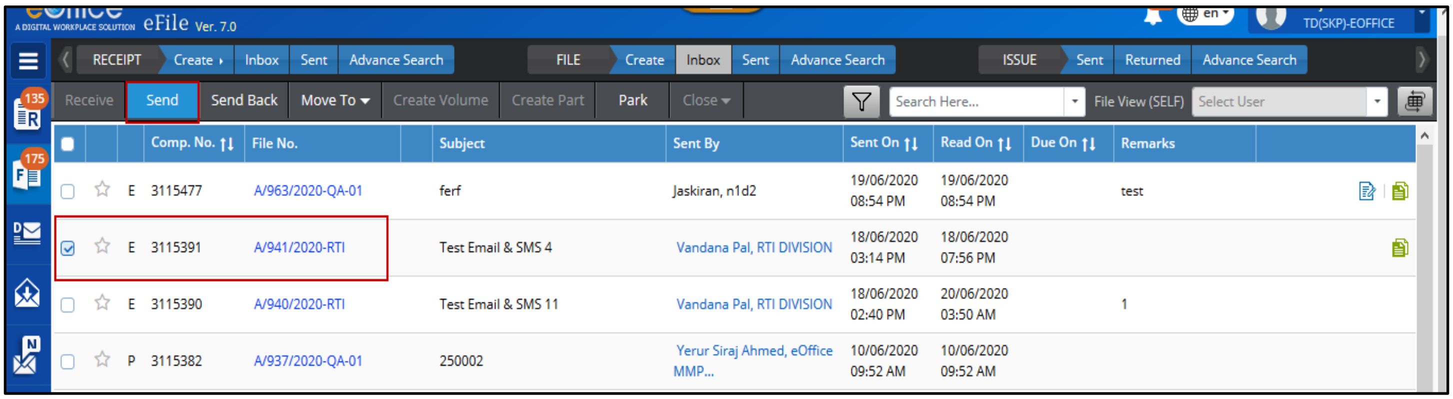


Figure 277

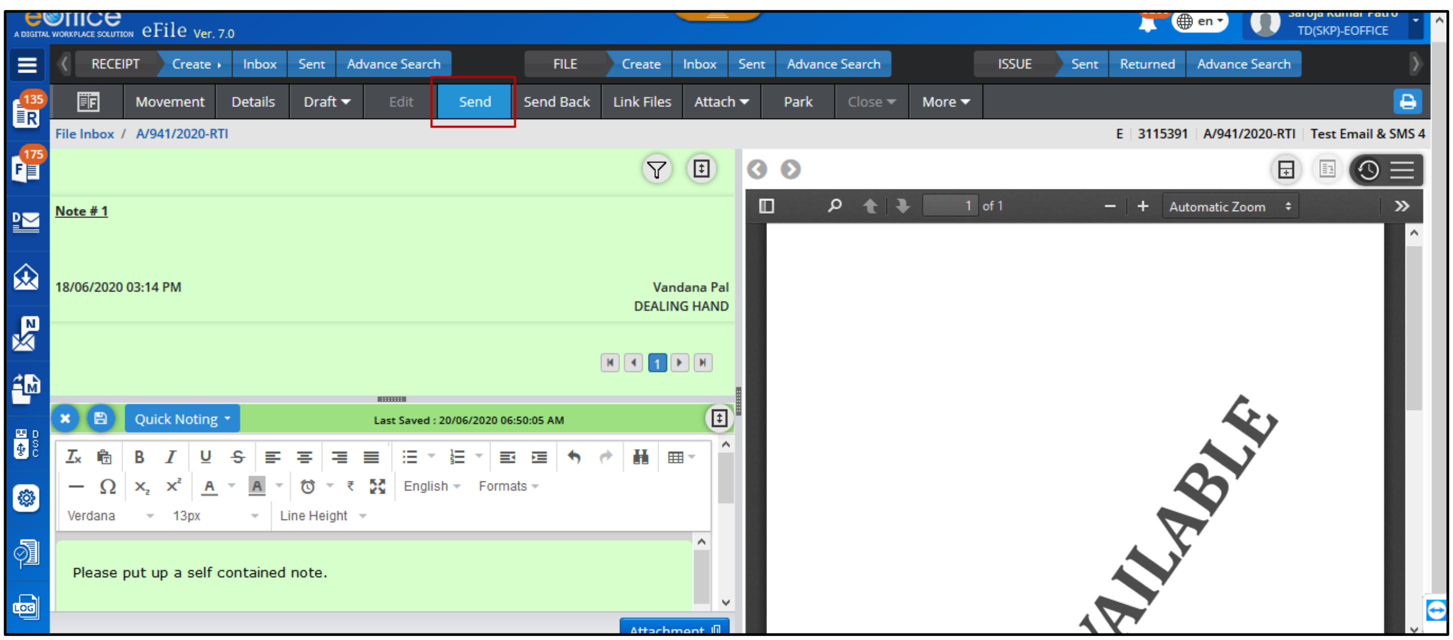


Figure 278

3. Select user in **To** field (Select the user from segregated employee List using any of "All" , "Recent 5", "In Channel", "Sub-ordinates", "Send Back" and "Reporting Officer").

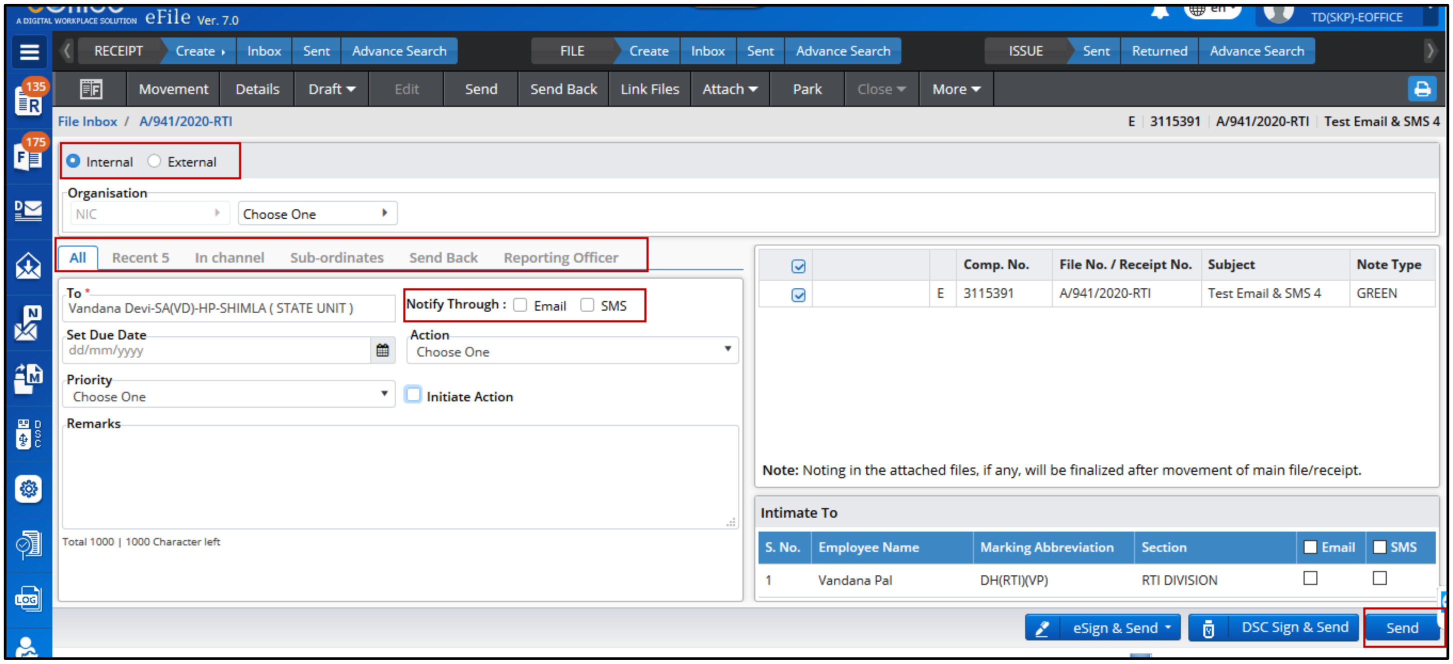


Figure 279

Note:

- **All:** List will display all the active users in the department.
- **Recent5:** List will display last five distinct users to whom file was sent respectively.
- **In channel:** List will display the list of users who were in channel of previous movement.
- **Sub-ordinates**: List will display the sub-ordinates placed below the logged in employee in the post (individual) hierarchy.
- **Send Back**: Previous sender of file will be displayed.
- **Reporting Officer**: List will display the reporting officer placed above the logged in employee in the post (individual) hierarchy.

Or

4. Select user in **To** field from the **Organization hierarchy** list in case for single instance multiple departments.

Or

5. Select user from **External→Department name**, in case user has to send the file to any external eFile instance
6. Select **Due Date**(*If Required*)
7. Select **Action**(*If Required*)
8. Select **Priority**(*If Required*)
9. Select **Initiate Action** and **Initiation Type** (*Configurable & role based*)
10. Enter **Remarks** (*Mandatory for Initiate Action*)
11. Select **Notify Through** (SMS/Mail) using checkbox to notify receiver. (*If required*)

12. Select **Intimate Through** (SMS/Mail) using checkbox to intimate users in previous movements. (*If required*).

13. Click **Send** to forward file.

Note:

- Sender Name and Post details shall be appended in Green Note of File automatically after movement.
- Entry of File Sending shall be updated in File Sent list of User and Movement details of File.

Send file with eSign

This feature allows user to digitally sign green note using eSign (Aadhaar based using OTP or Fingerprint).

Important Points:

- ✓ File should be available in file inbox/inbox folder /created list.
- ✓ Physical files in Inbox should be in received state.
- ✓ eSign Web service should be up and running.
- ✓ Web service URL should available in eFile application configuration table.
- ✓ User should have Aadhaar authenticated mobile number (For OTP based eSign) listed in the EMD.
- ✓ User should have Biometric Device (For Fingerprint/IRIS based eSign) connected to system.
- ✓ License Agreement (Consent of Authentication) should be made between the Department and eSign Service provider to avail the eSign service.

STEPS TO FOLLOW:

Follow Steps 1 to 12 as in sending a file, then click eSign and Send.

OTP based 'eSign & Send'

1. Click **eSign and Send** and choose option **'with OTP'**.
2. Read and agree to the '**Consent for Authentication form**' to proceed and then you will be redirected to the eSign service portal.
3. Enter your Aadhaar Number/Virtual ID and Click 'Get OTP'.
4. Enter the OTP received on the registered (with AADHAR) mobile number.
5. Click '**Submit**' to eSign and Send.

Fingerprint based 'eSign & Send'

1. Click **eSign and Send** and choose option with 'Fingerprint'.
2. Read and agree to the '**Consent for Authentication form**' to proceed and then you will be redirected to the eSign service portal.
3. Enter your Aadhaar Number/Virtual ID and Click 'Discover Biometric Device'.
4. Select the Fingerprint scanner from the discovered connected device(s).
5. Click '**Capture**' to capture the fingerprint.
6. Click '**Submit**' after successfully capturing the fingerprint to eSign and Send.

Note:

- Sender Name and Post details shall be appended in Green Note of File automatically after movement.
- Entry of File Sending shall be updated in File Sent list of User and Movement details of File.
- User will be able to see the Electronic signatures embossed on the note sheet.
- By clicking on Signature user will be able to view complete details of Signer.

Send file with DSC (Digital Signing Certificate)

This feature allows user to digitally sign green note using DSC Token.

Important Points:

- ✓ File should be available in file inbox/inbox folder /created list.
- ✓ Physical files in Inbox must be in received state.
- ✓ JRE Version 1.8 or above appropriate as per OS must be installed in the client machine.
- ✓ DSC Signer Service must be installed in the client machine.
- ✓ User must have valid DSC certificates installed in the computer.
- ✓ User must be registered with DSC and DSC should be plugged in the client system.
- ✓ Compatible DSC installer should be present in computer.

STEPS TO FOLLOW:

Follow Steps 1 to 12 as in sending a file, then click eSign and Send.

1. Click DSC Sign & Send.
2. Enter the PIN for DSC.

Note:

- Sender Name and Post details shall be appended in Green Note of File automatically after movement.
- Entry of File Sending shall be updated in File Sent list of User and Movement details of File.
- User will be able to see the Electronic signatures embossed on the note sheet.
- By clicking on Signature user will be able to view complete details of Signer.

Sending File to External eOffice Instance

This feature allows user to forward Files to user in external eOffice Instance.

Important Points:

- ✓ File should be available in file inbox/inbox folder /created list.
- ✓ Physical files in Inbox must be in received state.
- ✓ External Instance must be registered with users eOffice Instance.
- ✓ Role_Instance_Sender must be assigned to User sending file to external Instance.
- ✓ Role_Instance_Receiver must be assigned to user of external eOffice Instance to whom file is to be sent.
- ✓ External eOffice Instance should be active at time of Inter Instance file movement.
- ✓ The eFile(s) to be exchanged must not have-
  - Yellow Noting
  - KMS References.
  - File(s)/Receipt(s) as attachments.
  - Linked Files

STEPS TO FOLLOW:

1. Select file(s) or Click a file number in Inbox/Inbox Folder/Created list.
2. Click **Send** menu.
3. Select **External** Radio Button on File Send Page.

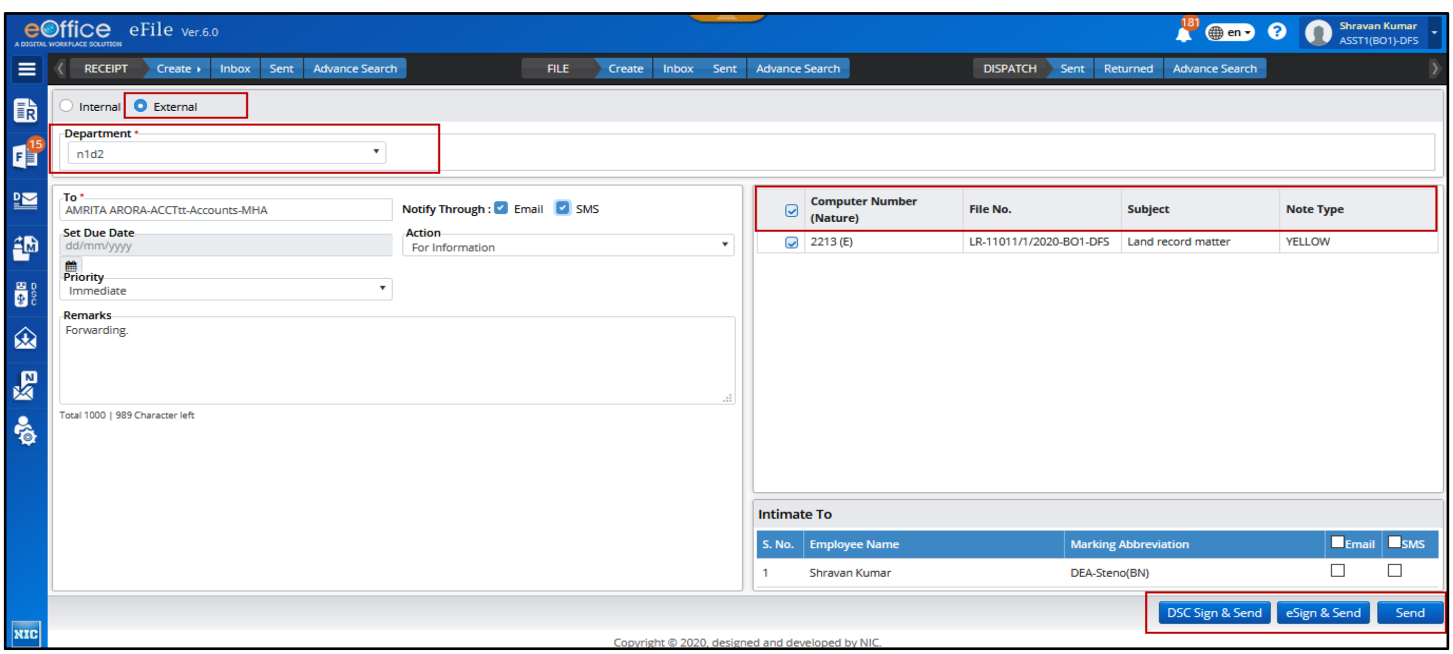


Figure 280

4. Select **Department** name (From Registered External eOffice Instance) using Combo-box.
5. Select user in **To** field (Employee List having Role_Instance_Receiver should be available)
6. Select **Action**
7. Select Priority
8. Enter Remarks
9. Click eSign and Send/ DSC Sign and Send/Send.

Note:

- **Sender Name, Post and Department** details shall be appended in Green Note of File automatically after movement.
- Entry of File Sending shall be updated in File Sent list of User and Movement details of File.
- **Local References, Issues & Correspondences** lying in a file will be exchanged.
- Internal file movements detail will not be exchanged; however, the last movement (i.e. from sender eOffice Instance to receiver eOffice Instance) of the file will be exchanged & will be visible in the Movements of the eFile(s) being exchanged.
- Main file, Part File(s)/Volume File(s) can be exchanged during the Inter Instance File Exchange.
- User will not be able to "Merge" physical files with an external physical file.
- No actions will be allowed on the attached records i.e. Correspondences, Issues and Local References in the eFile(s) of the sender department by the recipient department.
- External Physical file will not be allowed to "**Convert**" into electronic file.
- User should not able to "**Edit**" external file.
- User should not able to "**Close**" external file.
- Separate Computer No. for the sent file should be assigned in external eOffice Instance.
- Creation of Part/Volume of the external files will not be allowed.
- File(s) cannot be pulled back once sent to external eOffice. (Alert message will be displayed before sending of file)
- File(s) with DFA will be allowed for exchange with following conditions:
  - **Latest version** of the draft should be exchanged with the receiver eOffice Instance.
  - Receiver eOffice Instance can **Approve** the submitted DFA received from external eOffice Instance.
  - Receiver eOffice Instance will not be allowed to perform the signing of the submitted approved draft received from external eOffice Instance.
  - Receiver eOffice Instance will not be allowed to perform the final dispatch of the DFA submitted by another eOffice Instance. Approved DFA has to be send back to the sender eOffice Instance for final dispatch.
  - Draft content will be available for viewing/editing.
  - Draft metadata will be available only for viewing.
  - Draft attachments will be available only for viewing.

File Sent List

The **Sent** box displays the list of Files (**Electronic** and **Physical**) sent/forwarded by the user to other users in the system. It keeps a record of all the files sent so far and other details such as the date and time on which it was forwarded, the person to whom it was forwarded along with remarks etc. if any. May please refer below for more details –

To view list of receipts sent, Click **'Sent'** sub module under **File** module.

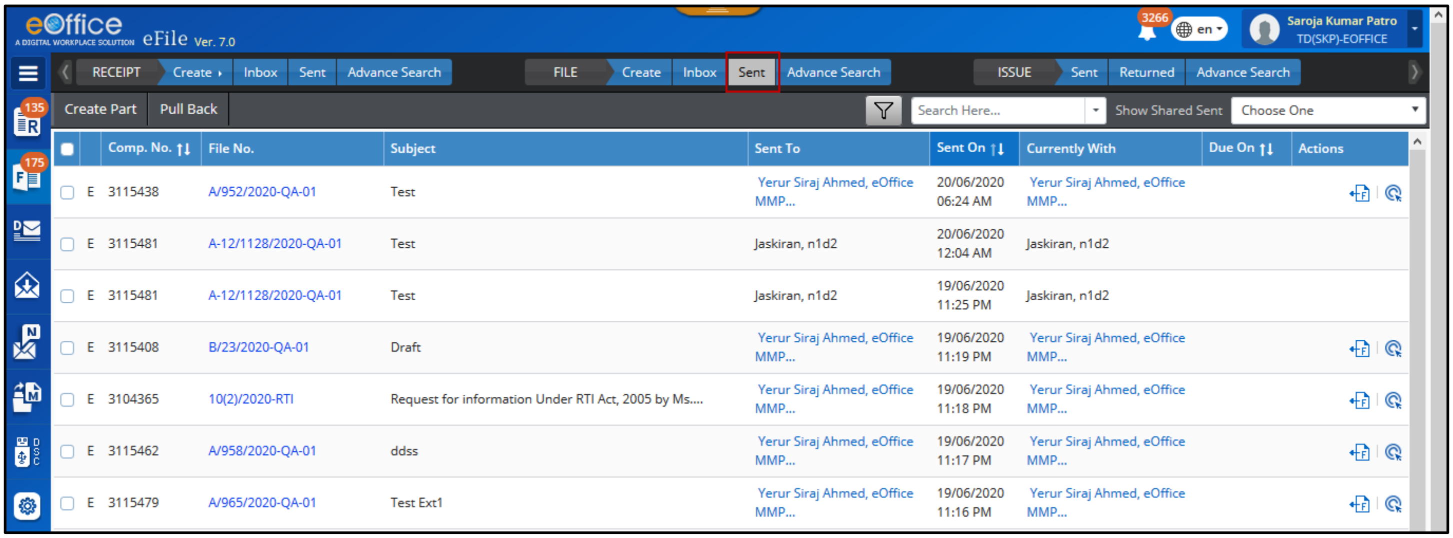


Figure 281

Description:

- The **Sent** list of File displays information such as, Nature of File (E/P), Computer No., File Number, Subject, Sent To, Sent On, Currently With, Due On and Actions.

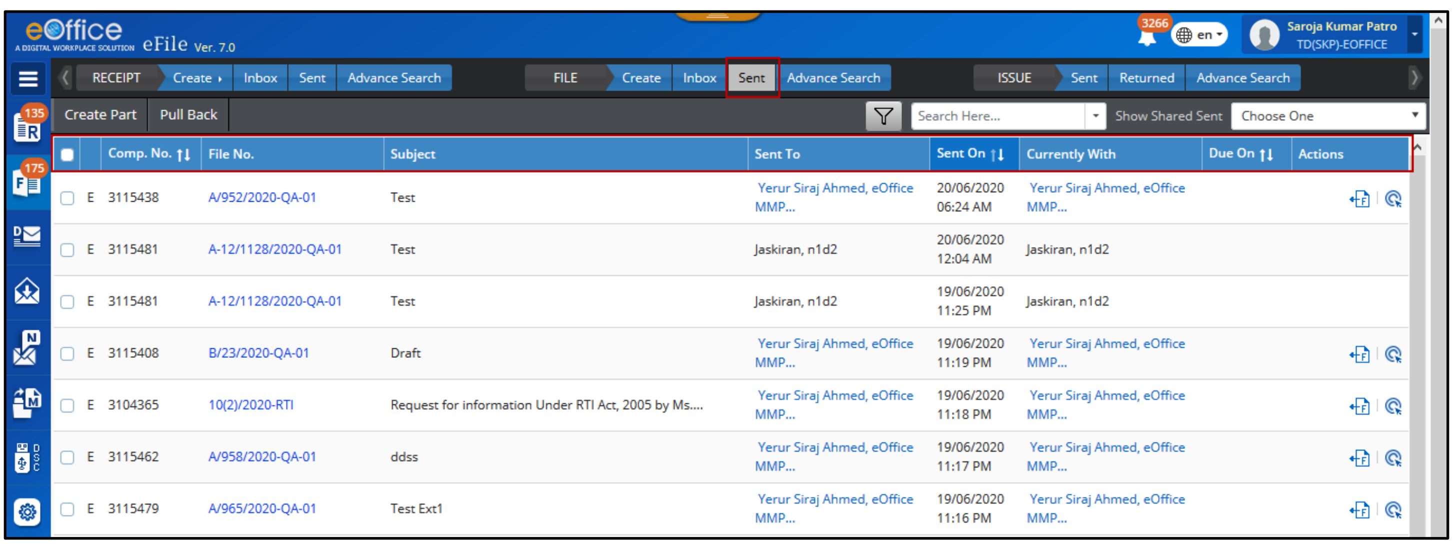


Figure 282

- The list of File can be sorted based on **Computer No.**, **Sent On** and **Created On** by clicking on column heads.

- The list of File can be **filtered** on the basis of **Nature**, **Subject Category**, **Sent Date** and **Due Date** range by clicking Filter Icon in menu bar.

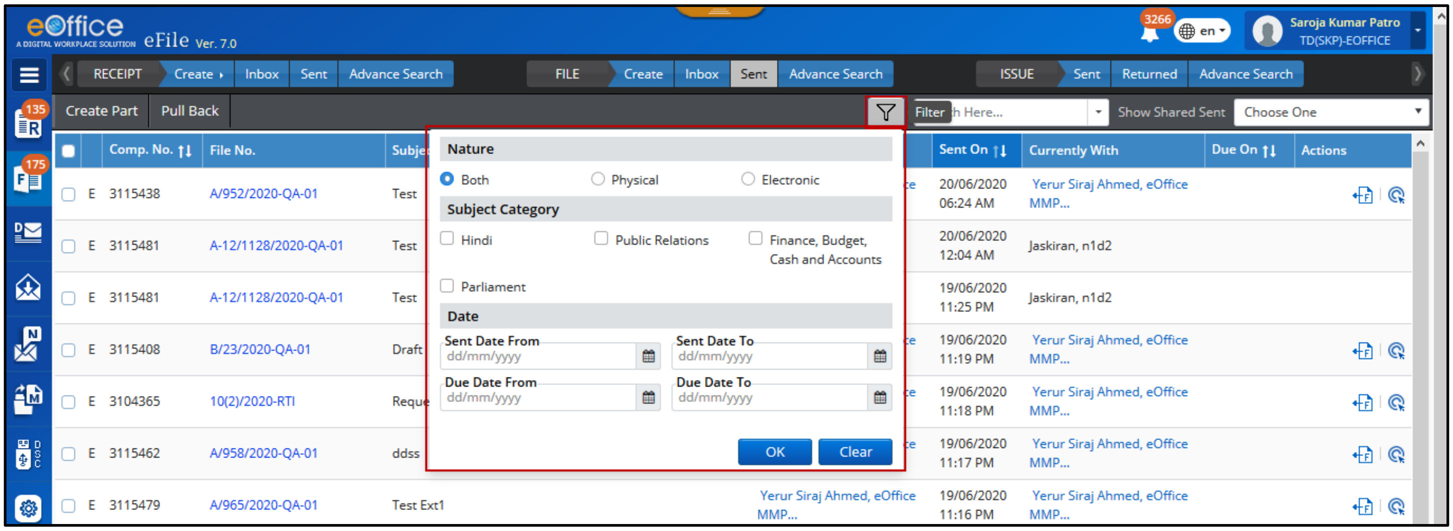


Figure 283

- The Files can be searched using Module Search on the basis of **Computer No.**, **File No.**, **Subject**, **Sent To** and **Currently With** by entering at least 3 characters.

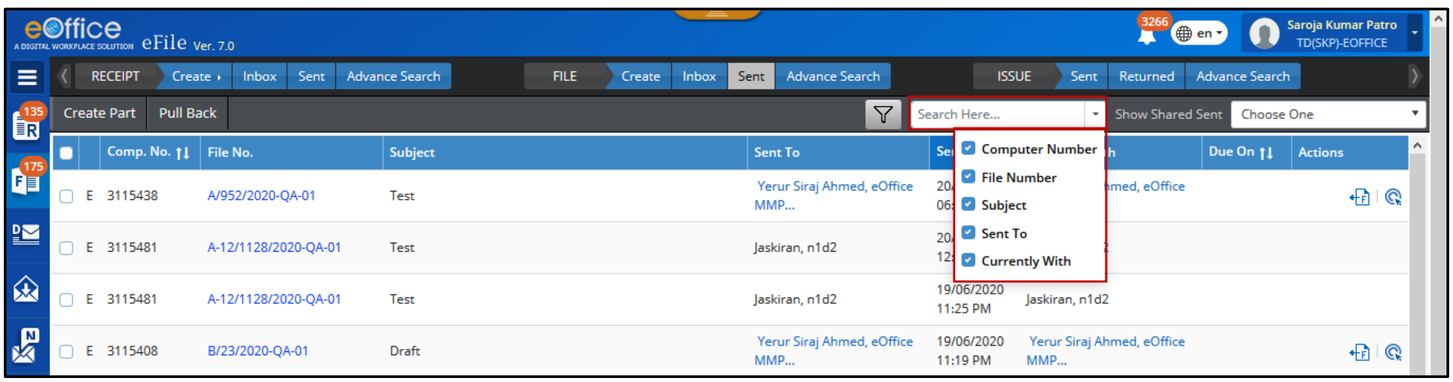


Figure 284

- The list of already sent files of **other users** if shared with you (in case of employee's handover due to transfer/superannuation/promotion) can be viewed through **Show shared Sent**.

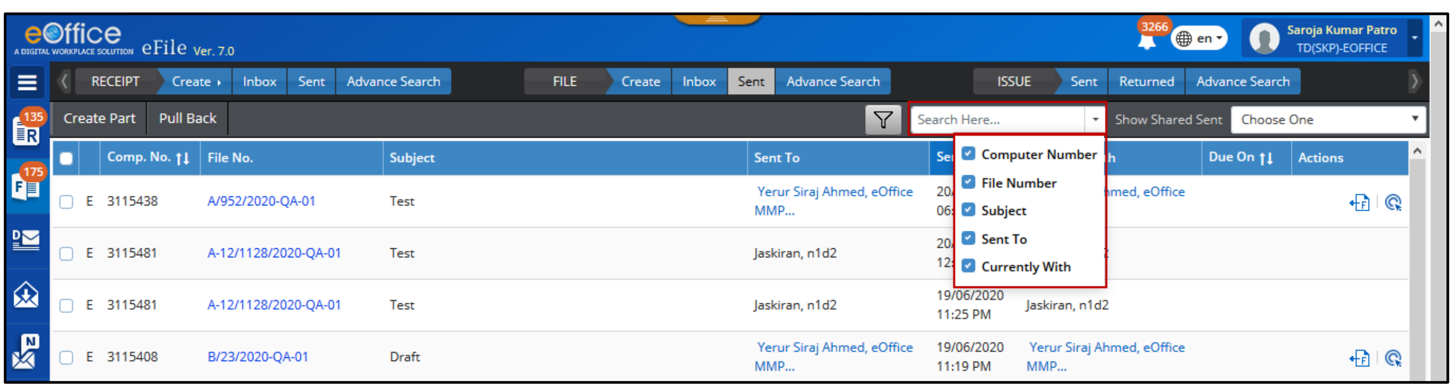


Figure 285

- The following actions that can be performed on the list of Sent Files –
  - **Create Part**
  - **Pull Back**
  - **Initiate Action**

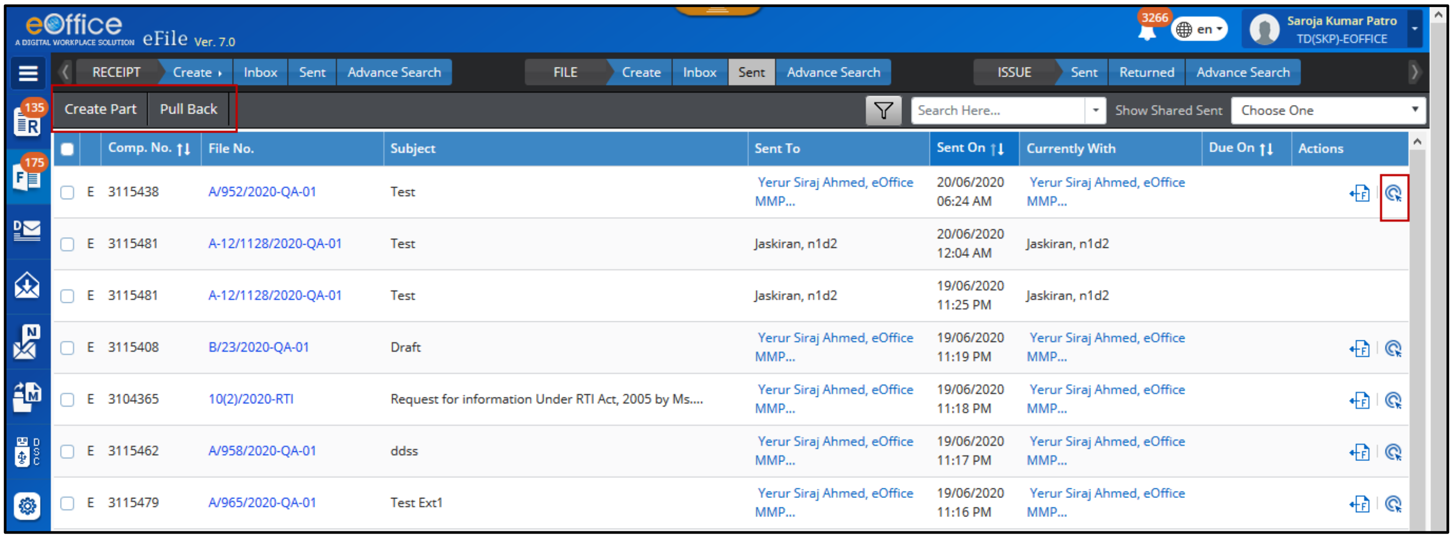


Figure 286

- Further, more details on a File can be viewed on File Inner Page by clicking on the **File No**.

File Pull Back

This feature allows user to '**Pull Back**' forwarded file from the user to whom it was marked. This may be required in case-scenarios where user forwards the file to an unintended person mistakenly, or the person is un-available so the subject matter (file) may be pulled back and re-assigned to someone else. This can only be done until the recipient has received or opened the receipt. This section describes the steps to pull back a receipt.

Important Points:

- ✓ Entry of File must be available in sent list with Pull Back link.
- ✓ File to be pulled back must not be in received (for physical File) or read (electronic File) condition in inbox of recipient.
- ✓ File to be pulled back must not be attached with other File/Receipt in Recipient eFile account.
- ✓ Pull Back link/icon must be available for only those file which are eligible for Pull Back.

STEPS TO FOLLOW:

From File Sent List

1. Click **Pull Back** icon with respect to file to be pulled or Select Files with Pull back Icon and click **Pull Back Menu** in File Sent list.

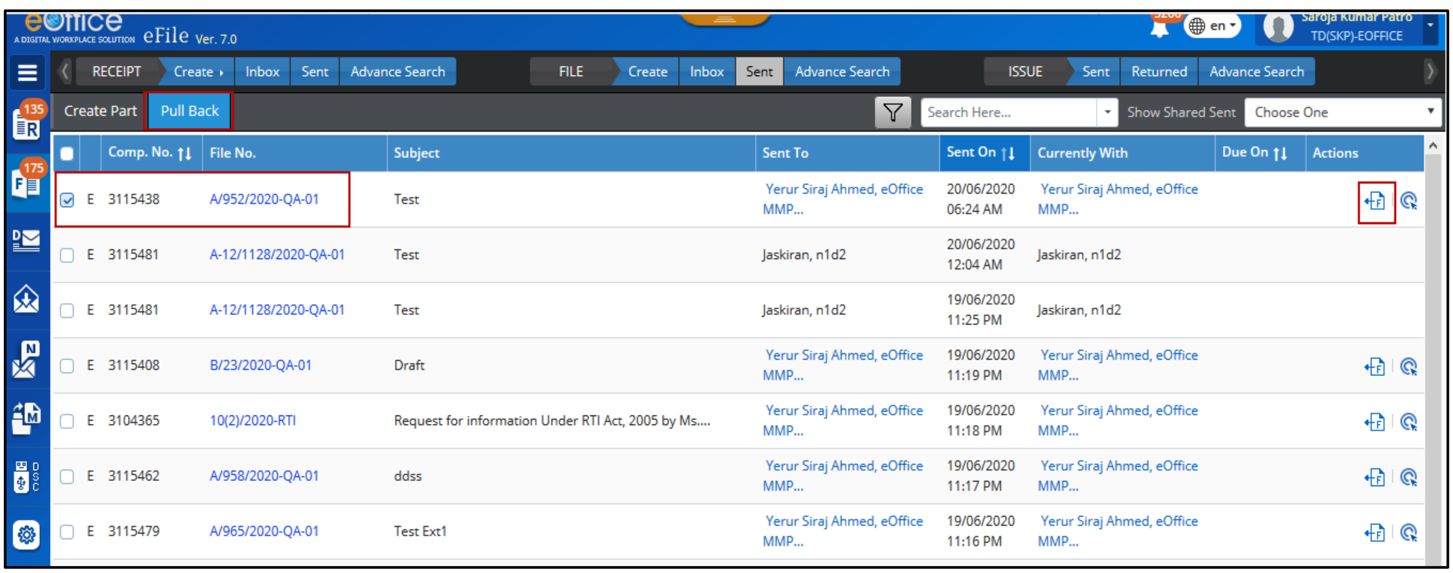


Figure 287

2. Enter **Pull Back remarks** and click **OK** in the Pull Back Confirmation pop up to pull back the selected File.

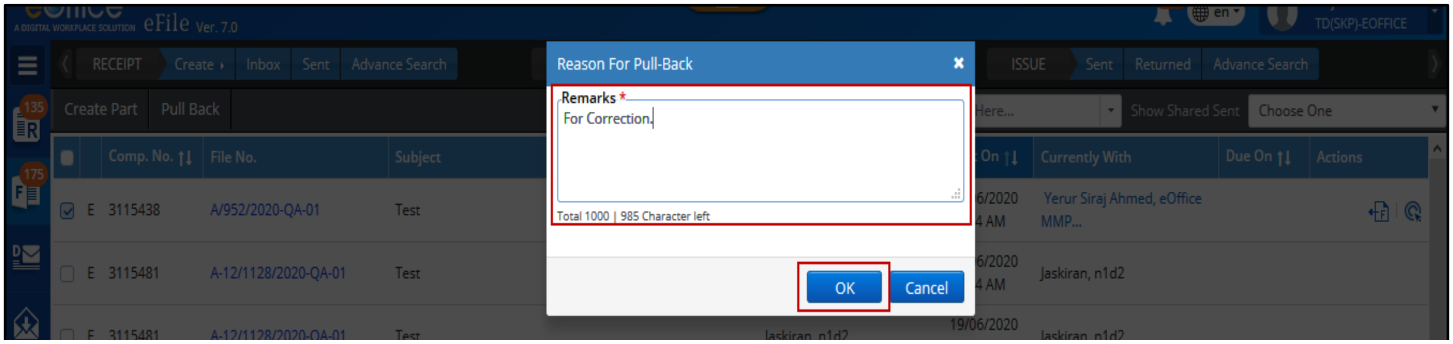


Figure 288

From Advance Search Output List

1. Click **Pull Back action menu/link** available in searched output record of Advance Search.

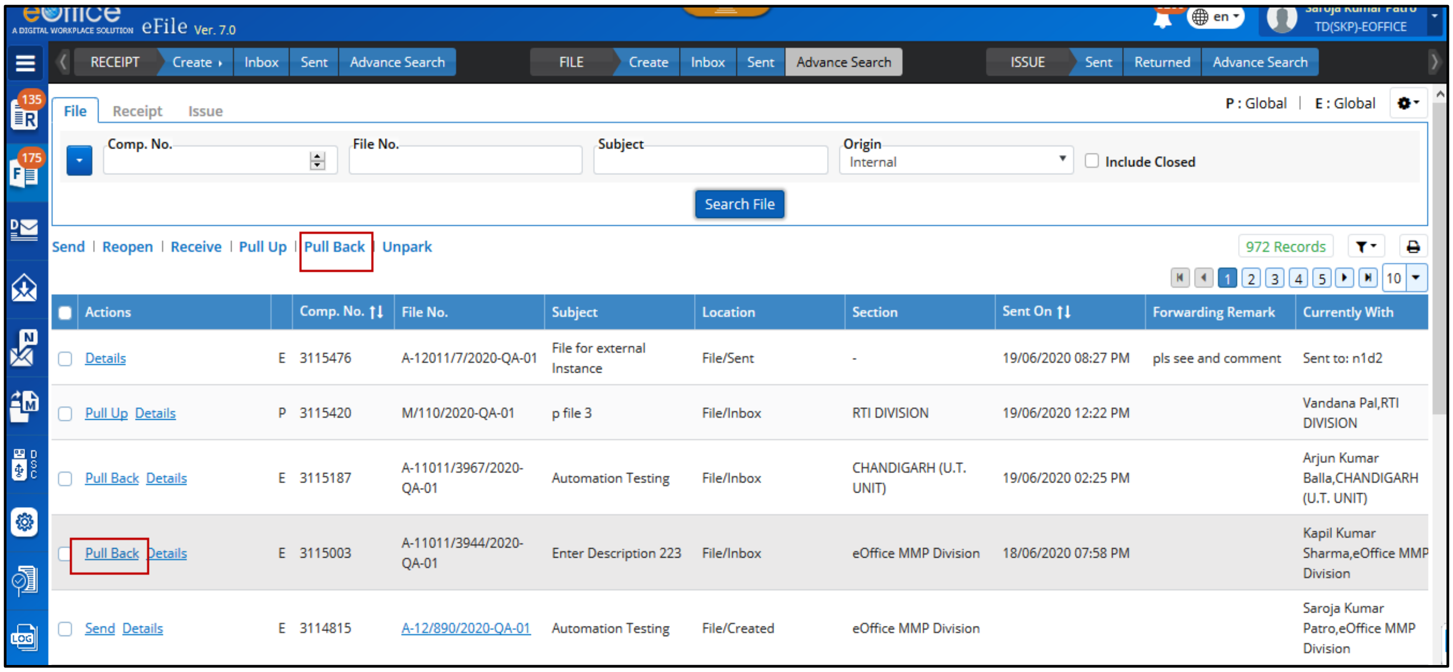


Figure 289

2. Enter **Pull Back remarks** and click **OK** in the Pull Back Confirmation pop up to pull back the selected File.

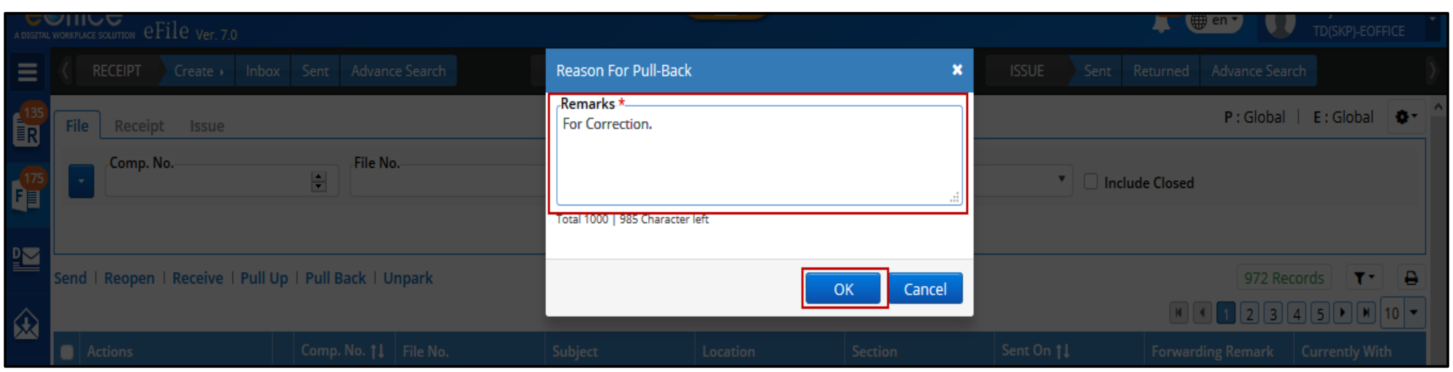


Figure 290

Note:

- Files forwarded from Inbox/Created should be placed in respective folder once Pulled Back.
- Files forwarded from Inbox Folder should be placed in Inbox Folder (*if available*) else in Inbox (*If inbox folder is deleted*) once pulled back
- File should be removed from the inbox of user from whom it was pulled back.
- Record of pulled back receipt should be removed from sent list.
- Pull back remarks should be maintained in the movement history of the pulled back File.

Create Part File

This feature allows user to create Part File of Main file whenever required.

Important Points:

- ✓ Entry of files (Physical/Electronic) must be available in Sent/Inbox /Inbox Folder/ Created Files list.
- ✓ The files selected in Sent List should not be present in Closed Files list of any user.
- ✓ Only users of **Dealing Section** can create the part file of the main file.
- ✓ Creation of Part file of only main (Physical/Electronic) File is allowed.

STEPS TO FOLLOW:

Create Part from File Module

1. Click '**Create Part**' link under **Files module** to display part file creation page.

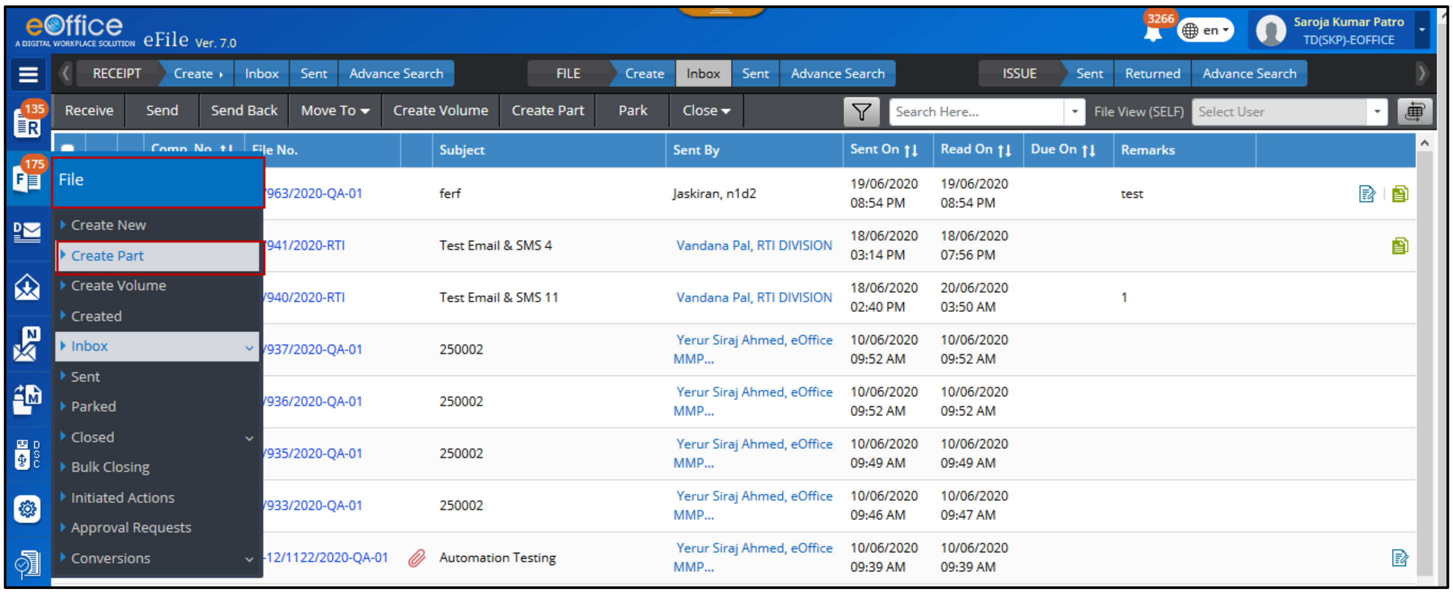


Figure 291

2. Click '**Choose File**' to view the list of Sent/Inbox/ Inbox Folder/ Created Files with year wise sorting in popup window.

Figure 292

3. Select File and click **Submit** button.

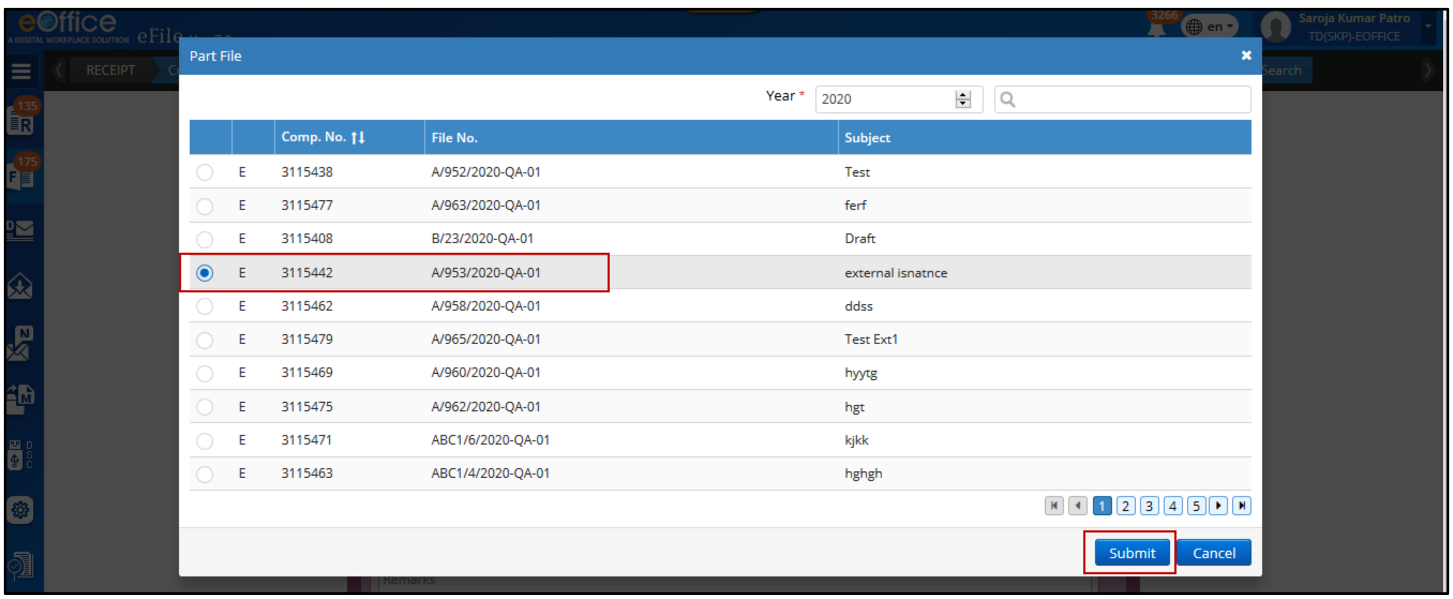


Figure 293

4. Edit metadata if necessary and click **Create Part** button to create part file.

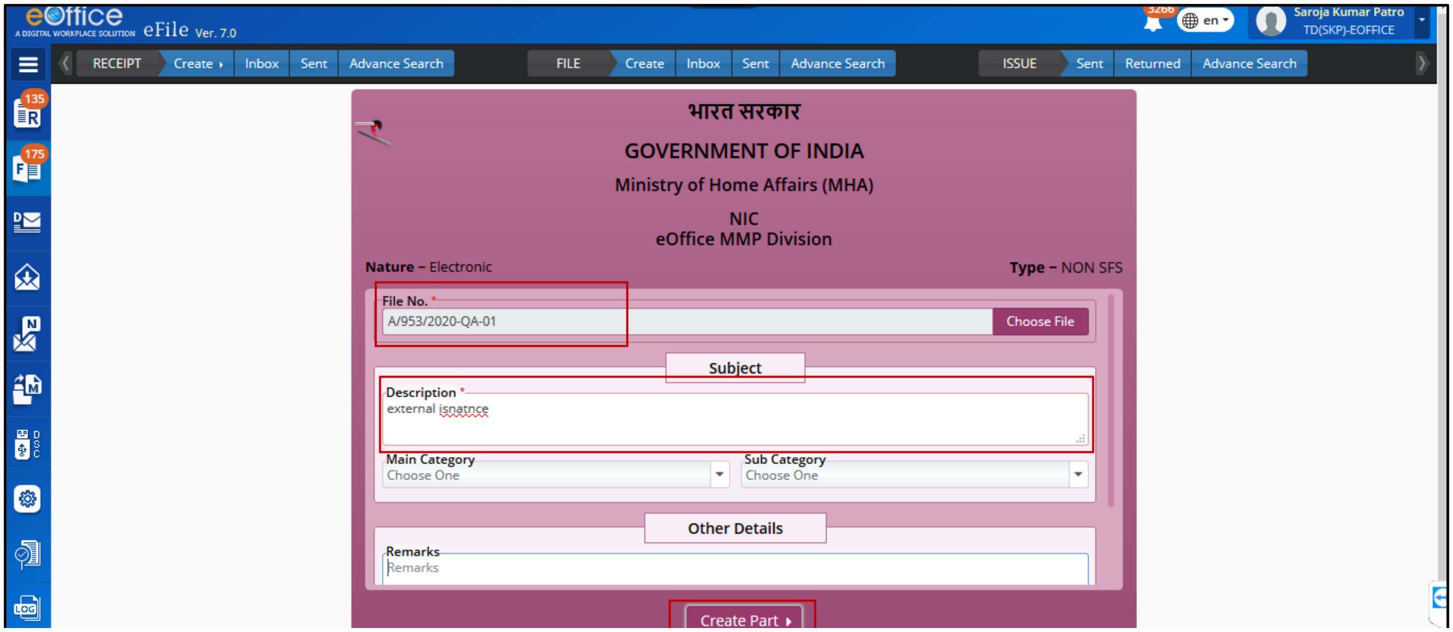


Figure 294

Create Part from Inbox/Inbox Folder/Created and Sent list

1. Select a file in the **Sent/Inbox/Inbox Folder/Created** file list and click **Create Part** menu.

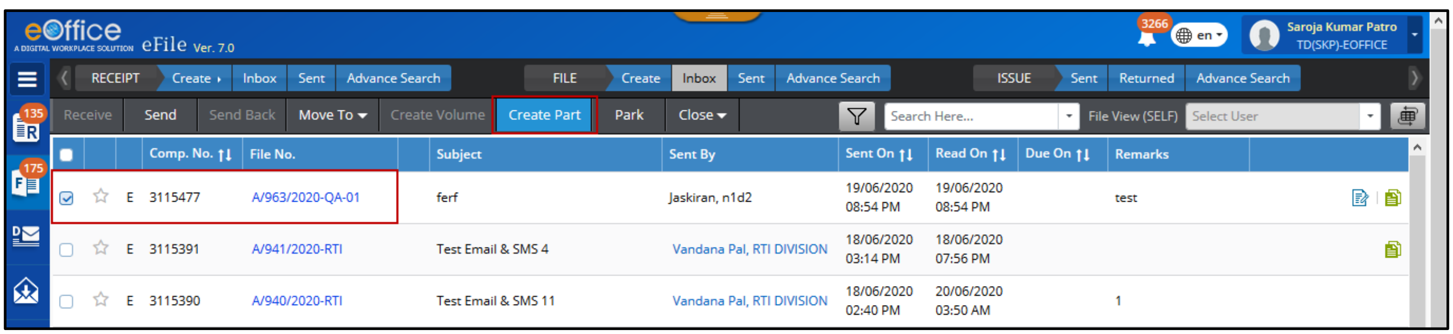


Figure 295

2. Edit metadata if necessary in the part file creation page.

Figure 296

3. Click **Create Part** button to create the part file.

Create Part from File Inner Page

1. Click open a file from Sent/Inbox/Inbox Folder/Created file list and click **Create Part** sub menu under '**More**' menu in the menu bar of File Inner Page.

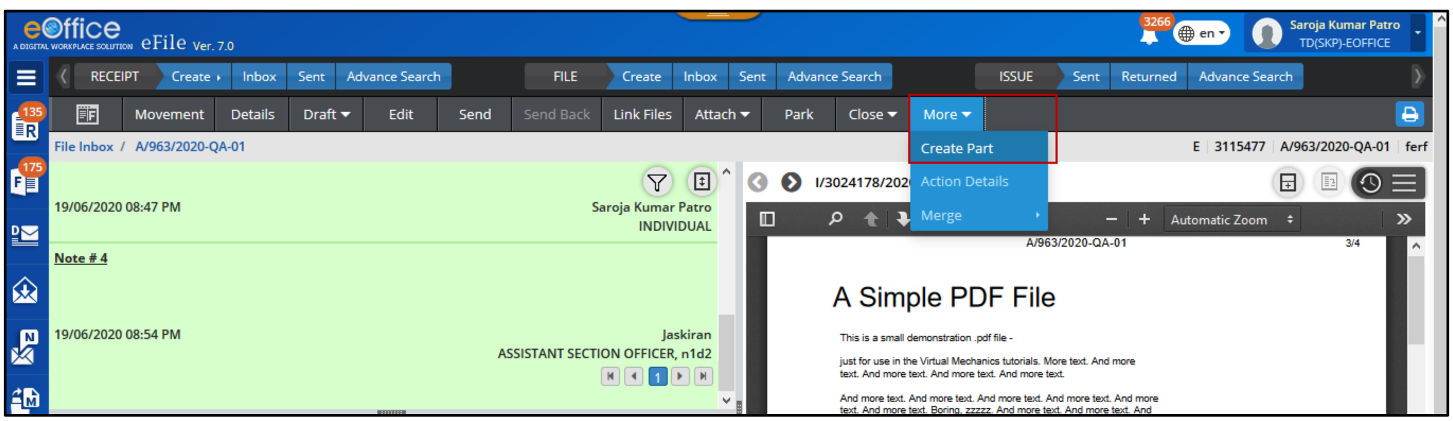


Figure 297

2. Fill necessary metadata in the part file creation page.
3. Click "**Create Part**" button to create the part file.

Note:

- Created part file will be listed in Created Files list under file module with (**Part <Part Number>**) appended at the end of main file number whose part has been created.
- Part file history will be maintained in the main file under File Details information.

Create Volume File

This feature allows user to create Volume File of Main Physical file whenever required.

Important Points:

- ✓ User must have **physical File** in **Inbox/Inbox Folder/Created** list.
- ✓ Physical file must be in received state.
- ✓ Only users of **Dealing Section** can create the volume of the main file.
- ✓ Creation of Volume file of only main (Physical) file is allowed.

STEPS TO FOLLOW:

Create Volume from File Module

1. Click **Create Volume** link under Files module to display Volume File Creation page.

Figure 298

2. Click **Choose File** to view the list of Inbox/Inbox Folder and Created Physical Files listed with year wise sorting in popup window.
3. Select File and click **Submit** button.

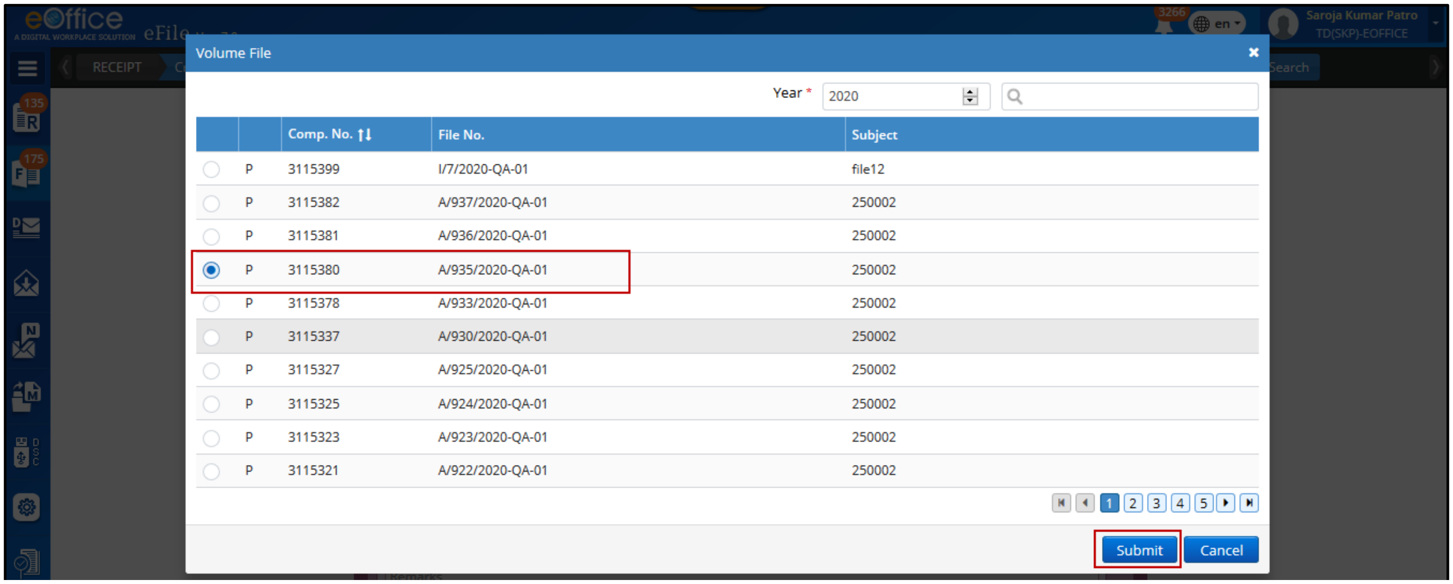


Figure 299

4. Edit metadata if necessary and click **Create Volume** button to create volume file.

Figure 300

Create Volume File from Inbox/Inbox Folder/Created

1. Select a physical file in Inbox/Inbox Folder/Created Files list and Click **Create Volume** menu in the menu bar.

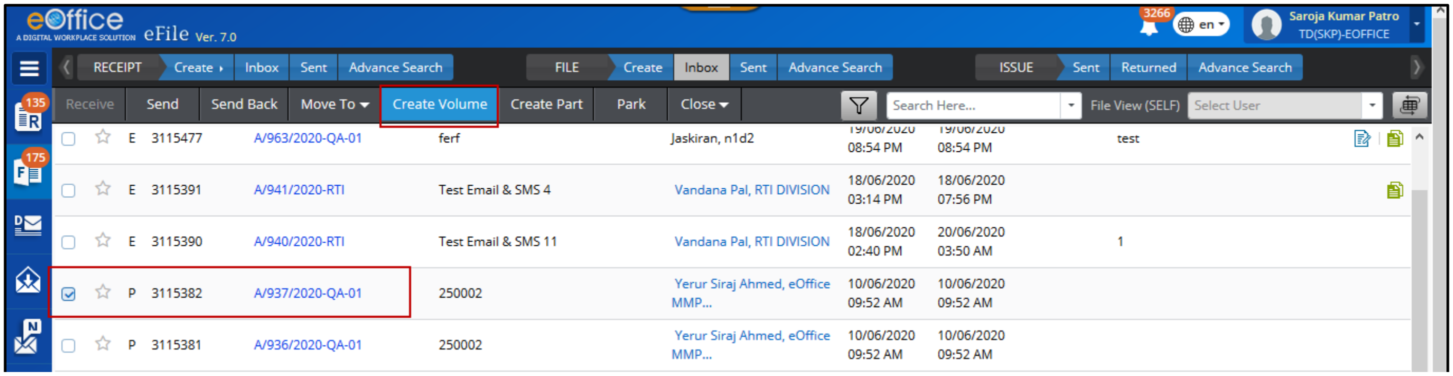


Figure 301

2. Edit metadata if necessary in the Volume File creation page.
3. Click **Create Volume** button to create the volume file.

Figure 302

Create Volume from Physical File Inner Page

1. Click open physical file from Inbox/Inbox Folder/Created Files list and click **Create Volume** sub menu under '**More**' menu in the menu bar of File Inner Page.

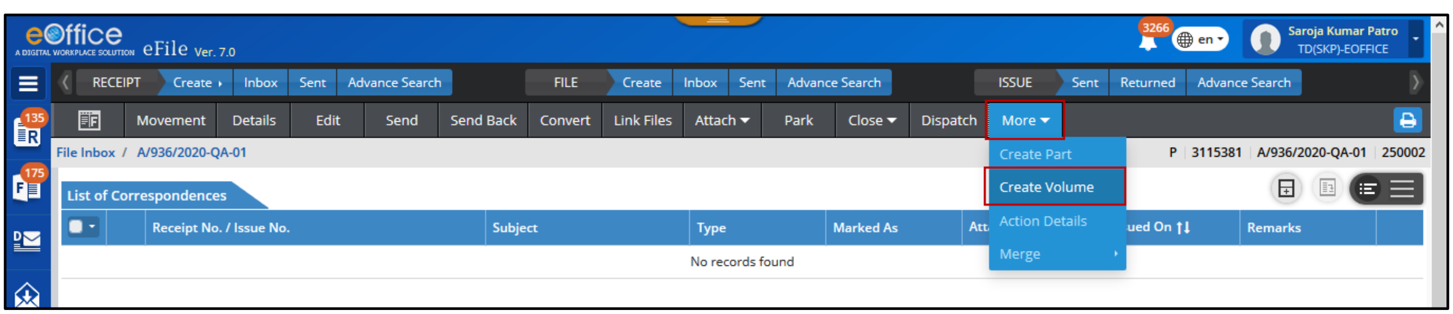


Figure 303

2. Edit metadata if necessary in the Volume File creation page.

3. Click **Create Volume** button to create the volume file.

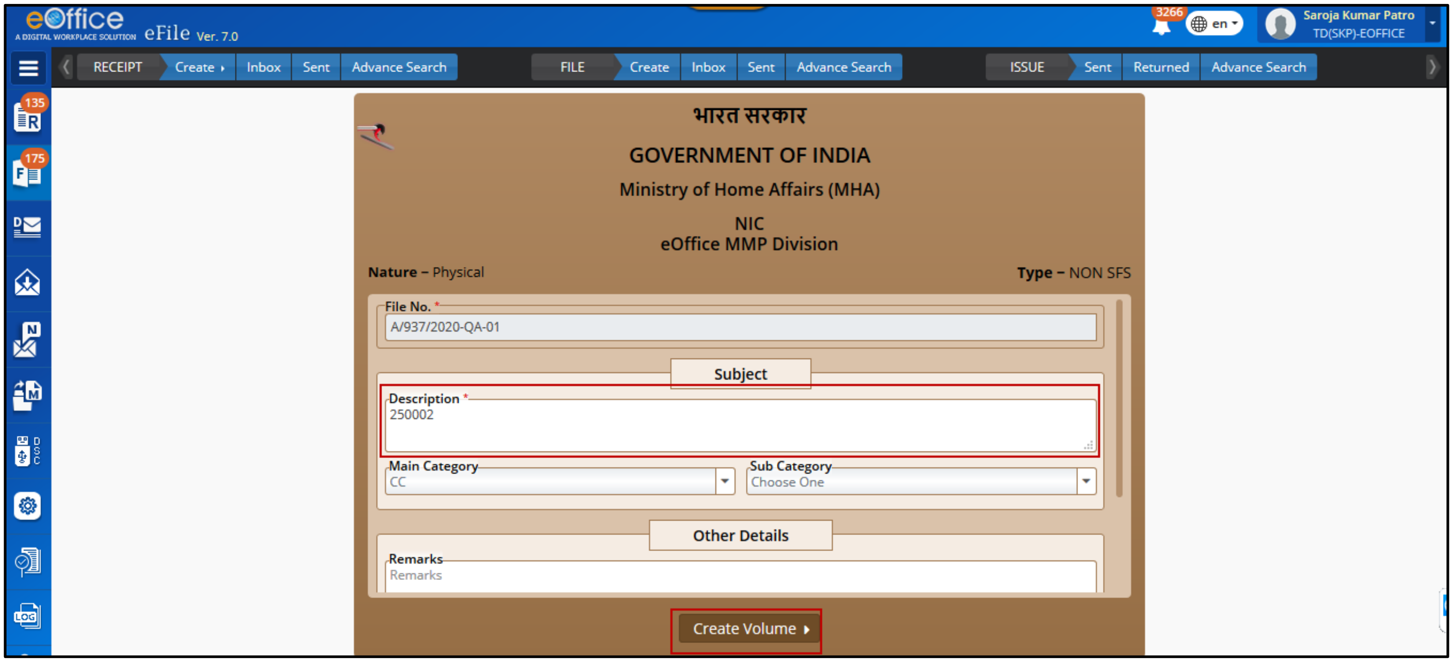


Figure 304

Note:

- Created volume file will be reflected in Created Files list under file module with (**Volume <Volume Number>**) appended at the end of main file number whose volume has been created.
- Volume file history should be maintained in the main file under File Details information

Closing of File

This Feature allows user to **Close** the File, if actions on File are completed. User will be able to Reopen closed file whenever required.

