A DIGITAL WORK PLACE SOLUTION

E-OFFICE

E-File

User Manual

Prepared by

National Informatics Centre

E-OFFICE PORTAL

eOffice is an application that has been designed in sync with the needs of a modern Government and has been conceived as the instrument for the Next Generation Government. It paves a platform for Personalized, role based, secure access to internal information for the employees that is accessible through any browser. Personalized services are enabled and employees receive Electronic notifications of services and transactions based on their needs and contingencies.

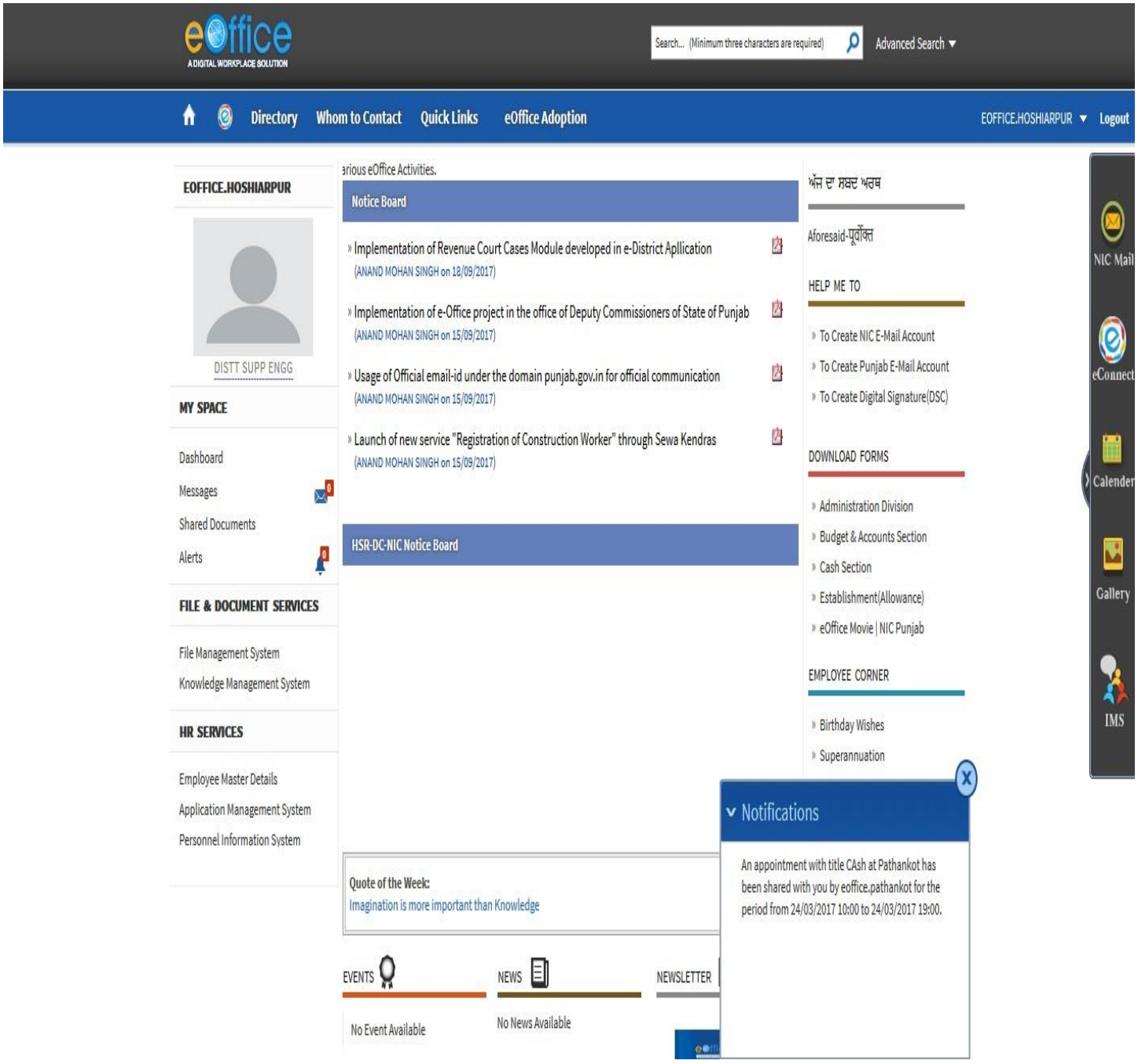
The main objectives of eoffice are:

1. To improve efficiency, consistency and effectiveness of government responses.
2. Establishing a paperless environment in government offices and to establish transparency and accountability.

The main modules of eoffice are:

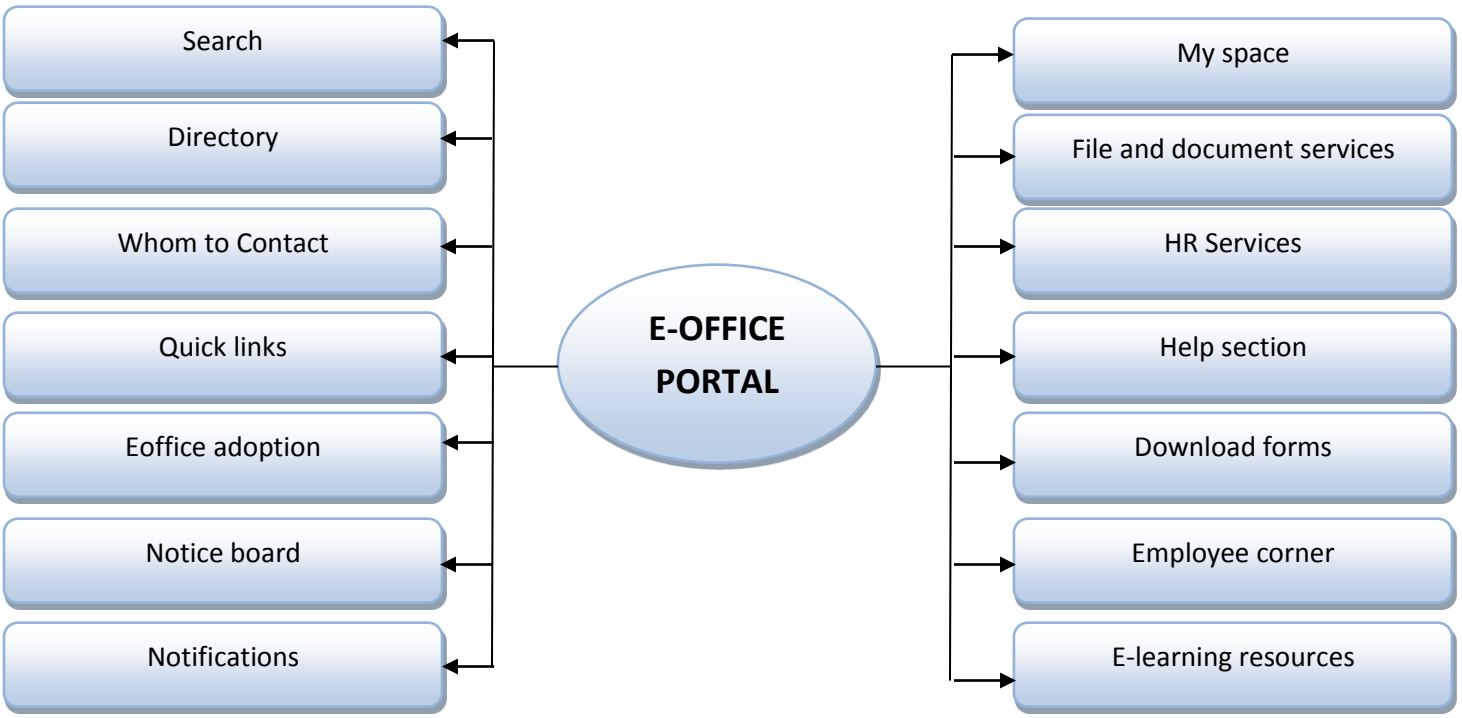
1. File management System.
2. Knowledge Management System.
3. Collaboration and messaging Services.
4. Employee Master Data

E-office portal looks like this:



Lets explore all the options that are available to us on the eoffice portal. There are following things that we can do as we login to eoffice:

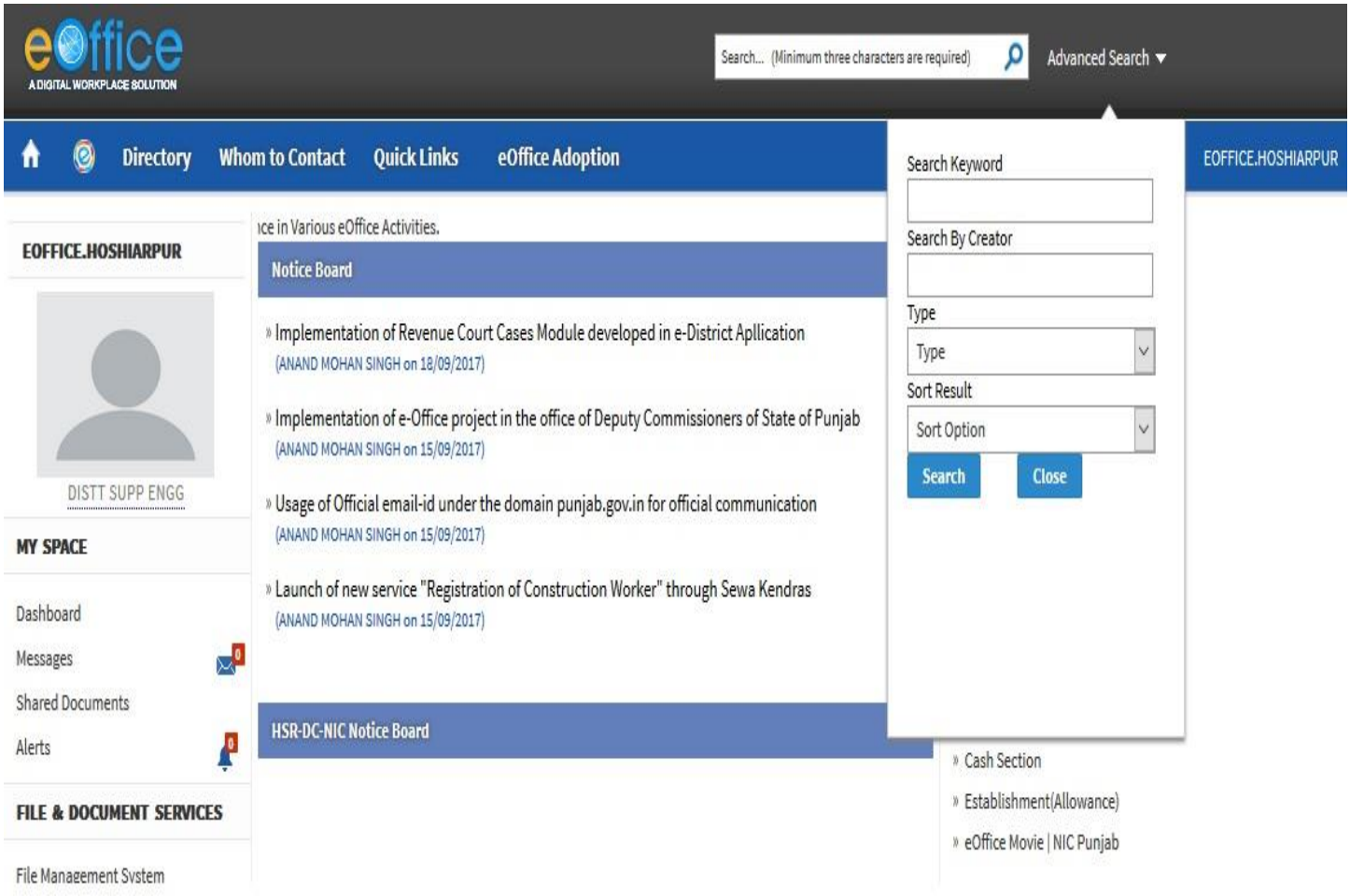
- Search/ Advanced search
- Directory
- Whom to contact
- Quick links
- Eoffice adoption
- Notice boards (State and Department)
- Notifications
- My space
- File and document services
- HR services
- Help section
- Form download
- Employee corner
- E-learning resources
- Links to other applications



SEARCH

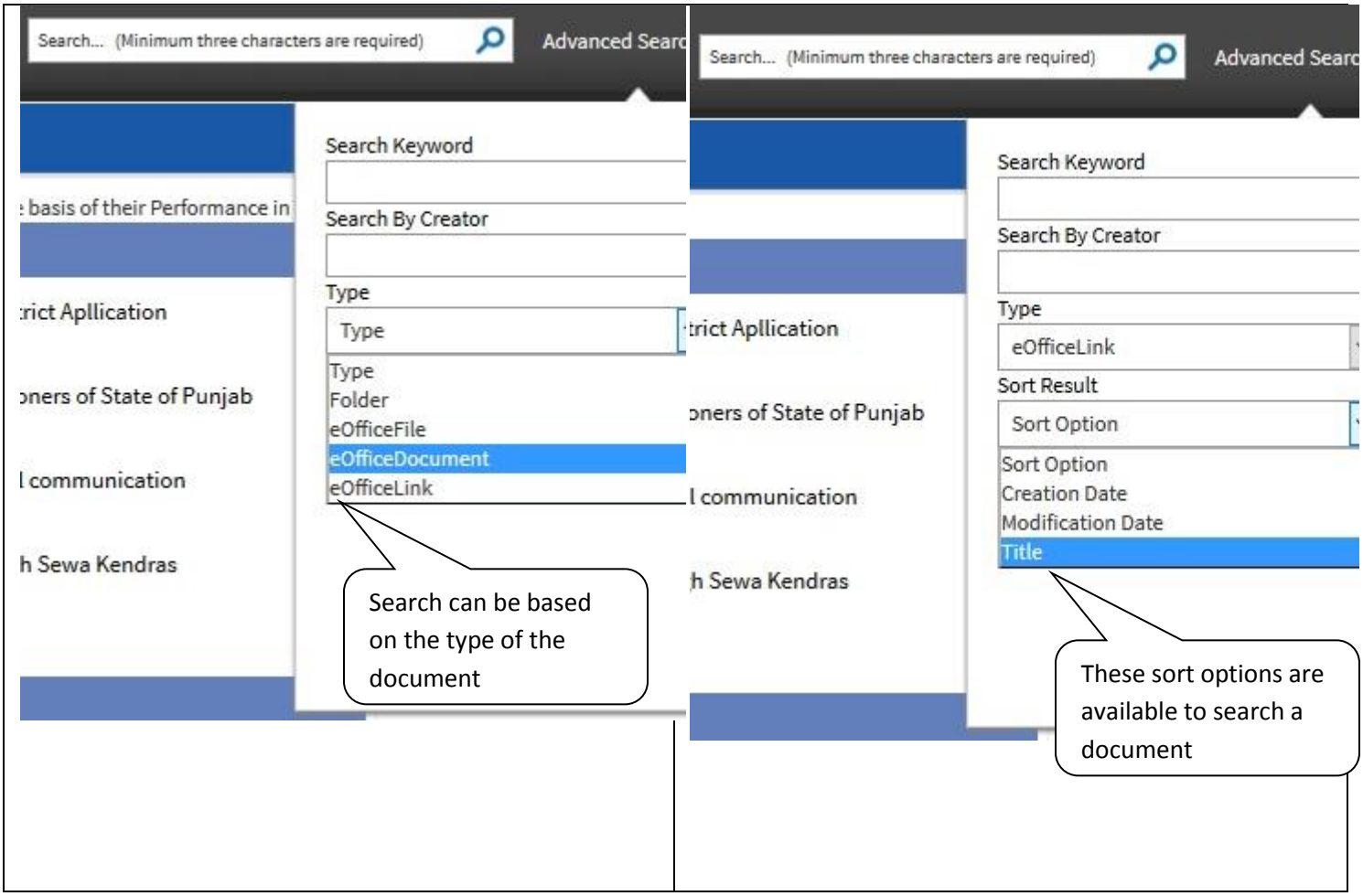
Search allows a user to search any document from KMS. There are two options available for searching:

- Basic Search
- Advanced search



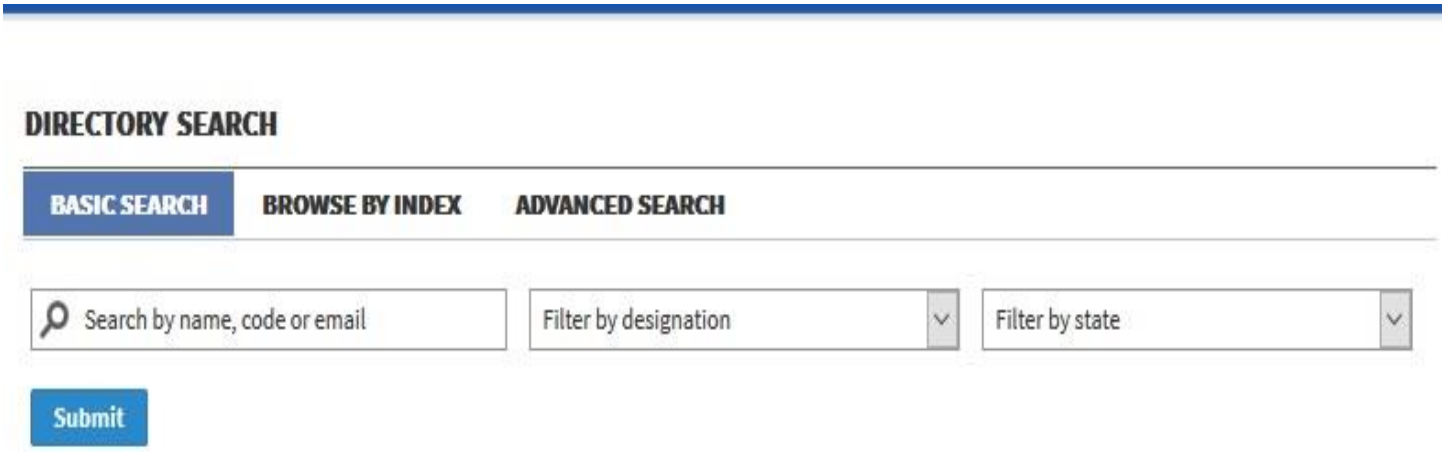
Advanced search allows a user to search based on following criteria:

- Search by keyword
- Search by creator
- Type
- Sort result



DIRECTORY

Directory contains the information like name, address, email, phone number of all the employees.



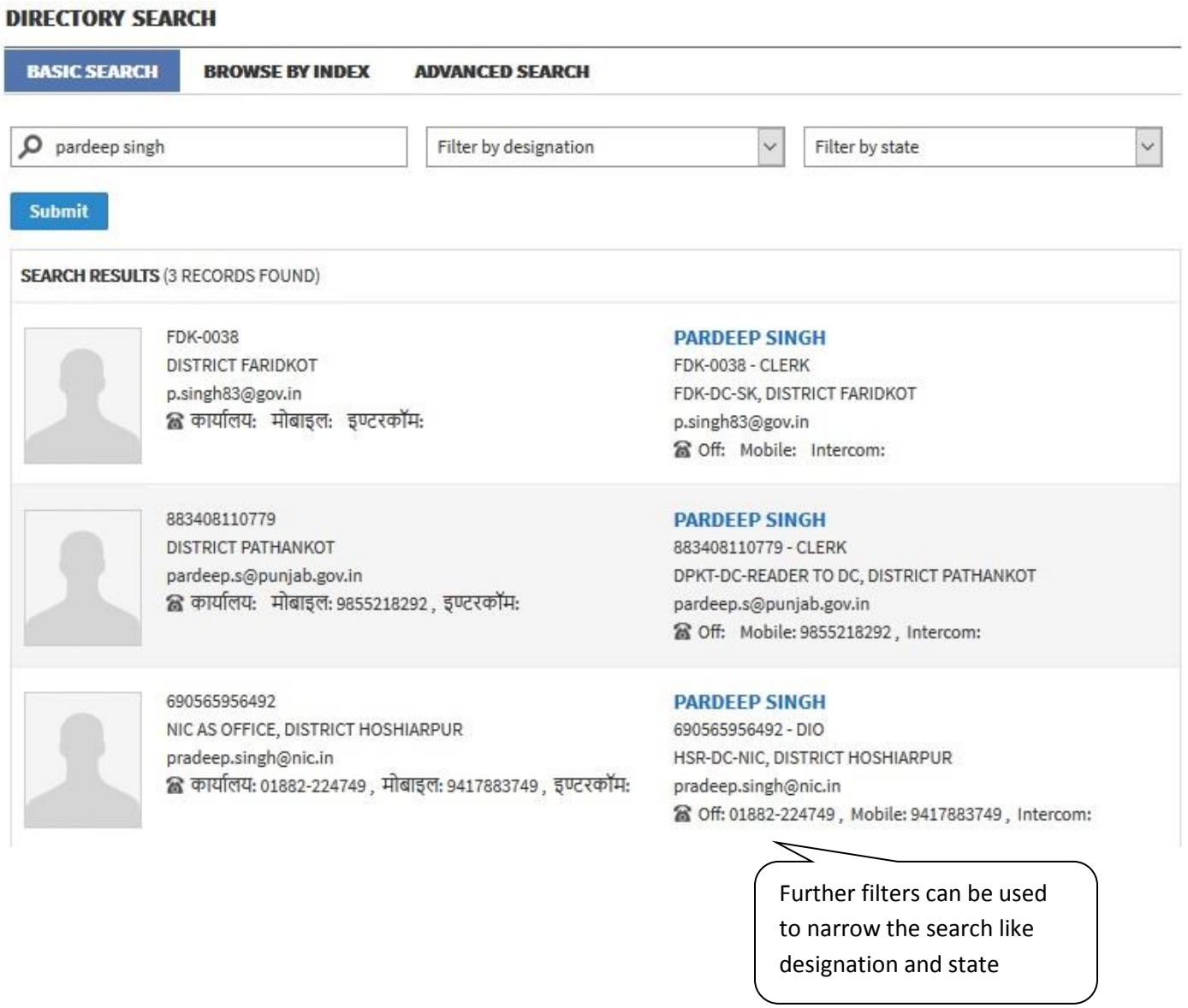
Directory can be searched in three ways:

- Basic search
- Browse by index
- Advanced search

BASIC SEARCH

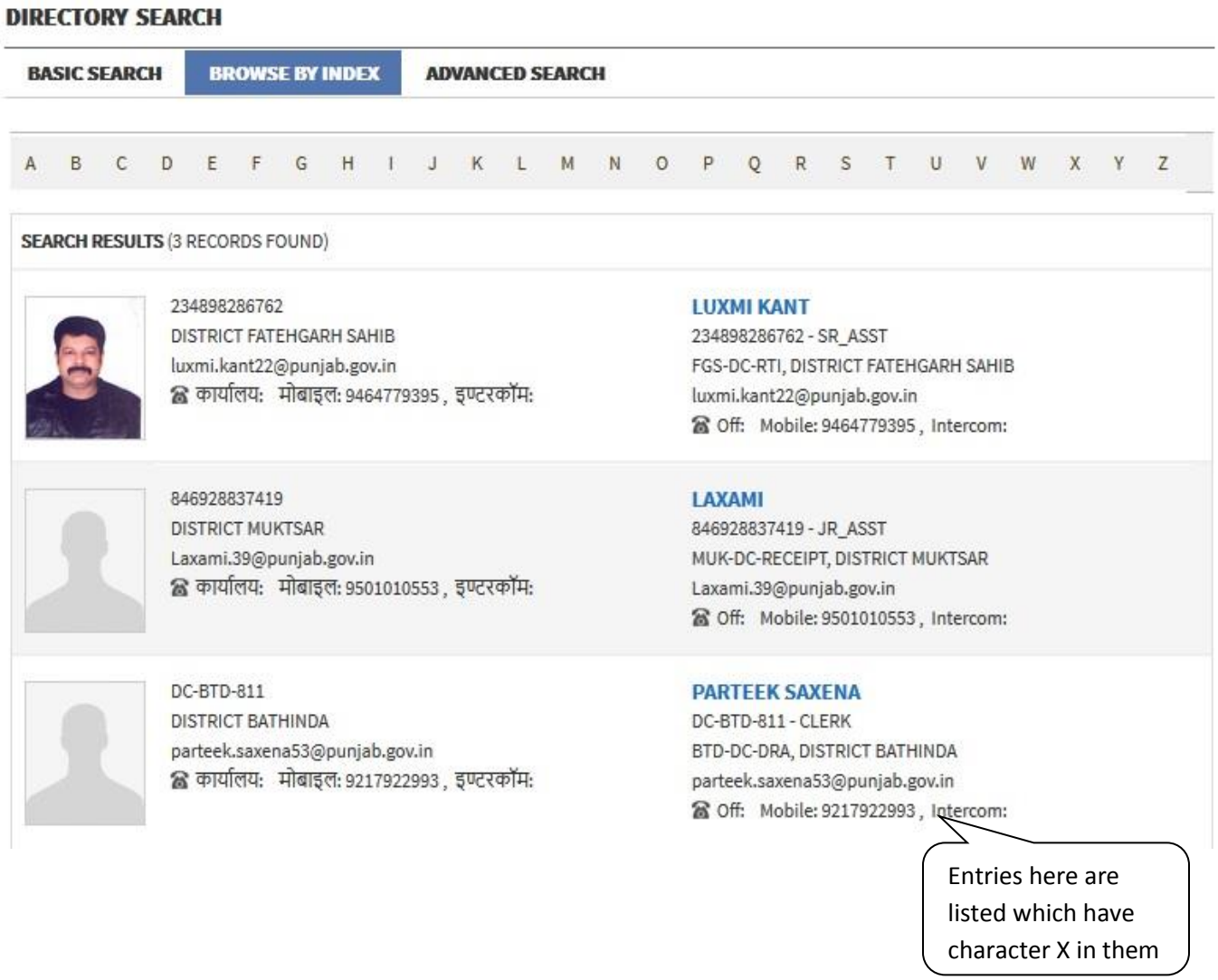
There are three options provided to search a directory in basic search

- Search by name, code or email
- Filter by designation
- Filter by state



BROWSE BY INDEX

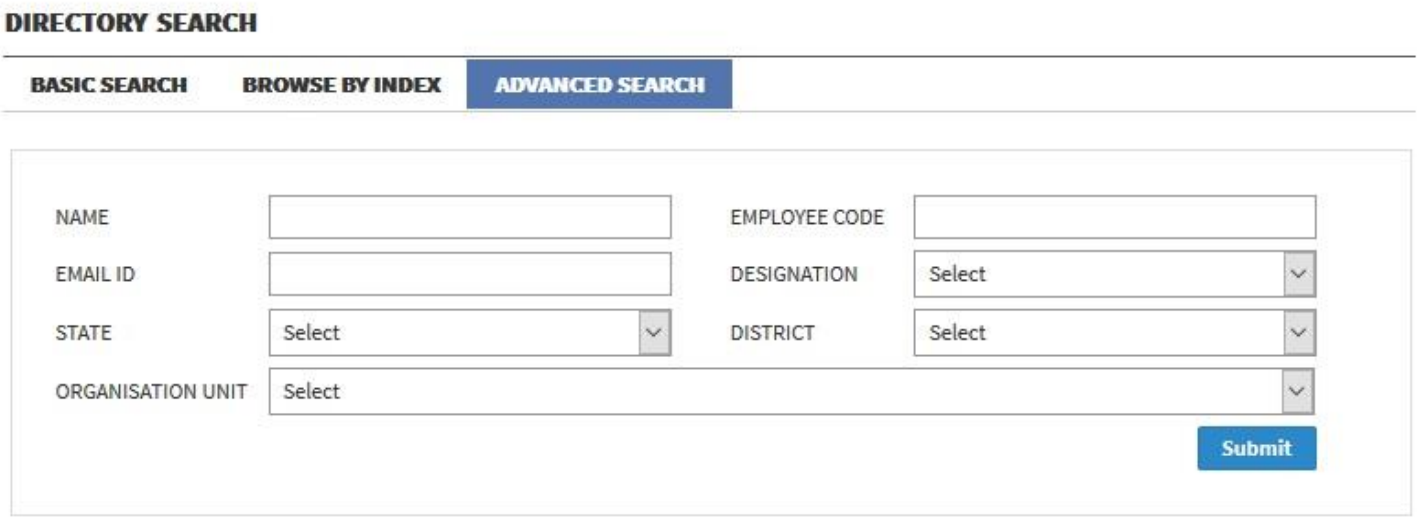
Anyone could be searced in the directory using the index.



