MIGRATION PROCESS

(In eOffice)

Introduction

The Physical/manual files can be converted into electronic files by using **MIGRATION PROCESS**. There are 3 cases of files:

a) Current Files:

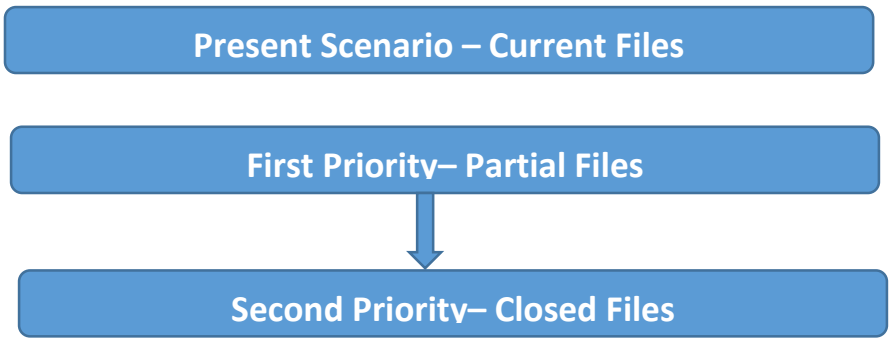
Current files are the fresh files which is going to be created as electronic files in eOffice.
i.e. Electronic file is created for new PUC. In this case, no manual files is need to be created.

b) Partial Files:

Current PUC's are entertain in electronic files in eoffice & their Manual (Physical/Old) files is maintained for Old Record. In this case, migrate the Old File to eFile and link it with already created electronic file.

c) Closed Files:

Files which are closed or no further action has to be taken are known as Closed Files. User can also migrate the closed files in eoffice.



To migrate old files user has to follow some steps at initial stage:

Step 1: Identification of files: Identify the files branch wise so that selected files can be migrated on eoffice.

Step 2: Scanning guidelines: When manual files are identified then next step is to scan the noting and receipts of files. Following are some scanning guidelines:

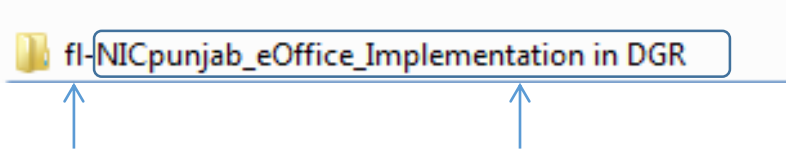
- Pages are uploaded according to the quality of paper i.e dots per inch (dpi) so adjust the scale resolution as 150 or 200dpi

- Scan each PUC separately by renaming it, but can scan single noting PDF.
- Unnecessary increase of paper dpi is not good and leads to large image.
- Choose Grayscale option.
- Choose option **Searchable PDF** while scanning process. In Searchable PDF, user is able to copy the content of pdf.

Step 3: Scanning Process and Folder Structure

- Create a **1st** Folder on Desktop i.e eoffice (any)

- Create **2nd** folder inside the eoffice folder. Rename the 2nd folder in below mentioned format:



Note: **Folder name must start with fl-then Manual File Number.**

NOTE: This is the Manual File Number (it should be separated by underscores not in slashes). Also don't use spaces, can use hyphen (-) in place of

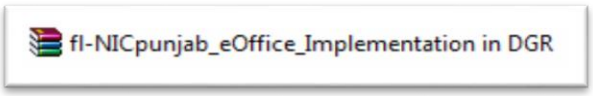
- Create **two folders inside 2nd** folder and name as :
  a) note **b) receipt**

- Create **single** PDF **of Noting side** & scanning of PUC (**Correspondence side**) separately and put these noting & PUC's pdf's in the above mentioned respective folders.

- It is necessary to rename &add noting keyword NP & CP after subject name so that user come to know which is noting pdf and receipt pdf. So rename these two pdf's.

- For example, Rename the noting pdf as : **Implementation project in DGR – NP**
  For example, Rename the each receipt PDF as: **Implementation project in DGR – CP and so on**

- Back to **2nd** folder and make its **compressed file (not WINRAR files)**

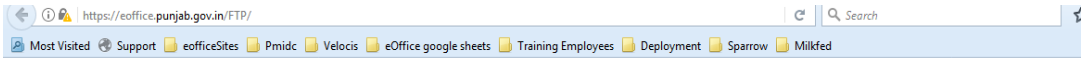


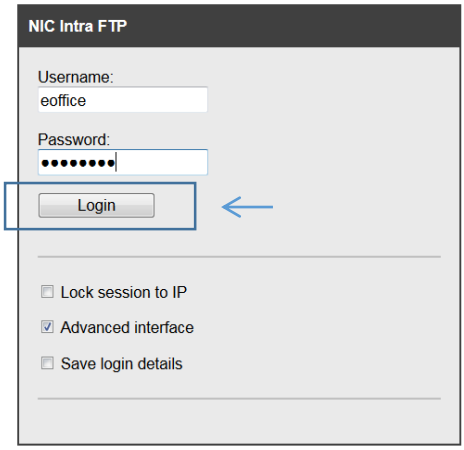
Note: User can follow the same structure to all manual files which is going to be migrate on eoffice. User can again create folder fl-second_file_DGR as mentioned above format & put single pdf of noting and single pdf of receipts in the inside folders.