Direct Closing of File

This feature is Role Based. User with **Role Closing** and **Role Approver** can directly Close the File from Inbox/Inbox Folder/Created List.

Important Points:

- ✓ File must be in Inbox/Inbox Folder/Created List.
- ✓ File must be of same dealing section (that of logged in user) for direct closing.
- ✓ Physical Files must be in received state.
- ✓ Inbox files to be closed must not have any File/Receipt as attachment.
- ✓ Inbox files to be closed must not be received from another eFile instance.

Steps to Follow:

1. Select files in file Inbox /Inbox Folders/Created listing and click Close menu or Click open a File from Inbox /Inbox Folders/Created listing and click Close menu.

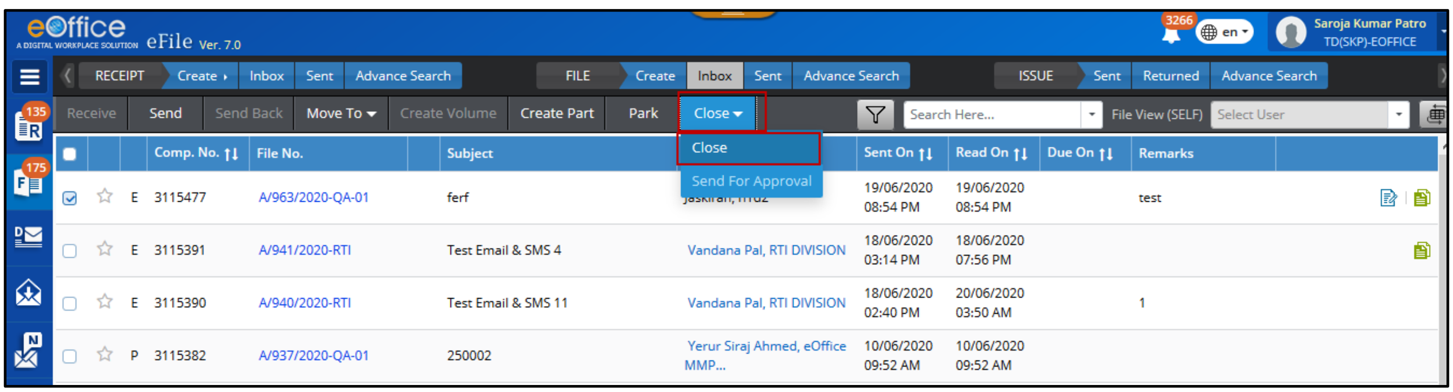


Figure 305

2. Enter **Closing Remarks** in the file closing confirmation pop up window.

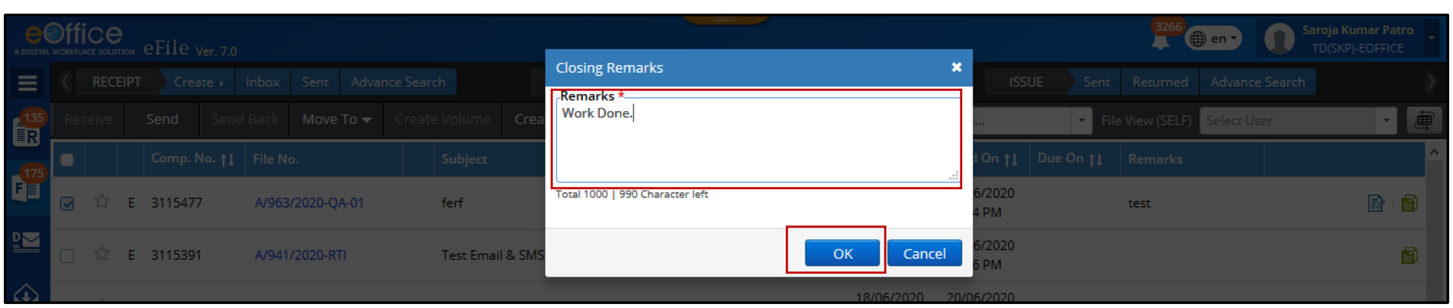


Figure 306

3. Click **OK** button to Close the File.

Note:

- Closed File will be removed from Inbox /Inbox Folders/Created list.
- Closed File will be displayed under **Closed (By Me)** list of Files module.
- All the receipts inside the file (as correspondence) will be closed.
- State of the file should be changed to CLOSED.
- Entry of Action, Action By, Action On, Action Remarks values should be displayed in File Closing History.
- No action will be allowed on the file once closed except viewing details of the file, and option to Re-Open the closed file from Closed (By Me) list.
- User will have the option to Record closed physical file from Closed (By Me) list (Configurable feature).

Send File for Closing Approval

User having only Role Closing can send File for Closing Approval. Once approval is granted user can close the File from Submitted File for closing approval list.

Important Points:

- ✓ File must be in Inbox/Inbox Folder.
- ✓ Files in Created Folder can be directly closed without any Approval.
- ✓ File must be of same dealing section (that of logged in user).
- ✓ Physical Files must be in received state.
- ✓ Inbox files to be closed must not have any File/Receipt as attachment.
- ✓ Inbox files to be closed must not be received from another eFile instance.

STEPS TO FOLLOW:

1. Select files in file Inbox /Inbox Folders/Created listing and click **Send For Approval** submenu under Close menu or Click open a File from Inbox /Inbox Folders/Created listing and click **Send For Approval** submenu under Close menu.

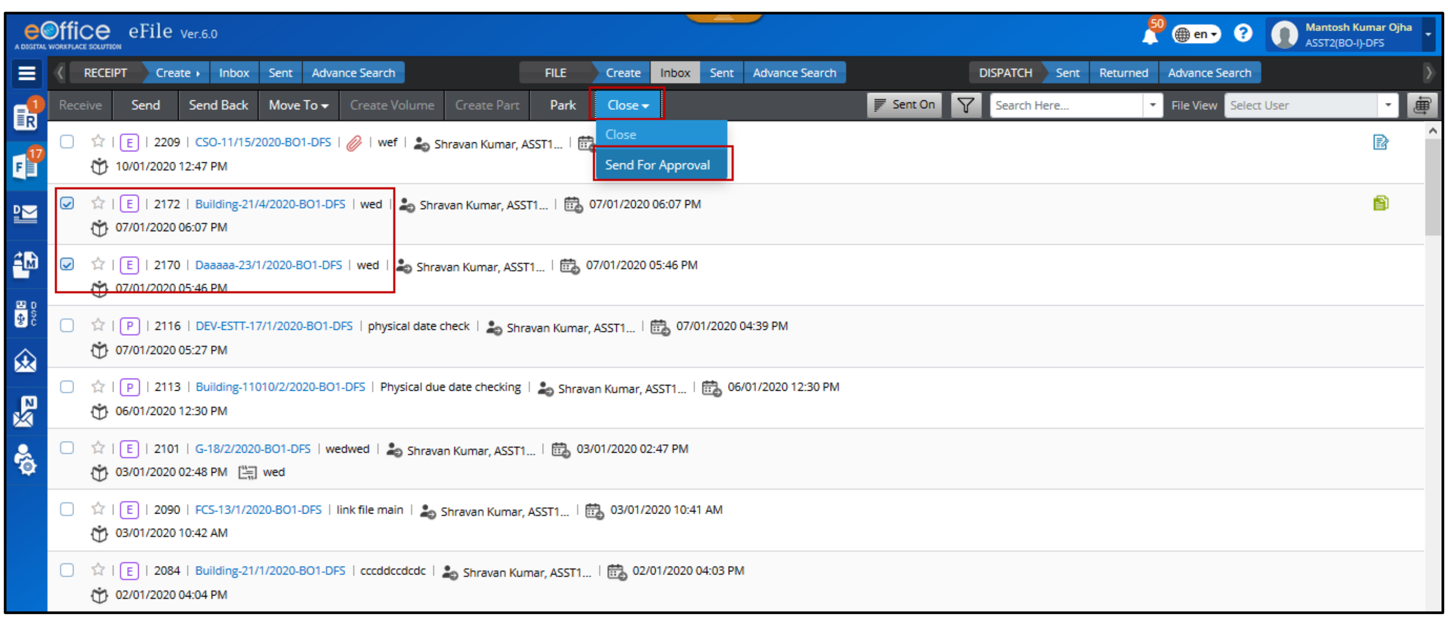


Figure 307

2. Enter approval-seeking remarks in the ‘Send File for Approval’ pop up window

3. Click **Send** button to Send Close Approval.

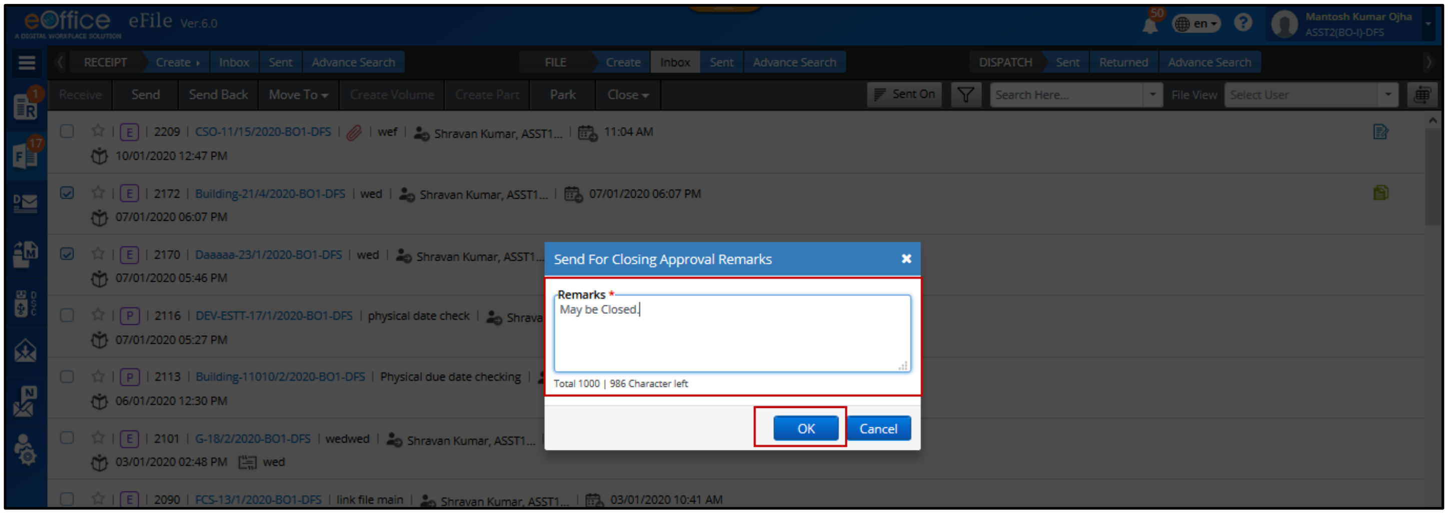


Figure 308

Note:

- File will be removed from inbox/inbox folder list and is displayed under Submitted Files for Closing Approval module with pending status.
- User will be able to take actions like ‘Close’, ‘Move to Inbox’, ‘Cancel’ for Approved, Rejected and Pending approval status respectively.
- User will be able to view list of approvers for that particular file by clicking on ‘View Approvers’ link.

Bulk Closing of File

This Feature allows user to Close Files in Bulk. User with Role Closing and Role Approver can Directly Close the File while User with only Role Closing can Send File for Closing Approval.

Important Points:

- ✓ Bulk Closing List will display Files in Inbox/Inbox Folder/Created list of Same Dealing section as of logged in User.
- ✓ Physical Files must be in received state.
- ✓ Inbox files to be closed must not have any File/Receipt as attachment.
- ✓ Inbox files to be closed must not be received from another eFile instance.

STEPS TO FOLLOW:

1. Click **Bulk Closing** link under Files module.

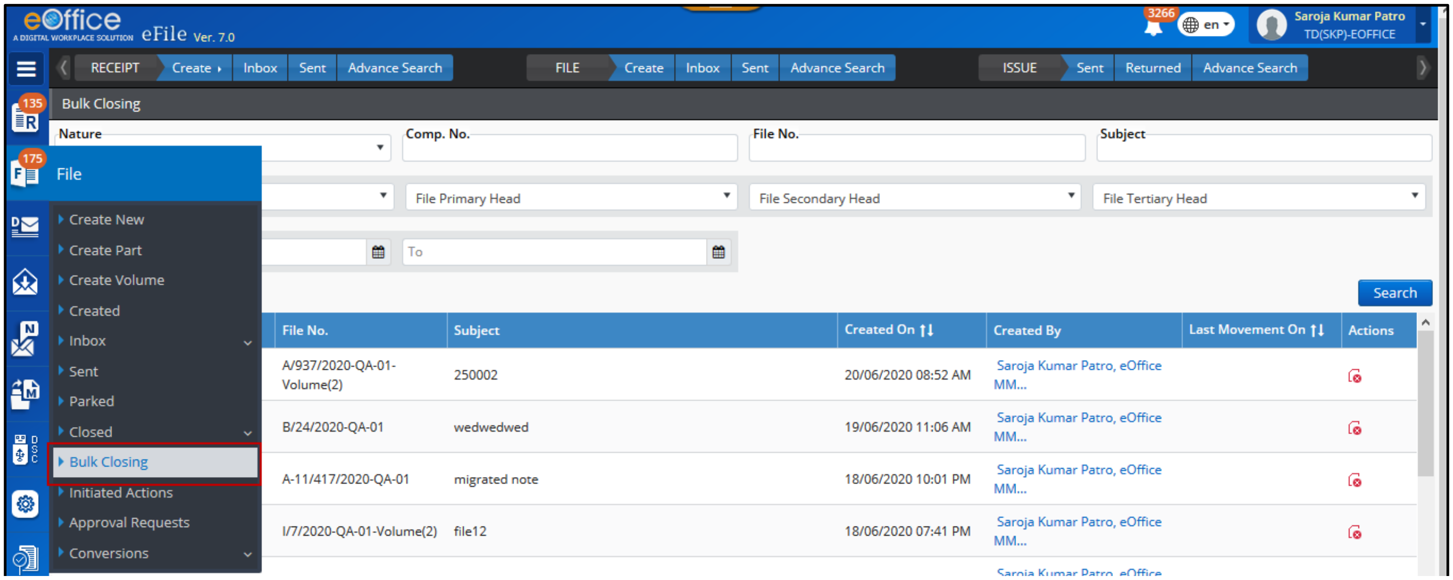


Figure 309

2. Search File using various search parameters. (*If Required*)
3. Select Files and Click **Close** Icon/Link. (*User with Role Approver*) or **Send For Approval** (*User with only Role Closing)*

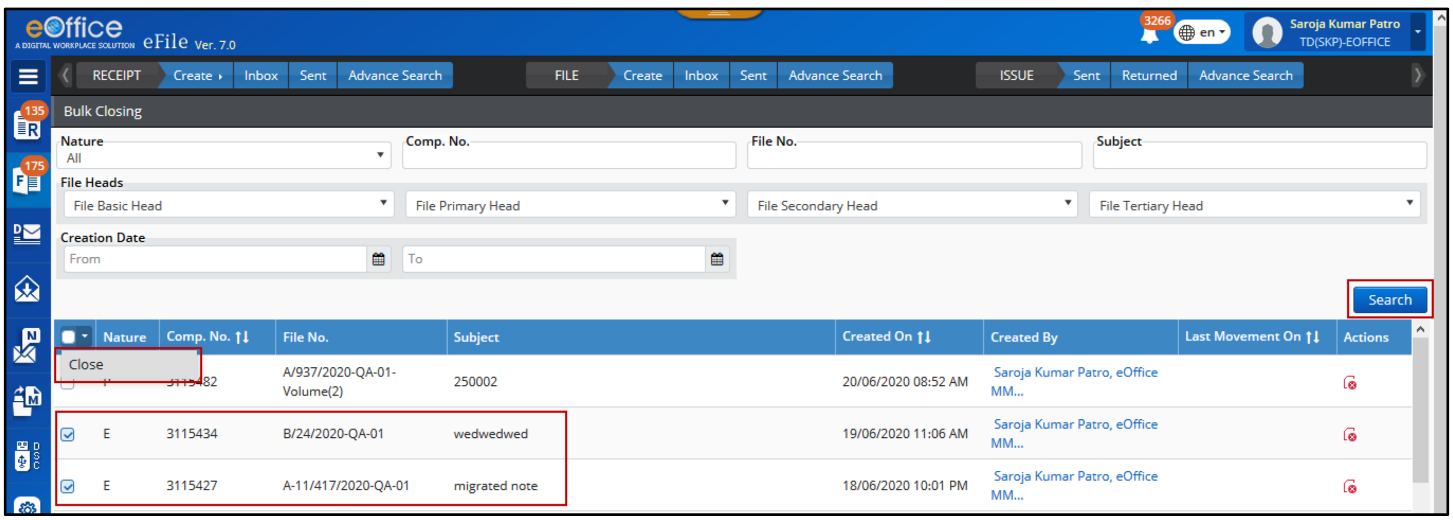


Figure 310

4. Enter Mandatory **Remarks** and click **OK** to close the selected files or Send File for Closing Approval.

Note:

- Closed File will be removed from Inbox /Inbox Folders/Created list.
- Closed File will be displayed under **Closed (By Me)** list of Files module.
- Files **Send for Closing Approval** will be displayed under **Submitted Files for Closing Approval** module with pending status.
- All the receipts inside the file (as correspondence) will be closed.
- State of the file should be changed to CLOSED.
- Entry of Action, Action By, Action On, Action Remarks values should be displayed in File Closing

History.

- No action will be allowed on the file once closed except viewing details of the file, and option to Re-Open the closed file from Closed (By Me) list.
- User will have the option to Record closed physical file from Closed (By Me) list (Configurable feature).

Submitted Files for Closing Approval

This feature allows the user to **View** the **Submitted Files for Closing Approval** list and take various actions like **'Close', 'Move to Inbox', 'Cancel'** for **Approved, Rejected and Pending** approval status respectively.

STEPS TO FOLLOW:

Click **Submitted Files for Closing Approval** Link Under **File→Inbox** Module to view list of files send for closing approval.

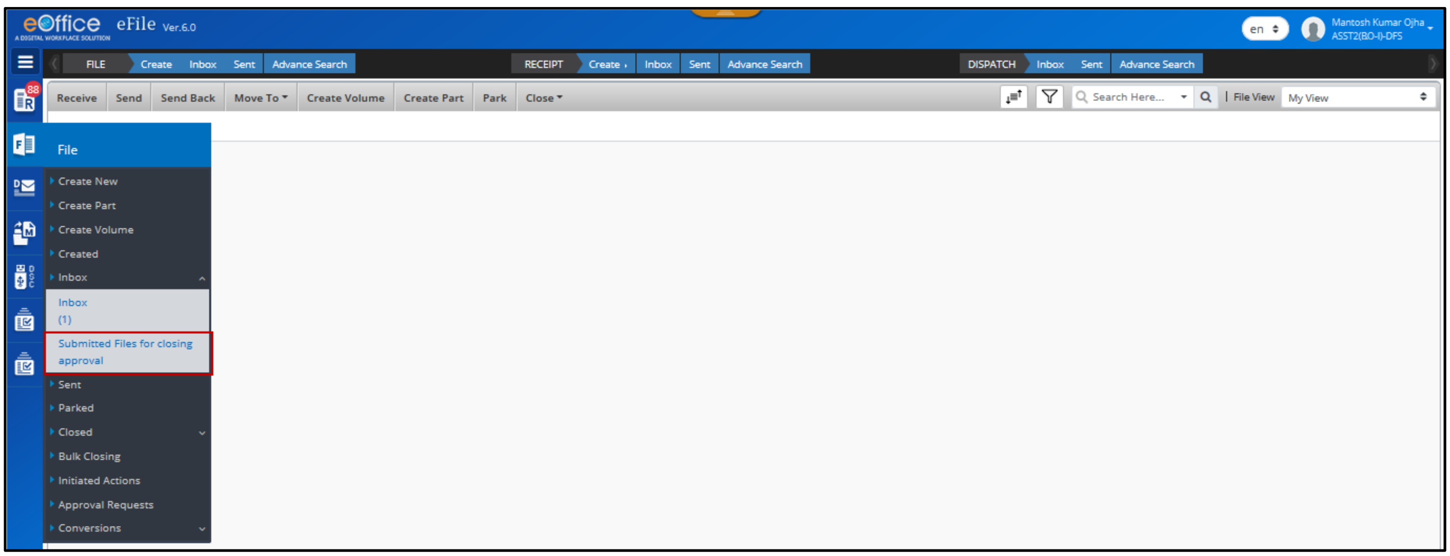


Figure 311

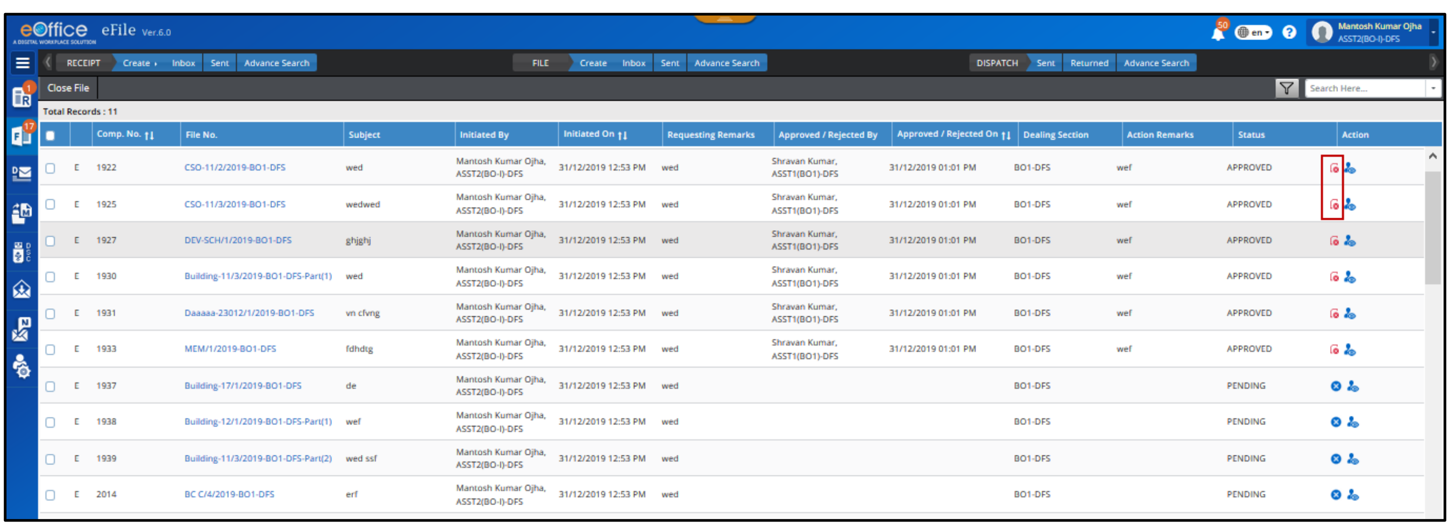


Figure 312

- **Submitted Files for Closing Approval** list can be **filtered** depending on **Nature, Approval Status, Initiation Date and Rejection Date** by clicking Filter Icon in menu bar.

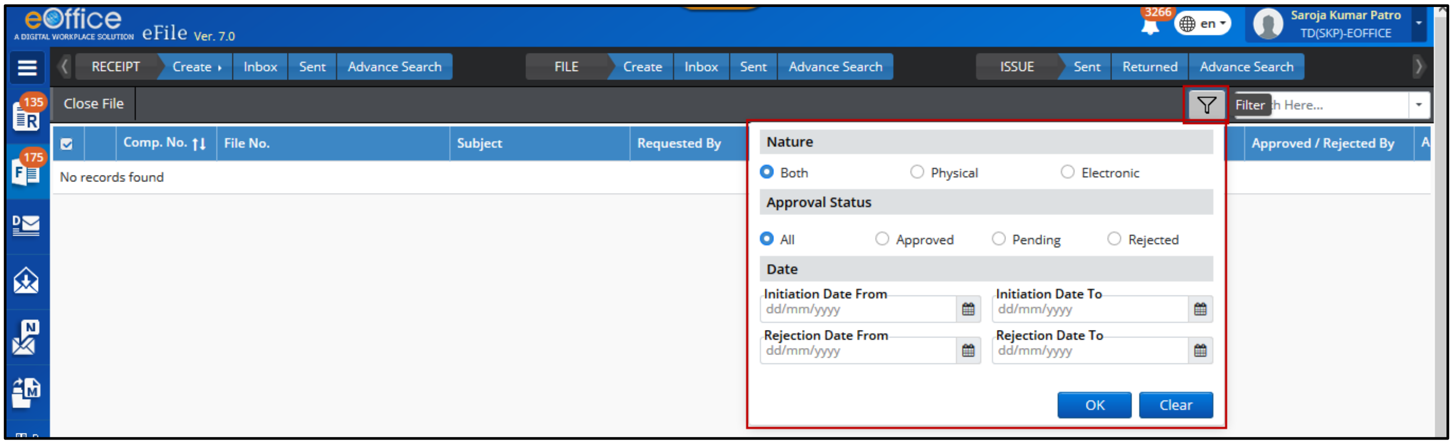


Figure 313

- File available in **Submitted Files for Closing Approval list** can be **Searched** using module search (Computer No., File No., Initiated By, Approved/Rejected By, Dealing Section, Requesting Remarks and Status).

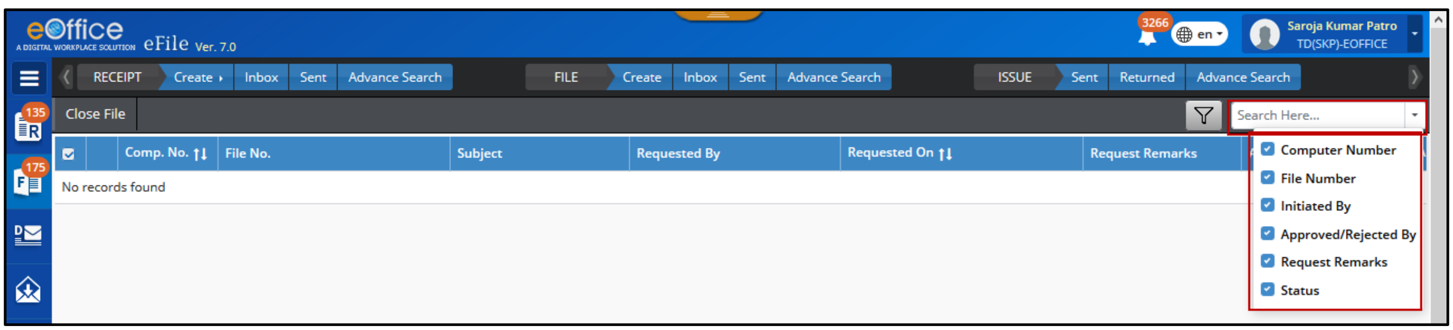


Figure 314

- Files with **Approved** Status can be **Closed** by clicking on **Close** Menu or Link.
- Files with **Rejected** Status can be moved to Inbox by clicking on **Move to Inbox** Link.
- Files with **Pending** Status can be **Cancelled** by clicking on **Cancel** Link.
- List of **Approvers** can be viewed for that particular file by clicking on '**View Approvers**' link.

List of Closed Files

This section describes the different lists available to check the receipts which are in closed state.

STEPS TO FOLLOW:

1. Click **Closed** sub module under **File** module.
2. Click **'By Me'** or **'By Others (Hierarchy)'** or **'By Others (All)'**, as required.

Closed (By Me):

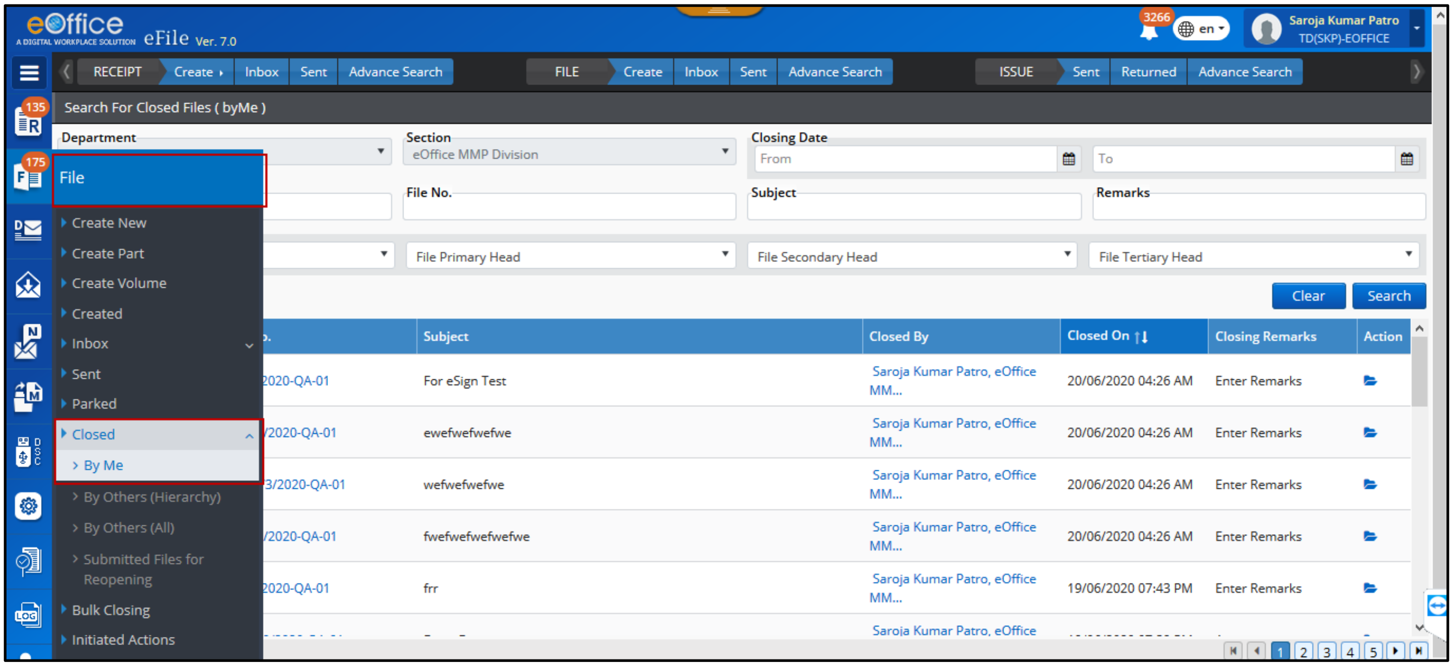


Figure 315

- It displays the list of Files closed by self.
- User will not be able to take any action on Files with closed state, except to View, Re-open/Send for Reopening Approval.
- Closed File List can be **filtered** with help of various search options such as **Closing date range, Computer No., File No**, **Subject**, **Remarks and File Heads**.

By Others (Hierarchy) –

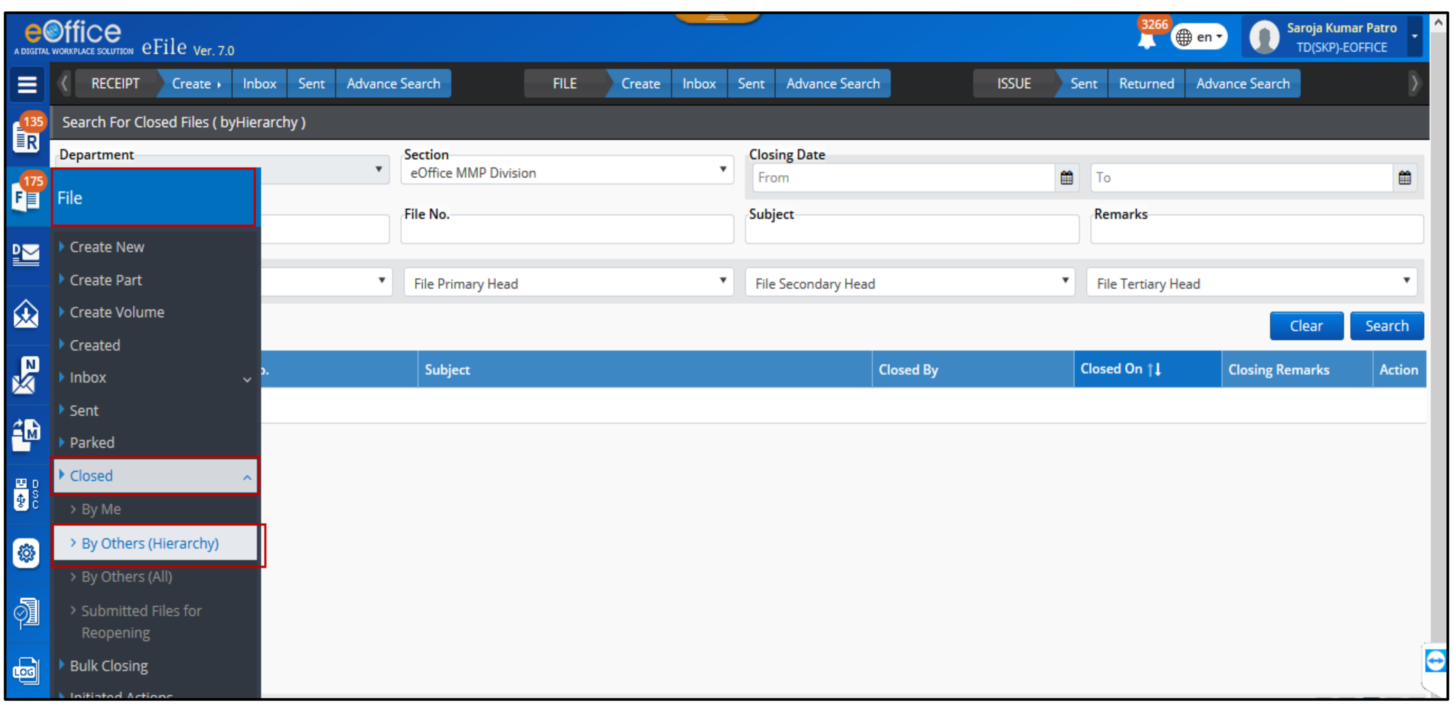


Figure 316

- It displays the list of Files closed by others users in the viewer's hierarchy down line.
- User will not be able to take any action on Files with closed state, except to view them.
- Closed File List can be **filtered** with help of various search options such as **Section, Closing date range, Computer No., File No**, **Subject**, **Remarks and File Heads**.

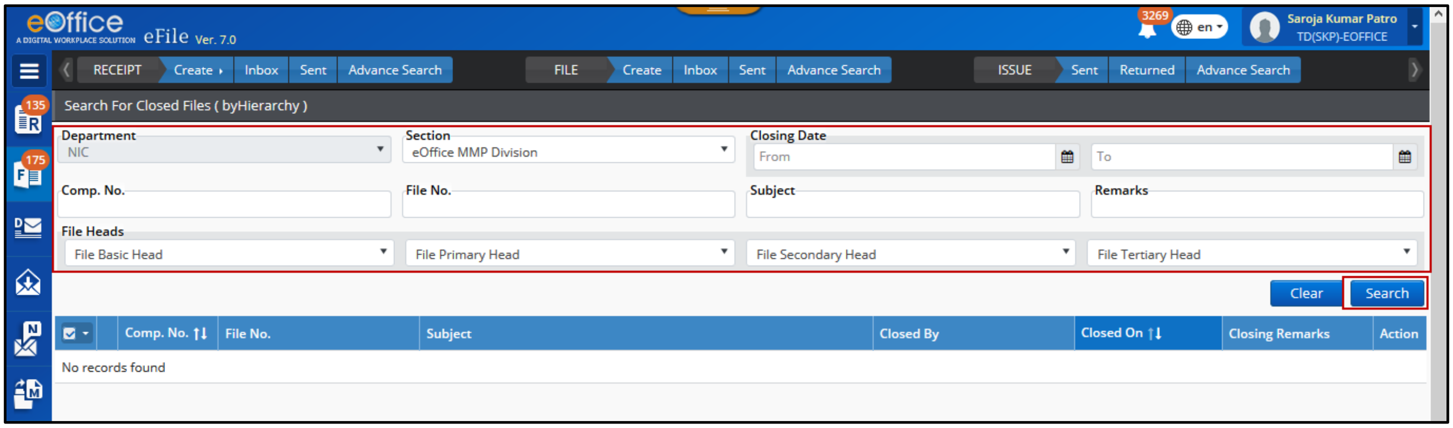


Figure 317

> **Note:**
>
> ▪ Users with role **'Role_ClosedByOthersHierarchy'** will only be able to see this list.

By Others (All)

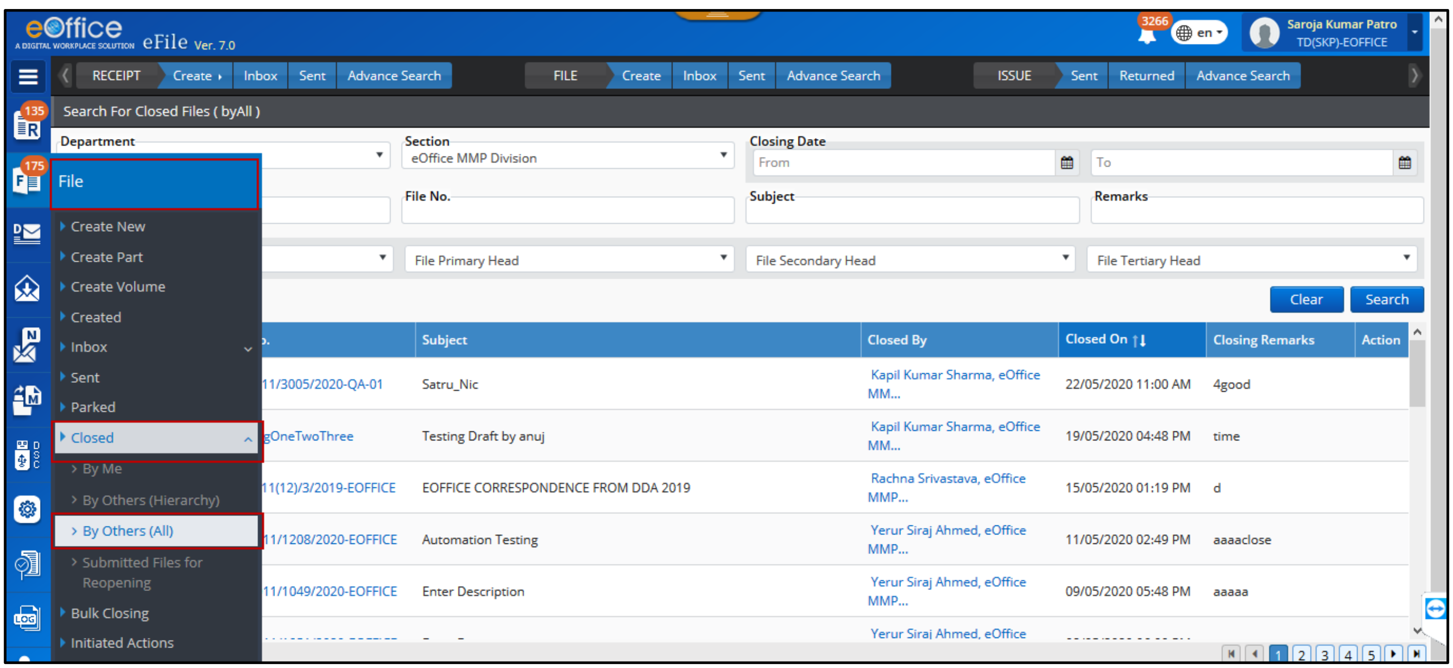


Figure 318

- It displays the list of receipts closed by others users in the viewer's hierarchy downline.
- User will not be able to take any action on receipts with closed state, except to view them.
- Closed File List can be **filtered** with help of various search options such as **Department,Section, Closing date range, Computer No., File No**, **Subject**, **Remarks and File Heads**.

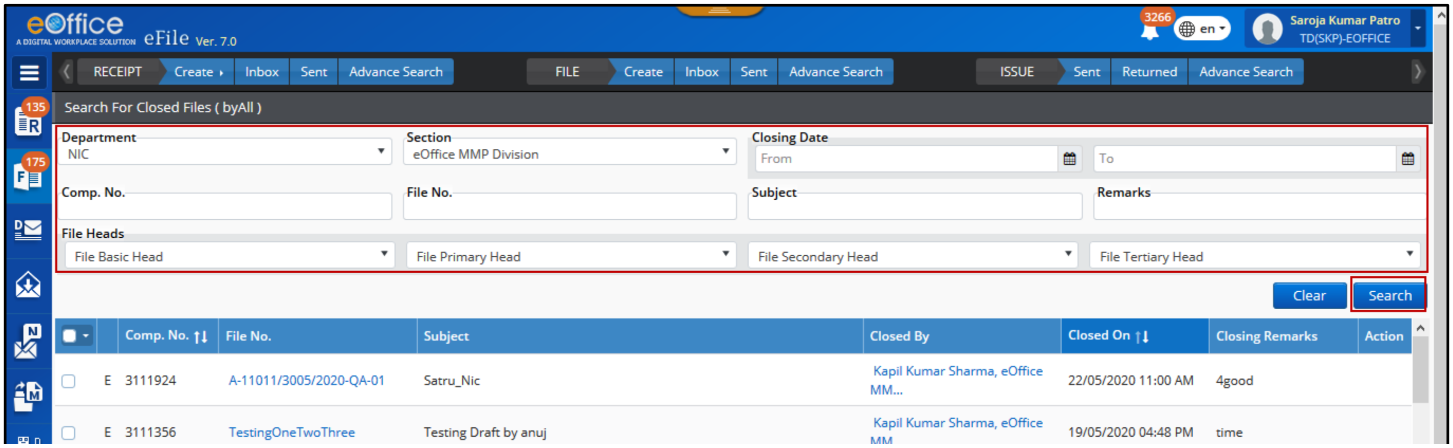


Figure 319

Note:

- Users with role **'Role_ClosedByOthersAll'** will only be able to see this list.

Closed File History:

'Closed File History' provides the details about the number of times the file was closed and re-opened. These details include the type of action taken place (close/re-open), action taken by (user details), action taken date and its remarks for the action.

STEPS TO FOLLOW:

1. Click opens a File from Inbox/Inbox folder/Created/Sent/Closed.
2. Click **Details** Menu.
3. Click **Closed Tab** under History details.

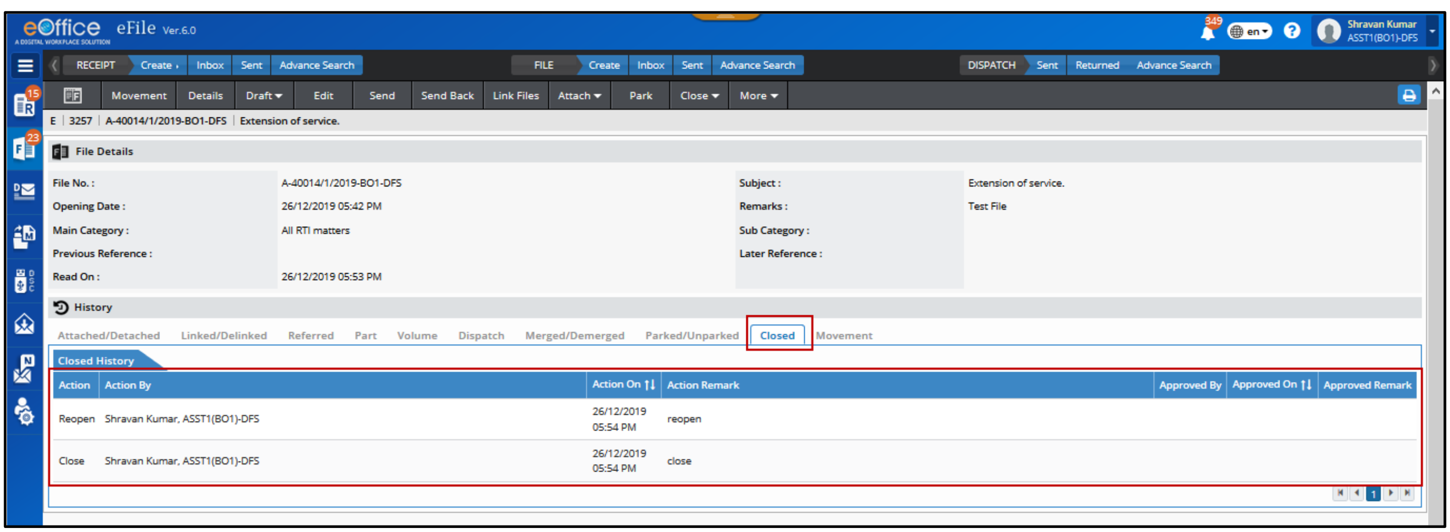


Figure 320

Reopening of File

The re-opening of the File is required often in cases where an already closed File matter is now required to be reopened for further processing.

STEPS TO FOLLOW:

With Role Approver

1. In **Closed→ By Me** list, Click Reopen icon at the end of the File record.

Or

Select Files from **Closed→ ByMe** list and Click **ReOpen** dropdown action button.

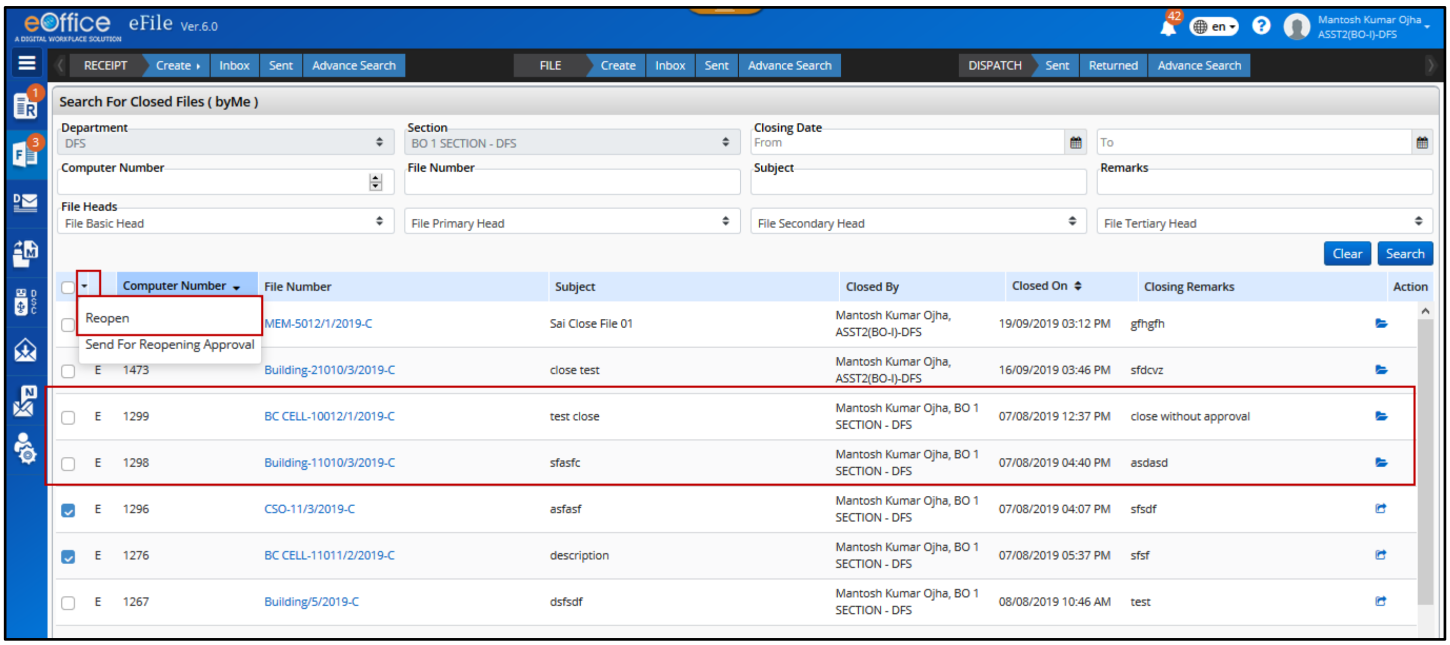


Figure 321

2. Enter the mandatory '**Reopening Remarks**' in the pop-up box and click '**OK**' button.

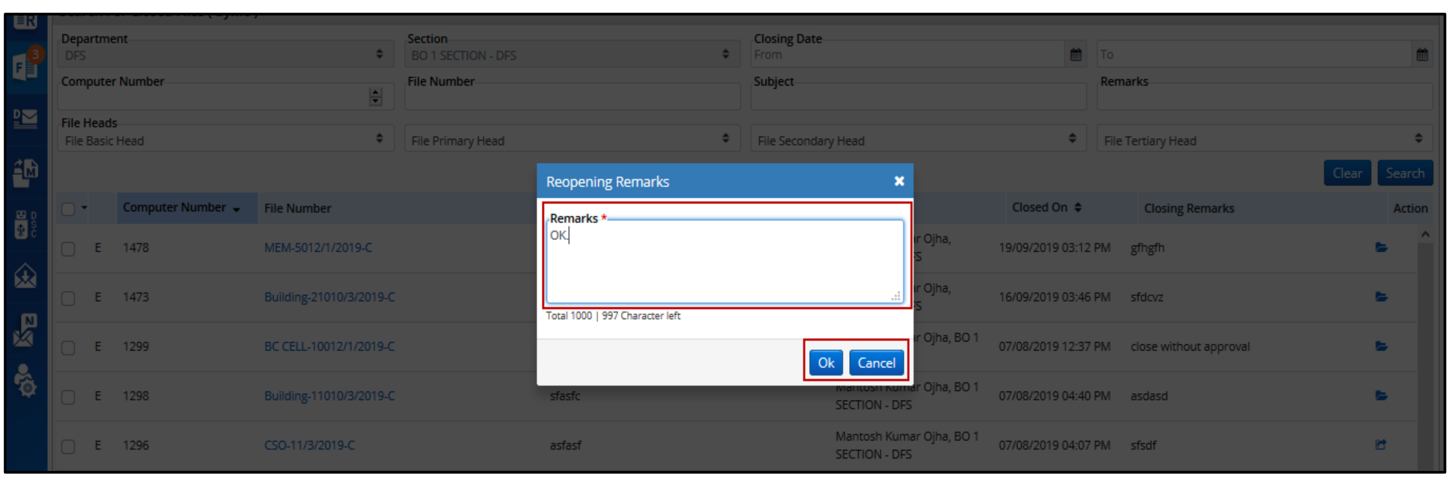


Figure 322

Without Role Approver

1. In **Closed→ By Me** list, Click **Send for Reopen** icon at the end of the File record.

   Or

   Select Files from **Closed→ By Me** list and Click **Send for Reopen** dropdown action button.

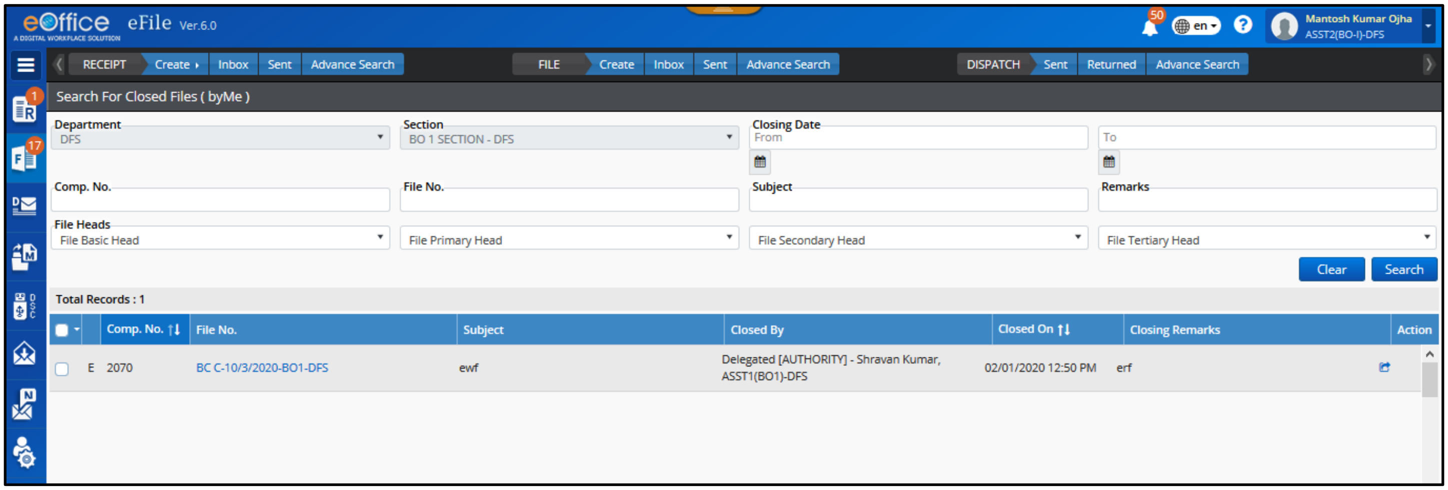


Figure 323

2. Enter approval-seeking remarks in the 'Send File for Reopening Approval' pop up and click **OK** button.

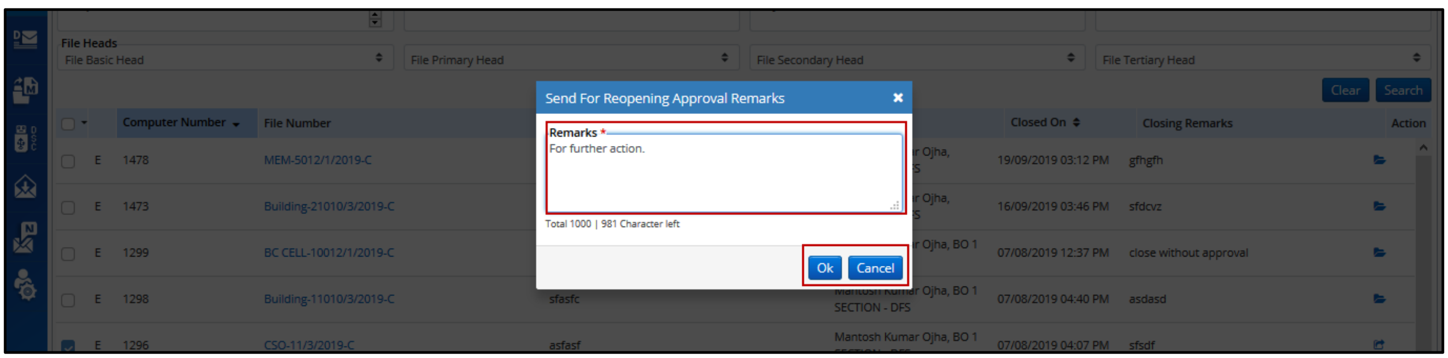


Figure 324

Submitted Files for Reopening Approval

This feature allows the user to **View** the **Submitted Files for Reopening Approval** list and take various actions like **'Close', 'Move to Inbox', 'Cancel'** for **Approved, Rejected and Pending** approval status respectively.

STEPS TO FOLLOW:

Click Submitted Files for Reopening approval Link Under **File→Closed** Module to view list of files send for closing approval.

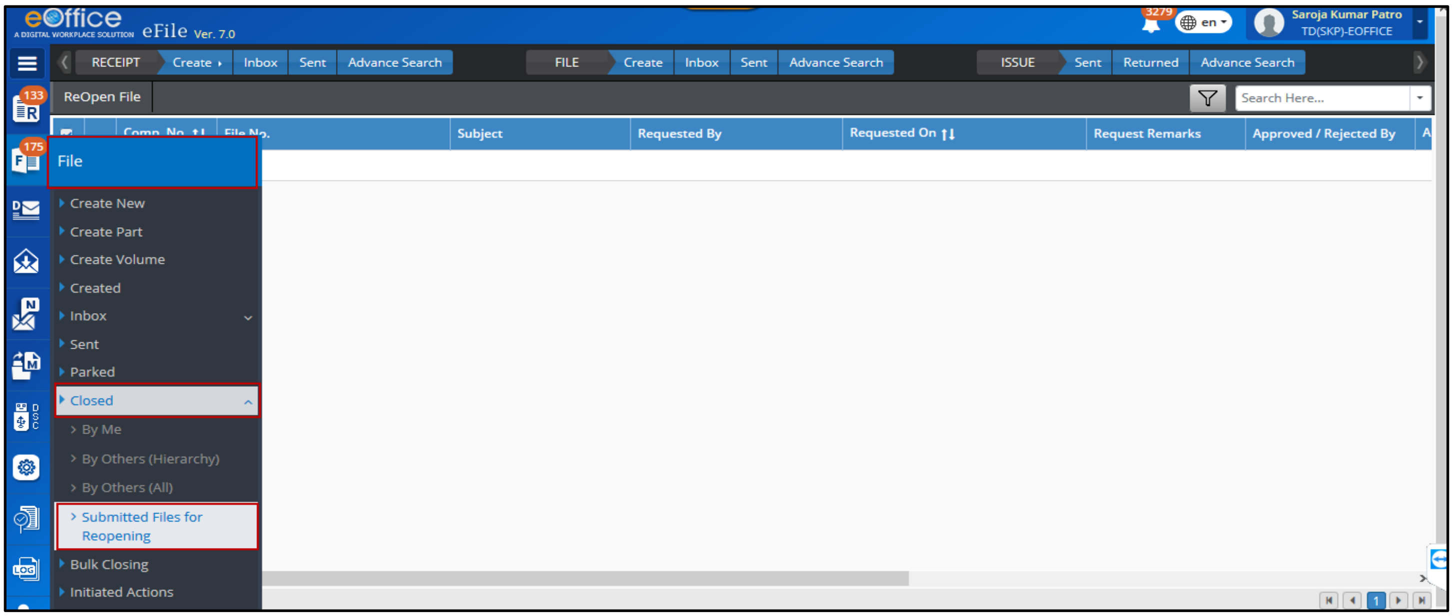


Figure 325

- **Submitted Files for Reopening Approval** list can be **filtered** depending on **Nature, Approval Status, Initiation Date and Rejection Date** by clicking Filter Icon in menu bar.

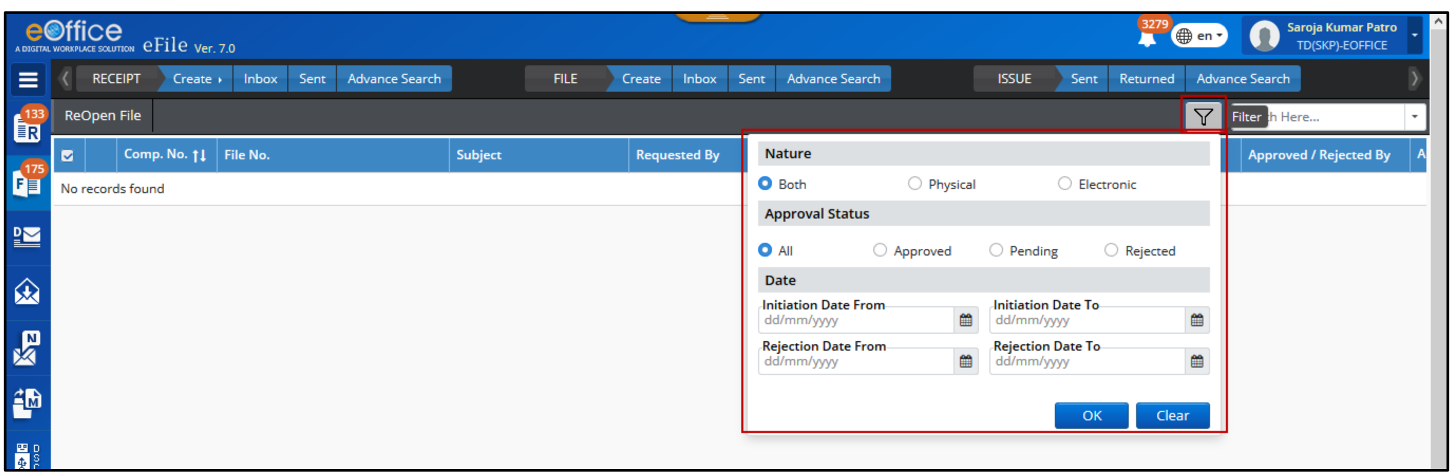


Figure 326

- File available in **Submitted Files for Closing Approval list** can be **Searched** using module search (Computer No., File No., Initiated By, Approved/Rejected By, Dealing Section, Requesting Remarks and Status).

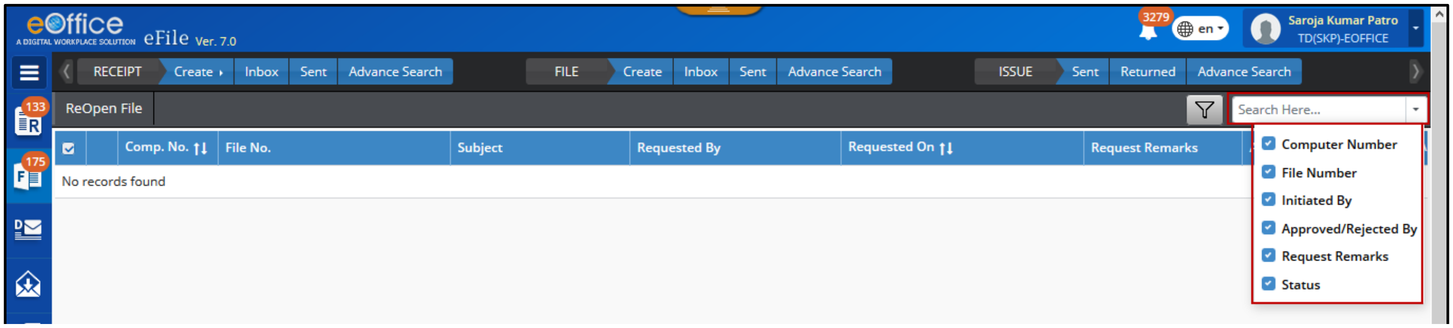


Figure 327

- Files with **Approved** Status can be **Reopened** by clicking on **Reopen** Menu or Link.
- Files with **Rejected** Status can be moved to Inbox by clicking on **Move to Close** Link.
- Files with **Pending** Status can be **Cancelled** by clicking on **Cancel** Link.
- List of **Approvers** can be viewed for that particular file by clicking on '**View Approvers**' link.

Approval Request

This feature allows the user to **View** the **Closing** and **ReopeningApproval Requests** pending with Approver and perform the Approve and Reject actions on the requests. This feature will be available to only users with Role Approver.

Steps to Follow:

Click Approval Request Link under **File** Module to view list of Closing/Reopening approval.

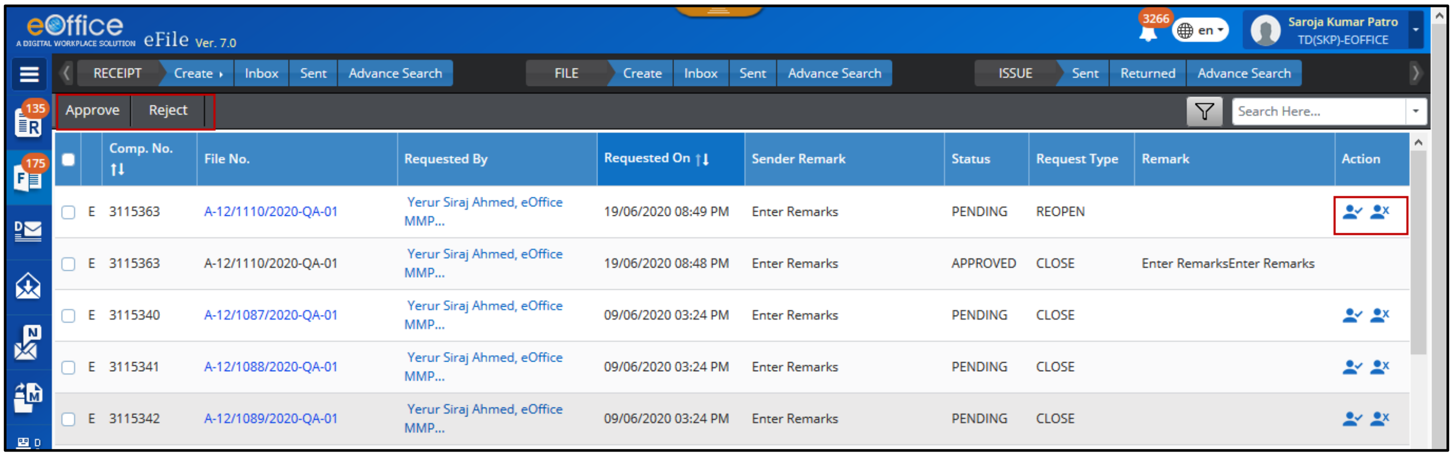


Figure 328

- **Approval Request** list can be **filtered** depending on **Nature, Approval Status, Initiation Date and Rejection Date** by clicking Filter Icon in menu bar.