ADVANCED SEARCH

Advanced search allows to search a directory based on the selection criteria such as:

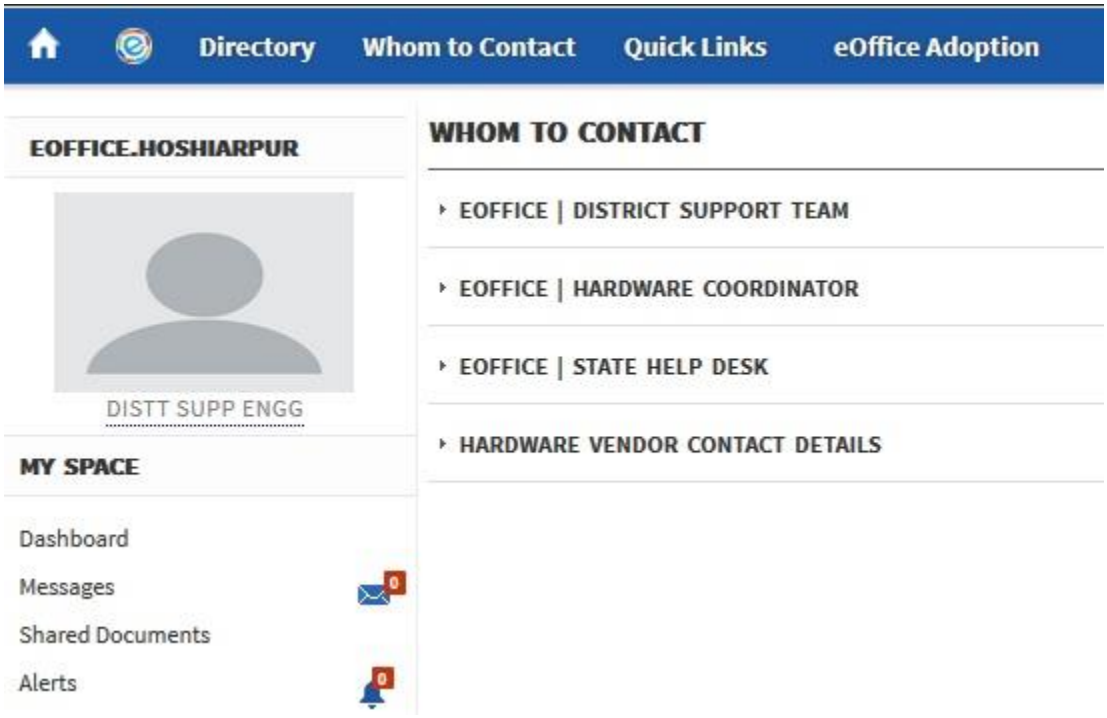
- Name
- Email ID
- Employee code
- Designation
- State
- District
- Organisational unit



WHOM TO CONTACT

This section provided contact information of the following:

- **District support team**: Provides email id and phone numbers of the eoffice team in the districts
- **Hardware coordinator**: Provides email id and phone numbers of the hardware coordinators in the districts
- **State help desk**: Provides contact information of the eoffice state team
- **Hardware vendor contact details**: Provides contact information of the different hardware vendons like HCL, Tritronics, Lenovo, Qi enterprises



QUICK LINKS

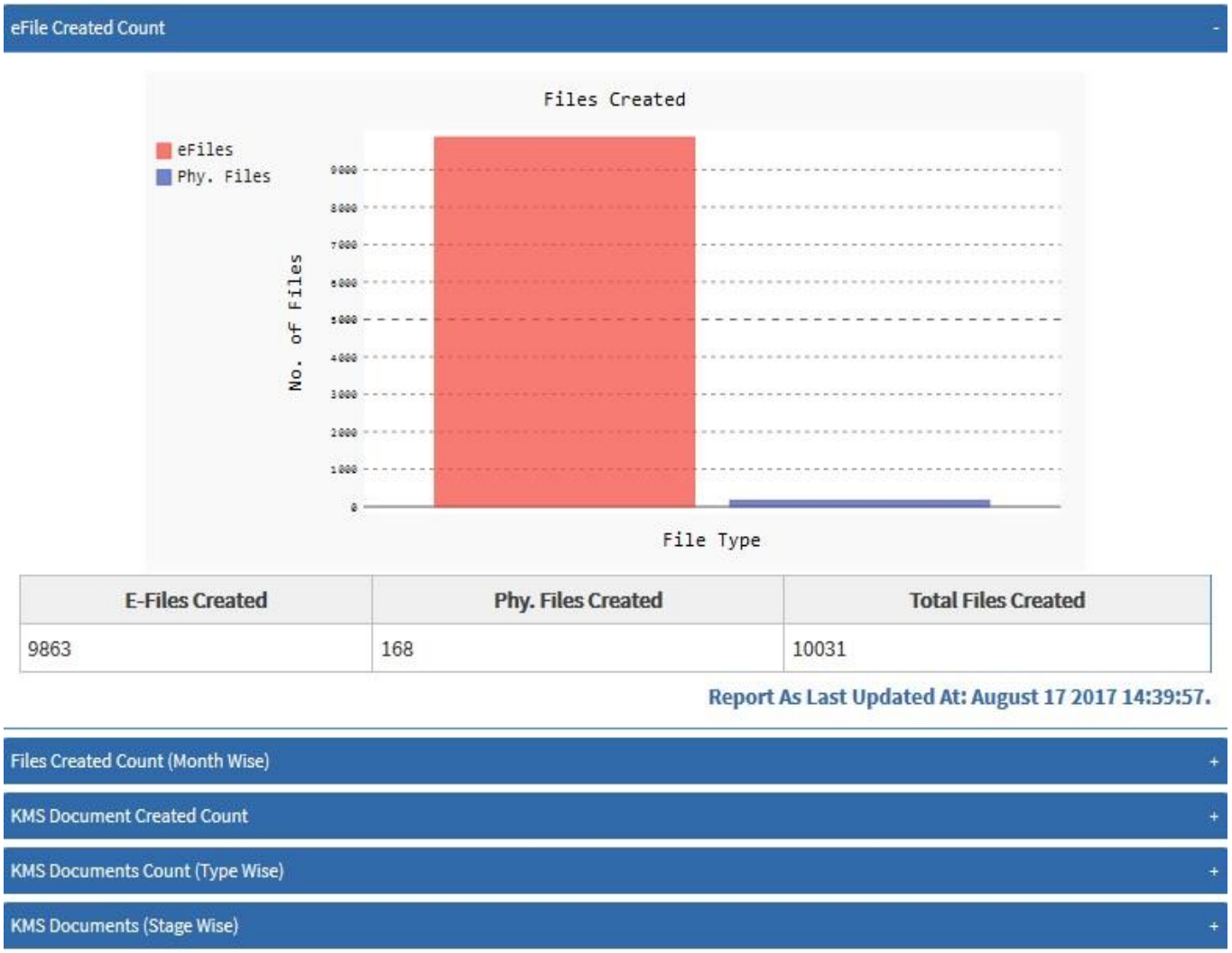
Quick links provide a link to the following:

- Department of governance reforms
- GOI web directory
- Government of India (Official website)
- Government of Punjab (Official Website)

EOFFICE ADOPTION

Eoffice adoption is a feature to see how well a particular District has adopted eOffice. It shows records of creation and movements of Files and Receipts in eFile module in detailed manner.
It provide information about the following:

- **eFile created count**



E-Files Created	Phy. Files Created	Total Files Created
9863	168	10031

Report As Last Updated At: August 17 2017 14:39:57.

Files Created Count (Month Wise) +

KMS Document Created Count +

KMS Documents Count (Type Wise) +

KMS Documents (Stage Wise) +

- **Files created count (Month wise)**

eFile Created Count +

Files Created Count (Month Wise) -

Files Created - Current Month	Files Created - Past Month	Files Created - Previous Months
0	1	0

Report As Last Updated At: August 17 2017 14:39:57.

KMS Document Created Count +

KMS Documents Count (Type Wise) +

KMS Documents (Stage Wise) +

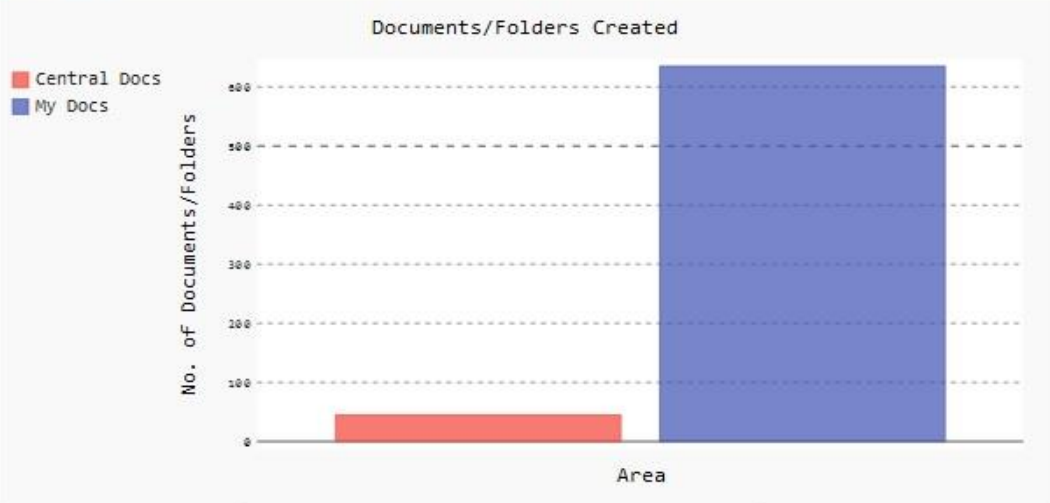
*Note: More Details can be extracted from respective applications

- **KMS Document created count**

eFile Created Count +

Files Created Count (Month Wise) +

KMS Document Created Count -



Total Documents Created	Documents Created(Central Docs)	Documents Created(My Docs)
680	45	635

Report As Last Updated At: August 10 2017 15:09:23.

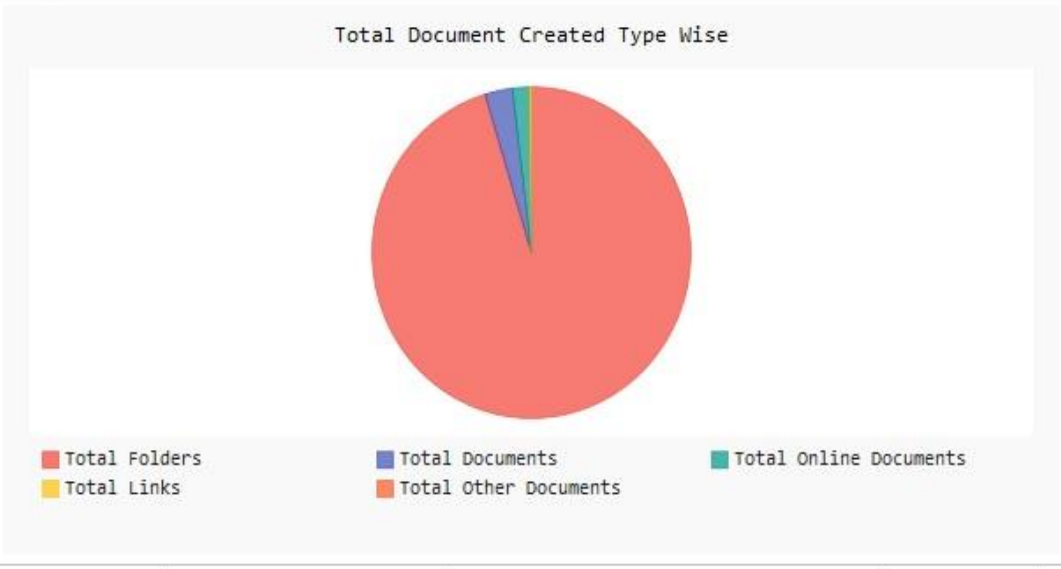
KMS Documents Count (Type Wise) +

KMS Documents (Stage Wise) +

*Note: More Details can be extracted from respective applications

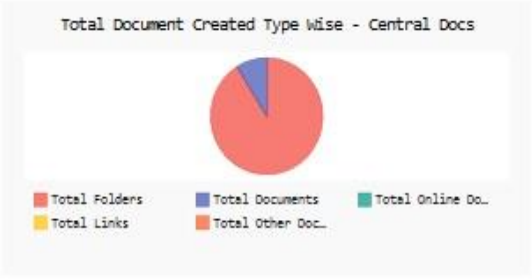
- **KMS Documents count (Type wise)**

KMS Documents Count (Type Wise)

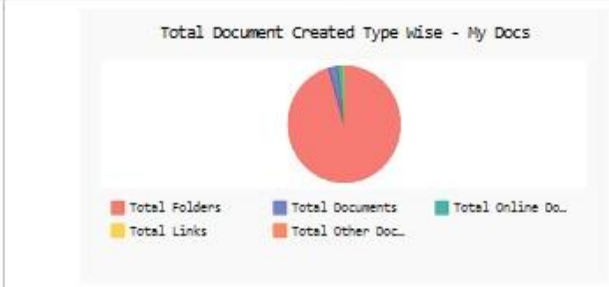


Total Folders	Documents	Online Documents	Links	Others
648	19	12	1	0

Report As Last Updated At: August 10 2017 15:09:23.



Total Folders	Documents	Online Documents	Links	Others
41	4	0	0	0



Total Folders	Documents	Online Documents	Links	Others
607	15	12	1	0

- **KMS Documents (Stage wise)**

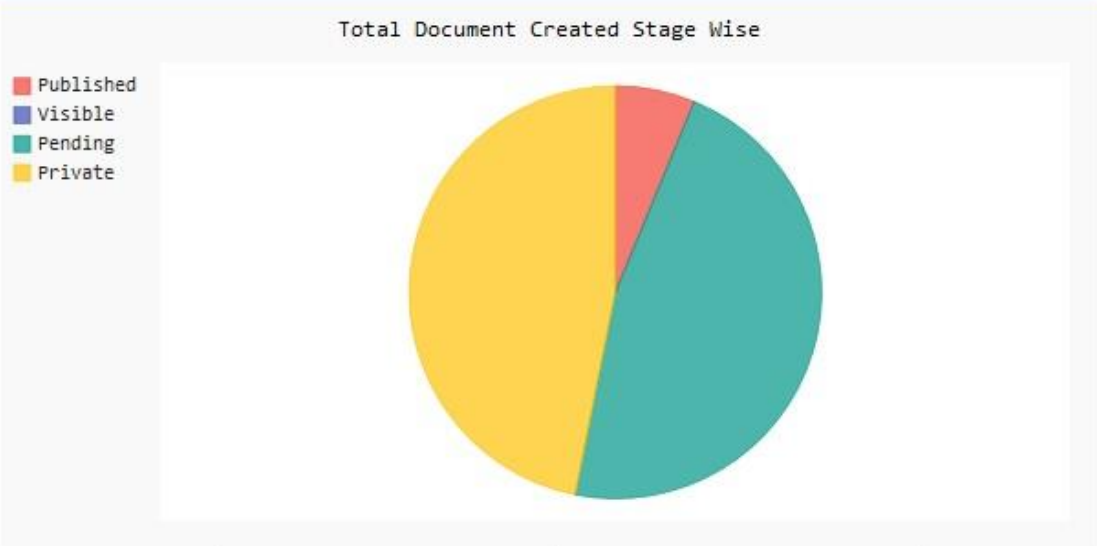
eFile Created Count +

Files Created Count (Month Wise) +

KMS Document Created Count +

KMS Documents Count (Type Wise) +

KMS Documents (Stage Wise) -



Total Documents Published	Total Documents Visible	Total Documents Pending	Total Documents Private
2	0	15	15

Report As Last Updated At: August 10 2017 15:09:23.

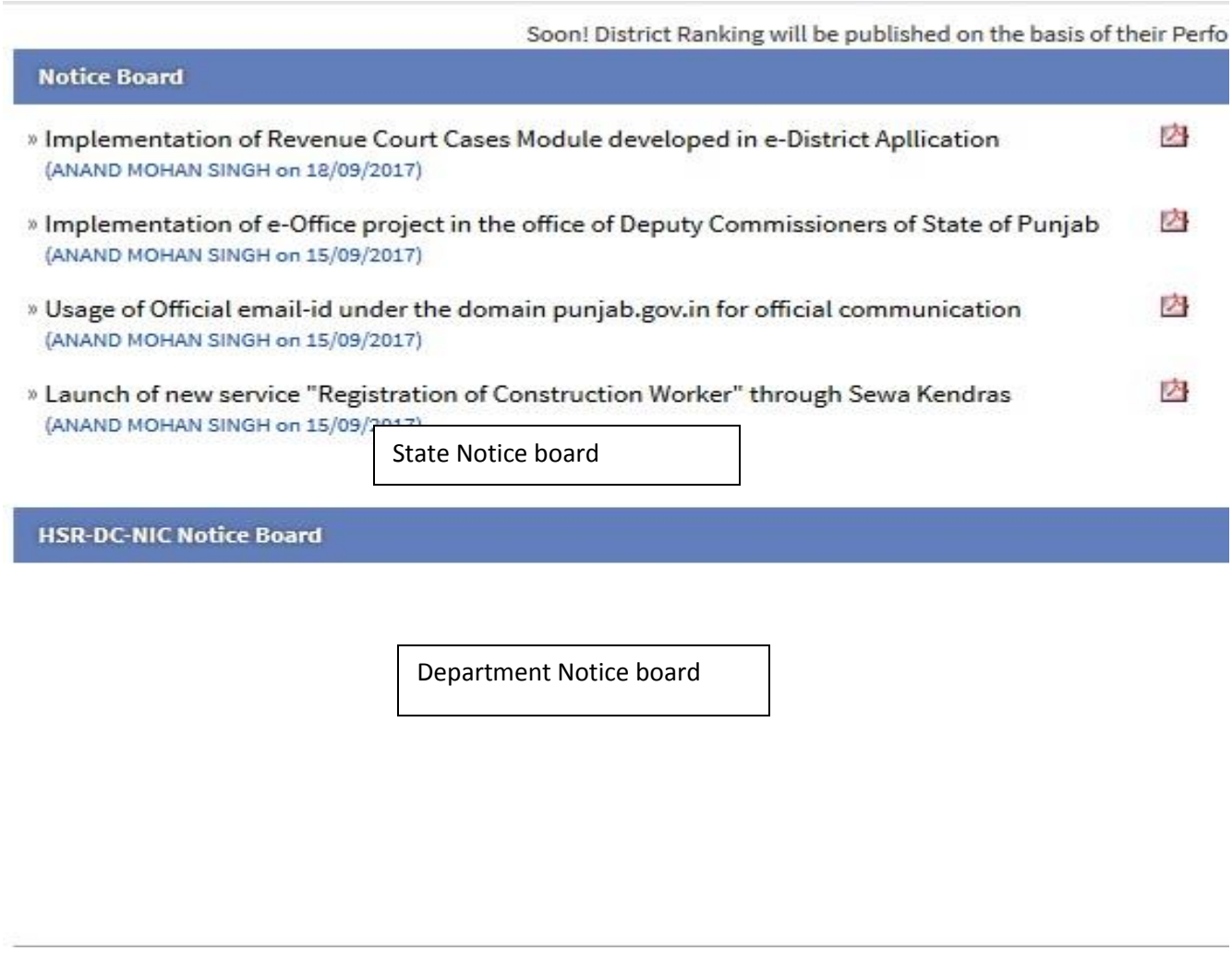
*Note: More Details can be extracted from respective applications

NOTICE BOARDS

There are two notice boards which have different scope:

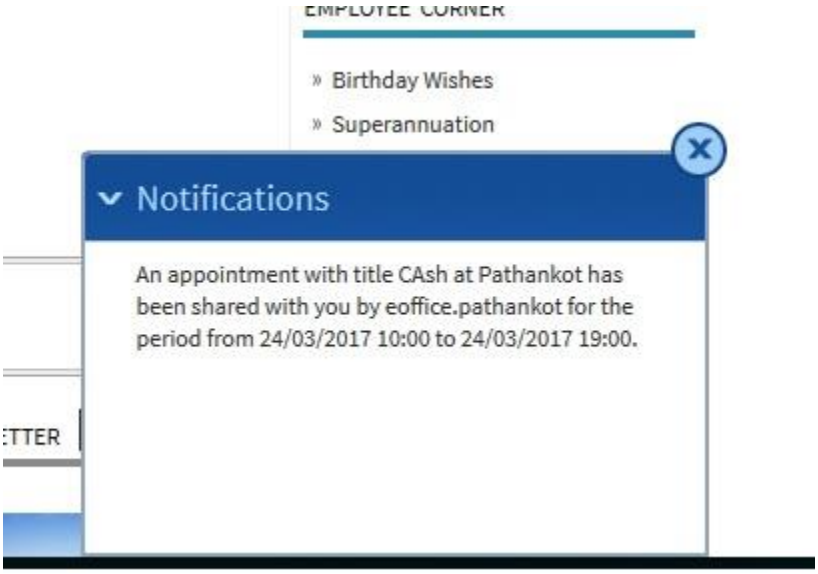
- **Upper notice board**: This is called State Notice board. Notices that are to be shared with all the districts of Punjab will be displayed here.

- **Lower notice board**: This is called department notice board. Notices specific to the user's department will be displayed here.



NOTIFICATIONS

Notifications about new file send to you, any messages, subscribed documents etc. will come in your notifications tab.

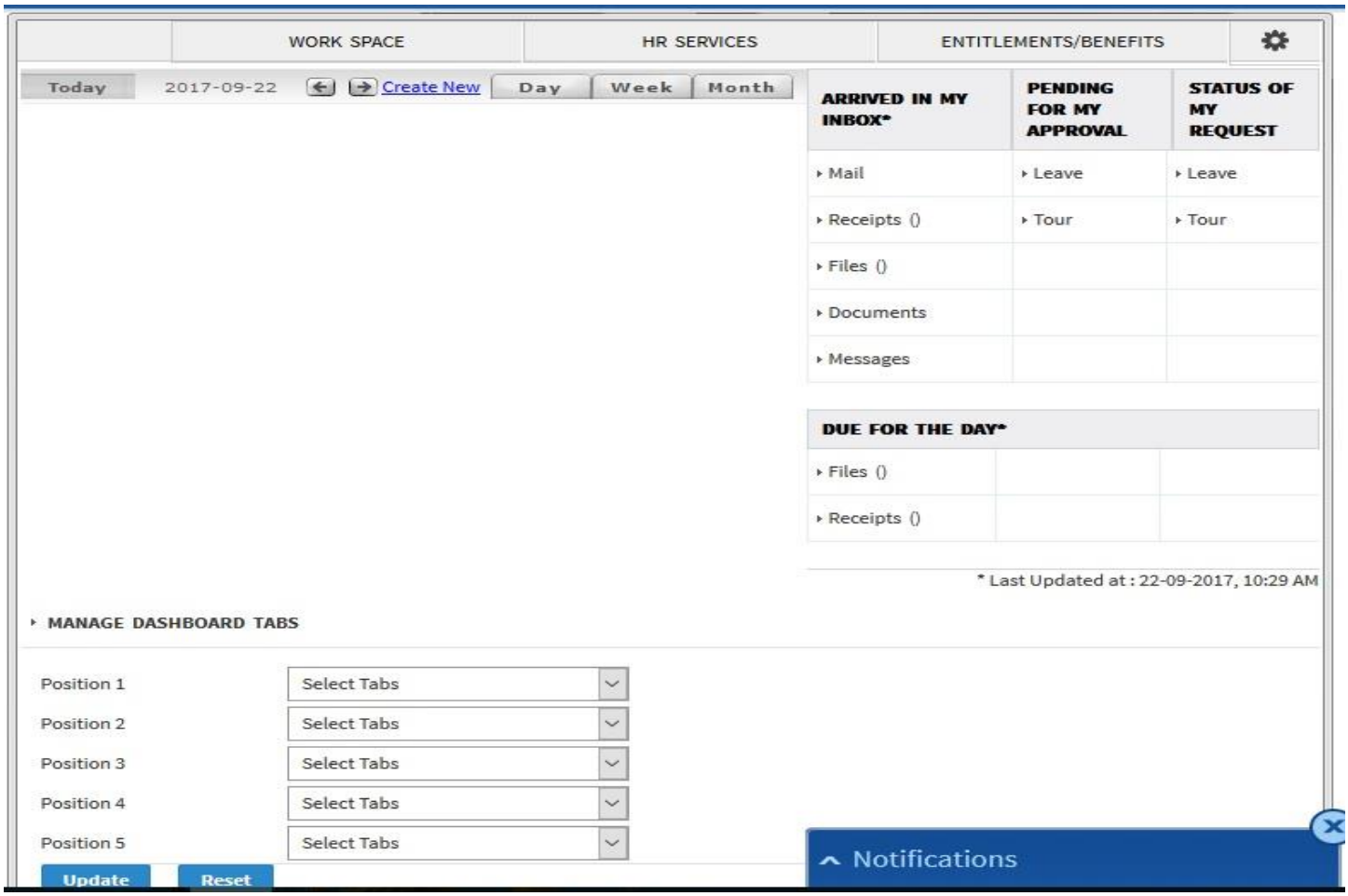


MY SPACE

My space provides access to the following:

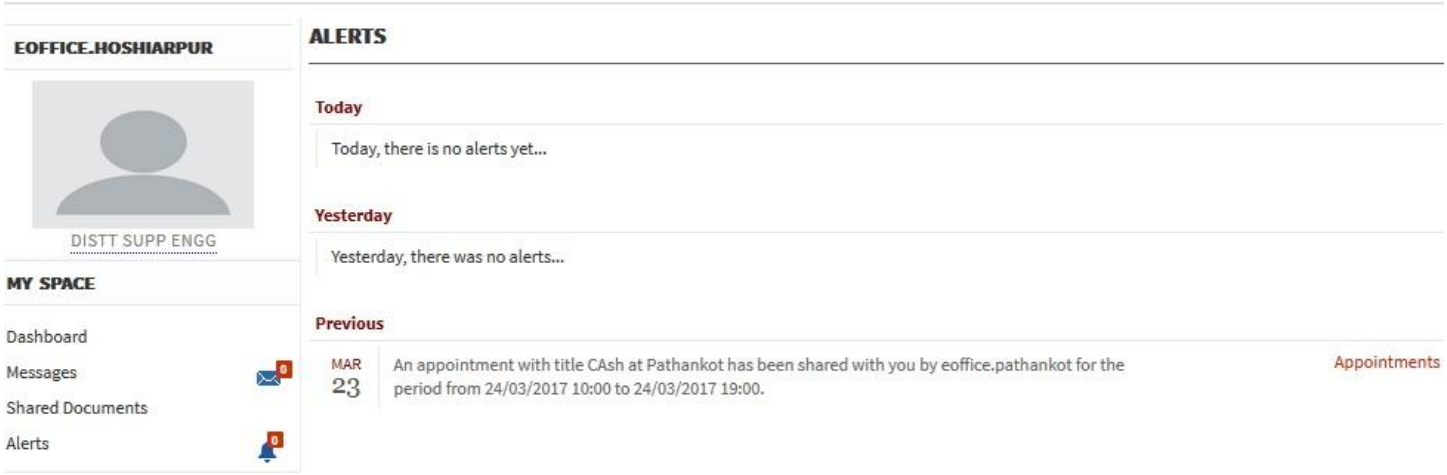
- Dashboard
- Messages
- Shared Documents
- Alerts