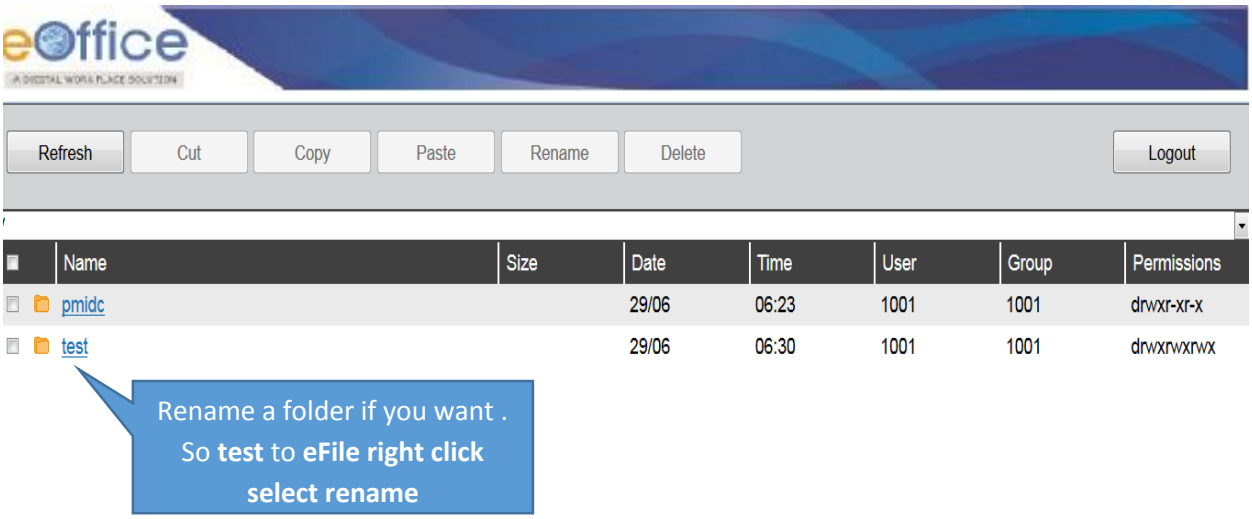
Step 4: FTP Access and Uploading of scanned PDF's

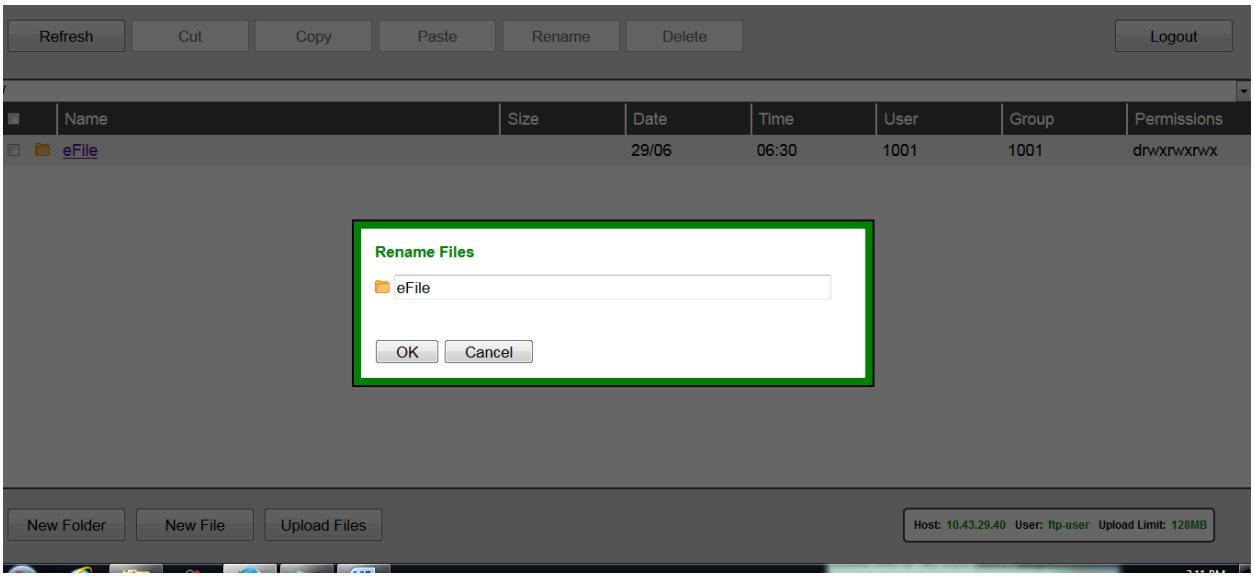
After creating folder structure and scanning process, login to FTP by using url ***eoffice.punjab.gov.in/FTP***. The credentials of FTP is:

- UserID is **ftp-user**
- Password is **Admin@123**
- Press **Login** to FTP





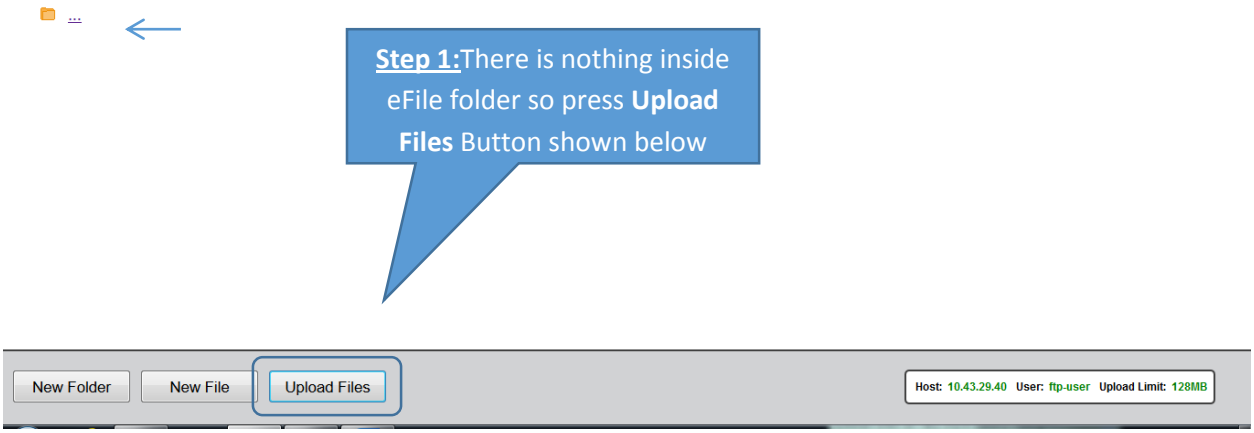




Press **Ok** . **Now we have to open the compressed file which is placed in our system.**