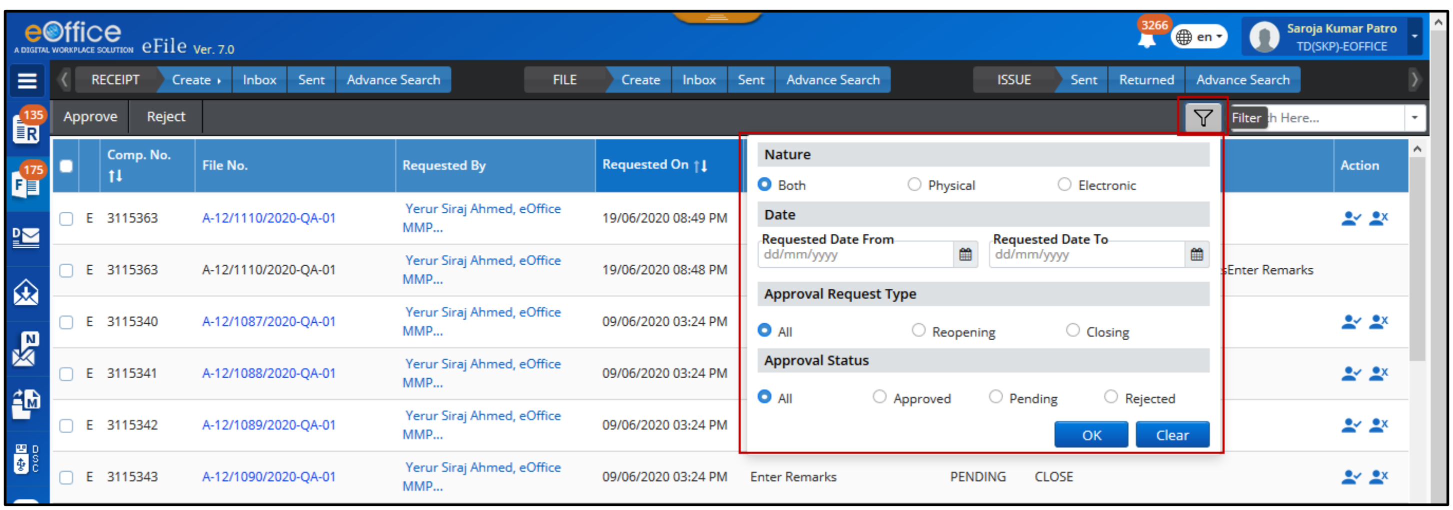


Figure 329

- File available in **Submitted Files for Closing Approval list** can be **Searched** using module search (Computer No., File No., Initiated By, Sender Remarks and Remarks).

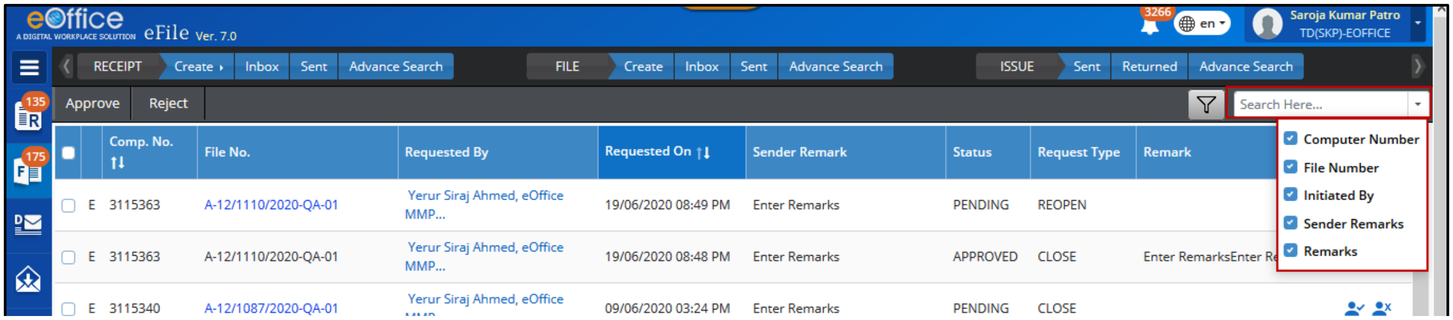


Figure 330

- Clicking on **Approve** Icon or Menu (after selecting request) should open approval remark popup. Entering remark and clicking **OK** should approve the closing/reopening request.

> **Note:**
> - Once approved, the status of the request will be updated as Approved. Same status is also updated at the user end who has submitted the request for approval.

- Clicking on **Reject** Icon or Menu (after selecting request) should open Rejection remark popup. Entering remark and clicking **OK** should reject the closing/reopening request.

> **Note:**
> - Once rejected, the status of the request will be updated as Rejected. Same status is also updated at the user end who has submitted the request for approval.

Pull Up File

This feature allows user to pull up Files from other user's File Inbox/Inbox Folder/Created who are in same section/office, individual's hierarchy or as per the Pull up scope defined by the administrator.

Important Points:

- ✓ Proper Search and Pull up Scope should be assigned to user.
- ✓ File to be pulled up must be attached with other File/Receipt.
- ✓ File to be pulled up must be in Inbox/Inbox Folder/Created folder of other user.

STEPS TO FOLLOW:

From Advance Search Output List

1. Search File to be pulled up in advance search.
2. In Advance Search Output page, click **Pull Up** icon/link for selected File.

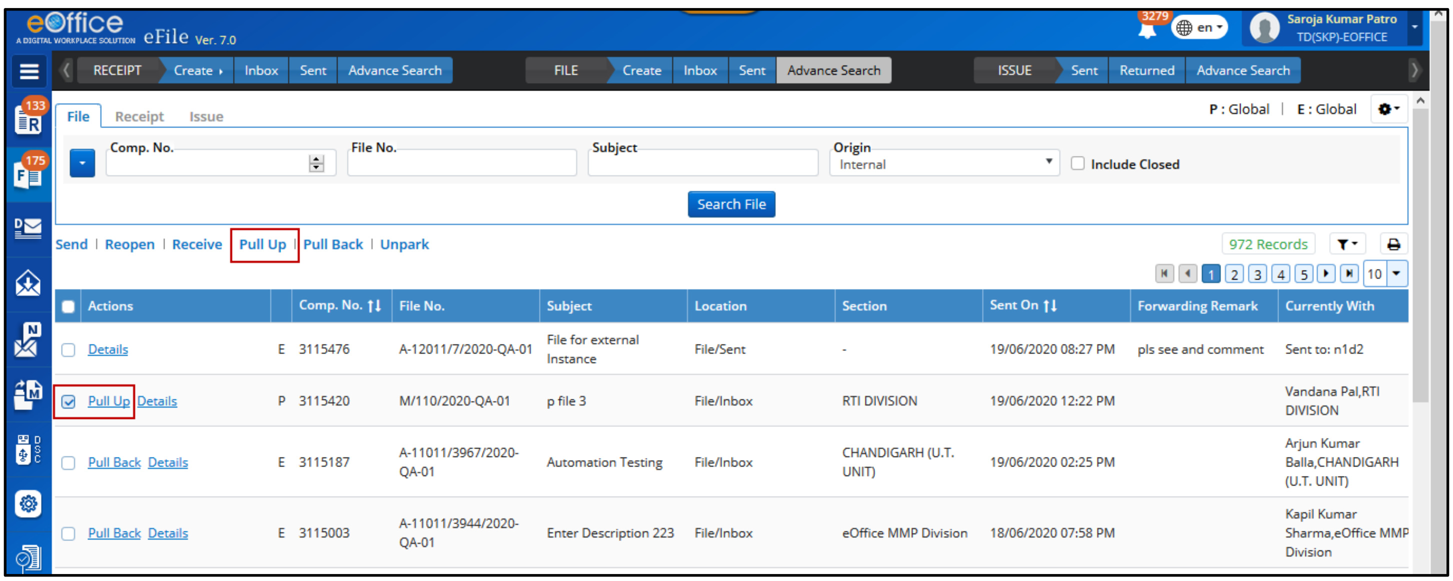


Figure 331

3. Enter Pull Up **Remarks** in the Pull Up Confirmation pop up.

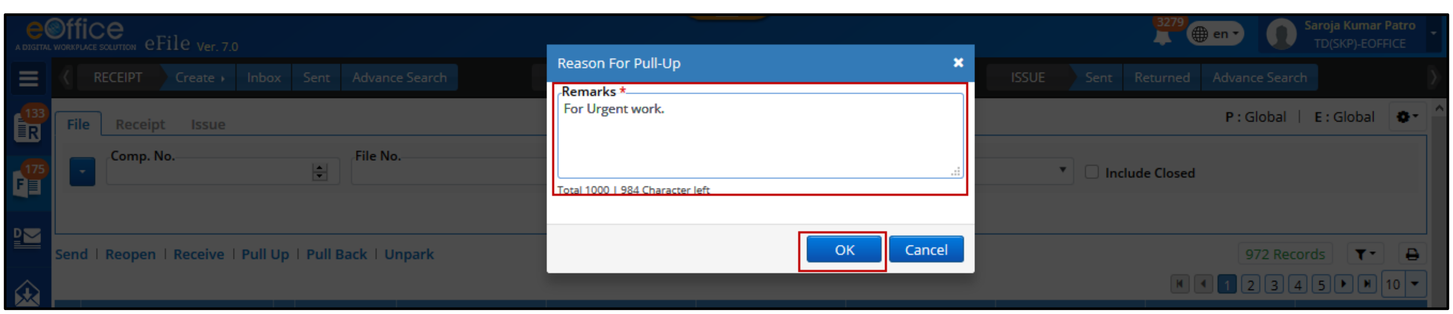


Figure 332

4. Click **OK** to pull up the selected files.

From File View

1. Select user from Section or Hierarchy down line in File view of Inbox/Inbox Folder/Created list.
2. From selected Users Inbox/created list, select File to be pulled up.

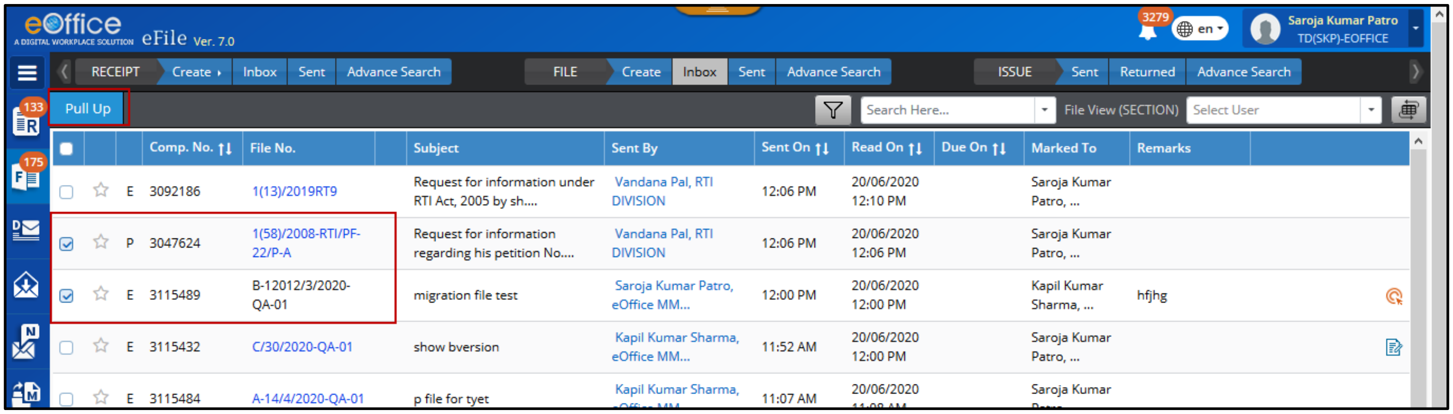


Figure 333

3. Click **Pull up** menu.
4. Enter mandatory **Remark** in Reason for Pull up Popup.

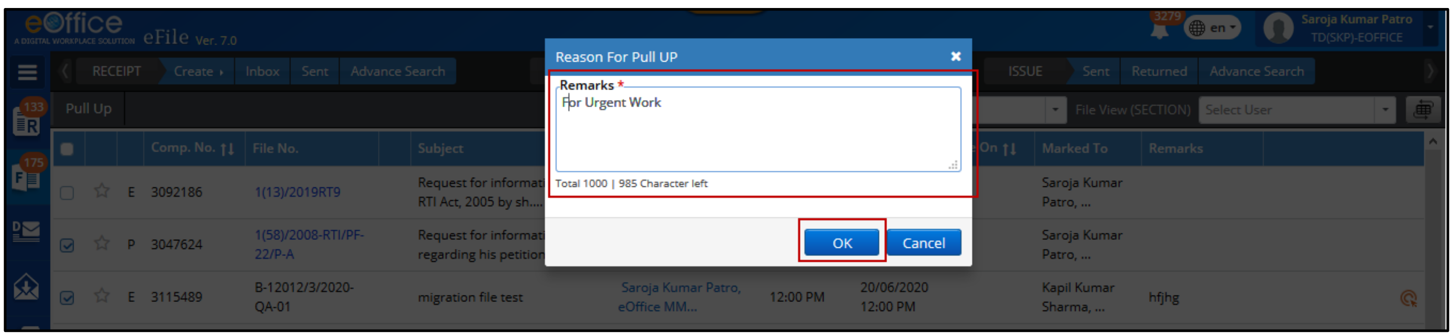


Figure 334

5. Click **OK** to pull up selected receipt(s).

Note:

- Pulled up file will be moved to Inbox of logged in User post.
- Pull up movement will be added in movement history of file with pull up remark.
- After pull up from advance search user will stay on same page with actions (Detail, Send, File No.)
- After pull up from File View user should stay on same page with entry of pulled up file removed from list.

Initiate Action on File

This feature is useful when a user wishes to keep a check/follow-up on the actions taken place on a file when it is still in the movement of channel of submission without having to call back the file every time. This is called as '*initiating an action on a file*'.

The action can be initiated by a user while forwarding file or for the ones which have been already sent. The recipients of such file can then add their comments or record their inputs, which can be then reviewed by the initiator against every movement.

This feature is useful, in cases, when the head of the organization/department plans to monitor the inputs of the employees towards the disposal of file, by reviewing their comments recorded at every movement.

'Initiate Action' primarily consists of –

1. **Initiating an Action** – Initiated against the receipt by the initiator for review **while forwarding**.
2. **Adding Comments/Action Details** – Users recording their comments with every movement **of receipt received with INITIATED ACTION**.
3. **Review/Initiated Action Details**– Reviewing the comments recorded with every movement, **by the initiator**.
4. **Close Initiated Action** – The action initiated on a receipt can later be then closed, as required.

Initiate Action

This section describes the process of initiating a cycle of actions while forwarding a receipt or on already sent receipt.

Important Points:

- ✓ File must be available in file Inbox/Inbox Folders/Created list.
- ✓ ACTION on File in sent box, can only be INITIATED for the ones in active state (not closed).
- ✓ File must not have currently active initiated action.
- ✓ External (eOffice Instance) should not be selected on File Send Page.

STEPS TO FOLLOW:

From File Send Page

1. Select file(s) or Click open a file from Inbox/Inbox Folder or Created list.
2. Click **Send** menu.

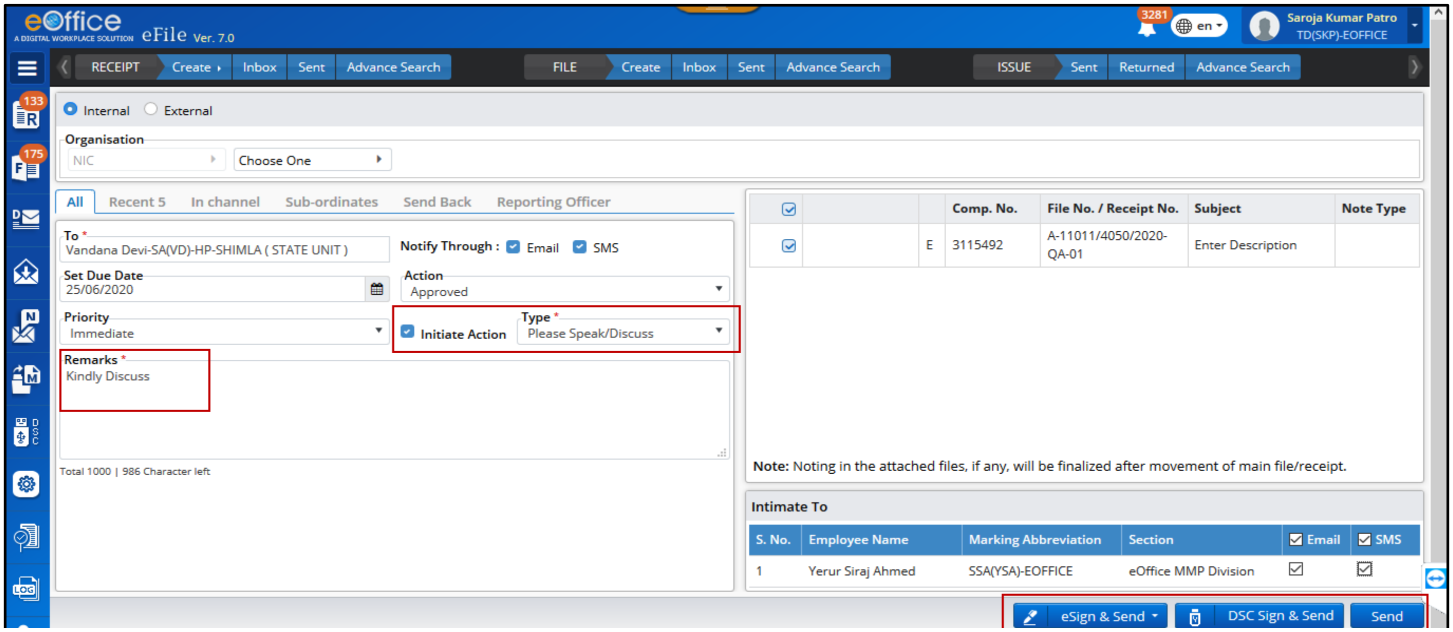


Figure 335

3. Select user in **To** field (Select the user from segregated employee List using any of "All" , "Recent 5", "In Channel", "Sub-ordinates", "Send Back" and "Reporting Officer").

Note:

- **All:** List will display all the active users in the department.
- **Recent5:** List will display last five distinct users to whom file was sent respectively.
- **In channel:** List will display the list of users who were in channel of previous movement.
- **Sub-ordinates**: List will display the sub-ordinates placed below the logged in employee in the post (individual) hierarchy.
- **Send Back**: Previous sender of file will be displayed.
- **Reporting Officer**: List will display the reporting officer placed above the logged in employee in the post (individual) hierarchy.

Or

4. Select user in **To** field from the **Organization hierarchy** list in case for single instance multiple departments.
5. Select **Due Date**
6. Select **Action**
7. Select **Priority**
8. Select **Initiate Action** and **Initiation Type** (*Configurable & role based*)
9. Enter **Remarks** (*mandatory for Initiate Action*)
10. Select **Notify Through** (SMS/Mail) using checkbox to notify receiver. (*If required*)
11. Select **Intimate Through** (SMS/Mail) using checkbox to intimate users in previous movements. (*If required*).
12. Click **Send** to forward file.

From File Sent List

1. Click **Initiate Action** Icon for a File in Sent list.

Figure 336

2. Select **Initiation Type** in the 'File Initiation Confirmation' pop up.

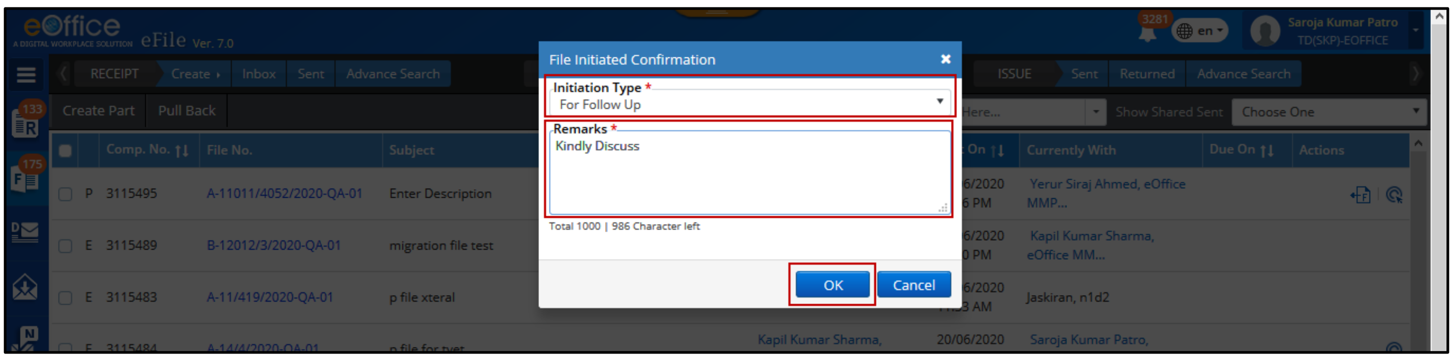


Figure 337

3. Give Mandatory **Remarks**.
4. Click **OK** to initiate action.

Note:

- Entry will be made in Initiated Action list under File Module for the user who has initiated the action and for other users of same section.
- Files in recipient's Inbox/Inbox Folder on which action is initiated will demarcated by legend.
- Further initiate action will not be allowed for the same file till the existing initiated action is closed.
- Initiated action details should be displayed under Action Details for the file.
- User with whom file is lying (in Inbox/Inbox folder/Parked) can add comments to the initiated action.
- Initiate Action link will be removed for files in Sent list on which an (one) action has been initiated.

View and Add Comments to Initiated Action

This Feature is required to add view and add comments on initiated action on File.

STEPS TO FOLLOW:

From File Inner page of a File in Inbox

1. Click opens a File from Inbox/ Inbox Folder/Parked.
2. Click **More→Action Details** menu to View Action Details.
3. Click **Add Comment** link in the Action Details page (*Available for active Initiated Actions Only*).

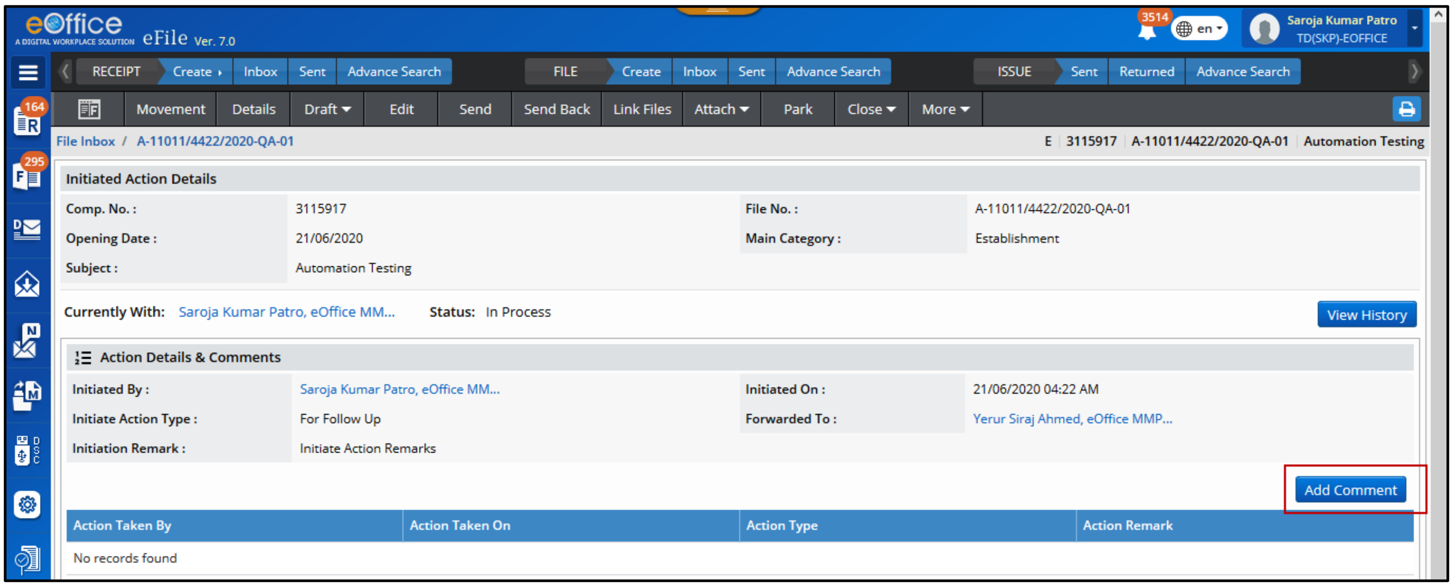


Figure 338

4. Select value from **Action Type*** combo box.

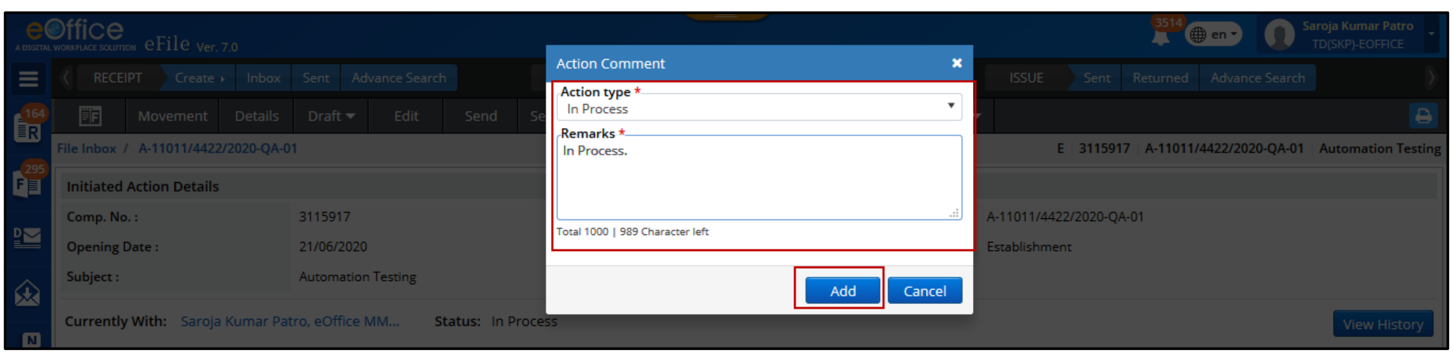


Figure 339

5. Enter mandatory **Remarks**.
6. Click **Add** to add Comments.

From a File Already Attached to a Receipt in Inbox

1. Click opens a Receipt from Inbox/Inbox Folder/Created.
2. Click **Attach File→Attach** Menu.
3. Click **Action Details** icon for File in Attached Files List to View Action Details.
4. Click **Add Comment** link in the Action Details page (*Available for active Initiated Actions Only*) (**Figure 338**).
5. Select value from **Action Type*** combo box (**Figure 339**).
6. Enter mandatory **Remarks (Figure 339**).
7. Click **Add** to add Comments (**Figure 339**)

From a File Already Attached to a File in Inbox

1. Click open a File from Inbox/Inbox Folder/Parked/Created.
2. Click **Attach File→Attach** Menu.
3. Click **Action details** icon adjacent to File in Attached Files List to View Action Details.
4. Click **Add Comment** link in the Action Details page (*Available for active Initiated Actions Only*). **Figure 338**
5. Select value from **Action Type*** combo box (**Figure 339**)
6. Enter mandatory **Remarks (Figure 339**).
7. Click **Add** to add Comments (**Figure 339**).

From Advanced Search Output

1. Search file in **Advanced Search** module.
2. Click **Details** link in the search output entry.
3. Click **Action Details** link in the Movement Details pop up page to View Action Details.
4. Click **Add Comment** link in the Action Details page (*Available for active Initiated Actions Only*). **Figure 338**
5. Select value from **Action Type*** combo box (**Figure 339**).
6. Enter mandatory **Remarks** (**Figure 339**).
7. Click **Add** to add Comments (**Figure 339**).

Note:

- User can view History of previously initiated actions and action comments on file by clicking on **View History** on Action Detail Page.

Closing Initiated Action

This feature allows user to Close Initiated Action.

Important Points:

- ✓ Initiated Action Listing must be section specific.
- ✓ User should be able to **Search** and **View Details** of initiated action.
- ✓ Role (ROLE_ACTION_INITIATOR) must be assigned to the users for Closing the initiated actions.

STEPS TO FOLLOW:

1. Click **Initiated Action** link under File module.

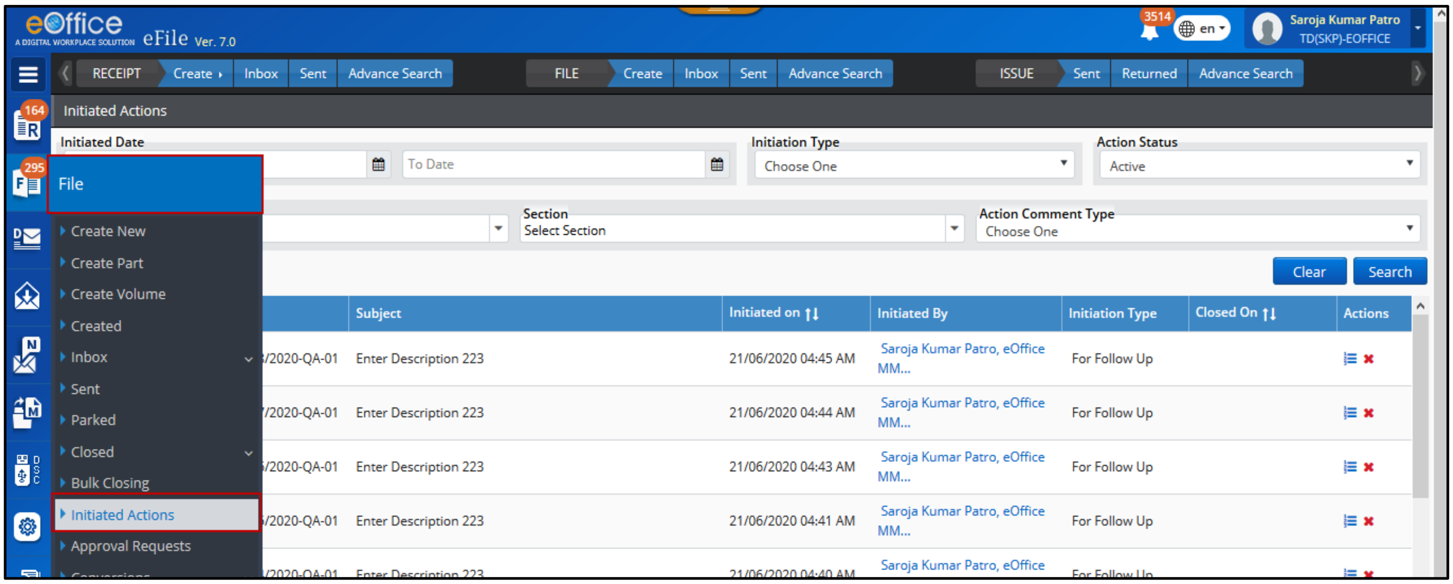


Figure 340

2. Search the File using Search Parameters at the top.

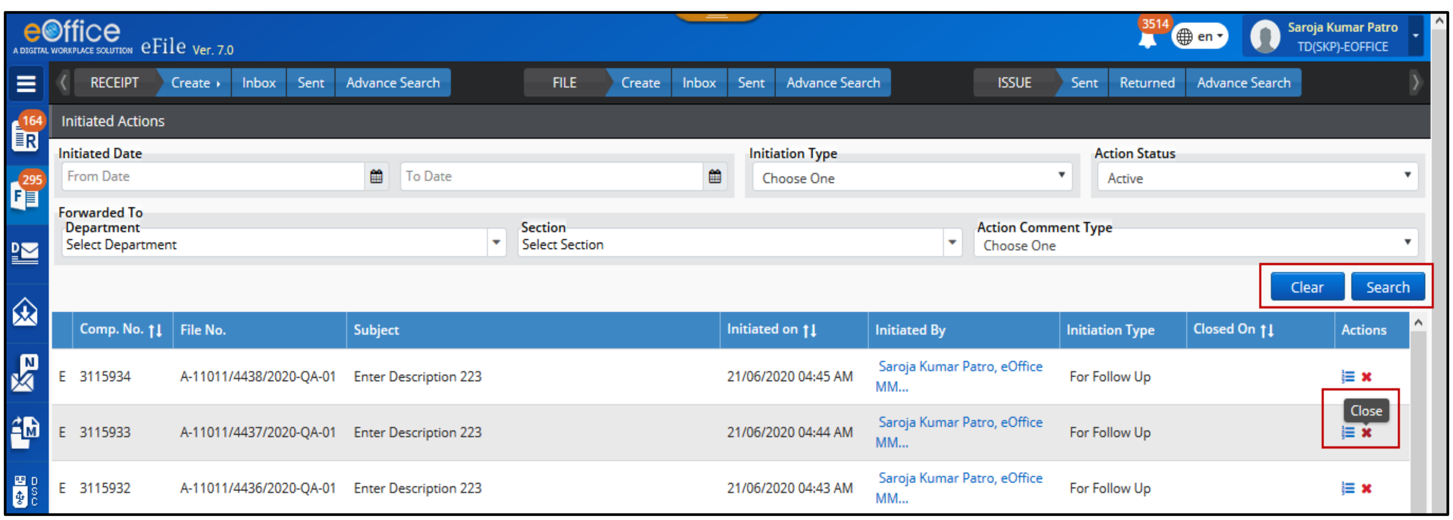


Figure 341

3. Click **Close** icon under actions against the receipt number to view the recorded comments and other details.

4. Enter the mandatory **Remarks**.

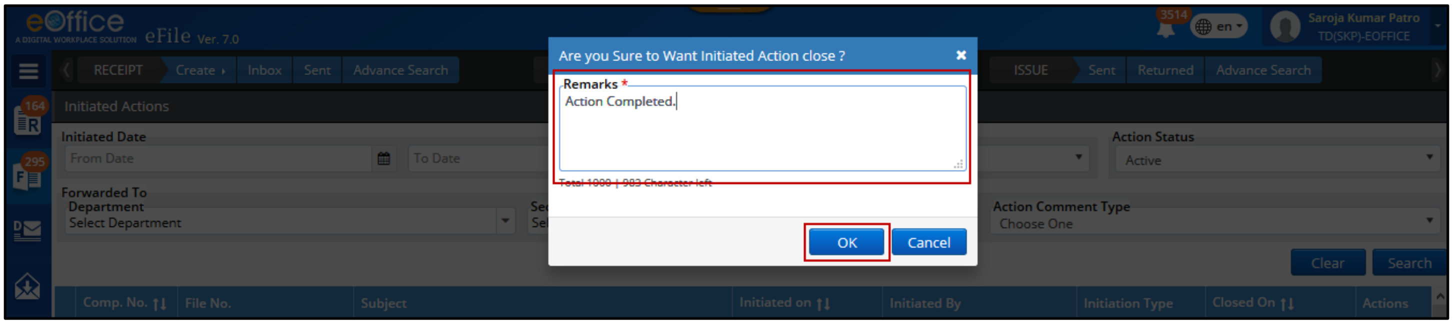


Figure 342

5. Click **OK** to Close the Initiated Action

Convert File from Physical to Electronic

This feature allows user to Convert Physical File to Electronic File.

Important Points:

- ✓ Physical File must be present in Inbox/Inbox Folder/Created list.
- ✓ Physical file must be in received state in Inbox/Inbox Folder.
- ✓ File to be converted should not have any Attached File(s) or Receipt(s).
- ✓ Noting and Correspondence (If Available) must be uploaded in File Conversion page.
- ✓ Only users of **Dealing Section** can initiate conversion process.

STEPS TO FOLLOW:

1. Click open a physical file to view file inner page from Inbox/Inbox Folder/ Created list.
2. Click **Convert** menu to open Conversion page.

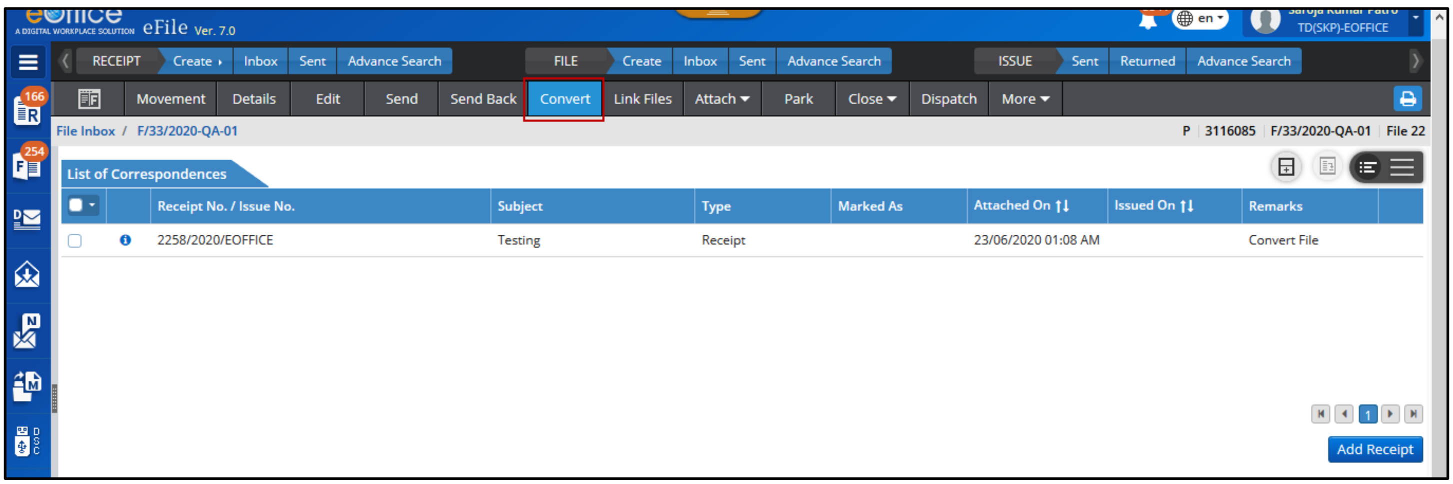


Figure 343

3. Click **Upload** icon adjacent to **attached correspondence** in Correspondence section to upload Scanned Receipt(s)/Issue(s) in PDF format from the system.
4. Click **Upload** icon in **noting** section to upload Scanned noting in PDF format from the system.
5. Click **Finalize** Conversion button to open confirmation Pop up.

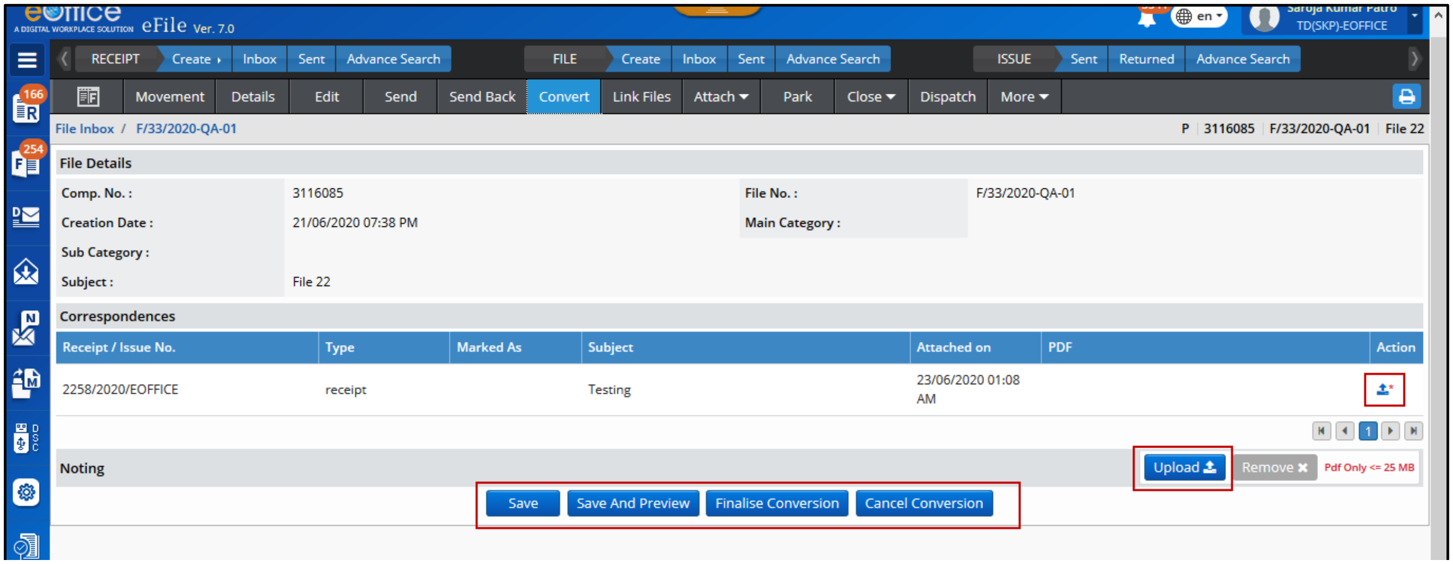


Figure 344

6. Enter mandatory **Remarks** in File Conversion pop up.
7. Click **OK** button to convert file.

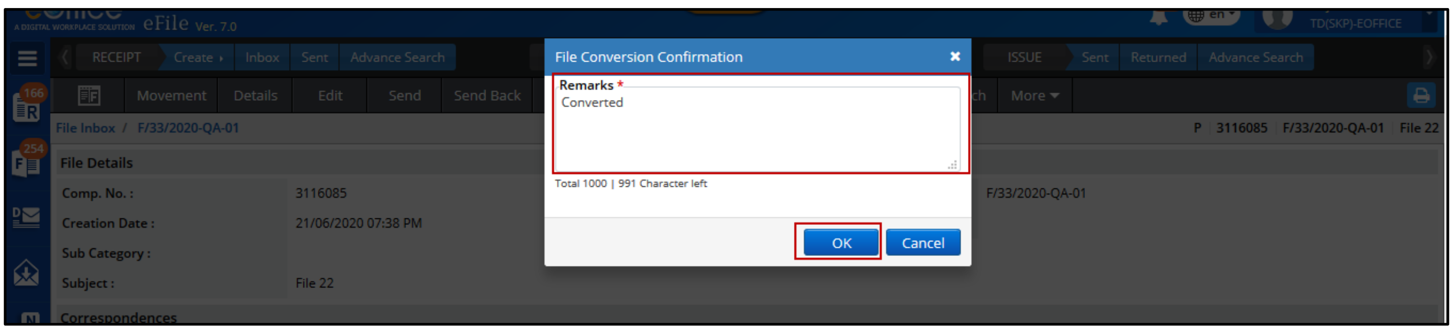


Figure 345

Note:

- Physical File will be converted to electronic file.
- Uploaded Noting should be attached in Green Note as an attachment.
- In case of attached Correspondence(s), Receipt(s)/Issue(s) should be converted to electronic Receipt(s)/Issue(s) after uploading. (Change of nature from P to E)
- Files Saved for Conversion will be displayed in **Conversion→Draft** List Page.
- Details of the conversion of the file will be displayed in **Conversion→Completed** List Page.

File Conversion Draft List

File Conversion Draft List will display files that are saved for conversion. User can open file from this list page by clicking on File Number and Finalize the Conversion process.

- Click **File→Conversion→Draft** to open conversion draft list page.

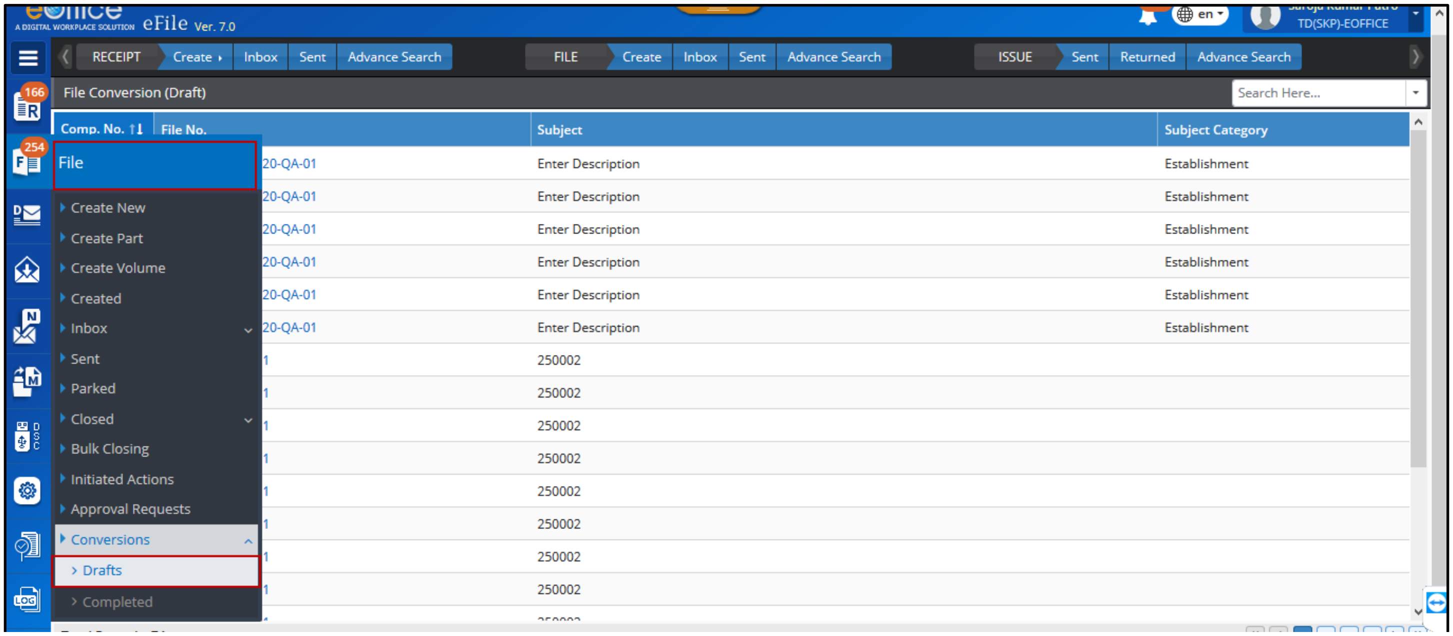


Figure 346

- File available in **Conversion Draft list** can be **Searched** using module search (Computer No., File No., Subject and Subject Category).

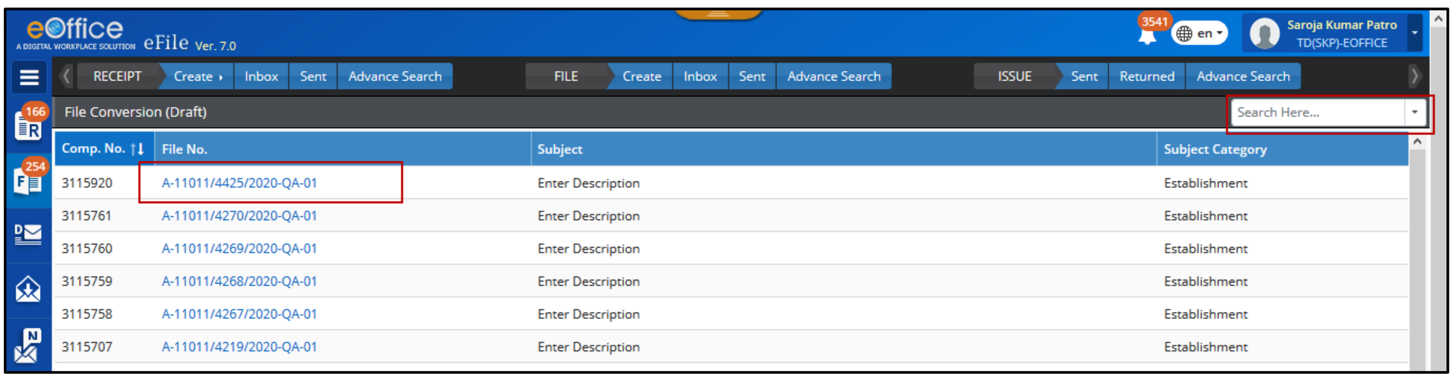


Figure 347

File Conversion Completed List

File Conversion Completed List will display record of Files which were converted to electronic File.

- Click **File→Conversion→Completed** to open conversion draft list page.

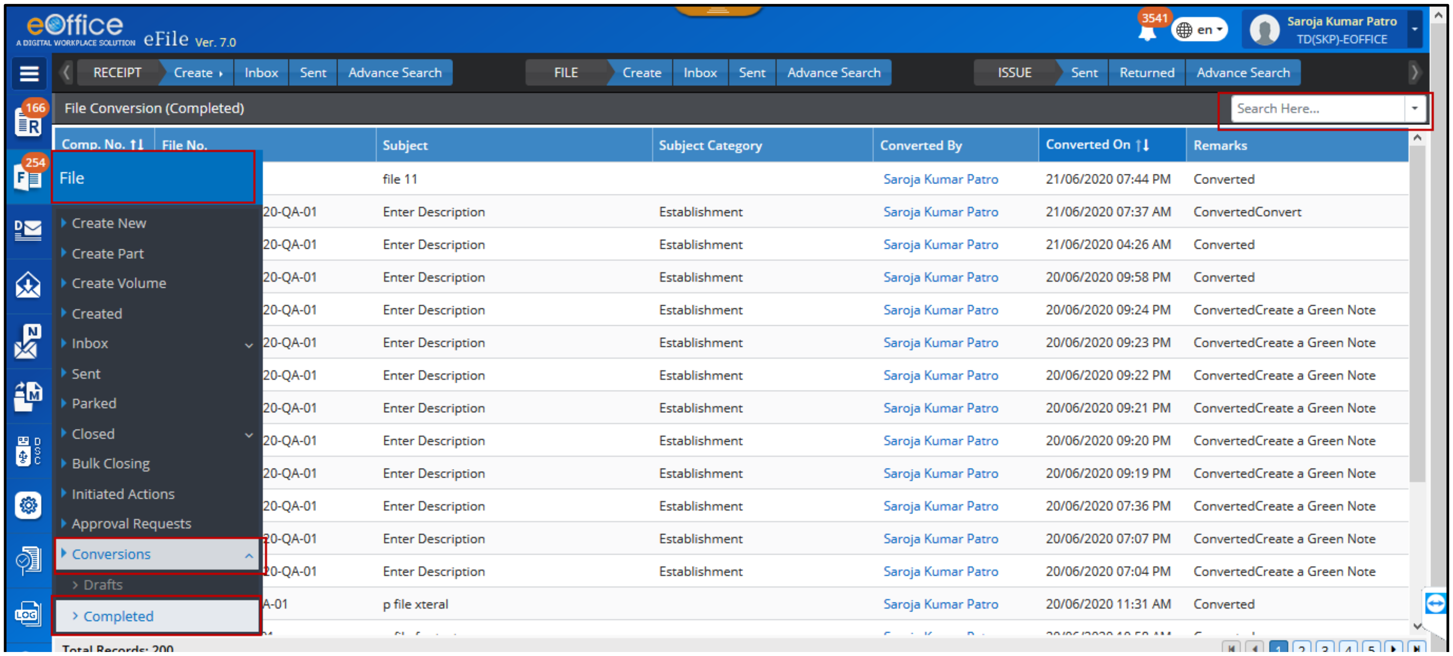


Figure 348

- File available in **Conversion Completed list** can be **Searched** using module search (Computer No., File No., Subject, Subject Category, Converted By and Remarks).

Consolidated View of File

This Feature allow user to view files available on his or her multiple posts in a single window.

STEPS TO FOLLOW:

1. Log into eFile account to view file inbox list of primary post

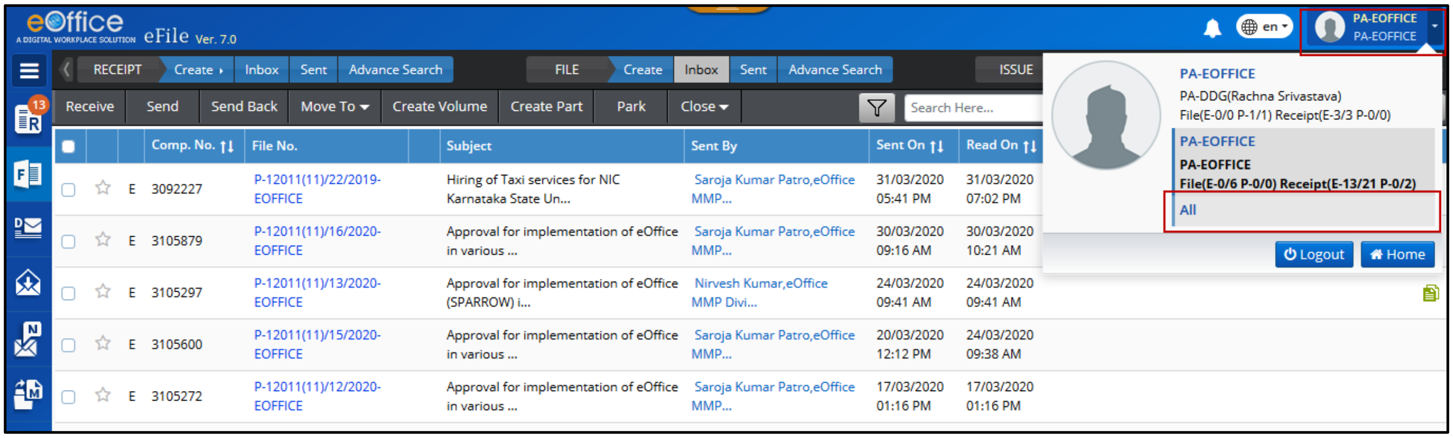


Figure 349

2. Click "**All**" posts link available in dropdown under Logged in user's Primary post in profile area.

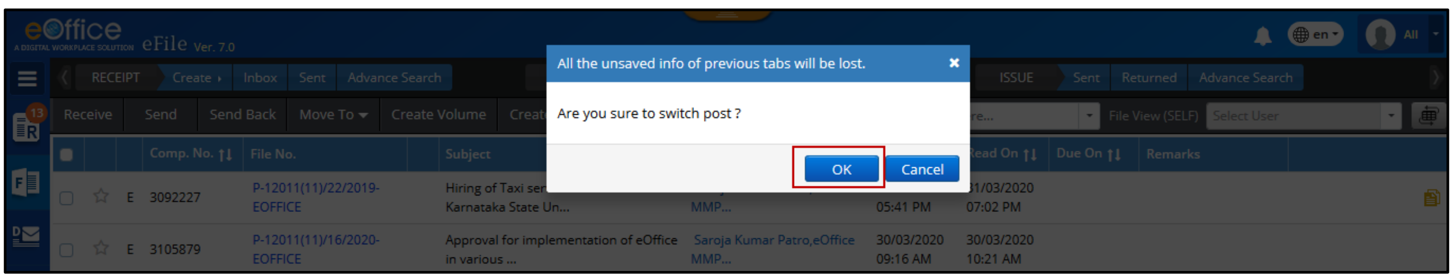


Figure 350

3. Click OK in confirmation popup to switch to consolidated view.

Consolidated File Inbox

- Consolidated Inbox will display files marked to users multiple posts in a single Inbox list.
- Fields Like Computer No., File Number, Subject, Sent By, Sent On, Marked To (Post), Due On, Read on and Remarks are displayed
- Actions on single file selection- **Receive** (*Applicable for unreceived physical files only*), **Send Back, Send, Park, Close, Send for closing approval, Create Part, Create Volume** (*Applicable for physical files only*) can be taken.
- File inner page can be viewed by clicking on **File Number**.
- **Sent By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.

- Inbox View can be switched from Advance (Row based) to Normal (Column Based) by clicking on switch icon
- User can create **part file** of individual electronic and physical file (*User will be redirected to respective post to which individual file in inbox is marked*)
- User can create **volume file** of individual physical file (*User will be redirected to respective post to which individual file in inbox is marked*)
- Consolidated Inbox List can be **filtered** depending on **Nature**, **Priority**, **Subject Category** and **Sent Date**, **Due Date**, etc. by clicking Filter Icon in menu bar.
- List of Files can be sorted based on **Computer No., Sent On and Due On**.
- Files can be searched using Module Search (**Computer No., File No., Subject, Sent By and Remarks**)
- Using context menu (on mouse right click) Inbox files can be **Received** (*Unreceived physical file only*),**Opened in Same or Different Tab** of browser and can be **Send** or **Send Back**
- Clickable Attachment Icon should be displayed next to file no. in case of file having an attached File/Receipt.
- Legends and Color Code should be used to differentiate various file in list.

Note:

- File(s) in Inbox folder of user's various post should be displayed in Consolidated Inbox List.

Consolidated File Created List

- Consolidated Created list will display files created by users multiple posts in a single created list.
- Fields like Computer No., File Number, Subject, Subject Category, Created By, Created on and Remarks are displayed.
- Actions on single file selection- **Send, Close, Create Part, Create Volume** (*Applicable for physical files only*) can be taken.
- File inner page can be viewed by clicking on **File Number**.
- **Created By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.
- User can create **part file** of individual electronic and physical file (*User will be redirected to respective post to which individual file in inbox is marked*)
- User can create **volume file** of individual physical file (*User will be redirected to respective post to which individual file in inbox is marked*)
- Consolidated Created List can be **filtered** depending on **Nature, Subject Category and Creation Date** by clicking Filter Icon in menu bar.

- List of Files can be sorted based on **Computer No. and Created On**.
- Files can be searched using Module Search (**Computer No., File No., Subject, Subject Category and Remarks**)
- Using context menu (on mouse right click) created files can **Opened in Same or Different Tab** of browser and can be **Send**.
- Clickable Attachment Icon should be displayed next to file no. in case of file having an attached File/Receipt.
- Legends and Color Code should be used to differentiate various file in list.

Consolidated File Sent List

- Consolidated Sent list will display files sent by users multiple posts in a single list.
- Fields like Computer No., File Number, Subject, Sent By, Sent To, Sent On, Currently with and Due On are displayed.
- Actions on single file selection- **Create Part, Pull Back and Initiate Action** can be taken.
- File inner page can be viewed by clicking on **File Number** in Read only Mode.
- **Sent By** and **Sent To** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name.
- User can create **part file** of individual electronic and physical file (*User will be redirected to respective post to which individual file in inbox is marked*)
- User should be able to **Initiate Action** on individual electronic and physical file (*Action should be initiated from post from which individual file is forwarded*)
- User should be able to Pull Back individual Unreceived (P)/Unread (E) Files. (*Action on Multiple selection is allowed if selected files are forwarded from same post*)
- Consolidated Sent List can be **filtered** depending on **Nature, Subject Category, Sent Date and Due Date** by clicking Filter Icon in menu bar.
- List of Files can be sorted based on **Computer No. and Created On**.
- Files can be searched using Module Search (**Computer No., File No., Subject, Sent On and Due On**)
- Clickable Attachment Icon should be displayed next to file no. in case of file having an attached File/Receipt.
- Legends and Color Code should be used to differentiate various file in list.

Print/Download File

This feature allows user to Print/Download content of File as per selection

Important Points:

✓ User must have assigned **Role_DOWNLOADER.**

STEPS TO FOLLOW:

1. Click **Download** action button on File Inner Page to open Downloading page.

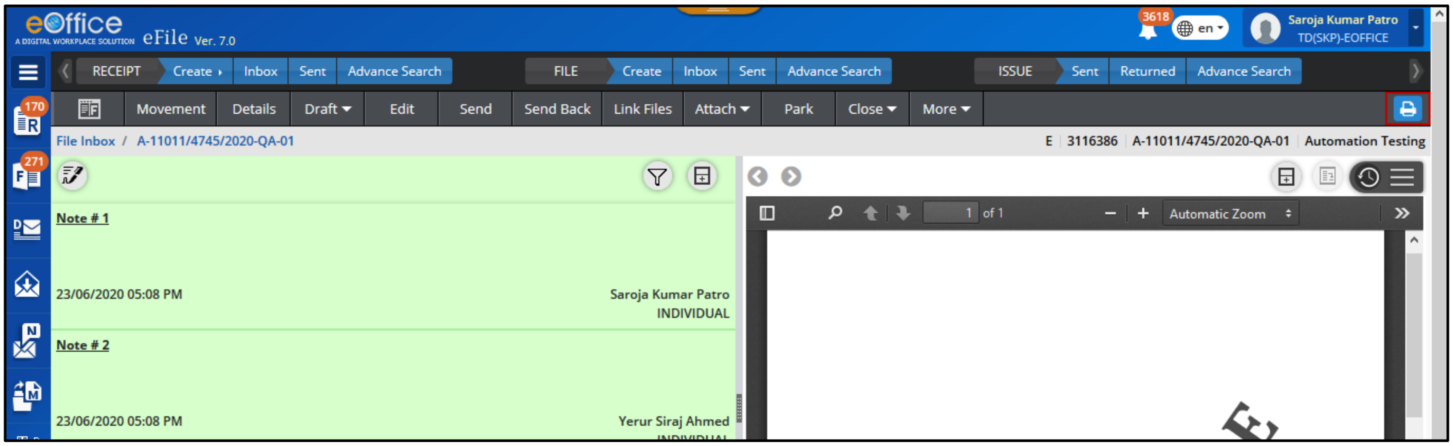


Figure 351

2. Select the **Radio** Button (Complete File, Details, Noting, Correspondences, Draft, Local References, Movements History, and Action Detail) as per requirement.

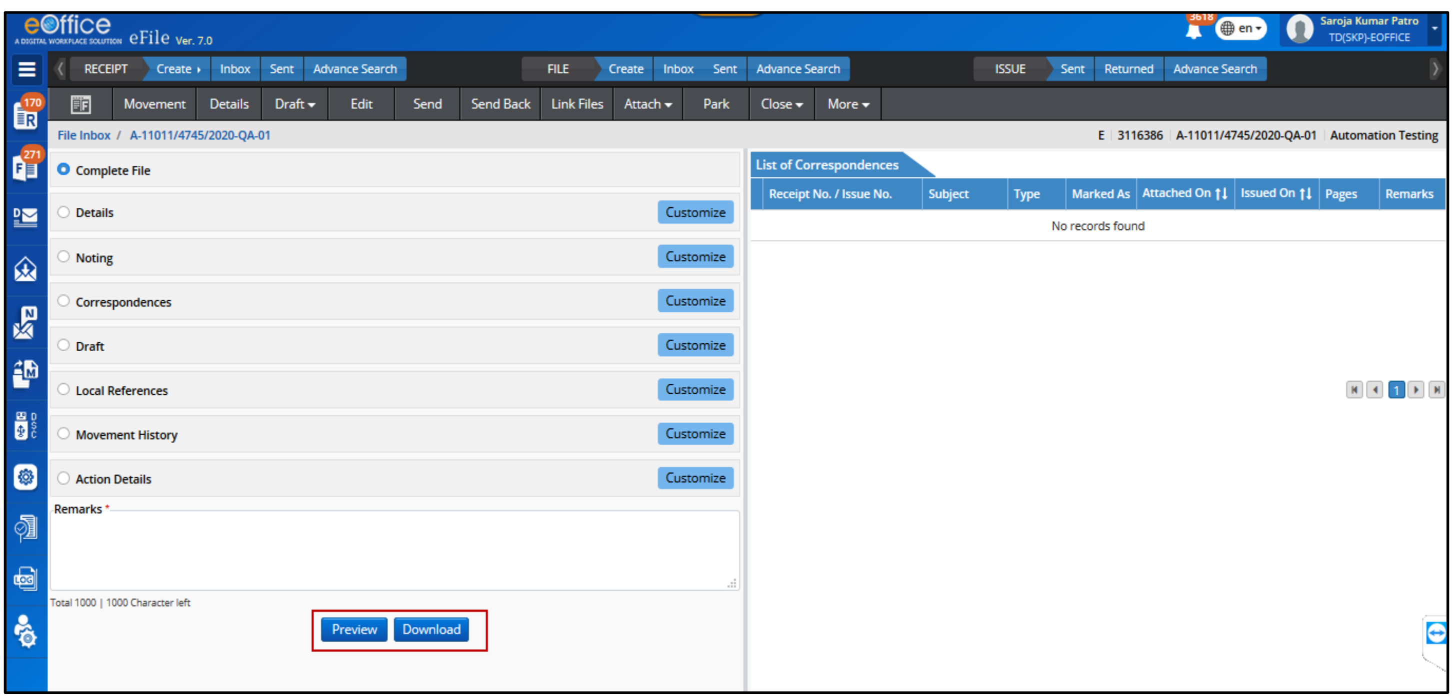


Figure 352

3. Select **Customize** button (if required) to download selected content of Details, Noting, Correspondence, Draft, Local Reference, Movements History, and Action Detail.

4. Click **Preview** Button to view selected content. (*If Required*)

5. Click **Download** Button.

Note:

- Selected Content of eFile will get downloaded to Systems in PDF format.
- File No. (Computer No.) will be embossed on every page of downloaded File.
- Draft no., Issue no., Receipt no. will be embossed on respective documents.
- Correspondence Page no. will be embossed on all correspondence.
- Downloaded page sequence No. should be embossed on every page at center Bottom.

Advance Search for File

This Feature allows User to users to Search and Retrieve Files (According to the assigned Search Scope) and take actions on searched records (According to assigned Action Scope).

Important Points:

- ✓ Search Privileges must have been set for instance level by administrator. (Refer search privilege for whole instance).
- ✓ Search privilege if set for user must restrict or allow the user to search and take action beyond the scope set for whole instance (Refer search privilege for individual user).

STEPS TO FOLLOW:

1. Click **Advanced Search** link in **File Quick Access** Menu. (*System redirects to the 'Advanced Search' screen with 'File' tab activated by default*.)

