

eOffice Quick Reference Manual

Table of Contents

1	Introduction	3
2	eFile Modules	4
2.1	Receipts	4
2.1.1	Receipt (Tappal/Inward) registration in eFile	4
2.1.2	Sending the Receipt for further actions	5
2.1.3	Inbox	6
2.1.4	Sent	7
2.1.5	Closed	7
2.2	Files	8
2.2.1	Creating a new electronic file in eFile	8
2.2.2	Sending the File for further actions	10
2.2.3	Inbox	11
2.2.4	Various actions performed in an electronic file	12
a	Writing Green Note	12
b	Writing Yellow Note	12
c	Viewing the previous note	13
d	Quick view Button	13
e	TOC/Recent/All	13
2.2.5	Creating a new Draft in a File	13
2.2.6	Approving and Dispatching the draft	14
2.2.7	Closing the file	16
2.2.8	Linking and Attaching of Files/Receipts	16
2.3	File Migration	21
2.4	Other useful features available in eFile	25
2.4.1	Searching and Tracking of Files/Receipts/Dispatch	25
2.4.2	Parking	26
2.4.3	Pull up	27
2.5	DSC (Digital Signature Certificate)	27
3	Validating Digital Signature	28
4	Clearing of Java Cache	31
5	eFile MIS Report	34

1. Introduction

The need for transforming conventional government offices into more efficient and transparent e-offices, eliminating huge amounts of paperwork has long been felt. The eOffice product pioneered by National Informatics Centre (NIC) aims to support governance by using in more effective and transparent inter and intra-government processes.

An automated office attempts to perform the functions of ordinary office by means of a computerized system. In a manual office scenario, there are thousands of letters and files and their manual tracking is not a very easy task. A computerized File Tracking System enables users to track these letters and files within seconds. Also, dispatch and record keeping are made easy. It ensures proper distribution of work load, thus increasing the efficiency of the system and bringing transparency to the system. The system simulates the manual system in a digital environment.

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

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

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

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

2. eFile Modules

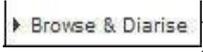
Different sections that constitute eFile application are Receipts, Files, Dispatch, Migrate Files, DSC, Settings, Notification and so on. Each section comprises of different links that helps the user to easily utilize the functionalities of different sections of the eFile.

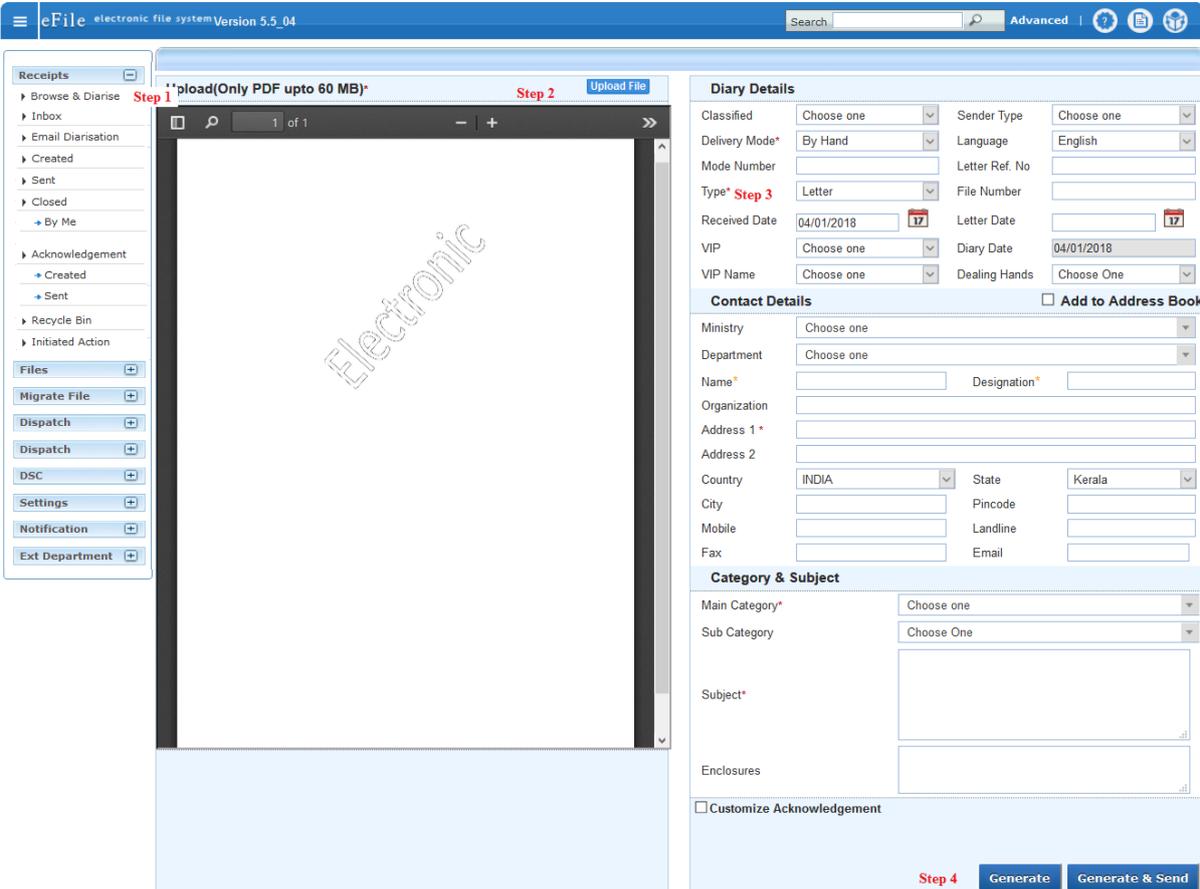
2.1 Receipts

In eFile system the 'Tappals/Inwards' are represented by the term 'Receipts'. In eFile, receipts are created by the CRU (Tappal/Office section) which is further attached with the file to get processed and approved from the higher authority.

2.1.1 Receipts (Tappals/Inwards) registration in eFile

The first process in eFile to register a Receipt is, scan the physically received paper based receipts in to a pdf document and save it in the computer system. Then perform the following steps in eFile application.

1. Click the **Browse and Diarise** () option of **Receipts** menu, as shown in Fig.eFile.1:



The screenshot displays the eFile application interface for registering a receipt. The interface is divided into several sections:

- Navigation Menu (Left):** Includes 'Receipts' (expanded), 'Browse & Diarise', 'Inbox', 'Email Diarisation', 'Created', 'Sent', 'Closed', 'By Me', 'Acknowledgement', 'Recycle Bin', and 'Initiated Action'. Below these are buttons for 'Files', 'Migrate File', 'Dispatch', 'DSC', 'Settings', 'Notification', and 'Ext Department'.
- File Upload Area (Center):** Shows a file upload progress bar for 'upload(Only PDF upto 60 MB)'. It includes a 'Browse & Diarise' button (Step 1), a file viewer showing a document with a large 'Electronic' watermark, and an 'Upload File' button (Step 2).
- Form (Right):** Contains fields for 'Diary Details' (Classified, Delivery Mode, Mode Number, Type, Received Date, VIP, VIP Name, Sender Type, Language, Letter Ref. No, Letter Date, Diary Date, Dealing Hands) and 'Contact Details' (Ministry, Department, Name, Designation, Organization, Address 1, Address 2, Country, State, City, Pincode, Mobile, Landline, Fax, Email). There is also a 'Category & Subject' section with 'Main Category', 'Sub Category', and 'Subject' fields, and an 'Enclosures' field. A 'Customize Acknowledgement' checkbox is at the bottom.
- Buttons (Bottom Right):** 'Generate' (Step 4) and 'Generate & Send' buttons.

Fig.eFile1

2. Click the Upload File () button from the **Browse and Diarise** screen to upload the scanned receipt.
3. Enter the essential details in all the mandatory fields in **Browse and Diarise** Page.
4. Click the **Generate** () button on **Browse and Diarise** page to generate a **unique Receipt (Tappal/Inward) number**.

There are 10 options provided, those are associated with an Electronic receipt created:



- a) **Send** → User can use this option to send the generated receipts to other user to work at a later stage.
- b) **Put in File** → User can use this option to attach the generated receipt to an existing live file.
- c) **Copy** → User can use this option to copy the metadata fields automatically and can edit the metadata fields as per requirement and by uploading a new scanned receipt document the user can generate a new electronic receipt.
- d) **Dispatch** → User can use this option to Dispatch the electronic receipt
- e) **Details** → User can use this option to view the details of the generated/received receipts such as **Dispatch History, Referenced files, Referenced Receipts and Detach Receipts**.
- f) **Movement** → User can use this option to track the **Movements** of the receipt which automatically gets updated as Receipt moves further
- g) **Edit** → User can use this option to edit the Metadata fields of the Receipt before sending it to the intended recipient.
- h) **Attach Files** → User can use this option to attach the receipt with the File.
- i) **Attach Receipts** → User can use this option to attach the working receipt/document with the other Receipt(s) irrespective of the receipt nature.
- j) **Generate Acknowledgement** → User can use this option to generate an acknowledgment to a created receipt.

2.1.2 Sending the Receipt for further action

By clicking on **Send** option the user can send the generated receipts to other user to work at a later stage. As a result the following send window appears (Fig.eFile.2). By providing the user address in '**To**' field (Mandatory) the user can send the receipt for further actions.

Send | Put in a File | Copy | Dispatch | Details | Movements | Edit | Attach File | Attach Receipt | Generate Acknowledgement

All Reporting Officer Sub-ordinates Recent 5 Send Back In Channel Preferred List

Note: Name of the creator is highlighted in yellow colour.

To

Cc
(Use semicolon(;)) to separate recipients.)
Note : CC copies are non-editable (both pdf and metadata). Any change in the Main receipt will be reflected in the CC copies, till the time not put inside the file

Set Due Date

Action

Priority

Total 1000 | 1000 characters left.

Remarks

Receipt Number	Subject
<input checked="" type="checkbox"/> 706421/2018/IT	Administrative Secretariat

Fig.eFile.2

Cc → Used to send the copies of the receipt to different user. Multiple user address can be entered by providing semicolon (;).

Set Due Date → Used to provide a due date indication to the recipient.

Action → Indication given to the recipient what action has to performed on receipt

Priority → The user can set the priority to process the receipt. (Immediate, Most Immediate, Out Today)

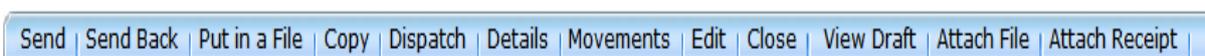
Remarks → Remarks can be typed (if required) while sending the receipt.

All the above said entries are optional except ‘To’ field.

2.1.3 Inbox

Inbox option contains the list of all the receipts that are received as an Inward Correspondence. User has to click the Receipt number to view the receipt. As a result, the user can view the content of receipt along with the details. Character ‘E’ symbolizes Electronic Receipt.

There are 12 Links provided under Receipt Inbox:



a) **Send Back** → This link helps the user to reply to the sender of the Receipt.

- b) **Close** → This link helps the user to close a receipt by providing the closing remarks.
- c) **View Draft** → User can use this option to view the drafts that are already created with receipt.

The remaining all other link's functionalities are same as explained in 2.1.1

2.1.4 Sent

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

User can view all the sent receipts, by clicking the **Sent** link under the **Receipts** section. As a result, the Sent Receipts screen appears as shown in Fig.eFile.3. There are 4 links provided under Sent Section of receipt:

Computer No.	Receipt No.	Subject	Sender	Sent to	Sent On	Due On	Pull Back Icon
E 705601	705601(2)/2017/IT	Life Mission	Panchayath deputy directr	SO-IT,IT	05/01/18 11:19	13/11/17	Initiate Action
E 705574	705574/2017/IT	ARRANGEMENT OF WORKING CAPITAL REG	KUTTIADI COCONUT	DS-IT,IT	05/01/18 11:17	01/11/17	Initiate Action
E 705428	705428/2017/IT	Rural Development	Commissionerate of Rural Development,	AS-IT,IT	21/11/17 02:32	-	Initiate Action
E 704208	704208/2017/IT	governance needed	principal secretary	AS-IT,IT	21/11/17 02:31	-	Initiate Action
E 705574	705574/2017/IT	ARRANGEMENT OF WORKING CAPITAL REG	KUTTIADI COCONUT	DS-IT,IT	01/11/17 04:43	-	Initiate Action
E 705455	705455/2017/IT	RELAXATION IN POINTS OF SANCTION COMMUNICATION REG...	babu	DS-IT,IT	26/10/17 05:03	28/10/17	Initiate Action
E 705455	705455/2017/IT	RELAXATION IN POINTS OF SANCTION COMMUNICATION REG...	babu	SREEJITH E S,C DCKKD	26/10/17 04:41	-	Initiate Action
E 705438	705438/2017/IT	rural	Commissionerate of Rural Development,	CA-IT,IT	24/10/17 02:16	-	Initiate Action

Fig.eFile.3

View → User can use this option to list the Receipts depending upon its current state. i.e. (Electronic, VIP References, All)

User can also Pull back the sent receipt from the intended recipient even when the receipt is in the Inbox of the recipient, using the **Pull Back** () link. In case, the recipient has opened the receipt, then pullback option is inaccessible.

2.1.5 Closed

Closed option contains a list of all the receipts that are marked as closed as shown in Fig.eFile.4.

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

To Re-open any Receipt user has to perform following steps:

Select the Closed receipt which needs to be Re-Open and click the Re-open option available, as shown in Fig.eFile.4. As a result, a confirm message to re-open the receipt will appear. The re-opened receipts will be moved to the inbox by clicking on the OK button of confirmation message.