Click on FTP folder we have created just now i.e eFile

eFile->Click **Upload Files**-> select compressed file from system



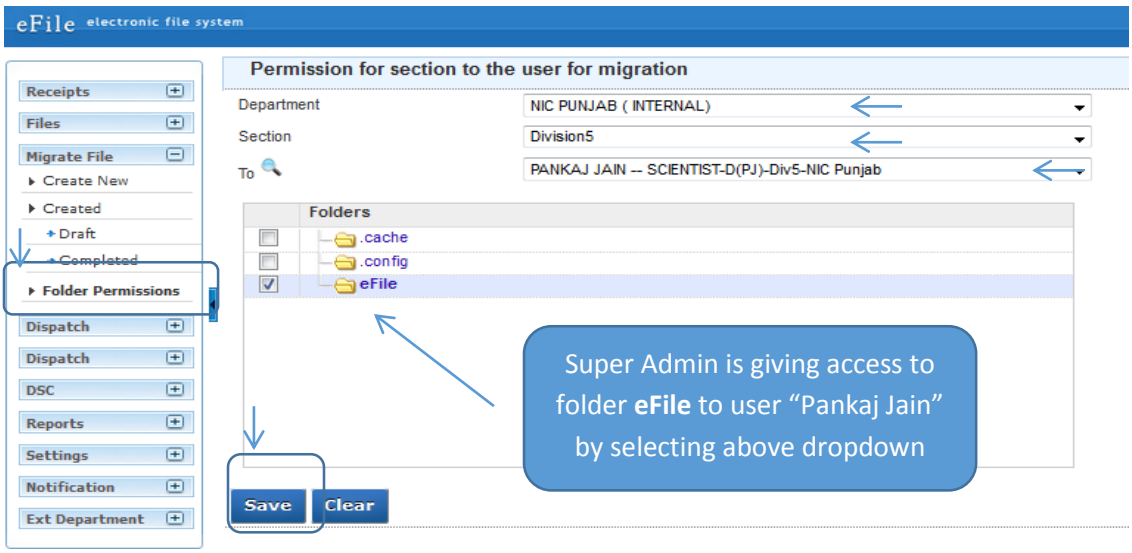
User must upload the files to their respective district folder only. Don't upload files in the other folder. If you are not able to access any folder then super admin will give you folder access persmission.

NOTE: Folder Permission must be given by super admin by logging in eoffice account.

Step 4: Super Admin give Folder Permission:

Super admin can login and go to **Migration Module** and follow the below mentioned steps:

Migration->Folder Permissions-> select Department ->select folder i.e eFile

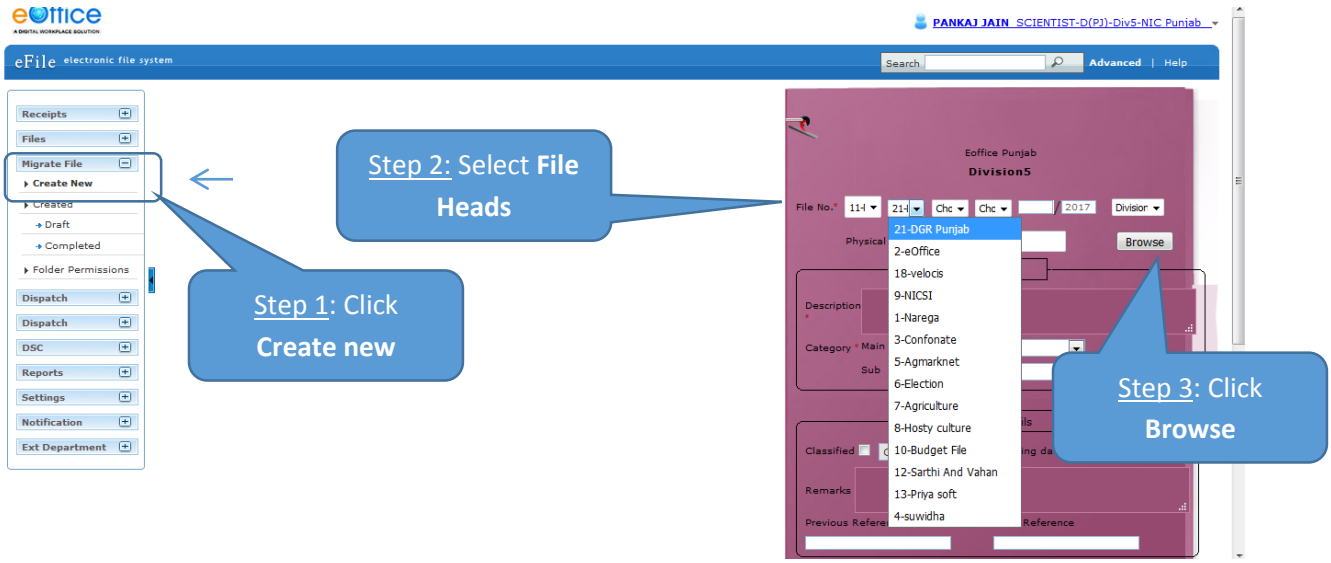


Now, permissions for folder **eFile** has been given by super admin and user can start migration process i.e migrating old files to electronic files.]

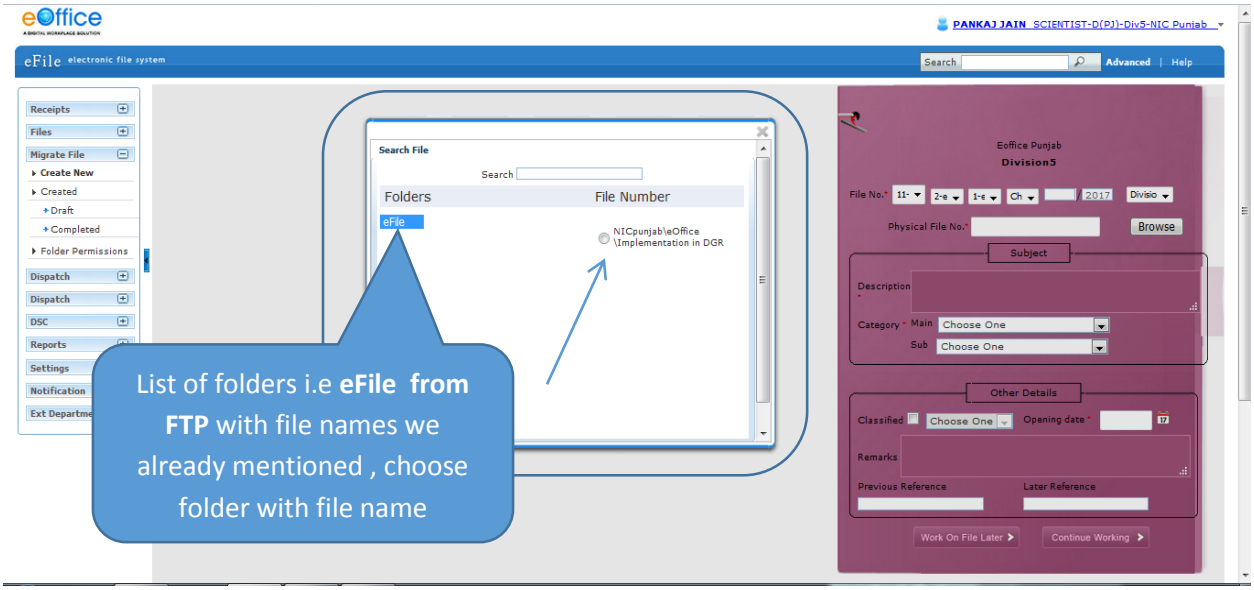
Step 5: Migrating Old files into eOffice account