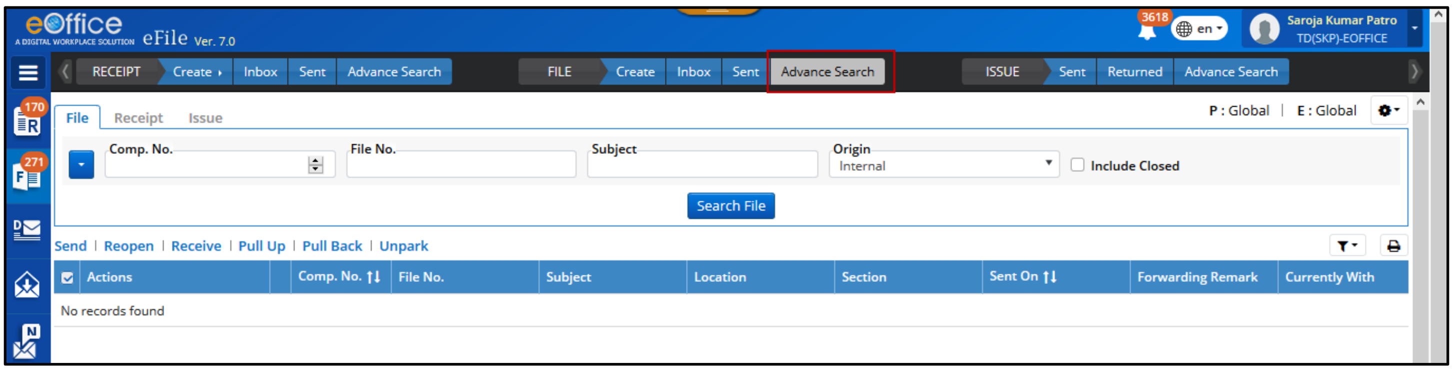


Figure 353

2. Select **Physical Scope** and **Electronic Scope** (*By Default Value is Global or as per assigned Search Scope*).

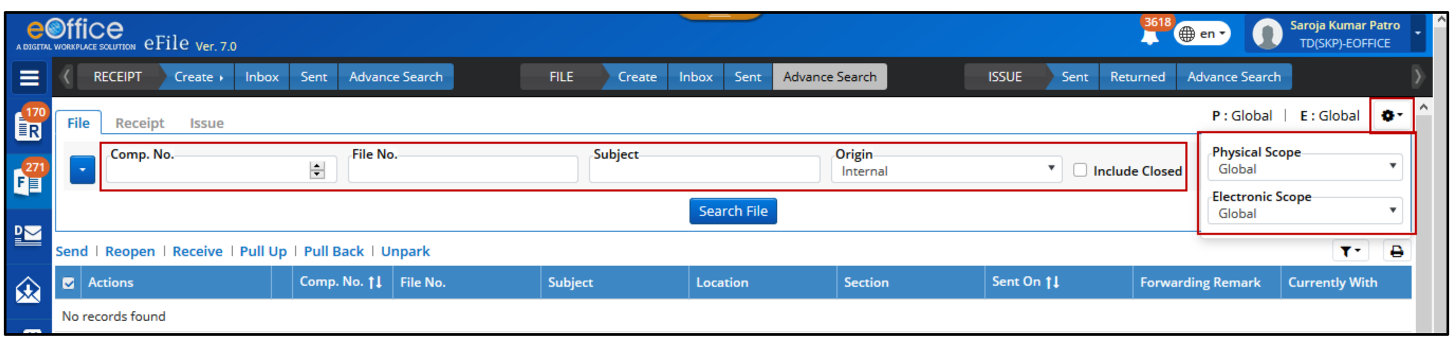


Figure 354

3. Search from main **Basic parameters** (Computer no., File No., Subject or Origin).
4. Select **Additional parameters** from dropdown list icon to search with additional inputs. (*Received/Sent, File Heads and Creation details*)

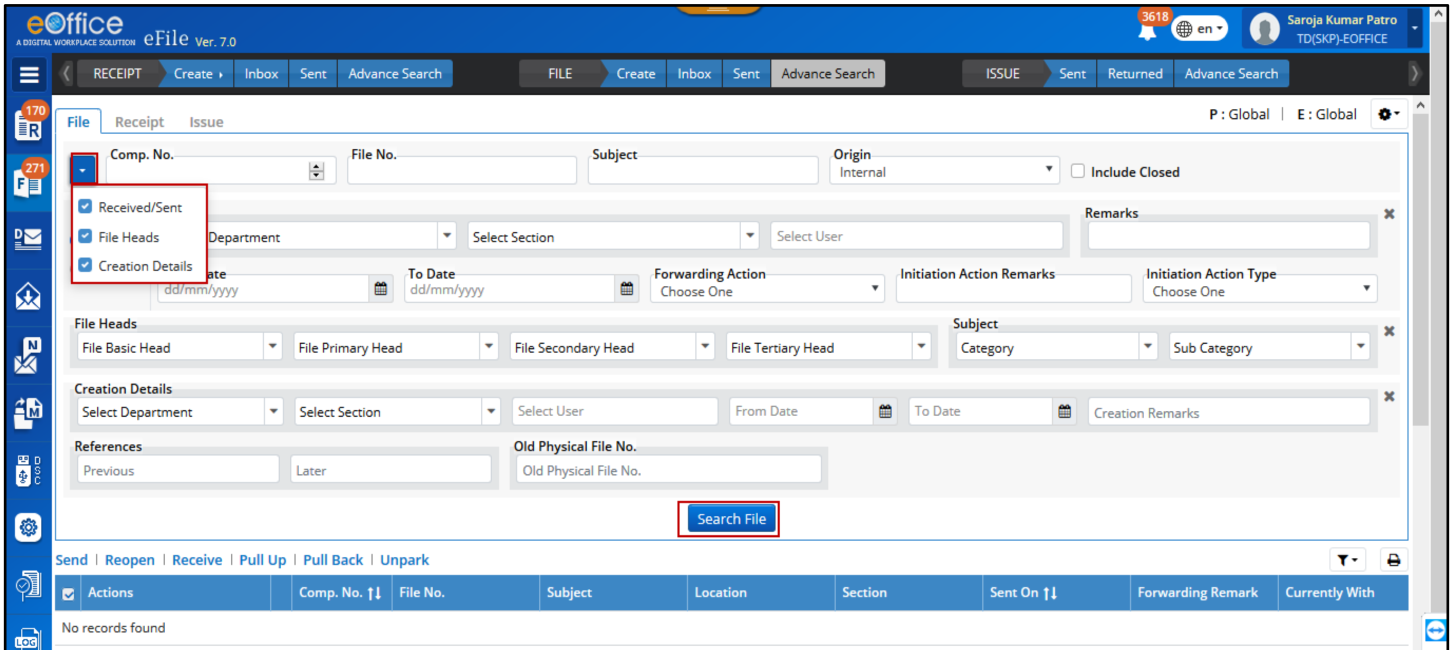


Figure 355

> **Note:**
>
> - Additional Parameters will not be available if Origin of File is selected External.

5. Click **Search File** button to search the file records.
6. Opt for default output fields or Select/Remove output fields. (*Computer No., File No., Subject and Location cannot be removed*)

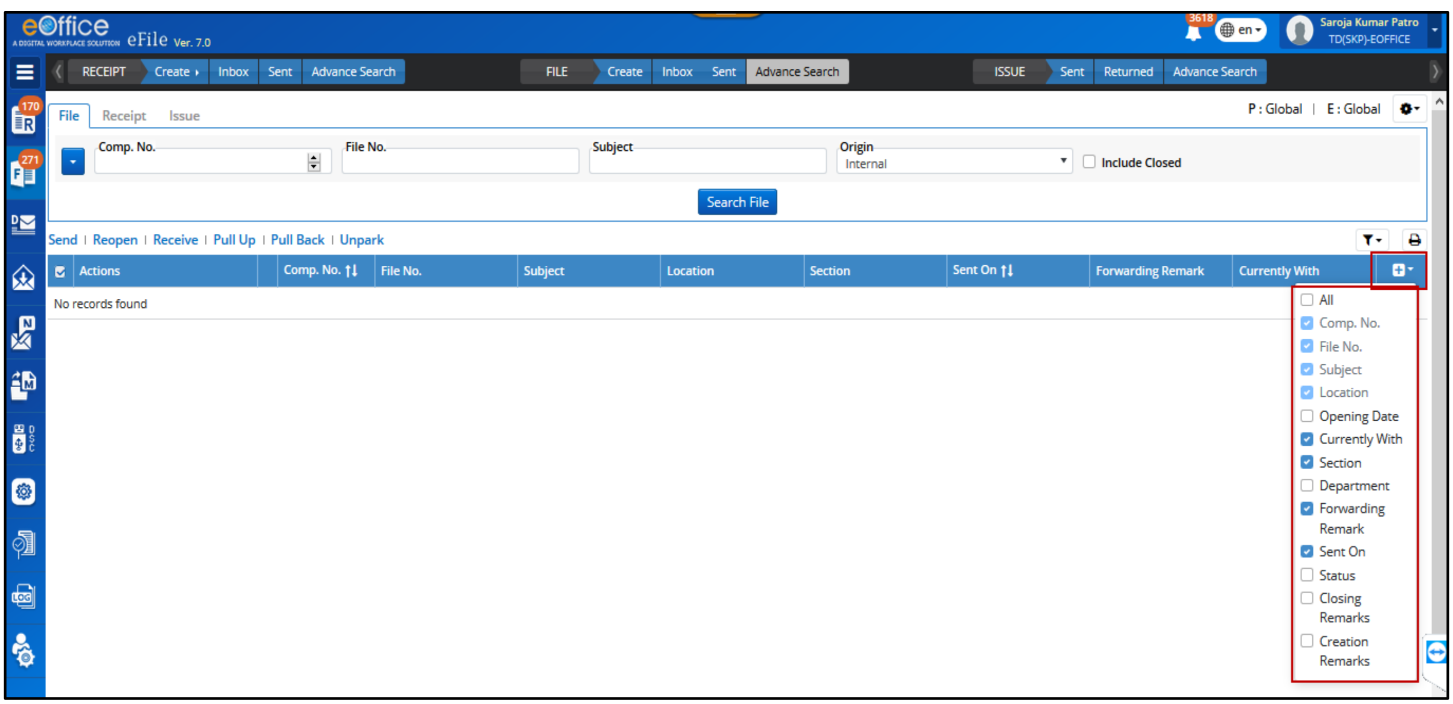


Figure 356

Note:

- List of files will be displayed based on selected input search parameters values.
- Searched record will display file(s) depending on their current location.
- Searched record list can be sorted depending on Active, Created, Parked and Closed File.
- By Default Closed File will not be displayed in output. User should have to select **Include Closed** checkbox to retrieve closed File Record.

Actions Allowed on Searched Receipt

- **Send:** Clicking **Send** Action Link/Menu (for single/multiple File) should open send window to forward single/multiple File.

Note:

- This action will be applicable when File is available in signed in user's File inbox/inbox folder/Created List.

- **Reopen:** Clicking on **Reopen** Action Link/Menu (for single/multiple File) should open Reopen Remark popup. On providing mandatory **Remark** and Clicking **OK** should Reopen the File.

Note:

- In case User **have Role Closing Approver**, **Reopen Remark pop up** will be displayed.
- In case User is **not having Role Closing Approver**, User will be redirected to **Submit File for Reopening Approval Pop up**.
- This action will be applicable when File is available in signed in user's **Receipt Closed (By Me) List.**

- **Receive:** Clicking on **Receive** Action Link/Menu (for single/multiple File) should Receive unreceived physical File to user's File inbox.

Note:

- This action will be applicable when physical File is available in user's File Inbox/Inbox folder in unreceived state.

- **Pull Up:** Clicking **Pull up** Action Link/Menu (for single/multiple File) should open a confirmation popup. Providing **Remark** and clicking **OK** should Pull Up single/multiple File to user's File inbox.

Note:

- This action should be displayed depending upon action scope set for whole eOffice Instance.
- Action scope for individual will superimpose scope set for whole instance.

- **Pull Back:** Clicking **Pull Back** Action Link/Menu (for single/multiple File) should open a confirmation popup. Providing **Remark** and clicking **OK** should Pull Back single/multiple File to user's Receipt inbox.

Note:

- This action will be applicable when File is available in signed in user's File sent list and remained in unread/unreceived state in recipient Inbox.

- **Details:** Clicking on details action link should display the complete Details and Movement of File.

File Migration

This feature allows user to Migrate Physical File data into eFile from FTP Server.

Create New Migrated File

Important Points:

- ✓ Old Physical Files (Scanned Noting, Receipts, Issue and References in PDF format) must have been uploaded on FTP server
- ✓ User must have necessary folder permissions to the view and select the files uploaded on FTP server.

STEPS TO FOLLOW:

1. Click **Create New** link in File Migration Module.
2. Select the **File heads** required for generating File no. for new eFile.
3. Click **Choose One** to select and upload the scanned file (from the list of the files under respective folders in File Selection Popup).

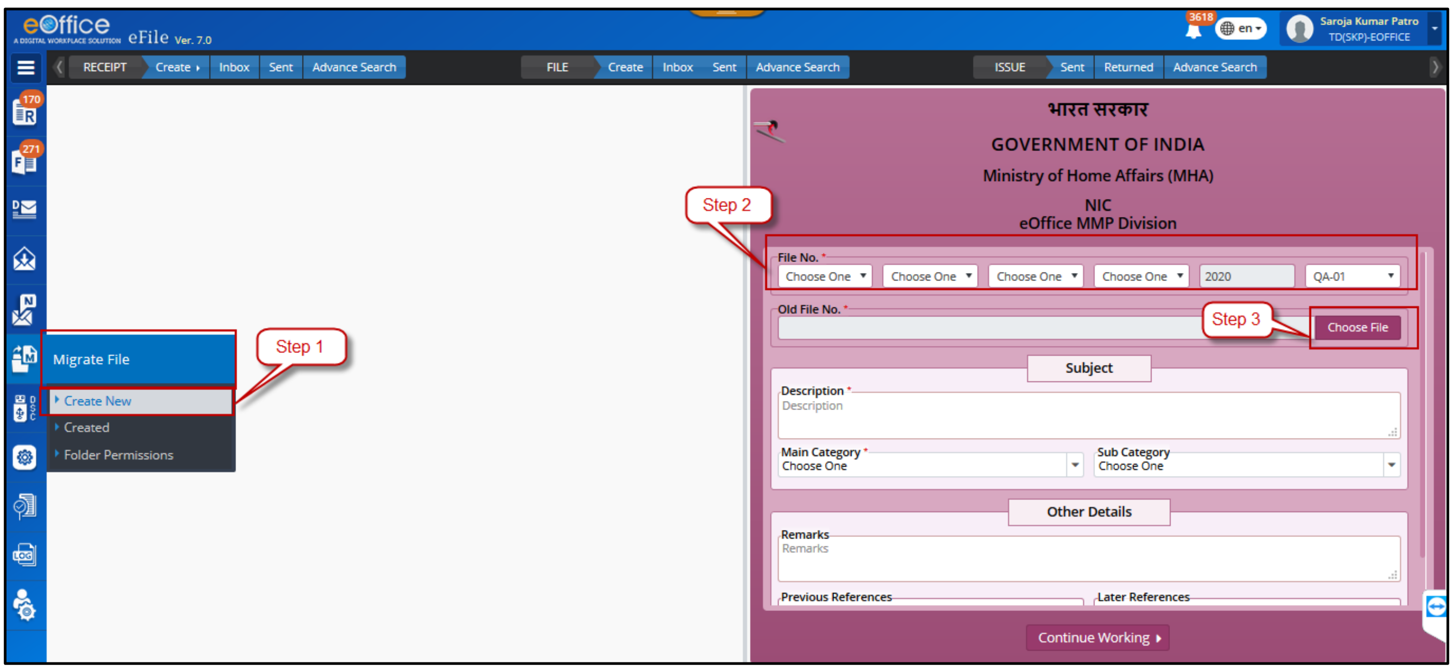


Figure 357

4. Click **Import** to select the file from the list. (Old Physical File No. get auto populated as per selection)

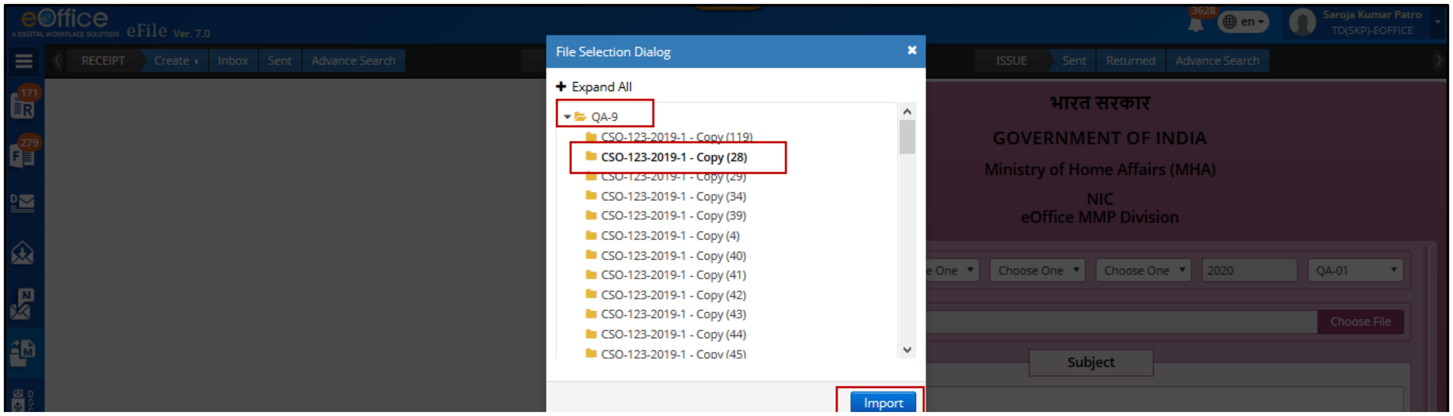


Figure 358

5. Select the required documents (PDF) from respective folders (Issues, Receipts. References and Noting).

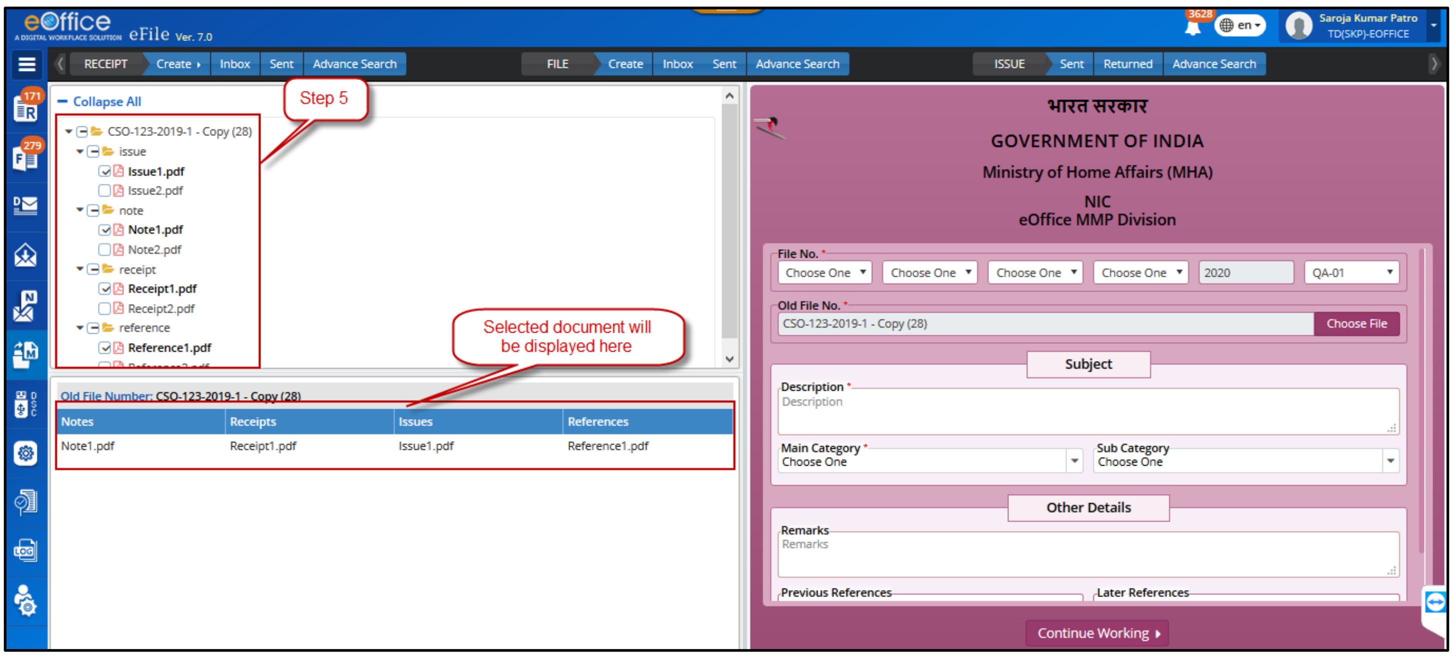


Figure 359

6. Enter mandatory values for Description, Opening date of Physical file.
7. Select Main Category, Sub Category, Previous and Later Reference, Language values.
8. Enter Mandatory **Opening Date**.
9. Click on **Continue Working.** (Migrated File Inner page will be displayed with option to Edit, Update Correspondence Metadata and Finalize Migration.)

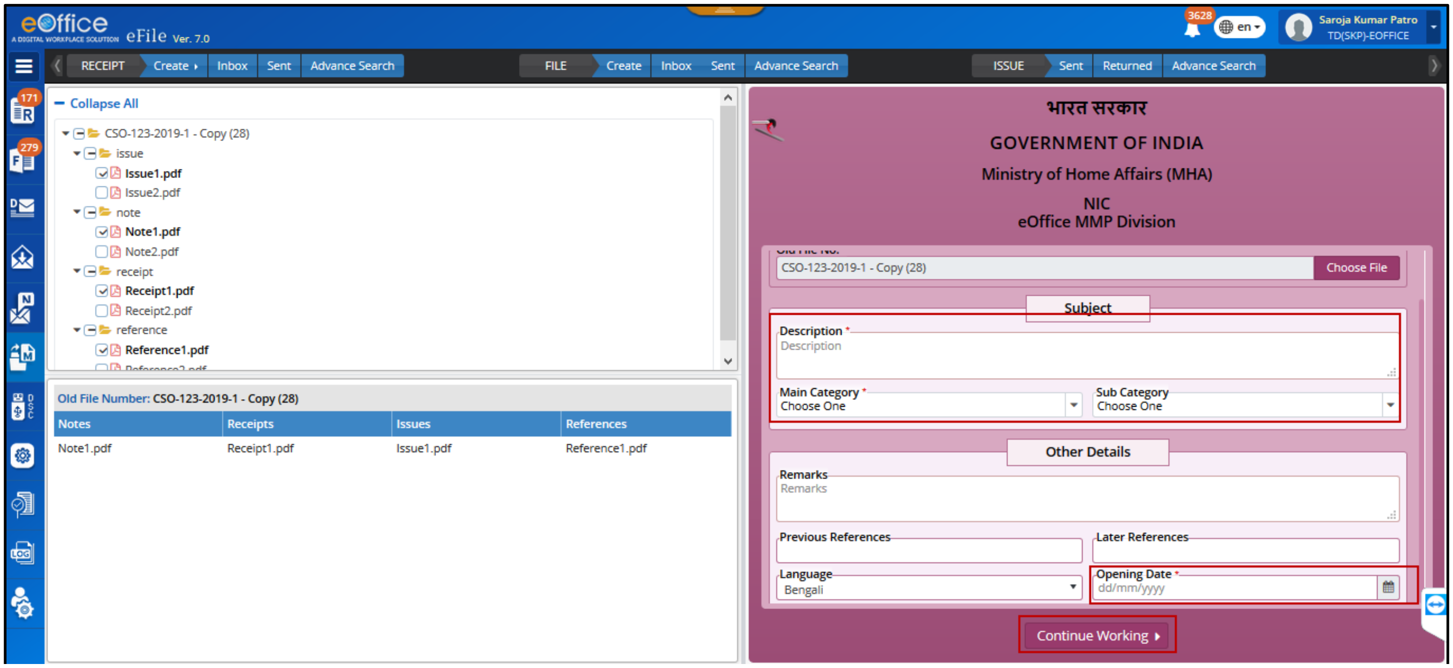


Figure 360

> **Note:**
>
> - Created file will be listed in Created folder under Migrate File module
> - eFile No. once generated cannot be edited.
> - Document like noting/issue/references/receipts uploaded from FTP will be available in the created file.

List of Files Created for Migration

This Feature allow user to view files created for Migration and take actions to Finalize migration process.

STEPS TO FOLLOW:

1. Click **Created** link under Migrate File module.

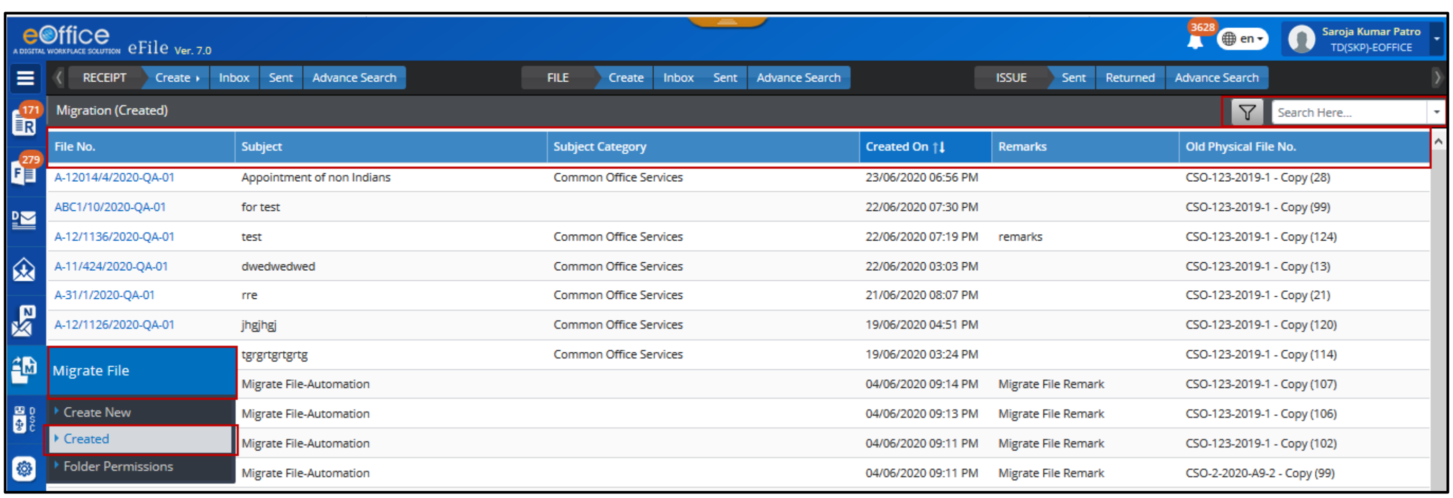


Figure 361

Description:

- List of created files can be **Sorted** based on Created On and Old File No.
- File available in created list can be **Searched** using module search (File No., Subject, Remarks and Old Physical File No.).
- File available in created list can be **filtered** depending on file creation date.

Actions on Migrated Noting

This feature allows User to View and Delete Migrated Noting.

View Noting

STEPS TO FOLLOW:

1. Click **Created** link under Migrate File module (**Figure 361**).
2. Click **File No.** link to open Migrated File Inner Page. (*Clicking* ***Continue Working*** *while creating new migrated file will also open File Inner Page*)
3. Click **Hamburger Icon** on Right Panel (Dropdown will display Noting, Correspondence and References).

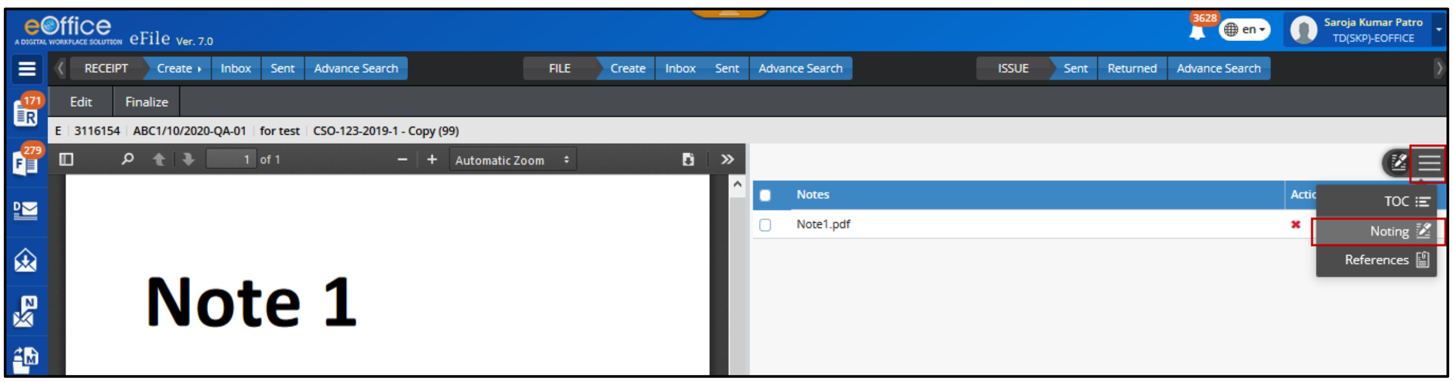


Figure 362

4. Click **Noting**. (*Noting will be displayed on Left panel and its Details on Right Panel of File Inner Page*).

Delete Noting

STEPS TO FOLLOW:

1. Follow steps to **View Noting**.
2. Select **Noting** using checkbox in Right panel of File Inner page.

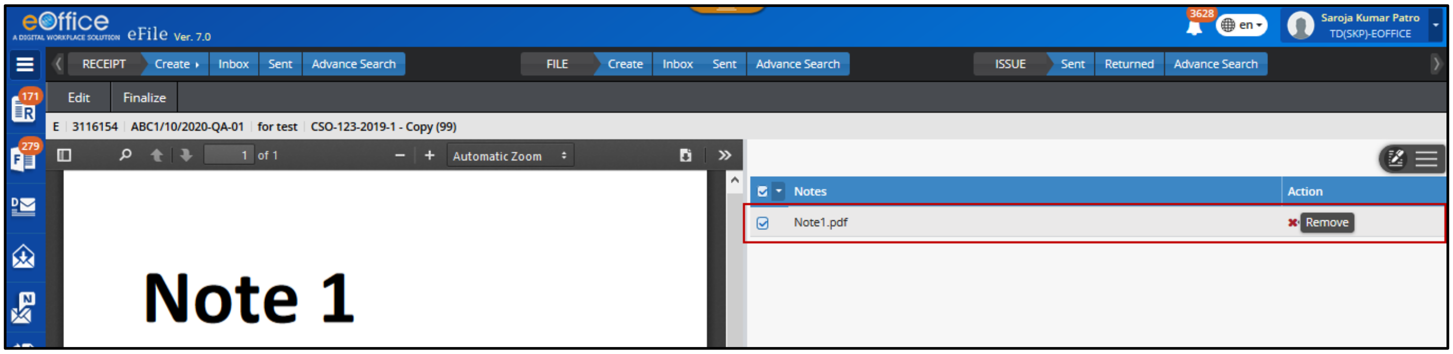


Figure 363

3. Click **Remove** Icon.
4. Click **OK** in Confirmation Popup.

Actions on Migrated Correspondence

This feature allows User to view Migrated Correspondences (Receipt and Issues) on Migrated File inner page and take actions like Generate migrated Receipt/Issues, Move Sequence,Save Sequence and Delete Correspondence can be taken.

Generate Migrated Receipt/Issues and Save Sequence

STEPS TO FOLLOW:

1. Click **Created** link under Migrate File module.
2. Click **File No.** link to open Migrated File Inner Page. (*Clicking **Continue Working** while creating new migrated file will also open File Inner Page*)
3. Click on Create/Edit Receipt or Create/Edit Issue icon for the receipt or issue respectively in ToC.

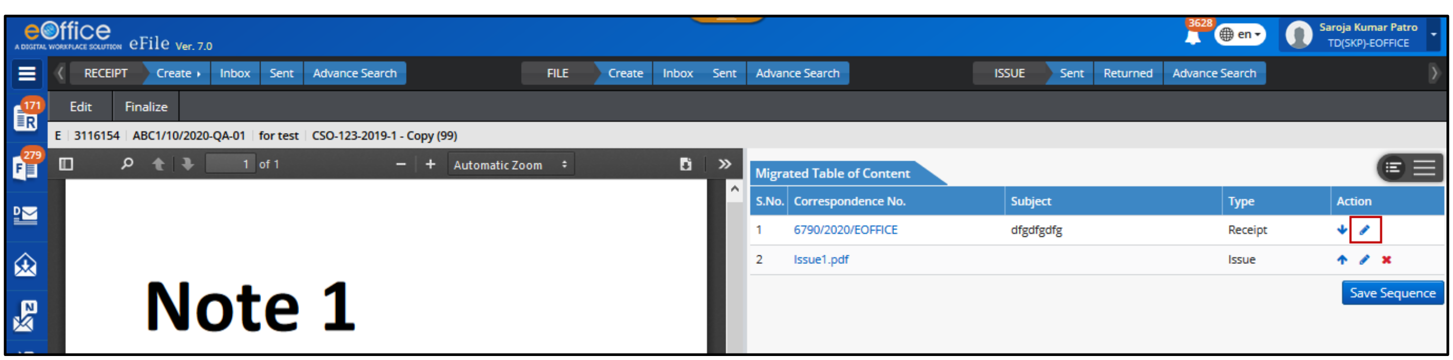


Figure 364

4. Fill required metadata for the Receipt or Issue as per the mapped document.

Note:

- **In Receipt:** All Fields will be same as in Diary Screen (for receipt) with two additional mandatory metadata: **Old Receipt No., Originally Diarised By.**
- **In Issue:** All Fields will be same as in Draft Creation Screen (for Issue) with three additional mandatory metadata: **Old Issue No., Dispatched On, Dispatch Officer.**

5. Click on **Generate** and **Save** for receipt and issue respectively to generate Receipt and Issue Number.

6. Click on **Move Up** and **Move Down** arrow to change the sequence of Receipt and Issue.

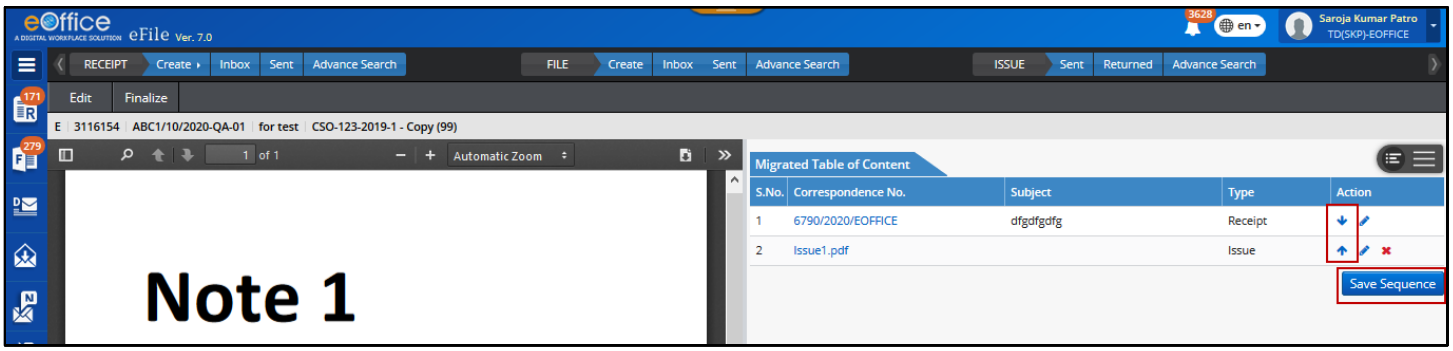


Figure 365

7. Click on **Save Sequence** to save the sequence of receipts and issues.

Note:

- If issue is of Draft Nature Reply, then concerned receipt number should be created first.
- If there are Issue with draft nature as Reminder, then Issue against which reminder is dispatched should be created first.
- Saved sequence of correspondence during migration will be maintained after migration Finalization.

Delete Migrated Correspondence

STEPS TO FOLLOW:

1. Click **Created** link under Migrate File module.

2. Click **File No.** link to open Migrated File Inner Page. (*Clicking **Continue Working** while creating new migrated file will also open File Inner Page*)

3. Click **Remove** Icon.

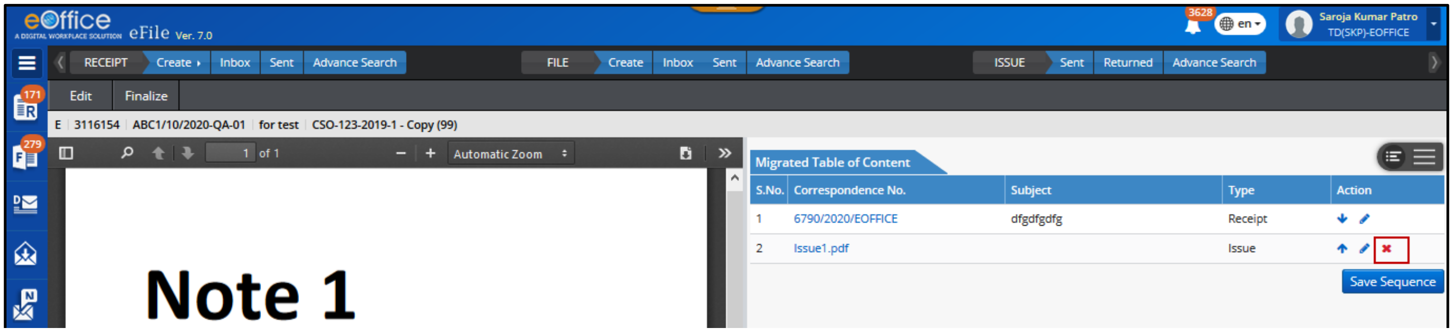


Figure 366

4. Click **OK** in Confirmation Popup.

Actions on Migrated References

This feature allows User to View and Delete Migrated References.

View References

STEPS TO FOLLOW:

1. Click **Created** link under Migrate File module.
2. Click **File No.** link to open Migrated File Inner Page. (*Clicking **Continue Working** while creating new migrated file will also open File Inner Page*)
3. Click **Hamburger Icon** on Right Panel (Dropdown will display Noting, Correspondence and References).

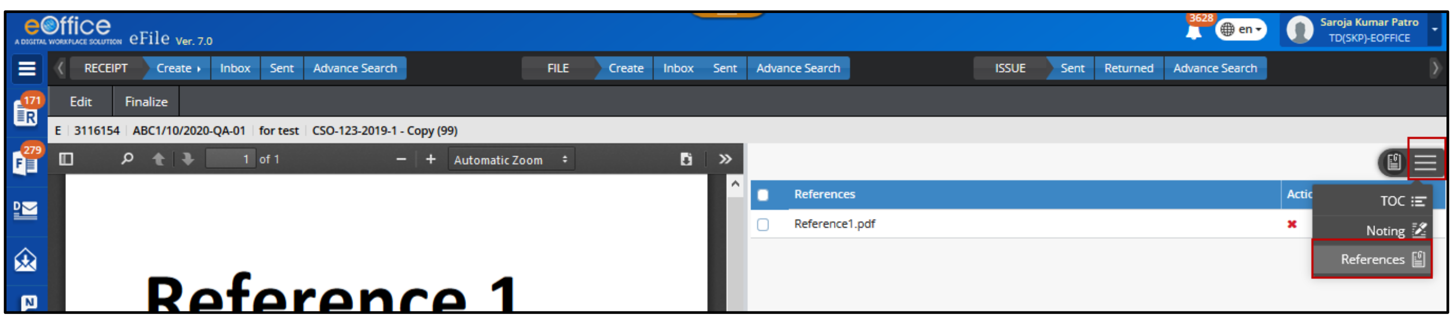


Figure 367

4. Click **References**. (*References will be displayed on Left panel and its Details on Right Panel of File Inner Page*).

Delete References

STEPS TO FOLLOW:

1. Follow steps to View References.
2. Select References using checkbox in Right panel of File Inner page.
3. Click **Remove** Icon.

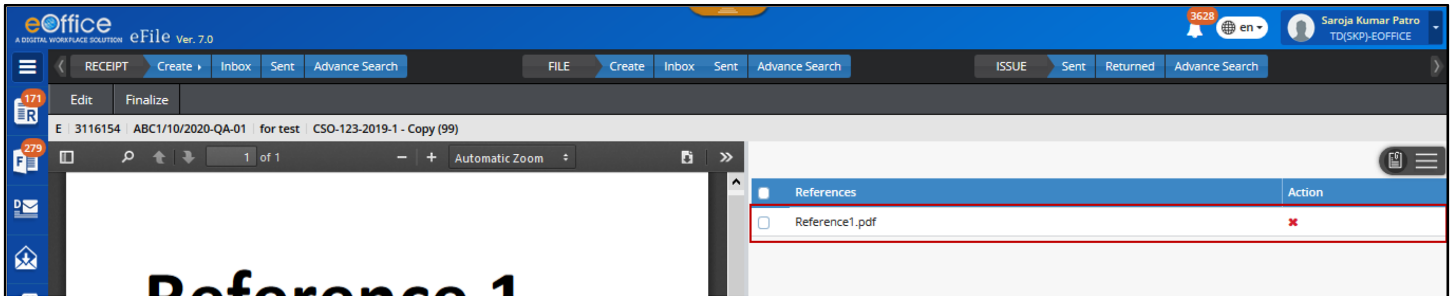


Figure 368

4. Click **OK** in Confirmation Popup.

Edit Migrated File

This feature allows User to Edit Metadata of migrated File (except generated File No.) and Remove or Add additional document by deselecting or selecting them in FTP file folder if required.

Steps to Follow:

1. Click **Created** link under Migrate File module.
2. Click **File No.** link to open Migrated File Inner Page. (*Clicking* ***Continue Working*** *while creating new migrated file will also open File Inner Page*)
3. Click **Edit** menu. (*Displays the document-mapping page with file cover in editable mode*)

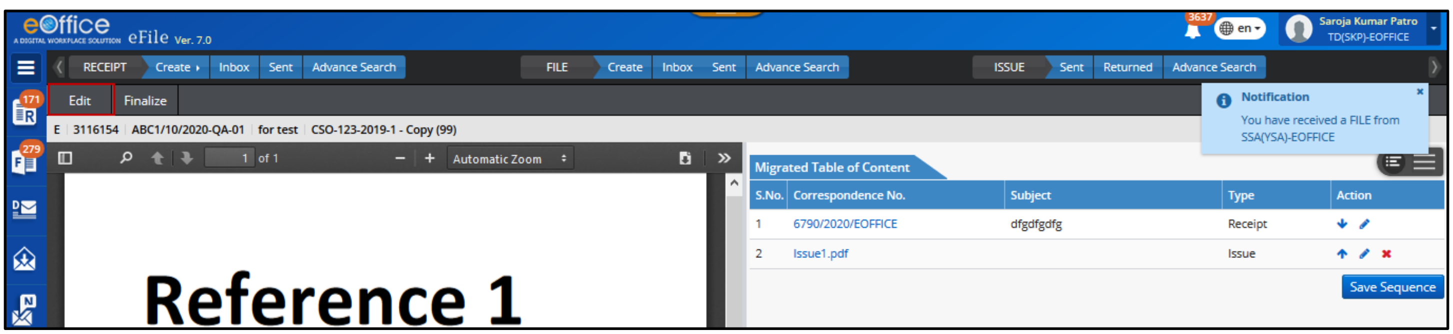


Figure 369

Finalize Migration

This feature allows User to **Finalize** the File Migration process.

Steps to Follow:

1. Click **Created** link under Migrate File module.
2. Click **File No.** link to open Migrated File Inner Page. (Clicking **Continue Working** while creating new migrated file will also open File Inner Page)
3. Click **Finalize** menu.

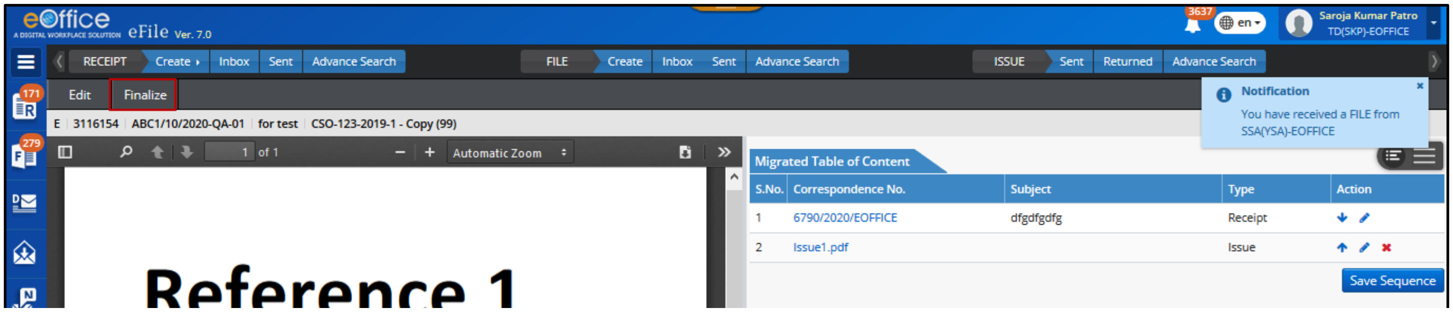


Figure 370

4. Click **OK** in Confirmation Popup.

Note:

- Entry of migrated file will be removed from 'Created' file list under Migration module.
- Migrated File will be displayed in the Created Files list under File module.

Assigning Folder Permission for Migration of Files

This Feature is for User with eFile Admin Role. It allows admin to assign permission to Users to access Folders on FTP server.

Important Points:

- ✓ User must have necessary administrative privileges for accessing required module in eFile.
- ✓ Folders must be available in FTP server.

STEPS TO FOLLOW:

1. Click on **Folder Permissions** link under Migrate File module.

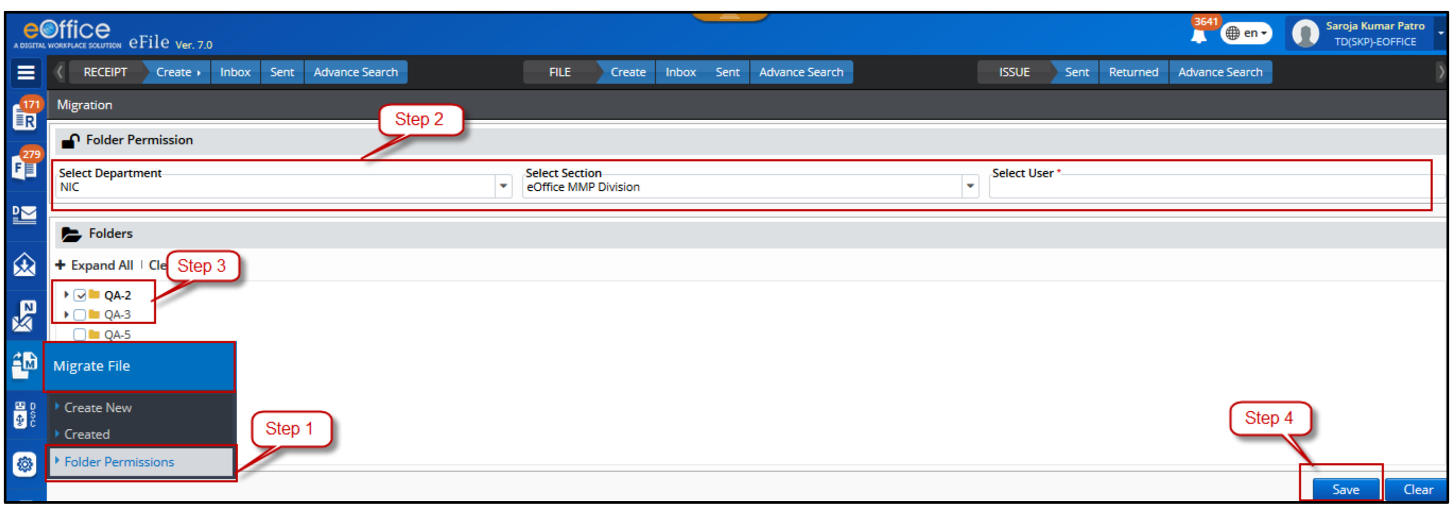


Figure 371

2. Select the section user using 'Department', 'Section' and 'User' searchable combo box.

3. Select the FTP folders to be assigned to the user for migration process.
4. Click **Save** to assign the folders to selected section user.

Note:

- Section user will be able to view the FTP Folders assigned to them and corresponding Files inside the folders.

Received Letters

This module will display letters received from Intra eOffice, Inter eOffice and Mail moved from Email for Diarisation as a Receipt in eFile Module.

Intra eOffice

This feature allows user to view and diaries letters received from Intra eOffice (*Department within same eFile Instance*) as a Receipt in eFile Module.

STEPS TO FOLLOW:

1. Click Intra eOffice link under **'Received Letters'** module.

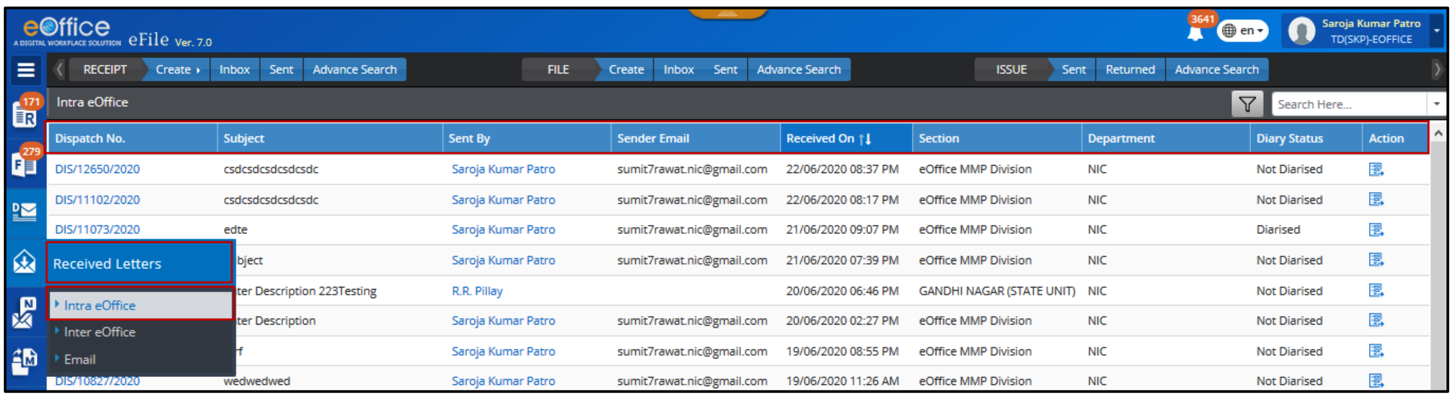


Figure 372

List of Received Letters from Intra eOffice:

- Received letter can be viewed in a popup window (PDF format) by clicking on **Dispatch No.**

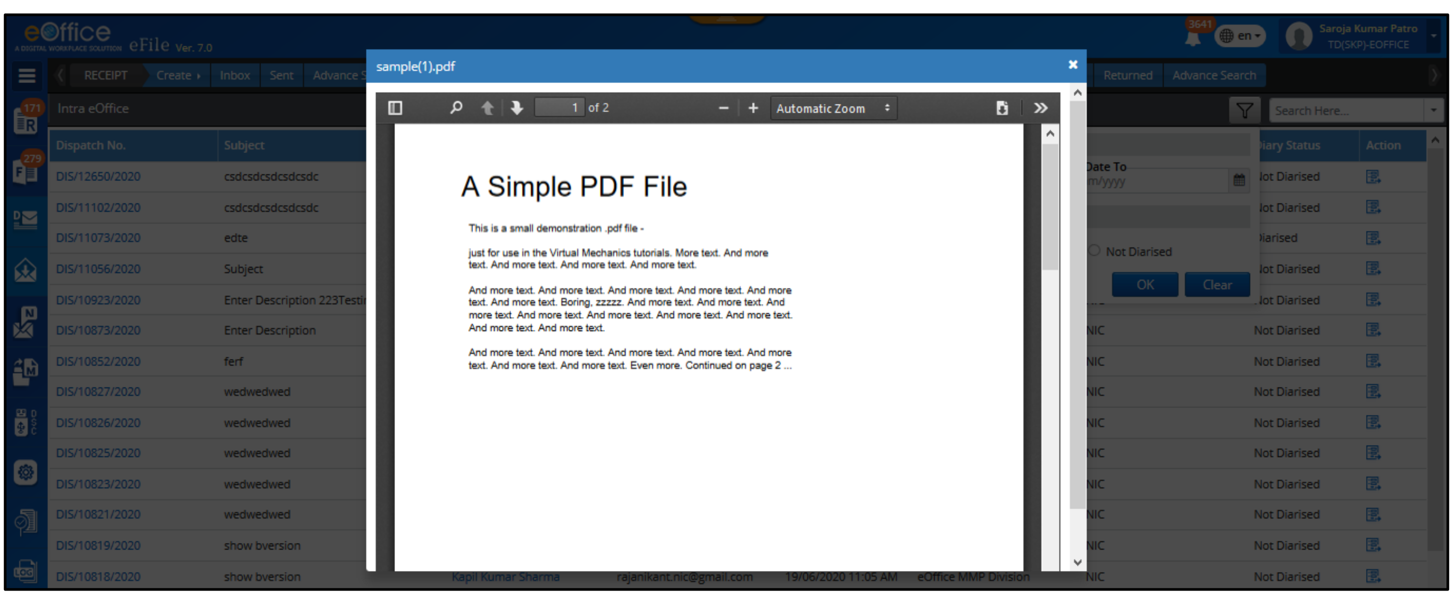


Figure 373

- List of Received Letters can be **Sorted** based on Sent On date.

- Received Letters available in list can be **Searched** using module search (Dispatch No., Sender Email, Sent By, Subject, Section and Department).

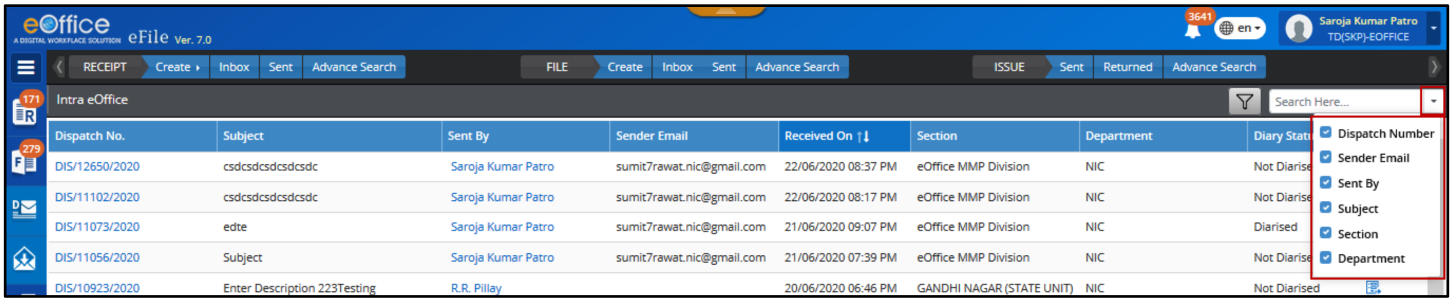


Figure 374

- Received Letters available in list can be **Filtered** depending **Sent on** Date and **Status** (Diarised/ Not Diarised/ Both)

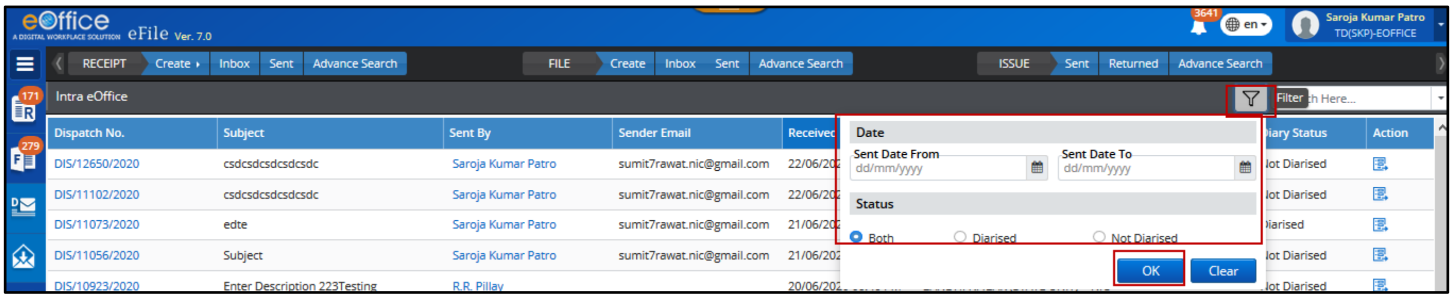


Figure 375

Diarise Received Letter

STEPS TO FOLLOW:

1. Click **Diarise** Icon for dispatch in the Intra eOffice Received Letters list.

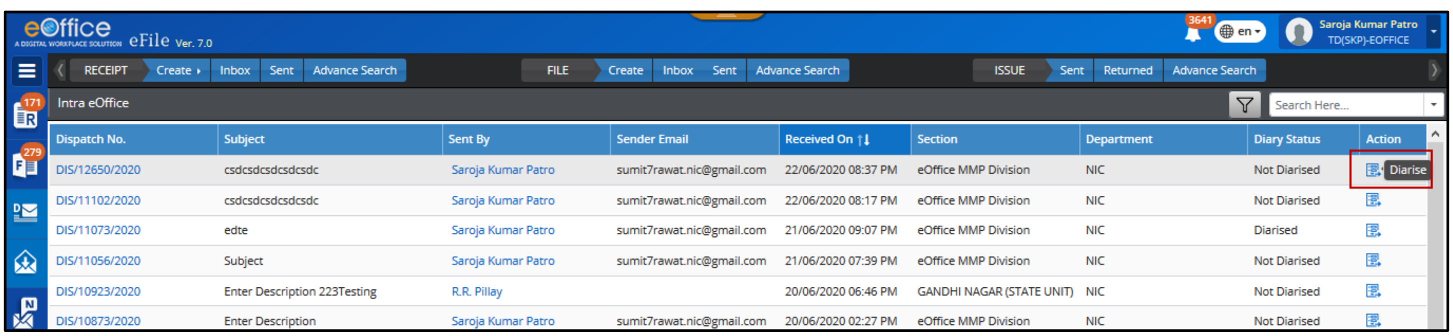


Figure 376

2. Click **Upload** action button to select PDF files from local system. (*If Required*)

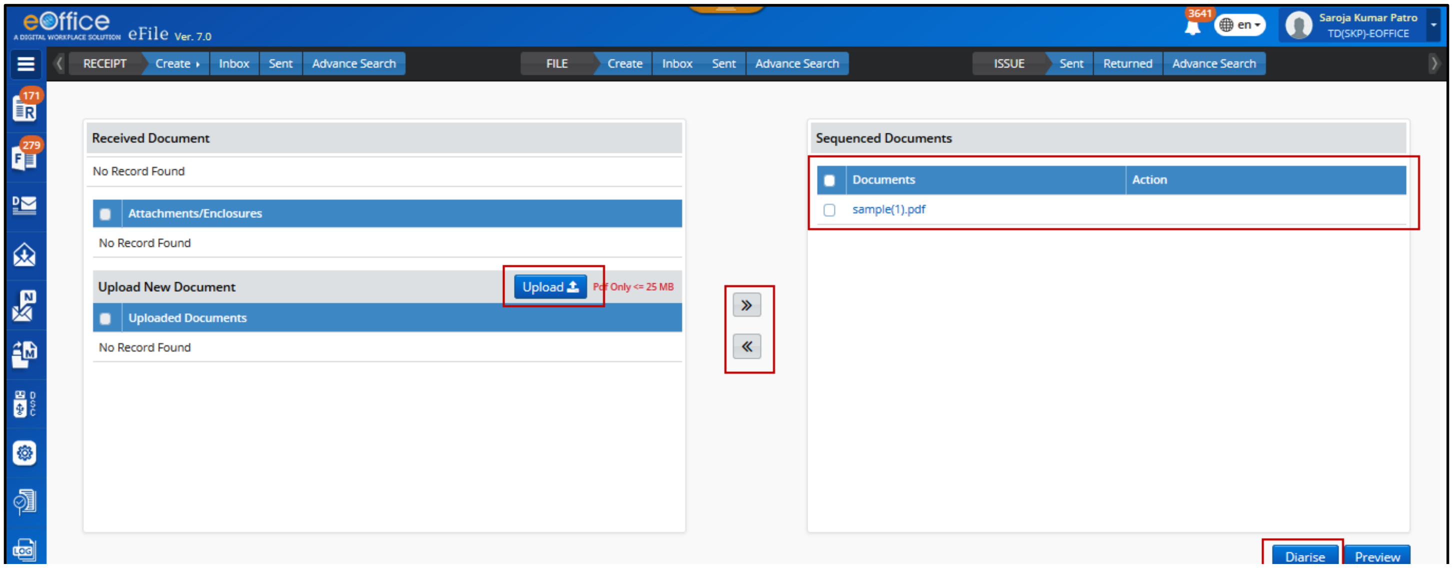


Figure 377

3. **Move** dispatch content, PDF attachment and Uploaded document for merging into a single document (PDF) required for receipt Diarisation.
4. Click **Preview** to view and verify the merged PDF.
5. Click **Diarise** to open electronic receipt Diarisation page. (*PDF will be auto populated*)
6. Follow the diary process as mentioned in Electronic Receipt Diarisation to create electronic receipt.

Note:

- **Diary Status** column in Intra eOffice Received Letter list will be updated to **Diarised** for records that are already Diarised
- Newly created receipt should be displayed in Created folder in Receipt Module.

Inter eOffice

This feature allows user to view and diaries letters received from Inter eOffice (*Department from other eFile Instance*) as a Receipt in eFile Module.

STEPS TO FOLLOW:

1. Click Inter eOffice link under **'Received Letters'** module.

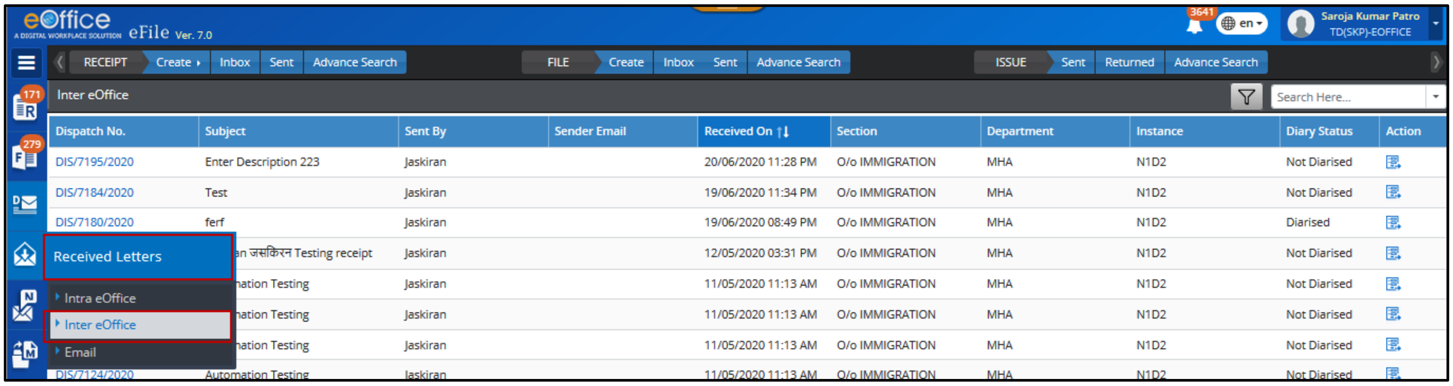


Figure 378

List of Received Letters from Inter eOffice:

- Received letter can be viewed in a popup window (PDF format) by clicking on **Dispatch No.**
- List of Received Letters can be **Sorted** based on Sent On date.
- Received Letters available in list can be **Searched** using module search (Dispatch No., Sender Email, Sent By, Subject, Section, Department and Instance).