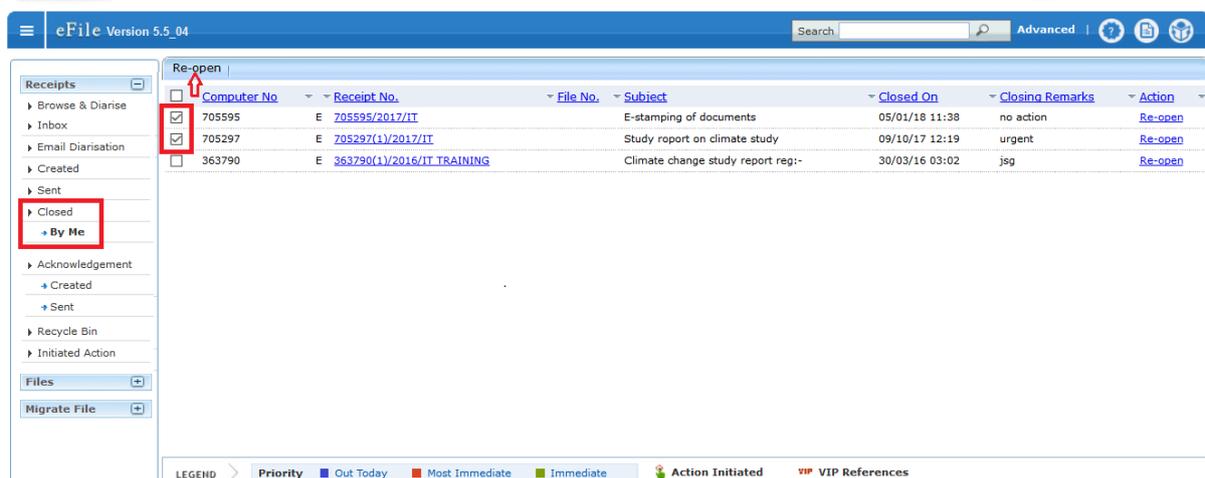


Fig.eFile.4

2.2 Files

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

2.2.1 Creating a new electronic file in eFile

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

To create a New File user has to perform the following steps:

1. Click on **Create New** option from the Left navigation panel under the **File** section, as a result, File Cover Page screen appears. (Fig.eFile.5) Add File No.
2. Enter the necessary details on the File Cover Page. Subject Description is a Mandatory field along with File No
3. After filling the necessary details, click the Continue Working () button to create a new file.

As a result, file gets created, along with a unique file number based on the selection of heads. (Fig.eFile.5.1)

The screenshot shows a web form for file creation. At the top, it says 'Govt. of Kerala' and 'Kerala ITD ITD'. Below this is a 'File No.*' section with four dropdown menus labeled 'Cho', a year field set to '2018', and a dropdown set to 'ITD'. A 'Subject' field is below that. A 'Description*' text area follows. Then there are 'Category' dropdowns for 'Main' and 'Sub', both set to 'Choose one'. An 'Other Details' section contains a 'Classified' dropdown set to 'Choose One', a 'Remarks' text area, and two reference fields: 'Previous Reference' and 'Later Reference'. At the bottom is a 'Continue Working' button with a right-pointing arrow. Three callout boxes are present: 'Step 1' points to the 'File No.*' dropdowns, 'Step 2' points to the 'Subject' field, and 'Step 3' points to the 'Continue Working' button.

Fig.eFile.5

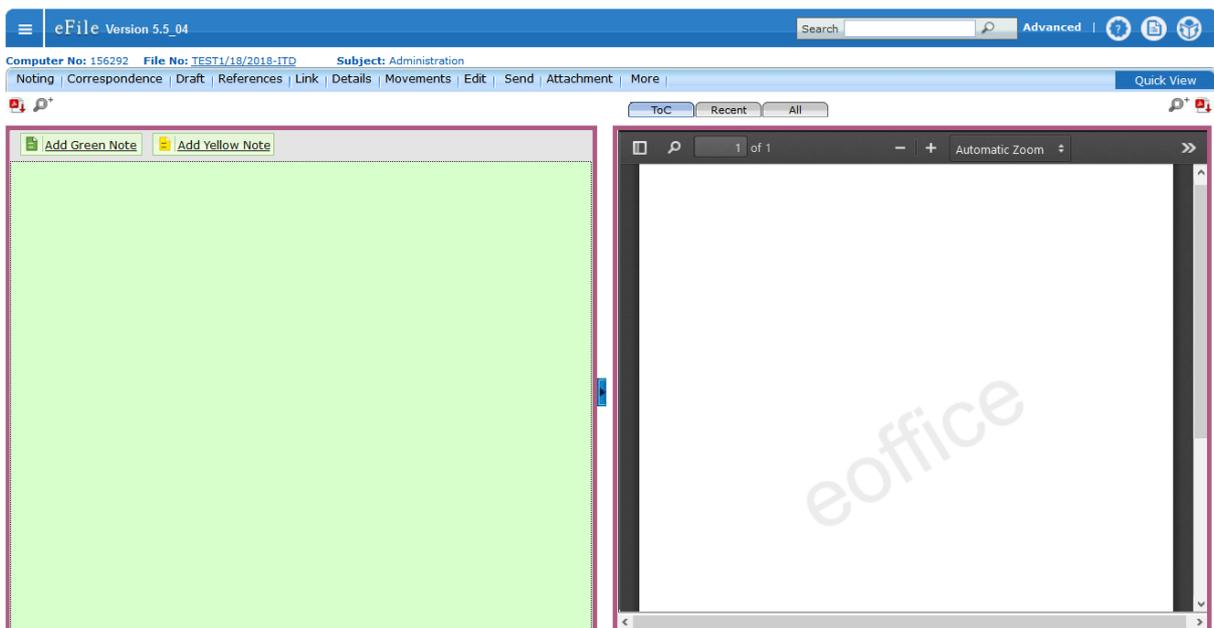


Fig.eFile.5.1

User can perform 11 different operations on a file, For instance:

Noting | Correspondence | Draft | References | Link | Details | Movements | Edit | Send | Attachment | More

- a) **Noting** → With the help of this feature user can view the existing notes in a file. There are three different view options (View by Name, View by Date and View All) available for the user.
- b) **Correspondence** → With the help of this feature user can attach correspondence/ Receipt to the working File.
- c) **Draft** → With the help of this feature user can create New Draft and View existing Drafts in the File.
- d) **Reference** → With the help of this feature user can attach references corresponding to the working File.
- e) **Link** → With the help of this feature user can Link and delink other eFile(s) to the working file. It contains 2 sub links:
 - Internal Files:* - This sub link helps the user to link/delink any other file from within the Organisation
 - Linked In Files:* - This sub link helps the user to view other Files that are linked from some other Organisation with the working file.
- f) **Details** → With the help of this feature user can view the details file and also can view the total number of part files created.
- g) **Movements** → With the help of this feature user can have a track on the Running File and can view all the movements.
- h) **Edit** → With the help of this feature user can make changes to the cover page of existing running file except the Basic and corresponding Heads.
- i) **Send** → With the help of this feature user can send the File to the Recipient.
- j) **Attachment** → With the help of this feature the user can attach other related Files or Receipts to the working file.
- k) **More** → With the help of this feature user can **Park** or **Close** the working file.

2.2.2 Sending the File for further actions

By clicking on **Send** option the user can send the created file to other user to work at a later stage. As a result, the following send window appears (Fig.eFile.6). By providing the user address in '**To**' field (Mandatory) the user can send the file for further actions.

The screenshot shows the 'Send' window in the eFile application. At the top, there's a navigation bar with 'Noting | Correspondence | Draft | References | Link | Details | Movements | Edit | Send | Attachment | More'. Below this, there are radio buttons for 'All', 'Reporting Officer', 'Sub-ordinates', 'Recent 5', 'Send Back', 'In Channel', and 'Preferred List'. A note states: 'Note: Name of the creator is highlighted in yellow colour.' The main form has several sections:

- To:** A text input field.
- Notify Through:** Checkboxes for 'Email' (checked) and 'SMS'.
- Set Due Date:** A date picker.
- Action:** A dropdown menu with 'Forward' selected.
- Priority:** A dropdown menu with 'Choose one' selected.
- Remarks:** A text area with a character count: 'Total 1000 | 1000 characters left.'
- File Number:** A table with columns 'File Number', 'Subject', and 'Note (Chars)'. The row shows 'TEST1/18/2018-ITD', 'Administration', and '0'. A note below says: 'Note: Bulk signing maximum allowed characters- 1000000 Total(Formatting included): 0'.

 A 'Send' button is located at the bottom left of the form.

Fig.eFile.6

Set Due Date → Used to provide a due date indication to the recipient.

Action → Indication given to the recipient what action has to be performed on File

Priority → The user can set the priority to process the File. (Immediate, Most Immediate, Out Today)

Remarks → Remarks can be typed (if required) while sending the File.

All the above said entries are optional except ‘To’ field. The user can also provide a notification alert through email/sms to the recipient.

2.2.3 Inbox

Inbox option contains the list of all the Files that are received by the user for further actions. User has to click the File No. to view the Content of the file (Notes/Correspondence/Draft etc.).

The following Fig.eFile.7 shows the File inbox listing Screen.

Computer No	File Number	Subject	Sent By	Sent On	Due On	Read On	Remarks
E 155637	2 TEST1/1254/2017-ITD	accountss	SO-IT,IT	05/01/18 12:38	-	-	
E 156287	TEST1/14/2018-ITD	newfile	ASST-ITD,IT	04/01/18 02:37	-	04/01/18 02:40	
E 156285	TEST1/13/2018-ITD	newfile1	ASST-ITD,IT	04/01/18 02:05	-	04/01/18 02:10	
E 156277	TEST1/10/2018-ITD	New file	US-IT,IT	03/01/18 03:32	-	03/01/18 03:34	
E 156245	TEST1/1374/2017-ITD	IT Department	ASST-ITD,IT	27/12/17 03:14	-	27/12/17 03:20	
E 153954	TEST1/771/2017-ITD	common	SO-IT,IT	27/12/17 12:42	-	27/12/17 12:45	
E 156111	TEST1/1387/2017-ITD	abcd	SO-IT,IT	21/12/17 10:53	-	21/12/17 10:54	
E 153964	TEST1/774/2017-ITD	general transfer	ASST-ITD,IT	18/12/17 02:54	-	18/12/17 02:55	
E 155954	TEST1/1361/2017-ITD	dgbv	SO-IT,IT	15/12/17 03:51	-	-	
E 155952	TEST1/1359/2017-ITD	Test	CA-IT,IT	15/12/17 03:02	-	-	
E 155945	TEST1/1358/2017-ITD	rural development	CA-IT,IT	15/12/17 02:48	-	15/12/17 02:49	
E 155898	TEST1/1355/2017-ITD	Animal Husbandry Department	ASST-ITD,IT	13/12/17 02:03	-	13/12/17 02:05	
P 155840	TEST1/1342/2017-ITD	fgfhgfhg	SO-IT,IT	04/12/17 12:47	-	04/12/17 12:50	
E 155824	TEST1/1335/2017-ITD	abcytuu y7	JS-IT,IT	29/11/17 10:40	-	29/11/17 01:54	
E 155775	TEST1/1306/2017-ITD	report on climate change study	SO-IT,IT	25/11/17 05:05	-	25/11/17 05:05	

LEGEND > Priority: Out Today (Blue), Most Immediate (Red), Immediate (Green). Action Initiated (Green), Other Department (Red), Files with Draft (Green). Draft Note (Blue), Yellow Note (Yellow), External Files (Blue).

Fig.eFile.7

1. ■ The Priority of the file (Blue – Out Today, Red – Most Immediate, Green – Immediate)
2. ■ The file with Yellow Note
3. 📄 File with Draft
4. 📄 File with Note in draft Stage
5. 📎 File with attachment (Other Files/Receipts)
6. 🗒 The Remarks provided by the sender while sending the file can be viewed by clicking on this icon.

User can perform 12 different operations on a file, which is opened from the inbox



2.2.4 Various actions performed in an electronic file

The various operations that can be performed on electronic file which is opened from the Inbox are as follows (Fig.eFile.8).

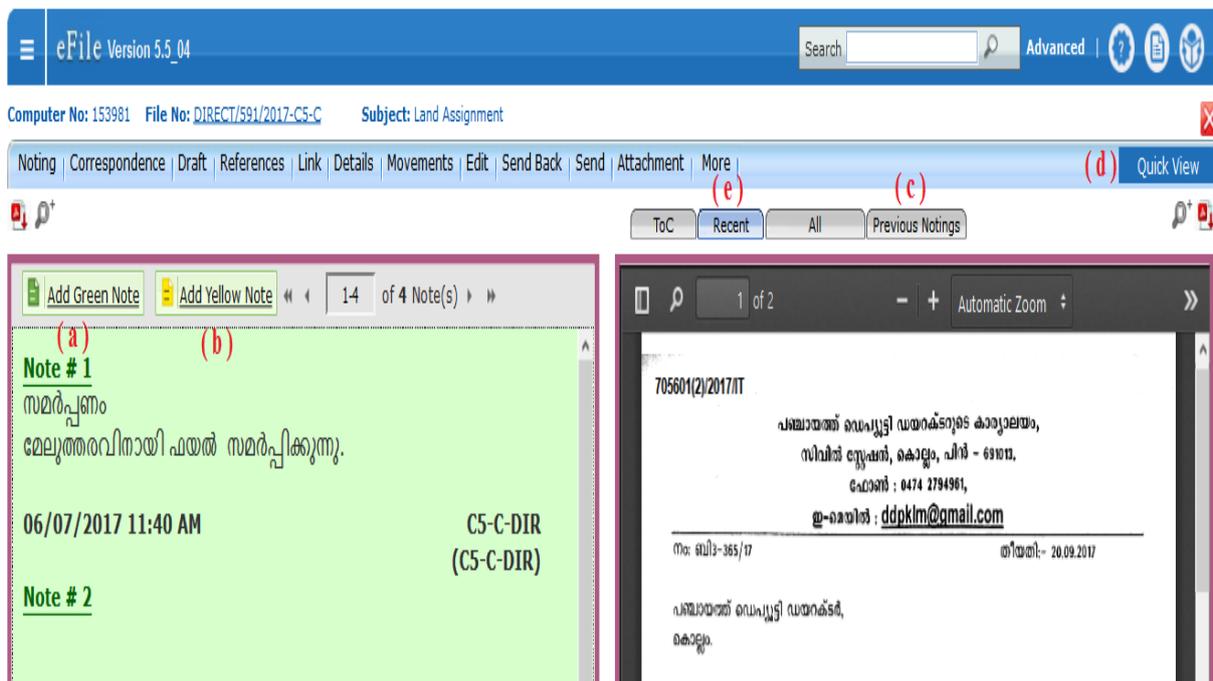


Fig.eFile.8

(a) Writing Green Note

Commonly used method for writing notes in a file. Green Note cannot modify/delete/cancel after the file is forwarded for further actions.