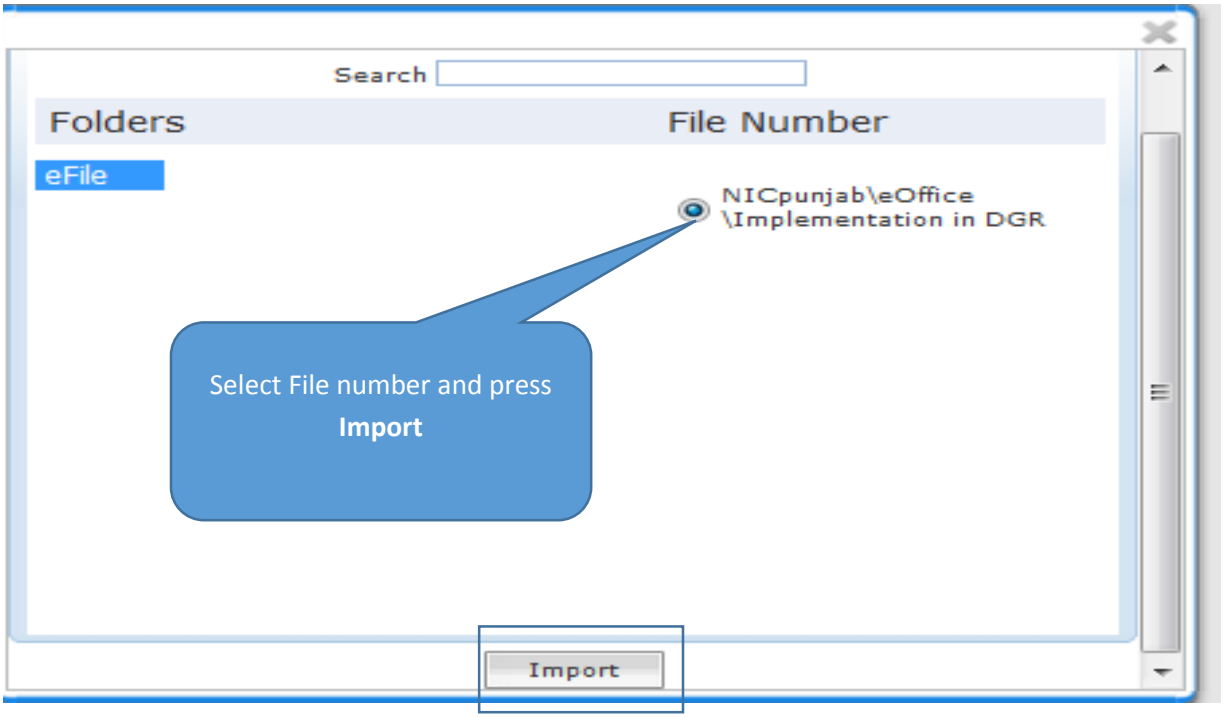
Login to user account in eoffice and go to **Migration File -> Create new**

➔ Choose file heads to create new file

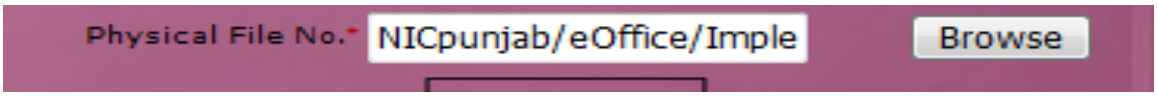


After pressing Browse option , list will open showing folders with file numbers, select file number and press **Import button.**