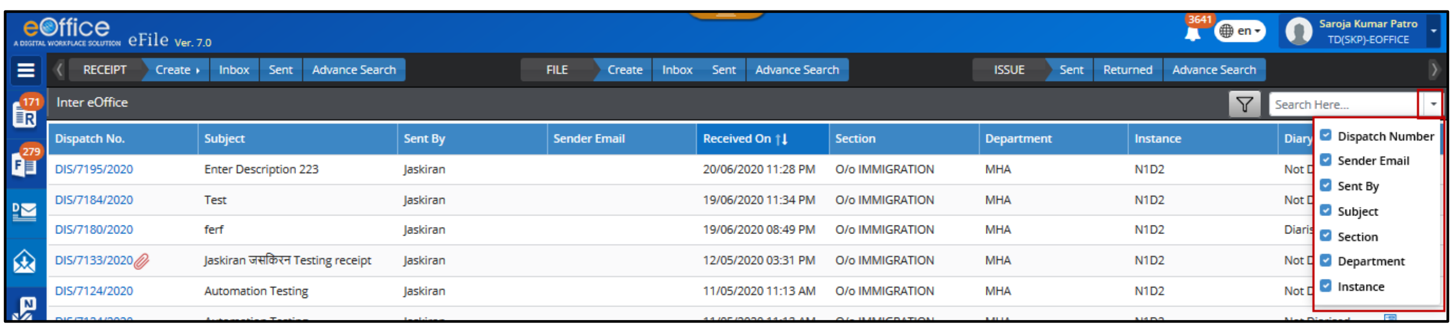


Figure 379

- Received Letters available in list can be **Filtered** depending **Sent on** Date and **Status** (Diarised/ Not Diarised/ Both)

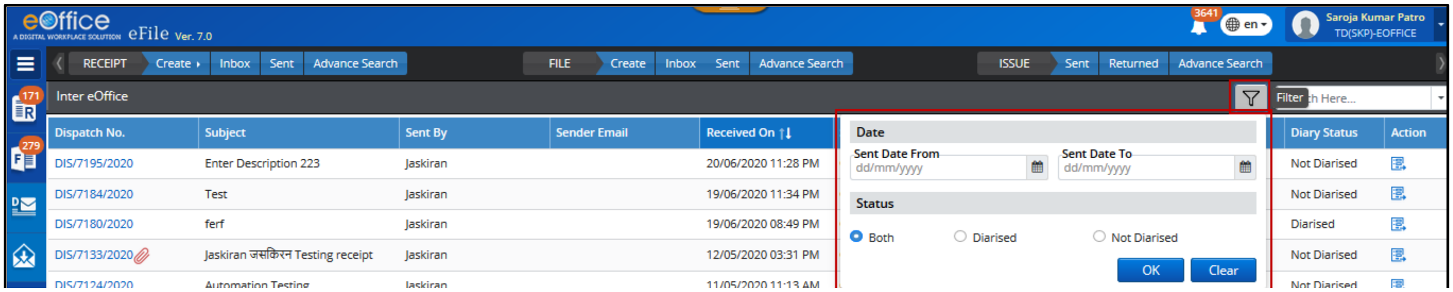
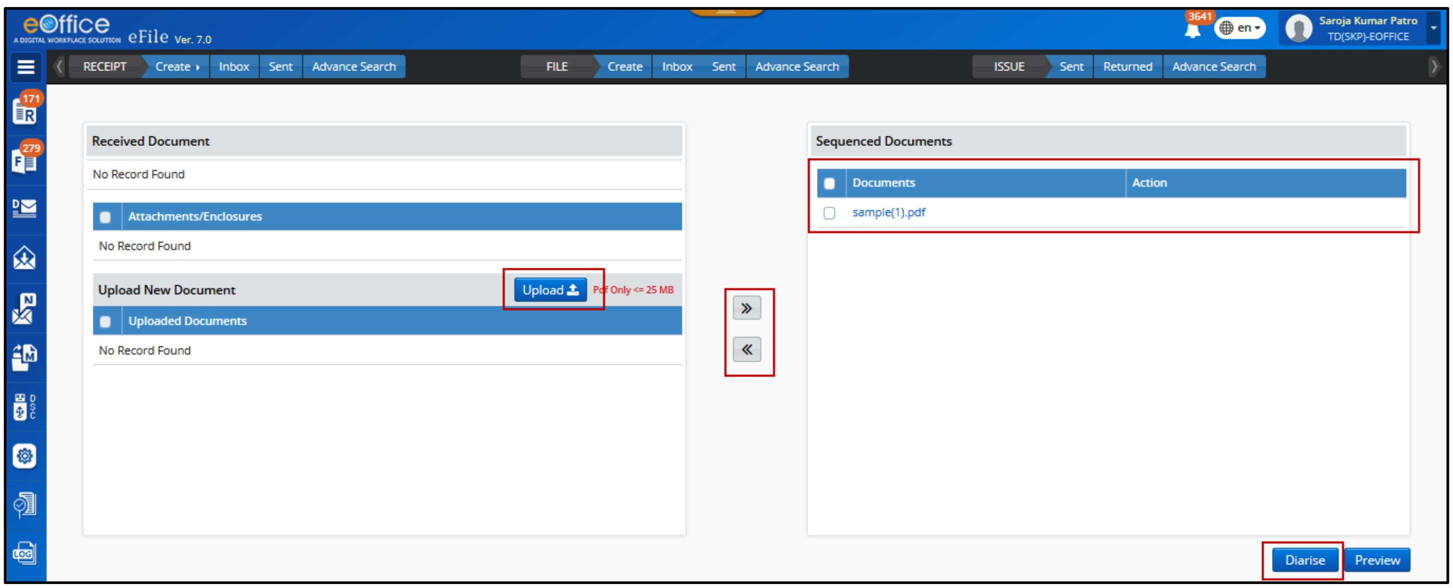


Figure 380

Diarise Received Letter

STEPS TO FOLLOW:

1. Click **Diarise** Icon for dispatch in the Inter eOffice Received Letters list.
2. Click **Upload** action button to select PDF files from local system. (*If Required*)



3. **Move** dispatch content, PDF attachment and Uploaded document for merging into a single document (PDF) required for receipt Diarisation.
4. Click **Preview** to view and verify the merged PDF.
5. Click **Diarise** to open electronic receipt Diarisation page (*PDF will be auto populated*).
6. Follow the diary process as mentioned in Electronic Receipt Diarisation to create electronic receipt.

Note:

- **Diary Status** column in Intra eOffice Received Letter list will be updated to **Diarised** for records that are already Diarised
- Newly created receipt should be displayed in Created folder in Receipt Module.

Email

This feature allows user to view and diaries Email moved to eFile from eOffice Mail diarisation Module as a Receipt in eFile Module.

STEPS TO FOLLOW:

1. Click **Email** link under **'Received Letters'** module.

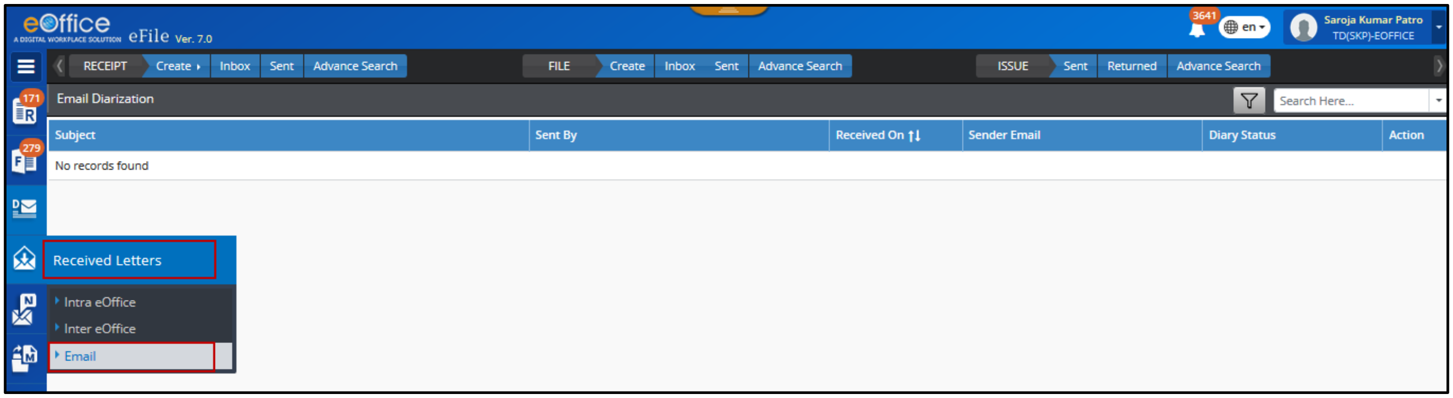


Figure 381

List of Email moved for Receipt Diarisation:

- List of Email can be **Sorted** based on Sent On date.
- Email available in list can be **Searched** using module search (Subject, Sender Email and Sent By).

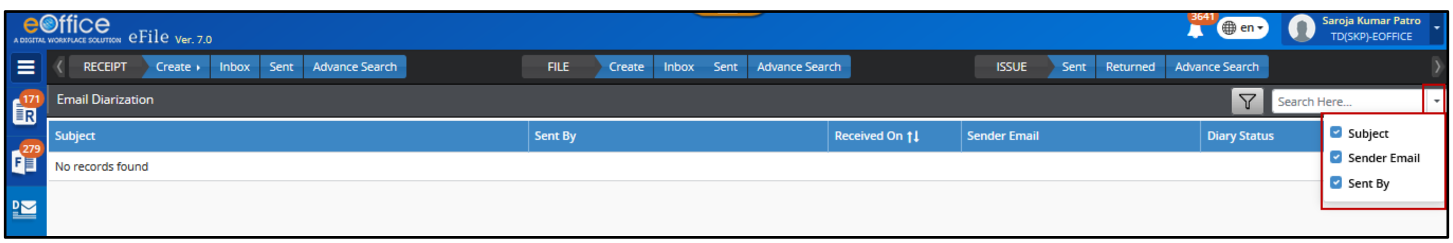


Figure 382

- Email available in list can be **Filtered** depending **Sent on** Date and **Status** (Diarised/ Not Diarised/ Both)

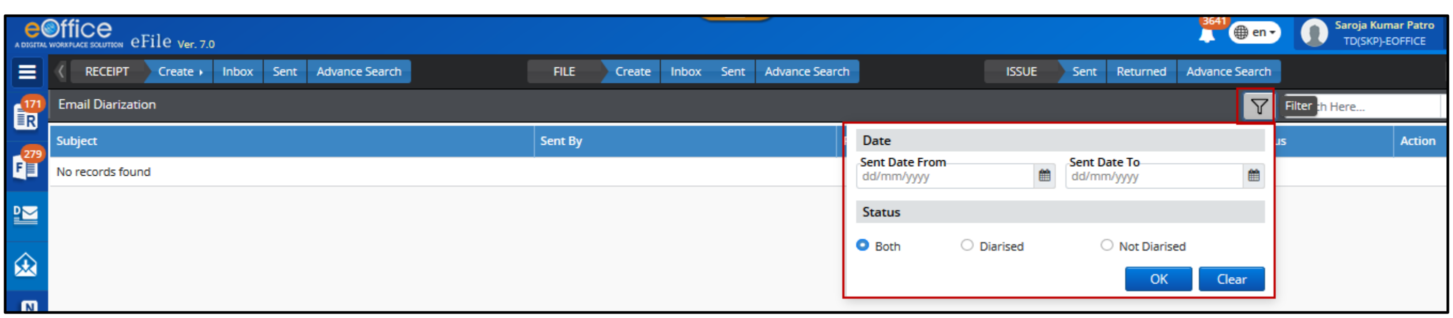


Figure 383

Diarise Email

STEPS TO FOLLOW:

1. Click **Diarise** Icon for an Email in the moved Email list.
2. Click **Browse and Upload** to select PDF files from local system. (If Required)

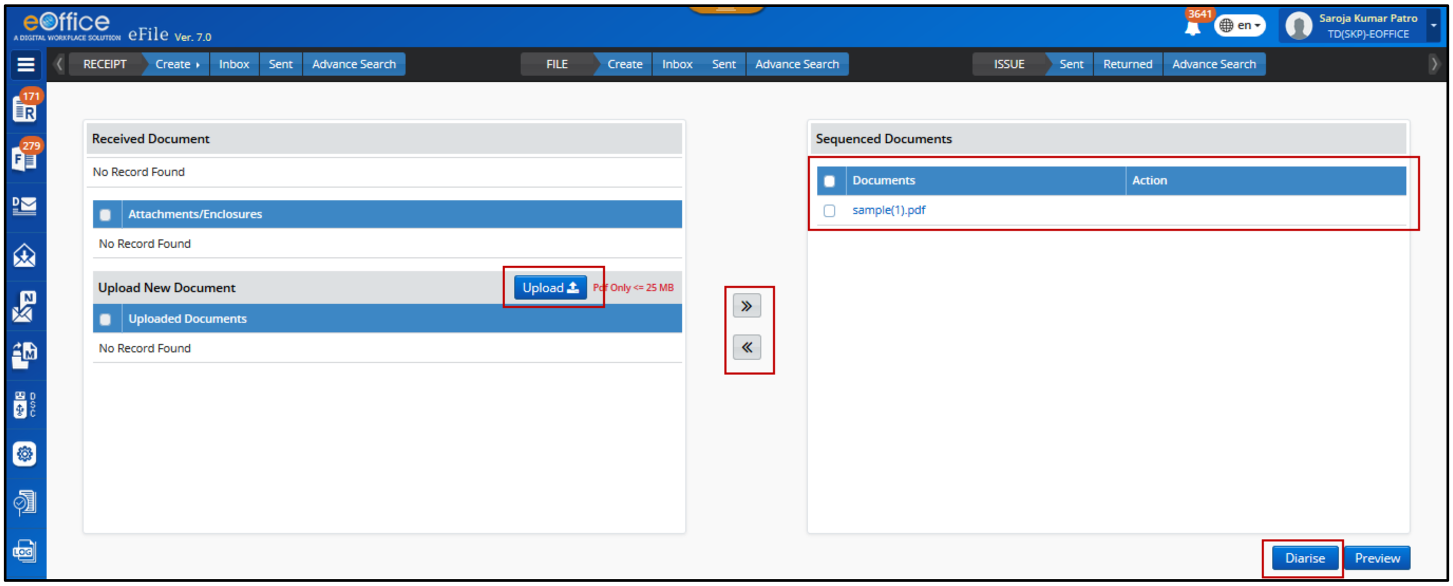


Figure 384

3. **Move** dispatch content, PDF attachment and Uploaded document for merging into a single document (PDF) required for receipt Diarisation.
4. Click **Preview** to view and verify the merged PDF.
5. Click **Diarise** to open electronic receipt Diarisation page. (*PDF will be auto populated*)
6. Follow the diary process as mentioned in Electronic Receipt Diarisation to create electronic receipt.

Note:

- **Diary Status** column in Intra eOffice Received Letter list will be updated to **Diarised** for records that are already Diarised
- Newly created receipt should be displayed in Created folder in Receipt Module.

Dispatch (Officer)

This module is available to only the users who usually all dealing hands and officers except users working in Central Registry Unit. This module keeps the record of the Issues and acknowledgements dispatched by Self/CRU or pending for dispatch to be made by CRU.

Dispatched Acknowledgement

The '**Acknowledgment'** sub-module under Dispatch module comprises of the list of acknowledgement sent for dispatch to CRU or has been dispatched by CRU or Self. It is mainly divided into –

1. **Sent/Dispatched**
2. **Returned**

List of Acknowledgment Dispatched/Sent for Dispatch

This section describes the steps to view the list of acknowledgements dispatched or are pending for dispatch.

STEPS TO FOLLOW:

1. Under **Dispatch** module, click on **Acknowledgement**.
2. Click **Sent/Dispatched**.

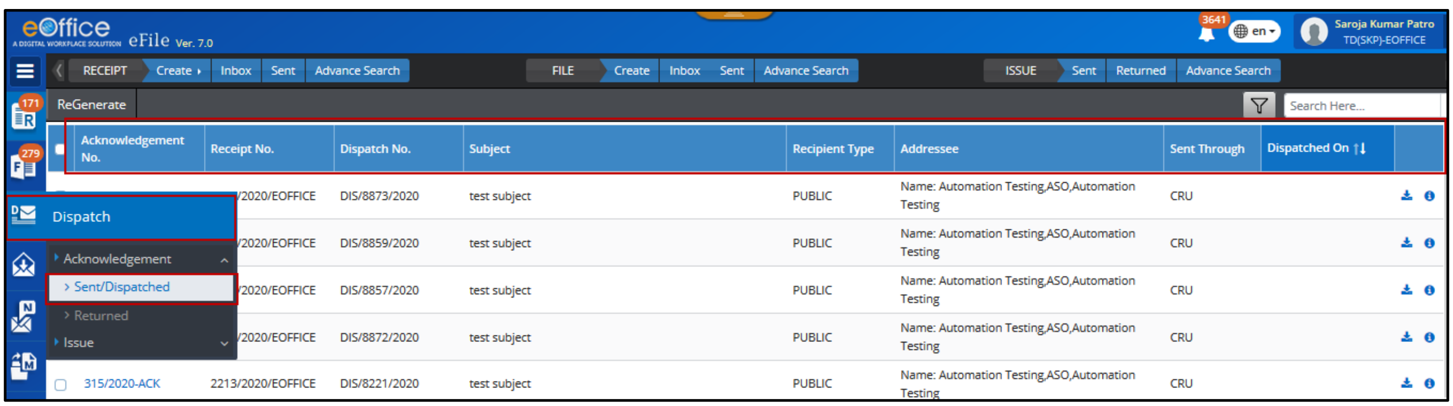


Figure 385

The user can now see the list of acknowledgements dispatched or dispatch in process. The following information is available –

1. **Acknowledgement number:** The unique no. of the acknowledgement no. against which dispatch is made/in process.
2. **Receipt No.:** The receipt no. against which the acknowledgement is prepared.
3. **Dispatch No.:** The unique number generated for different dispatches against the acknowledgement.
4. **Subject:** The subject of the acknowledgement letter.

5. **Recipient Type:** The type of the recipient, Public (if sent in public domain), Internal (if issued within department), External (if dispatched to other organization(s) as eOffice to eOffice platform).
6. **Addressee:** The recipient details of the acknowledgement.
7. **Sent Through:** The 'Dispatch By' – 'SELF' or 'CRU' mode.
8. **Dispatched On:** The date on which the dispatch is made to the recipient of the acknowledgement.

Note:

- The blank **'Dispatched on'** date denotes that the dispatch is still pending at CRU end.
- User may click on the acknowledgement number to check the acknowledgement letter and its associated details.

Regenerate Acknowledgement

Regenerating an acknowledgement is the re-issuance of the acknowledgement with some modification in the content and/or the recipient details required in case scenarios when,

- The acknowledgement has to be sent again in case the intended recipient informs of not receiving the acknowledgement (Incorrect communication details could be a reason)
- The acknowledgement is to be sent to some more recipients.

STEPS TO FOLLOW:

1. Click **Dispatch→Acknowledgement→Sent/Dispatched**.
2. Select the required **Dispatch**.
3. Click on **Regenerate**.

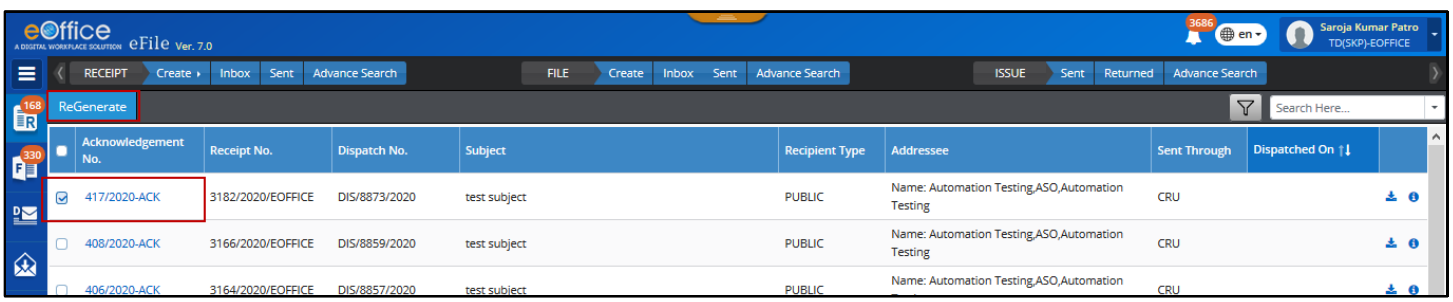


Figure 386

4. Edit the content of the acknowledgement (if required).
5. Click on **Continue**.

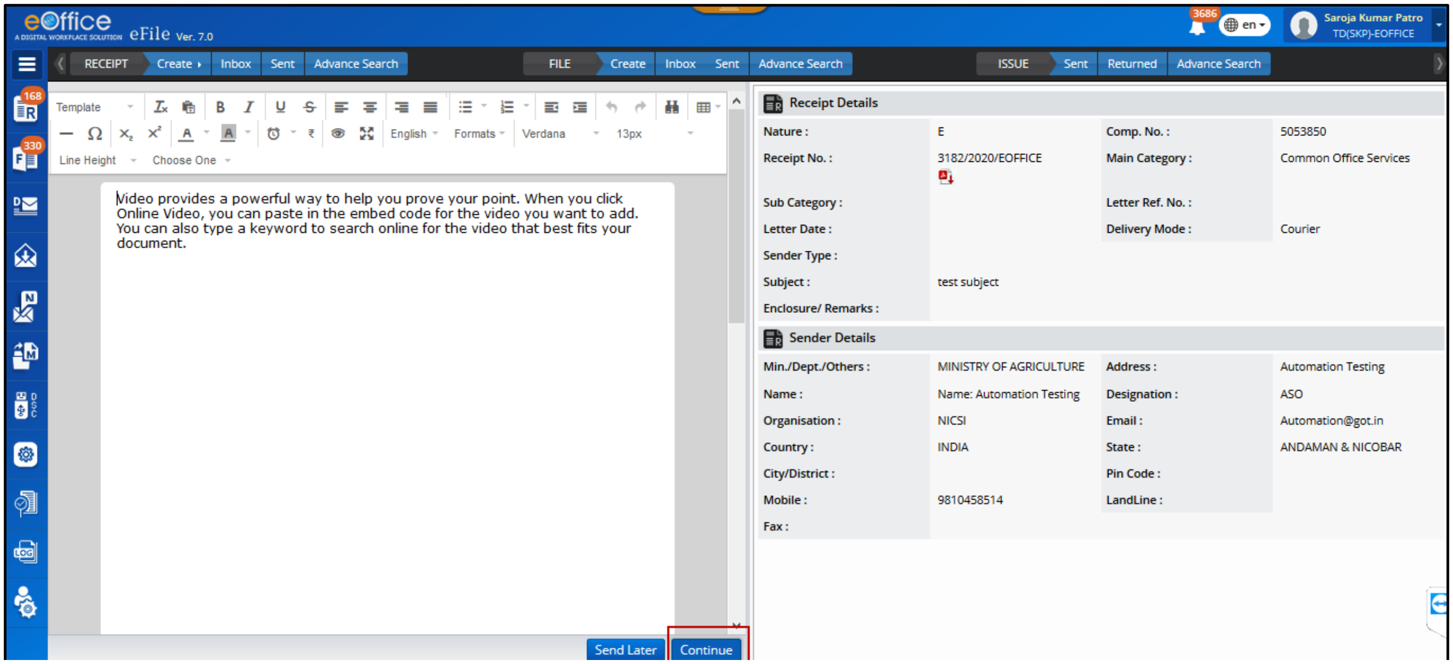


Figure 387

Note:

- Refer article for ‘Steps to Sign an acknowledgement.
- Refer article for Steps to Dispatchan acknowledgement.

Download Acknowledgement Letter

This section describes the steps to download a copy of the acknowledgement letter.

STEPS TO FOLLOW:

1. Click **Dispatch→Acknowledgement→Sent/Dispatched**.
2. Click on **Download Acknowledgement** icon against the required acknowledgement.

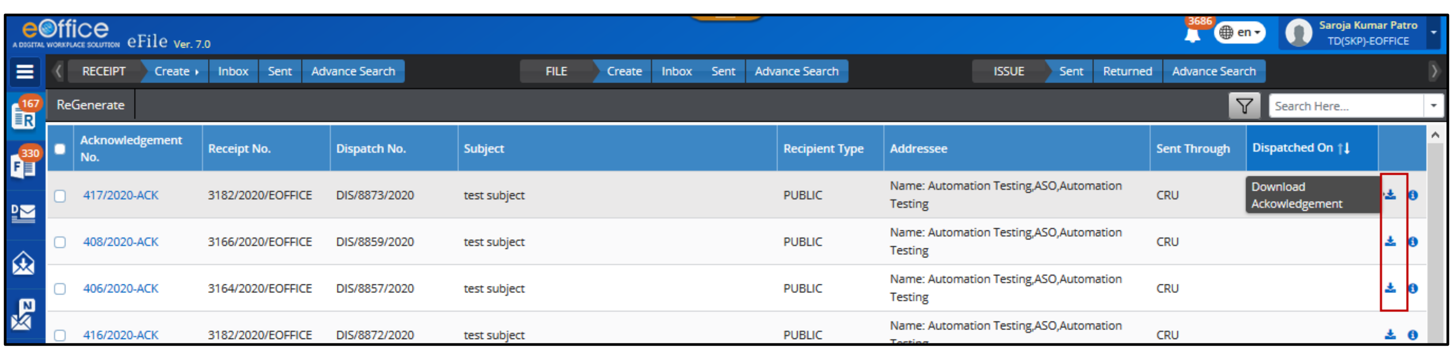


Figure 388

Note:

- The acknowledgement will be downloaded to system in ‘PDF’ format.

View Dispatch Details

The dispatch details are maintained individually against every dispatch request. The detail section is divided into following two tabs –

- **Basic Details** – It displays –

  a) **Dispatch details** – Details of dispatch such as dispatch no., dispatch sent by, date sent on, Dispatch by, Delivery mode, and etc.

  b) **Communication details** – Communication details of the addressee.

  c) **Postal Details** – The postal details recorded by CRU/User if sent by post media.

- **Action Details** – These are the details of the actions on the dispatch taken after it is dispatched or sent for dispatch. The Dispatch by Self or CRU details recorded with dispatch date and remarks. In case the dispatch is returned by the CRU for further clarification, the movement of return from CRU and Resend by user with remarks also recorded here.

STEPS TO FOLLOW:

1. Under Dispatch module, click Acknowledgement and then click Sent/Dispatched or Returned.

2. Click **Details** icon against the required acknowledgement.

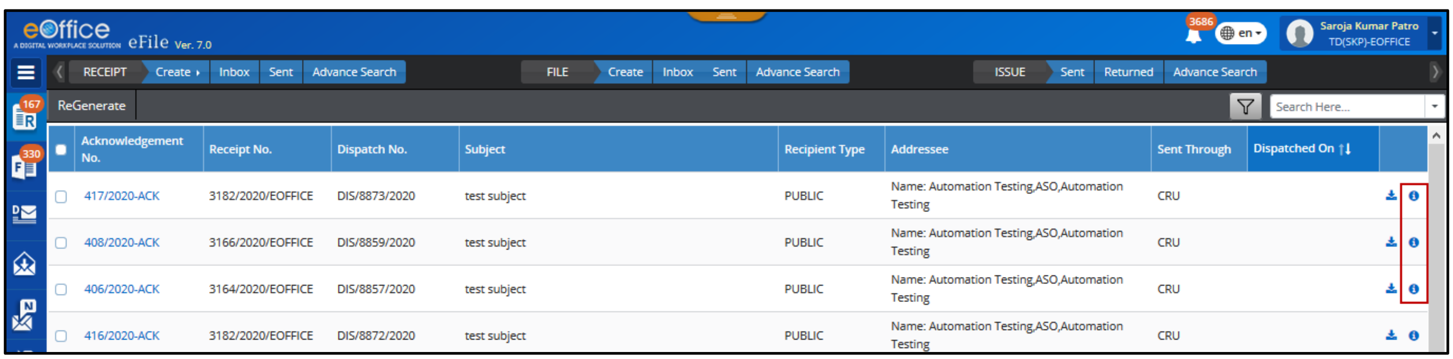


Figure 389

Acknowledgment Returned by CRU

This list of returned dispatches are those dispatch requests made to CRU against the acknowledgements and are returned seeking for further clarification for dispatch to complete. It is expected that the user may check the remarks submitted by CRU and provide the necessary clarification. This list can be checked by –

STEPS TO FOLLOW:

1. Under **Dispatch** module, click **Acknowledgement**.
2. Click **Returned**.

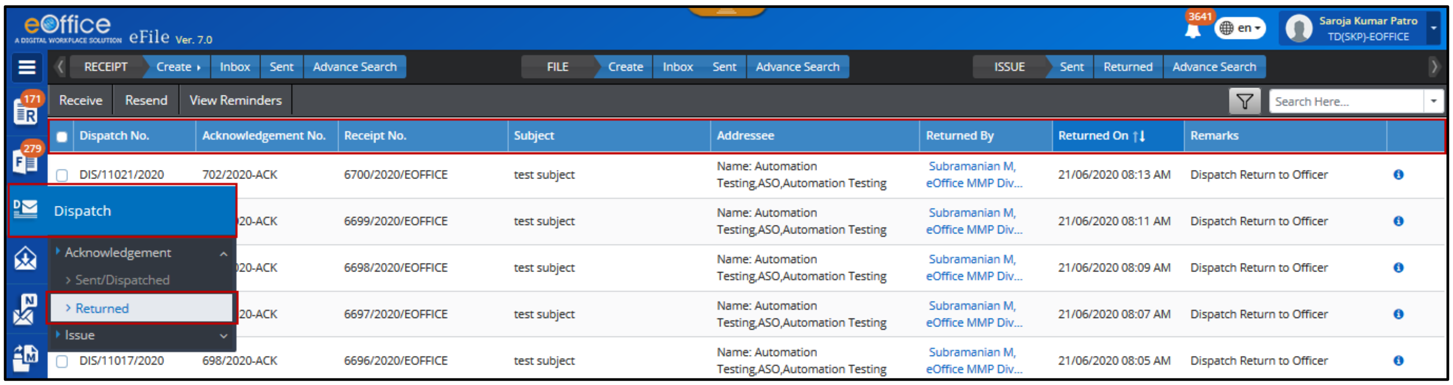


Figure 390

The user can now see the list of dispatches against acknowledgement returned by the CRU. The following information is available

1. **Nature:** The nature of the acknowledgement, Physical (P) / Electronic (E).
2. **Dispatch No.:** The unique number generated for different dispatches for various recipients of the acknowledgement letter.
3. **Acknowledgement No.:** The acknowledgement no. against which the dispatch is made.
4. **Receipt No.:** The unique number of the receipt against which acknowledgement is generated.
5. **Subject:** The subject of the acknowledgement letter.
6. **Addressee:** The recipient details of the dispatch.
7. **Returned By:** The name of the CRU who has returned the dispatch request against acknowledgement.
8. **Returned On:** The date and time on which the dispatch request is returned.
9. **Remarks:** The remarks submitted by CRU seeking some clarification on the dispatch.

Resend the Acknowledgement Dispatch Request Returned by CRU

After checking the necessary remarks against the dispatch returned by CRU, the user may resend it back for dispatch by adding/editing some communication details of the intended recipient, for example, if the pin code was found to be incorrect hence unable to make postal dispatch. Or CRU may simply ask for some clarification which can be submitted as remarks.

STEPS TO FOLLOW:

1. Click **Dispatch→Acknowledgement→Returned.**

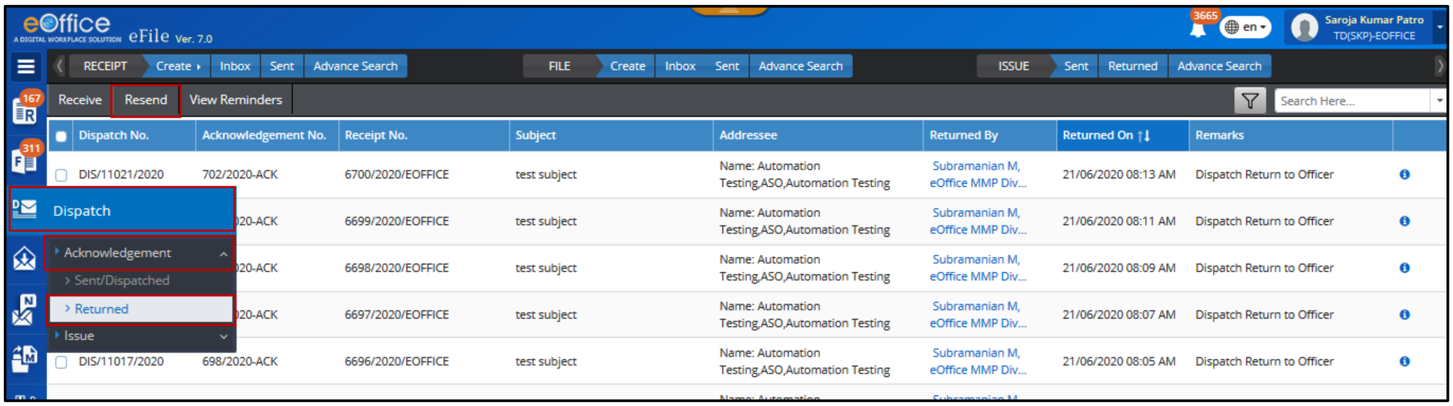


Figure 391

2. Select the required **'Dispatch'**.
3. Click **'Receive'**. (*In case, it is in an unreceived state*)

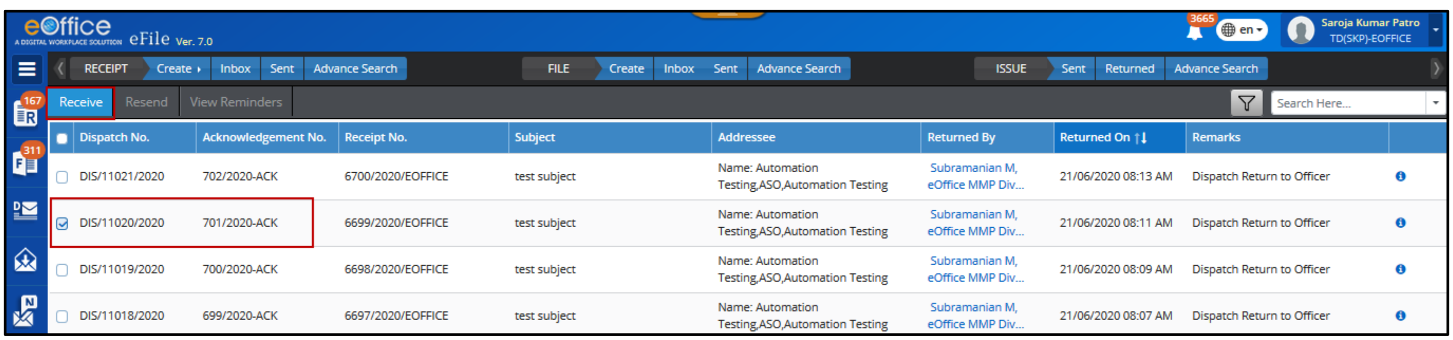


Figure 392

4. Click **'Dispatch number'** to edit the recipient details (if required).
5. Click '**Save'**. (*Click **Save and Send** to directly resend dispatch from edit page*)

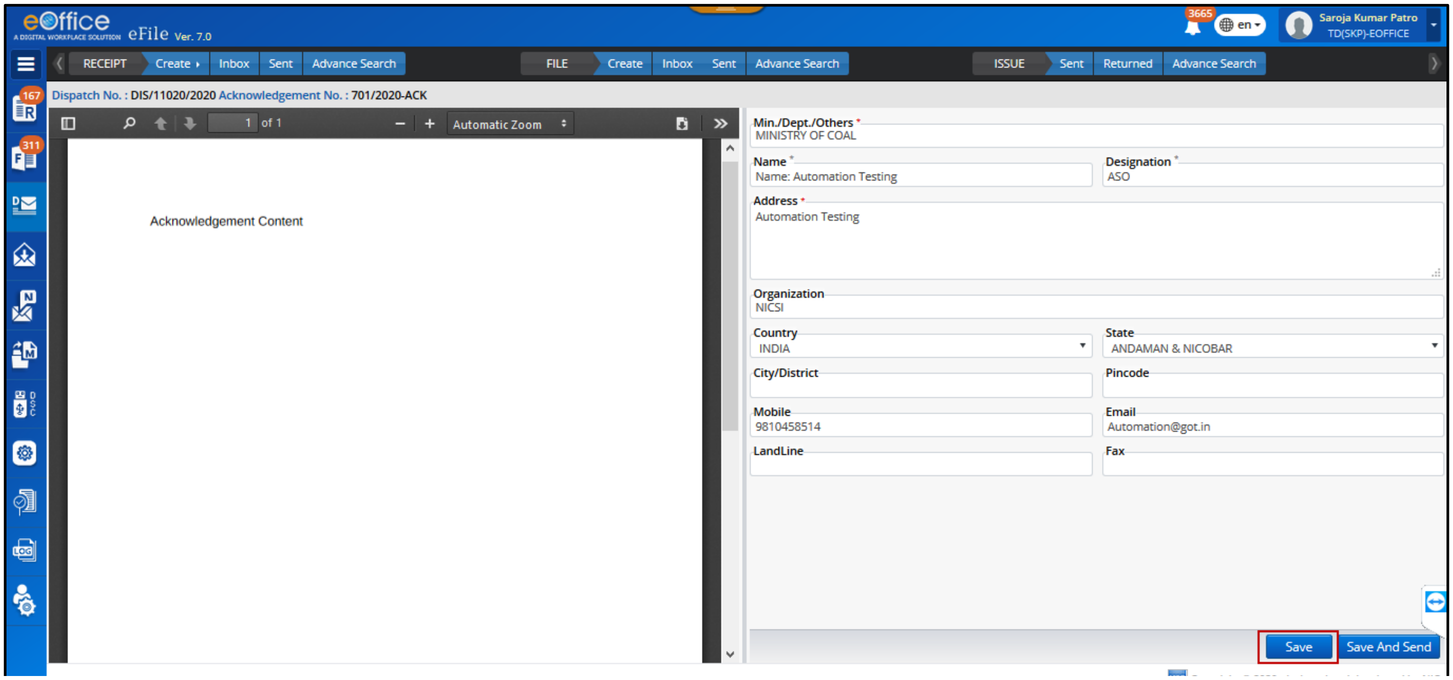


Figure 393

6. From the returned list, select the **'Dispatch'** and click on **'Resend'**.

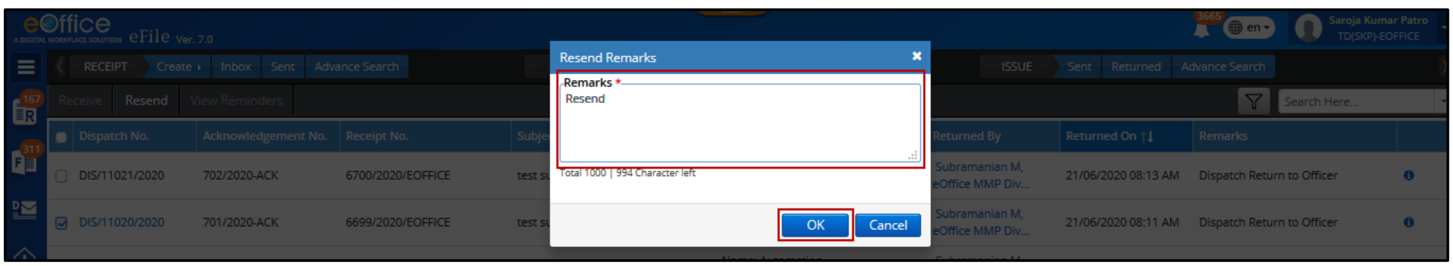


Figure 394

7. Enter the mandatory Remarks in the pop-up box and click **'OK'** to 'resend.

Dispatched Issue

After an Issue is sent for dispatch, it's sent details are maintained in under 'Issue' section of 'Dispatch module. This section consists of –

- **Sent/Dispatched** – List of Issues sent for dispatched via CRU or already dispatched by the User/Officer.
- **Returned** – The list of issues returned by the CRU in case of any more clarity is requested before dispatching.

A user can check the number of dispatches made against an ISSUE and further the recipient's and dispatch mode details. If required, an Issue can also be re-dispatched.

View List of Issues Sent/Dispatched

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Sent/Dispatched'.**

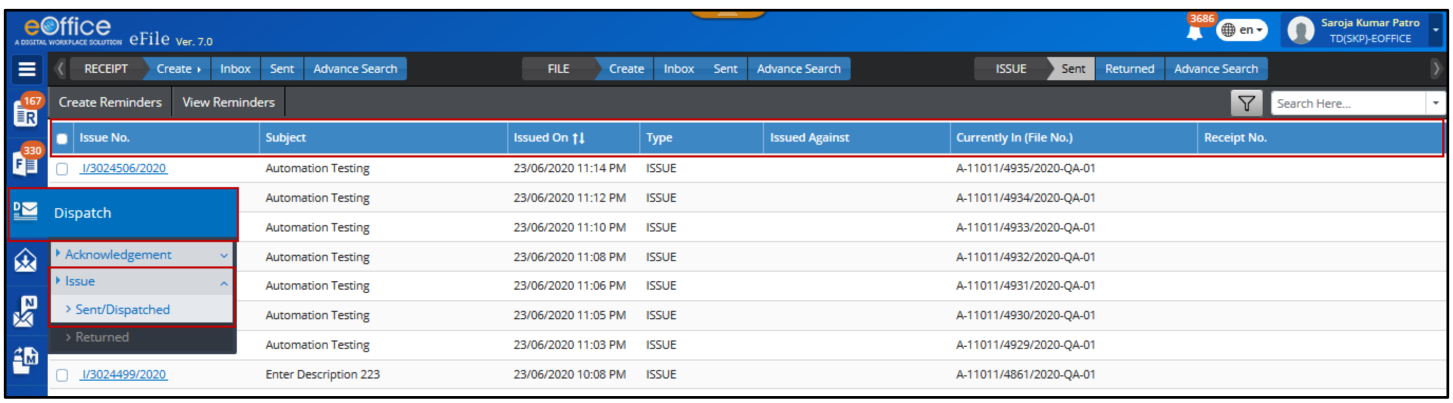


Figure 395

The user can now see the list of dispatches sent to the addressees/recipients. The following information is available-

1. **Nature:** The nature of the ISSUE, Physical (P) / Electronic (E).
2. **Issue number:** The unique number of the ISSUE sent for dispatch.
3. **Subject:** The subject of the ISSUE letter sent for dispatch.
4. **Issued On:** The date on which the is the issue letter was sent for dispatch
5. **Type:** The type of the issue whether it is an ISSUE or REMINDER to an ISSUE.
6. **Issued Against:** The ISSUE number against which the reminder has been issued.
7. **Currently In (File No.):** The File number from which the ISSUE has been generated.
8. **Receipt No.:** The Receipt number against which the ISSUE has been generated.

View Issue Details

STEPS TO FOLLOW:

1. Under **Dispatch** module, click on **Issue**.
2. Click **Sent/Dispatched.**
3. Click **Issue No.**

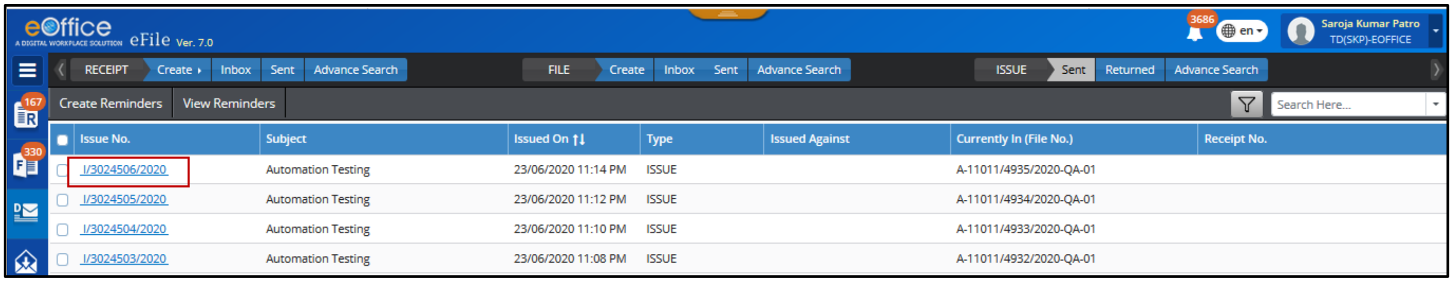


Figure 396

Note:

- Use **'Filter'** (to filter by issue date filter range and type) and/or **'Search'** to search for required Issue.

The user can now see –

- The **Issue letter** on the left side of the screen (in case of electronic nature only).
- **Issue Details** such as **Issued By, Issued On, Type, Subject, Issued Against**, etc.
- **Dispatch Recipient Details** - The list of various recipients to which the ISSUE letter has been dispatched, Dispatch number, Sent Through (CRU/Self) and the Status of the Dispatch.

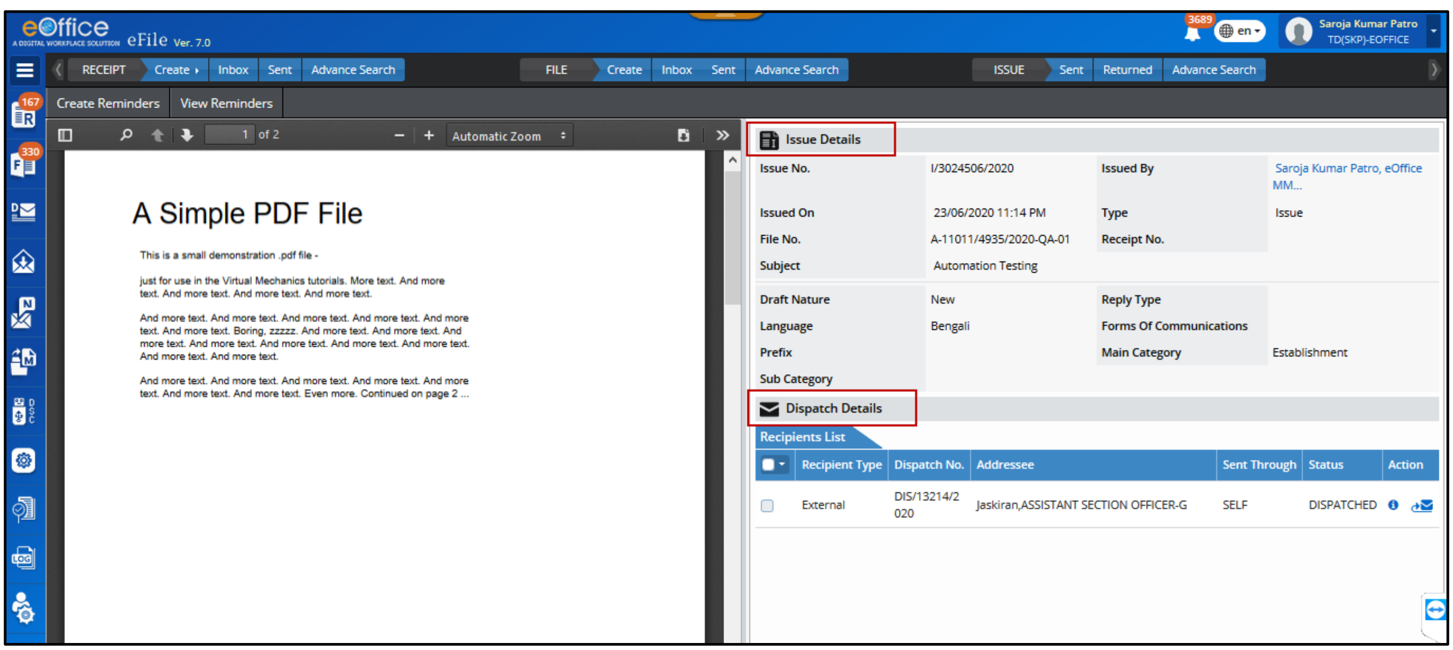


Figure 397

Note:

- The Dispatch number will be unique against every dispatch generated for different recipients of the same Issue letter.
- Each Dispatch will have its own status.
- The Status of the Dispatch will be **Dispatched** in case dispatched via self.
- The Status of the Dispatch will be **Sent** in case it is sent to CRU for dispatch and will turn to **Dispatched** in case the issue has been dispatched by the CRU.

Create Reminders

Creating reminders is to create a 'Draft for Approval' as a reminder against an existing Issue already generated from the system. These reminders are dispatched as Issue letters with their type defined as 'Reminder' instead of 'Issue'.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Sent/Dispatched'.**
3. Select the required **ISSUE No.**
4. Click on **'Create Reminders'.**

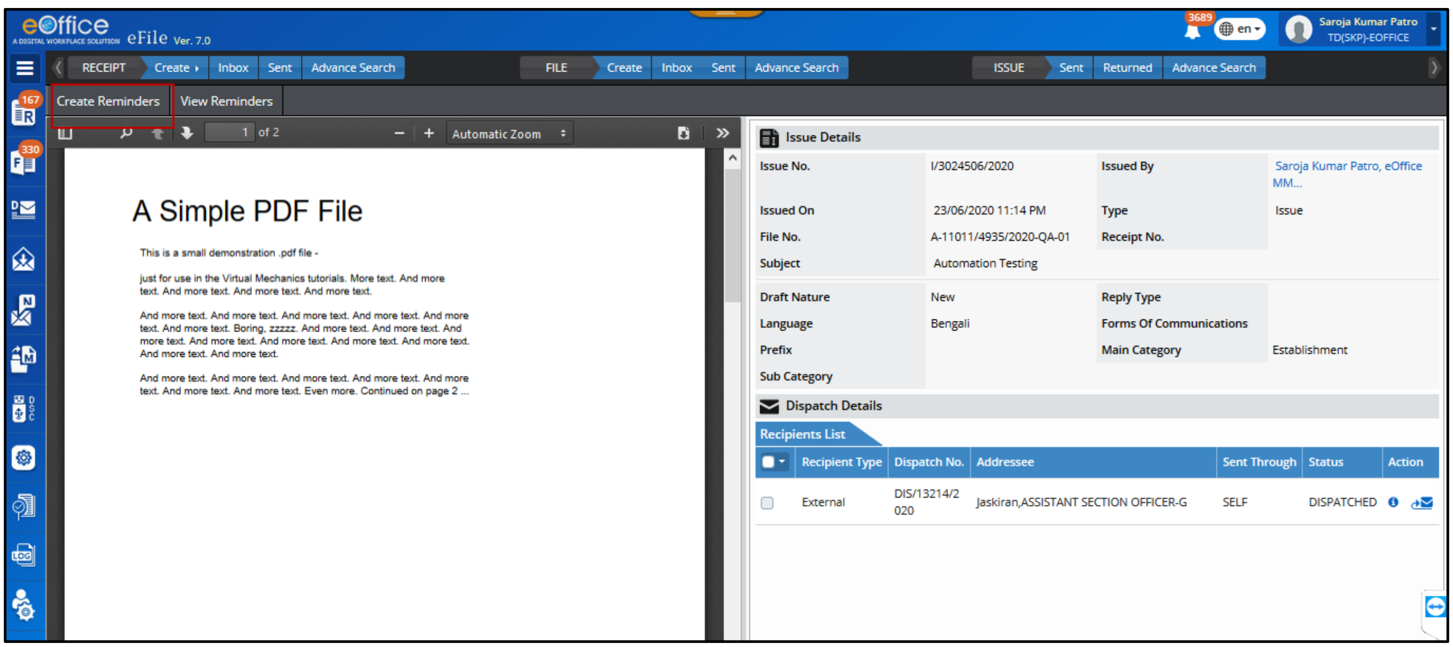


Figure 398

5. Follow steps as mentioned in article to create a reminder. (***Draft Nature, Issue No.*** *and* ***Reply Type*** *will be auto populated and remains locked)*
6. Follow steps to Sign the reminder Created.
7. Follow steps to Dispatch the reminder created.

View Reminders

This displays the number of reminders already sent against an Issue letter.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Sent/Dispatched' or 'Returned'.**

Note:

- Reminders can be checked for both Issues in 'Dispatched' list and 'Returned' from CRU list, if previously created.

3. Select the required '**Issue No.**'.
4. Click on **'View Reminders'.**

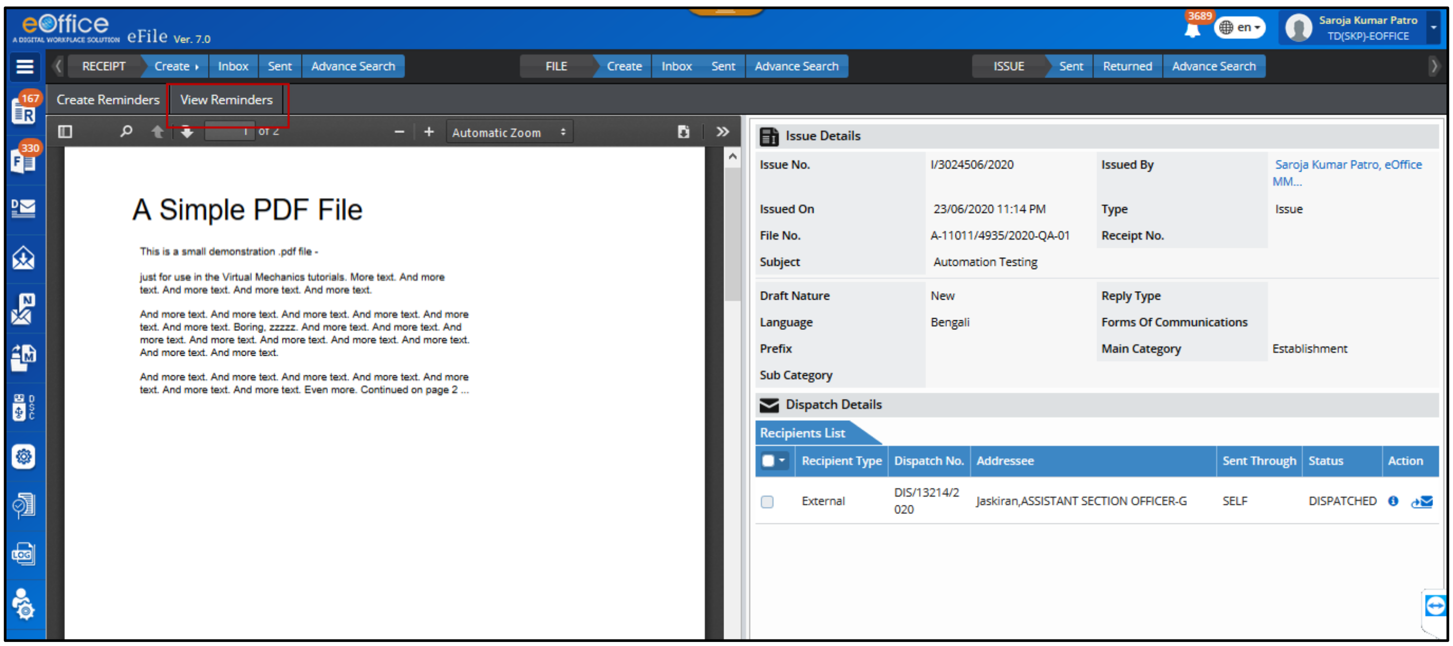


Figure 399

View Dispatch Details

The dispatch details are maintained individually against every dispatch sent against an Issue. Upon clicking Details Icon against a dispatch, the Dispatch detail popupwill open.

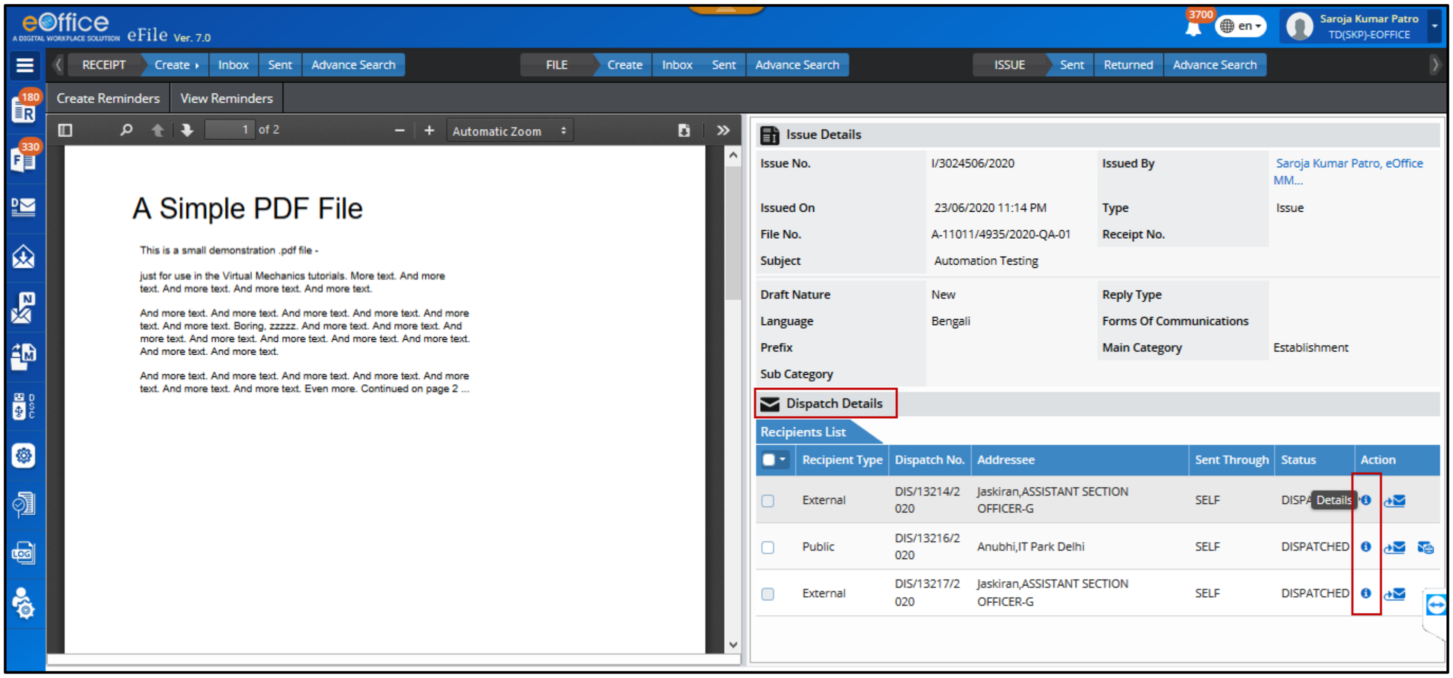


Figure 400

- **Basic Details** – It displays –
  a) **Dispatch details** – Details such as dispatch no., dispatch sent by, date sent on, Dispatch by, Delivery mode, and etc.
  b) **Communication details** – Communication details of the addressee
  c) **Postal Details** – The postal details recorded if sent by post media.

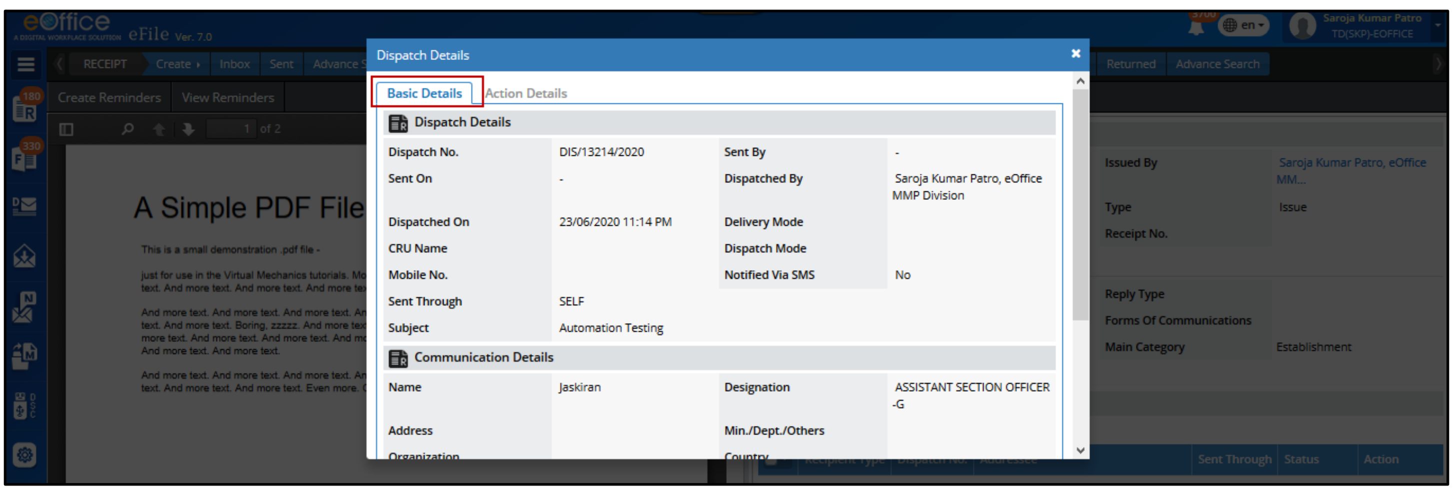


Figure 401

- **Action Details** – These are the details of the actions on the dispatch taken after it is dispatched or sent for dispatch. The Dispatch by Self or CRU details recorded with dispatch date and remarks. In case the dispatch is returned by the CRU for further clarification, the movement of return from CRU and Resend by user with remarks also recorded here.

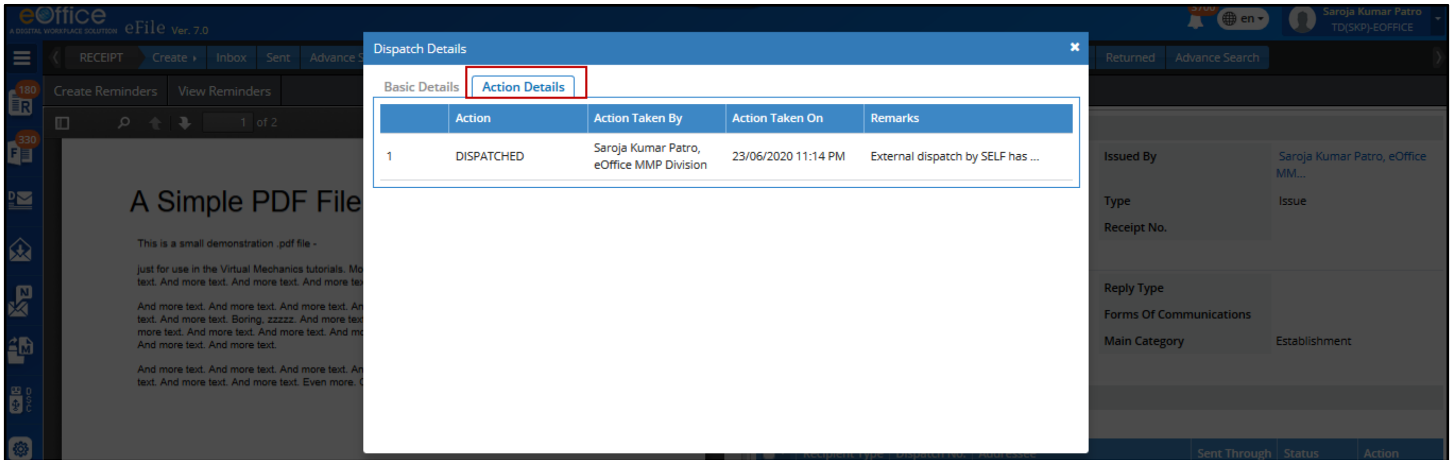


Figure 402

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click **'Sent/Dispatched'.**
3. Click the **'Issue No.'** to open and view the issue details.
4. In the **'Dispatch Details'** (available on the bottom part of the right side of the screen), click on **'Details'** icon against the respective dispatch entry you wish to see details for. (*The dispatch details are available in the pop-up box*.)

Alternatively:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Returned'.**
3. Click on **'Details'** icon against the respective dispatch entry you wish to see details for. (*The dispatch details are available in the pop-up box.)*

Re-Dispatch

This action enables the user to re-dispatch the already approved and signed issue letter.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Sent/Dispatched'.**
3. Click on the **'Issue No.'** to open and view the issue details.
4. In the **'Dispatch Details'** (available on the bottom part of the right side of the screen), click on **'Re-Dispatch'** icon.

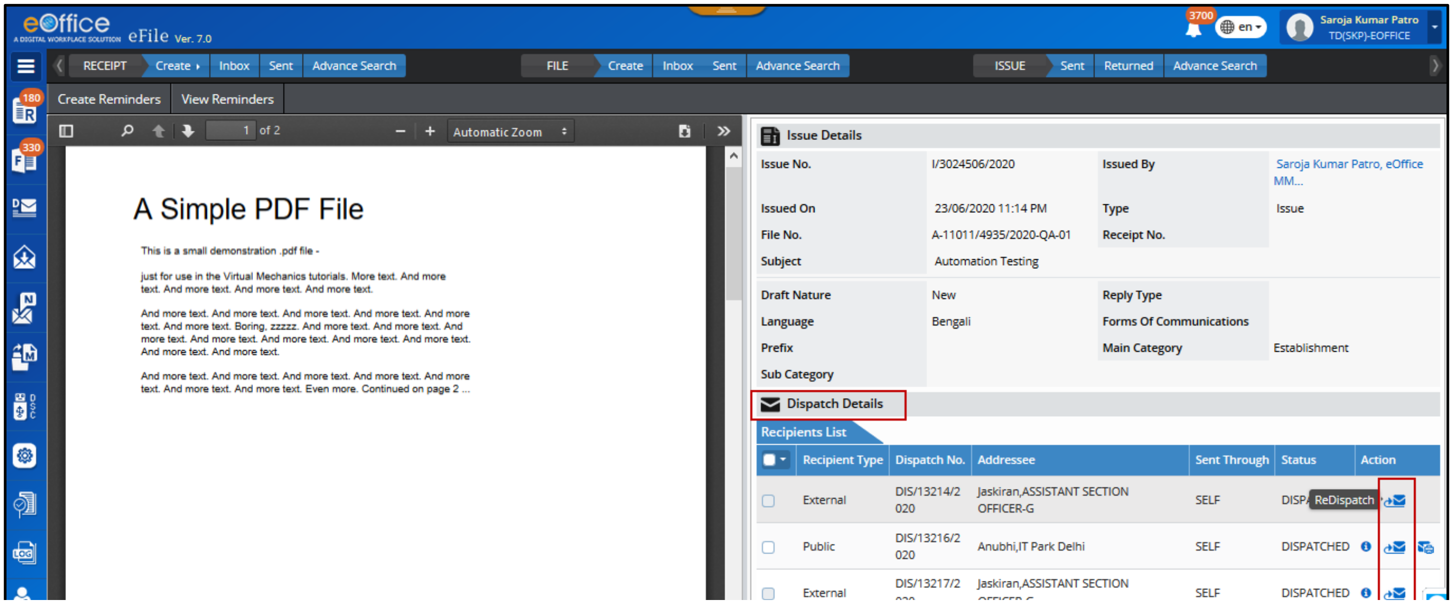


Figure 403

Print Envelope

This action allows the user to print envelope for the letter to be dispatched. Upon clicking, the system will ask user to choose from a pre-defined set of templates which will then be downloaded to user system ready for print-out.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Sent/Dispatched'.**
3. Click on the **'Issue No.'** to open and view the issue details.
4. In the **'Dispatch Details'** (available on the bottom part of the right side of the screen), click on **'Print Envelope'** icon.