The user can use ‘Add Green Note’ Button to write the green note in a file. User will be getting an editor with limited formatting tools; and can type the notes in English as well as in local language (Malayalam). The typed notes will be auto saved.

(b) Writing Yellow Note

Rarely used mechanism for writing note in a file. It is rough noting mechanism. The yellow note can be Edited/Discarded/Confirmed. Once the yellow note gets confirmed, noting gets finalized and saved to main Green sheet noting of File.

The user can use ‘**Add Yellow Note**’ Button to write the yellow note in a file. User will be getting an editor with limited formatting tools; and can type the notes in English as well as in local language (Malayalam). The typed notes will be auto saved.

At a time only one noting will be active, either yellow note or Main Green sheet note.

(c) Viewing the previous note

While typing the new note (green/yellow) in file the user can view the previous notes of the file by clicking on the ‘**Previous Notings**’ Button.

(d) Quick view Button

By using this tool, the user can view the Correspondence/ Draft/Previous Notes of the file in separate window while typing the new note (green/Yellow). A convenient mechanism to view the file’s Note, correspondence and Draft simultaneously.

(e) TOC/Recent/All

TOC → Table of Content of Correspondence/Issues in the File. (List view)

Recent → This options shows the recently attached Correspondence/ Issues in the File.

All → This option shows all the Correspondence/Issues in the File.

2.2.5 Creating a new Draft in a File

To create a new draft in a file first the user has to open the concerned file and chose the link **Draft** → **Create new Draft**; as a result the following window with a word editor will be opened (Fig.eFile.9) then perform the following steps.

1. Provide the Meta data about the draft by entering the entire mandatory field in ‘**Draft details**’ and ‘**Communication details**’ category.
2. The user can prepare the draft by opting any one of the three methods available.
 - (i) Directly typing the draft content in editor itself
 - (ii) Choose the draft template from the ‘**Choose From Template**’ option and add the draft content in it.

- (iii) Use the **‘Upload File’** option to upload the draft file prepared separately by using Microsoft Word / Open Office word processing applications
3. Click on **‘Save’** Button to save the draft. (Draft’s are not auto saved like notes)

The user can use **‘Quick View’** option to view the notes file/correspondence file/other drafts in file while preparing the draft.

To attach any other supporting document along with draft the user can use **‘Attach File’** option.

The screenshot displays the eFile Version 5.5_04 interface for creating a new draft. The top navigation bar includes a search bar and a 'Quick View' button. The main content area is titled 'New Draft' and features a toolbar with various editing options. The form is divided into three main sections: 'Draft Details', 'Communication Details', and 'Attachments'. The 'Draft Details' section includes fields for Draft Type, Draft Nature, Language, and Subject. The 'Communication Details' section includes fields for Ministry, Department, Name, Designation, Organization, Address, Country, State, City, Pincode, Mobile, Landline, and Fax. The 'Attachments' section has an 'Attach File' button. A 'Save' button is located at the bottom right of the form. The interface also shows a toolbar with various editing options and a search bar at the top.

Fig.eFile.9

2.2.6 Approving and dispatching the draft

To approve a draft in file the authorised user has to open the concerned file first. Then by using link **‘Draft → View draft’** the user can open the draft by clicking on the draft No. As a result the user can view the draft content and the Meta data about the draft in the following screen (Fig.eFile.10).

1. The user can use '**Edit**' button to edit the draft content as well as the Meta data about the draft before approving if necessary. The user can use '**Quick View**' option to view the notes file/correspondence file/other drafts in file while editing the draft content. If the draft's get edited the user can use the "**Save**" Button save the draft.
2. By clicking on the '**Approve**' button the user can approve the draft. One the draft get approved no further change can be possible in the approved draft.

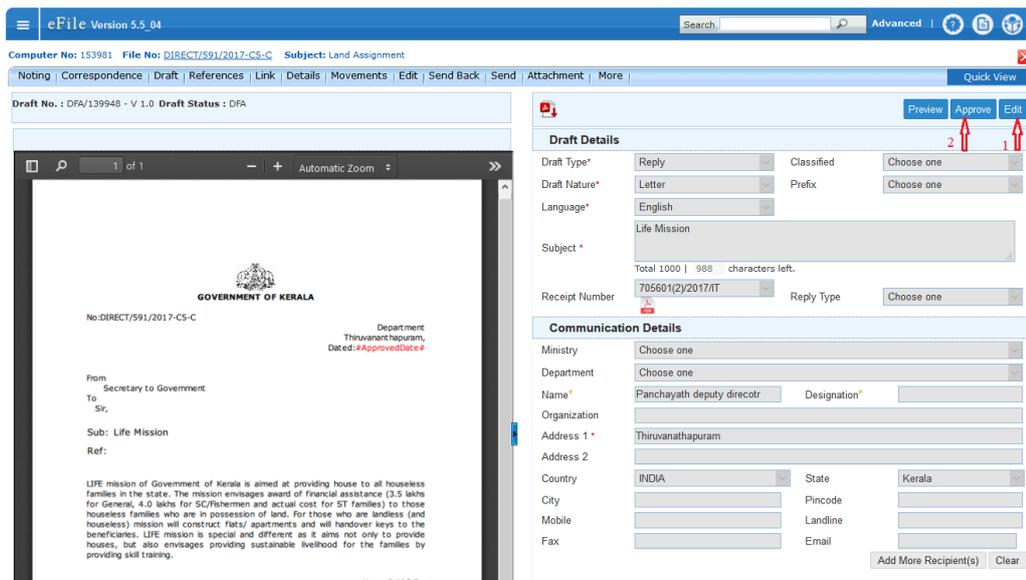


Fig.eFile.10

An approved draft can be dispatched. As result the user will be getting a dispatched window as follows (Fig.eFile.11).

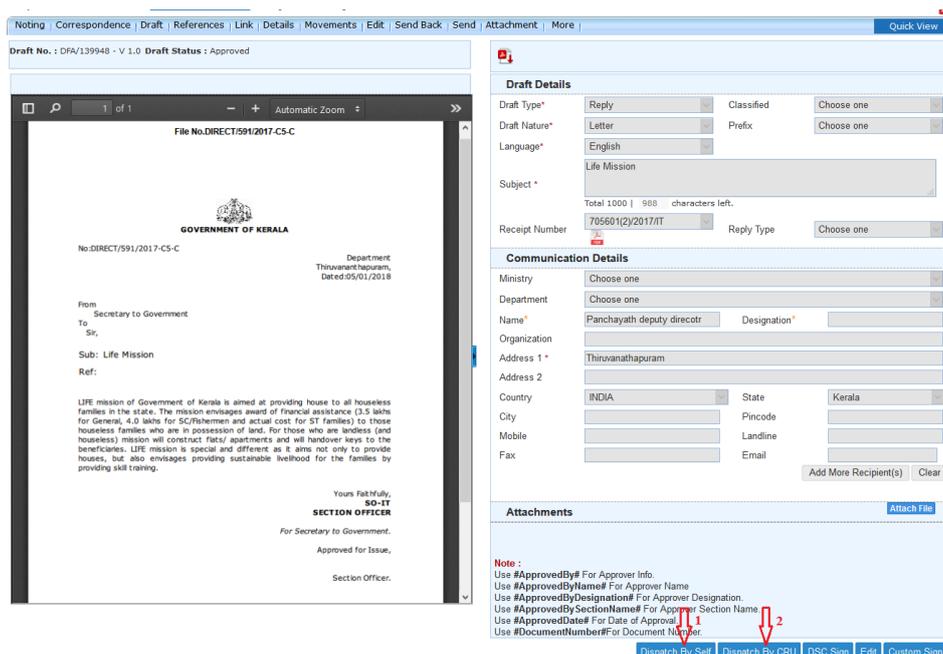


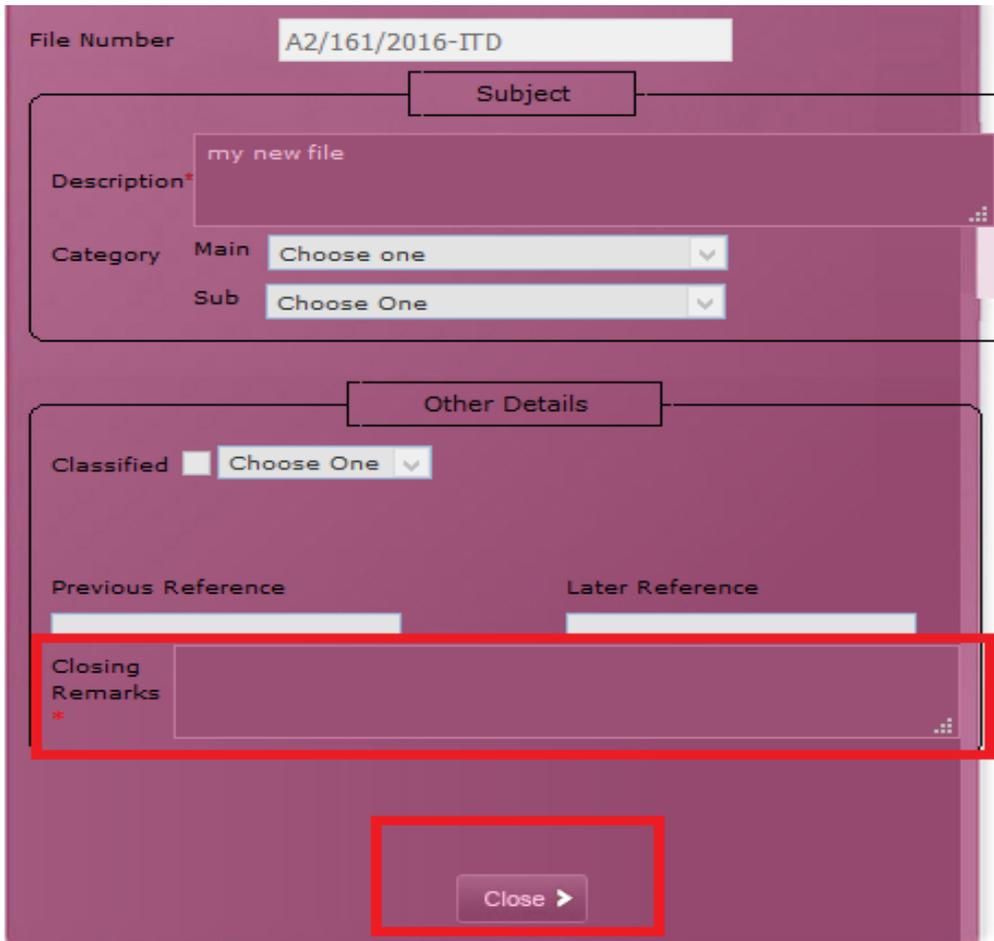
Fig.eFile.11

1. **Dispatch by Self** → The user can self Dispatch the approved draft
2. **Dispatch by CRU** → The user can dispatch the approved draft through CRU. (Central Registry Unit/Dispatch section).

2.2.7 Closing the file

To close a file the user can use the close option from the  Link. More → Close File → Close.

As a result the following window (Fig.eFile.12) will appear. After providing the closing remarks the user can **'Close'** button to close the file.



The screenshot shows a web form for closing a file. At the top, the 'File Number' is 'A2/161/2016-ITD'. Below it is a 'Subject' field. The 'Description' field contains 'my new file'. There are two dropdown menus for 'Category': 'Main' (set to 'Choose one') and 'Sub' (set to 'Choose One'). A 'Classified' field is set to 'Choose One'. There are two text input fields for 'Previous Reference' and 'Later Reference'. A large text area for 'Closing Remarks' is highlighted with a red box. At the bottom, a 'Close' button with a right-pointing arrow is also highlighted with a red box.

Fig.eFile.12

2.2.8 Linking and Attaching of Files/Receipts

Link a File

In eOffice, a file can be linked to another file (may be AD file or the section file itself). While linking, a copy of the file is attached to the corresponding file and not the original file. The original file remains in the Inbox itself.

Open the file from inbox list by clicking on file No. which is to be processed by linking another file. Then perform the following steps.

1. Click on option ‘Link’
2. Choose the first option “Internal files”

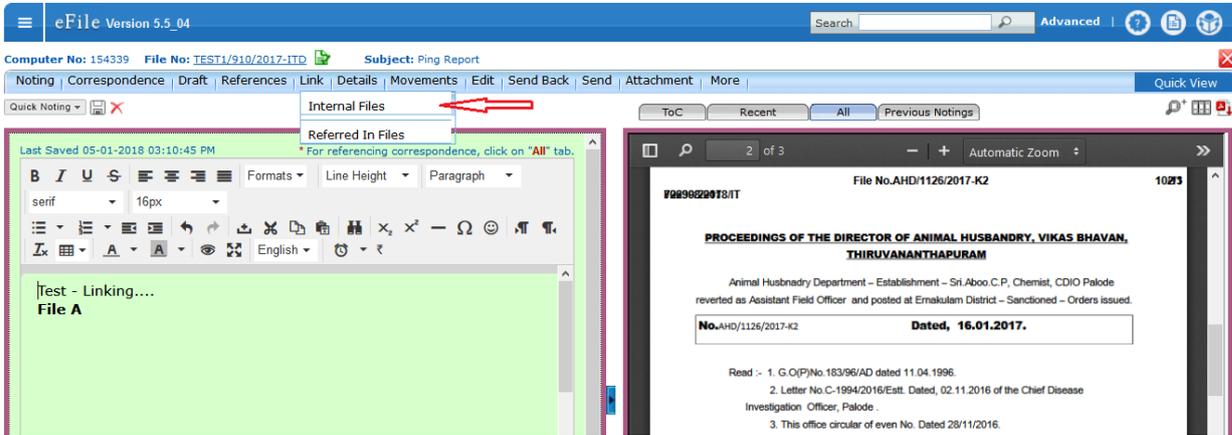


Fig.eFile.13

3. A new window (Link/Delink) appears on the right side. Click on “Attach”

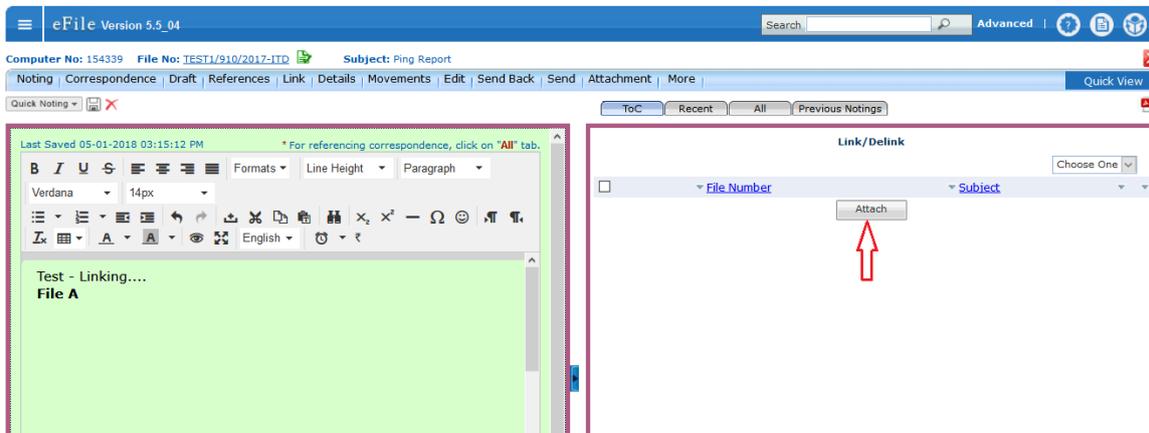


Fig.eFile.14

4. Select the file which is to be linked from the list of files which are there in your ‘inbox’ or ‘completed’ folders displayed in the new window.
5. Then Click on “Attach” Button.