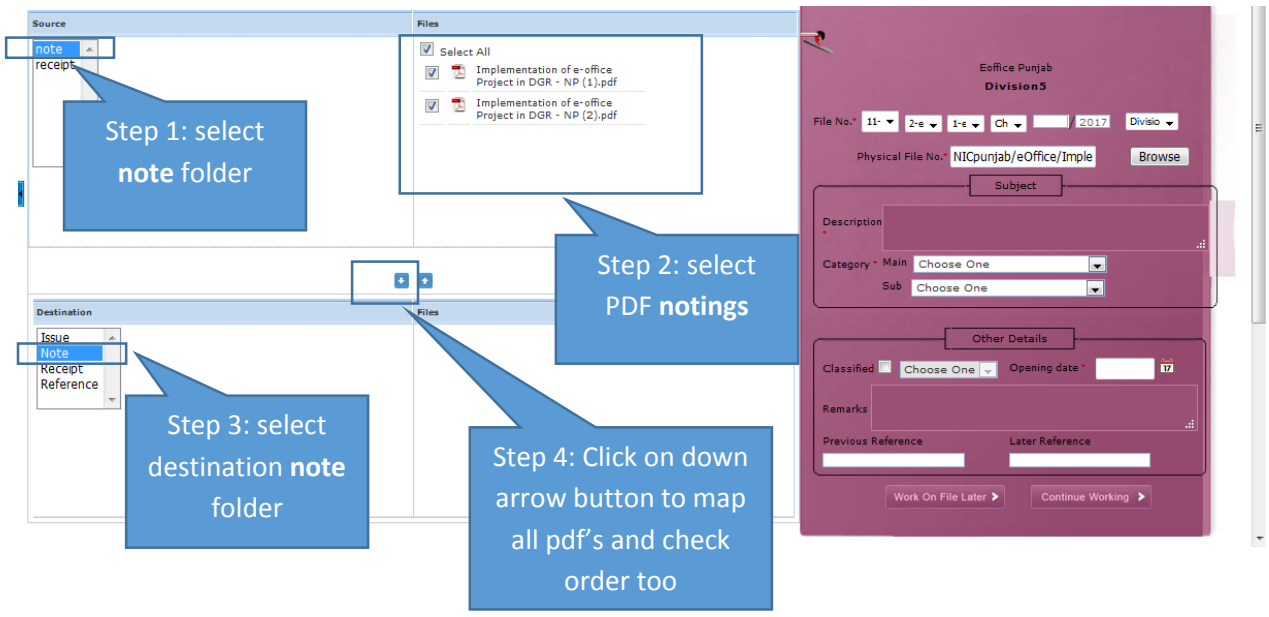




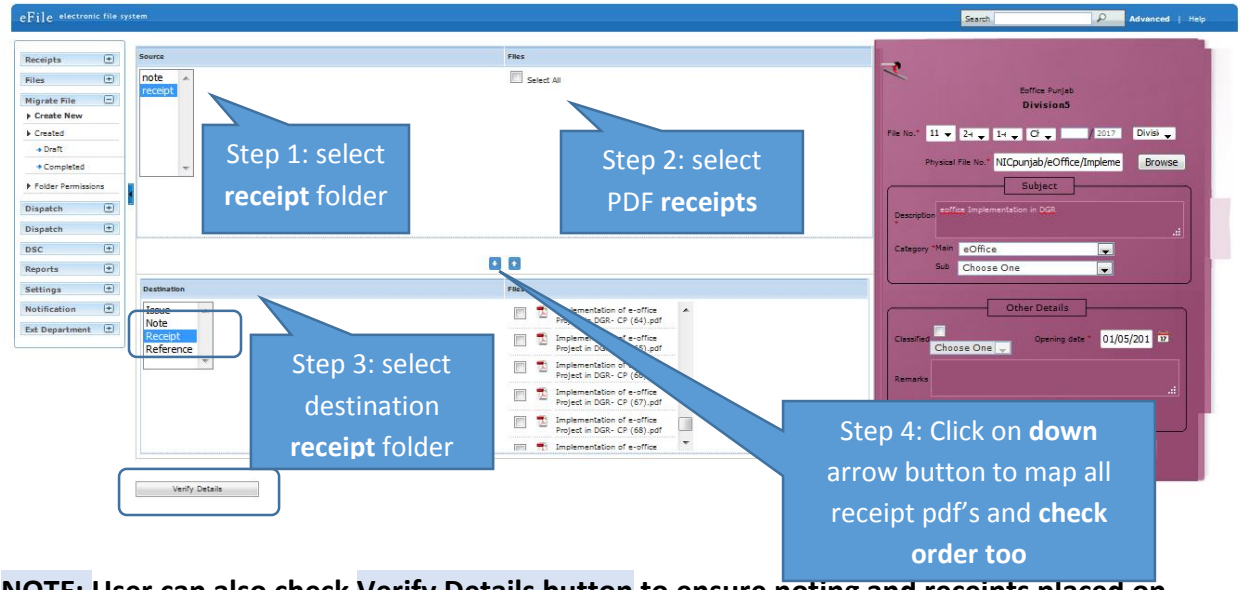
After clicking import button Physical file number will be shown as below:



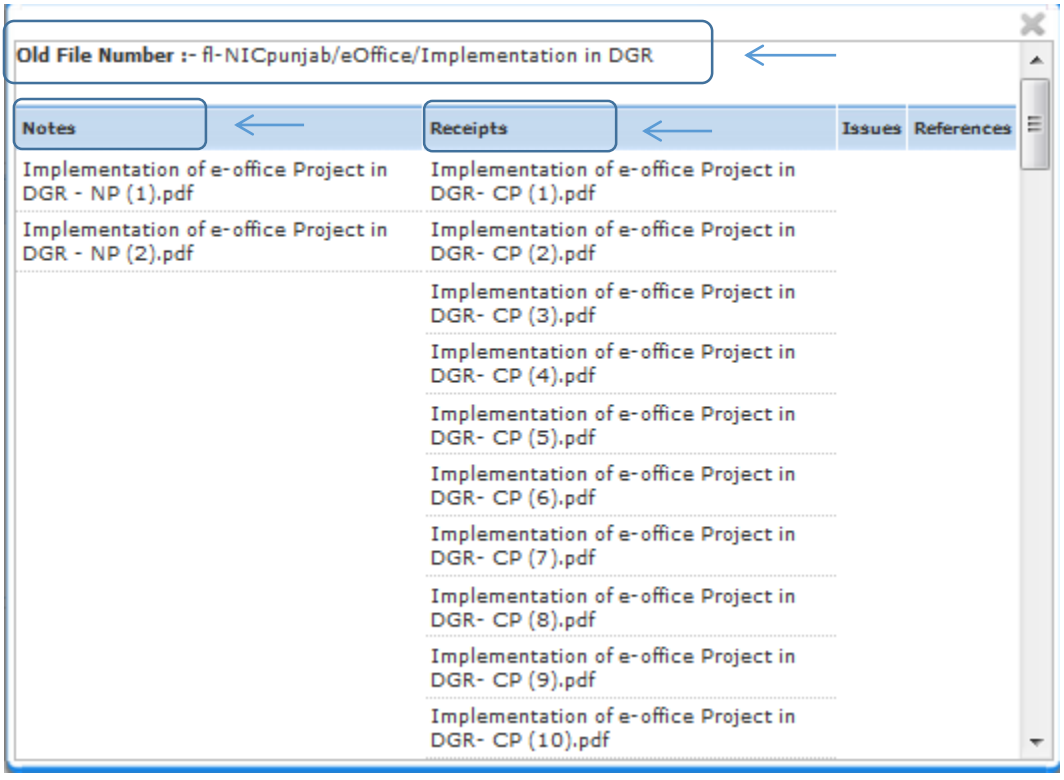
Next step is to select note and receipts and map with the arrow button highlighted below:



Same is to do with receipts mapping:



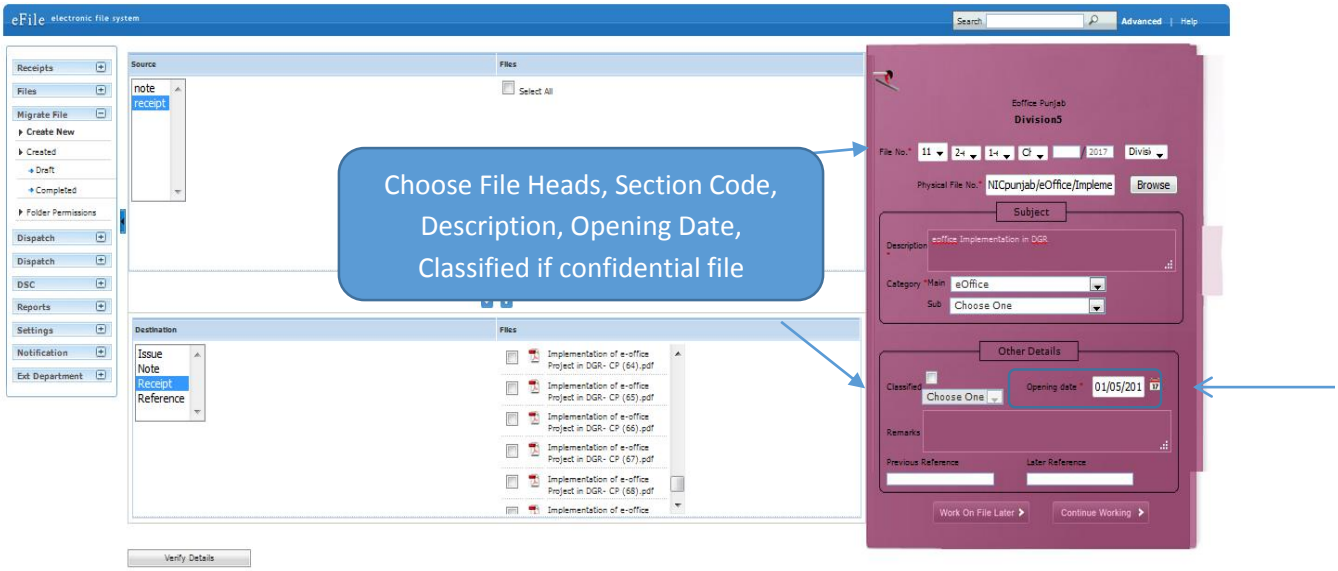
NOTE: User can also check Verify Details button to ensure noting and receipts placed on correct destinations. If user found that sequence is not correct then user can send back pdf to correct source folder whether it is receipt or note by using up arrow map button



After verifying pdfs and its sequence orders , click on cross button placed on left corner and come back to file cover screen. **Add opening Date, Description on file cover** . Cross check all

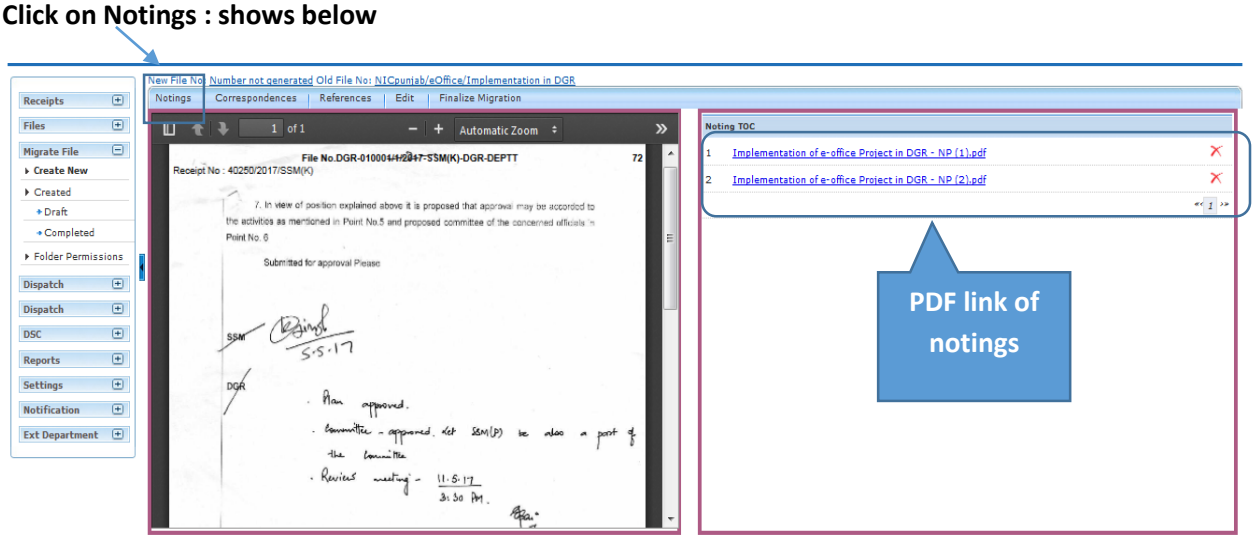
the details on file cover and press **Continue Working** to create file. User can choose whether it is confidential file by clicking on classified check box

Now file look likes as shown below:

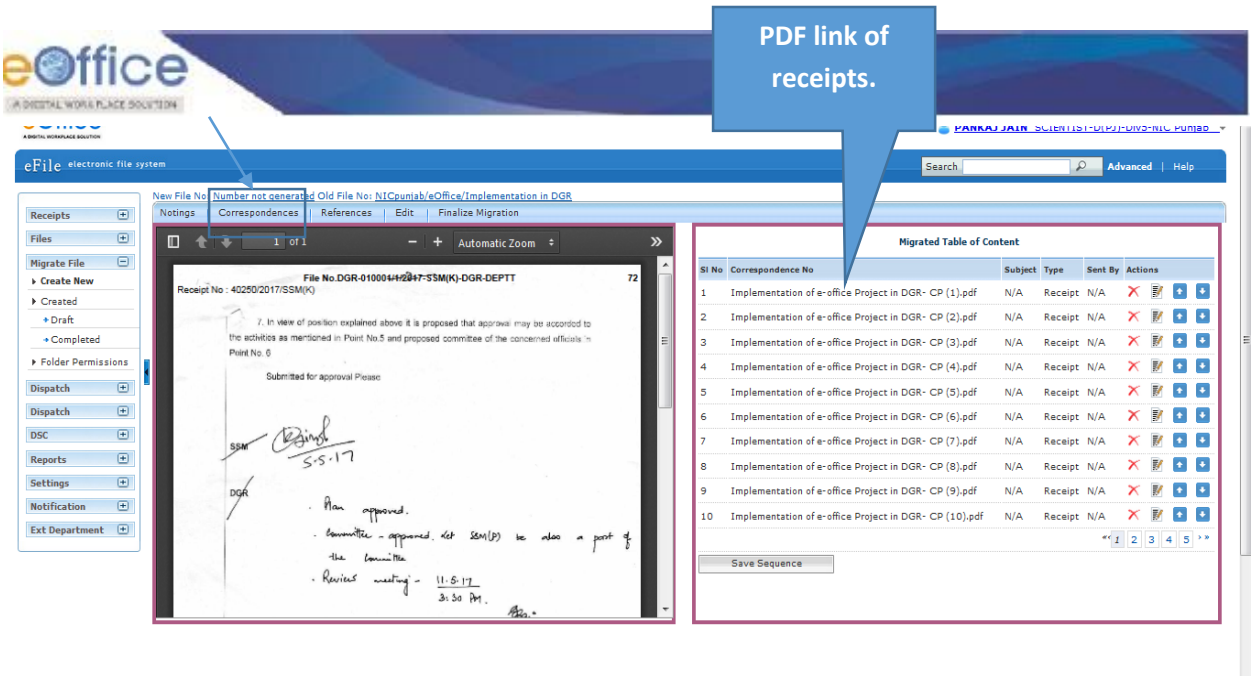


Press **Continue Working** if details are confirmed otherwise press **work on later** When user click on Continue button following screen will open up.

Click on Notings : shows below



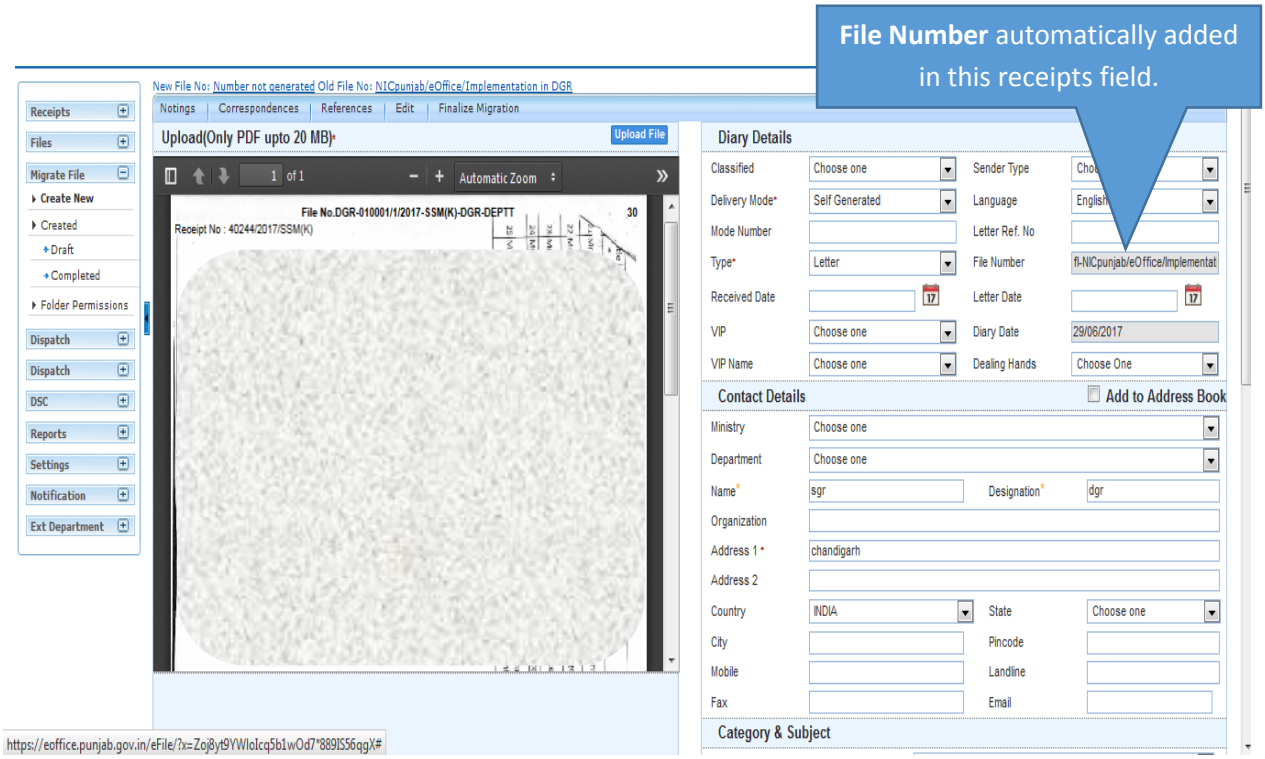
Click on Correspondences:



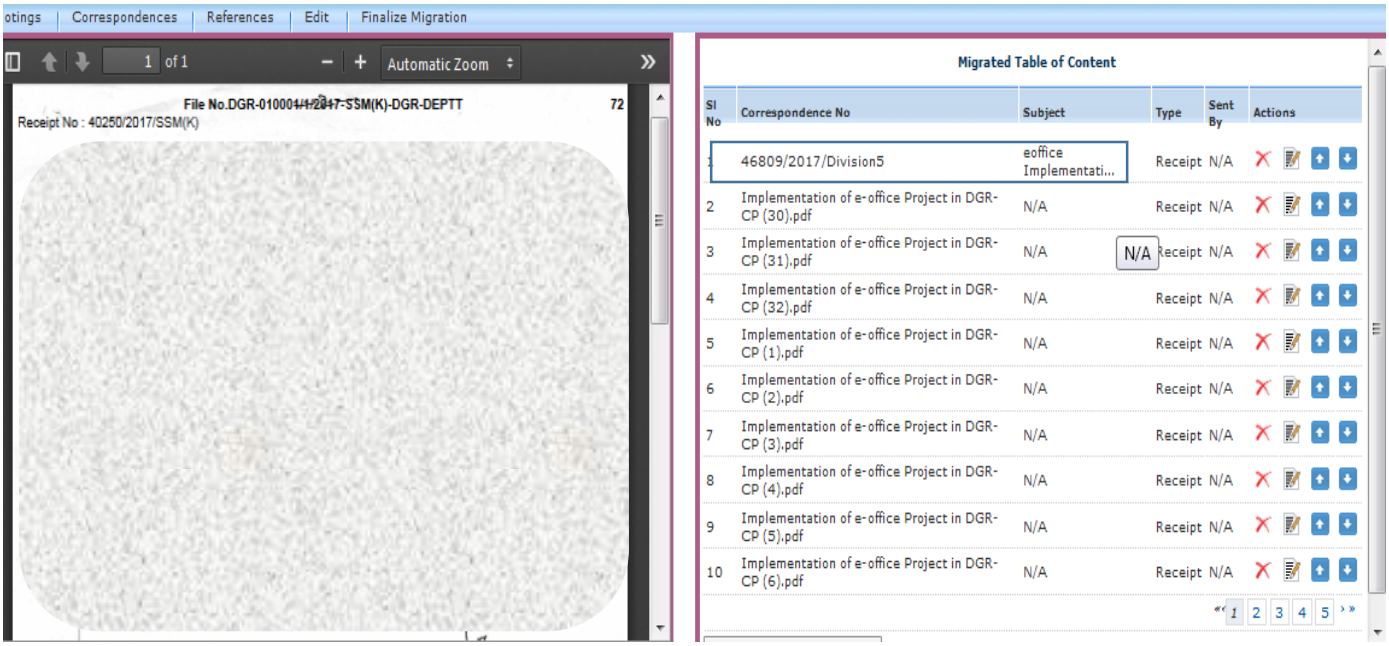
Correspondences attached on the right side with options **delete, edit and set sequence order** buttons. User have to edit each correspondence receipt so that meta data can be filled.