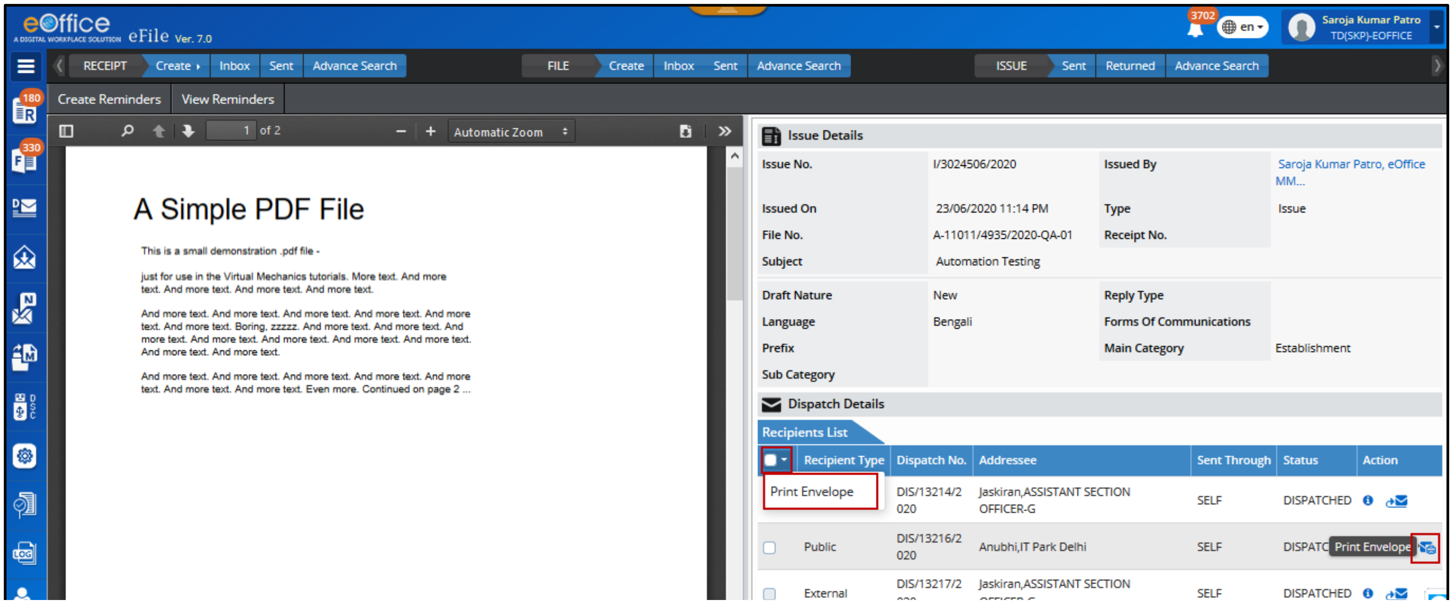


Figure 404

5. In the pop-up box, choose the required template of the envelope and click on **'Download'**.

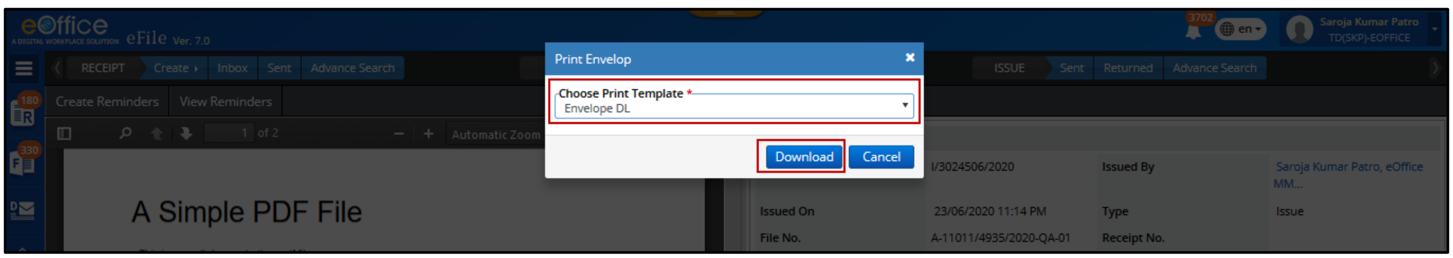


Figure 405

List of Issues Returned by CRU

This list of returned dispatches are those dispatch requests which were sent to CRU and are returned back seeking for further clarification for dispatch process to complete. It is expected that the user may check the remarks submitted by CRU and provide the necessary clarification. This list can be checked by –

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'**.
2. Click on **'Returned'.**

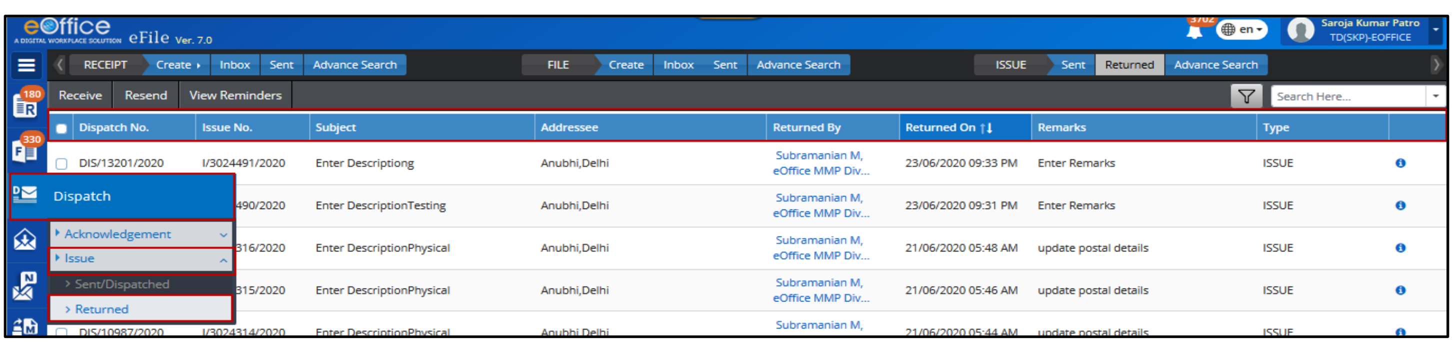


Figure 406

The user can now see the list of dispatches returned by the CRU. The following information is available –

1. **Nature:** The nature of the ISSUE, Physical (P) / Electronic (E).
2. **Dispatch No.:** The unique number generated for different dispatches against the Issue letter.
3. **Issue number:** The unique number of the ISSUE sent for dispatch.
4. **Subject:** The subject of the ISSUE recorded while creating it in Draft for Approval Stage.
5. **Addressee:** The recipient details of the dispatch generated against an Issue.
6. **Returned By:** The name of the CRU who has returned the Issue against a specific dispatch.
7. **Returned On:** The date and time on which the Issue against a specific dispatch is returned.
8. **Remarks:** The remarks submitted by CRU seeking some clarification on the dispatch against the issue returned.
9. **Type:** The type of the issue whether it is an ISSUE or REMINDER to an ISSUE.

Resend the Returned Issue for Dispatch by CRU

After checking the necessary remarks against the dispatch returned by CRU, the user may resend it back for dispatch by adding/editing some communication details of the intended recipient, for example, if the pin code was found to be incorrect hence unable to make postal dispatch. Or CRU may simply ask for some clarification which can be submitted as remarks.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Issue'** and then click on **'Returned'.**
2. Select the required **'Dispatch'**.
3. Click on **'Receive'**. (*In case, it is in an unreceived state*)

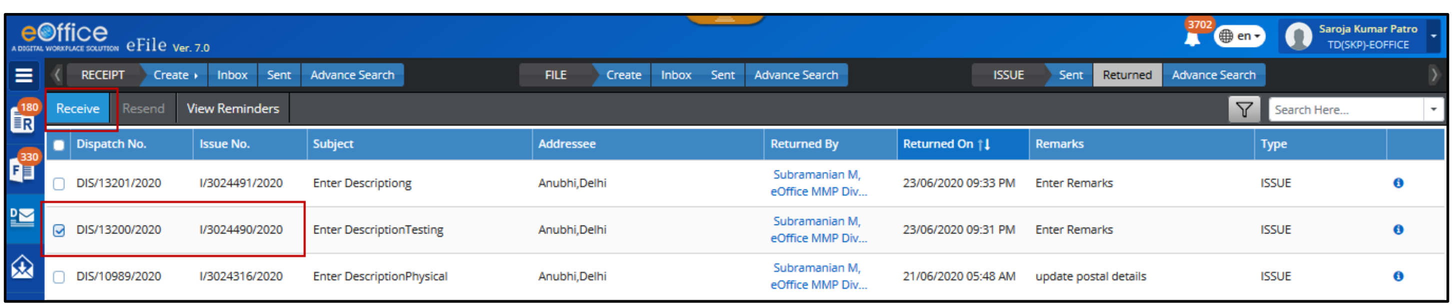


Figure 407

4. Click on **'Dispatch No.'** to edit the recipient details (if required).
5. Click on **'Save'**.(*Click* ***Save and Send*** *to directly resend dispatch from edit page*)

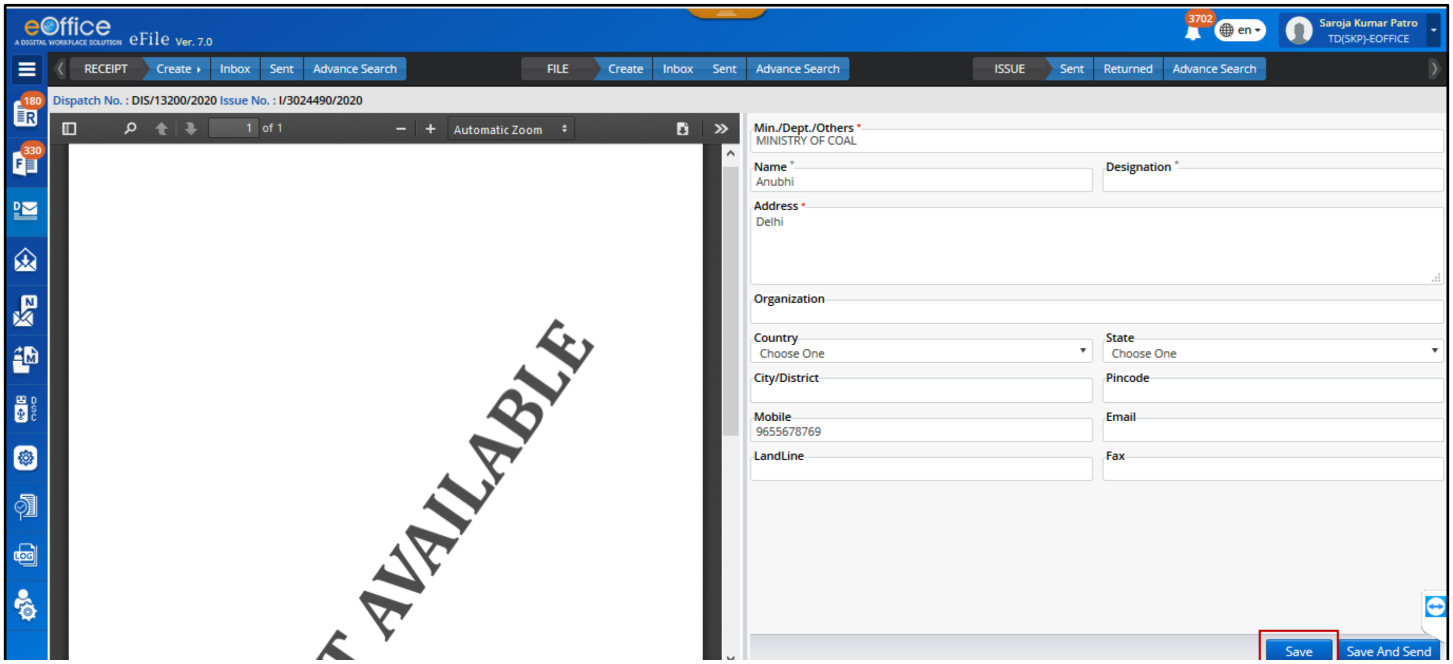


Figure 408

6. From the returned list, select the **'Dispatch'** and click on **'Resend'**.

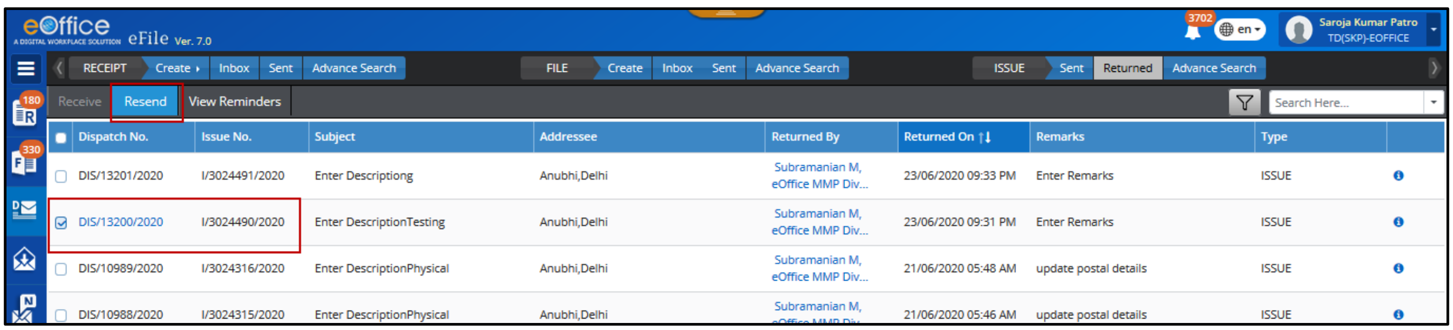


Figure 409

7. Enter the mandatory Remarks in the pop-up box and click on **'OK'** to 'resend.

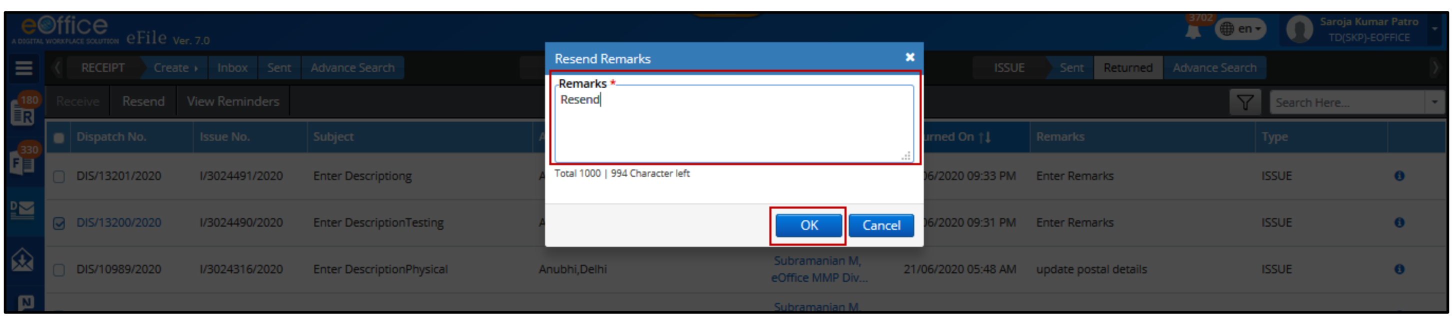


Figure 410

Advance Search for Issue

This Feature allows User to users to Search and Retrieve Issue (According to the assigned Search Scope) and take actions on searched records (According to assigned Action Scope).

Important Points:

- ✓ Search Privileges must have been set for instance level by administrator. (Refer search privilege for whole instance).
- ✓ Search privilege if set for user must restrict or allow the user to search and take action beyond the scope set for whole instance (Refer search privilege for individual user).
- ✓ Advance Search for Issue is available to Officers and Dealing hands only.

STEPS TO FOLLOW:

1. Click **Advanced Search** link in **Issue Quick Access** Menu. (*System redirects to the 'Advanced Search' screen with 'Issue' tab activated by default.*)

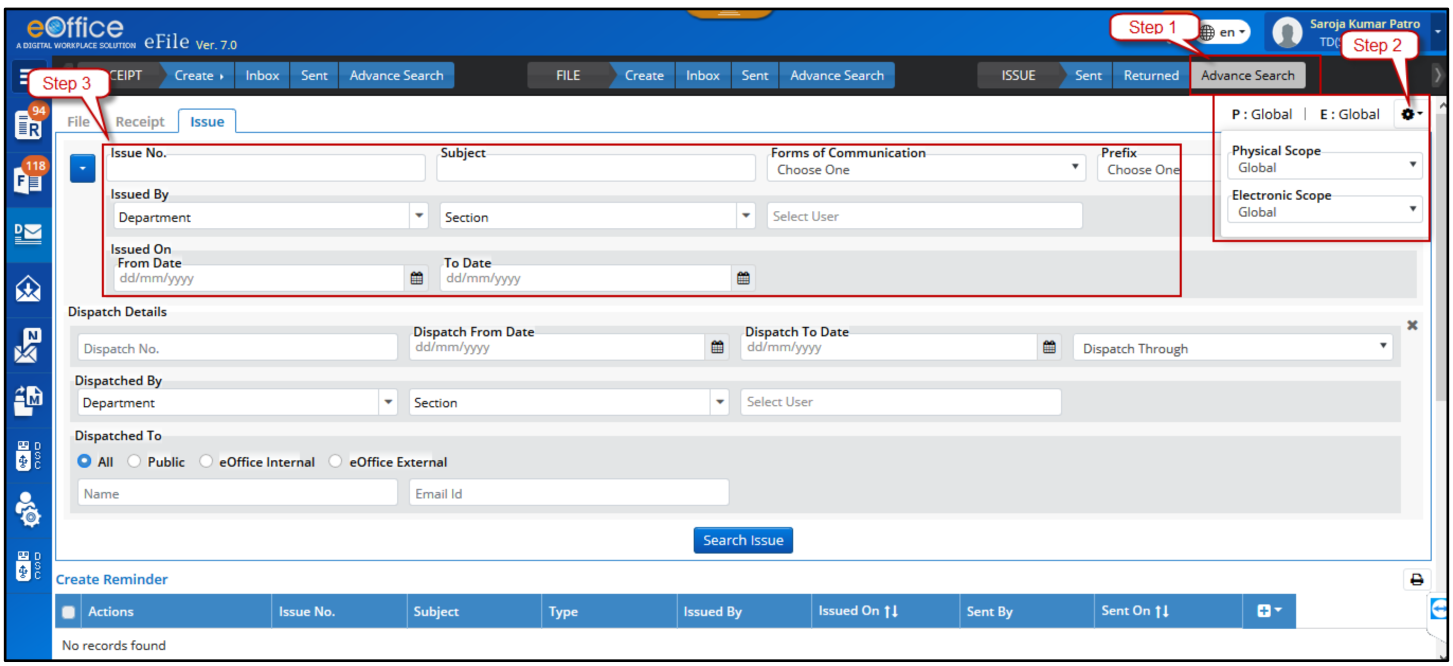


Figure 411

2. Select **Physical Scope** and **Electronic Scope** (*By Default Value is Global or as per assigned Search Scope*).

3. Search from main **Basic parameters** (*Issue No., Subject, Form of Communication, Prefix, Issued By and Issued On*).

4. Select **Additional parameters** from dropdown list icon to search with additional inputs. (*Issue Details and Dispatch Details*).

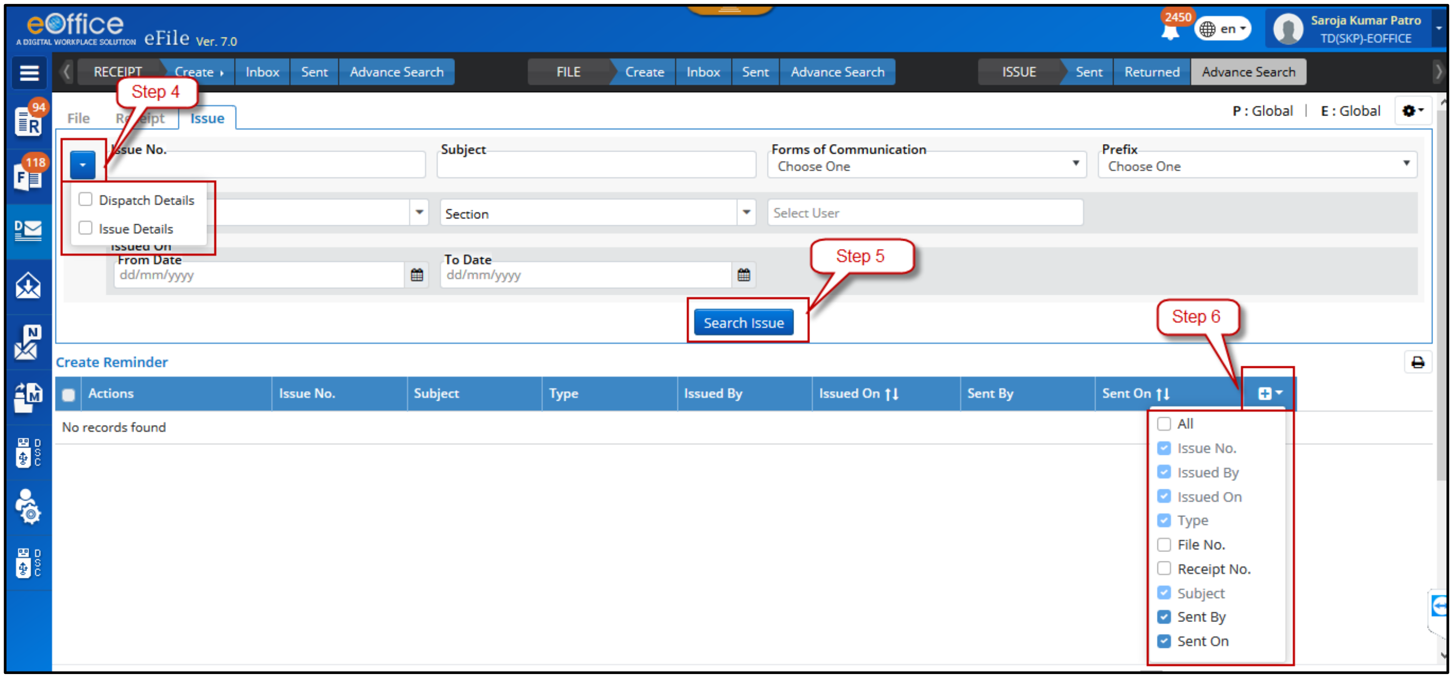


Figure 412

Note:

- Additional Parameters will not be available if Origin of File is selected External.

5. Click **Search** File button to search the file records.
6. Opt for default output fields or Select/Remove output fields. (*Issue No., Issued By, Issued On, Type and Subject cannot be removed*)

Note:

- List of Issues will be displayed based on selected input search parameters values.

Actions Allowed on Searched Receipt

- **Create Remainder:** Clicking on **Create Remainder** action link/menu should open **Remainder draft creation** page in case of **Electronic File/Receipt** and **Remainder Dispatch** page in case of **Physical File/Receipt.**

  Note:

  - This action should be displayed depending upon action scope set for whole eOffice Instance.
  - Action scope for individual should superimpose scope set for whole instance.

- **Details:** Clicking on details action link should display Issue detail Popup.

Dispatch (CRU)

This module is available to only the users who are working in Central Registry Unit and dealing with dispatch associated work for the Ministry/Organization/Department. This module keeps the record of the Issues and acknowledgements dispatched or pending for dispatch.

Inbox

This **Inbox** of **Dispatch** consists of dispatch requests received by the CRU from any of the other user in the department. The CRU then checks the received dispatch request and then dispatched it via requested delivery mode.

In case, some clarification is to be sought from the user who has sent the request for dispatch, then the CRU may return it back with the appropriate remarks.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click **'Inbox'**.

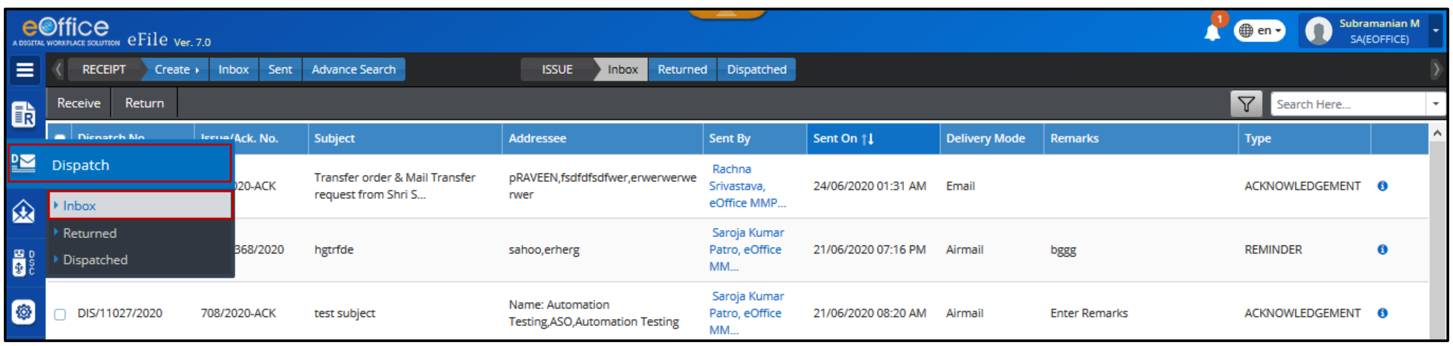


Figure 413

The user can now see the list of dispatch request. The following information is available –

1. **Dispatch Number:** The unique dispatch number generated against the Issue number.
2. **Issue number/ACK No.:** The Issue/Acknowledgement number against which dispatch is to be sent.
3. **Subject:** The subject of the Issue/Acknowledgement sent for dispatch.
4. **Addressee:** The recipient details to whom dispatch is to be made.
5. **Sent By:** The user details who has requested for dispatch to CRU. (click on user name for more details)
6. **Sent On:** The date on which the dispatch request is made to the CRU.
7. **Delivery Mode:** The requested mode for delivery.
8. **Remarks:** The remarks with which the user requested for dispatch. This may contain necessary message for the CRU.
9. **Type:** The type of the dispatch whether it is against an Issue or an Acknowledgement.

Dispatch the Issue letter

This section describes the steps to dispatch the Issue letters received in Inbox for dispatch by CRU.

STEPS TO FOLLOW:

1. Under **Dispatch** module, click on **Inbox**.
2. Select the required dispatch and click **Receive**.

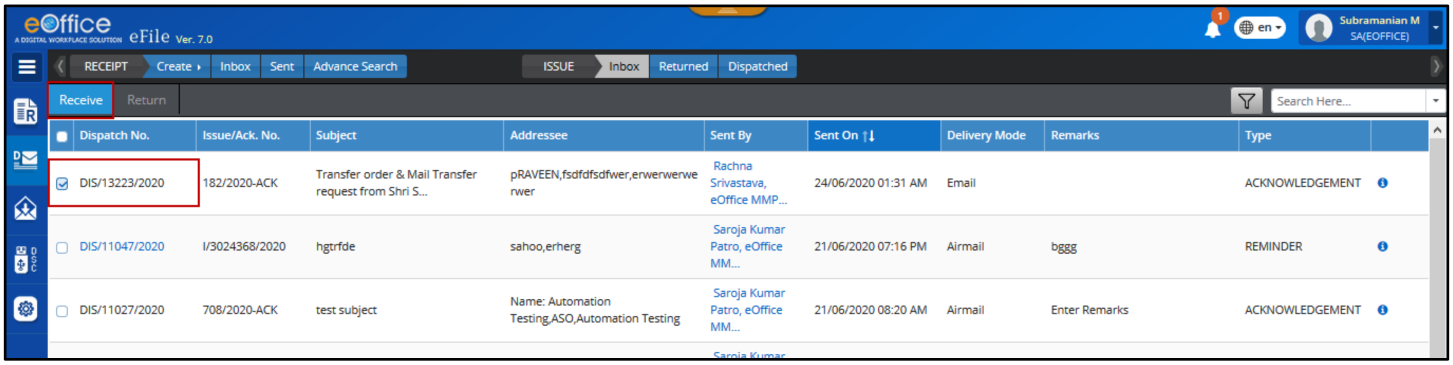


Figure 414

3. Click on the **Dispatch No**. to open.
4. Enter the **Postal out and Register details**.

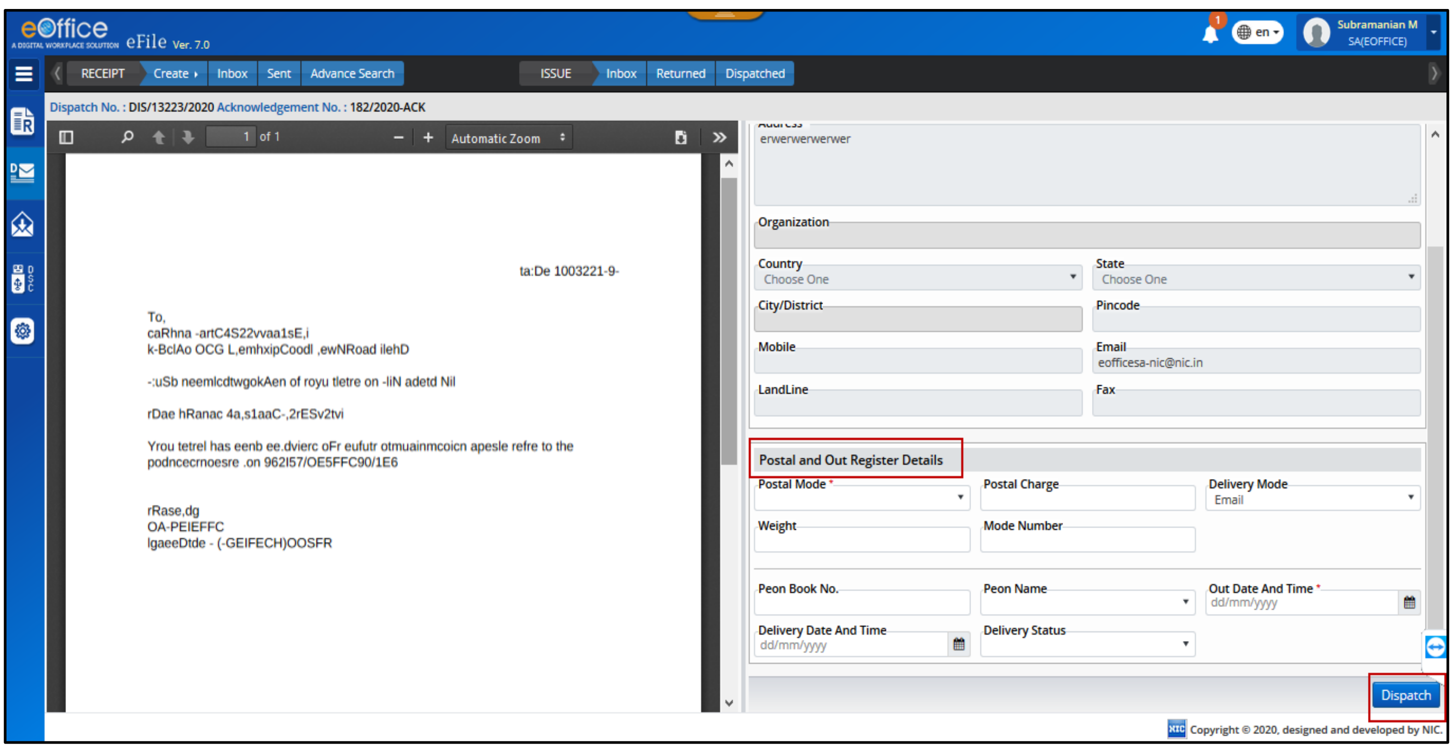


Figure 415

5. Click **Dispatch**.

The dispatched 'Issues/Acknowledgements' can be viewed under Dispatched section.

Note:

- After the Issue/Acknowledgement is dispatched by the CRU to the concerned recipient, the dispatch action by CRU with timestamp and remarks is recorded in the Action details under dispatch details against the respective dispatch entry.
- Once the letter is dispatched by the **CRU** the status of the dispatch against respective issue in **User'sDispatch->Issue->Sent** (who has sent 'Dispatch by CRU' request) will change to **Dispatched**.

Return the Dispatch

This section describes the steps to return the dispatch to the user from whom the dispatch request is received. This is required in case scenarios where CRU wants to seek more information on the dispatch, for example, if the pin code was found to be incorrect hence unable to make postal dispatch.

STEPS TO FOLLOW:

1. Under **Dispatch** module, click on **Inbox**.
2. Select the dispatch and click **Receive**. (*In case, it is not in received state i.e. the dispatch number link is not active to be clicked on*)
3. Select Dispatch using checkbox and click return menu.

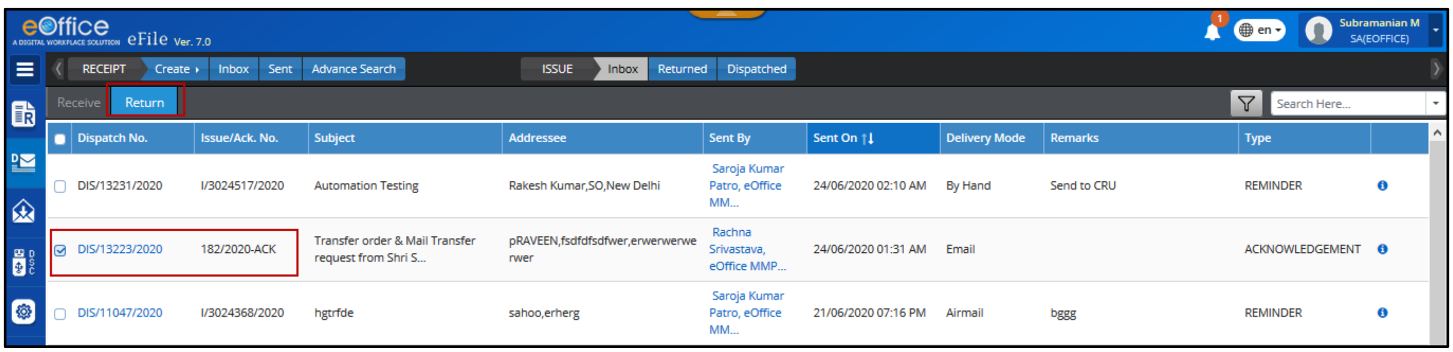


Figure 416

4. Enter the mandatory **Remarks** (the clarification required) in the pop-up box and click **OK.**

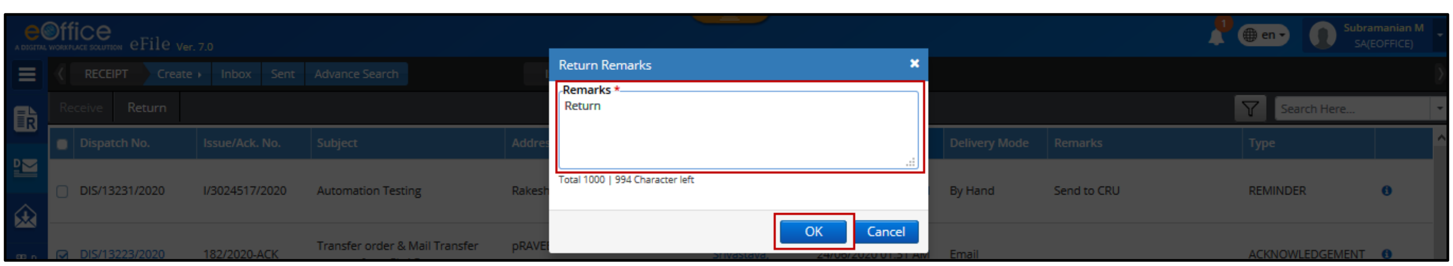


Figure 417

Note:

- The list of returned dispatched can be seen on Returned Section.
- Once the user provides the necessary details, it will return back in Dispatch 'Inbox' of the CRU.
- This movement of return and resend between CRU and the user (officer/dealing hand) is recorded in Action Details tab of the Dispatch Details.

View Dispatch Details

The dispatch details are maintained individually against every dispatch sent against an Issue/Acknowledgement. Upon clicking Details Icon, Dispatch detail popup will open displaying various details.

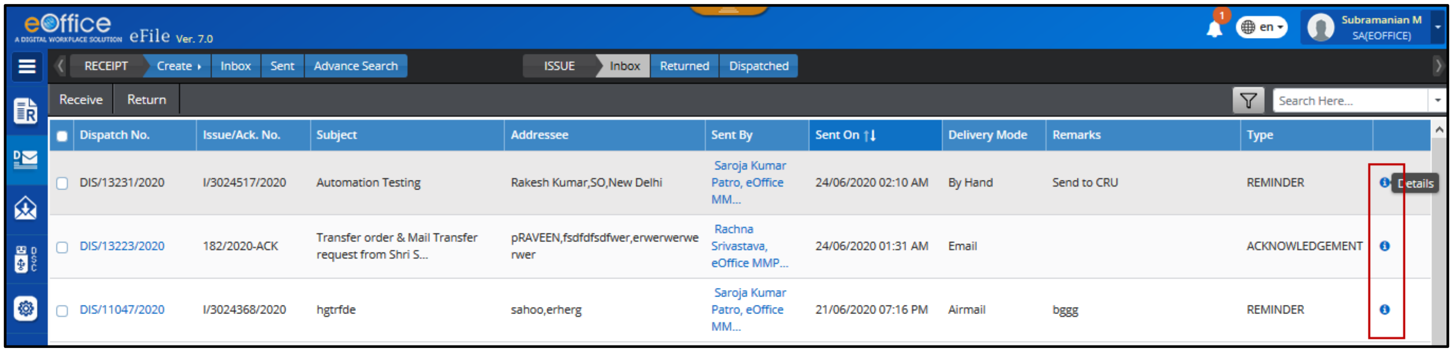


Figure 418

- **Basic Details** – It displays –

  a) **Dispatch details** – Details such as dispatch no., dispatch sent by, date sent on, Dispatch by, Delivery mode, and etc.

  b) **Communication details** – Communication details of the addressee

  c) **Postal Details** – The postal details recorded if sent by post media.

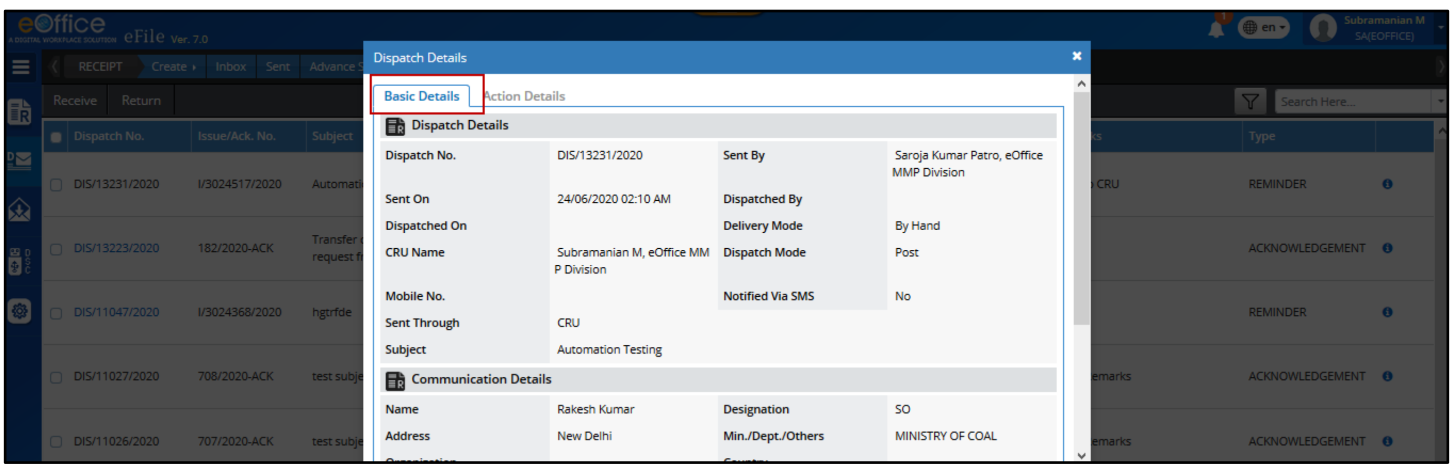


Figure 419

- **Action Details** – These are the details of the actions on the dispatch taken after it is dispatched or sent for dispatch. The Dispatch by Self or CRU details recorded with dispatch date and remarks. In case the dispatch is returned by the CRU for further clarification, the movement of return from CRU and Resend by user with remarks also recorded here.

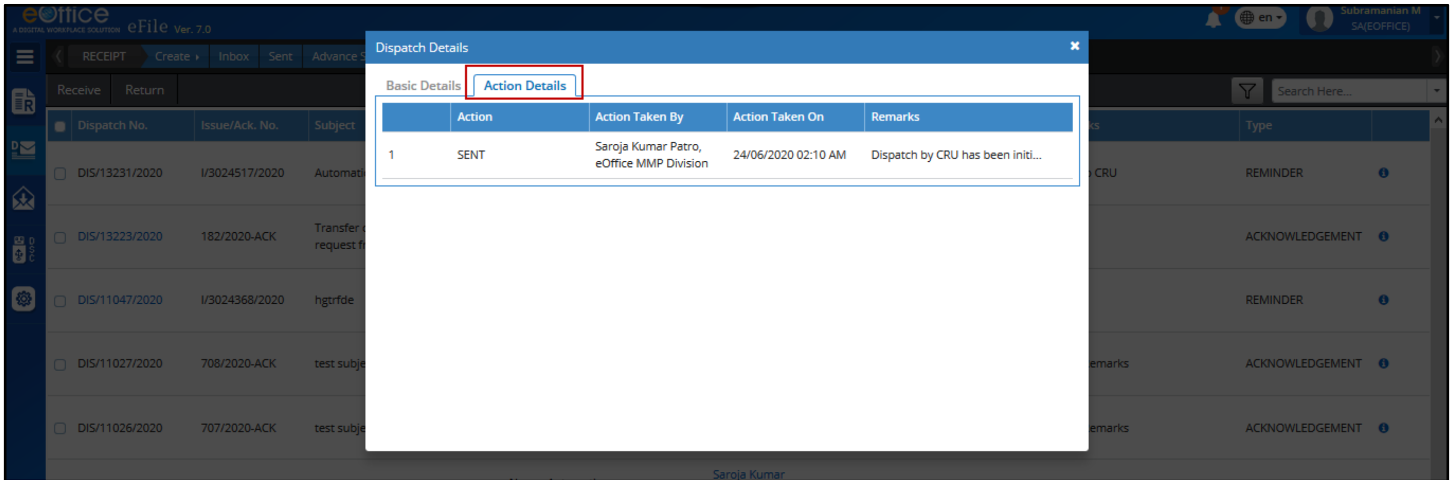


Figure 420

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Inbox'**.
2. In the **'Dispatch Details'** (available on the bottom part of the right side of the screen), click on **'Details'** icon against the respective dispatch entry you wish to see details for. (*The dispatch details are available in the pop-up box*.)

Returned

This is the list of dispatches returned by the CRU to the user (who has requested for 'Dispatch by CRU') seeking for some clarification against the dispatch.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Returned'**.

Figure 421

The user can now see the list of dispatch returned. The following information is available –

1. **Dispatch Number:** The unique dispatch number generated against the Issue number.
2. **Issue number/ACK No.:** The Issue/Acknowledgement number against which dispatch is to be sent.
3. **Subject:** The subject of the Issue/Acknowledgement sent for dispatch.
4. **Addressee:** The recipient details to whom dispatch is to be made.
5. **Returned By:** The CRU details who has returned the dispatch to the user. (Click on user name for more details)
6. **Returned To:** The user details to whom the dispatch has been returned. (Click on user name for more details)
7. **Returned On:** The date on which the dispatch is returned.
8. **Delivery Mode:** The requested mode for delivery.
9. **Remarks:** The remarks with which the CRU returned the dispatch.
10. **Type:** The type of the dispatch whether it is against an Issue or an Acknowledgement.

Pull – Back the Returned Dispatch

The returned dispatch can be pulled back by the CRU in case the scenarios where –

- A wrong dispatch has been returned.
- The clarification requested in not required any more.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Returned'**.
2. Against the required dispatched, click on **'Pull Back'**.

Figure 422

3. In the pop-up box, enter the mandatory **Remarks** and click on **'OK'**.

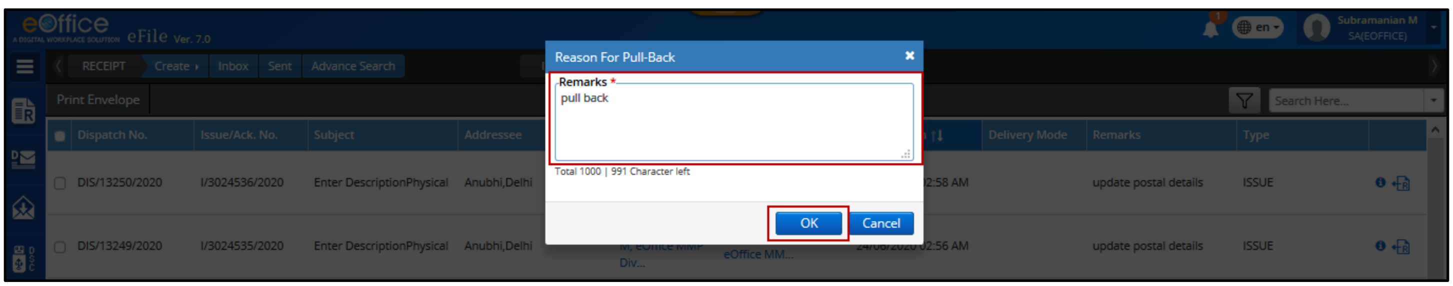


Figure 423

Note:

- The pulled back dispatch will be available in CRU's **Dispatch→Inbox'**

View Dispatch Details

The dispatch details are maintained individually against every dispatch sent against an Issue/Acknowledgement. Upon clicking Details Icon, Dispatch detail popup will open displaying various details. Refer View Details of inbox dispatches.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Returned'**.
2. In the **'Dispatch Details'** (available on the bottom part of the right side of the screen), click on **'Details'** icon against the respective dispatch entry you wish to see details for. (*The dispatch details are available in the pop-up box.*)

Print Envelope

This action allows the user to print envelope for the letter to be dispatched. Upon clicking, the system will ask user to choose from a pre-defined set of templates which will then be downloaded to user system ready for print-out.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Returned'**.
2. Select the respective dispatch against which the envelope is to be generated.
3. Click on **'Print Envelope'.**

Figure 424

4. In the pop-up box, choose the required template of the envelope and click on **'Download'**.

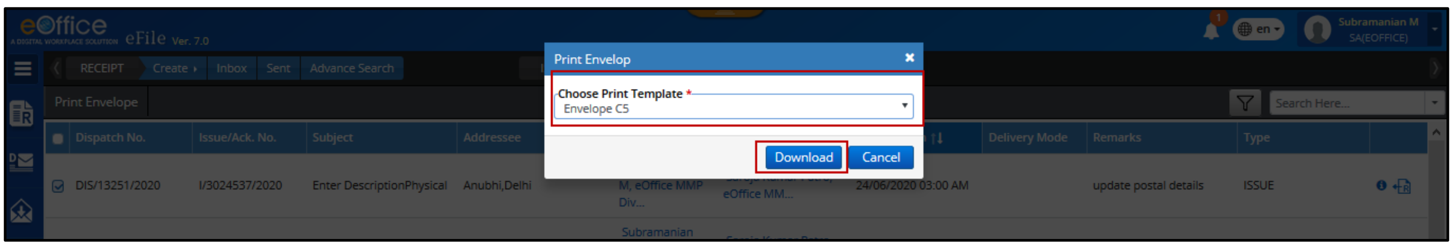


Figure 425

Dispatched

The **'Dispatched'** is the list of Dispatched made by the CRU against their respective Issues.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Dispatched'**.

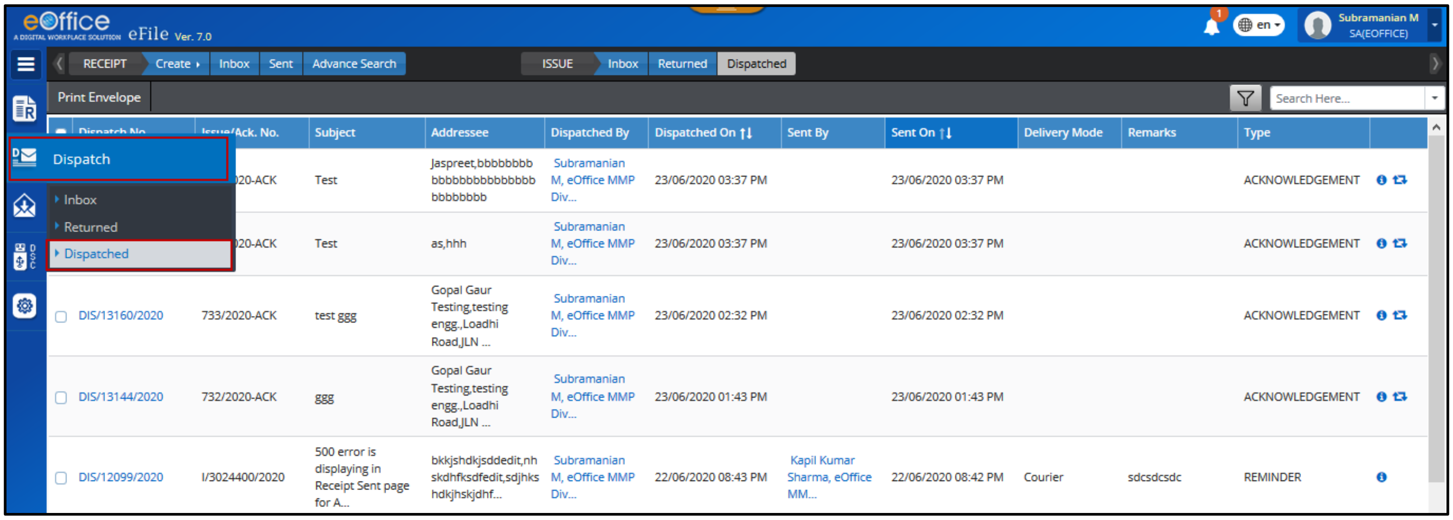


Figure 426

The user can now see the list of dispatch returned. The following information is available

1. **Dispatch Number:** The unique dispatch number generated against the Issue number.
2. **Issue number/ACK no.:** The Issue/Acknowledgement number against which dispatch is sent.
3. **Subject:** The subject of the Issue/Acknowledgement sent for dispatch.
4. **Addressee:** The recipient details to whom dispatch is to be made.
5. **Dispatched By:** The CRU details who has dispatched the Issue/Acknowledgement. (Click on user name for more details)
6. **Dispatched On:** The date on which the dispatch is made.
7. **Sent By:** The user details who had originally requested for dispatch. (Click on user name for more details)
8. **Sent On:** The date on which the request to CRU for dispatch was made.
9. **Delivery Mode:** The requested mode for delivery.
10. **Remarks:** The remarks with which the user requested CRU for dispatch.
11. **Type:** The type of the dispatch whether it is dispatched against an Issue or an Acknowledgement.

View Dispatch Details

The dispatch details are maintained individually against every dispatch sent against an Issue/Acknowledgement. Upon clicking Details Icon, Dispatch detail popup will open displaying various details. Refer View Details of inbox dispatches.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Dispatched'**.
2. In the **'Dispatch Details'** (available on the bottom part of the right side of the screen), click on **'Details'** icon against the respective dispatch entry you wish to see details for. (*The dispatch details are available in the pop-up box.*)

Print Envelope

This action allows the user to print envelope for the letter to be dispatched. Upon clicking, the system will ask user to choose from a pre-defined set of templates which will then be downloaded to user system ready for print-out.

STEPS TO FOLLOW:

1. Under **'Dispatch'** module, click on **'Dispatched'**.
2. Select the respective dispatch against which the envelope is to be generated.
3. Click on **'Print Envelope'.**

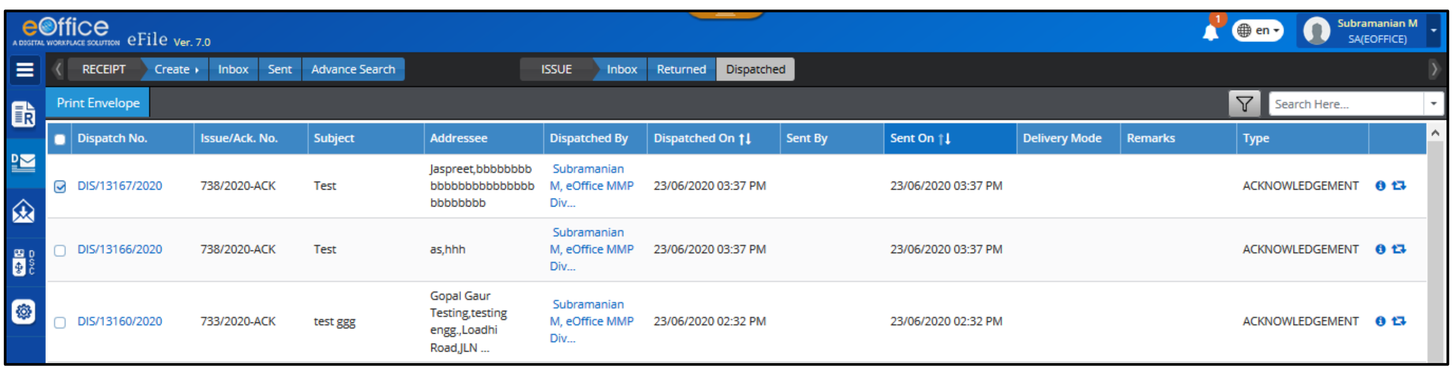


Figure 427

4. In the pop-up box, choose the required template of the envelope and click on **'Download'**.

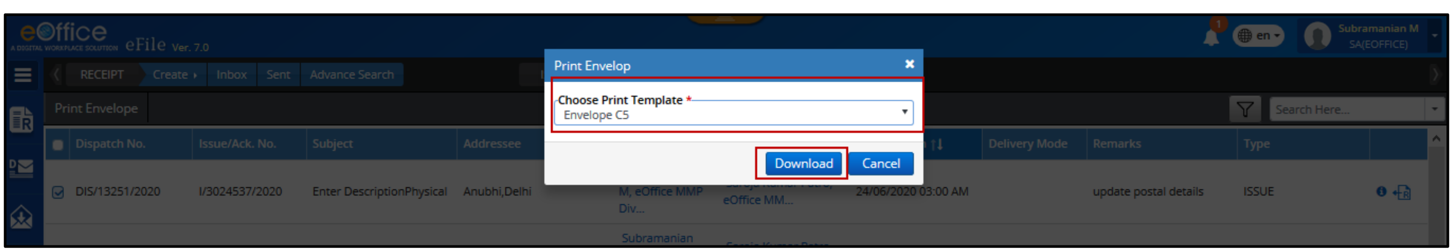


Figure 428

Regenerate Acknowledgement

Regenerating an acknowledgement is the re-issuance of the acknowledgement with some modification in the content and/or the recipient details required in case scenarios when,

- The acknowledgement has to be sent again in case the intended recipient informs of not receiving the acknowledgement (Incorrect communication details could be a reason)
- The acknowledgement is to be sent to some more recipients.

Regenerate acknowledgement for CRU will be available only when acknowledgement was created and dispatched by CRU itself.

STEPS TO FOLLOW:

1. Click **Dispatch→Dispatched**.
2. Click on **Regenerate** icon against an dispatched acknowledgement.

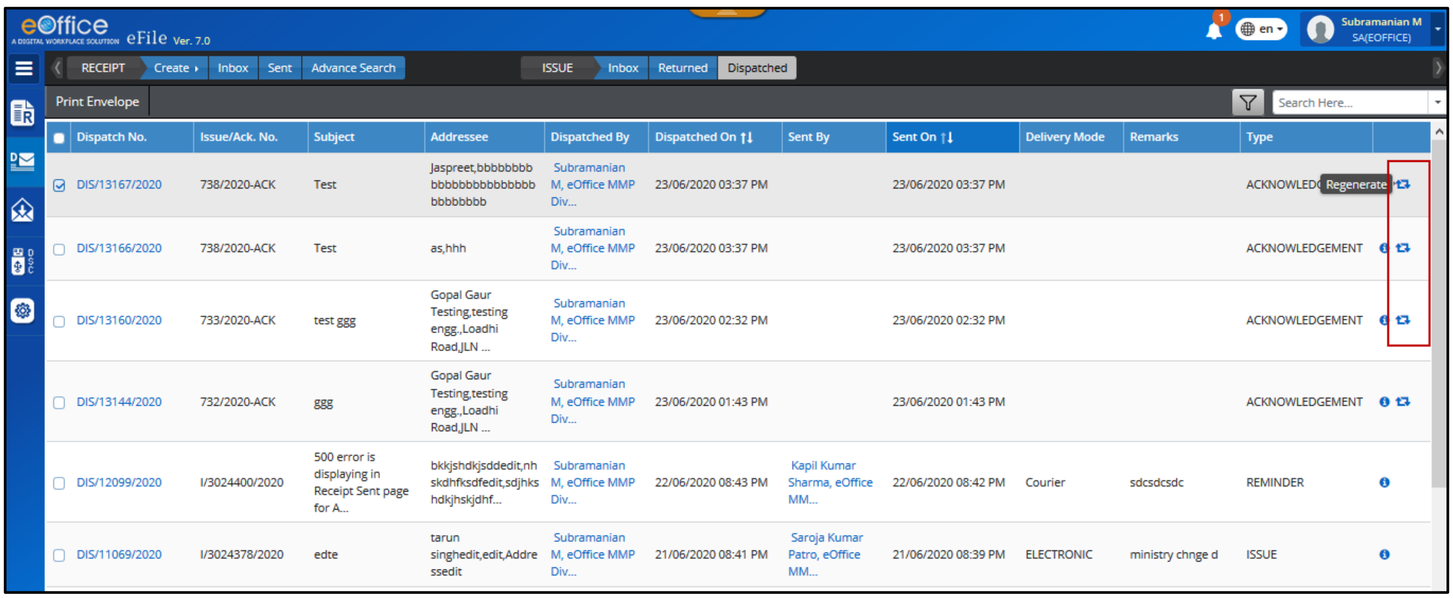


Figure 429

3. Edit the content of the acknowledgement (if required).
4. Click on **Continue**.

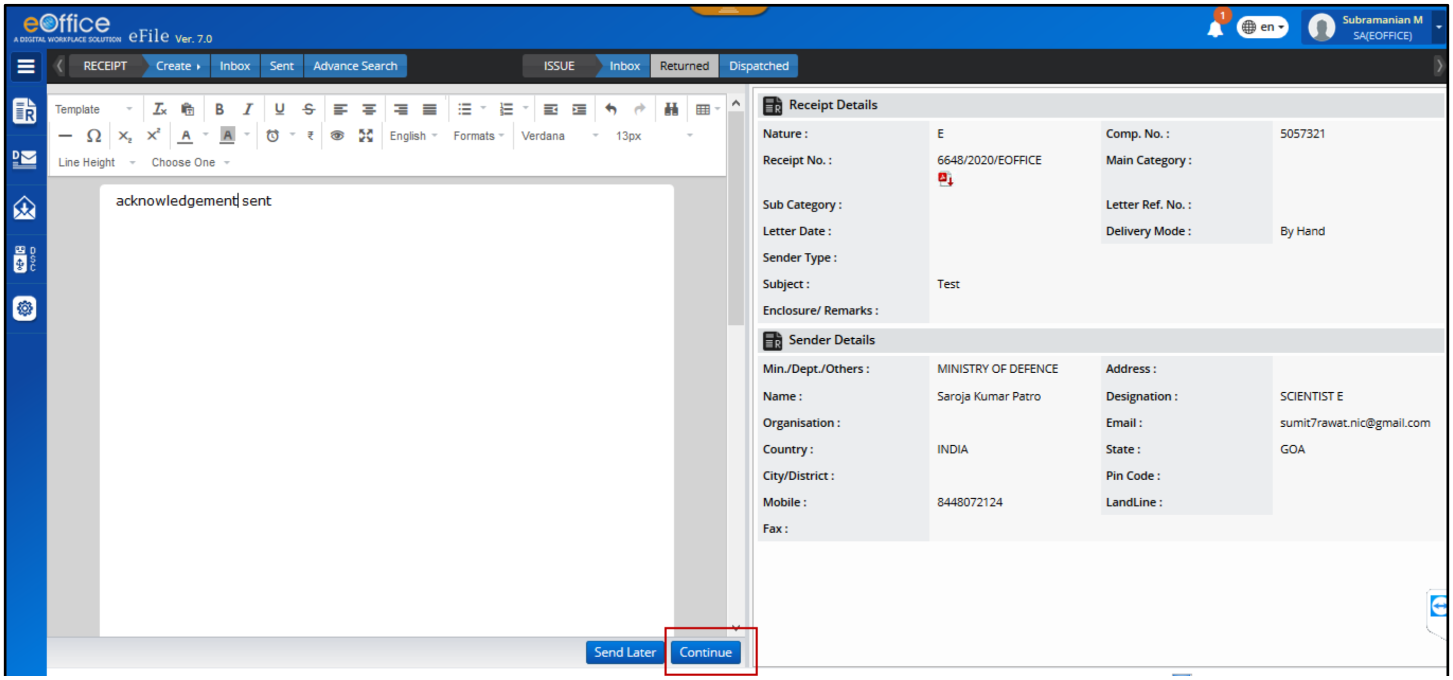


Figure 430

Note:

- Refer article for 'Steps to Sign an acknowledgement.
- Refer article for Steps to Dispatch an acknowledgement.

This section describes the steps to view the list of follow-ups created previously against the dispatches and further to check their details and close if necessary.

Dispatch Follow-ups

View details of Dispatch Follow-up

STEPS TO FOLLOW:

1. Click on **Dispatch Followups** link under Notification module.

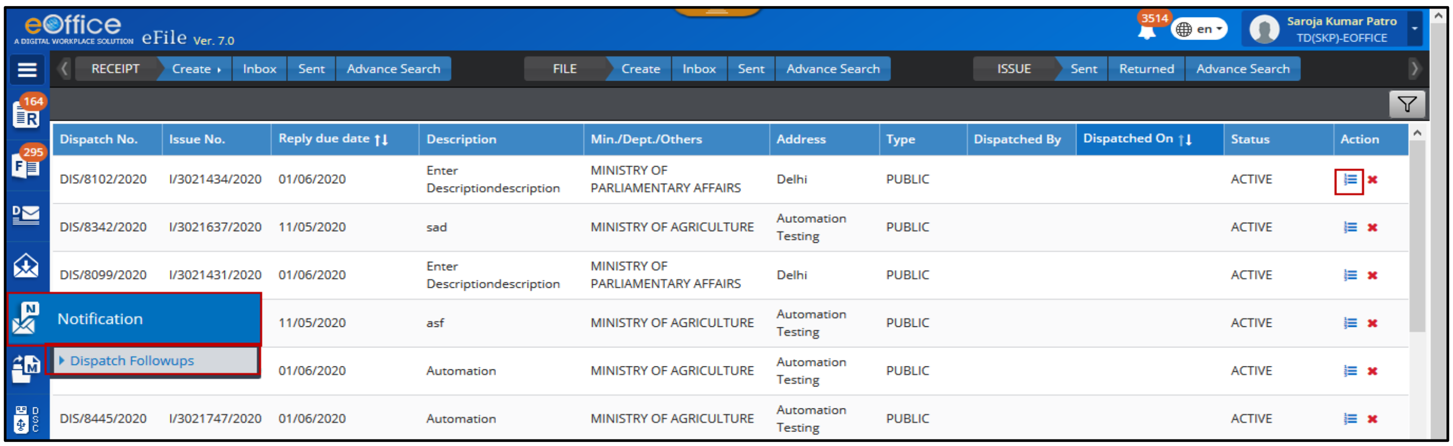


Figure 431

2. By Default, list of **Dispatch Followups** is displayed which have **reply due as on date**. (i.e. Reply due date already elapsed and due on current date).

Note:

- If required, select set necessary filters in 'Filter view' for optimized results

3. Click **Details** icon to view the Followup details of the corresponding dispatch followup. In the pop-up box the dispatch followup details will be displayed.

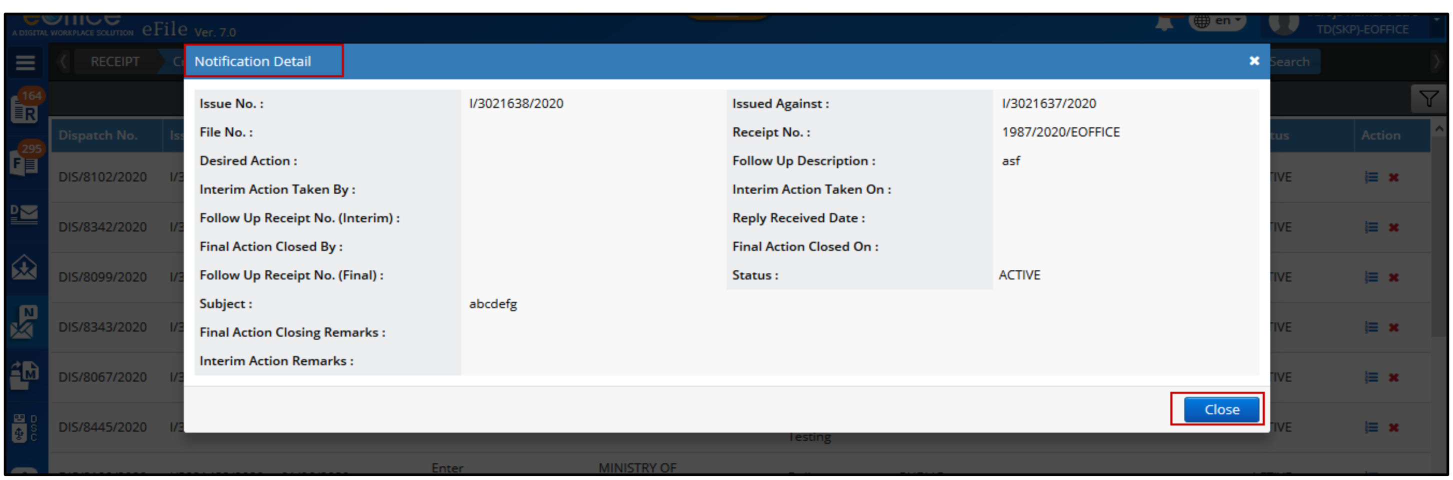


Figure 432

Close Dispatch Follow-up

Important Points:

✓ Actions like interim closing and final closing can be taken only on followups with active status.

STEPS TO FOLLOW:

1. Click on **'Dispatch Followups'** link under Notification module (**Figure 431**).
2. By Default, list of dispatch followups is displayed which have **reply due as on date**. (i.e. Reply due date already elapsed and due on current date).

   Note:
   - If required, select set necessary filters in 'Filter view' for optimized results
3. Click **Close** icon.