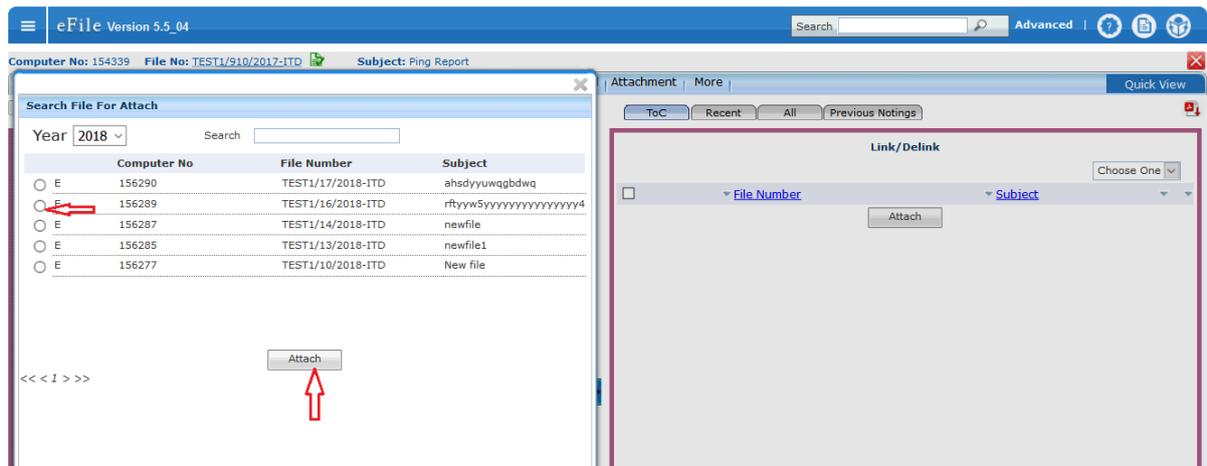


Fig.eFile.15

6. The list of Linked files is shown in right hand side with file nos.

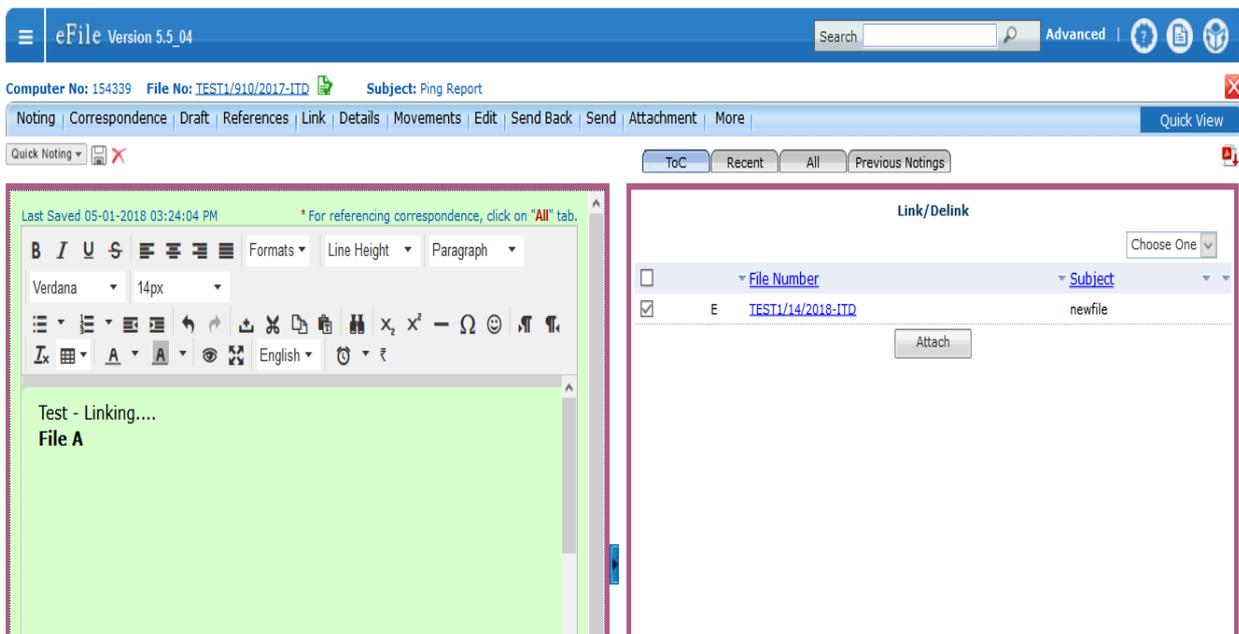


Fig.eFile.16

7. The linked file can be viewed in read only mode in a new window by clicking on the file no.

Delink a File

Open the file from inbox list by clicking on file No. Then perform the following steps.

1. Click on option 'Link'
2. Choose the first option "Internal files"

3. Click the check box near the file number
4. From the “Choose one” option select ‘Delink’
5. A confirmation message appears and click “OK” to delink the file.

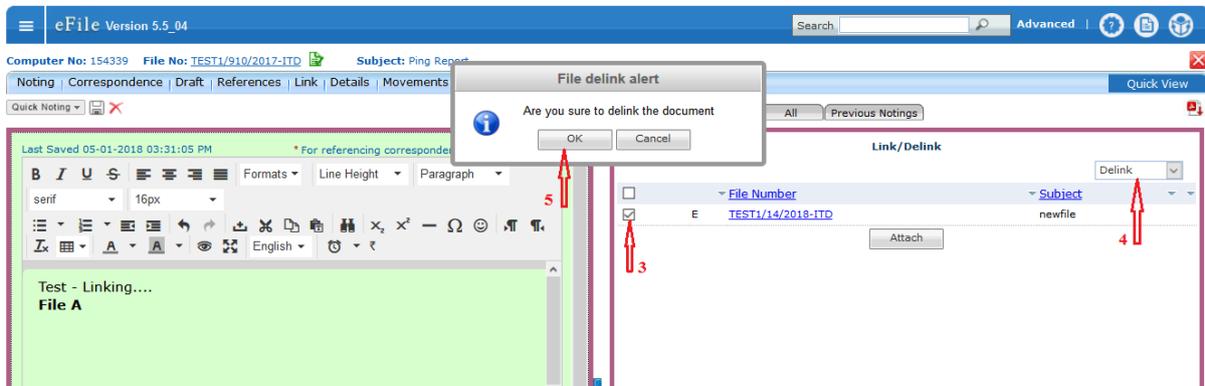


Fig.eFile.17

Attach a File

Attach file mechanism can be used to process a transfer file from one section to other section or it can be used to process a reference file coming from another department. The original file will be attached to the routine file when the users do this process. The attached file should be detached to close the routine file.

1. After Opening the routine file, click on the option **Attachment** → **File**

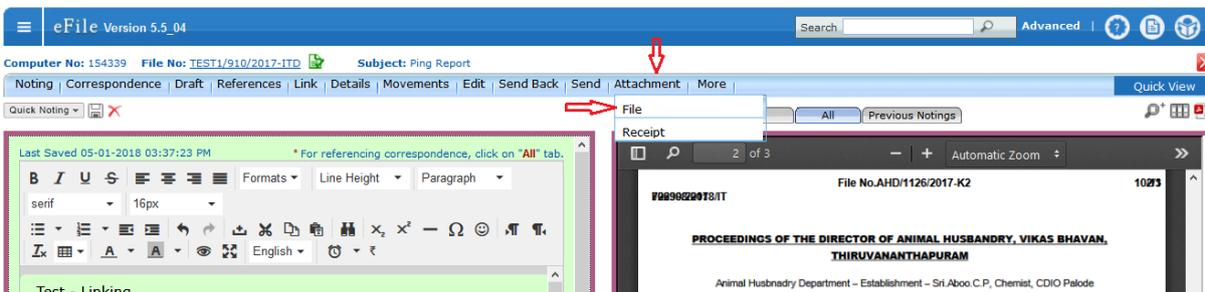


Fig.eFile.18

2. Click on **Attach File**

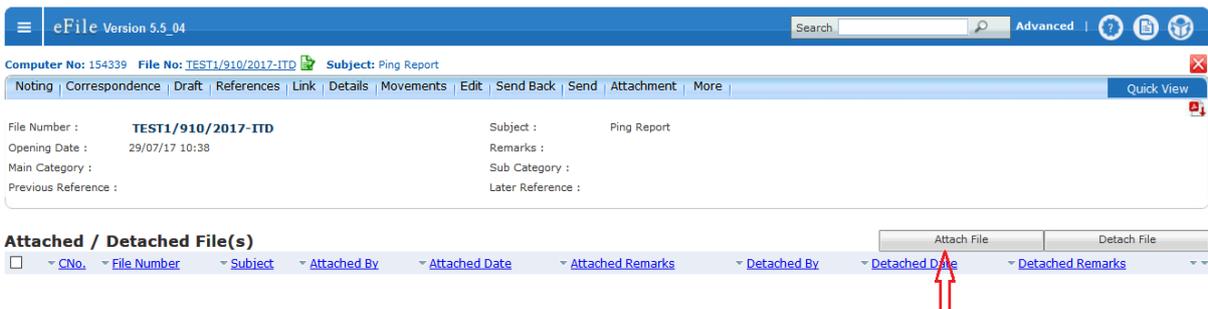


Fig.eFile.19

3. Select the file to be attached from list and click on Attach button, give the remark and click 'OK'

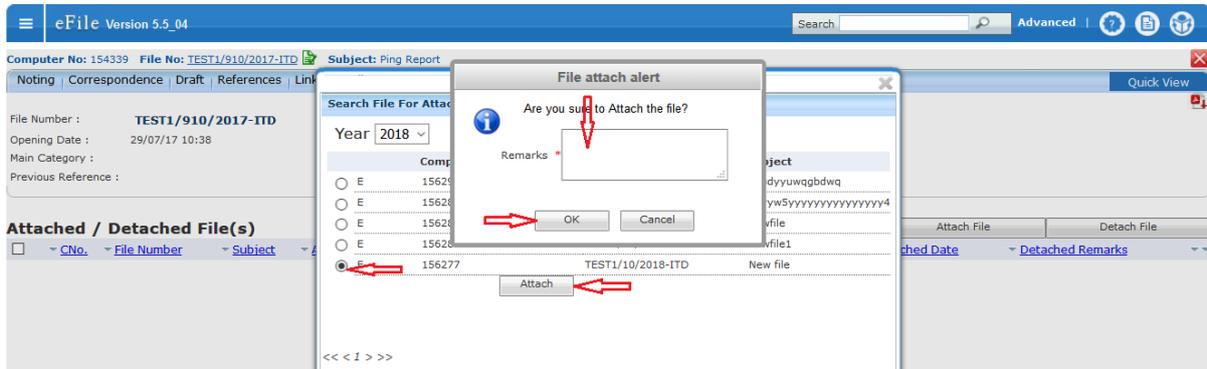


Fig.eFile.20

4. The attached file's details will listed as shown in (Fig.eFile.21) below. The file can be opened in separate window in read only mode by clicking on file no

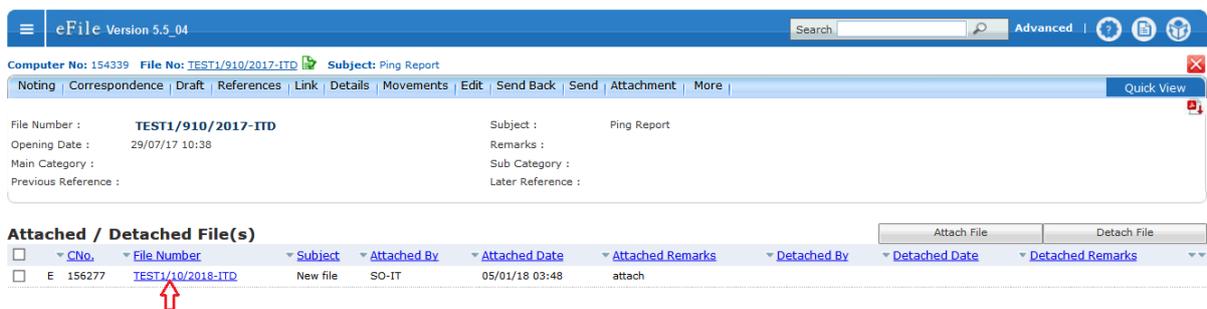


Fig.eFile.21

Detach a File

1. After opening the file click on 'Attachment ->File', Select the file to be detached from list and click 'Detach File'.