NOTE: You have to first fill metadata for all receipts before doing finalization migration.

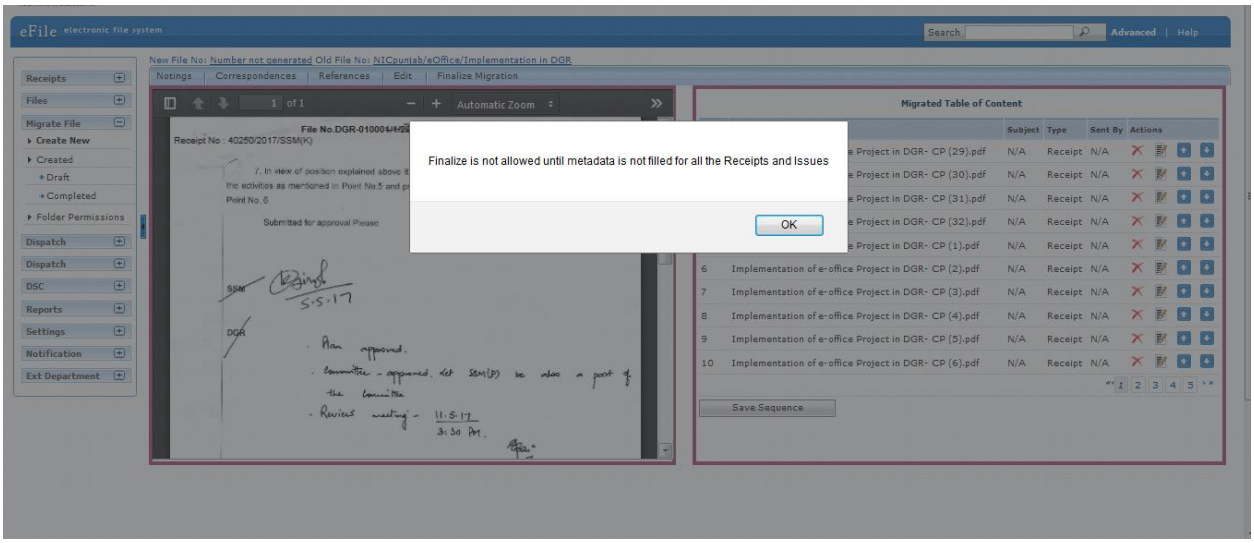
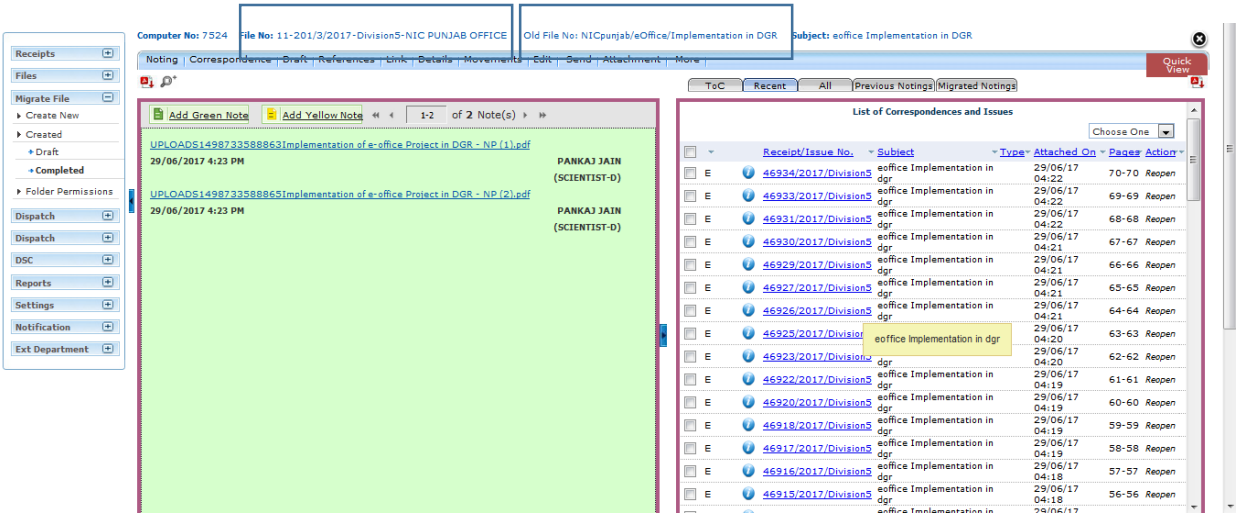
Open each receipt one by one ,fill metadata add details and press **GENERATE** button:



Now receipt number will change automatically as shown below:



As soon as all the correspondence receipts meta data is filled, user can press **FINALIZE MIGRATION. When** you press finalize migration below screen appears so press **OK.**



The following screen will open up after doing **finalize migration. Top row shows Old file number and new electronic file number.**