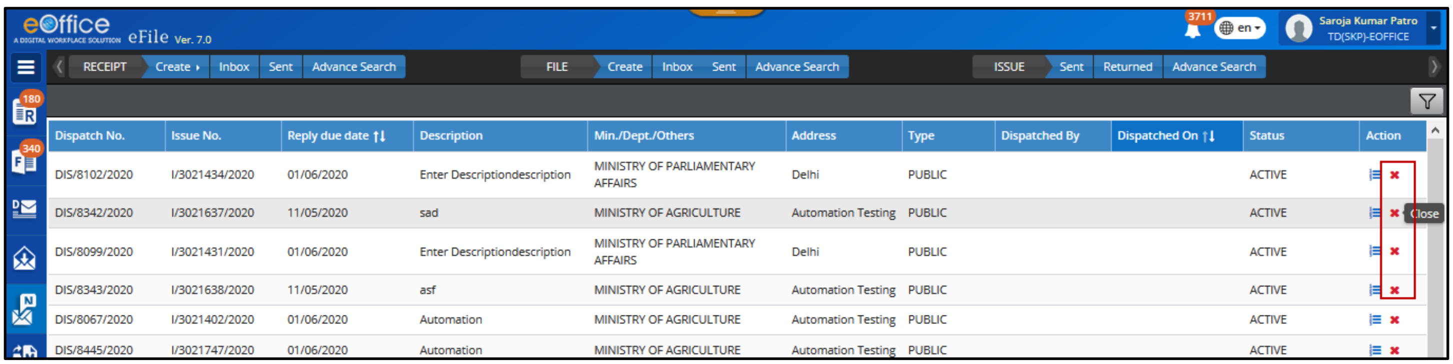


Figure 433

4. Choose close type as **'Interim'** if the reply received in an interim reply or **'Final'** if the reply received against dispatch is final in popup.

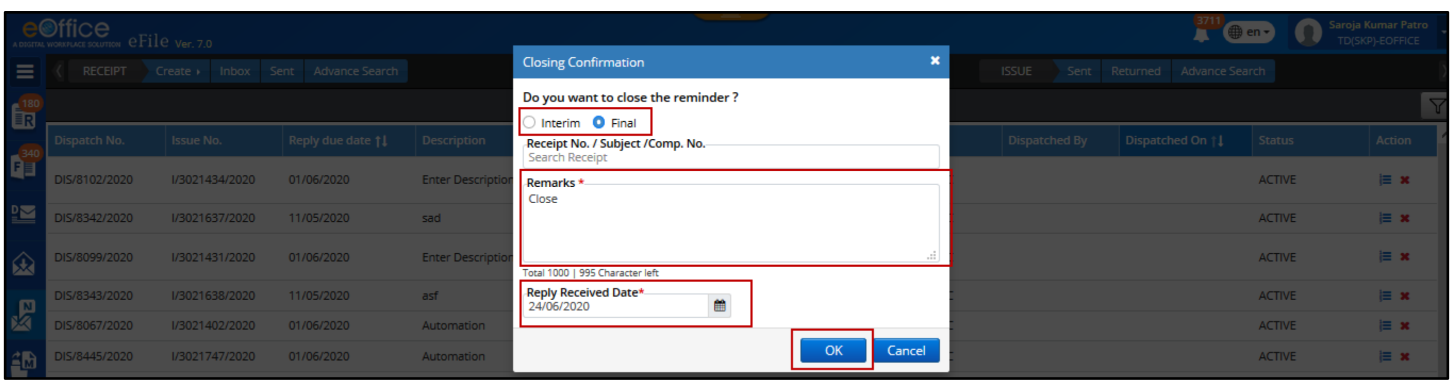


Figure 434

5. Enter Receipt No. /Subject/Comp. No. of the receipt received in reply to the dispatch.
6. Enter mandatory **Remarks**.
7. Enter Received Reply Date. (*The date on which the reply is received against the dispatch*)
8. Click **OK**.

DSC Registration

This Feature allows user to Register and Activate/Deactivate registered **DSC (Digital Signing Certificate)** in eFile Application.

Register DSC

Important Points:

- ✓ Compatible DSC installer must be present in User's Computer.
- ✓ DSC dongle must be plugged into the client machine.
- ✓ User must have valid DSC certificates installed in the client machine.
- ✓ Certificate with which user is going to register must not used by another user for registration.

STEPS TO FOLLOW:

1. Click on '**Registration'** link under **DSC** Module to open Certificate Information Page.

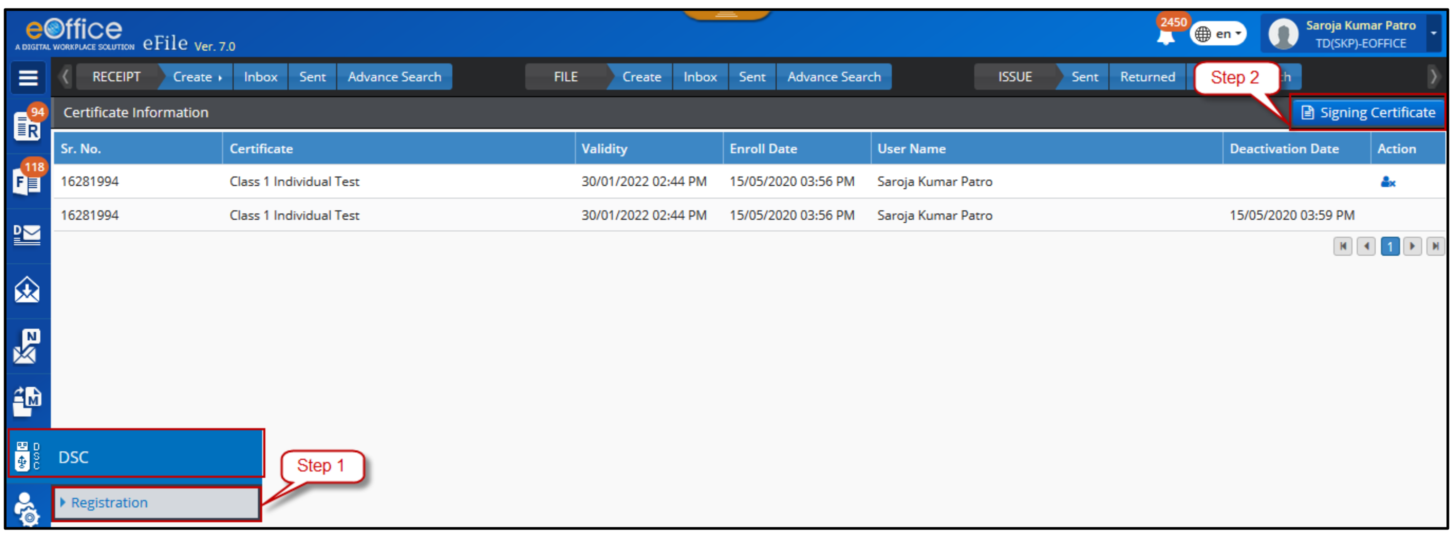


Figure 435

2. Click on **'Signing Certificate'**.
3. Select the certificate in DSC Enrollment popup and click "**Register**".
4. Enter the PIN for DSC and click on **OK**. DSC is registered successfully
5. Click on OK to complete the registration process.

Note:

- Registered DSC user will be available in the list of Certificate Information page.
- By Default, Signing feature will be enabled (DSC required while forwarding a file.)
- User will not be able to re-register with the same certificate if already registered and is active.

Activate/Deactivate Registered DSC

Important Points:

- ✓ DSC must be registered in Users eFile account.

STEPS TO FOLLOW:

1. Click ‘**Registration’** link under **DSC** Module to open Certificate Information Page.

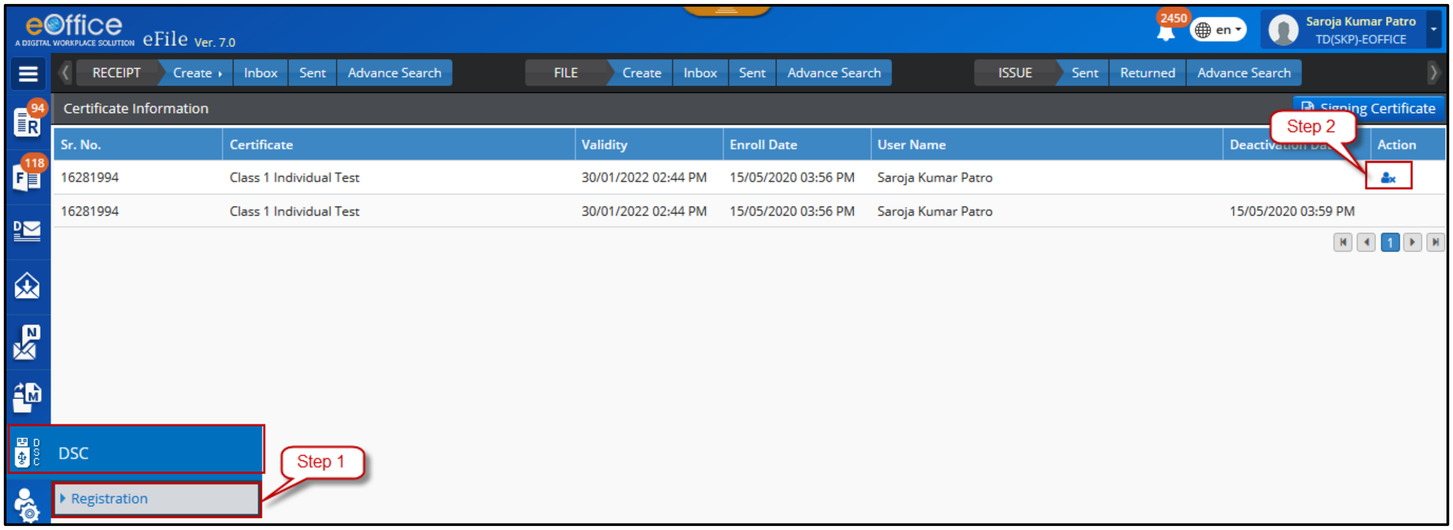


Figure 436

2. Click Activate Icon (For Deactivated DSC) or Deactivate Icon (For Active DSC) corresponding to registered DSC.
3. Click **OK** in Confirmation Popup.

Note:

- Record of Registered DSC user will be available in the list of Certificate Information page.

Transfer

This section describes the process of ‘Transferring of File(s) and Receipt(s)’ from one post to another (with an option to share sent list), required to handover the files and receipts in case scenarios such as employee’s transfer, promotion and superannuation.

Important Points:

- ✓ This feature is available with the user assigned with **‘ADMINISTRATOR’** privileges or **‘Role_Transfer_Within_Department’** role only. Any other user will not have access to this feature.
- ✓ User with ‘**Administrator’** privileges can transfer files and receipts of employees post within the instance i.e. inter and intra department.
- ✓ User with **‘Role_Transfer_Within_Department’** role can transfer files and receipts of employees post within same department only (i.e. Intra Department).

STEPS TO FOLLOW:

1. Under **‘Settings’** module, click on **‘Transfer’**.

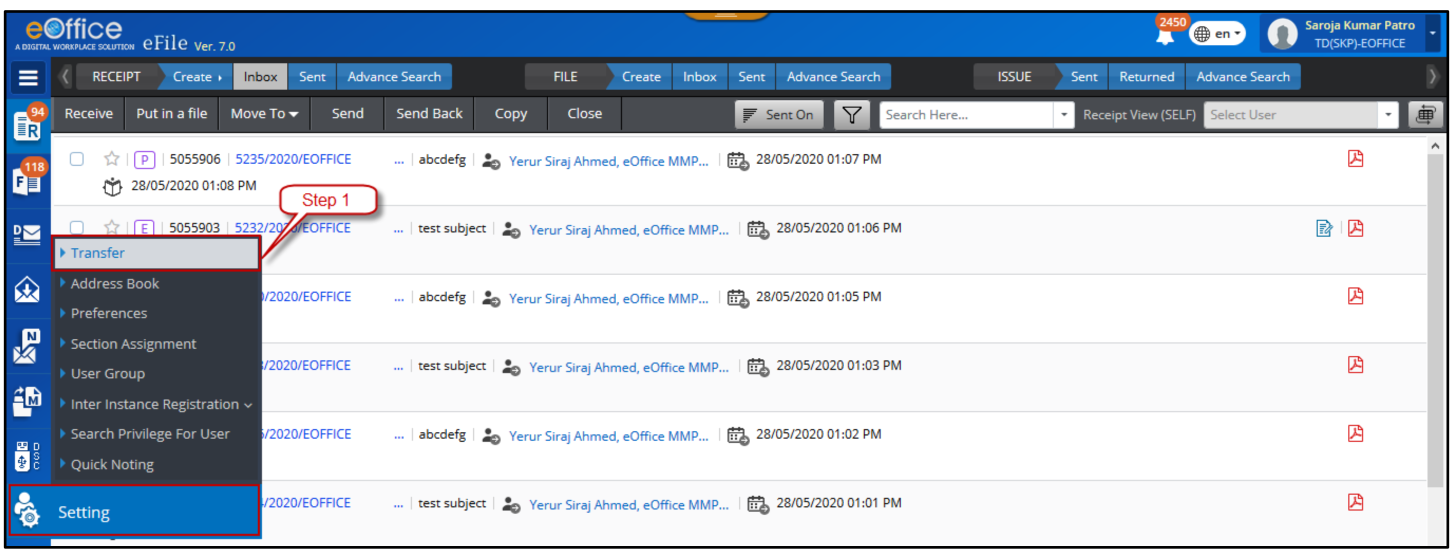


Figure 437

2. Select **‘Transfer from’** details of the employee from whom Files/Receipts are to be transferred. **‘Department From’** – Employee’s Department name,

   ‘Section From’ – Employee’s Office/Section name and

   ‘Transfer From’ – Employee’s Name

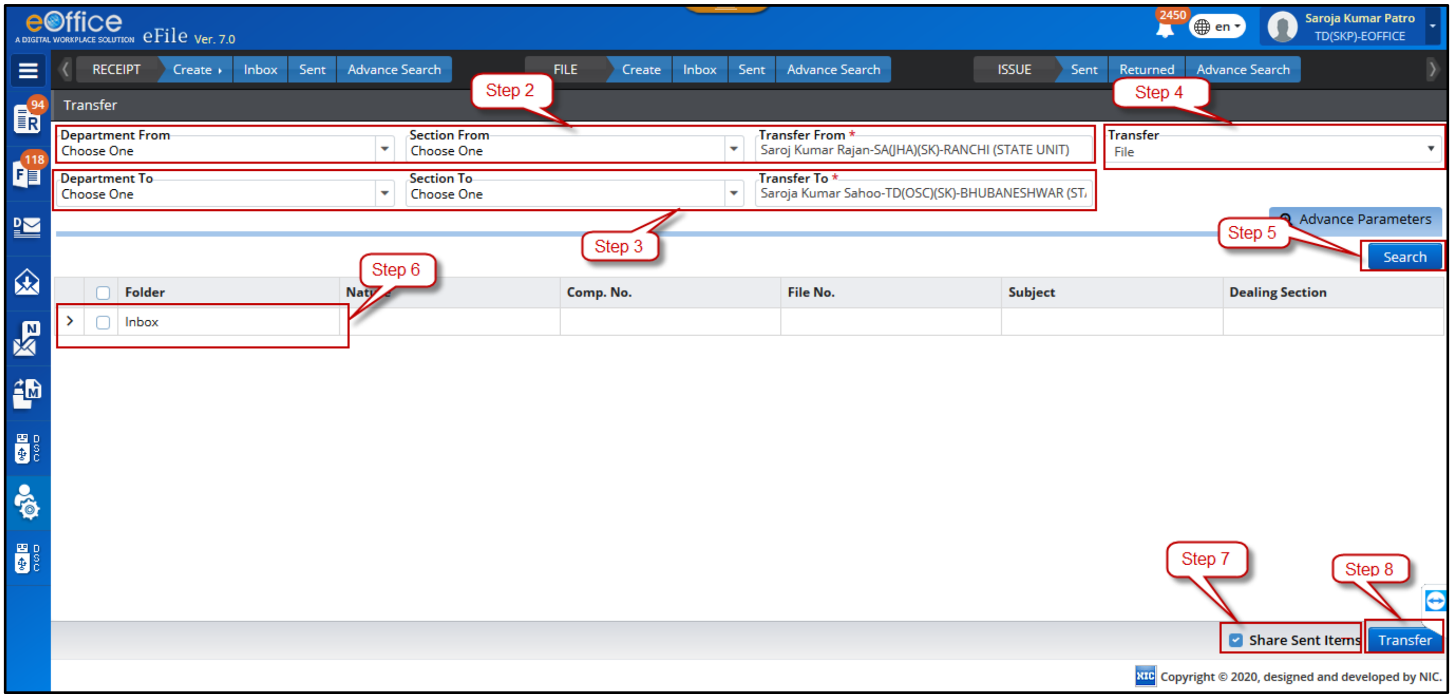


Figure 438

3. Select **'Transfer to'** details of employee to whom File/Receipts are to be transferred. **'Department To'** – Employee's Department name,

   'Section To' – Employee's Office/Section name and

   'Transfer To' – Employee's Name
4. Select **'Transfer'** type as **'File'** to transfer file(s) or **'Receipt'** to transfer receipt(s).
5. Click on **'Search'** button to view list of available File(s)/Receipt(s) from the **'Transfer From'** employee post.
6. Select the File(s)/Receipt(s) from the search result to be transferred.

Note:

- Select all Files/Receipts in case all of the records are to be transferred to a single employee post.
- Selective records can be chosen one at a time to transfer only a set of required records to another employee post and repeat the process with other set to selective records to transfer to other employee post(s).

7. Select **'Share Sent Items'** in case the **'Sent'** list of the **'Transfer From'** employee post is also to be shared.
8. Click on **'Transfer'** button.
9. In the confirmation pop-up box, upload the **'Transfer Document'** i.e. official document requesting for employee's handover/transfer order.

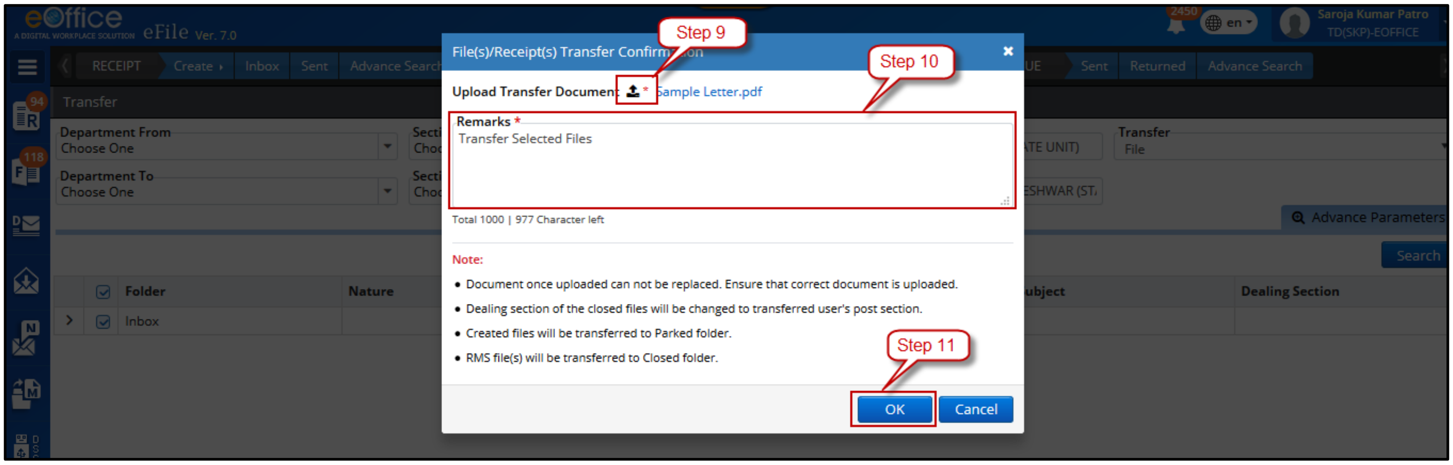


Figure 439

Note:

- Document once uploaded cannot be replaced. Ensure that correct document is uploaded.
- Dealing section of the closed files will be changed to transferred user's post section.

10. Provide **mandatory transfer remarks**.
11. Click **'OK'** to finalize the transfer of selected File(s)/Receipt(s).

Note:

- The **'Transfer Remarks'** and **'Transfer Document'** will be visible in File(s)/ Receipt(s) movement details.
- Receipt(s)/File(s) Transferred from Inbox/Inbox Folder will move to Receipt/File Inbox of recipient with Unread (for electronic) / Unreceived (for physical) state.
- Shared Sent Items will be displayed in Show Shared Sent Dropdown List of Sent list of File/Receipt.
- Receipt(s) Transferred from Created Folder will move to Receipt Created folder of recipient.
- Receipt(s)/File(s) transferred from Closed Receipts folder will move to Closed Receipts folder of recipient.
- File(s) Transferred from Created Folder will move to File Parked folder of recipient.
- File(s) Transferred from Parked will move to Parked Folder of the recipient.
- File(s) Transferred from Conversion Draft should move to File Inbox of recipient with its draft state discarded. (User will be prompted "Conversion state of file will get discarded" while transferring file in Conversion draft folder)
- Files to be transferred if listed in Conversion Draft folder, Files submitted for Closing and Reopening Approval will revert and displayed under their original source folder as given below:
    - Files in **Conversion Draft** list will move to **Inbox**.
    - Files in **Files submitted for Closing Approval** list will move to **Inbox**.
    - Files in **Files submitted for Reopening Approval** list will move to **Closed (By Me)** list.

Address Book

The address book is a book used for storing entries called contacts. Each contact's relevant information like Name, Designation, Address, Contact information and etc. is maintained in an address book. The address book makes it easy to retrieve the contact details while diarisation and maintaining list of recipients while preparing 'Draft for Approval'/External communication/Dispatch.

This section describes the steps to add contacts to address book and preparing groups of contacts from address book.

Adding Contacts to Address Book

Important Points:

- ✓ User must have necessary privileges for accessing Address Book or Diary page in eFile.
- ✓ User must have necessary role to add VIP contact
- ✓ Address book Levels must be assigned.
- ✓ **Scopes in Address book** –

  There are four levels/scopes of address book available which define its creation and availability under that domain only. These four scopes are –

  Self – Add and available to user who added only.
  Section – Added by a user and available to the user's section/office users also.
  Department – Added by user and available to the user's department users also.
  Instance – Added by user and available to all of the users in the entire organization.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.

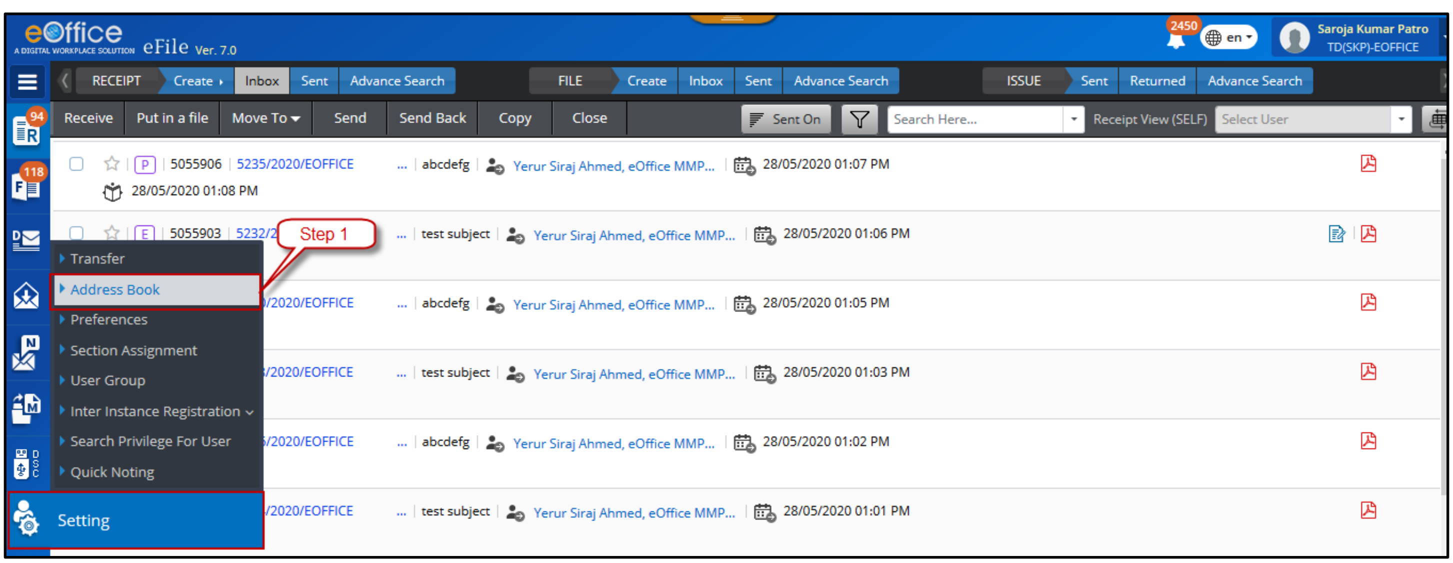


Figure 440

2. Under **'Contacts'** tab, click on **'Add Contact'**. Add contact form opens on right side of the window.

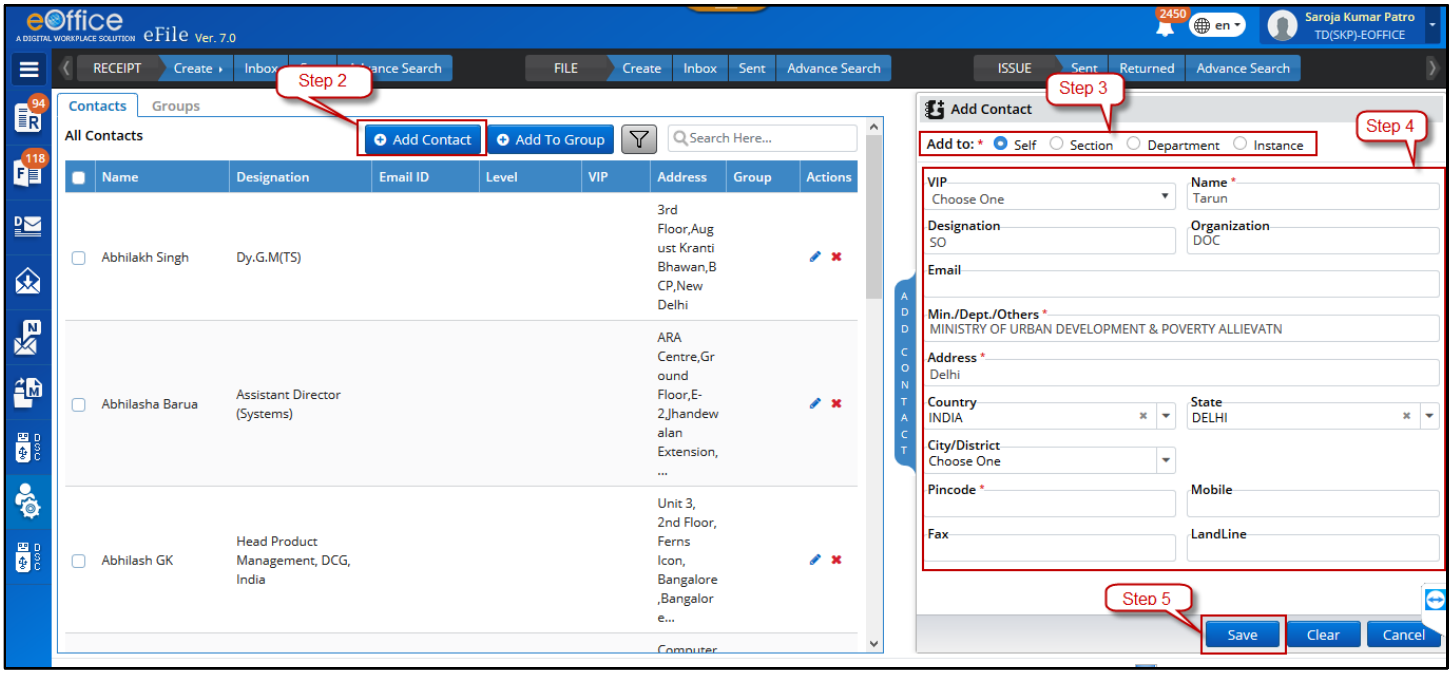


Figure 441

3. Select **'Add To'** Address Book Level/Scope.

4. Fill in the Contact Details. (Name and Address field mandatory for NON-CRU users).

5. Click on **'Save'** to create the new contact.

Alternatively: Adding Contact Details from Receipt Diary Page:

1. Under **'Browse & Diarize'** in **'Receipts'** module, click on **'Electronic'** or click on **'Electronic'** under **'Create'** link in Quick Access Menu bar. This will redirect to **'Diary'** page.

2. Upload the scanned copy (PDF format only) of the inward document. (**Mandatory*** in case of **'Electronic'** option only.)

3. Enter the diary details corresponding to the inward letter, categorized as **'Diary Details'**, **'Contact Details'** and 'Subject **Category'**.

4. In **Contact Details** select Add to Address Book checkbox.

5. After adding **'Contact Details'**, click on **'Address book'** icon, next to **'Name'** field and choose the required scope of **'Address Book'**.

6. Click on **'Generate'** or **'Generate & Copy'** or **'Generate & Send'** to generate new electronic receipt with a unique **'receipt number'**.

Note:

- Contact person details will be displayed as autofill suggestions while entering name during diarization.
- User will be able to **Search** and **Add** the existing contact under Public recipient (User) category of recipients while preparing 'Draft for Approval'/Dispatch.

Editing Contacts in Address Book

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.
2. Under **'Contacts'** tab, search the contact (based on name, designation, etc.) to be edited using search bar. (If required, scope of the contact can be chosen from filter view to narrow down the search results)
3. From the list of contacts visible below, click on **'Edit'** action button against the contact you wish to edit.
4. Make necessary changes to the contact details visible on the right side of the screen.
5. Click **Update** to save the necessary changes.

Deleting Contacts in Address Book

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.
2. Under **'Contacts'** tab, search the contact (based on name, designation, etc.) to be edited using search bar. (If required, scope of the contact can be chosen from filter view to narrow down the search results)
3. From the list of contacts visible below, click on **'Remove'** action button against the contact you wish to delete.

Or

4. Select multiple contacts and click on **'Delete Contact'** to delete multiple contacts.
5. In the pop-up confirmation box, click on **'OK'** to confirm and delete the contact(s).

Creating Address Book Groups

Important Point:

✓ **Scopes in Address book** –

There are four levels/scopes of address book available which define its creation and availability under that domain only. These four scopes are –

Self – Add and available to user who added only.
Section – Added by a user and available to the user's section/office users also.
Department – Added by user and available to the user's department users also.
Instance – Added by user and available to all of the users in the entire organization.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.
2. Under **'Groups'** tab, click on **'Add Group'**. Add group form opens on right side of the window.

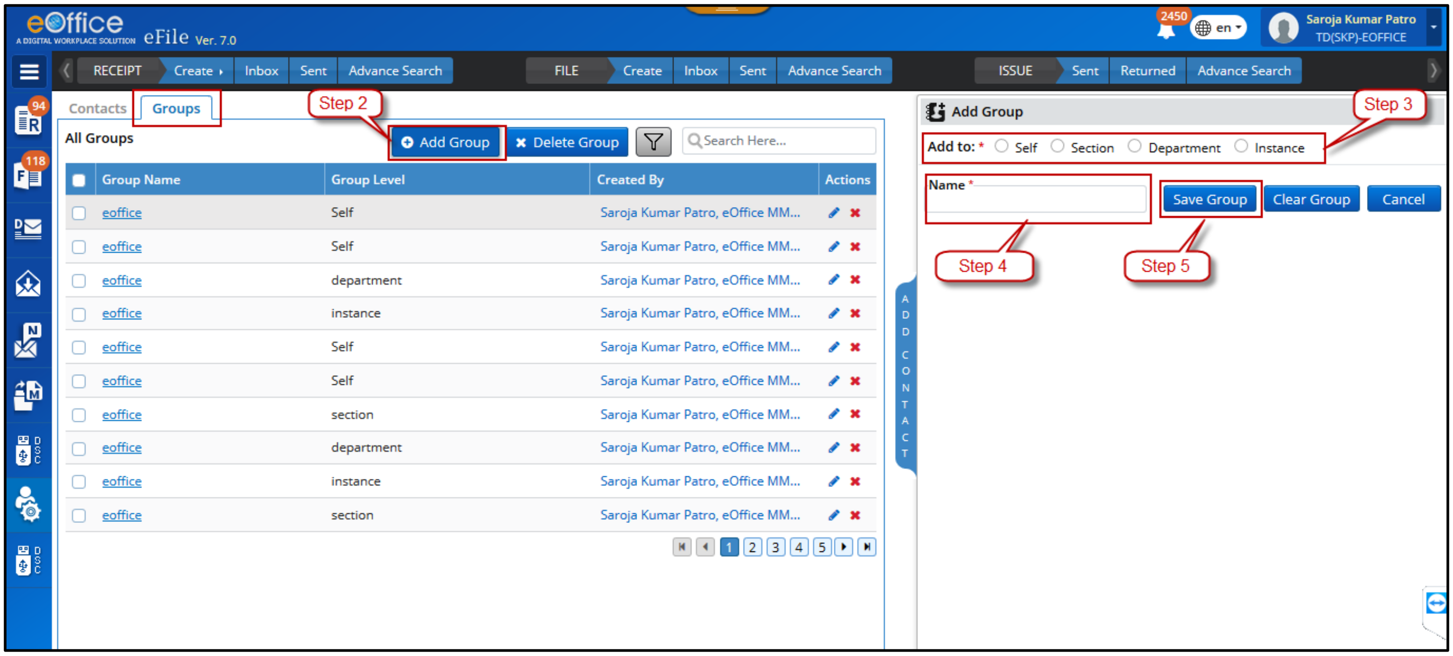


Figure 442

3. Select **'Add To'** Address Book Level/Scope. (Refer Important points above)
4. Fill in the name of the group to be created.
5. Click on **'Save Group'** to create the new group.

Note:

- Newly created Group will be saved to Address Book.
- Newly created Group will be displayed under 'Add to Group' drop down list in Contact Details list page.
- User will be able to search and select Created Group under Public recipient section (Group) during dispatch process.

Adding Contacts to Group in Address Book

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.
2. Under **'Contacts'** tab, search the contact (based on name, designation, etc.) to be edited using search bar. (If required, scope of the contact can be chosen from filter view to narrow down the search results)
3. Select the contact(s) you wish to add to a group.
4. Click **Add to a Group**.

5. In the pop-up box, choose the name of the group to which you wish to add contacts and click **OK**.
6. In the confirmation pop-up box, click on **'OK'** to add the contact(s) to the group.

Editing Group name in Address Book

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.
2. Under **'Groups'** tab, search the group to be edited using search bar. (If required, scope of the group can be chosen from filter view to narrow down the search results)
3. From the list of group(s) visible below, click on **'Edit'** action button against the contact you wish to edit.
4. Make necessary changes in the contact group details visible on the right side of the screen.
5. Click on 'Update Group' to save the necessary changes.

Deleting Group in Address Book

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Address book'**.
2. Under **'Groups'** tab, search the group to be deleted using search bar. (If required, scope of the contact can be chosen from filter view to narrow down the search results)
3. From the list of contacts visible below, click on **'Remove'** action button against the group you wish to delete.

Or

4. Select multiple groups and click on **'Delete Group'** to delete multiple groups.
5. In the pop-up confirmation box, click on **'OK'** to confirm and delete the group(s).

Preferences

The purpose of the 'Preferences' is to enable users to configure certain views and alerts in user settings as per user to user convenience. This section describes how to set user preferences and the various preference options available.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Preferences'**.

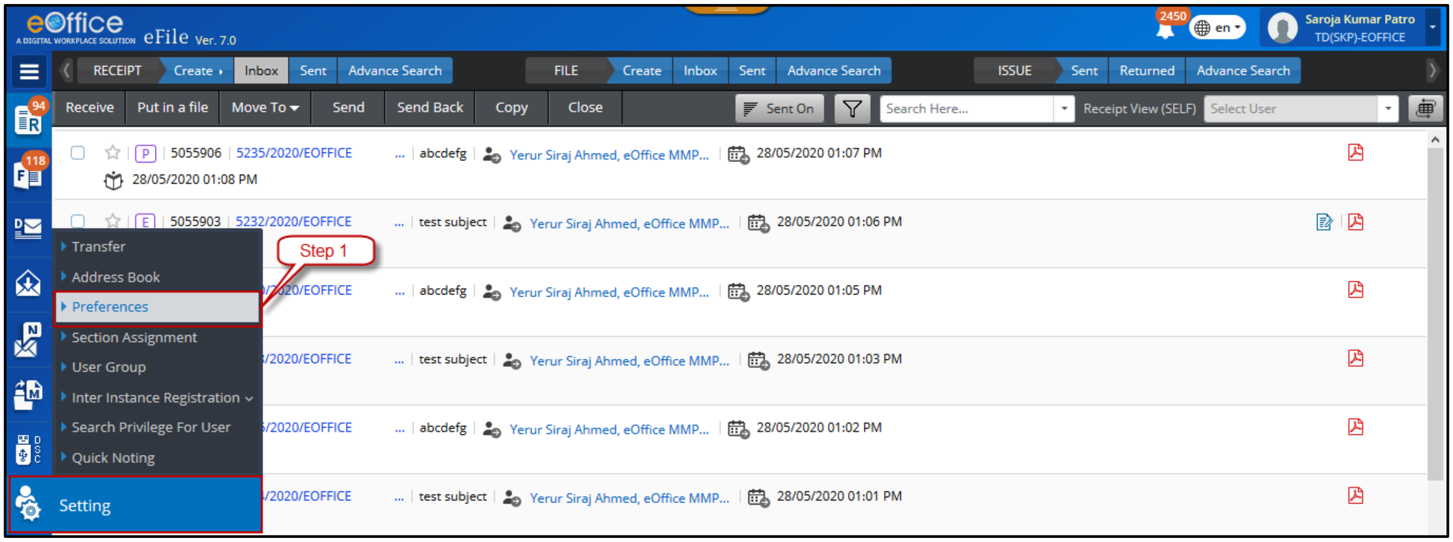


Figure 443

2. Choose the required options as per your preferences. (For details, refer below)

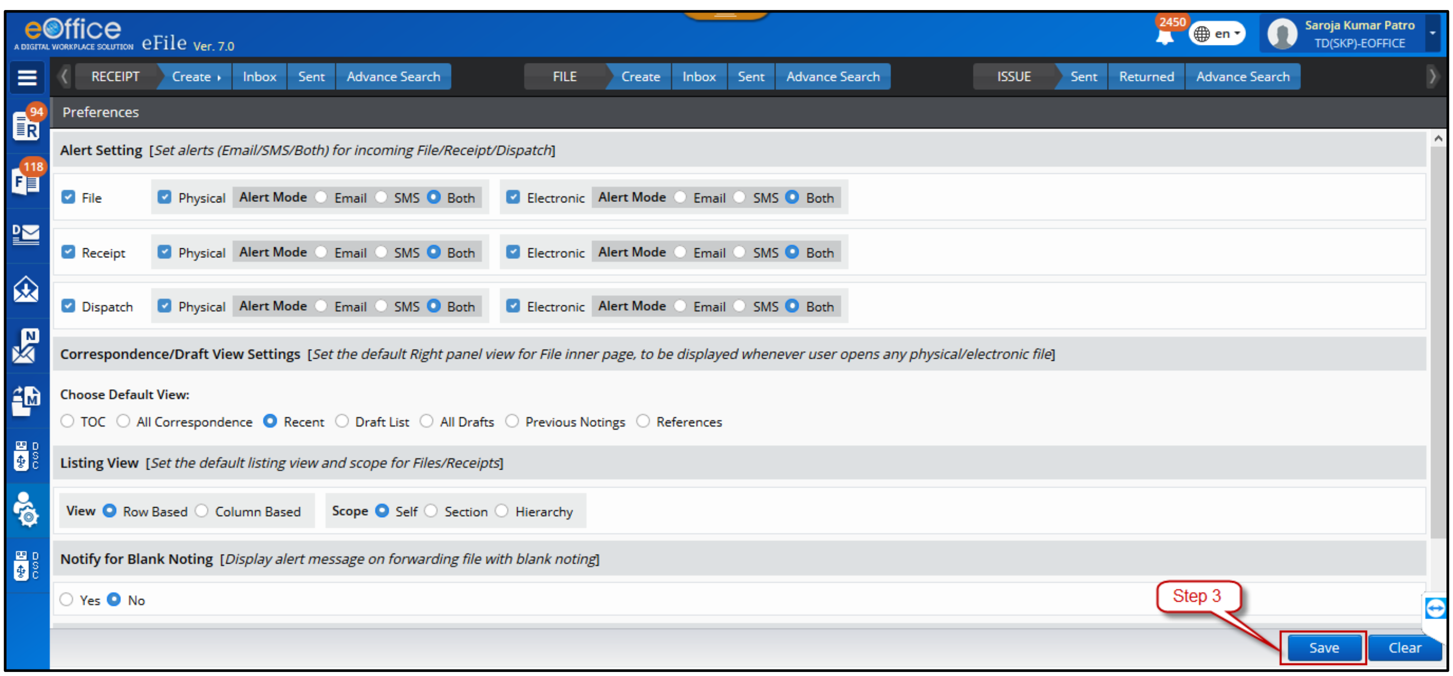


Figure 444

3. Click on **'Save'** Button.

Preferences in Detail –

1. **Alert Settings** – The alerts can be enabled for the incoming Files, Receipts and Dispatches. The alert modes available are 'Email' only, 'SMS' only and 'both' and can be set independently for physical and electronic files, receipts and dispatches.

   For example, as shown in **Figure 444**, for incoming physical files the alert mode is set to 'SMS' and for electronic files it is set to 'Both' Email and SMS.

   Whereas alerts for receipts (physical and electronic) are disabled by unchecking receipts altogether.

   For physical incoming dispatches the alerts are disabled by unchecking 'physical' option against it whereas 'Both' Email and SMS alerts are enabled for incoming 'Electronic Dispatches'.

2. **Correspondence/Draft View Settings** - The right side view of the electronic file inner page can be set to default to any one of the following views –

   a. **TOC** – Table of contents view for the list of correspondences

   b. **All Correspondence** – A combined 'PDF' view of all the correspondences attached in a file.

   c. **Recent** – The 'PDF' view of the last correspondence attached to the file.

   d. **Draft List** – The 'List of Drafts' view of all the drafts present in the file.

   e. **All Drafts** – A Combined PDF view of all Drafts attached in File.

   f. **Previous Notings** – The view of the previous notes in the file.

   g. **References** – The list of all the references attached as annexure with the file.

Note:

- The above mentioned preferences for **'Correspondence/Draft View Settings'** are for Electronic files only. The Physical files will display TOC for any Correspondence/Draft view settings chosen except for references which will show list of all references attached as annexure.
- By default, **'Recent'** is selected in **'Correspondence/Draft View Settings'**.

3. **Listing View –** The preference view of the list of records of receipts and files available in user's Inbox.

   a. **View –**

   Row Based – The row-wise list of records of 'Files' and 'Receipts' unlike details of records stacked in a columnar approach. This gives better on-screen space utilization for displaying maximum records.
   Column Based – The traditional column-wise list of records for 'Files' and 'Receipts' where the details of the records are stacked in a columnar approach.

b. **Scope** – The list view of the files/receipts records available in user's Inbox as per the following scopes available –

Self – List of signed-in user's records only
Section – List of signed-in user's records along with the records of other users of the same section/office.
Hierarchy – List of logged in user's records along with the records of other users in the hierarchy of the signed-in user.

Note:

- The 'Section' and 'Hierarchy' scope of the listing scope as mentioned above only gives the records view of receipts/files available in the Inbox of the users of the same Section/Office and users in the hierarchy of the signed-in user respectively. The view does not allow the user to click open to view further details inside. The contents of the receipts/files can only be checked by the user with whom it is available/present.
- By Default **'Row-Based'** view and **'Self'** scope is selected in the listing view.

4. **Notify for Blank noting –** Enabling this will give an alert message when forwarding a file with a blank note. This alert is required in case the user forgets to add note to file before forwarding or when unintentionally the content is deleted completely.
5. **PDF Viewer –** This preference enables user to choose whether to view the respective PDFs using the PDF viewer of the eOffice application or the one available with the browser.

Section Assignment

Important Points:

✓ This feature is available with the user assigned with **'ADMINISTRATOR'** privileges only.

The **'Section Assignment'** is the transferring of the dealing rights on a file or set of files from its current dealing section to other section. It is the changing the ownership on the file(s) and its closing/re-reopening rights. This is required in case-scenarios where,

- A specific case-file or subject(s) head has been reassigned to some other section/office/unit.
- The two section/units are merged into one therefore changing the ownership of the files to the new section/unit created.
- A section/unit is divided into two on the aspect of better administration and hence dividing the work allocation and assigning new ownership rights of the case-files.
- This section describes the steps to reassign the dealing rights to another section of the files searched on the basis of file/computer number, subject, subject category or the file subject-heads.

STEPS TO FOLLOW:

1. Under '**Settings**' module, click on 'Section Assignment'.

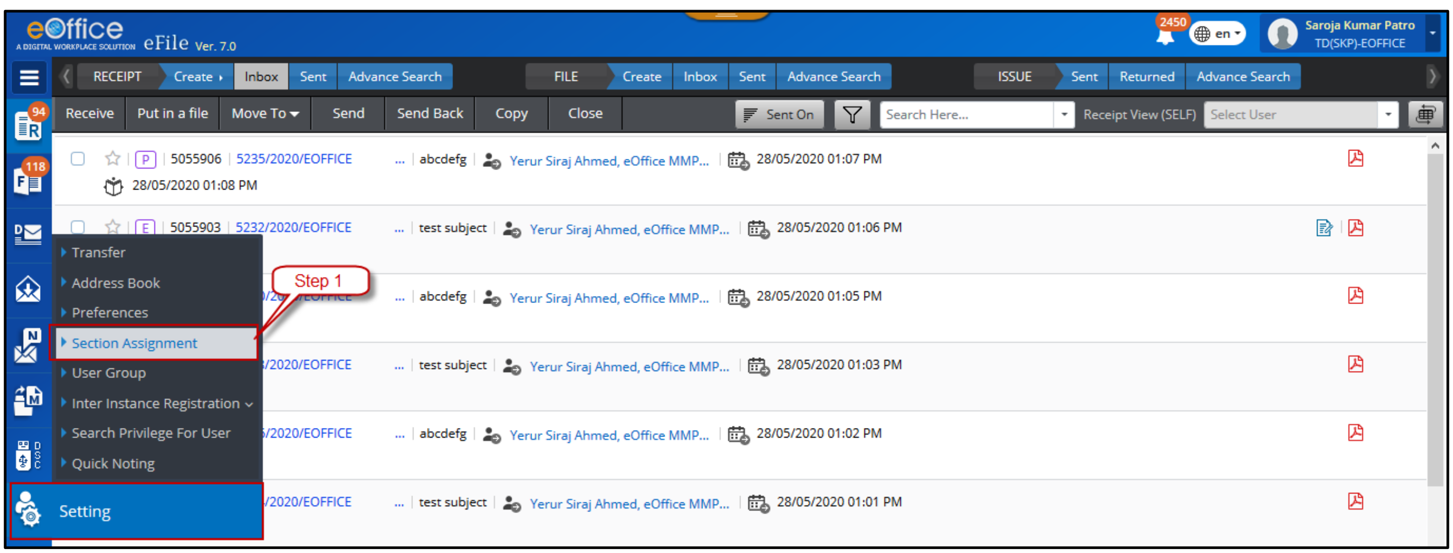


Figure 445

2. Select Department and Dealing Rights From (section name from which dealing rights are to be transferred) by clicking on Combo-box.

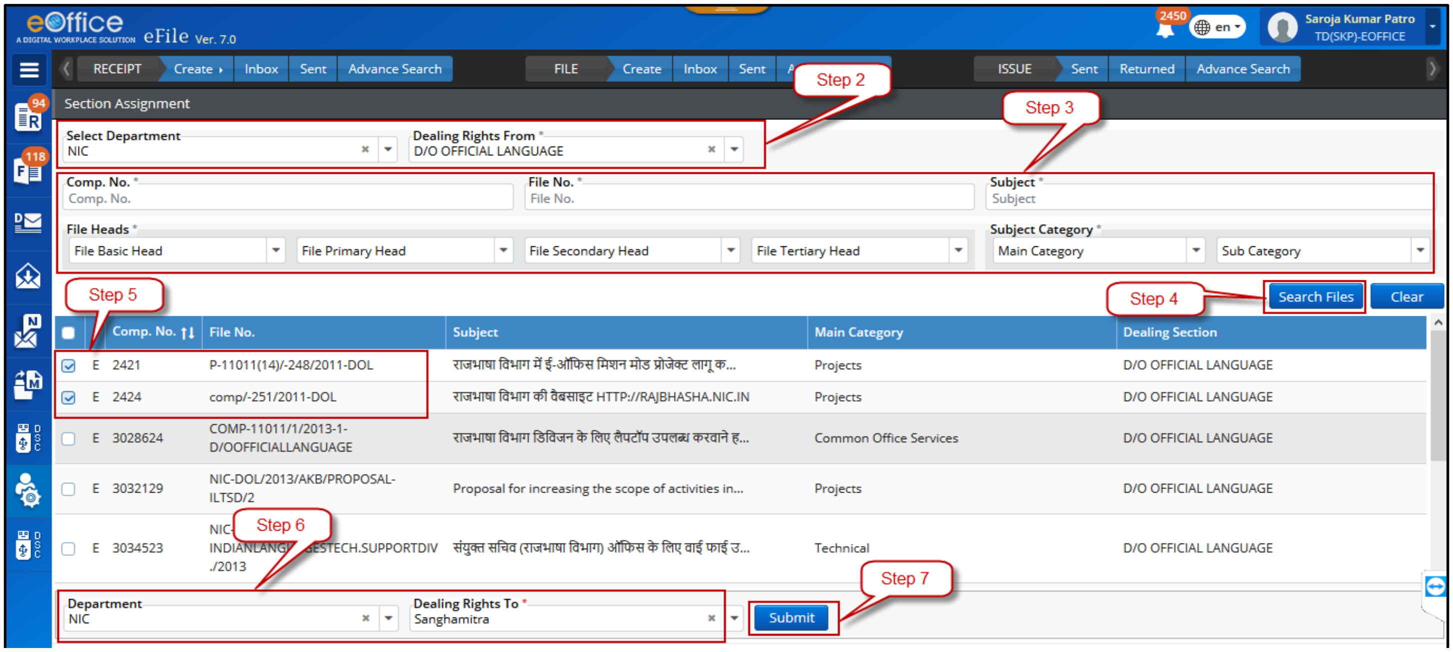


Figure 446

3. Search required Files on the basis of File No. /Computer No. /Subject Description /Subject category /File Heads.
4. Click **Search** Button.
5. Select File(s) who's Dealing rights need to be re-assigned to another section/office/unit.
6. Select Department and Dealing Rights To (section name to which dealing rights are to be transferred) by clicking on Combo-box.
7. Click **Submit** Button.
8. Click **OK** in the pop-up confirmation box.

User Group

The **'User Group'** is referred to the group of employees created to make the marking of copy of a receipt convenient to a group of people within an organization. This is done by selecting all or selected employees in a group while forwarding a receipt. Refer below for the steps to create a group and adding the employees to the group.

Creating User Group

This section describes the steps to create a user group.

Important Point:

✓ User must have role to create group for Section, Department and Instance.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'User Group'** and the list of already created groups (if any) is visible.

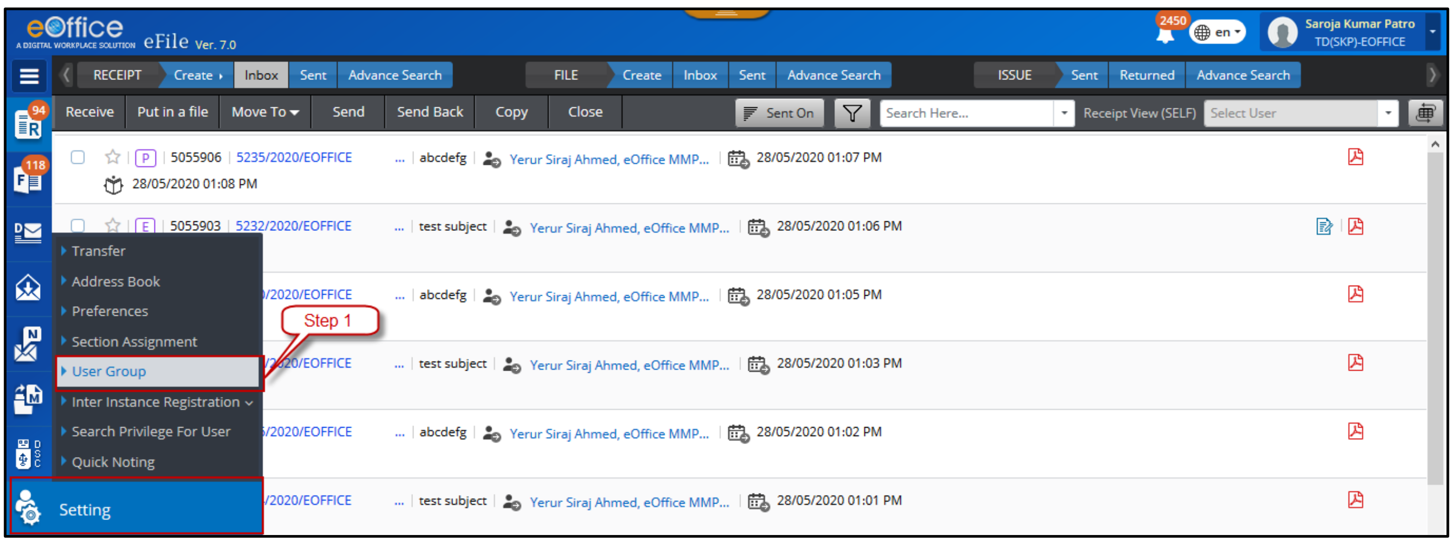


Figure 447

2. At the bottom right corner of the screen, click on '**Create Group'** and create group pop-up box will appear.

3. In the pop-up box, select the **'Scope'** at which the group to be created should be visible**.**

Note:

- There are three types of scope defined –

  Section – If the group should visible to the others users of the same section/office only.

  Department – If the group should be visible to the users of the same department only.

  Instance – If the group should be visible to all the users of the entire organization.

4. Enter required '**Group Name'** and its **'description'**. (both fields are mandatory*)

5. Click on '**Save**' to create the **'User Group'**.

Note:

- The user groups are visible while sending a receipt and entering 'CC' details. To select the user(s) in CC from group, user must click on CC field and under the group tab, choose required group name and select the name of the users from the group.

Adding Users to User Group

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'User Group'** and the list of already created groups (if any) is visible.
2. Search by group by name (use filter if required) to which you wish to add users and click on its name.
3. At the bottom right corner of the screen, click on **'Add Users'** and add users pop-up box will appear.
4. Search User(s) you wish to add to the group by using input parameters such as Department, Section, Users (employee name) details and click on **'Search'.**

Note:

- Input Parameters available are –

  Department – Select department name and click on search to list all employees in that department.

  Department and Section – Select department and section within to list all employees in that section.

  Users – Search employee by name

- At least any one of the above mentioned parameters is mandatory* to use search parameters.

5. Select user(s) from searched output list to be added to the group.
6. Click on '**Add User**'.

Adding User in CC Field from User Groups

STEPS TO FOLLOW:

1. In the receipts module, click on **'Inbox'**, or **'Created'** from which the receipt is to be forwarded.
2. Select the receipt and click on **'Send'.**
3. Click in '**CC'** field of receipt send page. (Group Tab will be Displayed)
4. Click on **Group** tab to display list of all created groups Scope wise.
5. Select Scope using Radio button (Self, Section, Department, and Instance).

6. Click User Group Name to display User(s) within selected group. (*User can search user group using **'Search bar'** provided*)
7. Select User(s) using check box to Add user(s) to the CC field.(*User can search User(s) using **'Search bar'** provided*)
8. Selected User(s) should be added in CC field of Receipt Send page.

Inter Instance Registration

This section describes the steps to register an instance of eOffice with another instance for facilitating the exchange of files between the two instances (Organizations/Ministries).

Important Points:

- ✓ This feature is available with the user assigned with 'ADMINISTRATOR' privileges only.
- ✓ Under Instance Registration Details, the Central Repository of eOffice Instances of Organizations/Ministries will be available for Inter-Instance Registration process. (***Note:** This will display list of all eOffice Instance (excluding Locally Hosted Instances) available for Inter Instance Movement of File*)

Sending the request for Inter Instance Registration

STEPS TO FOLLOW:

1. Under 'Settings' module, click on 'Inter-Instance Registration' and then 'Instance Registration Details'.

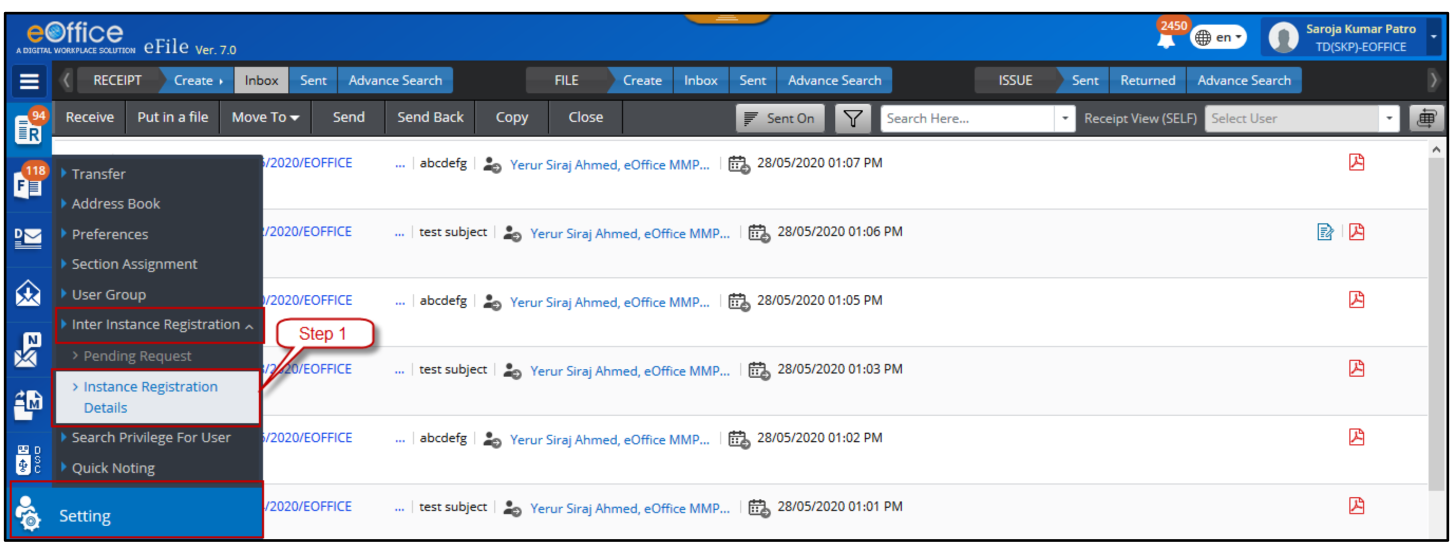


Figure 448

2. List of Central Repository of eOffice Instances of Organizations/Ministries will be available for Inter-Instance Registration process.

3. Click on Register ( ) icon, against the respective organization/ministry name available for inter-instance registration.
4. Enter the mandatory* remarks in the pop-up box and click on 'OK'.
5. Request is sent to the requested instance for approval.

Note:

- The request for inter-instance registration will be approved by the administrator of the respective organization/ministry for which the request has been placed.

Accepting/Rejecting the request for Inter Instance Registration

STEPS TO FOLLOW:

1. Under 'Settings' module, click on 'Inter-Instance Registration' and then 'Pending Request'.

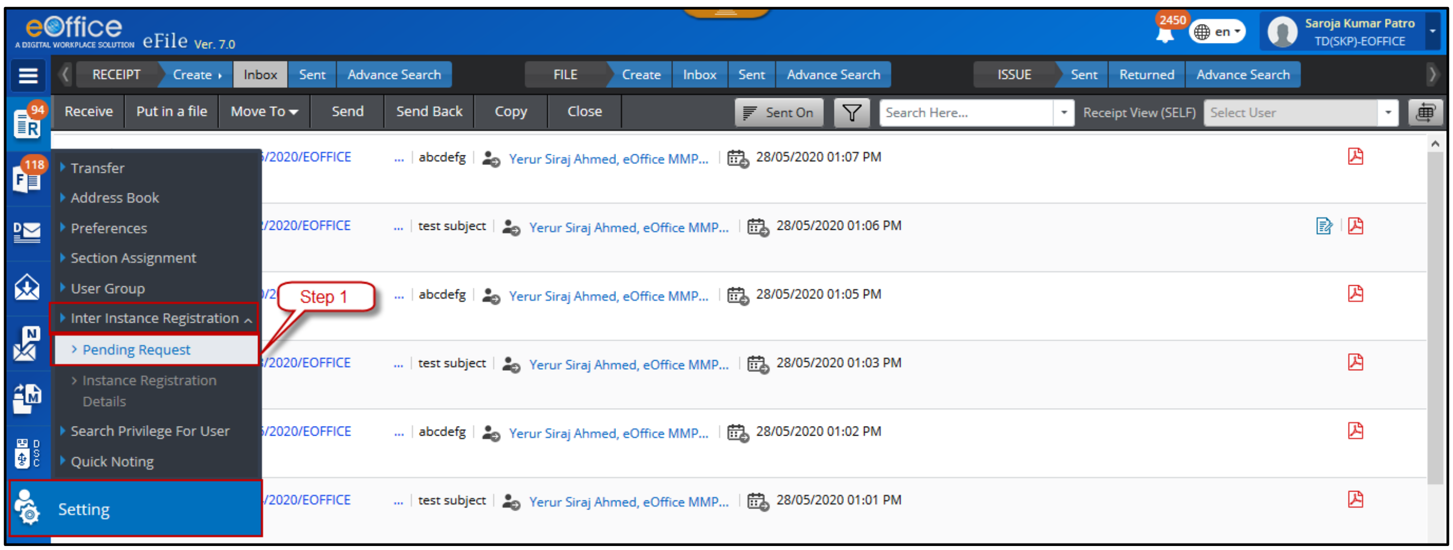


Figure 449

2. List of requests from various organizations/ministries is visible pending for action.
3. Click on Accept/Reject icon, against the respective organization/ministry name available for inter-instance registration.
4. Enter the mandatory* remarks in the pop-up box and click on 'OK'.

Cancelling the request for Inter Instance Registration

STEPS TO FOLLOW:

1. Under 'Settings' module, click on 'Inter-Instance Registration' and then 'Instance Registration Details'.
2. Click on 'Cancel' ( ) icon, against the respective organization/ministry name.

Note:

- The cancel option is available for organization(s)/ministries for which the request for inter-instance registration has already been placed and with status pending for approval.

3. Enter the mandatory* remarks in the pop-up box and click on **'OK'.**

De-registration of Instance

STEPS TO FOLLOW:

1. Under 'Settings' module, click on 'Inter-Instance Registration' and then 'Instance Registration Details'.
2. Click on 'De-register' ( ) icon, against the respective organization/ministry name.

Note:

- The de-register option is available for organization(s)/ministries for which are already registered for inter-instance movement i.e. with status 'Approved' for inter instance movement.

3. Enter the mandatory* remarks in the pop-up box and click on **'OK'.**

View History of Instance Registration

STEPS TO FOLLOW:

1. Under 'Settings' module, click on 'Inter-Instance Registration' and then 'Instance Registration Details'.
2. Click on 'View History' ( ) icon, against the respective organization/ministry name.

Note:

- **View History** Icon should be available for all instances with any status except for a fresh request.
- In a pop-up box, the history of various actions performed on registration of the respective Instance will appear.

Search Privilege

Important Points:

- ✓ This feature is available with the user assigned with **'ADMINISTRATOR'** privileges only.

The use of search system is required to provide users with search results that lead to relevant information in their daily tasks. For example, a user might want to search whereabouts of a file initiated in his/her own section in order to take follow up on its status.

Whereas another user might want to check out the whereabouts of a file which was not in his/her channel of submission.

The question here is, should this be allowed. One might say that it may only be allowed to be searched upon since the dealing section of that particular file comes under his/her administration however this may not be the case every time. Hence defining the scope of search for complete organization is required.

The **'Search Privilege'** is the defining of the scope of search for **'Files', 'Receipts'** and **'Issues'**,and can be set differently for **'Physical'** and **'Electronic'** entities**.** There are eight types of scope of search and action on them available as mentioned below –

S. No.	Scope Name	Description
1.	**Global**	It refers to domain of users of entire Ministry/Organization i.e. users of all of the departments created within the eOffice instance.
2.	**Department**	It refers to the domain of users of the signed-in user's Department only.
3.	**Section Hierarchy**	It refers to the domain of users of the signed-in user's own office/section and section(s)/office(s) in its hierarchy.
4.	**Section**	It refers to the domain of users of the signed-in user's own office/section.
5.	**Post Hierarchy**	It refers to the individual signed-in user and the individuals in user's direct post hierarchy.
6.	**Individual**	It refers to the individual signed-in user only.
7.	**Post Hierarchy And Section**	It refers to the individual signed-in user, the individuals in user's direct post hierarchy and section/office.
8.	**Post Hierarchy And Section Hierarchy**	It refers to the individual signed-in user, the individuals in user's direct post hierarchy, users of own office/section and office(s)/section(s) in its hierarchy.

The scopes mentioned above can be set in two ways –

- **Search Scope** – It defines the scope of search of physical/electronic Files, Receipts and Issues.

- **Action Scope** – It defines the scope of action (for example PULL-UP) that can be taken on the files, receipts and issues from the search results.

Let us understand with different case scenarios –

<u>Case Scenario I</u>

Search Scope – Department

Action Scope – Section

Explanation: Under this case scenario, a user can search the Files/Receipts/Issues of users of the same department however can only pull-up those which are with the users of his/her own section.

<u>Case Scenario II</u>

Search Scope – Section Hierarchy

Action Scope – Post Hierarchy

Explanation: Under this case scenario, a user can search the Files/Receipts/Issues of the user'sown office/section and section(s)/office(s) in its hierarchy. However, can only pull-up those which are with the users under his/her post's direct hierarchy.