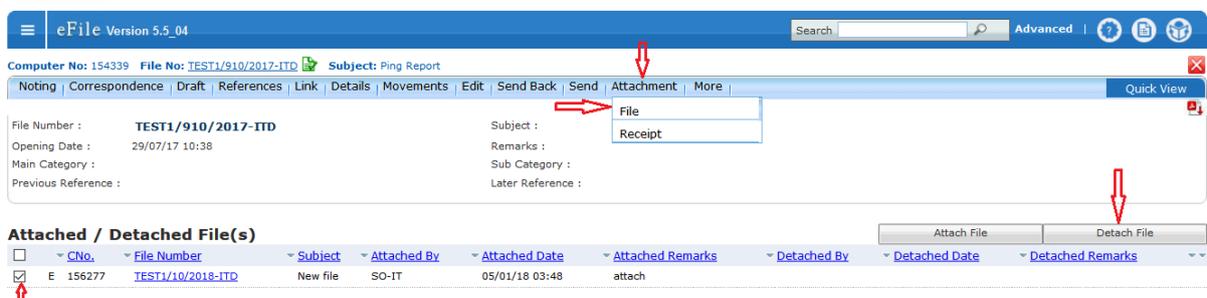


Fig.eFile.22

2. Give the remarks and click 'OK'. The detached file be stored back to inbox

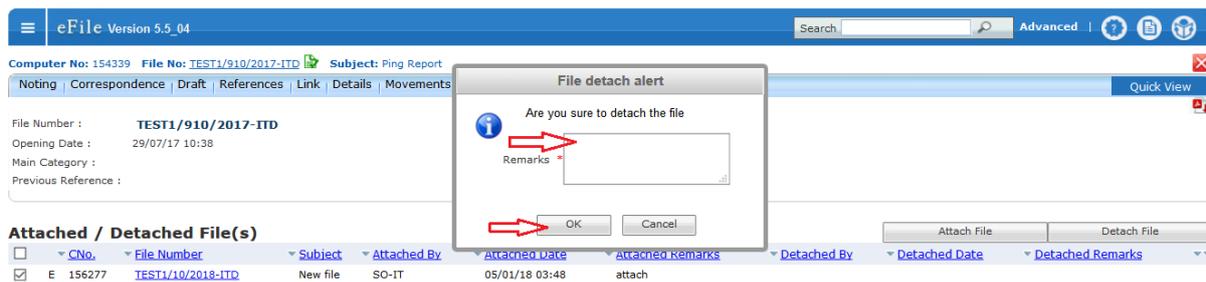


Fig.eFile.23

2.3 File Migration

File Migration is the process of converting the old physical files in to electronic files which can be processed in eOffice application. To Migrate file the user can perform the following steps.

Follow Step1 if doing file migration first time else follow step2.

1. Click on "**Folder Permission**" under "**Migrate File**" option in the eOffice main menu to set folder permission to the user in Document server of the eFile application to access the concerned old physical files which are scanned and stored in the server. Click on "**Save**" Button after choosing the department, section, name and file folder from the drop down list (Fig.eFile.24). After setting the folder permission (one time process) perform the following steps.

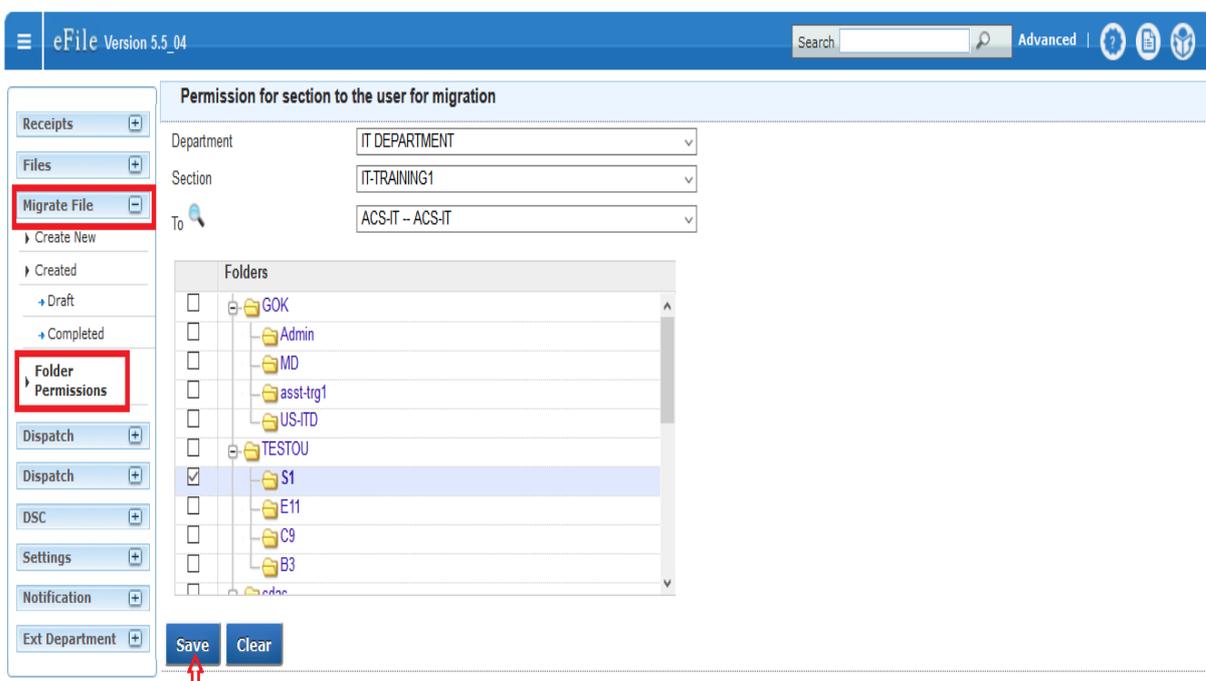


Fig.eFile.24

2. Select "**Create New**" option in "**Migrate File**" menu. Choose your seat number in the "File Number" option.

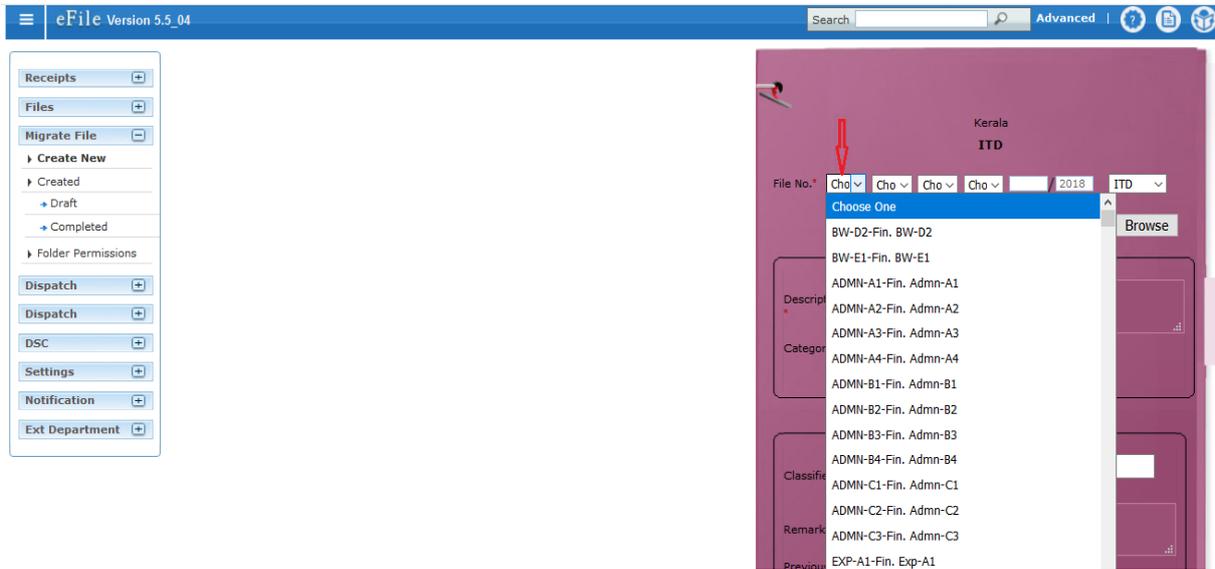


Fig.eFile.25

3. Click the "**Browse**" button to select the file for migration. Select the file from the list which is to be migrated. You can use the file search facility to search the file by providing the Physical file number in the "**Search**" box. Then click the "**Import**" button.

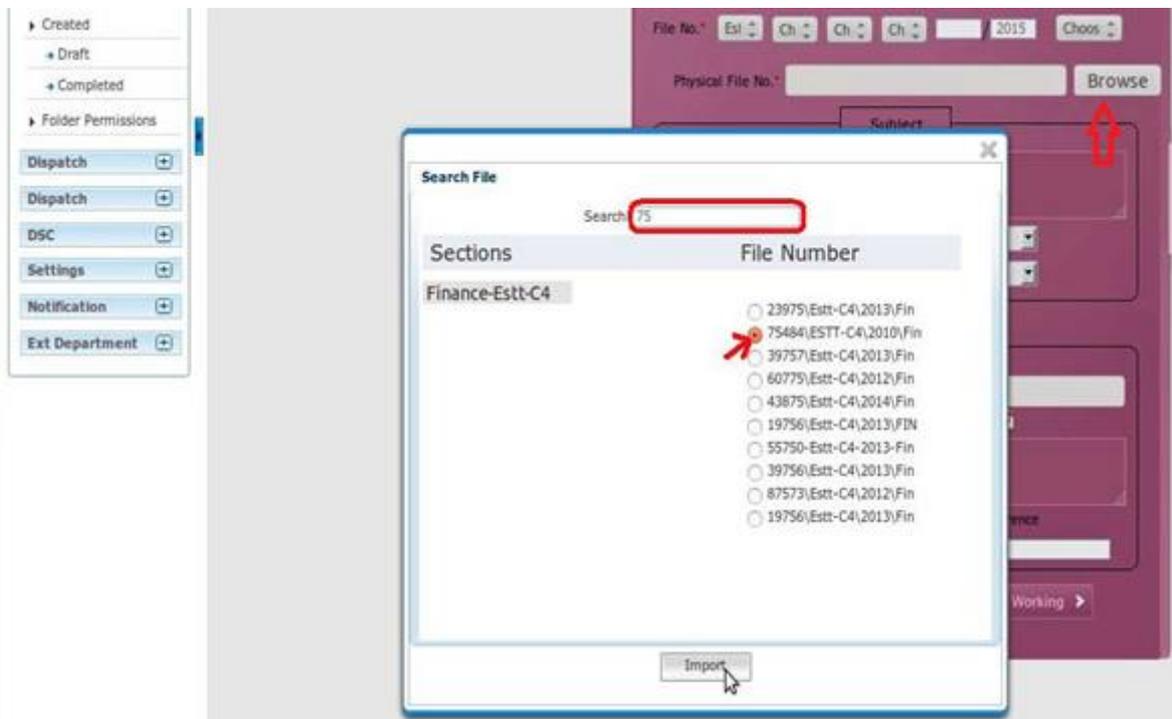


Fig.eFile.26

A new panel will appear on the left side showing 'source' on the upper side and 'Destination' on the lower side. Now we've to transfer the scanned documents from the source (Server) side to the Destination (efile) side. (Fig.eFile.27).

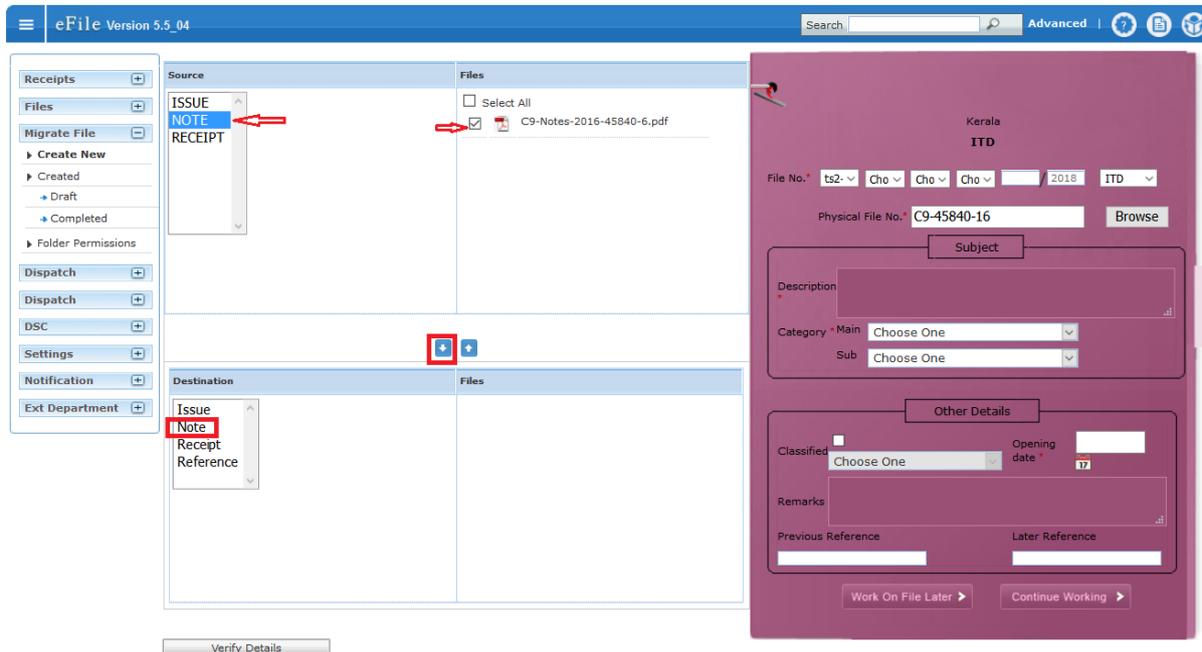


Fig.eFile.27

4. Click on the Notes folder in the Source Side and select all the scanned files. Click the 'Notes' folder in Destination side and click the Down arrow Symbol in the middle. Continue these steps for all the 'Receipts', 'Issues' and 'References' if any. Now enter the details of the file like 'Description', 'Category' and 'Opening Date'. Then click the 'Continue Working' button. As a result the following window appears.
5. Enter the metadata for the receipt and issues (Mandatory Fields should be filled) by clicking the 'Edit' icon corresponding to it as shown (Fig.eFile.28).