DASHBOARD: It contains all the information relating to status of requests for tour and leave. Also, lets a user create a new calendar appointment/event using *create new*



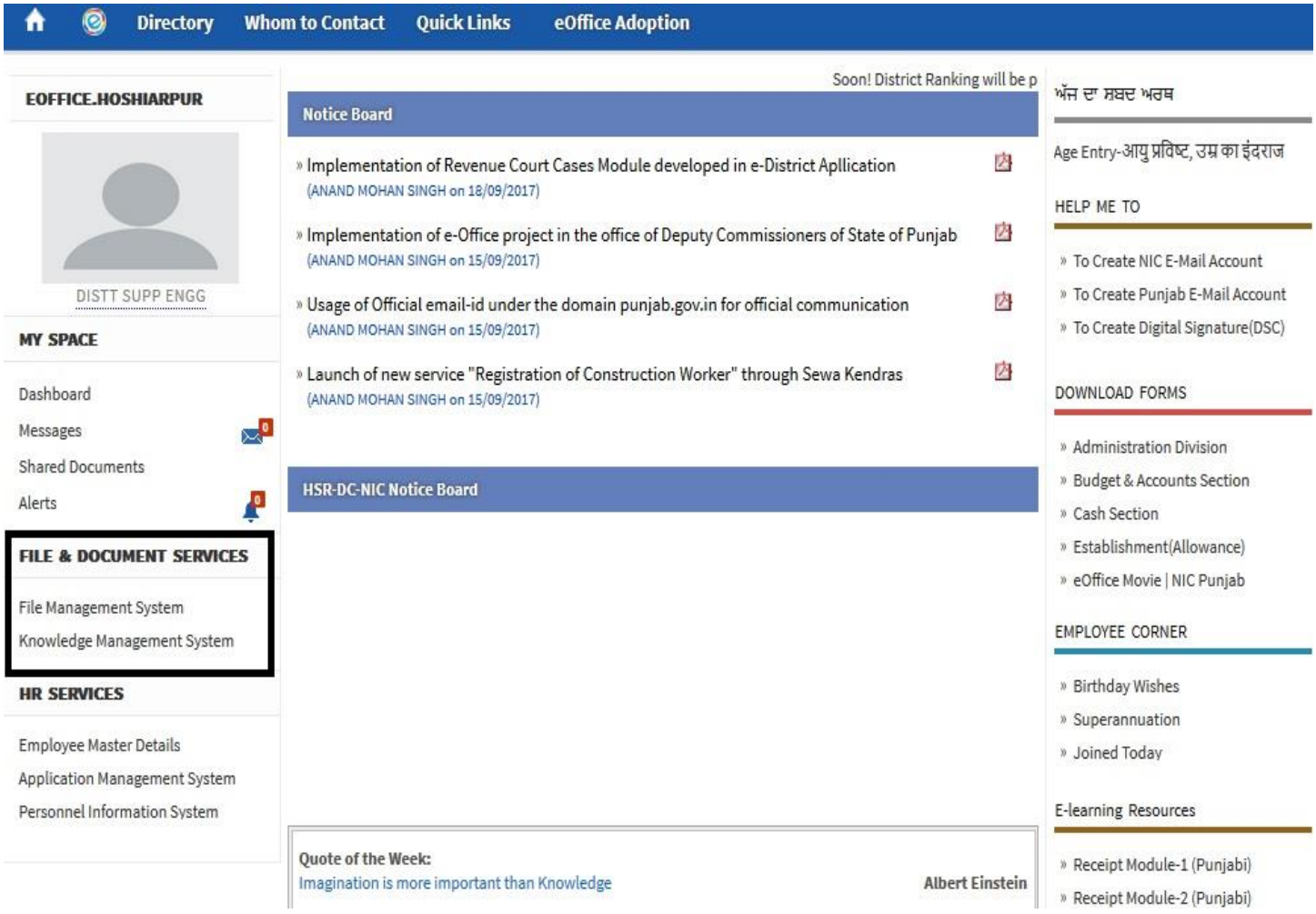
SHARED DOCUMENTS: Contains list of KMS documents that are shared with the user

ALERTS: Provide information on events/Appointments



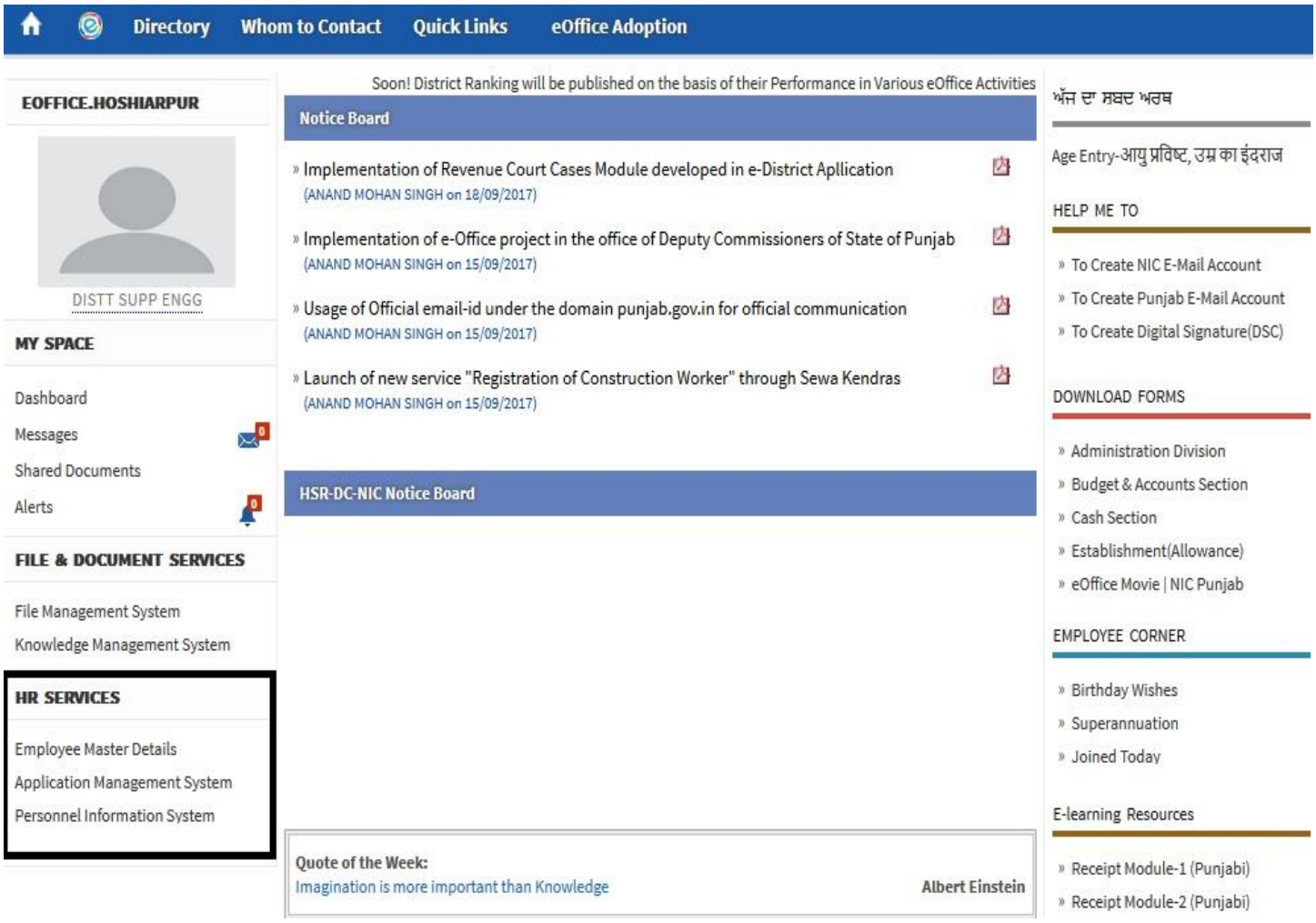
FILE AND DOCUMENT SERVICES

Provides link to file management system and knowledge management system.



HR SERVICES

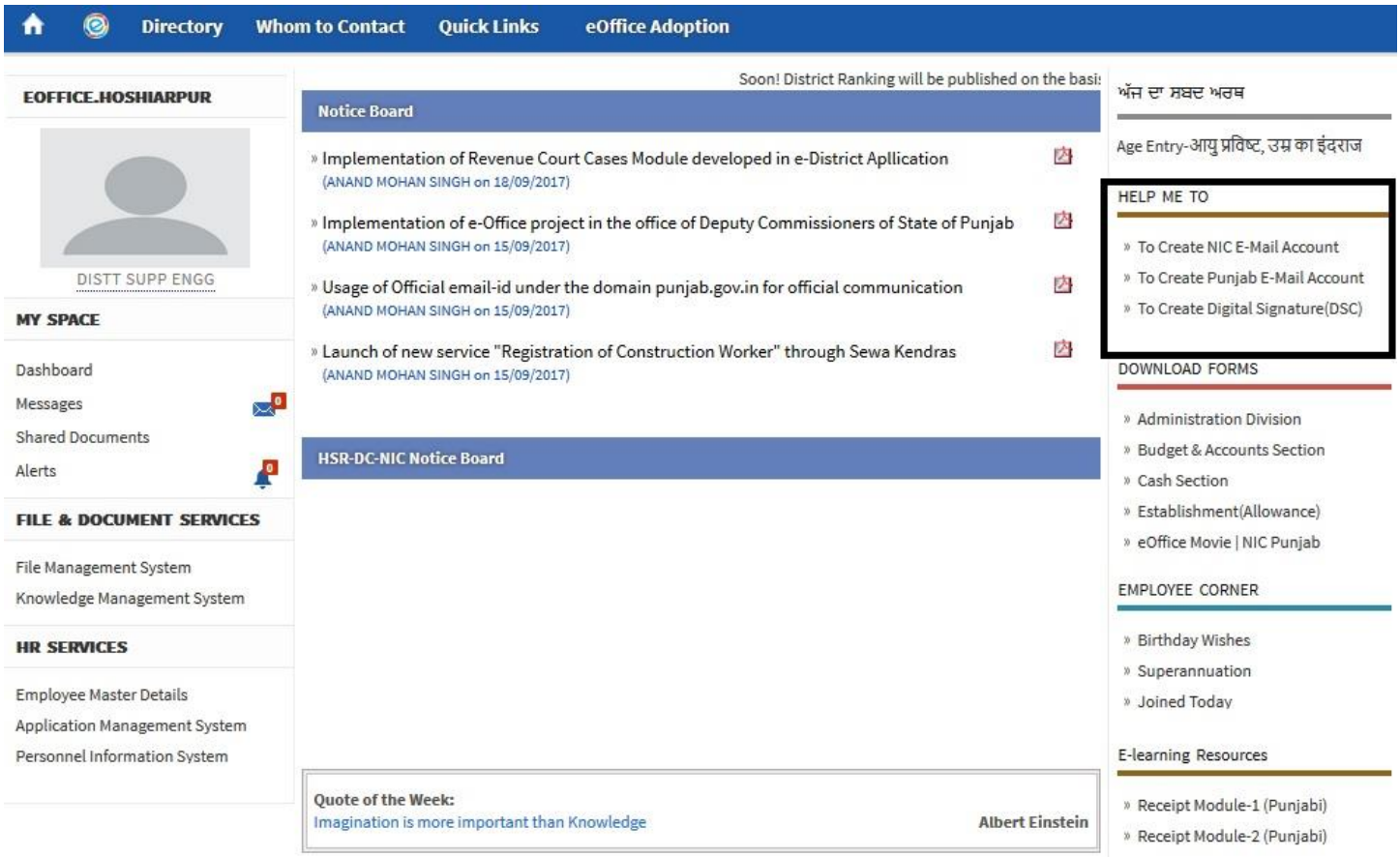
Provides link to Employee master details, Application management system and Personnel information system.



HELP SECTION

This section provides information on how to :

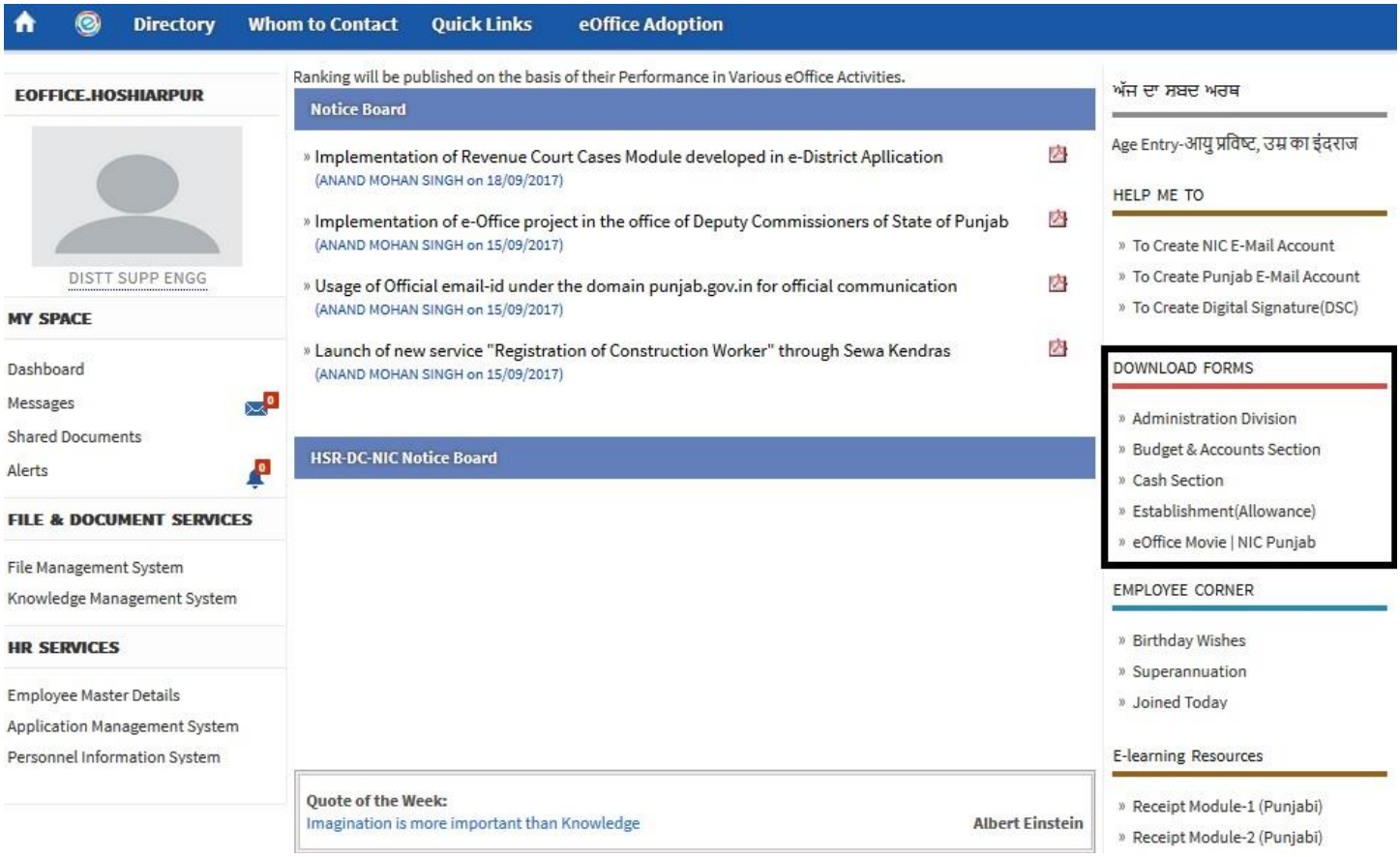
- Create NIC E-mail account
- Create Punjab E-mail account
- Create Digital signature



DOWNLOAD FORMS

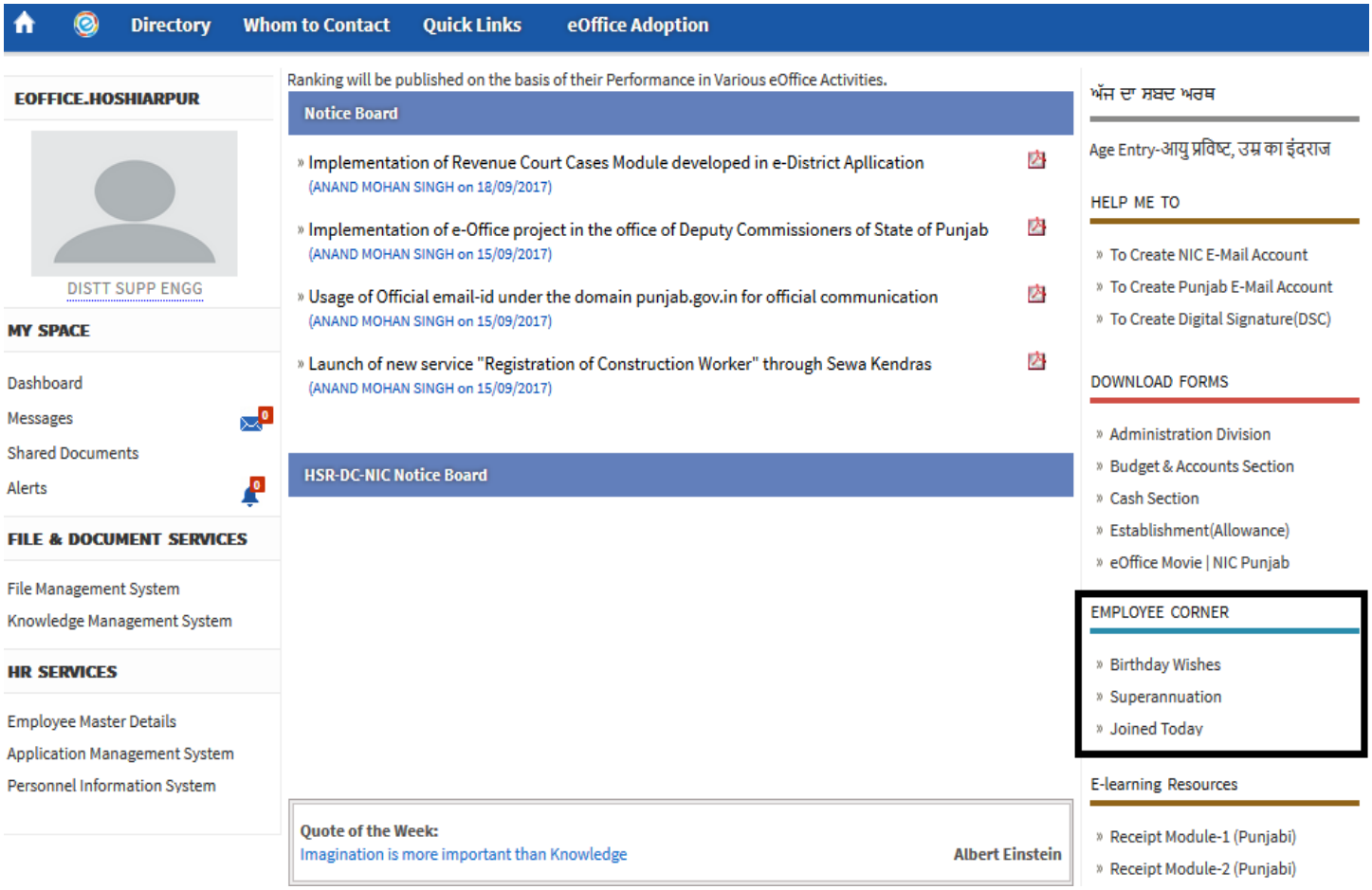
This section provides a provision to download forms relating to different sections:

- Administrative Division
- Budget and accounts section
- Cash section
- Establishment



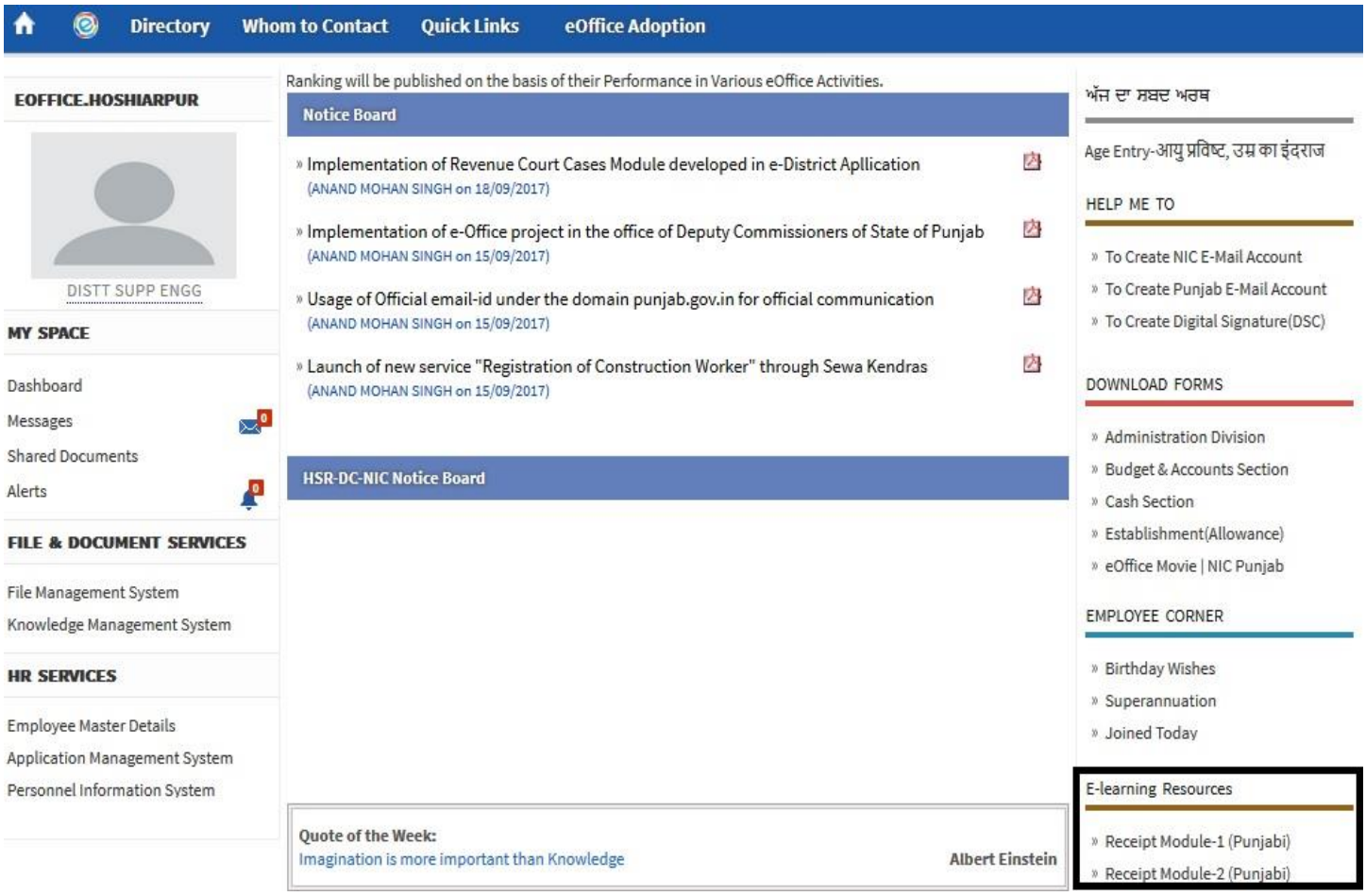
EMPLOYEE CORNER

This section contains information relating to employees like birthdays, new joining etc.



E-LEARNING RESOUCES

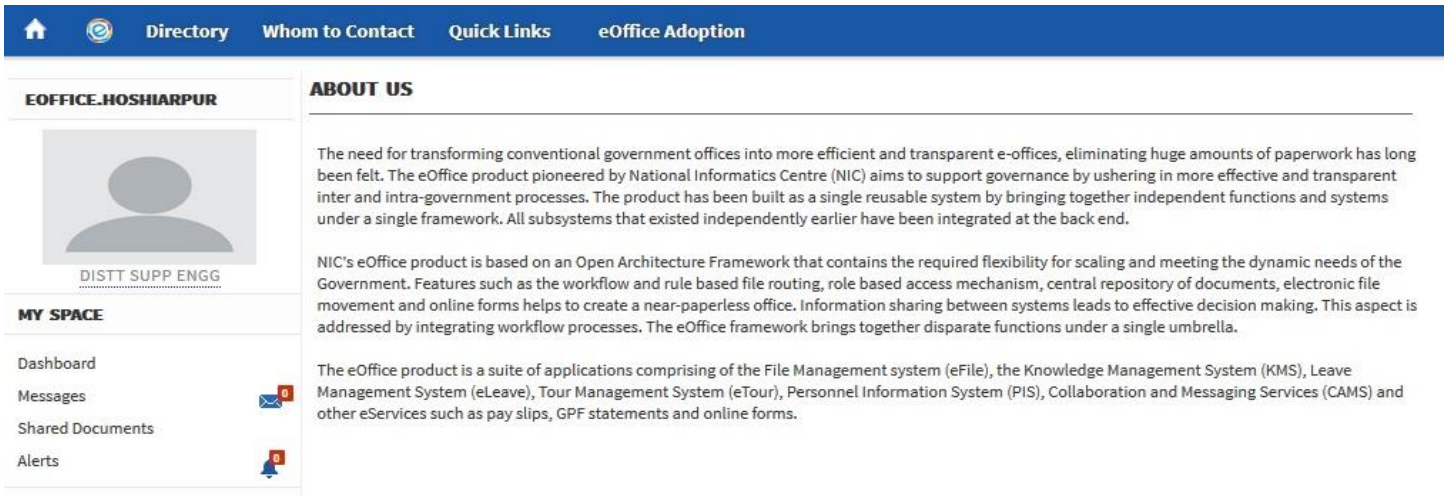
This section provides links to eoffice learning resources.