These privileges can be defined in two ways but are not alternate to each other –

1. **For Instance** – This option is used to define the default search and the action scope for all of the users of the Ministry/Organization at once.
2. **User wise** – This option is used to exceptionally change the search and the action scope of specific user(s) from default values (as defined for the instance). For example, this may be required for particularly for a senior official in the administration to change action scope from section to department as discussed above in case scenario I, so that the person can search and pull-up a file from any individual of his/her department.

Setting Search Privilege For Instance

This section describes the steps to define **'Search Privilege'** for all users of a Ministry/Organization (i.e. for complete Instance).

Important Points:

✓ This feature is available with the user assigned with **'ADMINISTRATOR'** privileges only.

<u>STEPS TO FOLLOW:</u>

1. Under '**Settings** module, click on **Search Privilege for Instance**.
2. Select Search Scope and Action Scope for Physical and Electronic Records (Files/Receipts/Dispatch).
3. Click **Save** Button.

Note:

- Selected Search Scope and Action Scope should be applied to complete eOffice Instance.
- Search Privilege History should be maintained for all changes made in search/action scope.

Setting Search Privilege for User

This section describes the steps to define **'Search Privilege'** for a specific user.

STEPS TO FOLLOW:

1. Under Settings module, click on Search Privilege for User.

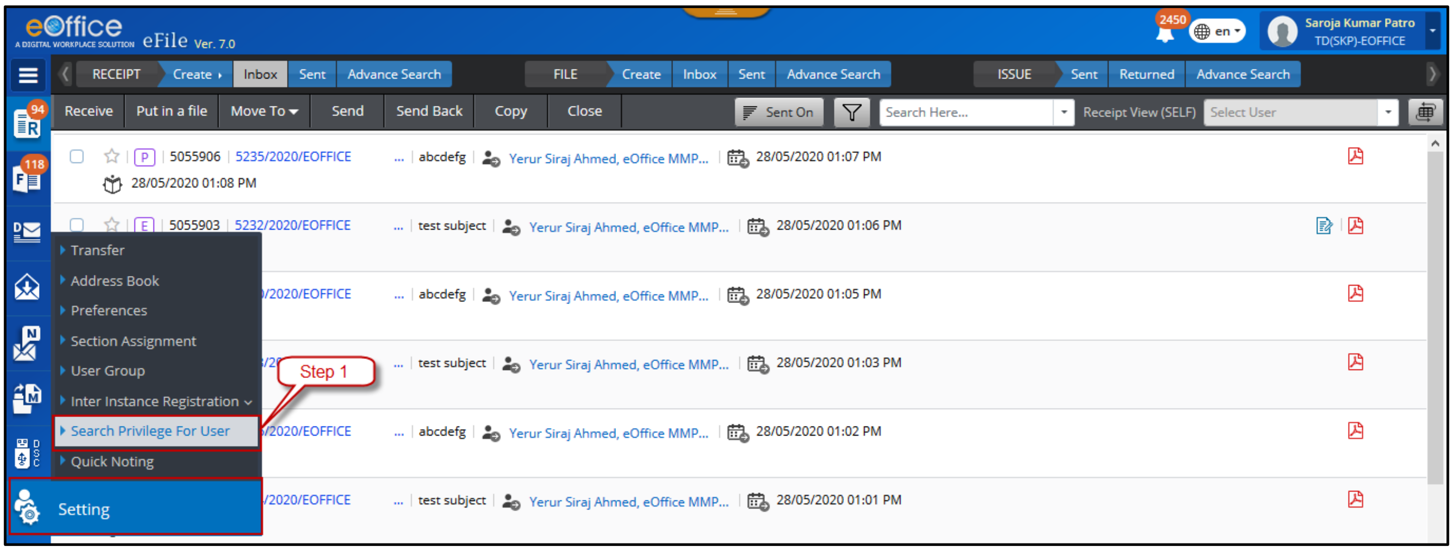


Figure 450

2. Click **All Users** tab.
3. Search the user using input search parameters (*User's Department & Section name and User's name*). The user's current search and action scopes are visible in search results.
4. Click on User's Name to open View/Edit Privilege page.
5. Select 'Search Scope' and 'Action Scope' for 'Physical' and 'Electronic' records respectively. (*Refer to table above for detailed explanation on scopes*)
6. Click **Add New Section**.
7. In the pop-up box, select the **'Department'** and its 'Section(s)' name required to be added under the scope and click on **'OK'**.
8. Click **Save** Button.

Note:

- Step 6 and 7 are optional in case the user wishes to add an out of scope section(s)/office(s) under the search scope of the user.

Adding Section/Office under current Search Scope

This section describes the steps to add an out of scope section(s)/office(s) under the search scope of the user.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Search Privilege for User'**.
2. Click on **'All Users'** tab.
3. Search the user using input search parameters (User's Department & Section name and User's name). The user's current search and action scopes are visible in search results.
4. Click on User's Name to open View/Edit Privilege page.
5. Click on **'Add New Section'**.
6. In the pop-up box, select the 'Department' and its 'Section(s)' name required to be added under the scope. Click on **OK** to add.
7. Click **Save** Button.

The record for such privileged users is maintained under 'Privileged Users' tab. It shows the list of users to whom search privilege has been assigned individually and the respective search and action scopes assigned.

Viewing User Search Privilege History

This section describes the steps to check the history of 'Search Privileges' set for the user.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Search Privilege for User'**.
2. Click on **'Privileged Users'** tab.
3. Search the user using input search parameters (User's Department & Section name and User's name). The user's current search and action scopes are visible in search results.
4. Click on **'History'** icon under actions to check the history of search privileges assigned in the pop-up box.

Removing User Search Privilege

This section describes the steps to remove the user's 'Search Privileges' set previously.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on **'Search Privilege for User'**.
2. Click on **'Privileged Users'** tab.

3. Search the user using input search parameters (User's Department & Section name and User's name). The user's current search and action scopes are visible in search results.

4. Click on **'Remove'** icon under actions to delete the search privileges previously assigned.

Note:

- Removing User's search privileges will set them back to default search privilege set for the complete Ministry/Organization (i.e. Search Privilege set for Instance).

Quick Noting

The quick notes are the most commonly used phrases while preparing notes in note sheet. These quick notes are available which when chosen are populated at the position of the cursor in the note. They are available in two ways –

1. **Standard** – List of quick notings provided as a standard list to the end-users

2. **User Defined** – Users can prepare their own list of quick notings

This section describes the steps to create user defined list of quick notings.

STEPS TO FOLLOW:

1. Under **'Settings'** module, click on '**Quick Noting'**.

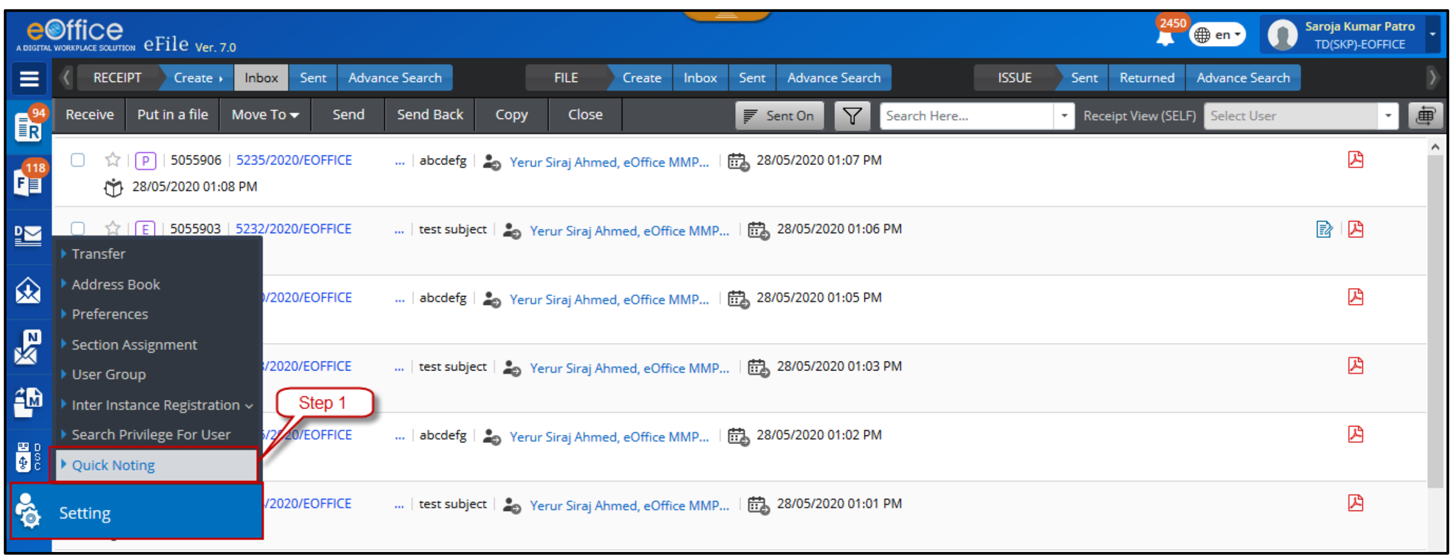


Figure 451

2. Click on '**Add Quick Noting'** at the bottom right corner of the screen.

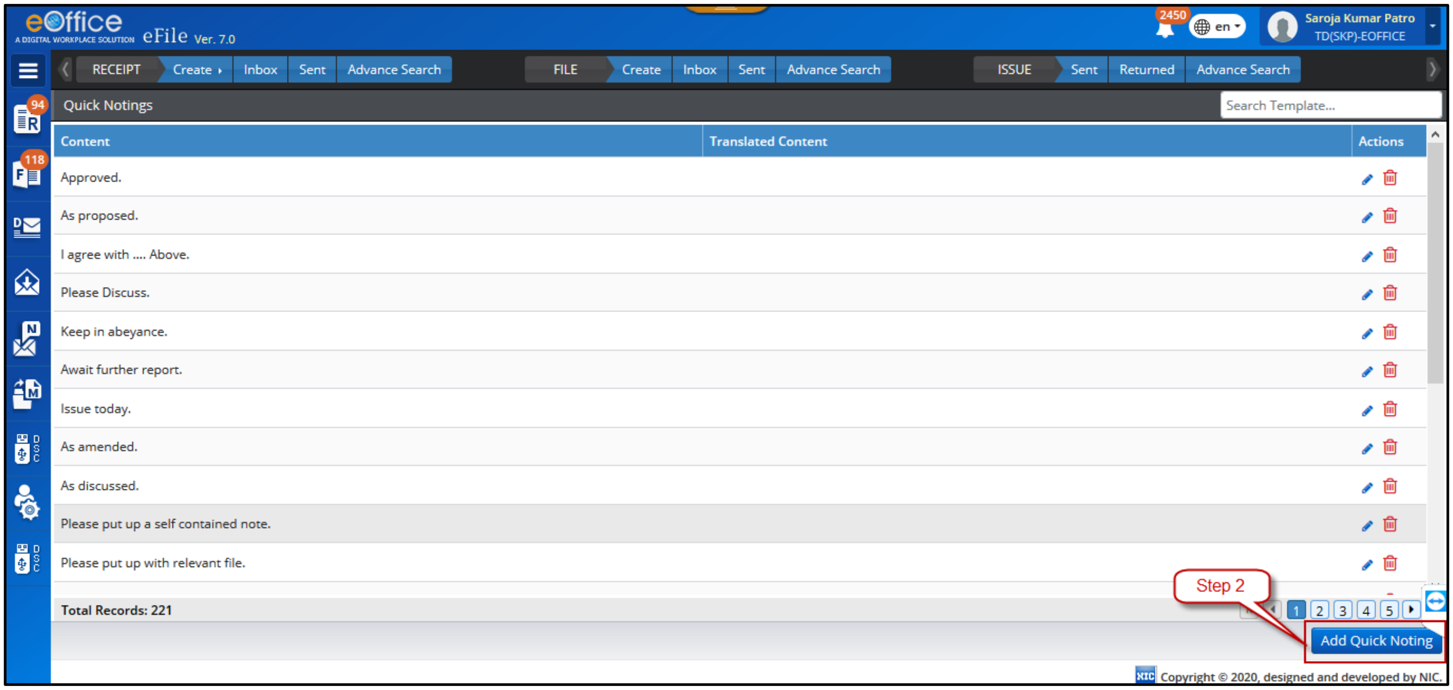


Figure 452

3. In the pop-up box, select **'Language'** for Quick Noting.

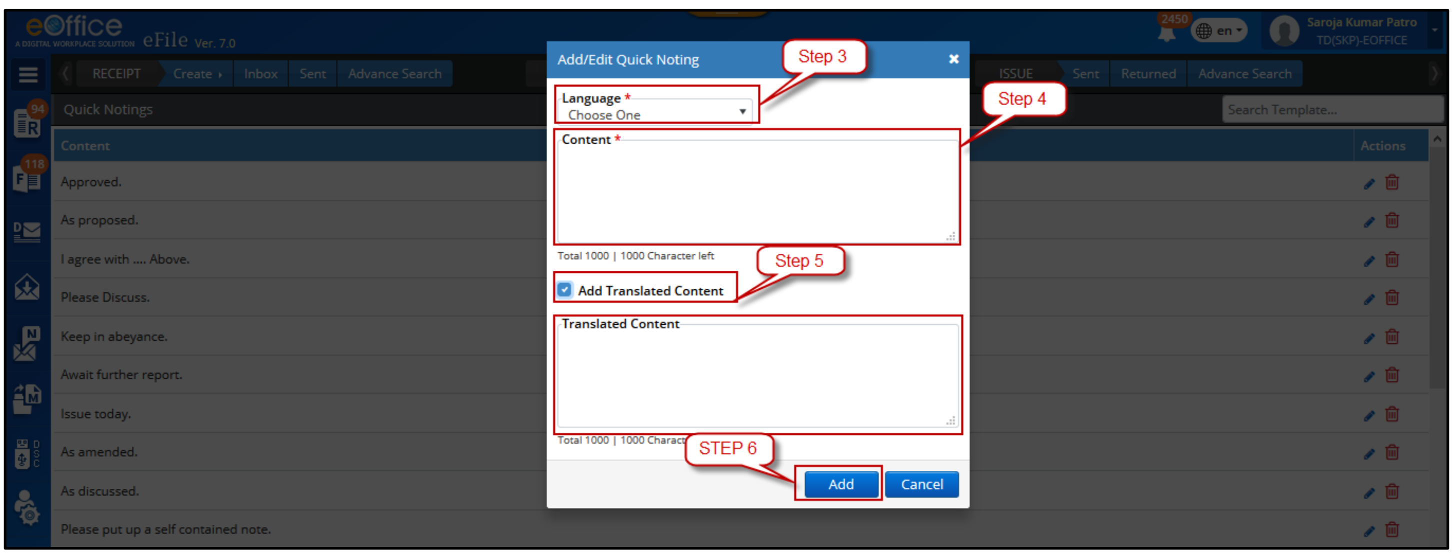


Figure 453

4. Enter the mandatory***'Content'** (quick note).
5. Check **'Add Translated Content'** checkbox (if required) and enter the Translated Content.
6. Click '**ADD'** to add user defined Quick Noting to the list.

Annexure-I

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.	**Correspondence:** 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.	**Noting:** 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

eOffice Project Divison

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e-Office FAQs

Table of Contents

1. Receipts

1.1 What is the process to Diarize (Register) a new inward correspondence?

In order to Diarize a new inward correspondence user has to scan the correspondence document in **'pdf '** format and save it in the local hard drive and then perform the following steps:

Step 1: Log on to the e-Office application and click on '**File Management System**' module.

Step 2: Click on the **Electronic** option of the **Browse and Diarize** under **Receipts** section in the left hand menu.

Step 3: click on the **Upload** button to upload the scanned correspondence document from your local hard drive.

Step 4: Enter the relevant details (Metadata) of the correspondence. (Mandatory fields are marked with red *)

Step 5: Click on **Generate Receipt** to generate a unique receipt number.

Note: When diarizing a Physical Receipt, uploading of document is not mandatory.

1.2 What are the recommended specifications for scanning documents in e-Office?

Only as PDF, in black and White, resolution - 100 DPI to 200 DPI, in Searchable pdf format.

1.3 Which fields are needed to be filled when we Diarize (Register) a receipt?

Those fields which are marked with asterisk (*) are the mandatory ones that are needed to be filled while generating a receipt

1.4 Why a PDF file is only allowed in 'Browse & Diarize' option?

The files in this format are in compressed form and editing is restricted which assures security.

1.5 Can user attach more than one PDF with a receipt?

No. more than one PDF with a receipt can't be attached.

1.6 Where is a receipt found just after diary number is generated?

The diarized receipt can be found in the created-box.

1.7 Can user delete a receipt?

No. the user cannot delete a receipt after creation.

1.8 How to track a receipt?

Step 1: Click on **Advanced search**.

Step 2: Click on **Receipt Tab**.

Step 3: Specify search parameter.

Step 4: Click on **Search Receipt**.

Step 5: Find the user detail is shown below **currently with** head.

1.9 Can user detach receipt from correspondence side of a file after movement?

No, a receipt can't be detached from correspondence side of a file after movement.

1.10 What is the difference between "GENERATE" and "GENERATE AND SEND"?

With the help of **GENERATE AND SEND** we can directly go to sending interface, whereas with the help of **GENERATE** the receipt gets stored in created box.

1.11 From how many locations a receipt can be sent?

A receipt can be sent from three locations-

1. Created (location of self diarised receipt)

2. Inbox (location of received receipt)

3. Sent (location of sent receipt, "a receipt can be sent as Carbon Copy from sent box")

1.12 What user needs to do, if unable to upload PDF in receipt diarisation screen?

Verify for following-

1. The PDF file should not have any special character in name.

2. Extension of the PDF file is **".pdf"** (extension must be in lower case)

Note: Size of the PDF is not more than the mentioned size.

1.13 Can user attach other documents with receipt?

No, other document can't be attached with the receipt, but information regarding the document can be given in enclosures.

1.14 What to do with physical letters after they are electronically diarized?

Physical letters will be diarized at the entry point and kept in record room/concerned section.

1.15 The enclosures like photos are to be diarized or sent physically along with the e-receipt?

The enclosures like photos have to be diarized along with the e-receipt as a single PDF.

1.16 How to send a reply to sender of receipt?

Steps are mentioned below:

Step 1: Select/Open the receipt.

Step 2: Click on **Send Back** tab.

Step 3: Click on **Send/ Sign and Send**.

1.17 How to filter physical and electronic receipt?

Physical and electronic receipts can be filtered from **View** tab.

1.18 Can user categorize inbox items?

Yes. Inbox items can be categorized by creating folders. Steps of customization are mentioned below:

Step 1: Go to **inbox**.

Step 2: Select the **receipt**.

Step 3: Hover over **"Move To"**.

Step 4: Click on **Create New Folder**.

Step 5: Mention folder name.

Step 6: Select **Receipt Inbox**.

Step 7: Click on **Save** button.

1.19 How to identify a receipt with DFA (Draft for Approval)?

A receipt with green icon in receipt inbox represents DFA.

1.20 How to view inbox of subordinate staff members?

Inbox of subordinates can be viewed from hierarchical view.

1.21 Why user is not able to perform any action on a receipt residing in the Inbox?

In case of a Physical receipt, it must be received first for any action to be performed. User has to select the receipt and click the Receive link to perform any action.

1.22 Can user edit metadata of receipt?

Yes. All the details of a receipt can be edited before movement. Details diary date, receipt number, and delivery mode of a receipt cannot be edited after movement. Steps to edit metadata of a receipt are mentioned below:

Step 1: Open main copy of receipt.

Step 2: Make required amendment.

Step 3: Click on **Save** Receipt.

1.23 Can user send receipt to more than one recipient?

Yes, receipts can be sent to multiple recipients. Use semicolon (;) to separate recipients.

1.24 Can user send main copy of the receipt to more than one recipient?

No, main copy of the receipt can be sent to only one recipient at a time.

1.25 If user is sending a receipt to multiple recipients in CC, will the receipt number be same for all?

No, the main receipt number will be sent to the Original recipient and to the other recipients in CC, copies will be sent.

For e.g.: If Original Receipt no. is x, then the recipient in (To) field will get the receipt no x and the recipients in (CC) filed will get the receipt no. as x(1), x(2), x(3) and so on.

1.26 What to do in case of duplicate receipt?

Duplicate receipts should either be attached together or closed.

1.27 What is copy option in Inbox

This option facilitates the user to copy the metadata of original receipt and will give a new unique dairy number after generating a receipt.

With the help of this option user can now send receipts to various other users having minor changes in metadata.

1.28 Can user put remarks on a receipt?

Yes. Remarks can be mentioned for a receipt on the sending interface.

1.29 Can user follow up reply sent over a receipt?

Yes, follow up can be taken for reply of a receipt.

Step 1: Click on **dispatch**.

Step 2: Compose the reply.

Step 3: Get it approved.

Step 4: Click on **Dispatch by self/Dispatch by CRU**.

Step 5: Click on **with Follow up**.

Step 6: Set the reminder and mention the remarks.

Note: Notifications can be viewed in the Notifications --> Dispatch follow up.

1.30 Can user edit DFA or Reply of a receipt?

Yes, DFA can be edited before approval.

1.31 Can user sign a DFA or Reply of a receipt?

Yes. DFA can be signed digitally with the help of DSC.

1.32 Can user place copy of dispatch to relevant file?

Yes. Concern receipt need to be put inside the file and dispatch will automatically gets attached.

1.33 Can user modify approved DFA/ Reply?

No. Modification is allowed till the approval of DFA.

1.34 How to send reply/dispatch against a receipt to more than one recipient?

Yes. Dispatch can be sent to more than one recipient through carbon copy option

Step 1: Click on **dispatch**.

Step 2: Compose the reply.

Step 3: Click on **Add More Recipient(s)** button.

Step 4: Get it approved.

Step 5: Click on **Dispatch by Self/Dispatch by CRU**.

1.35 Can user close multiple receipts at a time?

Yes. Multiple receipts can be closed at a time.

Step 1: Expand Receipt.

Step 2: Select the desired receipts.

Step 3: Click on **Close**.

Step 4: Mention remarks and click on **OK**.

1.36 How to see movement of a receipt

Movements can be viewed by opening a receipt and through movement tab also

Step 1: Open the receipt

Step 2: Click on **Movements**

1.37 Is it possible for multiple users to work simultaneously on a single e-receipt?

Yes, it is possible for multiple users to work simultaneously on a single e-receipt. The following are the steps:

Step 1: Select the receipt.

Step 2: Send receipt to multiple users using **CC** option.

Step 3: Individual user can work on the same receipt in their INBOX.

1.38 What is the significance of date range?

Date range is the facility to view inbox items for desired time interval.

1.39 How to change date range?

Steps to manage date range are mentioned below.

Step 1: Click on **date range**.

Step 2: Select **from date** and **to date**.

Step 3: Click **Ok**.

1.40 Can user convert physical receipt to electronic receipt?

No, a physical receipt can't be converted into electronic receipt. You can upload the document with the physical receipt but nature of the receipt will remain physical. Steps are mentioned below:

Step 1: Open the receipt.

Step 2: Upload the pdf file.

Step 3: Click on **Save** button.

1.41 What is the difference between put in a file and attach receipt?

You can insert a receipt into the file with the help of **"Put in a file"**, whereas you can tag receipts together with the help of **"attach receipt"**.

1.42 What is the significance of due date?

Due date is used to define a deadline for the recipient for the receipt.

1.43 How to locate and pull up a receipt?

A receipt can be located and pulled up in two ways:

1) From hierarchical view

a) Go to hierarchical view

b) Go to inbox of other user of same organization unit.

c) Locate the receipt

d) Mark check for the located receipt

e) Click on pull up

f) Mention remarks for pull up

g) Click on **ok**

2) From advance search

a) Search the receipt from advance search option.

b) Mark check for the searched receipt.

c) Click on pull up.

d) Mention remarks for pull up.

1.44 What is eMail diarisation?

eMail diarisation facilitates the eOffice user to fetch the letters or mails directly from the user's NIC mail id to the eFile application.

1.45 How to do email diarisation?

Steps for eMail diarisation are mentioned below:

Step 1: Open **NIC mail** from home page of eOffice.

Step 2: Select the email click on **Move to eFile**.

Step 3: Go to home.

Step 4: Click on **File Management System**.

Step 5: Click on **Receipt**.

Step 6: Click on **email diarisation**.

Step 7: Click on **document/link**.

Step 8: If attachment is available move attachment to the right side panel.

Step 9: Click on **Diary/Preview**.

Step 10: Fill metadata.

Step 11: Click on **Generate/ Generate and Send**.

1.46 What is difference between details and movement?

In details of a receipt dispatch history, attached files, attached receipts, detached file, and detached receipt can be found.

In movement, movement as well receipt information can be seen.

1.47 Can user send receipt to other instances through eOffice?

No, receipt can't be send to the other department through eOffice.

1.48 Which receipts can be found in the Created Section?

All the receipts which have been created but not sent to anyone can be found in the Created section.

1.49 How to distinguish between main and cc of a receipt?

The format of main copy is 2345/2015-Admin. The format of CC is 2345(1)/2015-Admin. (1) Indicates first copy of the receipt.

1.50 How to pullback a receipt?

Pullback facilitates a user to withdraw a sent receipt from sent items until the recipient has not viewed/ received the receipt. Steps to pullback are mentioned below:

Step 1: Go to **Sent**.

Step 2: Click on right most icon.

Step 3: Mention **remarks**.

Step 4: Click on **Ok**.

1.51 Is it possible to send a receipt to different groups?

Yes, it is possible to send a receipt to different groups. The following are the steps:

Step 1: Select the receipt.

Step 2: Click on **Send** button

Step 3: Click on **TO** and select the **group**.

Step 4: Select the **second group**.

Step 5: Click on **Send** button.

1.52 How to close the receipt?

Steps to close a receipt are mentioned below:

Step 1: Select/ Open the receipt.

Step 2: Click on **Close**.

Step 3: Mention **remarks**.

Step 4: Click on **Ok**.

1.53 How to reopen a closed receipt?

Steps to reopen a receipt are mentioned below:

Step 1: Expand Receipts.

Step 2: Click on **Closed-->By Me**.

Step 3: Select the **receipt**.

Step 4: Click on **reopen**.

Step 5: Mention **Remarks**.

Step 6: Click on **Ok**.

1.54 Can user view close history?

Yes, it can be viewed from **Close** tab.

1.55 How to generate and customize acknowledgement?

Acknowledgement of a receipt can be generated from **Sent** and **Created** boxes.

Steps to generate acknowledgement for a receipt are mentioned below:

Step 1: Select the receipt, Click on **Generate Acknowledgment** tab
Step 2: Modify the default acknowledgement message if required and save.
Step 3: Click on **Send Later** and send it in future from **Created** menu of **Acknowledgment**
Step 4: Click on **Continue** to send the acknowledgement at same time.

2. Files

2.1 How can user differentiate between Physical and Electronic files in inbox?

The Physical files will be indicated by **P** and the Electronic files will be indicated by **E**.

2.2 How can user differentiate between read and unread files in inbox?

Unread files appear in bold font whereas read files appear in unbold font.

2.3 How can user view only the unread/ read/ physical/ electronic files in inbox?

User can use View option to customise the view of inbox.

Step 1: Go to View option.

Step 2: Select desired View Option.

2.4 Can user sort the files in inbox?

Yes. Files can be sorted on the parameters shown in inbox.

2.5 What is the difference between the red icon and blue icon under 'Remarks' parameter?

Red icon indicates that the file was sent without any Remarks whereas Blue icon indicates that the file has been sent with some Remarks.

2.6 Can user rename a folder created under inbox?

Yes. Steps to rename the folder are mentioned below:

Step 1: Go to Move To.

Step 2: Select Manage Folders option.

Step 3: Click on Edit icon

Step 4: Edit the folder name.

Step 5: Click on Save Button.

2.7 Can user move files to a folder created under inbox?

Yes. Steps to move a file to a folder are mentioned below:

Step 1: Select the Files.

Step 2: Go to Move To.

Step 3: Select desired Folder Name.

2.8 What is the computer number for a file?

It is a unique sequential number generated for each file while creation of the file.

2.9 How can user identify a file having a draft without opening it?

Files having a draft will be indicated by a green icon at the end of the file number.

2.10 Why don't users have a delete option in Inbox?

Files in Inbox cannot be deleted as they are in movement and under process. So to maintain the traceability, user cannot delete the file/receipt from inbox.

2.11 Can user create a new folder under inbox?

Yes. Under the Inbox section, there is a Move to folder option.

Use this option to create new folders and manage the files in the respective folders.

2.12 Without opening a File, is it possible to know if there is any yellow note or Draft prepared in a particular file?

Yes.

If there is a Draft already prepared in a file then it would be denoted by a small green draft icon in front of the file no.

If there is a Yellow Note already prepared in a file then it would be denoted by a yellow colour background of the file no

2.13 Why user is not able to perform any action on a file residing in the Inbox?

In case of a Physical file, it must be received first for any action to be performed. User has to select the file and click the Receive link to perform any action.

2.14 Can user perform any action without receiving a file?

No action can be performed on Physical file without receiving it, but in case of electronic files, user can perform any action on it without even receiving.

2.15 Is it possible to create folders other than in Inbox?

No, it is not possible to create folders other than in Inbox.

2.16 What is the difference between Send Back and send?

While using Send Back option, the To field will be automatically filled with the user information from whom the file has been received whereas using Send option, the To field will be blank and we have to search the desired user.

2.17 How to put up a correspondence inside a file?

Step 1: Open the file.

Step 2: Click on Correspondence option.

Step 3: Click Attach button on the correspondence side.

Step 4: Select the required Receipt from the list of Receipts.

Step 5: Click on Attach button on the Receipt list window.

2.18 What is Yellow Note?

It is a draft note which can be edited after movement of file. (Yellow Note cannot be digitally signed.)

2.19 Will adding a green note add a new noting sheet?

No. The note typed after using add green note option will appear just after the signature stamp of the last comments on the noting sheet.

2.20 Can I attach references/ supporting documents other than receipt with the file?

Yes, steps are mentioned below:

Step 1: Open the file.

Step 2: Click on References option.

Step 3: Select Local reference.

Step 4: Click on Upload button on the right side.

Step 5: Select the file to be uploaded from your local computer.

OR The user can attach pdf documents directly under the green note by clicking the Attach Button provide just below the word editor

2.21 Can user delete a local reference?

Yes, steps are mentioned below: (Local Reference cannot be deleted after the file has been moved)

Step 1: Open the file.

Step 2: Click on References option.

Step 3: Choose the delete option from the Choose One drop down box on the right side your local computer.

Step 4: Click on OK button.

2.22 Which format is allowed in Local References?

Only (PDF, DOC, DOCX, XLS, XLSX, ODT, OPENDOC, OCTET, PPT, PPTX, PPSX) formats are allowed.

2.23 Can user refer a page in Correspondence/Noting with my current noting?

Yes. User can refer to a page on Correspondence/Noting using the Reference icon.

2.24 Can user refer to a particular paragraph in Noting with my current noting?

No. The user can't refer to a particular paragraph in the Noting. User can refer a particular page in the previous noting

Step 1: Open the file.

Step 2: Click on Previous Noting Button.

Step 3: By scrolling the previous note get the page to be referred

Step 4: Highlight the text to be referred in current Noting.

Step 5: Click on reference icon.

2.25 Can user view the previous noting in the file while typing current note?

Yes. User can use to the Previous Noting button to view the previous noting done in the file while typing our current note. We can also use the Quick View option to view the same in an independent window.

2.26 Can user see the further movements of the file after sending the file?

Yes.

Step 1: Go to Sent.

Step 2: Open the file.

Step 3: Click on Movements option.

2.27 Can user see the further noting done on the file after sending the file?

No. We can only see the further noting done when the file is received again.

2.28 Can user attach multiple correspondences at a time?

No. We have to select a single correspondence at a time in the desired sequence.

2.29 How can user convert a Yellow Note into a Green Note?

Step 1: Open the file with Yellow Note.

Step 2: Click on Save button.

Step 3: Click on Confirm button.

2.30 Is it necessary to save note?

No. The noting will get auto-saved in regular intervals. The auto save interval can be managed at user level.

2.31 Can user edit green note after the file has been returned?

No. The Green Note cannot be changed after the file has been moved.

2.32 How to change the auto save interval of noting?

Step 1: Go to Setting.

Step 2: Select Preferences.

Step 3: Change Auto Save Duration (In Sec).

Step 4: Click on Save button.

2.33 Can user detach a correspondence from a file?

Yes. User can detach a correspondence from a file until the file is moved to the next level.

Note: Correspondence cannot be detached once the file moved.

2.34 How can user know that the note is digitally signed?

A digitally signed note will have a green tick mark on the Name Stamp of the user sending the note.

2.35 Can user attach any supporting document with green note?

Yes. Any supporting document in PDF format can be attached with green note using the Attach button.

2.36 Can user create more than one draft in a file?

Yes

2.37 Can user delete a draft after approval in a file?

No.

2.38 What is Draft Version in a file?

It is the different versions of draft created every time a user edits the draft.

2.39 Can user convert a green note into yellow note?

No. Only a Yellow note can be converted into a Green Note.

2.40 Can user send a file without any correspondence?

Yes

2.41 Can user copy and paste the content in noting/draft from a word file?

Yes

2.42 What is Referred in Files?

Referred in Files provide the details of files in which the currently opened file has been referred.

2.43 Can user upload a word file in draft?

Yes

2.44 Can user edit an uploaded word file in the draft online?

No.

2.45 How can user check the status of a draft in a file?

Step 1: Open the file with Draft.

Step 2: Click on Draft option.

Step 3: Click on View Draft option.

Step 4: Check the status of the Draft against the Draft Number.

2.46 Where can user see the creation date of a file?

Creation date of a file can be seen in the Details option.

Step 1: Open the file.

Step 2: Click on Details option.

2.47 How different versions of DFA are maintained in e-file?

At initial level DFA is created with a draft number and version 1.0. At further levels, when changes are made in the same draft, then the versions will be maintained as 1.1,1.2 and so on.

2.48 What is the Date Range?

It is the interval of Creation Date of files between which the files will be displayed to the user.

2.49 What is the significance of Due Date for a file?

It is the date defined for time bound matters in which the course of action needs to be preferably taken within the due date.

2.50 Can user attach a physical receipt in electronic file?

Yes. A physical receipt can be attached in an electronic file if the Upload Section of the physical receipt has been fulfilled.

2.51 Is it possible to revert on a 'Yellow Note'?

Yes, it is possible to revert on a 'Yellow Note'.

Step 1: Click on the file.

Step 2: Yellow noting is open with 3 options i.e. EDIT, DISCARD and CONFIRM.

Step 3: Click on EDIT for updating the existing yellow note.

Step 4: Click on SAVE.

2.52 Is the history of a 'Yellow Note' maintained?

Yes, history of 'Yellow Note' is maintained.

Note: History of Yellow note is discarded once it has been converted into Green note.

2.53 Is it possible to add 'Green Note' as well as 'Yellow Note' simultaneously?

No, it is not possible to add 'Green Note' and 'Yellow Note' at the same time in the same account.

2.54 Can user delete a folder created under inbox?

Yes. Steps to delete a folder are as follow:

Step 1: Go to **Move To**.

Step 2: Select **Manage Folders** option.

Step 3: Click on **Delete** icon

Step 4: Click on **OK** button.

2.55 Which files can be found in the Created section?

All the files which have been created but not sent to anyone can be found in the Created section.

2.56 How to park a file?

Steps to park a file are as follow:

Step 1: Select the file(s) to be parked from the location (File Inbox)

Step 2: Go to **More** option.

Step 3: Click the **Park**.

Step 4: Fill the mandatory **Parking Due Date** and **Parking Remarks**.

Step 5: Click on **OK** button.

2.57 How to Unpark a file?

Steps to unpark a file are as follow:

Step 1: Select the file(s) to be unparked from the location (File Parked).

Step 2: Click on **Unpark**.

Step 3: Fill the mandatory remarks.

Step 4: Click on **OK** button.

2.58 Is the Parking Due Date mandatory while parking a file?

Yes

2.59 Will the file get automatically unparked on the Parking Due Date?

No.

2.60 Can user get a SMS or email on the Parking Due Date of a file?

No. But the user gets a Notification in his account in File Management System.

2.61 Can user unpark a file before the reminder date?

Yes. Files can be unparked at any point of time whenever required.

2.62 Can user retrieve parked files at later point of time?

Yes. Files can be unparked at any point of time whenever required.

2.63 Why are files parked?

Sometimes there is a scenario when work has been done on the file which is residing in File inbox and now the file would be required after certain period of time, then user has a provision to park that file to remove his working pendency.

2.64 How the Files are parked from the File Inbox

Step 1: Select the File which needs to be parked.

Step 2: Click the **Park File** option under **More Action** link.

Step 3: Enter the Remarks and Reminder date to park the file and click the **OK** button.

2.65 How to check history of Parked Files?

Step 1: Select the File whose park history needs to be checked.

Step 2: Click the **Park File History** option under **More Action** link.

2.66 What is difference between Close and Park?

Close can be used if the desired action on the file has been completed where as Park can be used if the desired action is sustained on temporary basis for a certain interval of time.

2.67 Is it possible to 'Pull up' the parked files from some other account?

Yes, it is possible to pull up the parked files. (The pulled up file will appear in user's file inbox.)

Step 1: Go to **Advanced Search**.

Step 2: Search the file.

Step 3: Click on **Pull up** button.

Step 4: Enter the Remark and click on **OK** button.

2.68 Can user reopen closed files at later point of time?

Yes. Files can be re-opened at any point of time whenever required.

2.69 Can a file be reopened once it is closed/ parked?

Yes, steps are mentioned below:

Step 1: Select the file under Closed/Parked tab of Files section.

Step 2: Click the **Make Active** option under **Mark As** link.

Step 3: Enter the Remarks and click the **OK** button.

2.70 How to Close a File?

Step 1: Open the File.

Step 2: Go to **Close** option.

Step 3: Select **Send For Approval**.

Step 4: Fill the **Mandatory remarks**.

Step 5: Click on **Send** button.

The Status of File in Submitted Files for Closing Approval is changed to Approved.

Step 6: Click on **Close** option.

Step 7: Fill the **Mandatory Remarks**.

Step 8: Click on **Ok** button.

2.71 What is closing history?

It is the history of closing information every time the file has been closed.

2.72 If a particular file has been wrongly sent to a person, what should be the next step?

If the person, to whom the file has been sent, has not opened the same yet then it can be pulled back using the Pullback link from the Sent sub-section under the Files section.

It will move to the sender's Inbox.

2.73 Can user mark a file to multiple users at a time?

No. File can be marked to only a single user at a time.

2.74 Is it possible to refer the files from the 'Sent'?

No, it is not possible to refer the files from the Sent.

2.75 What can user do if a file is wrongly marked?

We can Pull Back a file if the file is wrongly marked.

Step 1: Go to **Sent**.

Step 2: Click on the **Pull Back** icon against the desired file.

Step 3: Fill the **mandatory Remarks**.

Step 4: Click on **Ok** button.

Note: The file pulled back will be retrieved in the Inbox of the user.

2.76 Can user attach one file with other file?

Yes. We can attach one file with other if they are same in nature (Physical/Electronic).

Step 1: Open the file.

Step 2: Click on **File** link under **Attachment** button.

Step 3: Click on **Attach File** button.

Step 4: Select the file and click on Attach button.

Step 5: Enter the remark and click **OK** button.

2.77 Can user merge two electronic files?

No.

2.78 What is the difference between interim and final reply?

Interim- An interim reply will be sent within a month (from the date of receipt) indicating the possible date by which a final reply can be given.

Final reply- Completion of all action, where necessary, in the issue of final orders to the party from which the original communication was issued.

2.79 Can user convert a physical file into electronic file?

Yes. A physical file can be converted into electronic file using the Conversions option.

Note: An Electronic file cannot be converted into Physical file.

2.80 What is the difference between SFS and Non-SFS Files?

Non-SFS: File number can be created under standardized head only.

SFS: Files number can be created free flow.

2.81 If user has created file and didn't send to anyone, from where user can get that file?

If user has generated the File number, then file can be found under Completed Sub-section of Created Section under Files module.

2.82 How to create a new file (Physical/Electronic)?

Step 1: Click on **Create New (SFS/Non-SFS)**.

Step 2: For SFS- Enter the File Number.

For Non SFS- Choose the File Heads from the drop down.

Step 3: Enter the **Description** of the File and Click on **Continue Working** button.

2.83 Can user delete a file?

No. A file cannot be deleted if the number has been generated.

2.84 Can user edit the file number?

No. File number once generated cannot be changed.

2.85 Can user edit the description of a file?

Yes.

Step 1: Open the file.

Step 2: Click on **Edit** button.

Step 3: Enter the required data.

Step 4: Click on **Done**.

2.86 How to create a part file?

Step 1: Click on **Create Part**.

Step 2: Browse for the File whose Part needs to be created.

Step 3: Fill the metadata.

Step 4: Click on **Create Part** button.

OR

Step 1: Go to Sent.

Step 2: Select the file and click on **Create Part** button.

Step 3: Fill the metadata.

Step 4: Click on **Create Part** button.

2.87 Why Volume files are created?

Volumes are created in case of physical files only. These are created in order to make sure that that size of the physical files remains small and handy.

3. Migration

3.1 How can user migrate a physical file into a electronic file?

A physical file can be migrated into an electronic file by using the Migrate File option in File Management System.

3.2 What is the required folder structure for uploading files in FTP?

A folder named by the physical file number where the '/' must be replaced by '_'. Four sub folders named Noting, Receipt, Issues and References containing the concerned pdf files needs to be created inside the main folder

3.3 What is Opening Date?

The creation date of the physical file is the Opening Date

3.4 What is the significance of Drafts in migrate file segment?

During the migration process if Work on file later button is used then the file goes to the Drafts option under Migrate File.

3.5 What is the significance of Completed in migrate file segment?

During the migration process if Continue Working button is used then the file goes to Completed option under Migrate File.

3.6 What is the reason for a file showing number not generated in Completed option under Migrate File?

A file will show number not generated in Completed option under Migrate File until the migration process is finalized

3.7 Where are the files shown after migration is completed?

After the migration is completed the file can be seen in the Completed under Created option in the File menu.

3.8 Where is the migrated noting shown in an electronic file?

The migrated noting is shown as a link at the beginning of the note sheet.

3.9 What is the reason for the unavailability of a file in the list of physical files while clicking on Browse button?

The files which have been already migrated are not shown in the list of physical files. If the file exists in Drafts or Completed option under Migrate File then also the file is not listed in the physical files.

3.10 How can user manage the order of the correspondences while migration?

The up and down arrow icon shown on the correspondence side before finalizing the migration will manage the sequence of correspondence.

3.11 Can user edit the opening date of a migrated file?

No. The opening date of a migrated file cannot be edited.

3.12 Can user see all the files uploaded in the FTP while migration?

No. Only the files inside the folders for which a user has been assigned permissions will be shown.

3.13 How can user assign the permission to other user to migrate files from a folder created in FTP?

A user can be assigned permission to migrate files from a folder created in FTP by the Folder Permission option under Migrate File.

3.14 What is the difference between migration and conversion?

Conversion is used to convert a physical file already created in the application into an electronic file where as migration is used to create an electronic file directly from a physical record through FTP portal.

3.15 What are the mandatory fields while migrating a file?

File Number, Physical File Number, Description, Category (Main) and Opening Date are the mandatory fields while migrating a file.

4. Dispatch

4.1 How to set reminder on dispatch after sending the Issue?

Steps to set Reminder on dispatch:

Step 1: Expand Dispatch.

Step 2: Select the Issue and click on Create Reminder.

Step 3: Select Due Date and mention Remarks.

Step 4: Click on Ok button.

4.2 How to send reply to multiple recipients at a time from file?

Reply/ Dispatch can be sent to multiple recipients through email/post after approval. Steps to dispatch to multiple recipients at a time:

Step 1: Open file and click on Draft then on Create New Draft.

Step 2: Compose DFA, fill Draft Details and Communication Details.

Step 3: Click on Add More Recipient button and mention other recipient's communication details.

Step 4: Get the DFA Approved and Signed.

Step 5: Click on Dispatch by Self/ Dispatch by CRU.

Step 6: Click on Send With followup/ Send Without followup.

4.3 Can user dispatch by email in eOffice?

Yes, it is possible to dispatch through email. Dispatch can be sent to multiple recipients by using Carbon Copy (cc) option.

Email id of recipients can be mentioned in email details section at the time of dispatch. More than one recipient may be mentioned as Carbon Copy (cc).

4.4 How can user send standalone reply without creating a file?

Standalone reply can be sent without creating a file. Steps to send standalone reply:

Step 1: Open the receipt.

Step 2: Click on Dispatch.

Step 3: Compose the DFA (No DFA is required in case of physical receipt).

Step 4: Verify recipient's Communication Details.

Step 5: Click on Save.

Step 6: Get the DFA Approved and Signed.

Step 7: Click on Dispatch by self/ Dispatch by CRU.

Step 8: Click on Send with Follow-up/ Send Without Follow-up.

4.5 Is there a way to withdraw/cancel after final dispatch?

No, final dispatch cannot be withdrawn after dispatch.

4.6 Can user attach any other reference document at the time of dispatch?

Yes other documents can be attached at the time of dispatch through Attach File button.

4.7 Which file format is allowed to attach a reference document with dispatch?

Documents of following formats can be attached:

PDF, DOC, DOCX, ODT, OPENDOC, OCTET, XLS, XLSX, PPT, PPTX, and PPSX

4.8 Can user modify communication details?

Yes

4.9 Difference between "Send with follow-up" and "Send without follow up"?

In "Send with follow-up" reminder can be set for self or for section, whereas in "Send Without follow-up" no reminder can be set.

4.10 After dispatch, where does the document lie with the user?

After dispatch the issue can be found in correspondence of the file.

4.11 While dispatching, whose details have to be filled in communication details?

Communication details of the recipient should be filled in Communication Details.

4.12 What is the difference between "Issued and Sent" and "Issued and Dispatched"?

In case, the letter is sent from any e-Office user but has not been finally dispatched, its status remains as "Issued and Sent".

In case the letter is finally dispatched to the intended person, its status changes to "Issued and Dispatched".

4.13 How to check status of a Dispatch?

Steps to check status of a Dispatch:

Step 1: Expand Dispatch.

Step 2: Click on Sent button.

Step 3: Check the status of an Issue below Status head.

4.14 How can user set Reminders after dispatching?

Steps to set reminder after dispatching:

Step 1: Expand Dispatch.

Step 2: Click on Sent button.

Step 3: Select Issue.

Step 4: Click on Create Reminder.

Step 5: Compose Reminder and verify Communication Details.

Step 6: Click on Save reminder, get it Approved and Signed.

Step 7: Click on Dispatch by Self/ Dispatch by CRU.

Step 8: Click on Send with Follow-up/ Send without Follow-up.

4.15 Where to find dispatch register?

Steps to find dispatch register:

Step 1: Click on Reports.

Step 2: Under dispatch category click on Dispatch Register.

OR

The user can get his/her dispatch register from the **Sent** option of the first **Dispatch** menu.

4.16 Can user dispatch over a receipt through e-Office?

Yes, dispatch can be done through selecting the email option in e-Office.

4.17 Can user print signed dispatch?

Yes, signed dispatch can be printed.

4.18 Can user dispatch through postal or courier services?

Yes, Print out of signed dispatch can be mailed through postal or courier services.

4.19 How to view dispatch history sent over a receipts?

Yes, history can be viewed.

Step 1: Expand Dispatch Menu.

Step 2: Click on Sent button.

4.20 How to generate report for dispatch?

Yes, reports can be generated.

Step 1: Click on e-File MIS Reports.

Step 2: Click on Dispatch section wise/ Number wise/Receipt number wise.

4.21 Can user place copy of dispatch to relevant file?

Yes, concern receipt need to be put inside the file and dispatch will automatically get attached.

5. DSC (Digital Signature Certificate)

5.1 What is a Digital Signature Certificate?

Digital Signature Certificates (DSC) is the replacement of analog or physical certificates in electronic format.

Examples of physical certificates are aadhar card, driving licenses, passports etc. which serve as proof of identity of an individual for which that is meant for. For example: A driver's license identifies the person to drive a motor vehicle.

In the similar lines, a digital certificate can be presented electronically as the passport to access information or services on the Internet or to sign documents digitally.

5.2 Why is a Digital Signature Certificate (DSC) required?

Like a physical signature is required for certain documents, DSC can be used to sign electronically in a green sheet/draft in e-File applications.

5.3 Who is the issuing authority for the Digital Signature Certificate (DSC)?

A licensed Certifying Authority (CA) is the authority for issuing a DSC.

5.4 What are the different types of Digital Signature Certificates valid for e-Office?

Following are the two types of DSCs recommended for e-Office:

Class 2: Here, the identity of a person is verified against a trusted, pre-verified database.

Class 3: This is the highest level where the person needs to present himself or herself in front of a Registration Authority (RA) and prove his/ her identity.

5.5 Is the Digital Signature Certificate (DSC) useful other than e-Office?

It can be used in other applicable applications too, like filing your return etc.

5.6 What is the cost of a DSC?

Cost of DSC depends on the DSC issuing authority. Kindly refer the cost chart of the DSC issuing authority for this..

5.7 How much time does the DSC issuing authority (CA) take to issue a DSC?

The time taken by CAs to issue a DSC may vary from three to seven days.

5.8 What is the validity period of a Digital Signature Certificate?

The Certifying Authorities are authorized to issue a Digital Signature Certificate with a validity of one or two years from date of issuance.

However DSC may get expire due to various reasons. For example: Expiration of DSC also linked with date of Super Annuation.

5.9 What is the legal status of a Digital Signature?

Digital Signatures are legally admissible in a Court of Law, as provided under the provisions of IT Act.

5.10 Is a digital signature legally valid?

Yes. The information Technology Act, 2000 in India has given legal validity to digital signatures.

5.11 Can a document signed with a digital signature be considered as valid evidence?

Yes. The Indian Evidence Act, 1958 has been modified and amended on lines with the Information Technology Act, 2000.

Therefore, any electronic document signed with a valid digital signature is considered a valid piece of evidence similar to a physical document signed with a hand-written signature.

5.12 What happens to a DSC after validity period?

DSC expires after the validity period. To renew it contact the issuing authority for further instructions.

5.13 What safety precautions should one take while using a Digital Signature?

DSC is password protected. Please change your initial password without fail.

You should keep the media carrying your digital signature safely and never disclose your password to anybody.

5.14 How does Digital Signature Certificate (DSC) functions?

DSC use the Public Key Infrastructure (PKI) Technology, which is a sophisticated, mathematically proven method of encrypting and decrypting information.

For Example: Something similar to accessing a locker in a bank.

5.15 Where can user get additional information on Digital Signature Certificate (DSC)?

The concerned issuing authority can be contacted for further information or queries.

5.16 How to register the DSC with the e-File application?

Steps are mentioned below:

Step 1: Go to DSC Registration under DSC Tab in the left hand menu of e-File.

Step 2: Click the Signing Certificate link present on the top right corner.

Step 3: Select the certificate that appears in the window.

Step 4: Click OK button to register the certificate with the application.

5.17 Does "Sign & Send" mean user is signing the files with his/her actual signature?

No. "Sign and Send" means user is signing the file using his/her digital signatures.

5.18 Does user have to plug in the DSC for e-File login?

No. It's not mandatory.

5.19 What happens if user DSC is lost?

If DSC is lost, then user needs to fill up the forms regarding the same with the fine to get a new DSC.

5.20 DSC was working but suddenly it is not getting recognized by the system. What is the problem?

Plug in the DSC into any other USB port and see if this works.

5.21 How to activate java in DSC registration page when "java" has been updated and not functioning?

Steps are as follows:

Step1: Open Java.com/verify in browser to check successful java installation.

Step2: Click on Allow or Allow and remember to enable Java plug-in.

5.22 How to enable java in browser when "java" has been updated still not functioning?

Steps are as follows:

Step1: Open Java.com/verify in browser to check successful java installation.

Step1: (a) If it asks to enable then click on Allow or Allow and remember to enable Java plug-in.

Step1: (b) If it doesn't ask to enable Java then please install Java 32bit version after uninstalling the previous Java version (64bit).

5.23 How to work with DSC when application has been blocked by Security settings?

Steps are as follows:

Step1: Open Java options from Java Control Panel.

Step2: Under Security Tab, click on Edit Site list>> Add URL of application like https://esarkar.kerala.gov.in , https://eofficehealth.kerala.gov.in

Step3: Click on Restore Security Prompts>>Click Restore All button.

Step4: Restart the Browser and sign with DSC.

Step5: Allow Security prompts raised if any.

5.24 When clicked on Sign & Send page show progress but nothing happens/ Screen goes in Hang state?

Steps are as follows:

Step1: Go to DSC Registration screen.

Step2: Verify there if same certificate has been registered as displayed in DSC token.

Step3: If issue persists, please de-register and Re-register the digital certificate in application.

5.25 Does the DSC get verified at the server end?

No.

5.26 Is DSC individual specific or post specific?

DSC is individual specific.

5.27 Does DSC change if the user is transferred?

Yes.

5.28 If the pin for DSC is lost, then how to work in e-file?

You have to reset the PIN of that DSC from the software installed for the DSC.

5.29 Is it required to enter Pin every time a file is sent?

Yes, it is required to enter pin every time a file is to be sent.

5.30 Is it possible for a user to have multiple DSCs?

No.

6. MIS Reports

6.1 From where user can access e-File MIS Reports module?

eFile MIS Reports module is available in e-Office portal Homepage under the File & Document Services.

6.2 Is MIS Report is role based?

Yes.

6.3 Can user customize report sub module role wise?

Yes. The availability of reports is role based. Only administrator can customize it.

6.4 Which are the main categories for Report?

There are five main categories for MIS Reports: Files, Receipts, Dispatch, VIP and Miscellaneous.

6.5 Can I generate reports for both the nature of file/receipt at a same time?

Yes. Reports can be generated for both the nature of file by choosing "Both" option in nature of file.

6.6 From where user can track number of file created and receipt diarized by a section or individual?

Files creation and Receipt Diary report can be generated from File register and diary register respectively. Steps are mentioned below:

Step 1: Go to File or Receipt.

Step 2: Move the cursor to File Register or Diary Register.

Step 3: Select report type Detailed/Month wise/Summary.

Step 4: Select Date Range.

Step 5: Select dropdown for individual or section.

Step 6: Click on View Report.

6.7 Can user generate reports for file/receipt received by me?

Yes. Steps are mentioned below:

Step 1: Go to File or Receipt.

Step 2: Move the cursor to File Received or Receipt Received.

Step 3: select report type Detailed/Month wise/Summary.

Step 4: Select Date Range.

Step 5: Select dropdown for Office/Section.

Step 6: Click on View Report.

6.8 Can user generate pendency report for files of other Section/Office pending with his/ her Section/Office?

Yes. Steps are mentioned below:

Step 1: Go to File.

Step 2: Move the cursor to File Pendency.

Step 3: Select report type Pending Files OF.

Step 4: Select dropdown for Office/Section.

Step 5: Click on View Report.

Step 6: Click on total pendency to view individual Report.

6.9 Can user generate pendency report of his/ her files (created in my section/office) pending with other??

Yes. Steps are mentioned below:

Step 1: Go to File.

Step 2: Move the cursor to File Pendency.

Step 3: Select report type Pending Files.

Step 4: Select dropdown for Office/Section

Step 5: Click on View Report.

Step 6: Click on total pendency to view individual.

6.10 How to generate report of the files parked by me or section?

Steps are mentioned below:

Step 1: Go to File.

Step 2: Move the cursor to File Parked.

Step 3: select report type Detailed/Summary.

Step 4: Select dropdown for Office/Section.

Step 5: For individual select user name.

Step 6: Click on View Report.

6.11 Is there any option to generate reports for activities performed by employees who are currently inactive w.r.t file, receipt, etc.?

Yes. Reports are available for older activities performed by inactive employee w.r.t file, receipt, etc. Steps are mentioned below:

Step 1: Go to File/Receipt/VIP/Dispatch/Misc.

Step 2: Move the cursor to respective sub-module.

Step 3: select report type.

Step 4: Select dropdown for Office/Section from user belongs.

Step 5: Select inactive user name (* indicate inactive employee).

Step 6: Click on View Report.

6.12 Can user keep record for file converted from physical to electronic?

Yes. Steps are mentioned below:

Step 1: Go to File.

Step 2: Move the cursor to File Conversion.

Step 3: select report type Summary.

Step 4: Select Date Range.

Step 5: Select dropdown for Office/Section.

Step 6: Click on View Report

6.13 From where can user generate receipt pendency report?

Receipt pendency report can be generated by the following mentioned steps:

Step 1: Go to Receipt.

Step 2: Move the cursor to Receipt Pendency.

Step 3: select report type Pending Receipt of.

Step 4: Select dropdown for Office/Section.

Step 5: Click on View Report.

Step 6: Click on total pendency to view individual Report.

6.14 From where can user generate File Forwarded/Receipt forwarded report for individual?

File Forwarded/Receipt forwarded report can be generated by the following mentioned steps-

Step 1: Go to File/Receipt.

Step 2: Move the cursor to File Forwarded/Receipt Forwarded.

Step 3: select report type Detailed.

Step 4: Select Date Range.

Step 5: Select dropdown for Office/Section.

Step 6: Select User name for individual employee from the Office/Section.

Step 7: Click on View Report.

6.15 How to generate report for dispatch register?

Following are steps for generating dispatch register report

Step 1: Go to Dispatch.

Step 2: Move the cursor to Dispatch Register.

Step 3: select report type Detailed/Month wise/Summary.

Step 4: Select Date Range.

Step 5: Select dropdown for Office/Section.

Step 6: For individual select User name and Click on View Report.

6.16 How can user customize output fields for the generated reports?

Reports output field can be customized by using the following steps:

Step 1: Go to respective sub module.

Step 2: Select report type Detailed.

Step 3: Manage output fields by clicking on check boxes.

Note: Output fields customization is only available for detailed reports.

6.17 How to generate reports for dispatch by CRU?

Following are steps for generating dispatch by CRU report

Step 1: Go to Dispatch.

Step 2: Move the cursor to CRU Dispatch.

Step 3: Select Date Range.

Step 4: Select dropdown for Office/Section.

Step 5: Click on View Report.

Note: Output fields customization is available for CRU Dispatch reports.

6.18 Can top officer view pendency report of his/her subordinates?

Yes. In Hierarchical view Officer can view subordinates pendency.

Note: Hierarchy can be set from EMD.

6.19 How to generate report against VIP entries which are entered during diarisation process?

Following are steps for generating generate report against VIP entries which are entered during diarisation process

Step 1: Go to VIP; Move the cursor to VIP Diary Register.

Step 3: Select Report type Detailed.

Step 4: Select Date Range.

Step 5: Select dropdown for All VIP/Non VIP.

Step 6: Select dropdown for Respective VIP Name, Click on View Report.

6.20 Is there any reminder report available which are set for Issued letter?

Yes. Following are steps for generating reminder report.

Step 1: Go to Miscellaneous.

Step 2: Move the cursor to Reminder Follow up Reply received after due date/ Follow up Reply received before due date/Reply Due.

Step 3: Select Report type.

Step 4: Select Date Range.

Step 5: Select Reminder Type.

Step 6: Select dropdown for Office/Section and respective department

Step 7: Click on View Report

6.21 Can user generate report for pendency of file/receipt for all users on single click?

No.

6.22 How to generate reports for old physical files which are migrated to e-Office?

Yes. Following are steps for generating migration report-

Step 1: Go to File.

Step 2: Move the cursor to File Migration.

Step 3: Select report type Summary.

Step 4: Select Date Range.

Step 5: Select dropdown for Office/Section.

Step 6: Click on View Report.

6.23 From where user can find any manual or supporting document w.r.t MIS categories?

Manuals and supporting documents are available in help option of MIS report.

Step 1: Go to e-File MIS Reports.

Step 2: Move the cursor to Help menu on the top right

Step 3: Select Report Description for supporting document of MIS/Release Note

6.24 In how many format user can save the generated report?

Generated report can saved in two mentioned formats: PDF and EXCEL

6.25 Is there any date range to generate reports?

Yes. In month wise- 6 months, In Detailed and summary- 1 month.

6.26 What is pending range?

Pending range is date span for defining pendency with respect to files/receipt.

7. Settings

7.1 Can user get alerts for the incoming file?

Yes. There is option of SMS and email alerts from the Settings of File Management System.

Step 1: Click on **Settings**.

Step 2: Go to **Preferences** option.

Step 3: Enter the **mobile Number** and **email id** in Alert Settings.

Step 4: Click on **Save** button.

7.2 Can user customize number of records per page in file/receipt inbox?

Yes. Steps are as follows:

Step 1: Go to **Settings**.

Step 2: Click on **Preferences**.

Step 3: Select from Max # of records/page

Step 4: Click on **Save**.

7.3 Can user skip authentication through DSC at the time of login into FMS?

Yes. DSC can be configured for the Authentication, Signing or Both.

Step 1: Go to **Settings**.

Step 2: Click on **Preferences**.

Step 3: Select **Authentication, Signing or Both** in DSC setting under DSC Settings

Step 4: Click on **Save**.

7.4 Can user customize the default size of noting/ draft page?

Yes. Default size of noting/ draft page can be customized.

Step 1: Go to **Settings**.

Step 2: Click on **Preferences**.

Step 3: Mark check for Noting Expanded View and/ or Draft Expanded View under Editor Setting.

Step 4: Click on **Save**.

7.5 Can user customize correspondence size and type?

Yes. Correspondence can be customized as per size and type.

Step 1: Go to **Settings**.

Step 2: Click on **Preferences**.

Step 3: Mention value for correspondence size and select Correspondence View Type under Correspondence View Settings

Step 4: Click on **Save** button.

7.6 How to add contacts to address book and its purposes?

Select "Add to address book" to save address to address-book. The address saved in the address-book can be used in future. Addresses saved in the address book by any user will be available to all users of the department.

Address book can also be managed explicitly from settings.

Steps are mentioned below:

Step 1: Expand Settings.

Step 2: Click on **Address Book**.

Step 3: Click on **address** to edit address details.

Step 4: Click on **Save** Button.

8. Search

8.1 Is basic search is able to search file/receipt/dispatch resides anywhere in user account?

Yes, but at a time it searches on the page which is opened. If user wants to search any file/receipt/dispatch without knowing its current position i.e. inbox/sent/parked/closed then user have to use advance search.

8.2 How to search a particular file/receipt in Inbox/sent/Closed?

Through basic search user can search the File/Receipt by computer no., File No. or subject. Steps are mentioned below:

Step 1: Open the respective link i.e. **inbox, sent or closed of File/Receipt**.

Step 2: Type in the required **computer no., file no., receipt no. or subject** in the Basic Search field.

Step 3: Click on **Search button**.

8.3 What is the difference between Search and Advanced Search?

Basic search: This search facilitates the user to search for any Receipt/File residing in their Inbox/Sent/Created or Parked section.

Advanced Search: This search facilitates the user to search for any Receipt/File/Issue residing anywhere in the Organization.

8.4 What is the use of Advance search?

Through Advance search, user can search for any receipt, file or dispatch residing anywhere in the organization/ section hierarchy downline/ section.

8.5 Is it possible to take printout of the result after searching a file/receipt?

Yes. User can generate PDF of the result for the output Fields selected. For generating a PDF an icon has been provided under the search file/receipt button on the right side.

8.6 What actions can user take on the file which has been searched with the help of Advance search and the file is present in his/ her account?

Different actions can be taken for different cases, if the file is in-

Case 1- Inbox/created: can Send the file, receive the physical file and view the details of the file.

Case 2- Parked: can view the details of that file and can also Make active.

Case 3- Closed: can Re-open file and can View that file.

8.7 What actions can user take on the file which has been searched with the help of Advance search and the file is in others account?

There are different actions can be taken for different cases, if the file is in-

Case 1- Inbox/ Created/ Parked: can Pull up the file and view the details of the file.

Case 2- Closed: can view details of the file.

8.8 Is it possible to take print out of details and movements of any particular file?

Yes. Steps are mentioned below:

Step 1: Search the file through **Advanced Search**.

Step 2: Search for the file.

Step 3: Click on **Details**.

Step 4: Click on **PDF icon** at the top most on the right side.

Step 5: Take print out from the PDF.

8.9 How to search files by using File heads?

Steps are mentioned below:

Step 1: Go to **Advanced search**.

Step 2: Click on **Advance Parameter**.

Step 3: Select the **file heads**.

Step 4: Click on **Search button**.

8.10 How to search files on the basis of creation date?

Steps are mentioned below:

Step 1: Go to **Advanced search**.

Step 2: Click on **Advance Parameter**.

Step 3: Select the **date range** in creation date.

Step 4: Click on **Search button**.

9. General

9.1 Explain the terms Global Search, Departmental Search, Section Hierarchy Downline Search and Section Search?

Global Search: User can search a File/ Receipt/ Dispatch globally within instance.

Departmental Search: User can search a File/ Receipt/ Dispatch within a department in a instance.

Section Hierarchy Downline Search: User can search a File/ Receipt/ Dispatch down the hierarchy, i.e., the officer can search a File/ Receipt of their sub ordinates.

Section Search: User can search a File/ Receipt/ Dispatch within their section (O.U.)

9.2 How do user access eOffice?

Open Internet Explorer/Fire Fox browser and in the address bar type the URL of the eOffice application and type the user name and password in the login screen.

9.3 Can user change Login Id & Password?

A user cannot change his/her login id by himself/herself but need to contact the administrator.

A user can change his/her password by himself/herself by logging into www.mail.gov.in

9.4 Where can user set the Time Period to view particular Receipts or Files?

In the Date Range provided on the top, user can set the required period for which he/she wishes to view the Receipts/Files.

9.5 What is the difference between Pull back and Pull up?

Pull back: It refers to the process of pulling back the sent receipt/file, till the time the recipient has not opened it.

Pull up: It refers to the process of pulling back the sent receipt/file forcefully even if the recipient has opened it.

9.6 What is Hierarchical view?

This view facilitates the user to view their own files and receipts as well as files/receipts of their section.