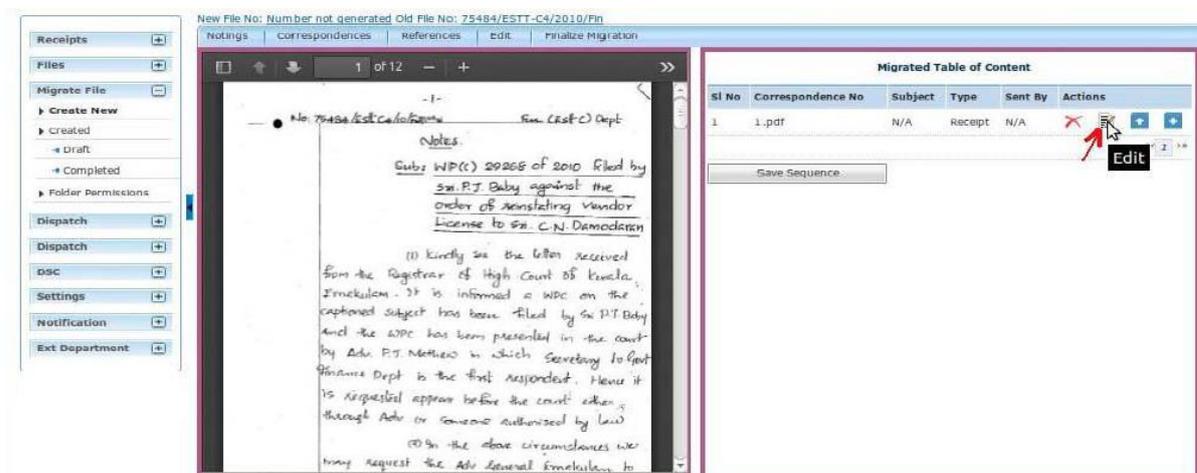


Fig.eFile.28

- After filling the Meta data, click the '**Generate**' button (Fig.eFile.29). After generating the receipts and issues click the '**Finalize migration**' option.

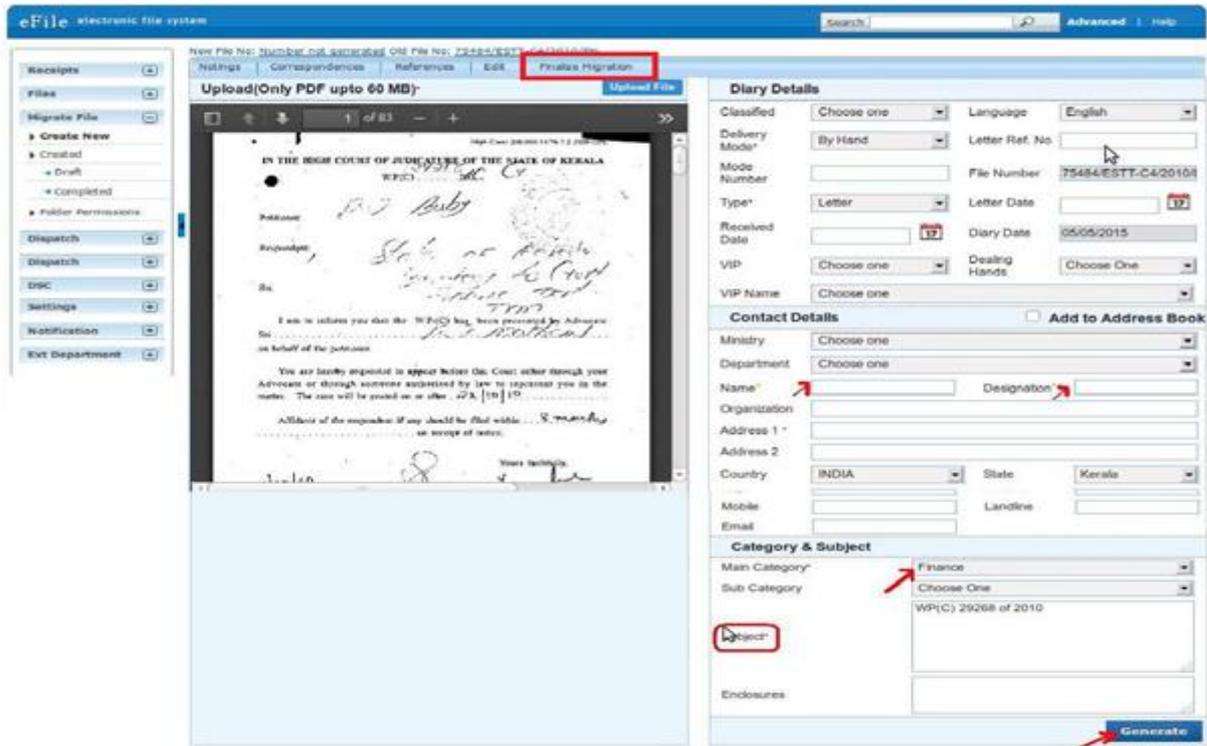


Fig.eFile.29

- Click the “OK” button in the Confirmation box that appears. Migrated file is created and the Migrated Notes will be shown as a link in the Noting side and the receipts will be shown in the correspondence side.

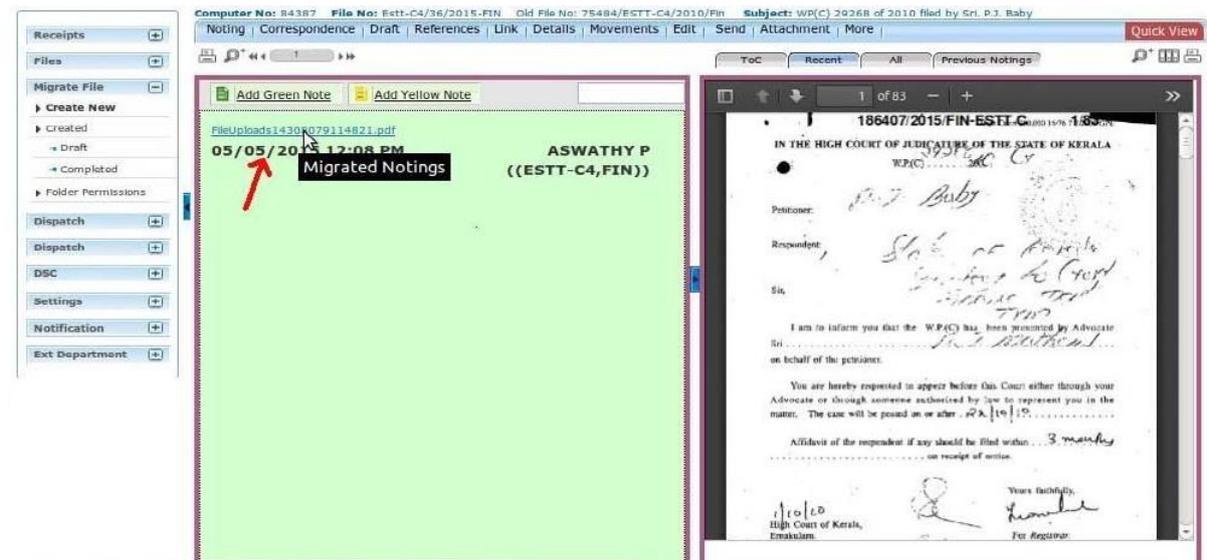


Fig.eFile.30

2.4 Other useful features available in eFile

There many other useful feature available with eFile. Few are explained bellow.

2.4.1 Searching and Tracking of Files/Receipts/Dispatch

By using “*Advanced*” search option the user can search all the files/Receipts/Dispatch which are all processed in eFile.

The screenshot shows the eFile search interface. At the top, there is a search bar with the word 'Advanced' highlighted in a red box. Below the search bar, there are three tabs: 'File', 'Receipt', and 'Dispatch'. The 'File' tab is selected. Under the 'File' tab, there are several input fields: 'Creation Year' (with '2018' entered), 'Origin' (set to 'Internal'), 'Nature' (set to 'All'), 'Physical Scope' (set to 'Section'), and 'Electronic Scope' (set to 'Section'). Below these fields, there are two sections: 'Basic Parameters' and 'Advance Parameters'. The 'Basic Parameters' section has input fields for 'Computer No.', 'File No.', and 'Subject'. The 'Advance Parameters' section has checkboxes for 'All Day(s)', 'Computer No.', 'File No.', 'Subject', 'Location', 'Opening Date', 'Currently With', 'Section', 'Department', 'Forward Remark', and 'Pending'. At the bottom of the form, there is a blue button labeled 'Search Files' which is highlighted with a red box.

Fig.eFile.31

The user can search the Files, Receipts, and Dispatch by using the tabs ‘File’, ‘Receipt’ and ‘Dispatch’ respectively.

By providing the ‘basic parameters’ like Computer No./File No./Receipt No./Dispatch No. or Subject the user can track the records.

User can also use ‘Advanced Parameter’ to search and track the records more precisely and effectively.

The screenshot shows the eFile search interface with the 'Advance Parameters' section highlighted in a red box. The 'File' tab is selected. The 'Creation Year' is set to '2018', 'Origin' is 'Internal', 'Nature' is 'All', 'Physical Scope' is 'Section', and 'Electronic Scope' is 'Section'. The 'Basic Parameters' section has input fields for 'Computer No.', 'File No.', and 'Subject'. The 'Advance Parameters' section has dropdown menus for 'Category', 'Sub Category', 'Classified', 'Old Phy File No.', 'File Heads', 'Select Basic Head', 'Select Primary Head', 'Select Secondary Head', and 'Select Tertiary Head'. There are also input fields for 'Previous Reference', 'Later Reference', 'Creation Date', 'Date', 'Remarks', and 'Action'. At the bottom of the form, there is a blue button labeled 'Search Files'.

Fig.eFile.32

2.4.2 Parking

The user can park the file using the park feature of eFile system. Parked link contains a list of all the Files that are temporary closed and work will be done later stage. Pendency of file will be removed if any file is parked. Parked files can be made active at any point of time.

The files received in 'Inbox' can be parked by performing the following steps.

1. Open the file form the 'Inbox' by clicking on file number.
2. Click on the '**Park File**' option in the '**More**' link, as a result a parking confirmation window appears
3. Provide the **Parking due date** and **Parking Remarks** and Click '**OK**' Button.

The parked file will be listed in '**Parked**' folder of the Main menu '**Files**'.

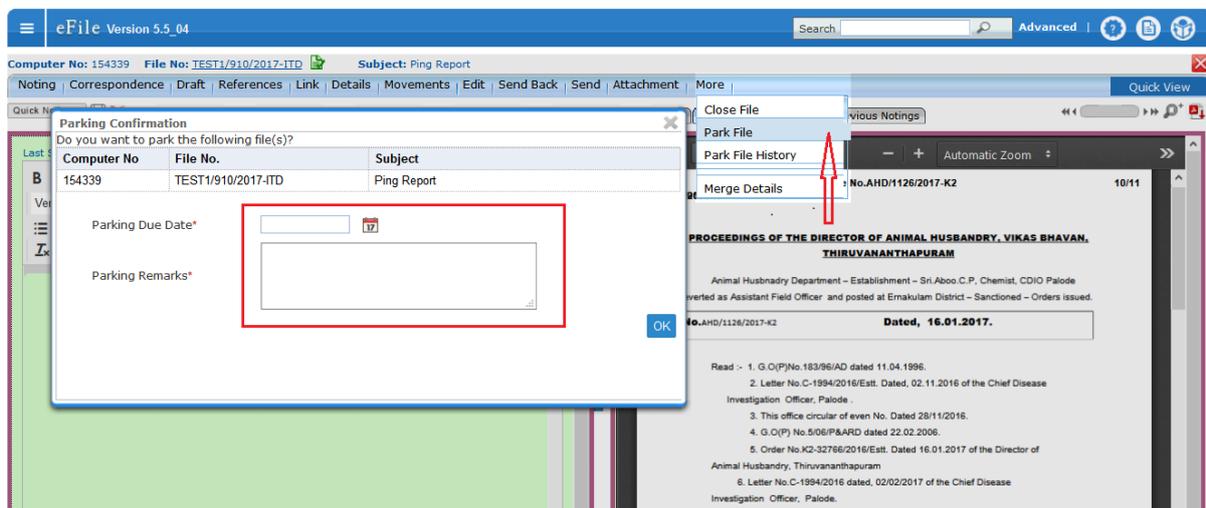


Fig.eFile.33

The Parked files can be un parked



Fig.eFile.34

2.4.3 Pull Up

The pull up operation can be performed on both the Files and Receipts of other user's (in same section/in just one hierarchy down).

In case of **Files** this action can be performed on files which are there in other user's *inbox/parked/personal folder created under inbox*.

In case of **Receipts** this action can be performed on receipts which are there in other user's *inbox/ personal folder created under inbox*.

In order to pull up a file/receipt, a user needs to select a source user from the **Hierarchical View**. By clicking on the hierarchical View list, the user can select the name of concerned employee from whom the file/receipt is to be pulled up and also to see the list of files to be pulled up.

Once the file (which is being pulled up) has been located, by using the **Pull up link/icon (pull)** the user can Pull Up the file by providing Pull up reason in the remarks window. (Fig.eFile.35).

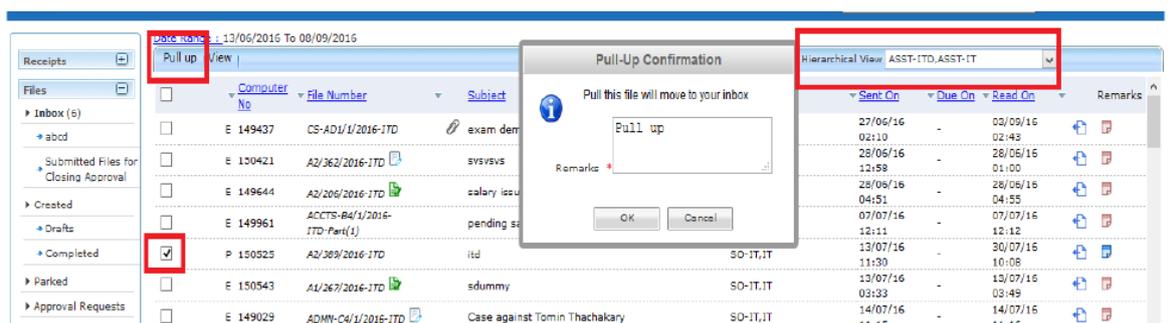


Fig.eFile.35

As a result the pulled up file/receipt will be available now in file's/receipt's inbox of the user.