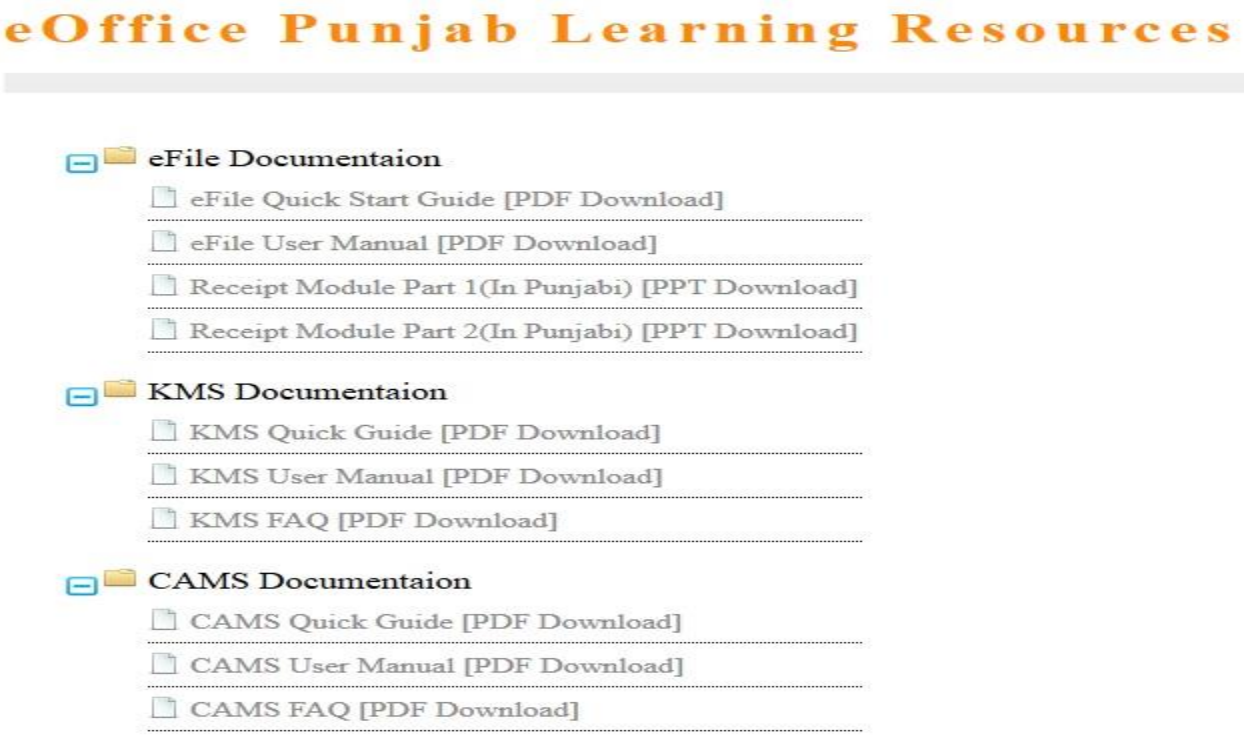
ADDITIONAL FEATURES

At the footer of the eoffice portal links are provided to various sections:

About us

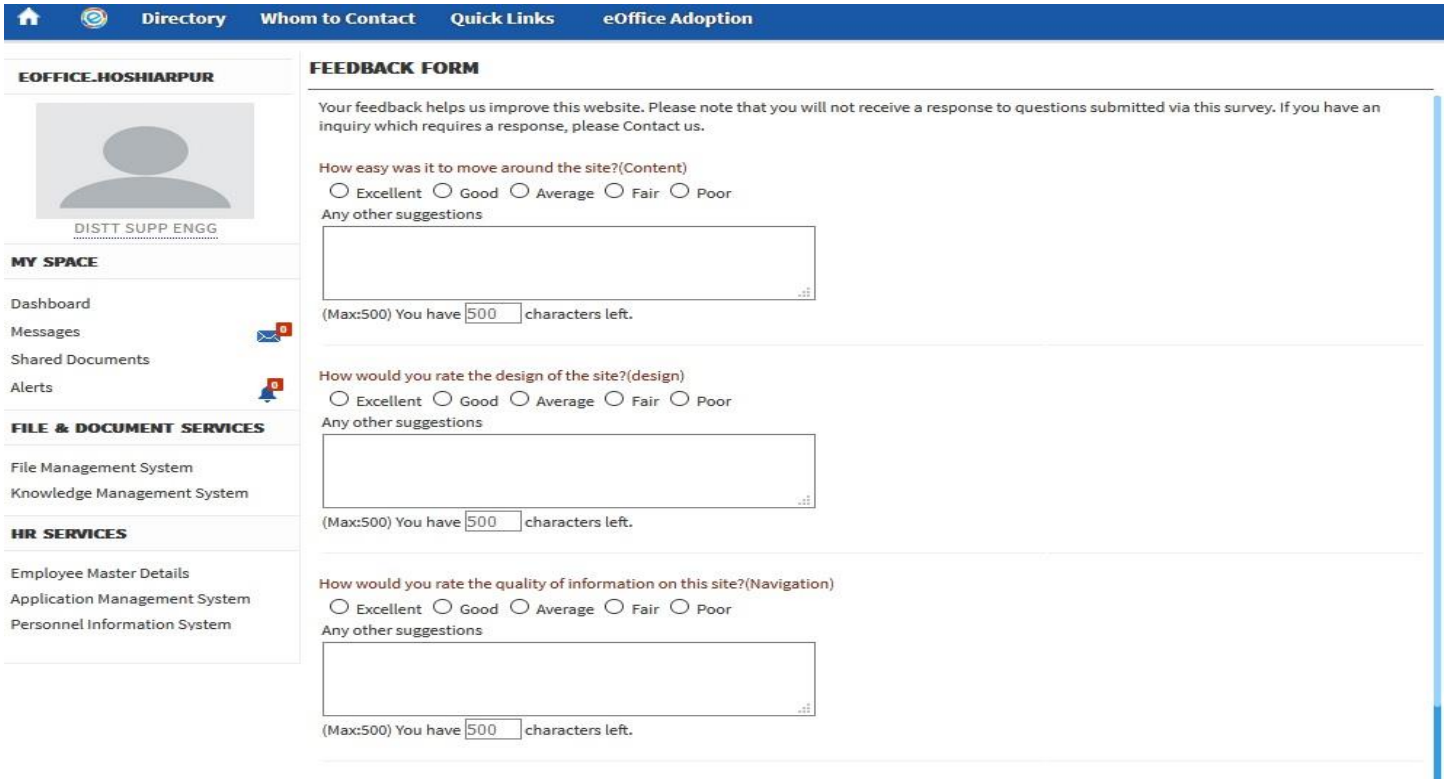


eOffice learning resources

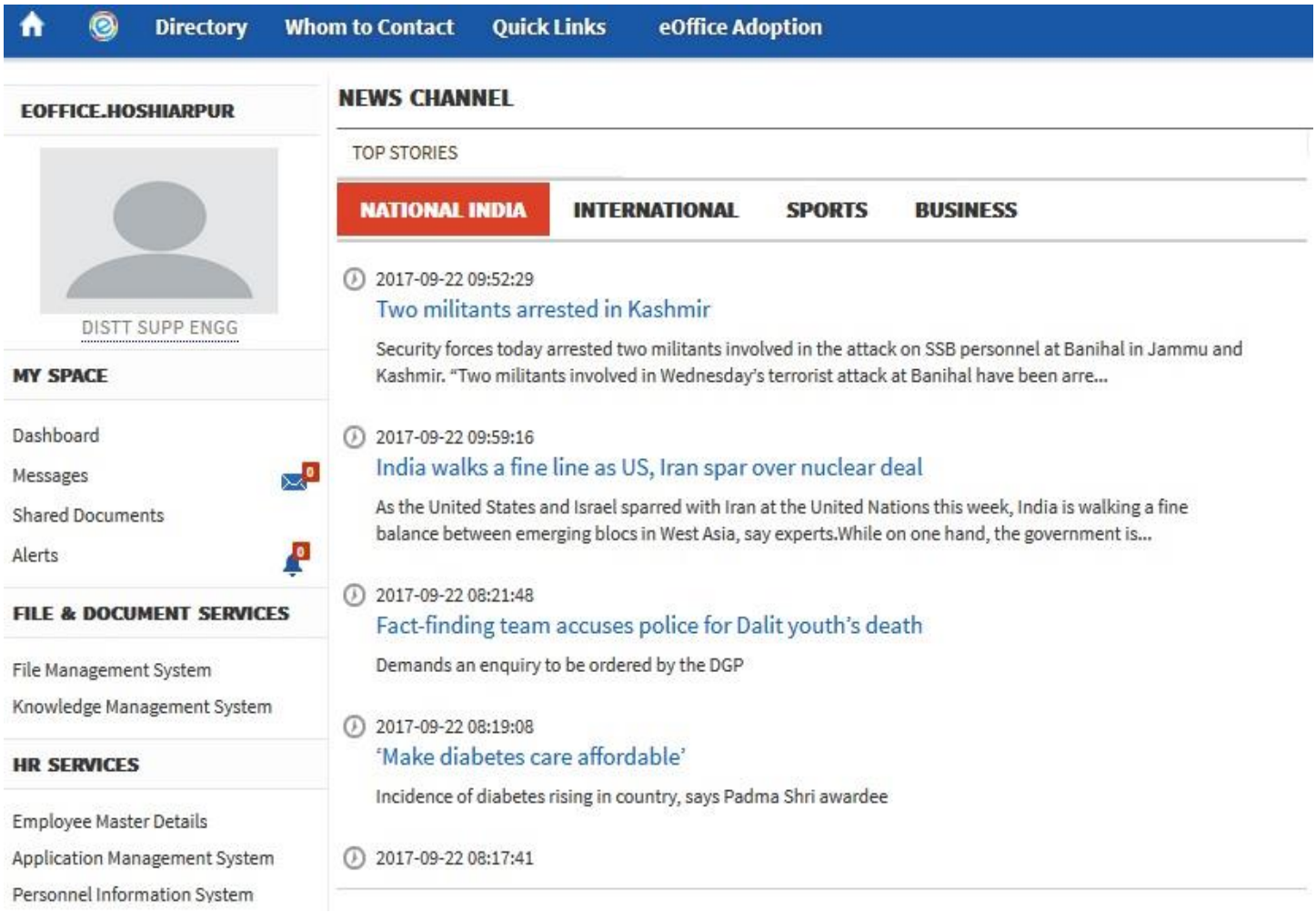


Contact us

Feedback



News Channel



Apart from these on the extreme right of the portal links are provided to other applications:

- NIC mail
- eConnect
- Calendar
- Gallery
- IMS

LOGOUT

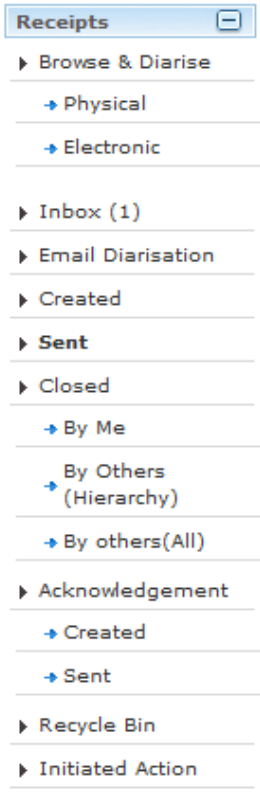
User cannot log in with the same user id simultaneously from different tabs of a browser / different browsers in one system. An alert box appears about existing logged in user session and confirmation to log out of one session to start a new login.

FMS

RECEIPTS

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

There are number of links available under receipts section:



Browse and Diarize

There are further two options in this section

- **Physical**: Only diarization of the correspondence is done for tracking purpose, but scanning and uploading is not mandatory.
- **Electronic**: Scanning and uploading of the correspondence is mandatory.

In case of DAK that have a classified grading, proper grading levels are assigned to the DAK while diarizing them. Classification levels are:

- Normal
- Confidential
- Secret
- Top Secret

Let's have a look at how electronic diarization is done:

- Click the electronic module under Browse and Diarize link of receipts section as a result, the browse and diarize screen for electronic receipt appears
- Click the browse button, a file upload dialog box appears, select the receipt you want to upload
- Enter the essential details in all the mandatory fields marked with a red *
- Click the generate receipt button to generate a unique diary number. As a result, the receipt gets generated along with the specified metadata.

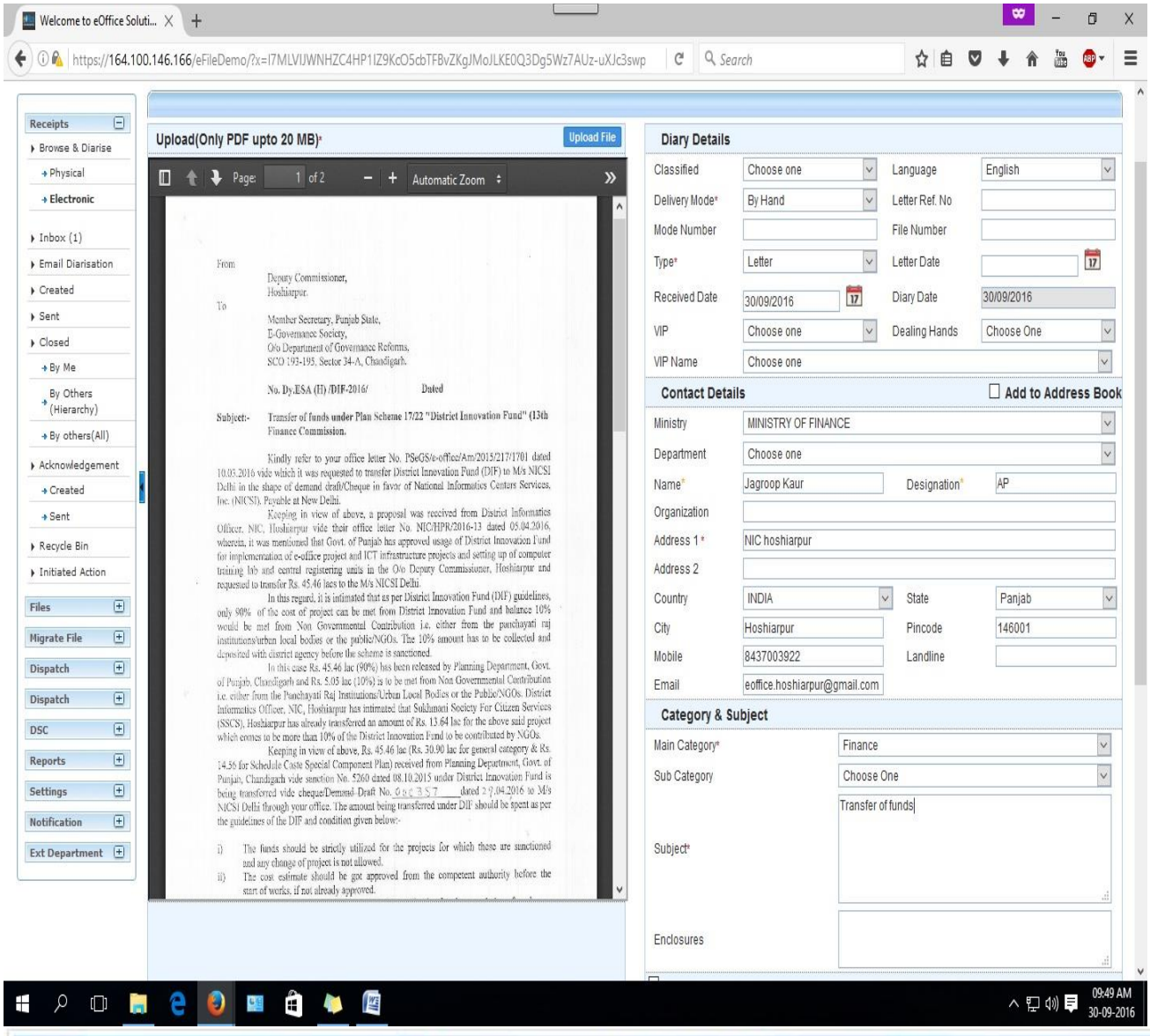
Browse & Diarize

Electronic

Browse & upload file

Enter details

Generate Receipt



Now we have two options

- **Generate:** Generates a receipt number and moves to created folder, but receipt is not yet sent to anyone.
- **Generate and send:** Generates a receipt number as well as send it and receipt is moved to sent folder.

Number of options is available for the receipt after it is generated

1. Send

2. Reply

3. Put in a file

4. Copy

5. Dispatch

6. Movements

7. Edit

8. Close

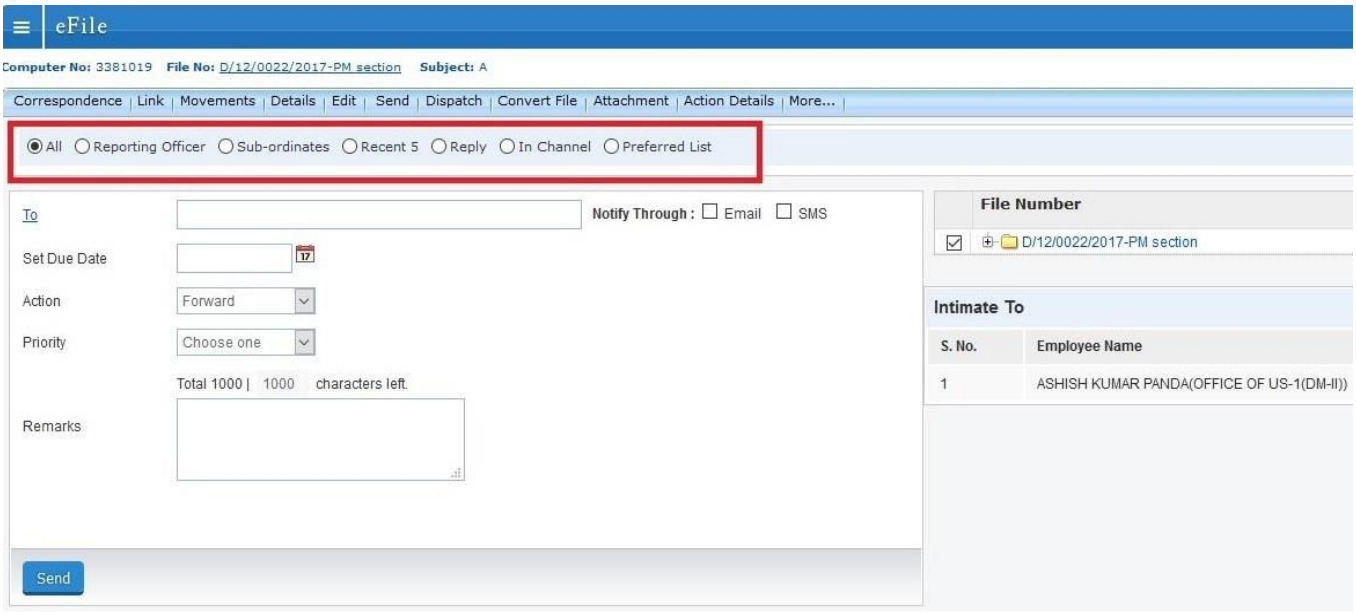
9. View Draft

10. Attach File

11. Attach Receipt

SEND

User can use this option to send the receipt to the intended recipient. When sending the receipt we can get a list of all the contacts if we click on 'to', and we can create a preferred list (contacts used frequently), as well as groups.



There are number of options when sending a receipt including :

- ❖ 'CC' option can be used if user wants to mark a copy of receipt to other users as well
- ❖ Set Due date for the receipt using the calendar link. It is the due date by which we expect the work on the file to be completed.
- ❖ Action which has been taken on the receipt from the dropdown menu.
- ❖ Set the Priority of the receipt from the dropdown menu as immediate, most immediate etc.
- ❖ Type Remarks in the Remarks text box.
- ❖ Different types of recipients have been categorized for easy searching and quick sending of receipt.

☞ *When a receipt is sent it moves to the sent folder of the sender and inbox of the receiver.*

ACKNOWLEDGEMENT

Acknowledgement acknowledges the user that department has received the letter sent by him/her and user can use the Acknowledgement no to track the status of the letter at any point of time. Acknowledgments will be sent both electronically (email & SMS) and physically (through post).

By default, acknowledgment will be sent through eMail/SMS notification, once letter is entered into the system. If required, user can create the acknowledgements using the pre-defined templates. The system will maintain the record of all the acknowledgements sent to the user(s).

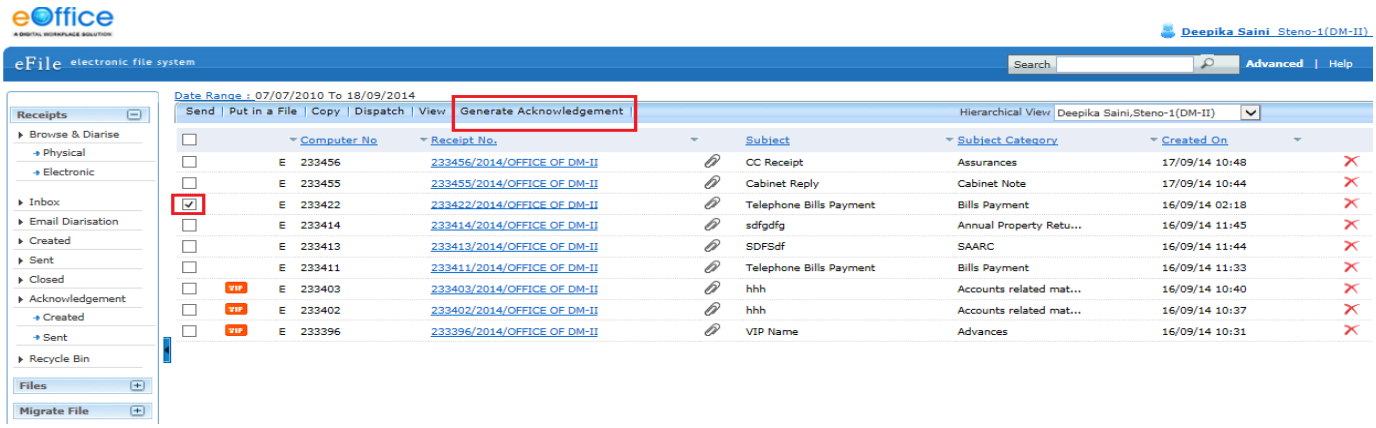
Users can Generate Acknowledgement from:

- Browse and Diarise Generate page
- Created section
- Sent section

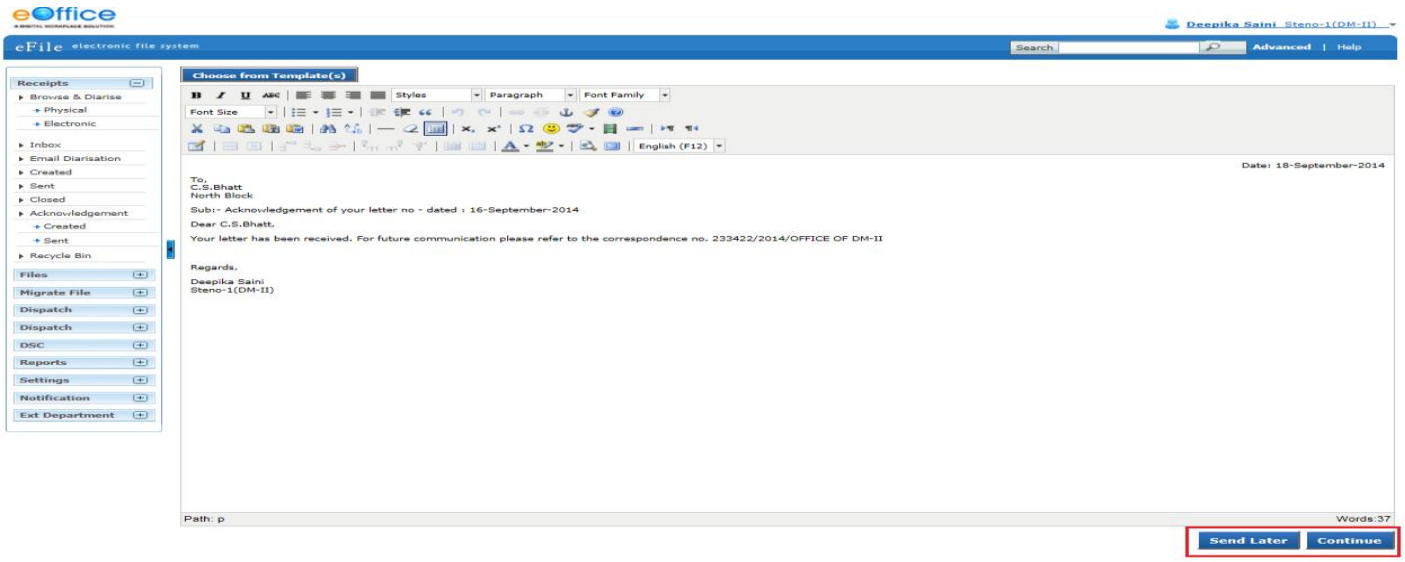
By using this option the user who is diarizing the document can generate an acknowledgement and send it back to the sender of the document as an acknowledgement.

To create an acknowledgement

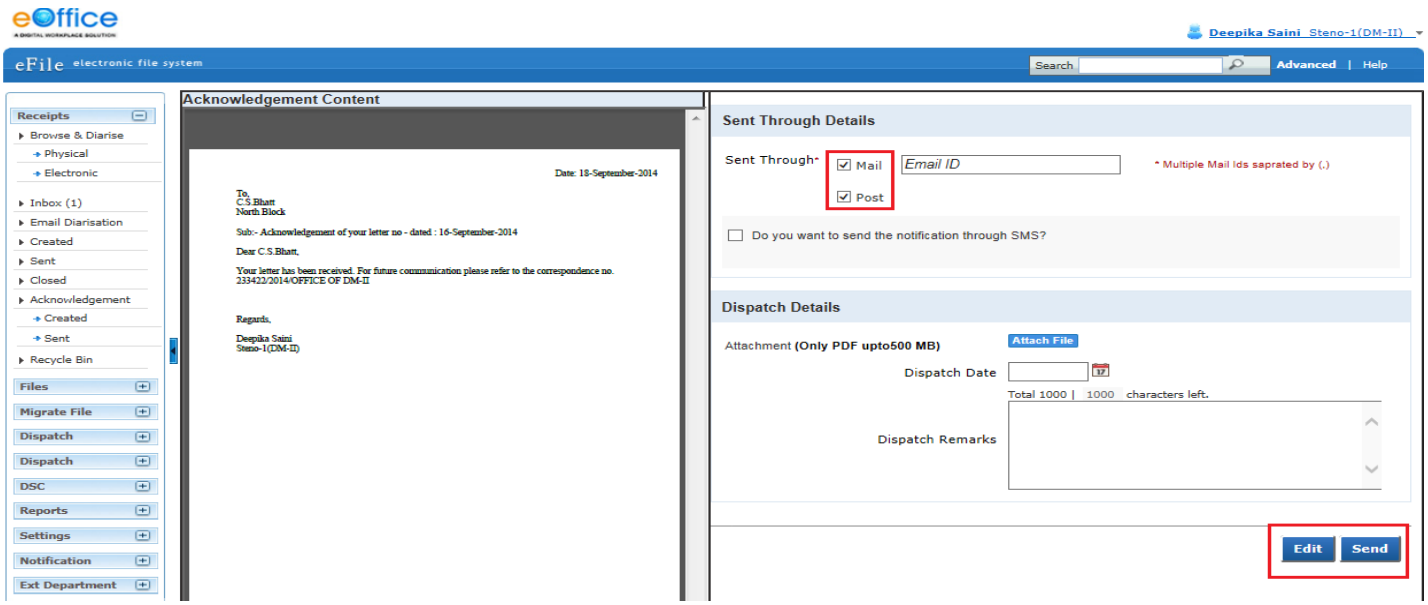
- Go to **Receipt ->Sent**
- Click on "Generate Acknowledgement"



- After clicking on Generate Acknowledgement, an editable window gets opened where a prefilled template of the acknowledgement is displayed prefilled and user can also edit the content of the template.
- User after clicking on Send Later button moves the acknowledgment to Created sub-section under Acknowledgement section.



- Clicking on Continue button will take the user to the send page of acknowledgment.



- After filling the required sent details, the acknowledgment is then sent to the concerned user and an entry will be available in users Sent subsection in Acknowledgement section.

In a user unchecks Customize acknowledgement, acknowledgement will automatically be sent by the system if mobile number and email is filled in receipts metadata.

If user wants to Cutomize an acknowledgement then he can do so by checking the customize acknowledgement.

Customize acknowledgement is a feature to customize the default acknowledgement which will be sent to the person who has sent the letter. By default receipt number is sent to the sender, but it can be customized further.

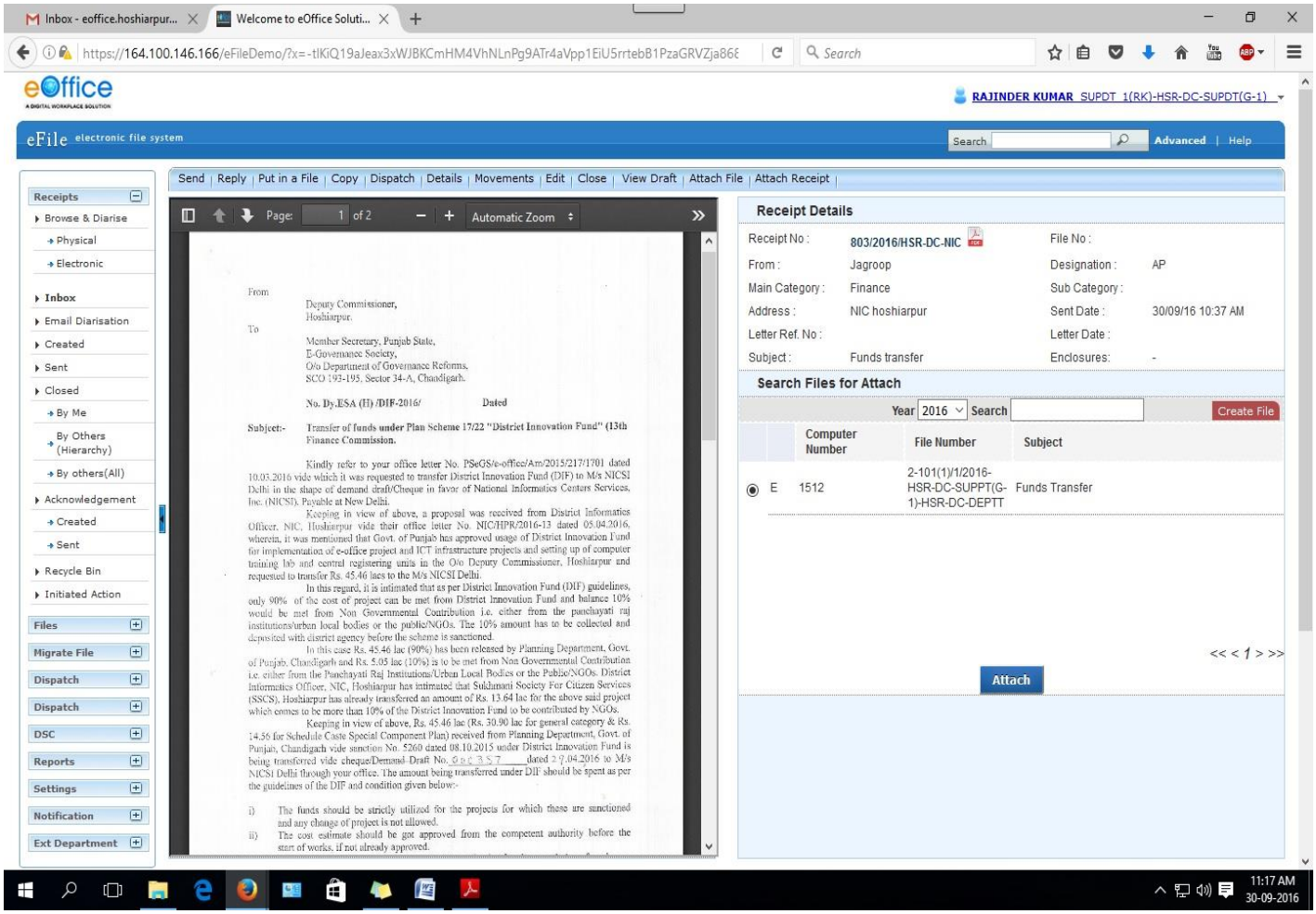
To **view** an acknowledgement

- Go to Acknowledgement under Receipts section in the left hand menu.
- Select the receipt for which acknowledgement needs to be sent.
- Click the ByPost link, a pdf will be generated.
- User can now save or open the Pdf.

REPLY: Send receipt back to from it came.

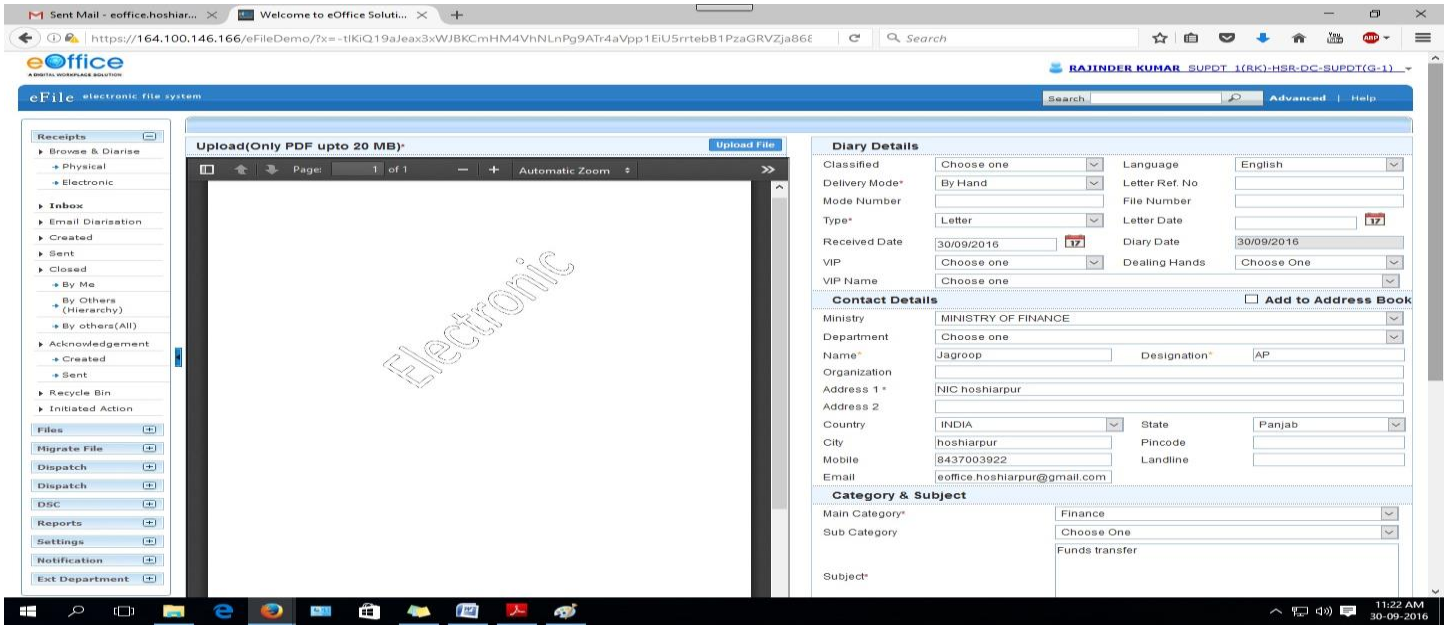
PUT IN A FILE: Puts Receipt under a file, select file and click attach. These files are ones which are present in created and inbox folders.

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



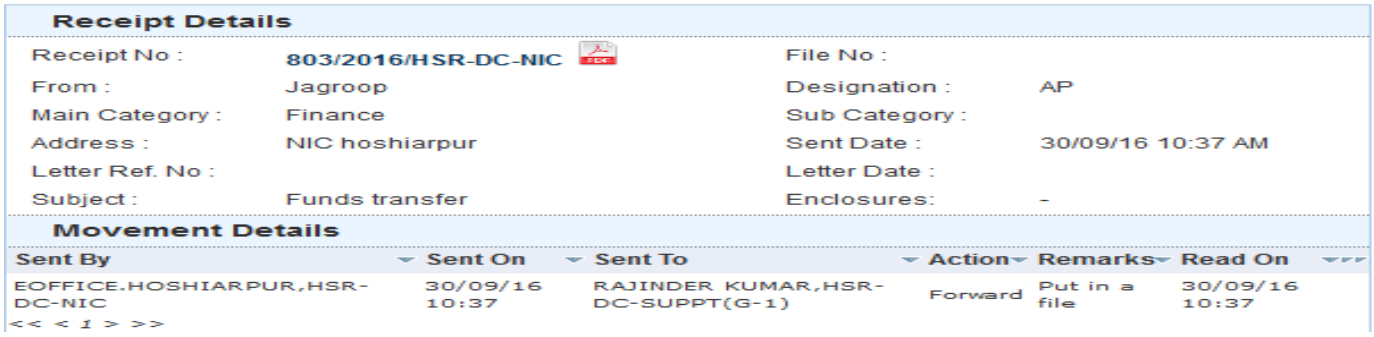
COPY

Copy the metadata fields of the receipt; it is used in case multiple correspondences are received from same person.



DETAILS AND MOVEMENTS

User can use this option to view the details of the generated receipts such as dispatch history, Referenced files and referenced receipts and track the movements of the receipt which automatically gets updated as receipt moves further.



Receipt Details

Receipt No :	803/2016/HSR-DC-NIC	File No :	
From :	Jagroop	Designation :	AP
Main Category :	Finance	Sub Category :	
Address :	NIC hoshiarpur	Sent Date :	30/09/16 10:37 AM
Letter Ref. No :		Letter Date :	
Subject :	Funds transfer	Enclosures:	-

Movement Details

Sent By	Sent On	Sent To	Action	Remarks	Read On
EOFFICE.HOSHIARPUR,HSR-DC-NIC	30/09/16 10:37	RAJINDER KUMAR,HSR-DC-SUPPT(G-1)	Forward	Put in a file	30/09/16 10:37

<< < 1 > >>

EDIT

User can use this option to edit the Metadata fields of the Receipt before sending it to the intended recipient.

To edit the generated receipt, user has to perform following steps:

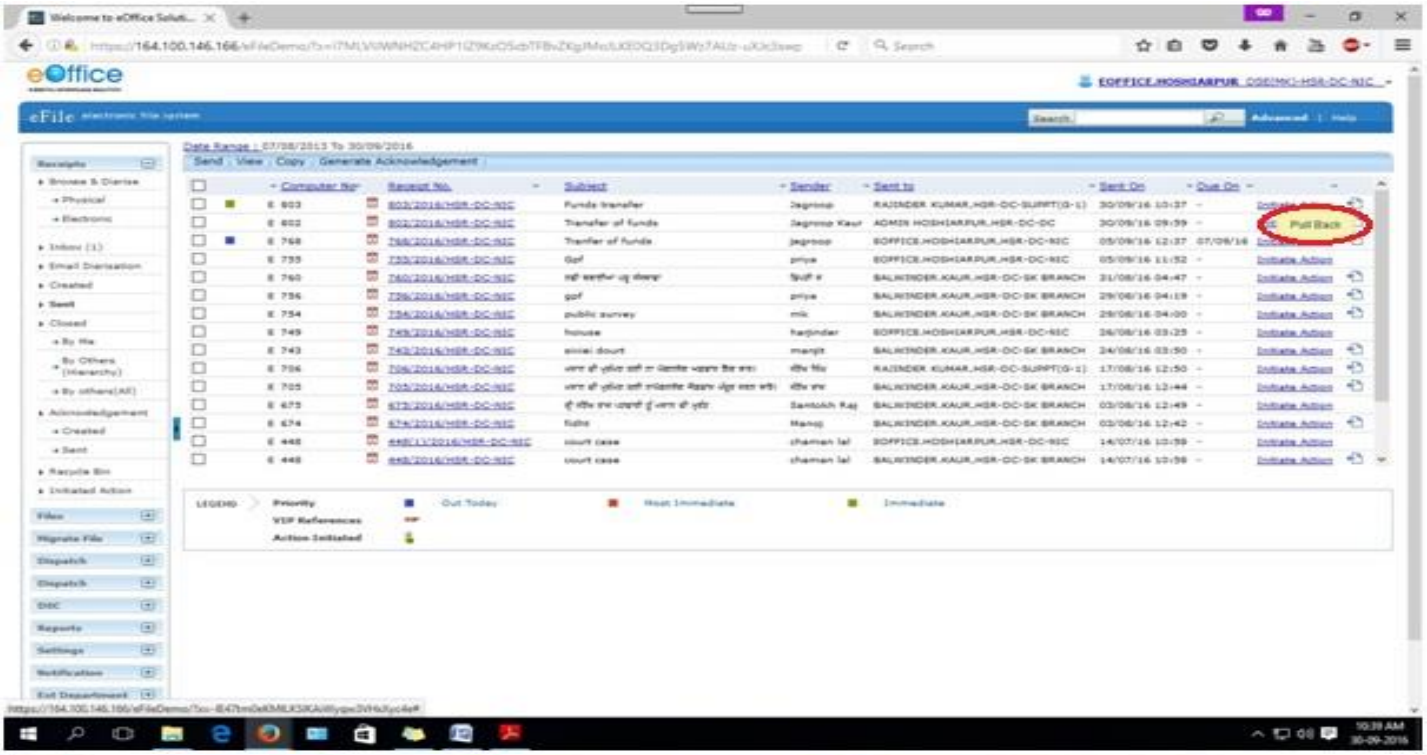
- Click the edit link, as a result the metadata fields get active
- After marking required changes in metadata fields, click save button to save metadata

PULL BACK

User can also Pull Back the sent receipt from the intended recipient even when the receipt is in the Inbox of the recipient, using the Pull Back link available in Sent section of Receipt.

Pull back can be used if a receipt is marked to a wrong person or if person is on leave etc.

- *Pull back can only work till the time receipt is unread.*



PULL UP

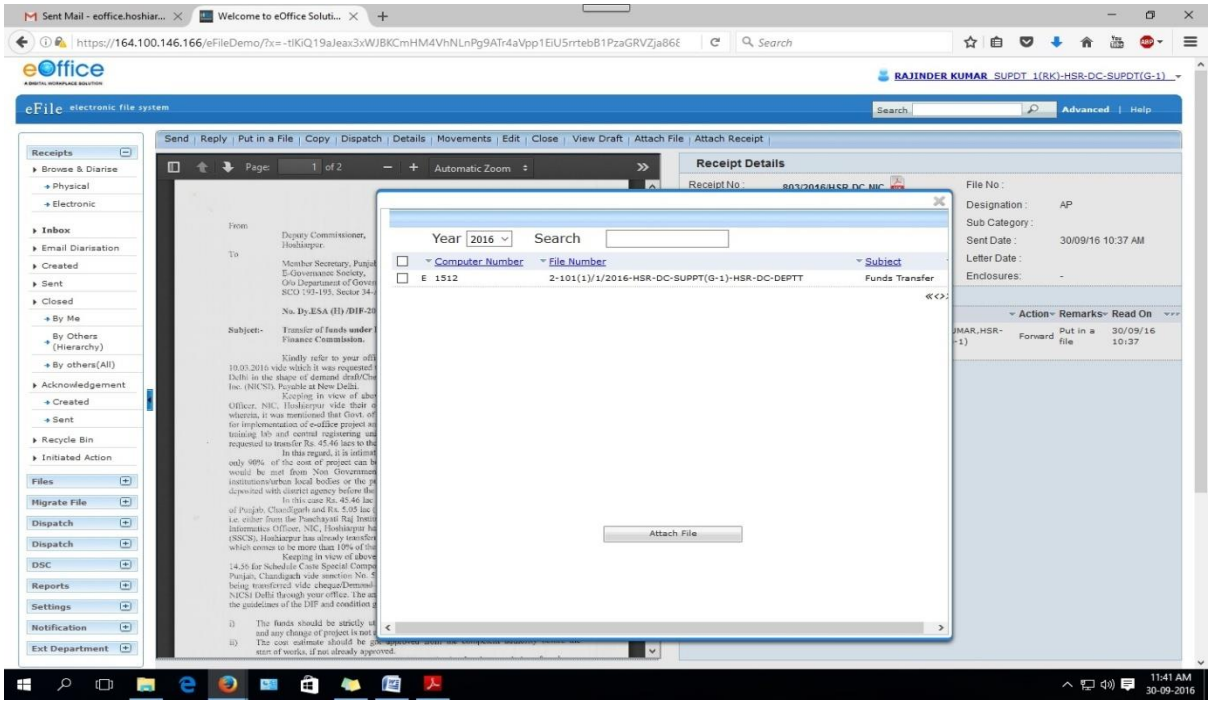
There is one more option called pull up which can be used by persons in upper hierarchy to forcibly pull in case of an urgent matter or if a person is on leave.

- Go to hierarchical view
- Click on the user you want to see files of
- Next, click on pull up option at the end of a file to pull the file to your inbox

- *The green box marks the priority of the receipt as Immediate*
- *Blue box under remarks there are remarks, red box means no remarks*

ATTACH FILE

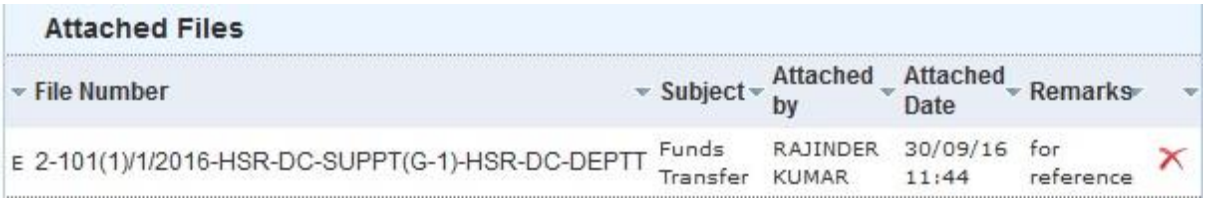
To attach a receipt with a file, this option can be used.



Select the file from the list or it can be searched from year and search fields and click on attach file. Now this file moves along with the movement of the receipt.

DETACH FILE

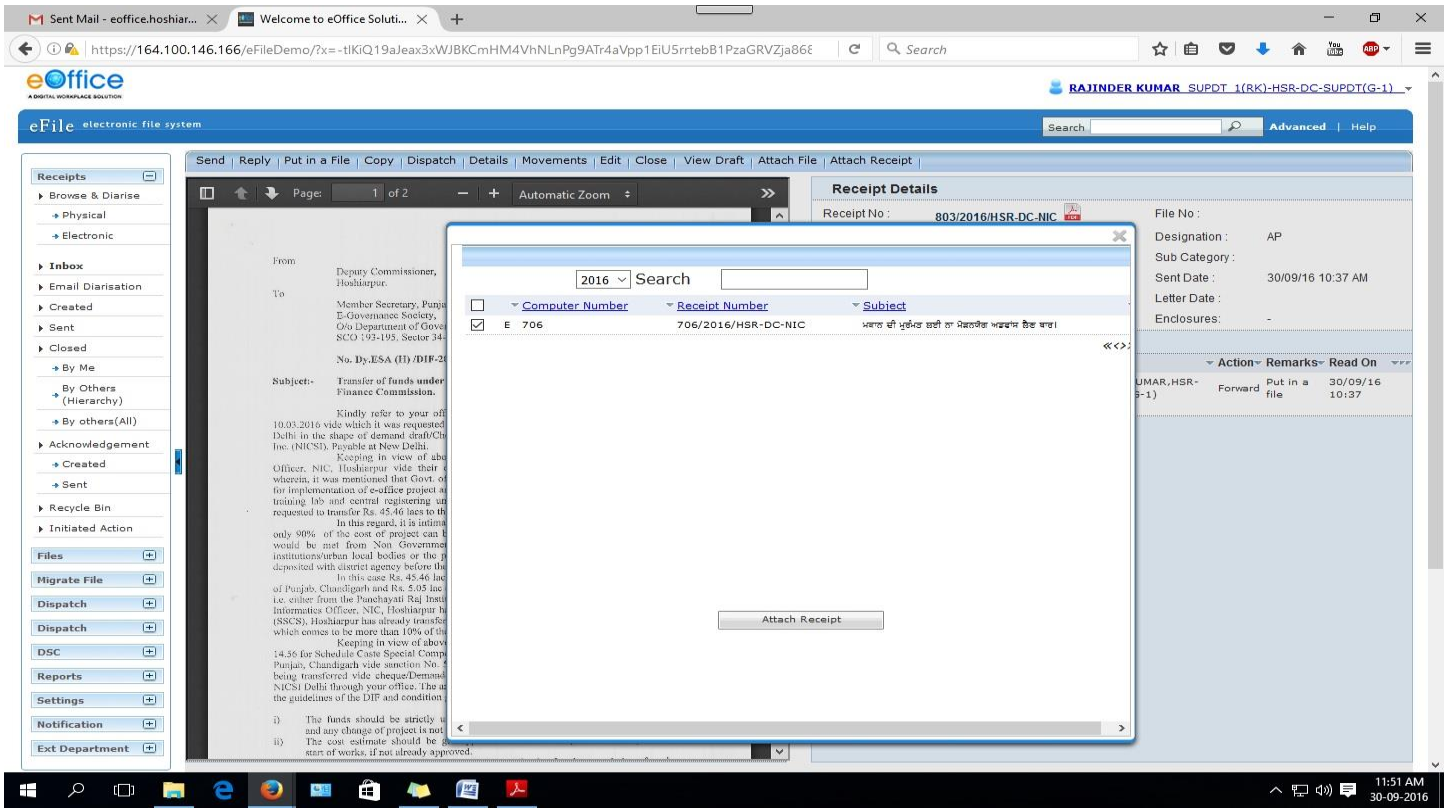
User can also detach file attached with a receipt using



The detached file then moves to the users file inbox who had detached the file.

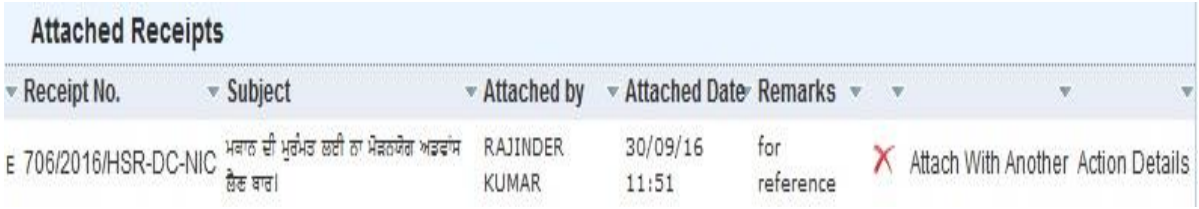
ATTACH RECEIPT

User can use this option to attach the working receipt with the other Receipt.



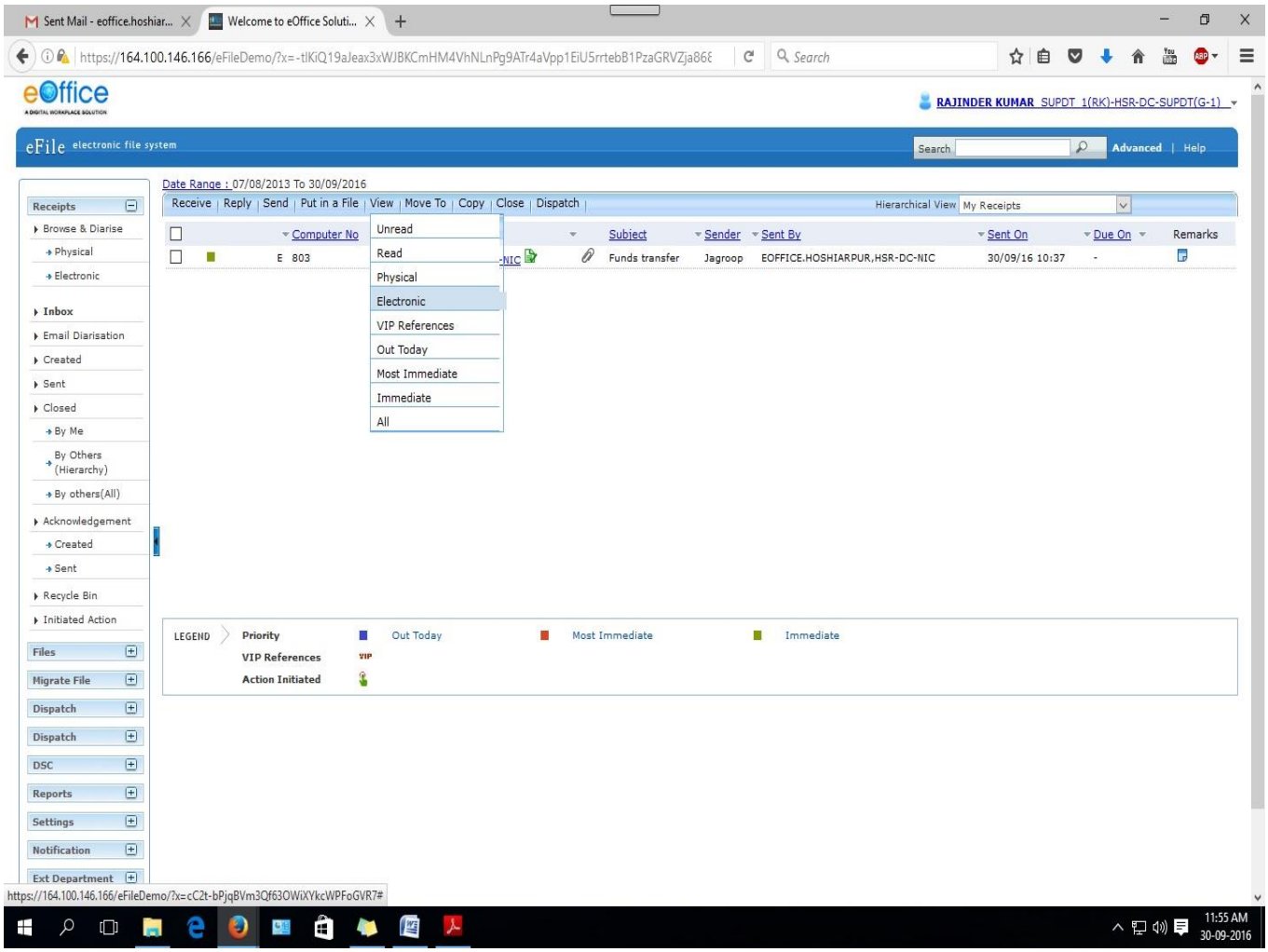
DETACH RECEIPT

User can detach an attached receipt from the details section of the receipt.



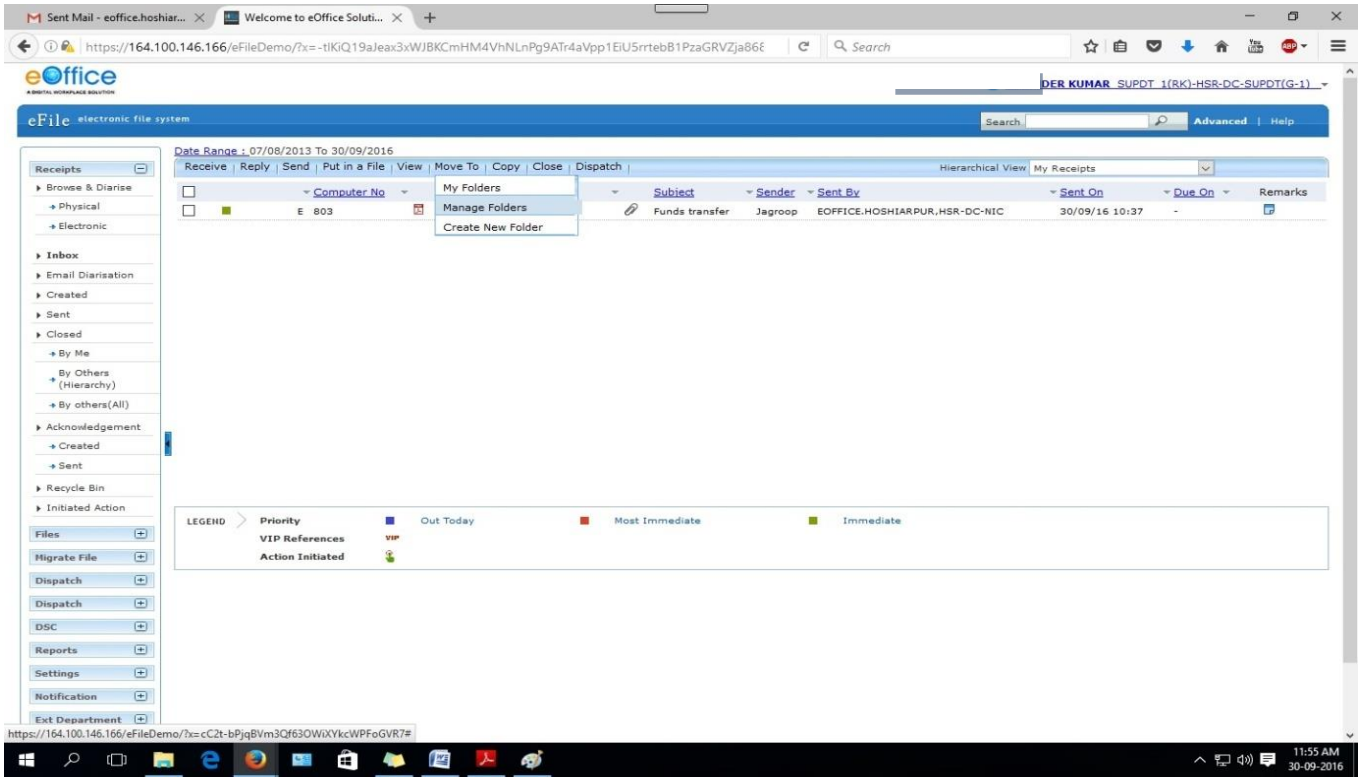
VIEW

There are number of filters available to view the receipts like, Unread, Read, Physical, Electronic, VIP references, Out today, Most immediate, Immediate, All.