2.5 DSC (Digital Signature Certificate)

A Digital Signature Certificate that has the same legal recognition and validity as handwritten signatures which implies a process of demonstrating the authenticity of a digital message or document.

eOffice user has to get a digital signature (optional) in USB token from any of the certifying authorities like Sify SafeScript, e-Mudhra, or (n)Code. For using the DSC token the user has to register the DSC (one time process) using the option **DSC Registration** under DSC section. To register a new DSC '**Signing Certificate**' link is used. The registered DSC information will be listed as shown in (Fig.eFile.36).

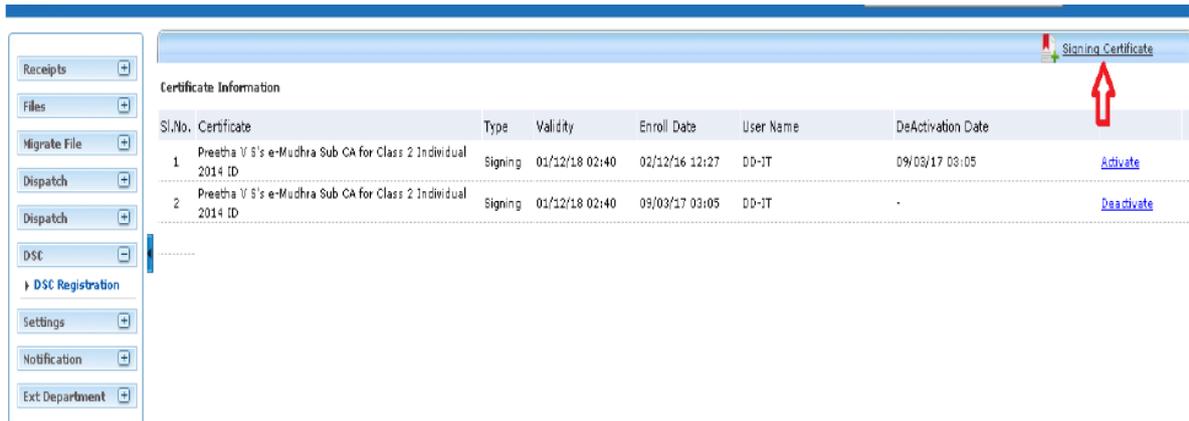


Fig.eFile.36

Note: User has to properly install drivers and the Java Packages for the DSC USB Token in the system before registration.

3. Validating Digital Signature

If the Digital Signature is showing as a question mark with unknown validity, right click the signature and Select "Validate Signature" and perform the following steps.

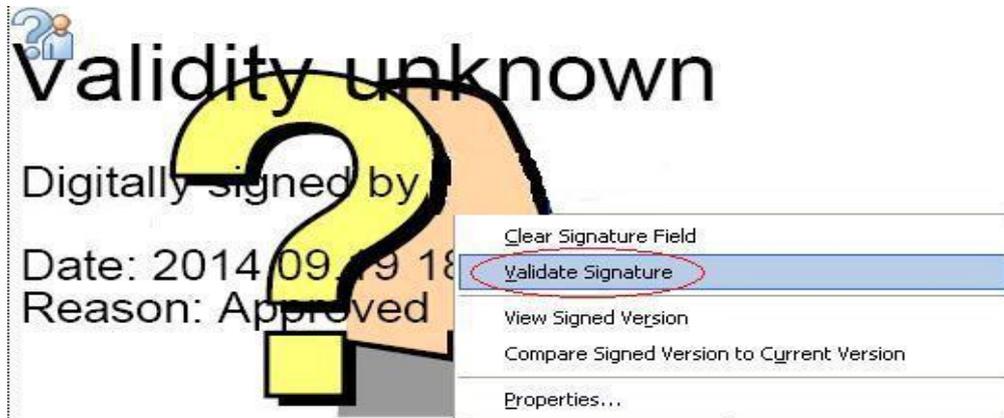


Fig.eFile.37

1. Click on "legal notice" from the new window

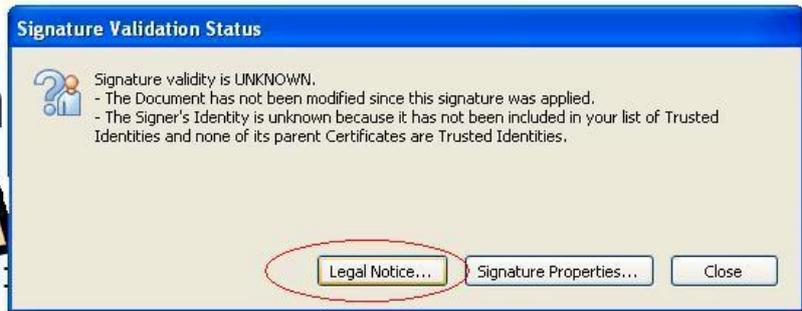


Fig.eFile.38

2. Select "Signer legal notice"

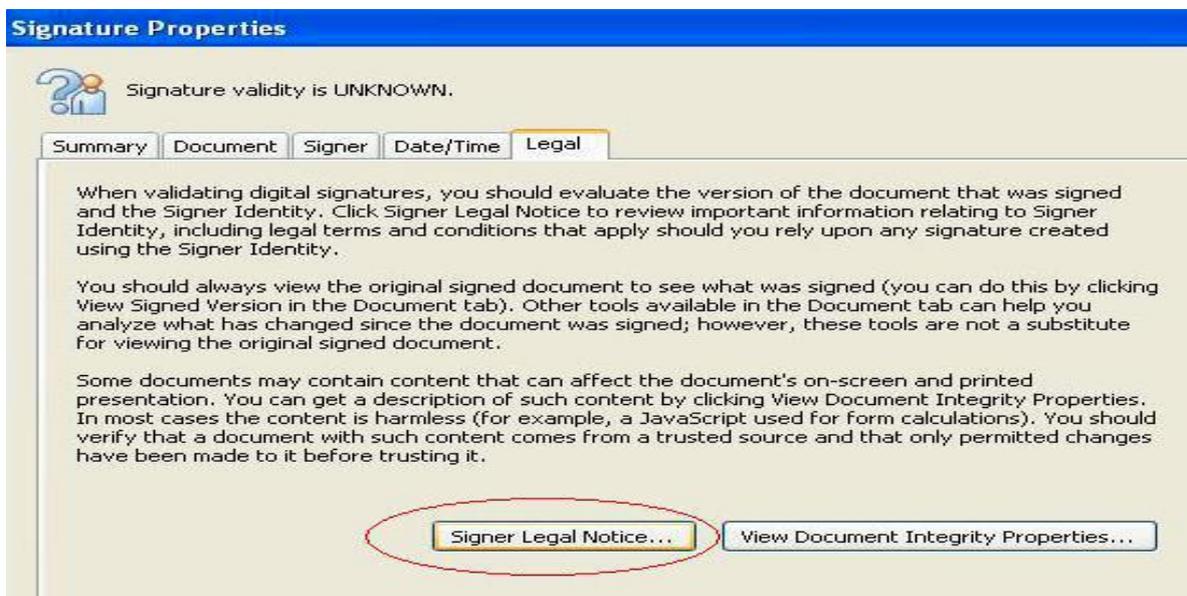


Fig.eFile.39

3. Select The tab "Trust"

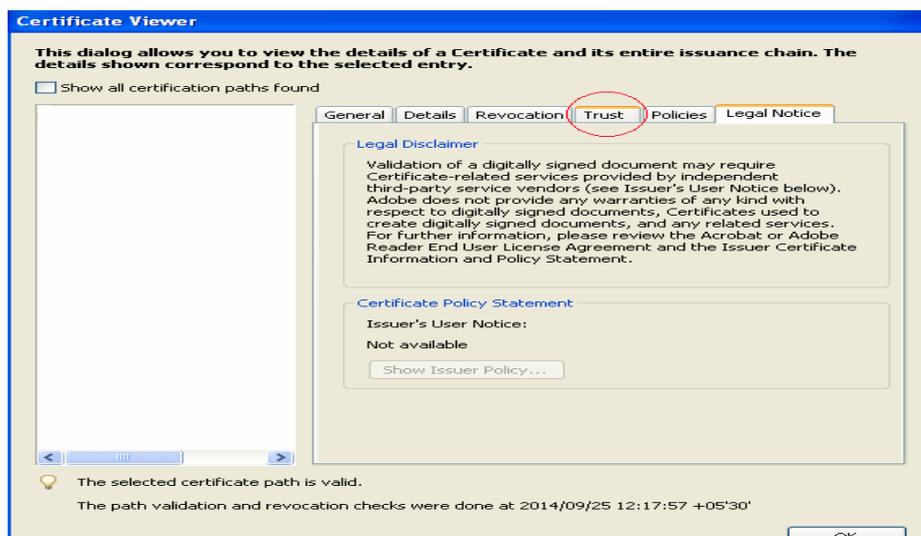


Fig.eFile.40

4. Click "Add to Trusted Identities" and press OK

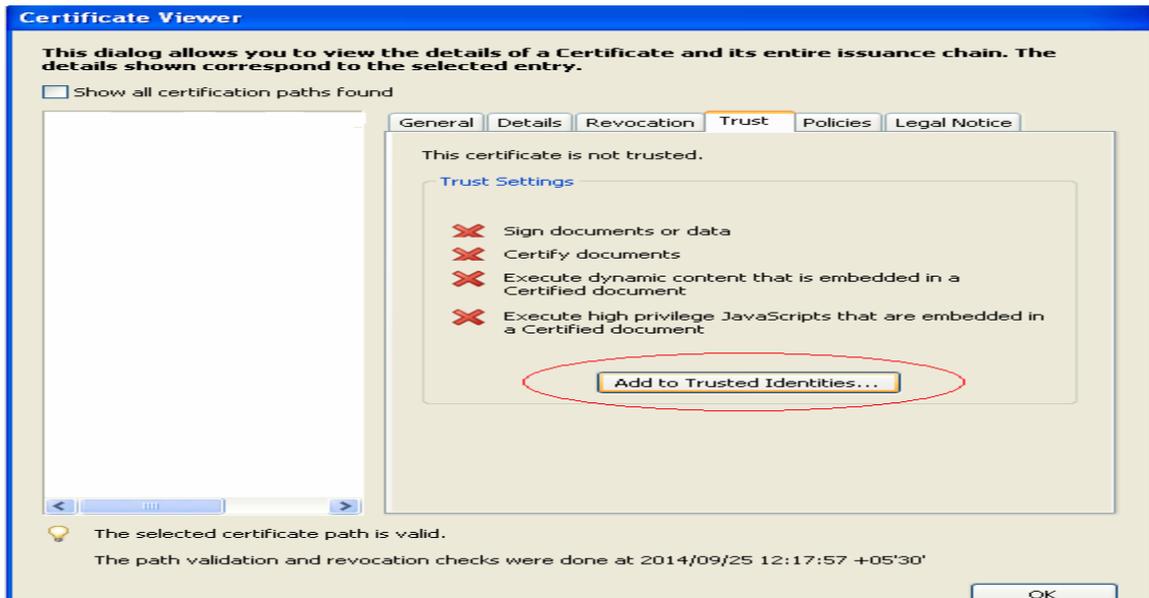


Fig.eFile.41

2. Select "Verify Signature"

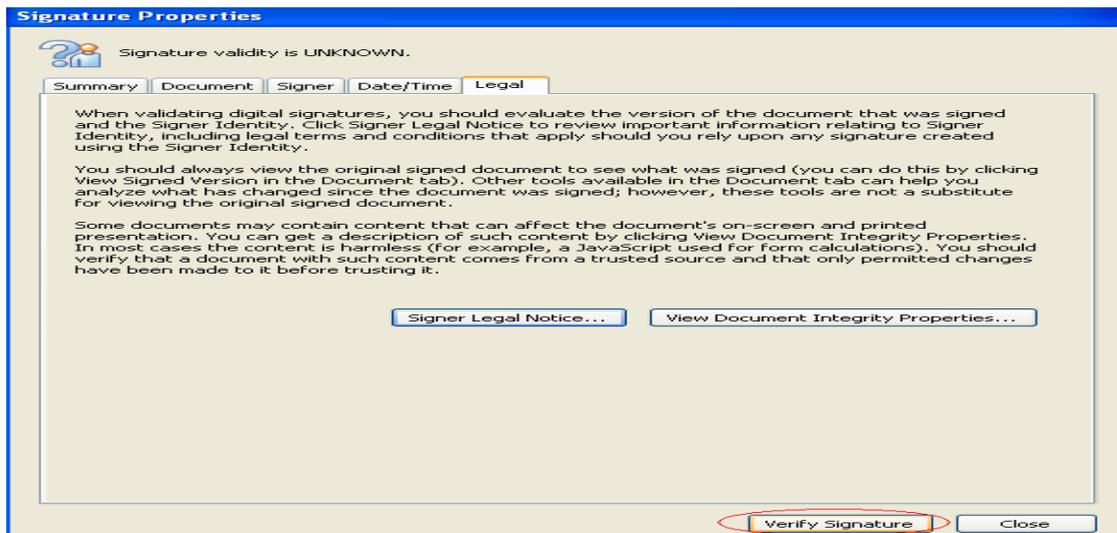


Fig.eFile.42

3. Now this signature is Valid



Fig.eFile.43

4. Clearing of Java Cache

Clearing of Java Cache will enable the user to put digital signature without any time delay.

Linux/Ubuntu System

Open the terminal window by pressing alt+Control+T keys together on keyboard then Type the command “jcontrol”. As result the java control panel window appears. Now click on Settings.