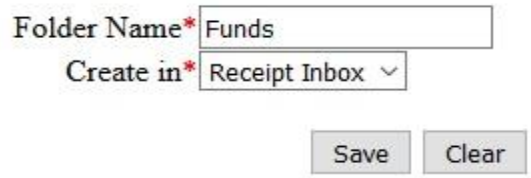
MOVE TO

This option can be used to move receipt to a particular folder. Also user can create new folder, manage existing folders etc.



Manage Folders link from the dropdown menu to **Delete** or **Edit** the folders created under Receipt Inbox.

Create New Folder link from the dropdown menu to create a new folder under Receipt inbox.



DISPATCH

User can use this option to dispatch the electronic receipt. To dispatch the electronic receipt, user has to perform the following steps:

- Click the dispatch link, as a result the confirm message box will appear, to move the generated receipt to the inbox for dispatching.

- After confirming, while dispatching from inbox section, choose the 'Reply Type', 'Nature of Reply' and other required fields and click the save button to send for further approval process.

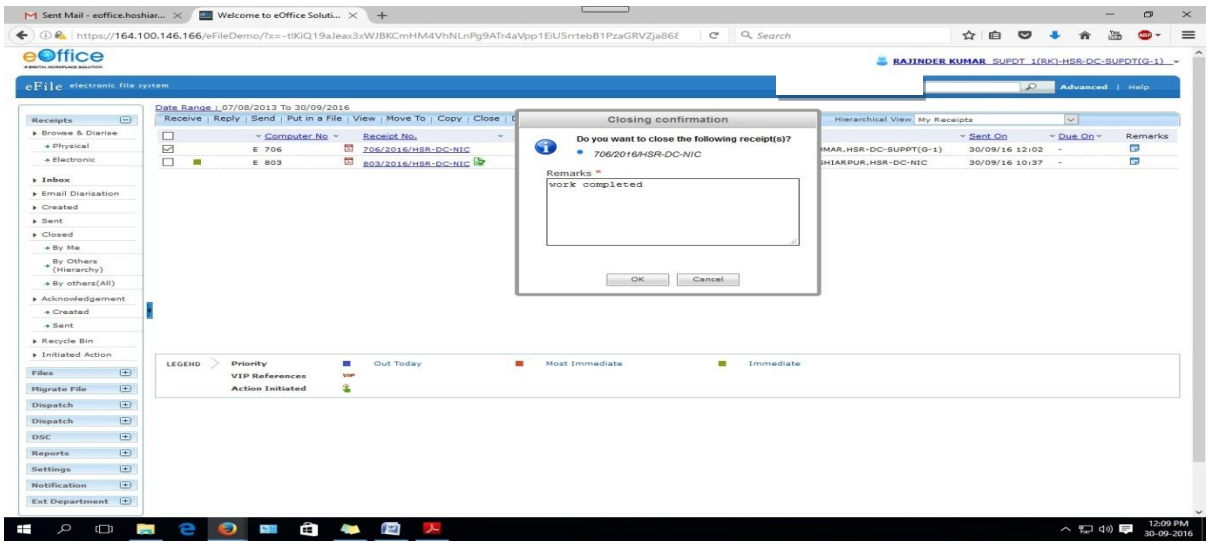
☞ *No file should be attached to the receipt while dispatching of same receipt.*

CLOSE

This option can be used to close a receipt. There can be number of reasons for closing receipts:

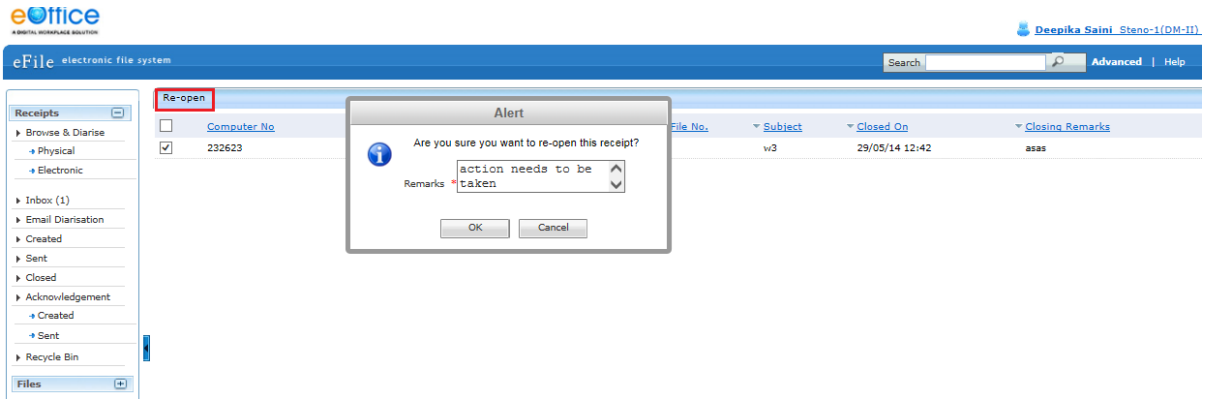
- Receipt is just for information purpose
- Task has been completed
- When further action is not required on receipt

To close a receipt, select the receipt and then click on close in top menu. Enter the remarks and click the OK button.



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

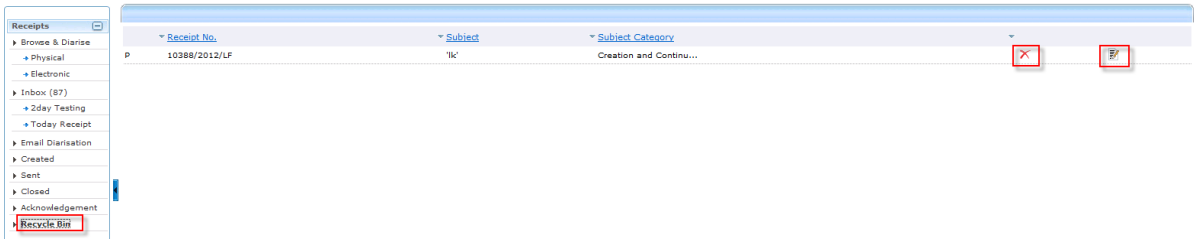
User can re-open the closed receipt anytime by clicking the re-open tab.



RECYCLE BIN

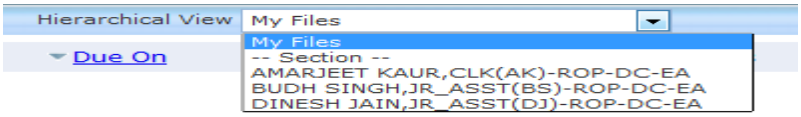
Recycle Bin option contains list of all the receipts which are deleted from the "**Created**" section of receipts. There are **2** Quick Actions provided under Recycle Bin Section of receipt:

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



HIERARCHICAL VIEW

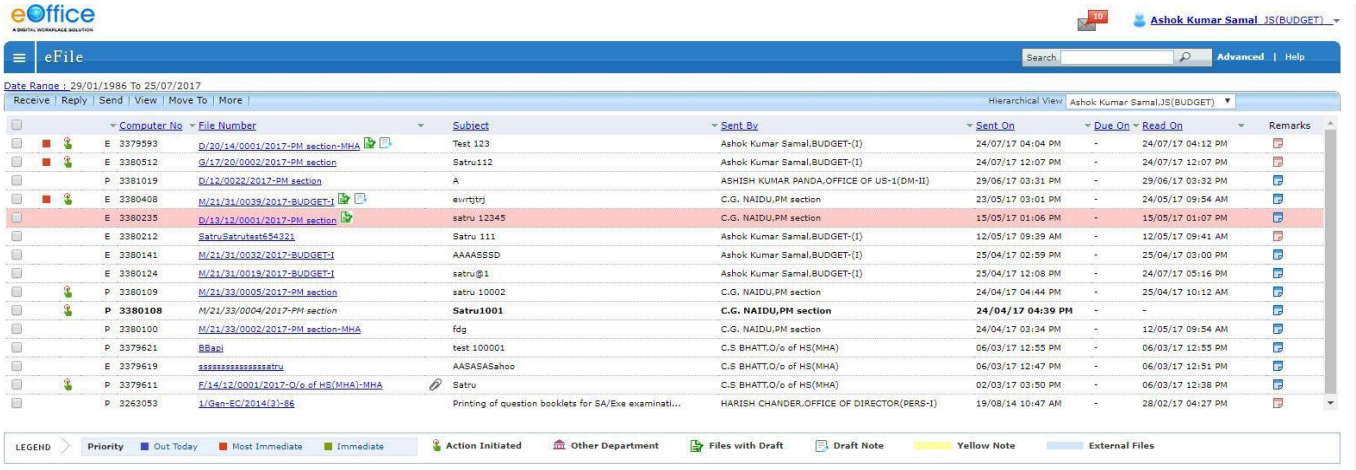
This view facilitates the user to view their own files and receipts as well as files/receipts of users of their section/branch.



NEW FEATURES

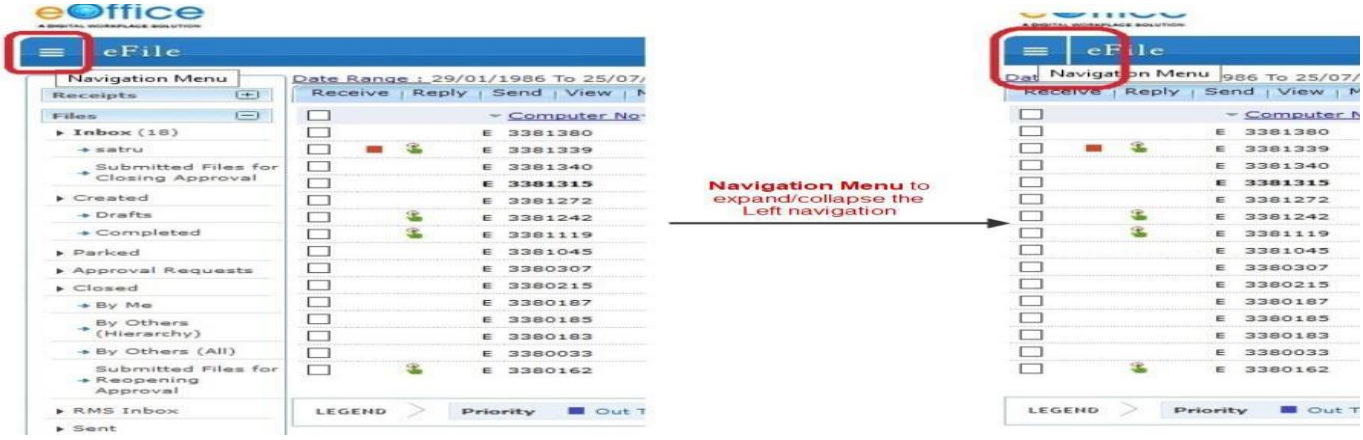
Full Screen View

Whenever user clicks on any file from a list page, the respective file will be displayed in full screen mode and the navigation panel will remain collapsed. Whenever user takes any action and redirect again to any list page, the navigation menu on left panel will be automatically expanded to normal view.



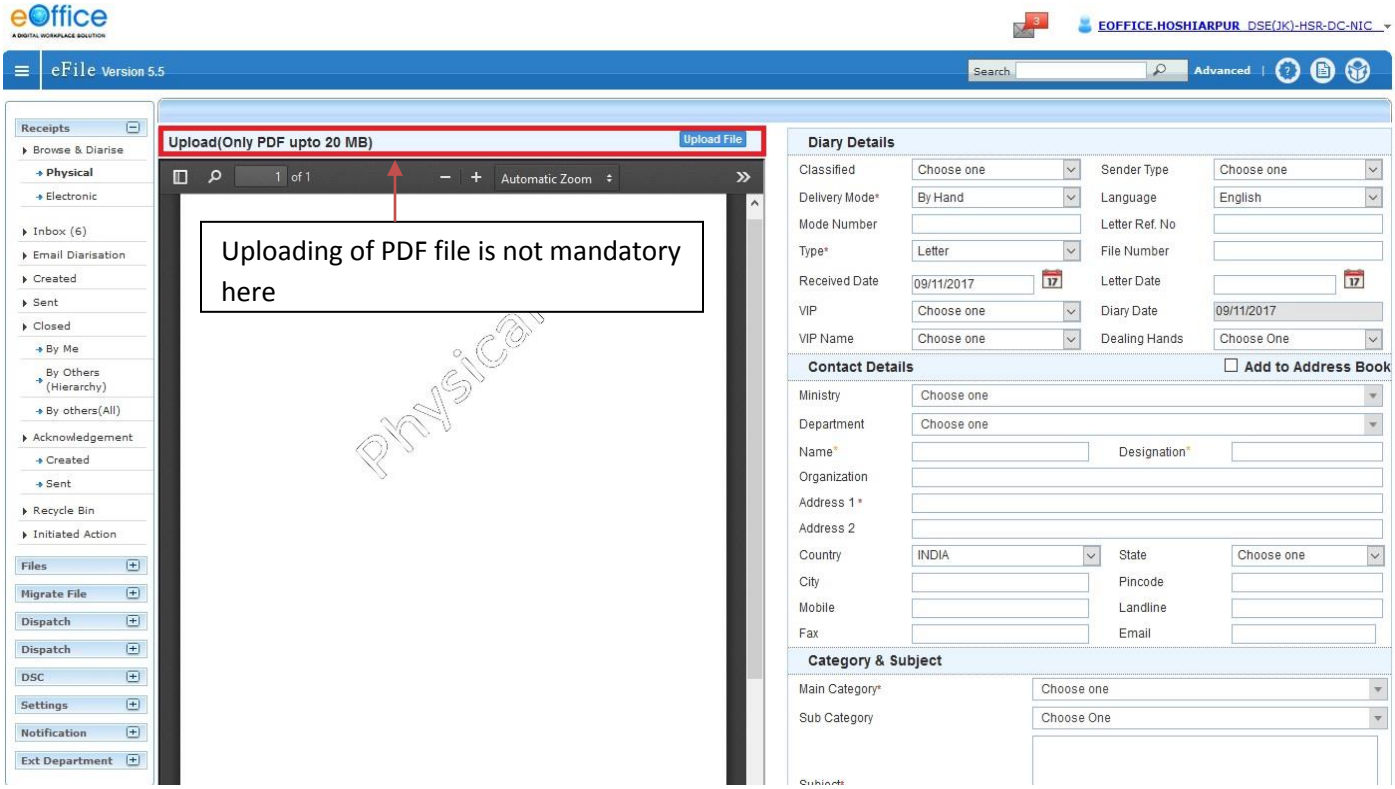
Expand/Collapse navigation menu

A provision has been made to expand or collapse the navigation menu with the help of a navigation menu icon.



PHYSICAL RECEIPTS

Physical receipts can also be used similarly to electronic receipts but the difference in physical and electronic receipt is that uploading of PDF file in not mandatory in physical receipts. So physical receipts are just used for tracking purpose.

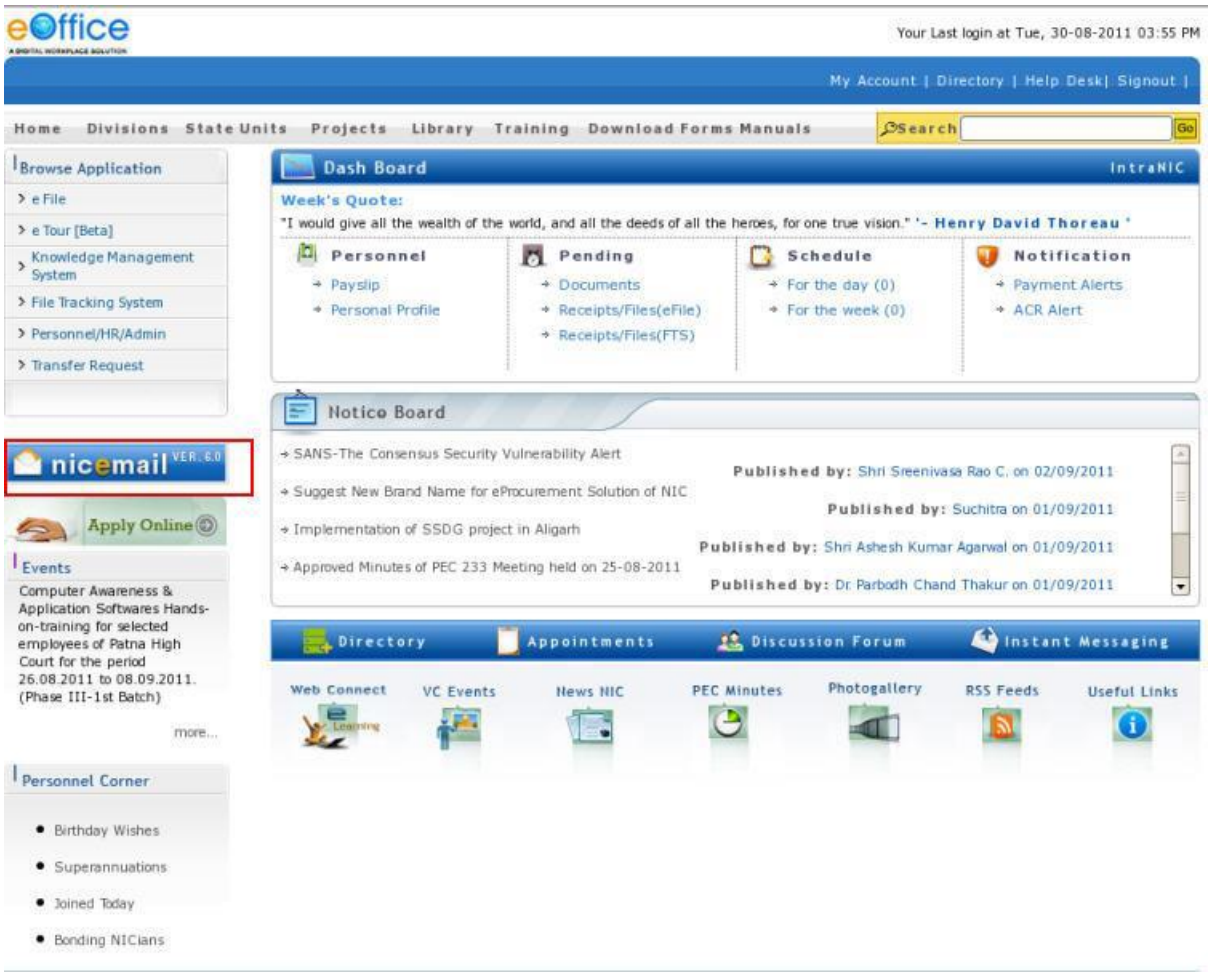


EMAIL DIARIZATION

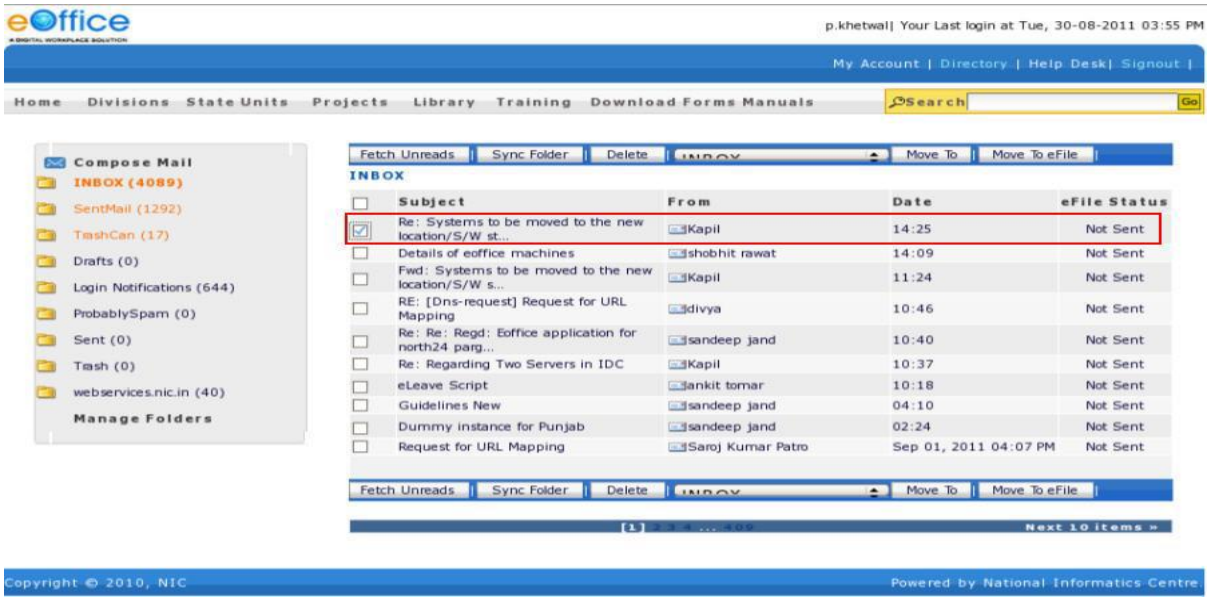
During Email Diarisation, email should have been sent to the efile from NIC Email. User should select the email from NIC Email inbox and Select option Move To eFile button.

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

1. Click the NIC email link, as a result NIC mail opens

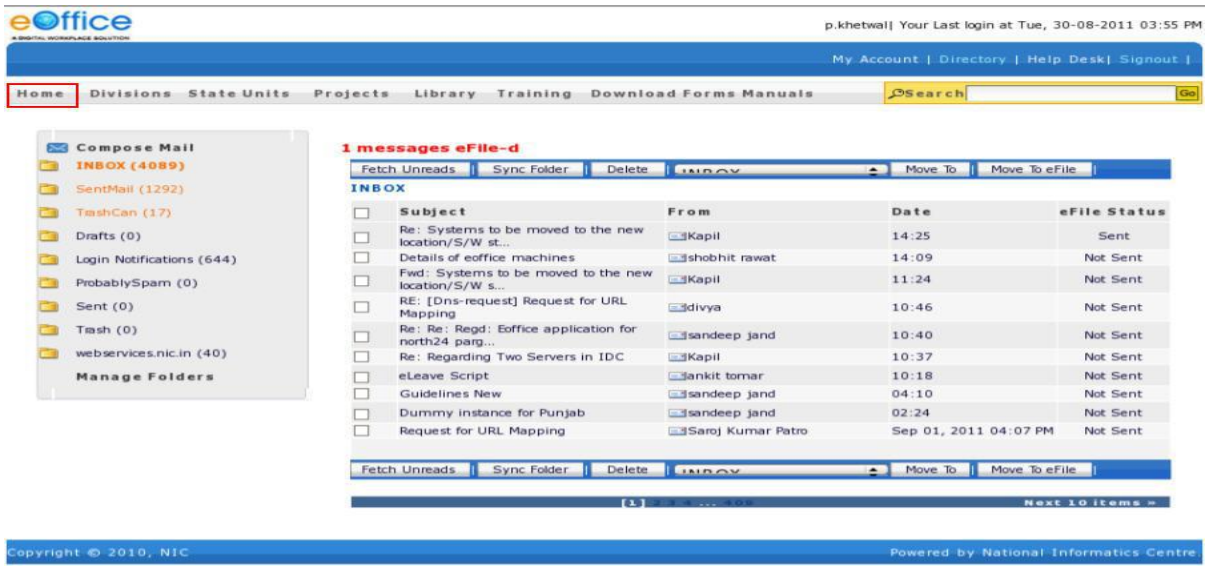


2. Select the Receipt which needs to be moved to eFile Application



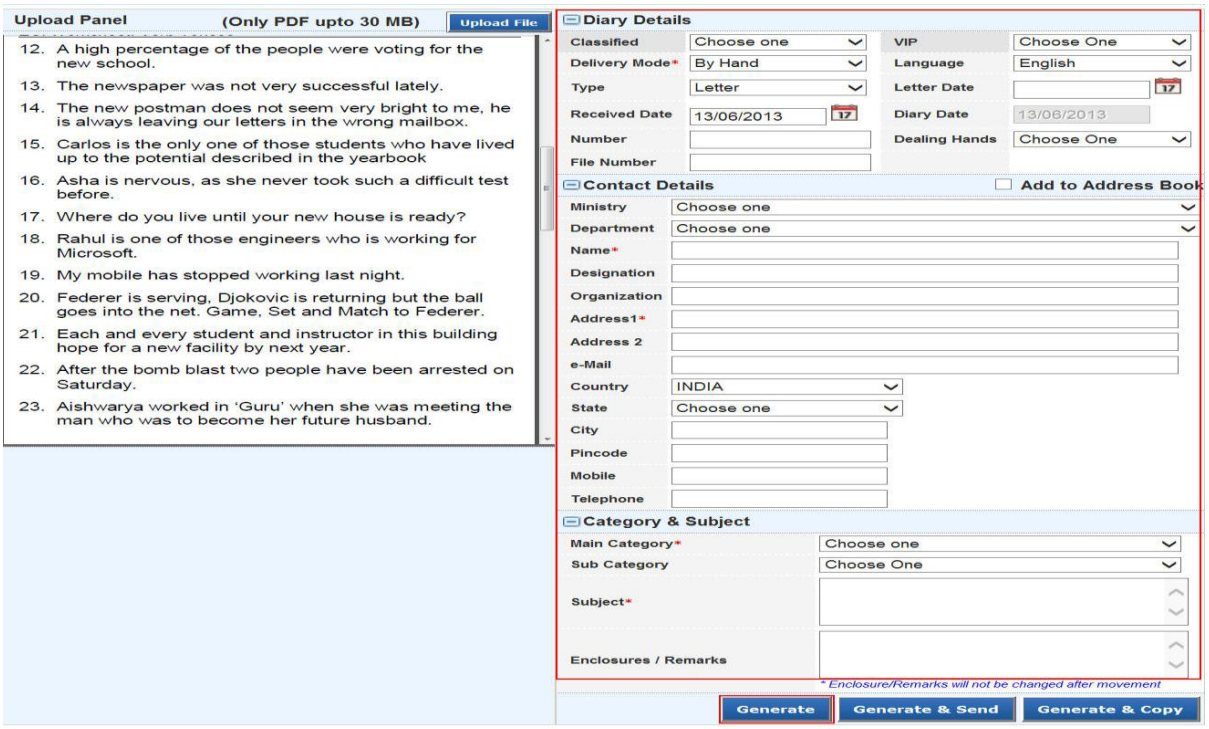
3. Click the Move To eFile button to move the selected receipt to eFile application, as a result, sent message appears at top

4. Click the Home Button to move to the Home Page of eOffice Portal, as a result home page of eOffice portal appears



5. Click the eFile Link to move into eFile Application, as a result, eFile application opens

6. Click the Email Diarisation link and then click the moved receipt from the NIC email Section to diarise it, As a result, Diarisation page appears



FILES

A file is a collection of related records which compromises of receipts, noting, drafts, references and linked files. There are two types of files:

- Physical
- Electronic

There are two types of file systems:

SFS and Non-SFS

SFS	Non-SFS
1) User is able to enter file no. without any restriction or standards.	1) The user has to select the available heads for the nomenclature of File.
2) File Numbers are created in free flow.	2) File heads are created in standardized format.
3) Standards are not fixed at State level, Files no's are created in free flow.	3) Standards are fixed at state level.
4) Primary, Secondary, Tertiary Heads are not Available.	4) Primary, Secondary, Tertiary heads are available.

SFS stands for single File System. In this, you have to type manually file Heads (i.e. File No).
Example - A-11012/1/2016

Non SFS stands for Non Single File System. In this, only you have to select File heads from dropdown list. Also here file head is divided into 4 heads like-
Basic Head Primary Head Secondary Head Tertiary Head

Let's take look at how file system work:

Creating new file

- Go to file management system
- From the files menu, select Create New (Non-SFS) under electronic tab as we are working with electronic files

Attach Correspondence / Reference to the file

- Attach correspondence / receipts with the working file
- Attach references corresponding to the file

Add Noting

- Noting can be added to file. There are two types of notes
- Green Note: Permanent note
- Yello Note: Temporary note

Send File

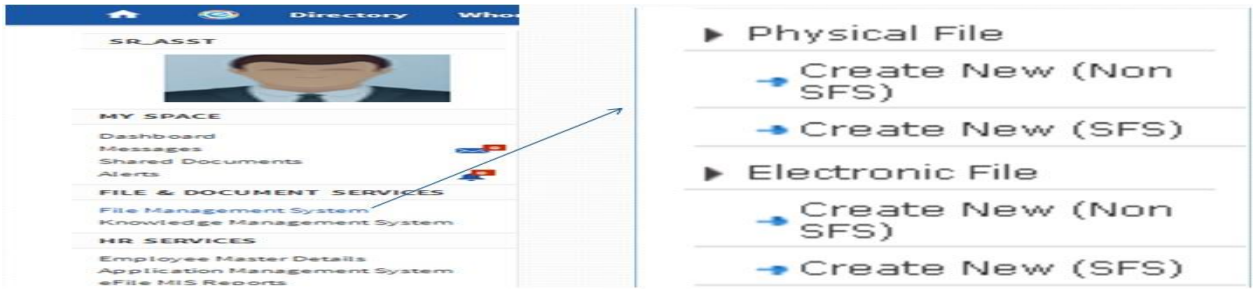
- Send the file to other eOffice user depending upon the requirement

Detail and Movements

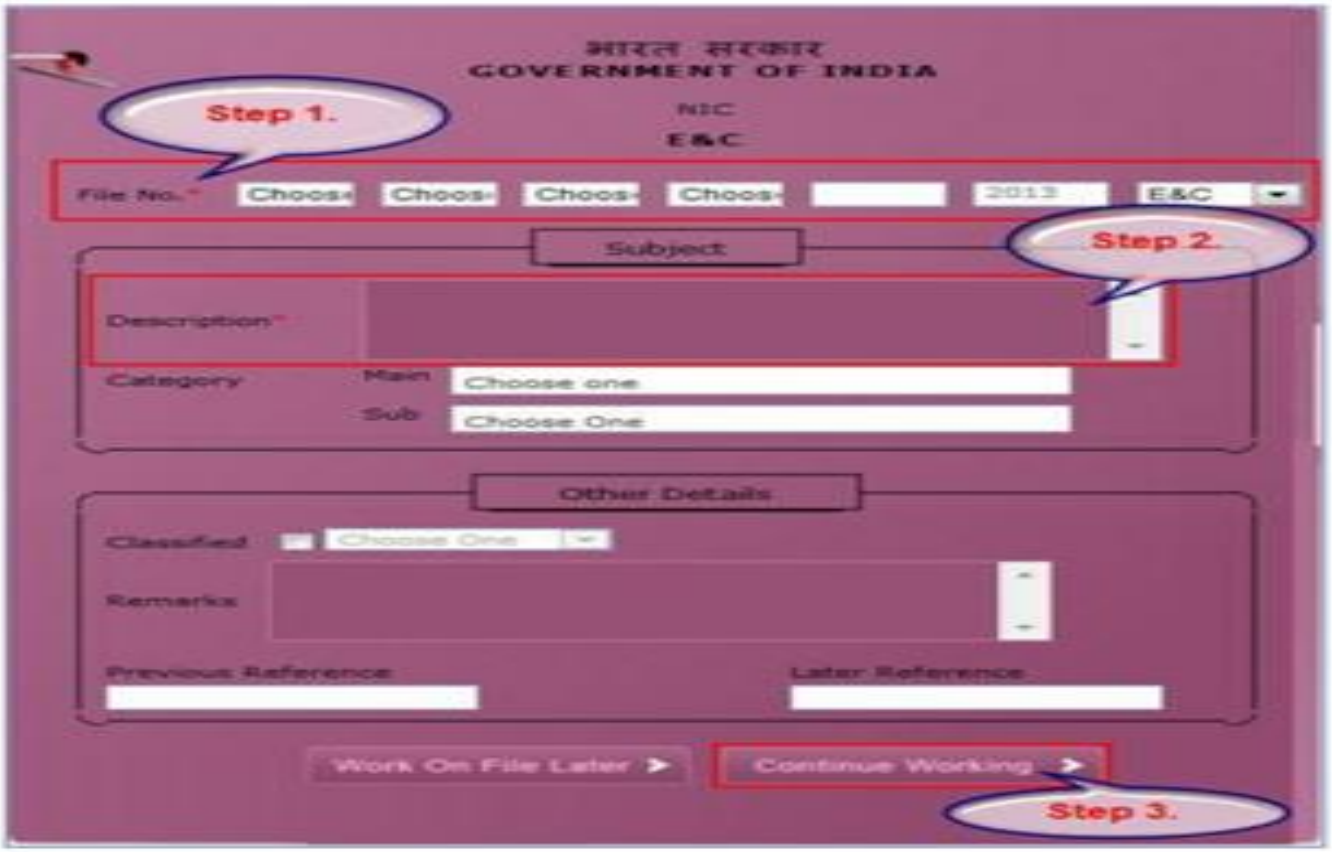
- After sending the file, user can see the details of the file as well as movements of the file

CREATING A NEW FILE

- Open file management system
- From the files menu, select Electronic file
- Select Create New (Non-SFS)



As a result, User will get following screen

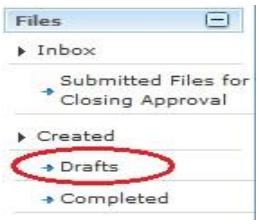


Now there are two options at the end

- Work on file later
- Continue working

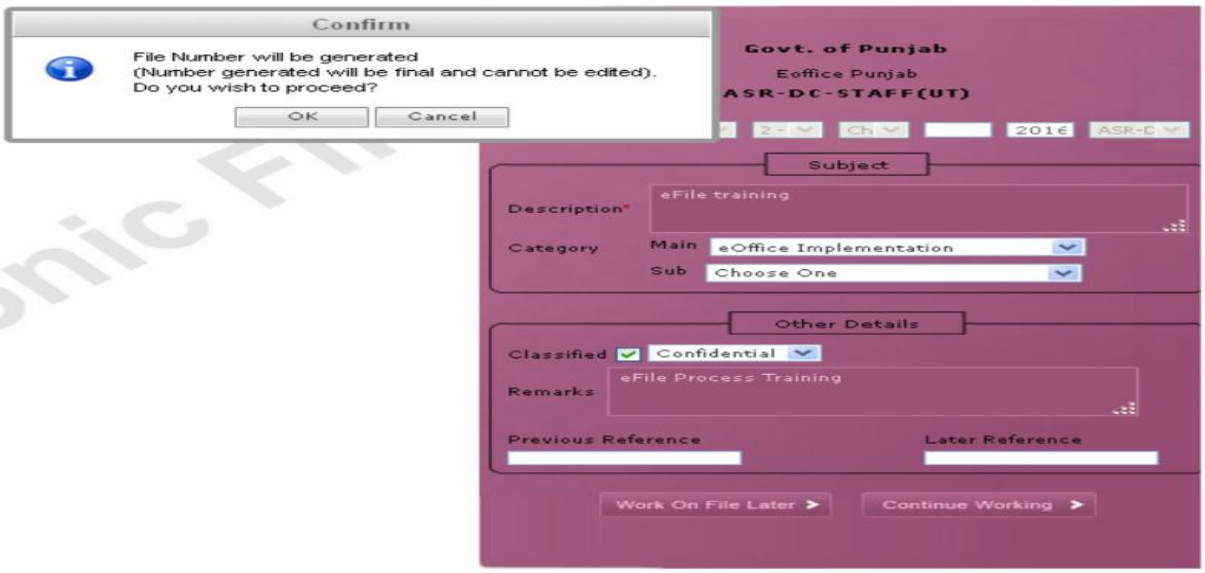
WORK ON FILE LATER

If you choose to work on file later, file number is not generated. File is saved in Created-drafts folder, since a file number is not yet assigned user can delete it, once a file number is generated it cannot be deleted.

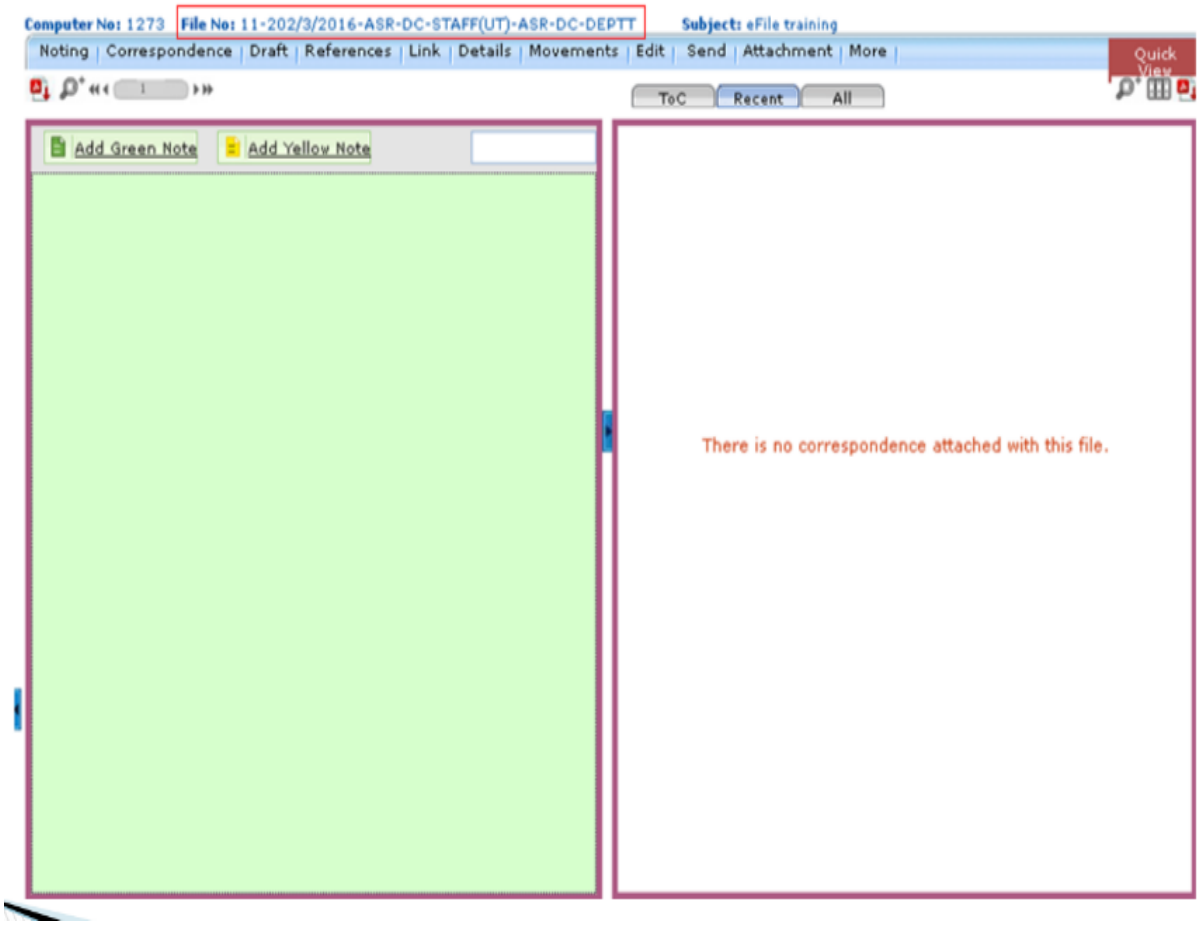


CONTINUE WORKING

If you click on continue working file number is generated, and a confirm dialog box appears.



This is the Screen that user gets when a new file is created, at the top is the file number, left side is the noting side and right side is the correspondence side.



When a file is created the next step is to add correspondence, reference and noting in a file. After that the file is sent to another eOffice user depending on the requirement. After a file is sent, user can see the details and movements of the file. Now let's discuss all these options in detail.

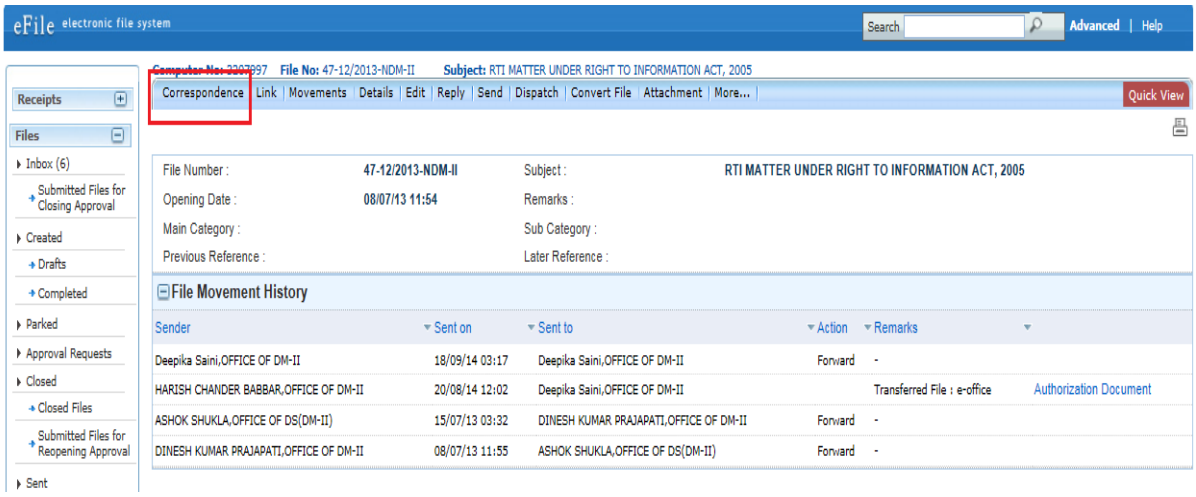
1. How to add correspondence to a file
2. How to add references to a file
3. How to add noting to a file
4. How to send a file
5. How to see the detail and movements

HOW TO ADD CORRESPONDENCE

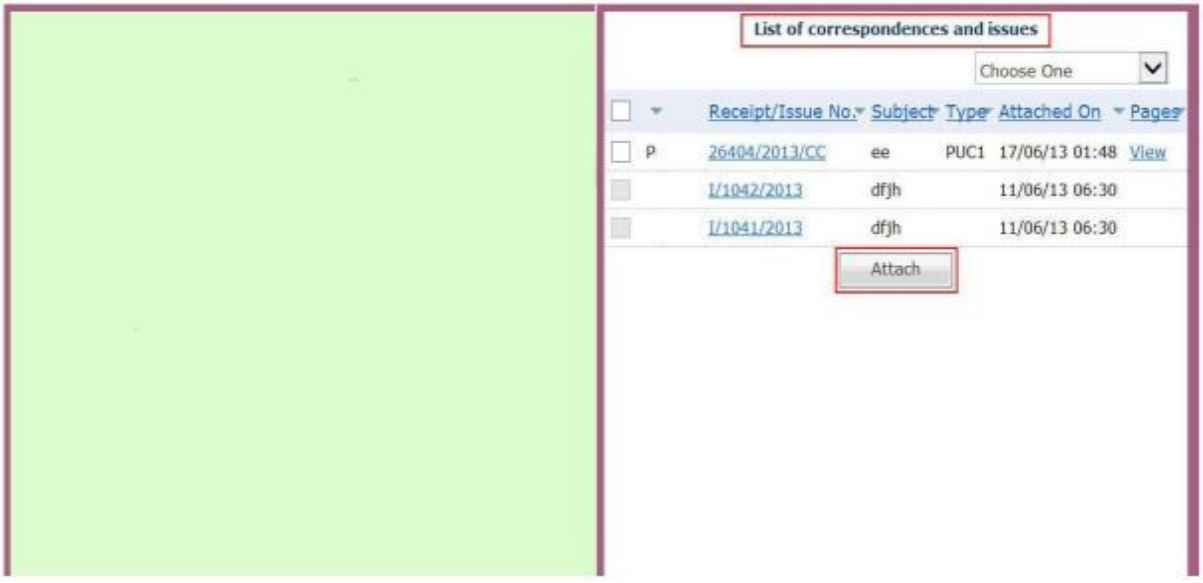
With the help of this feature user can attach physical Correspondence/ Receipt to the Working File.

To attach Correspondence user has to perform following steps:

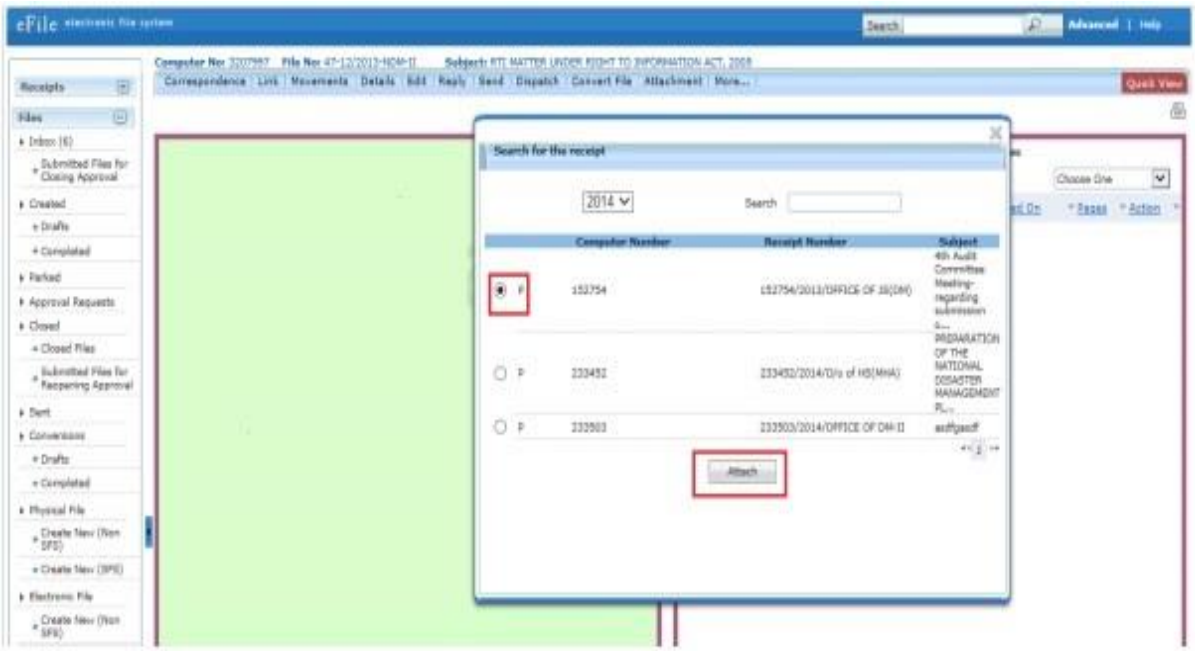
1. Click the Correspondence link



2. As a result List of Correspondences and Issues page appears on right side of noting page

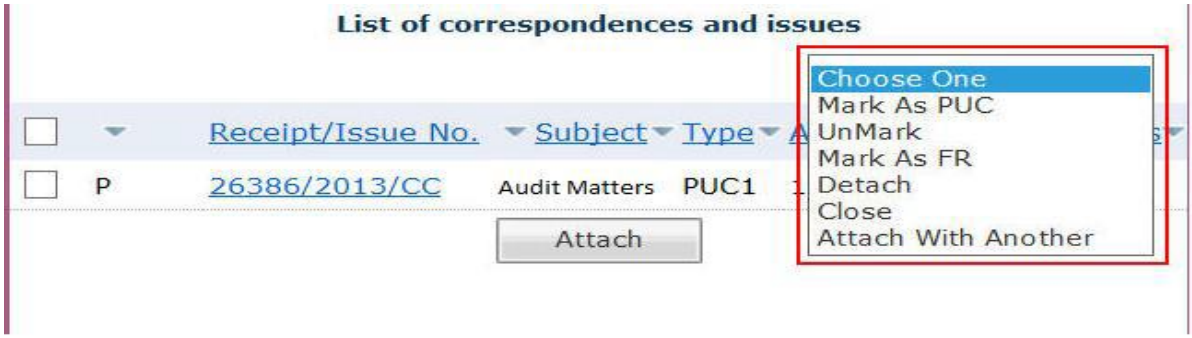


3. Click the Attach to add a new receipt to the list, as a result, the Receipt Search window appears showing a list of available receipts. Select the receipt from the Receipt Search window to attach with the file



4. After selecting the receipt, click the Attach button. As a result, the receipt gets attached to the file

Type of the receipt can be changed from the dropdown menu available at the top of List of Correspondences and Issues page



Mark as PUC: This option helps the user to mark the receipt as Paper under Consideration (PUC).

To mark a receipt as Paper under Consideration (PUC) user has to perform following steps:

1. Select the receipt from the List of Correspondences and issues which needs to be marked as PUC

☞ *By default the first receipt attached to a file is marked as PUC1 (Paper under Consideration)*.

Unmark: This option helps the user to unmark the receipt, if it is marked as PUC or FR.

To unmark an already marked receipt user has to perform following steps:

1. Select the receipt from the List of Correspondences and Issues which needs to be Unmarked.

Select the type as Unmark from the dropdown menu.

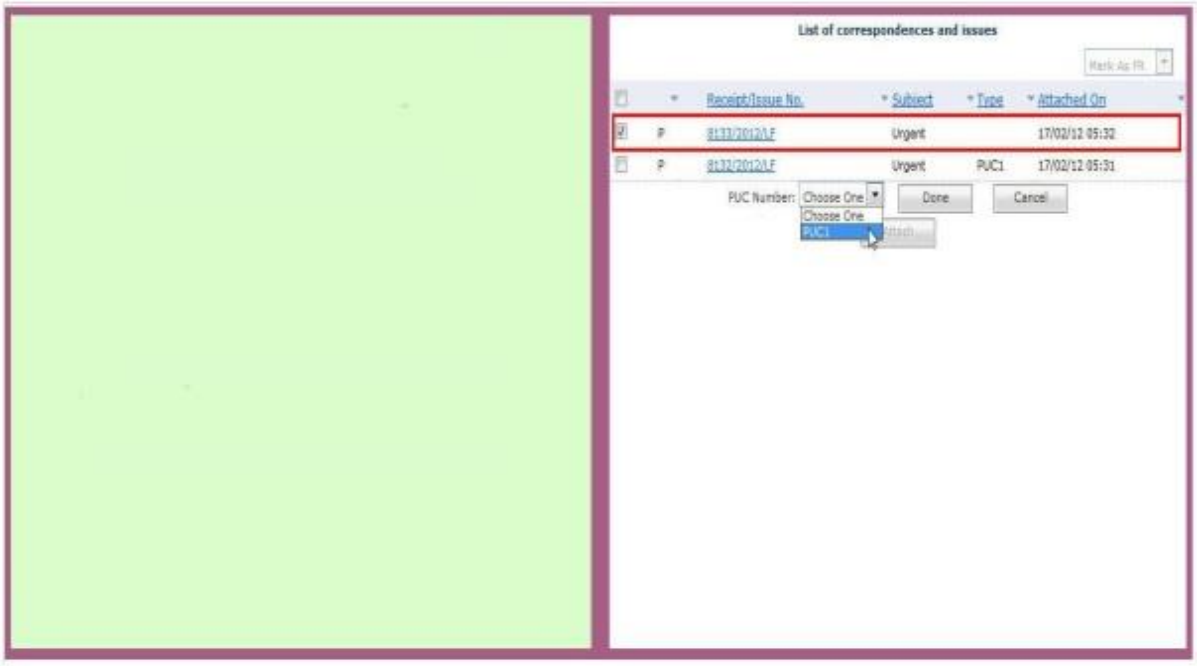
Mark as FR: This option helps the user to mark the receipt as Fresh Receipt (FR).

To mark a receipt as Fresh Receipt (FR) user has to perform following steps:

1. Select the receipt from the List of Correspondences and issues which needs to be marked as FR

2. Select the type as FR from the dropdown menu

3. Then, select the PUC Number from the dropdown menu



4. Click the ‘Done’ () button, as a result the receipt gets marked as FR

DETACH

This option helps the user to Delete/Detach the attached receipt from List of Correspondences and issues.

- *If the user detaches a receipt which is marked as PUC then its related FR’s will be unmarked. (Only the initiator of the file can detach the receipts).*

To detach a receipt, user has to perform following steps:

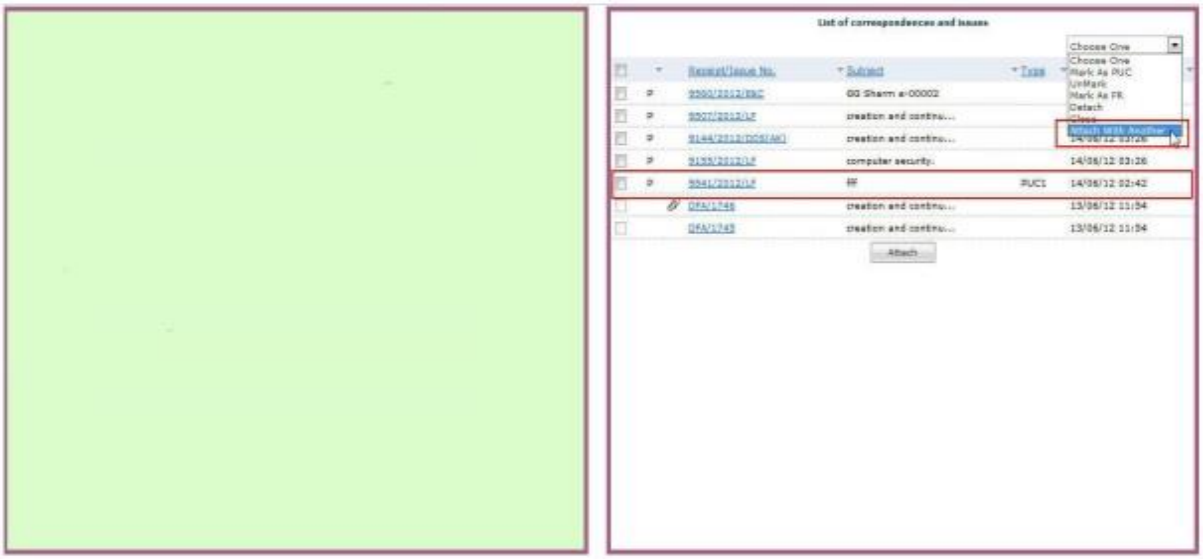
1. Select the receipt from the TOC of Correspondences which needs to be detached.
2. Select the type as Detach from the dropdown menu.