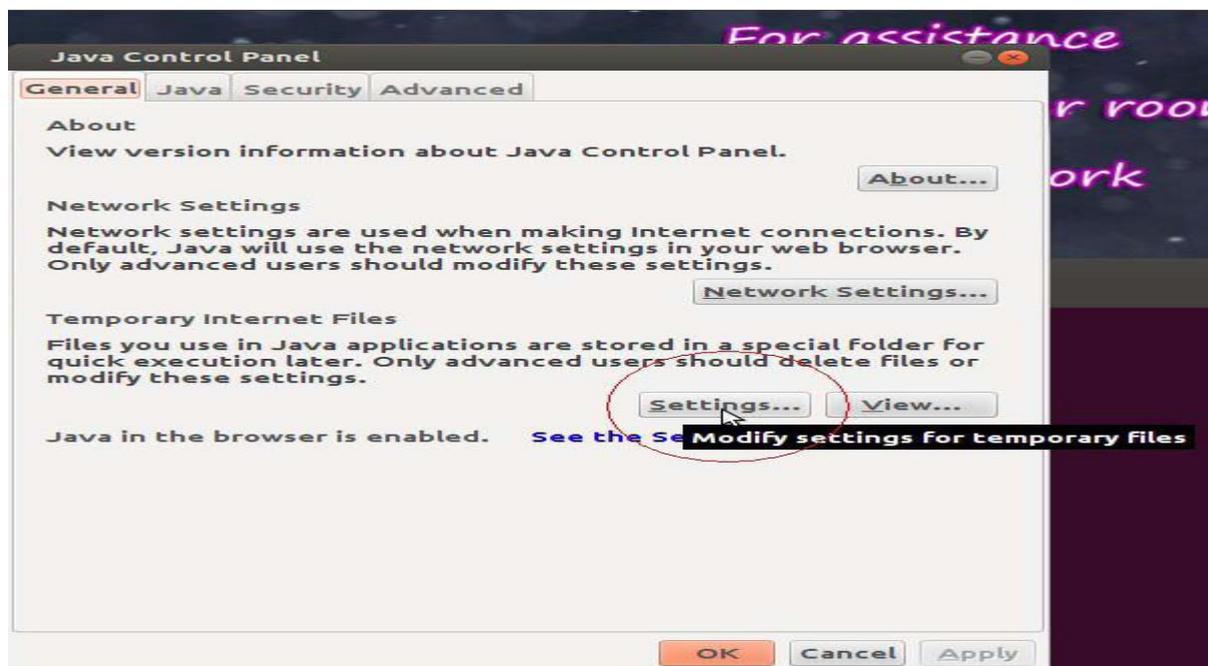


Fig.eFile.44

1. Click “Delete Files”

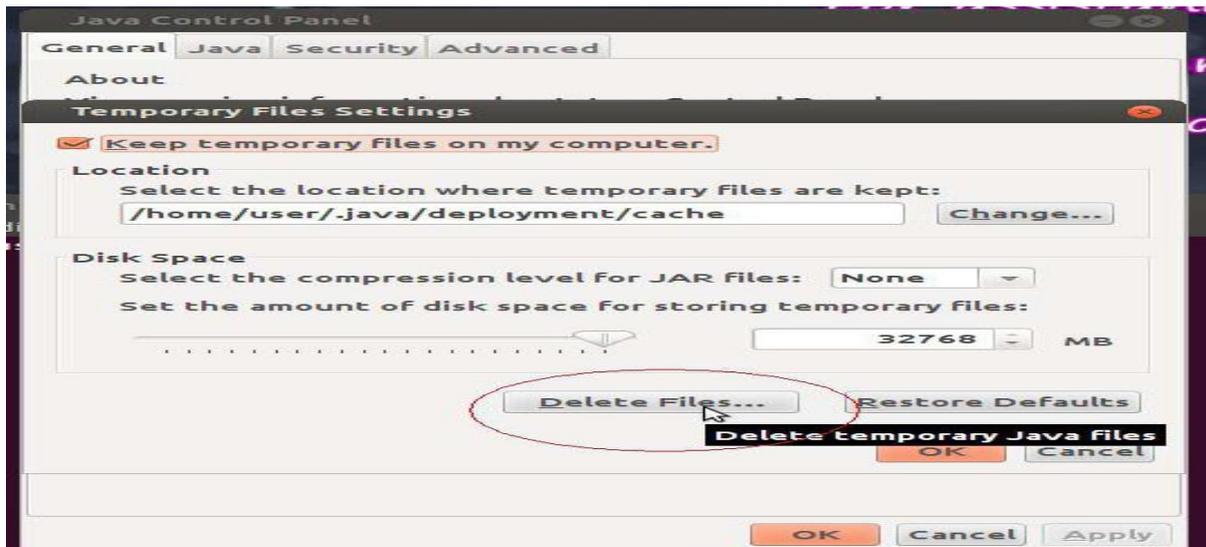


Fig.eFile.45

2. Click OK

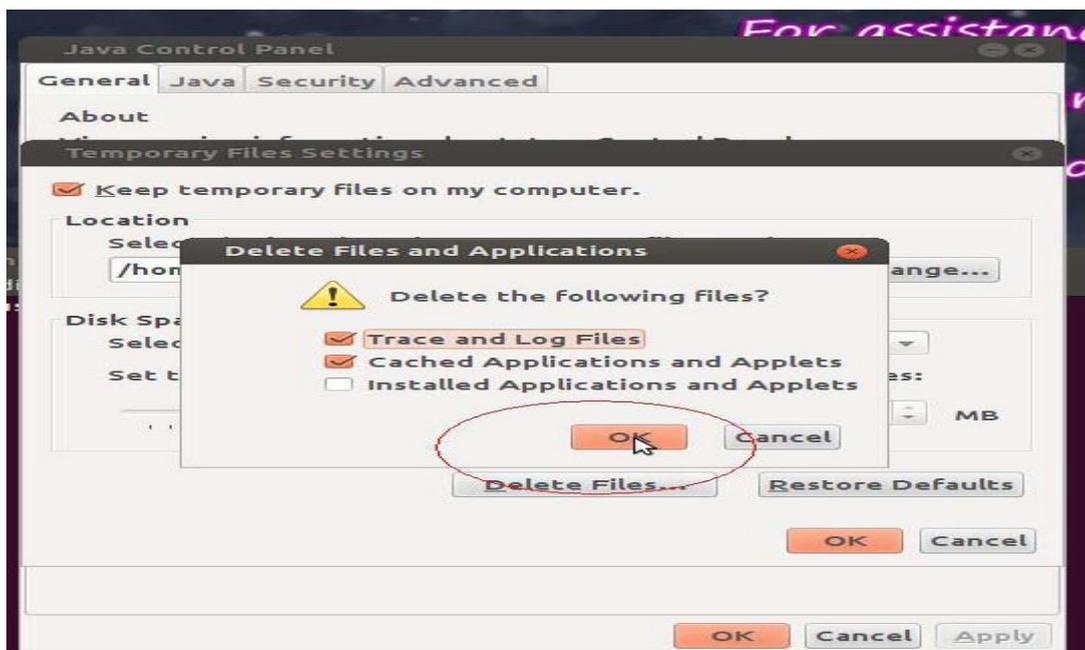


Fig.eFile.46

Windows System

Open **Java** from the Control Panel Window by performing following steps.

Select **run** from the start menu or press **Windows key+R** on the keyboard. Type “control” command and click OK.

1. Click on settings

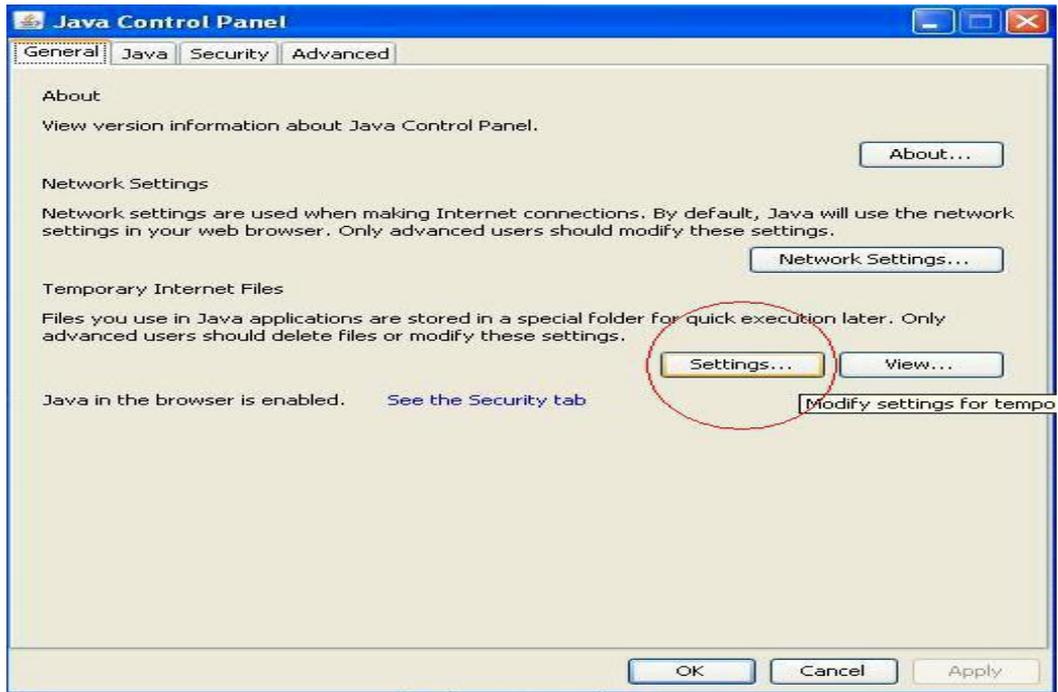


Fig.eFile.47

2. Click on Delete files

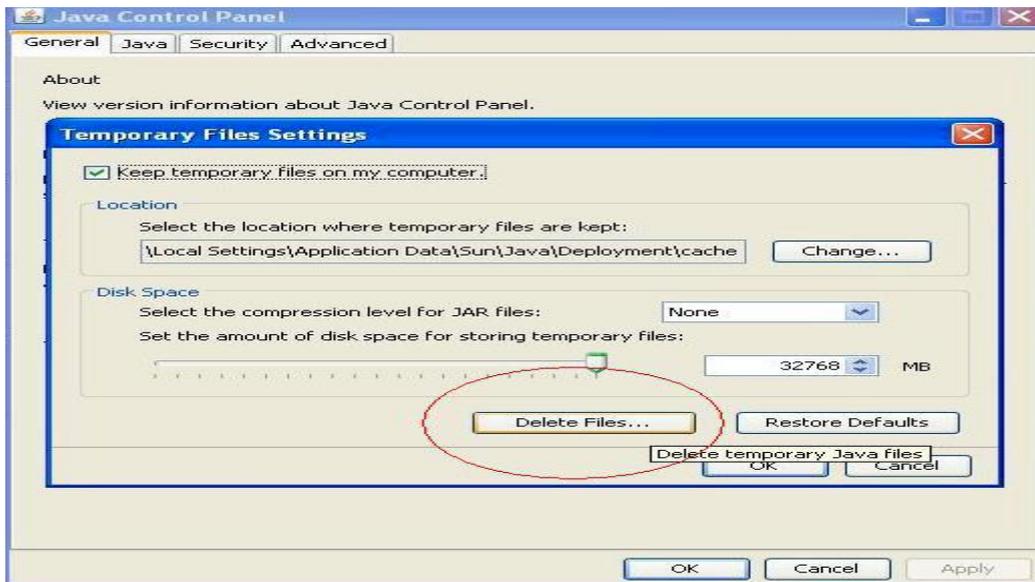


Fig.eFile.48

3. Now press OK

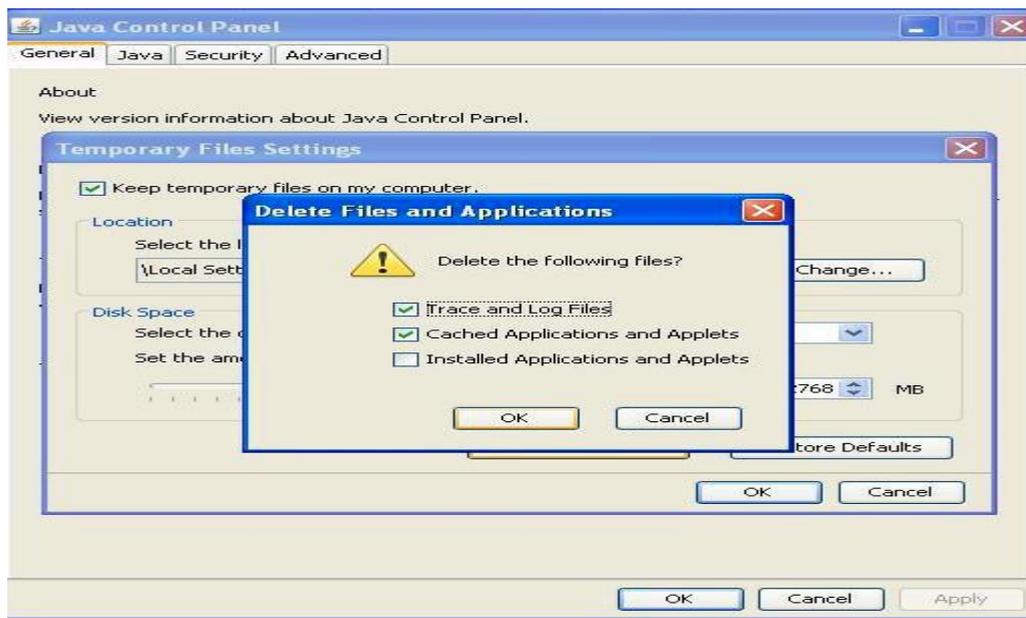


Fig.eFile.49

5. eFile MIS Report

eFile MIS Report is a new module added in eOffice application; can be used to generate various kinds of reports for decision making. This module include MIS reports like Personal Register (PR) of an employee, Monthly business statements, pendency report, GO registers, Dispatch registers etc.

This module can be accessed by clicking on the link ‘eFile MIS Report’ in the home page of the eOffice application.



Fig.eFile.50