ATTACH WITH ANOTHER

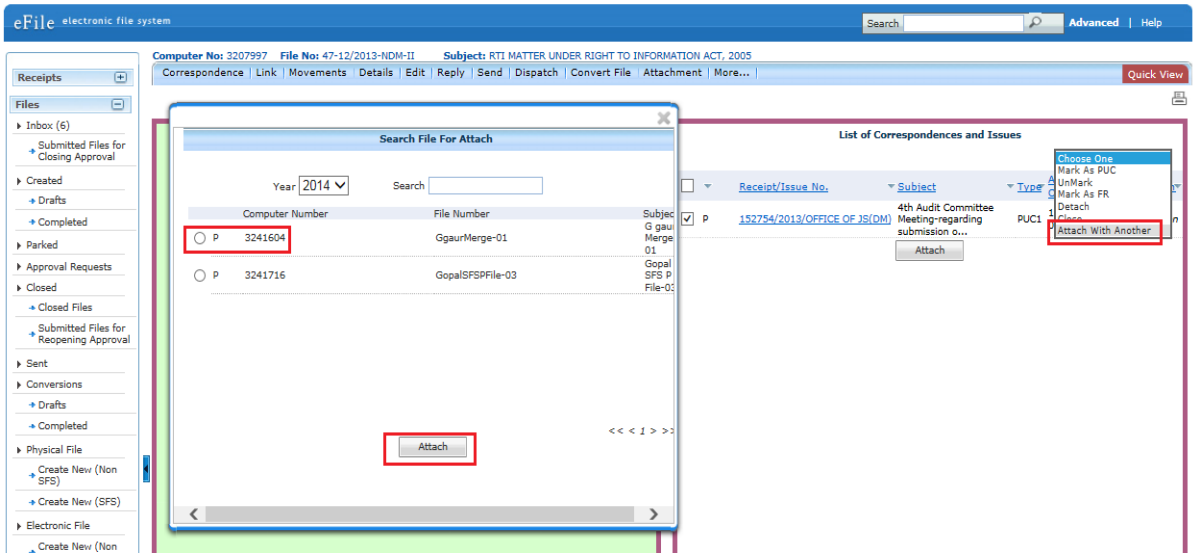
This option helps the user to attach the already merged receipt to another File.

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

1. Select the receipt which needs to be put in another File and select the ‘Attach with Another’ option from the dropdown



2. As a result list of Files will appears. Select the file in which receipt needs to get attached and click the ‘Attach’ button, as a result receipt will get detached from the current file and get attached to the selected file.



LINK

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

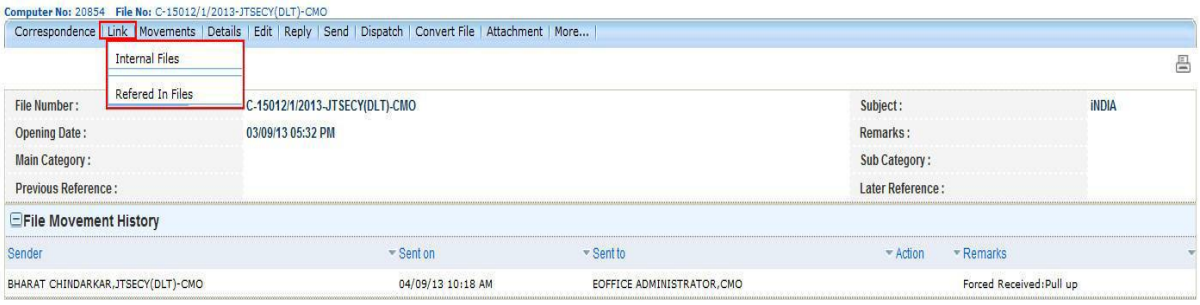
It contains 3 sub links:

Internal Files: This sub link helps the user to link/delink any other file from within the Organization.

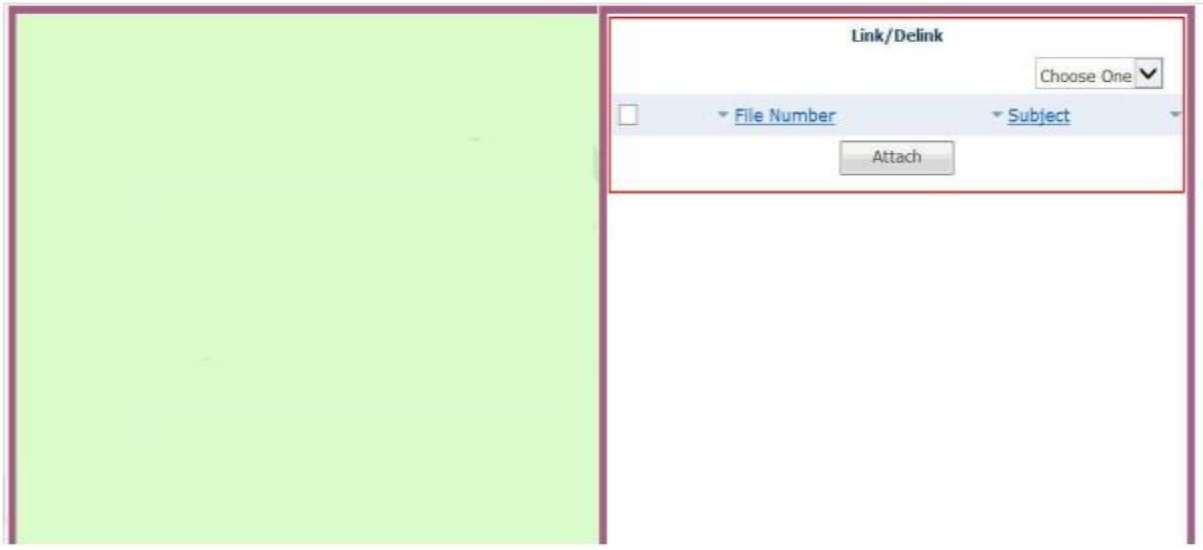
Referred In Files: This sub link helps the user to view other Files that are linked from some other Organization with the working file.

To link with other File, user performs the following:

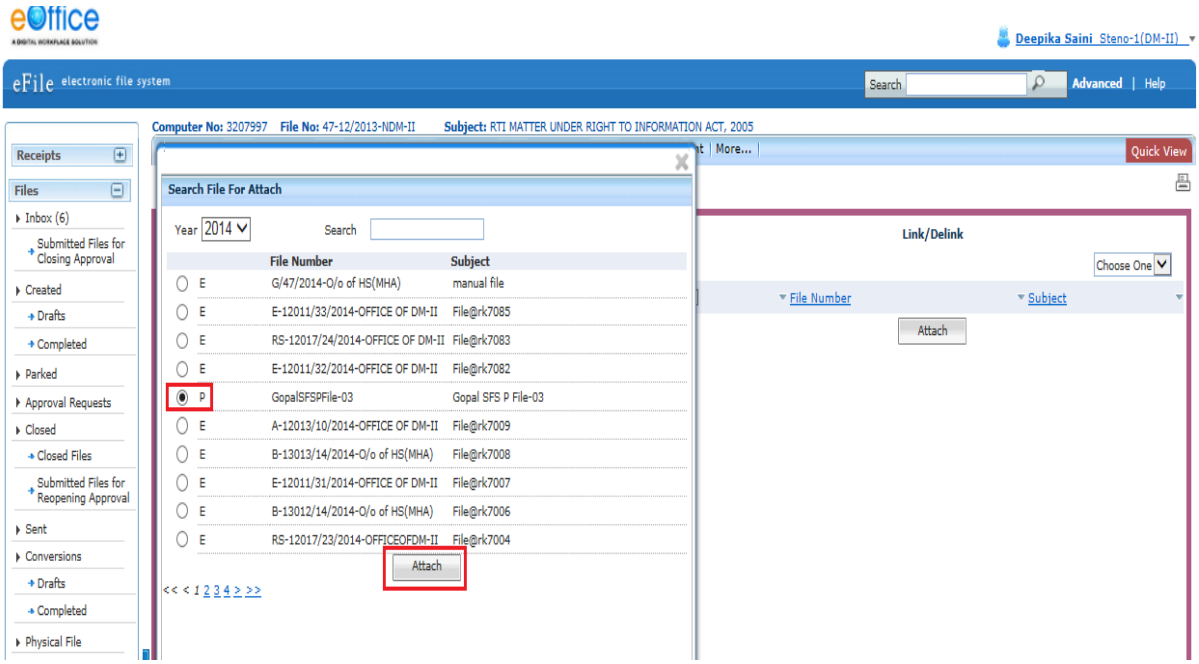
1. Move the cursor on Link, and click the Internal Files () link



2. As a result Link/Delink page appears on right side. Click the Attach () button



3. As a result, the File Search Window appears. Select the file from the File Search window to attach with the file and click the Attach button, as a result the selected file gets linked with the working file



LINK/ATTACH

Receipts/files can be attached to this file using two options

- Attach
- Link

But there are two differences in these two options:

Attach	Link
Original file is attached and sent	Copy of the file is attached , but original file remains with the owner
If user has attached a file anyone can detach a file	If user links a file no one except the user can delink it

HOW TO ADD REFERENCE

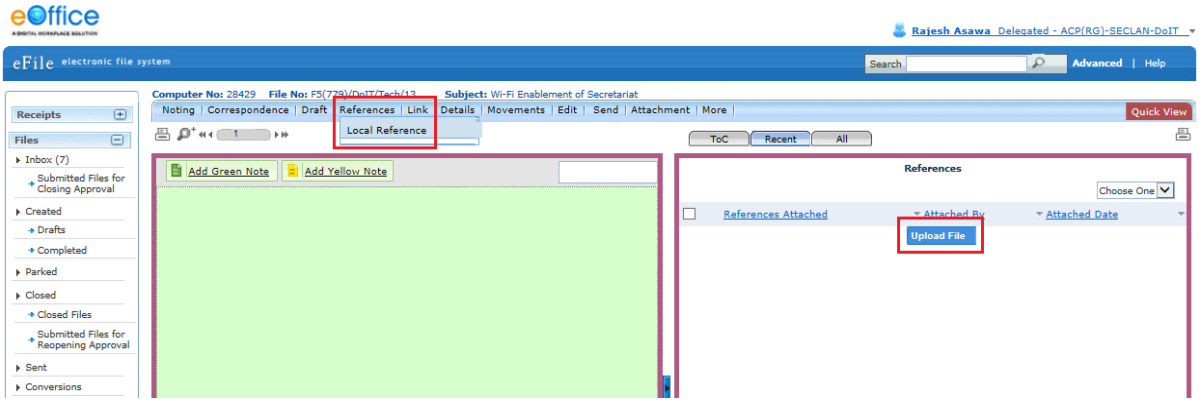
With the help of this feature user can attach references corresponding to the working file.

This link consists of 1 sub-links:

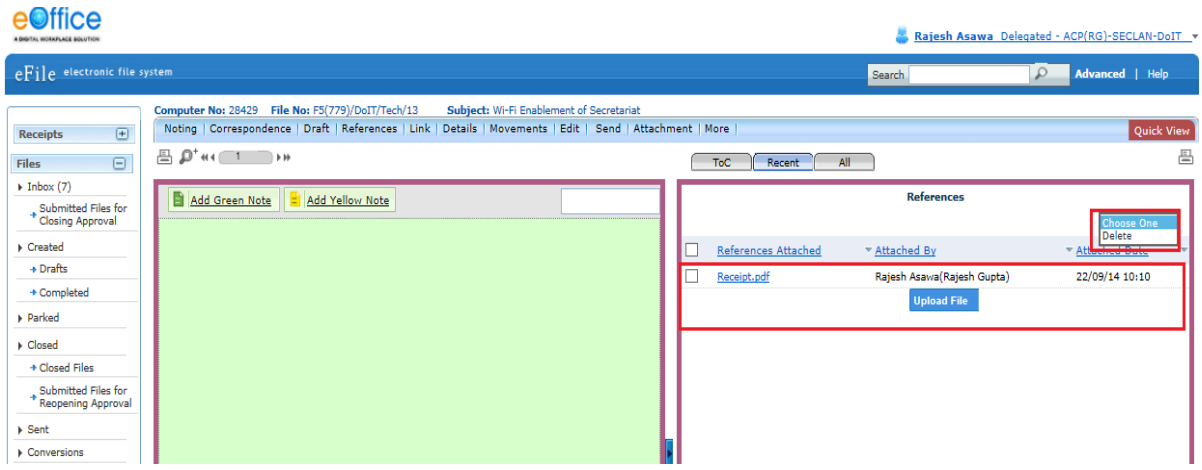
Local Reference: Document is browsed and attached from local domain.

To attach Reference user has to perform following steps:

1. Scroll mouse over References link and select the Local Reference option under it. As a result References page appears on right side of noting page and click on upload button.



2. Browse the reference document from the Local system and click the Attach button.

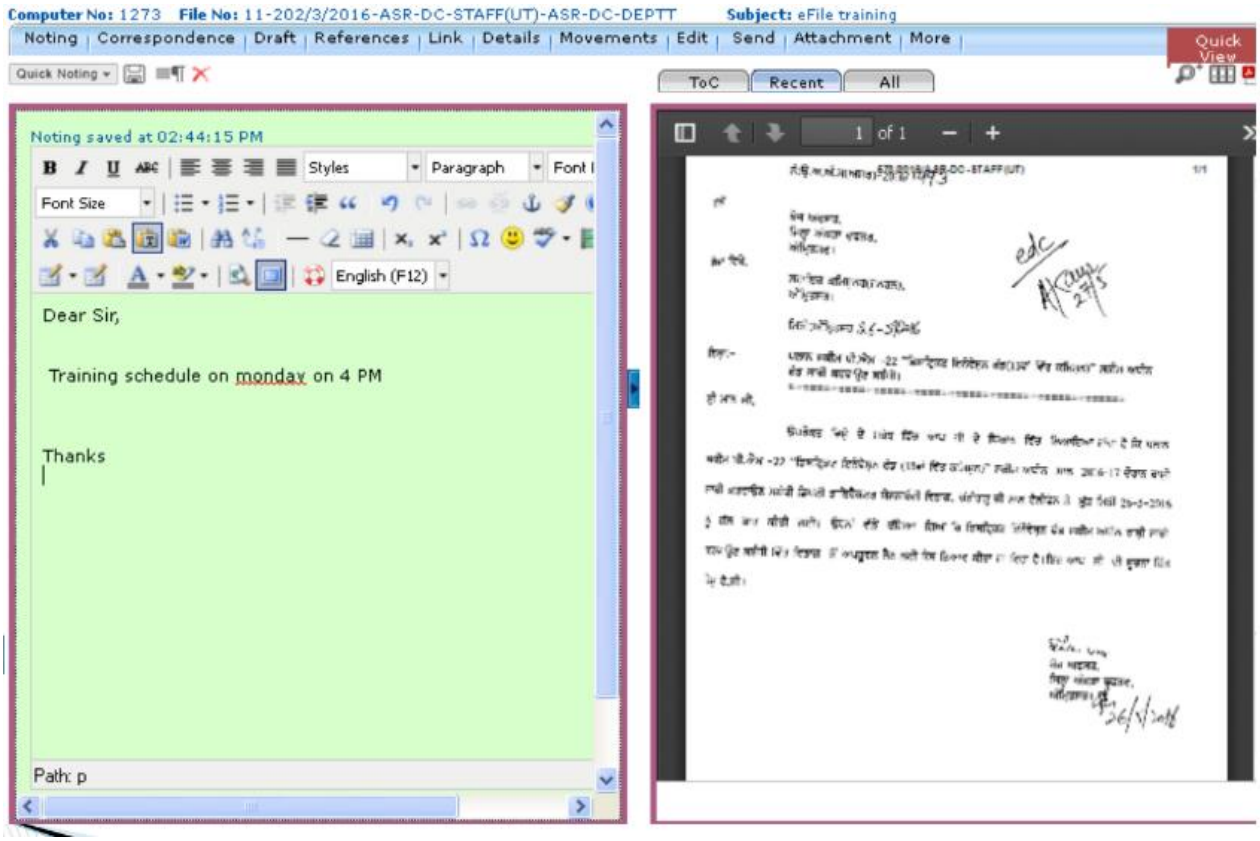


As a result the attached reference document gets attached to the working file, also user nay delete the attached reference document by selecting the document and clicking on Delete Button.

HOW TO ADD NOTING

The left side of the file is the noting side, user can add noting by simply typing onto the green side, there are two types of noting:

- Green note
- Yellow note

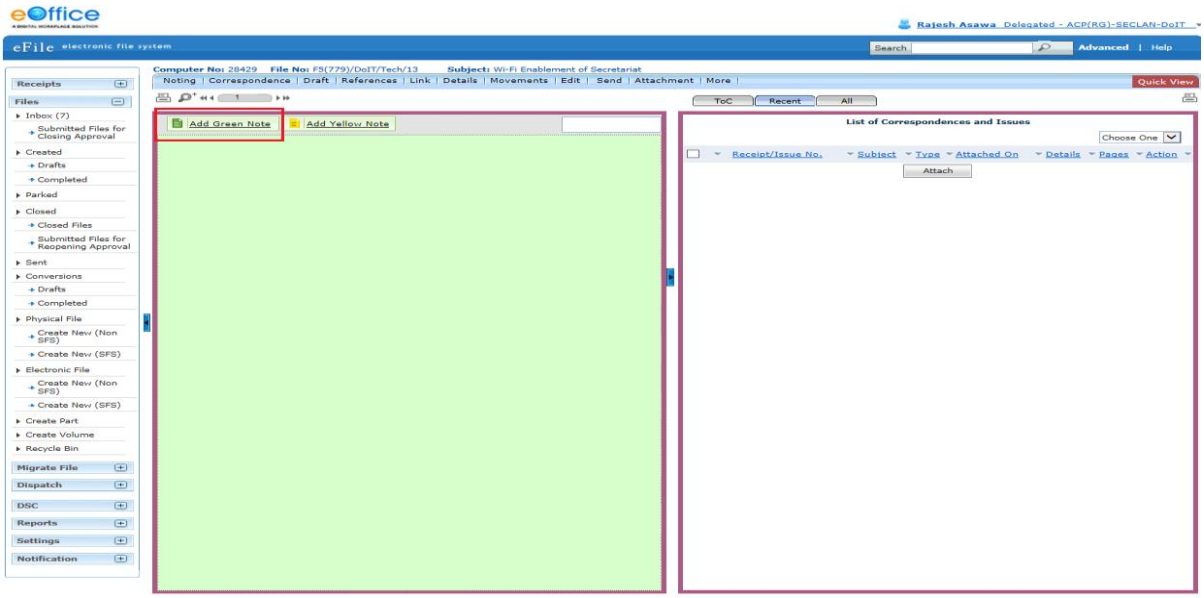


Green Note

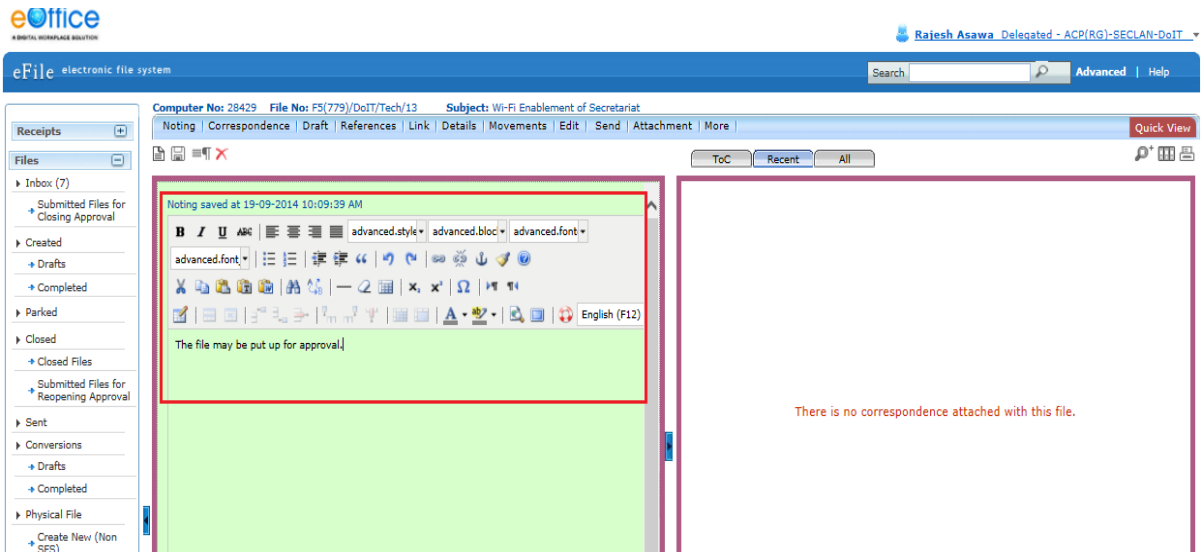
Green note is permanent noting if one person sends it, after sending it cannot be changed.

To add a Green Note user has to perform following steps:

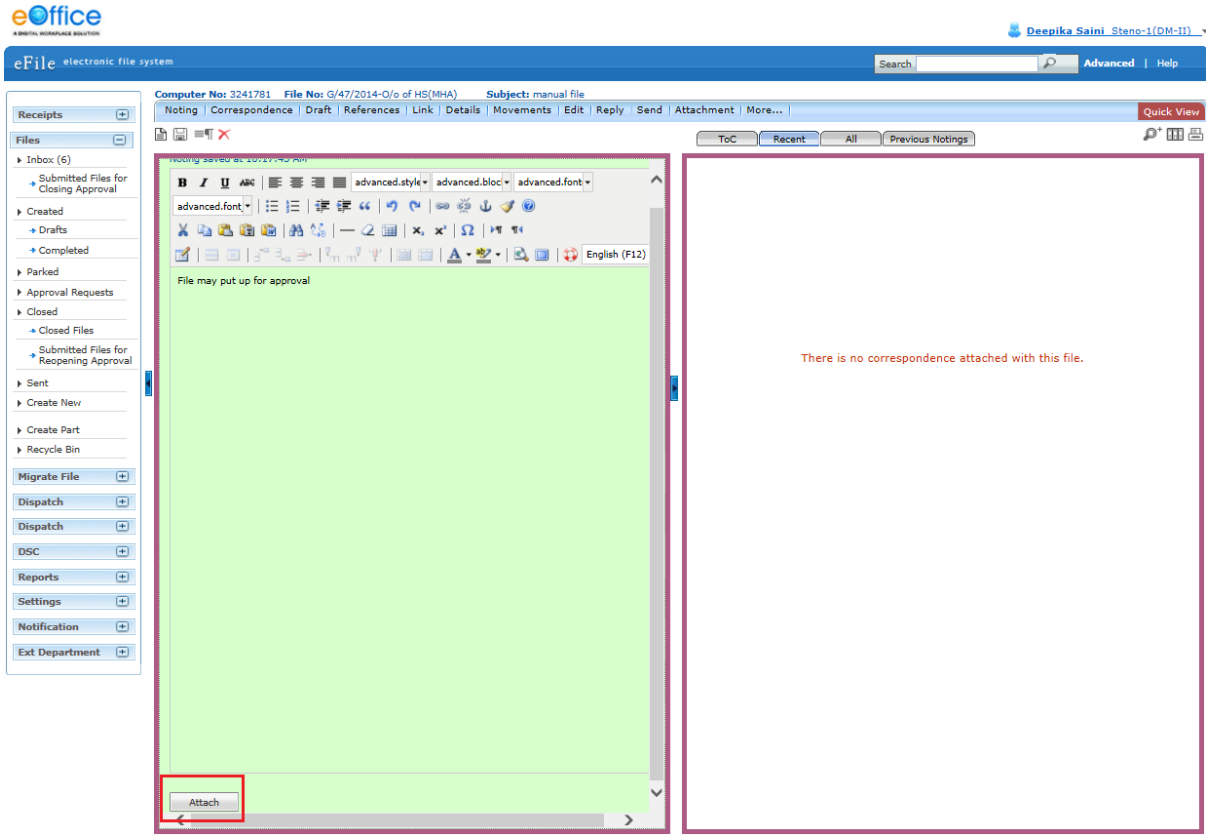
1. Click on Add Green Note link.



2. As a result, noting page becomes active and user can add do the noting on the editor. Noting done by the user gets automatically saved.



3. The User can also attach a document (Pdf Format only) by clicking on Attach button at the bottom of the noting portion.



Yellow Note

Yellow note is a temporary note for employees to confirm noting from seniors and it can be discarded, edited or confirmed and once it is finalized, it can be converted into final Green Note.

To create a yellow note:

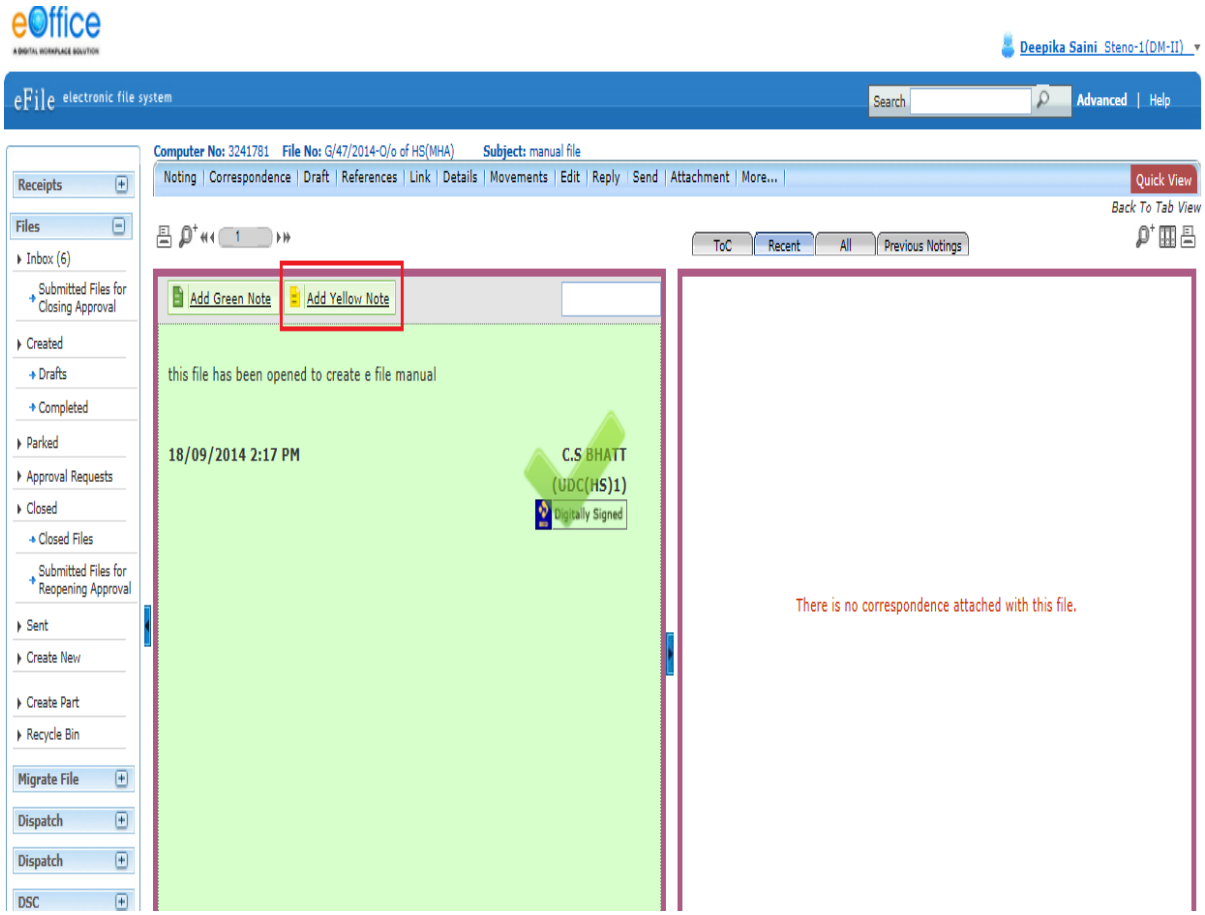
Create a new electronic file or open up the electronic file from file inbox in which yellow note needs to be created.

Click add new yellow note link on the left hand side of file.

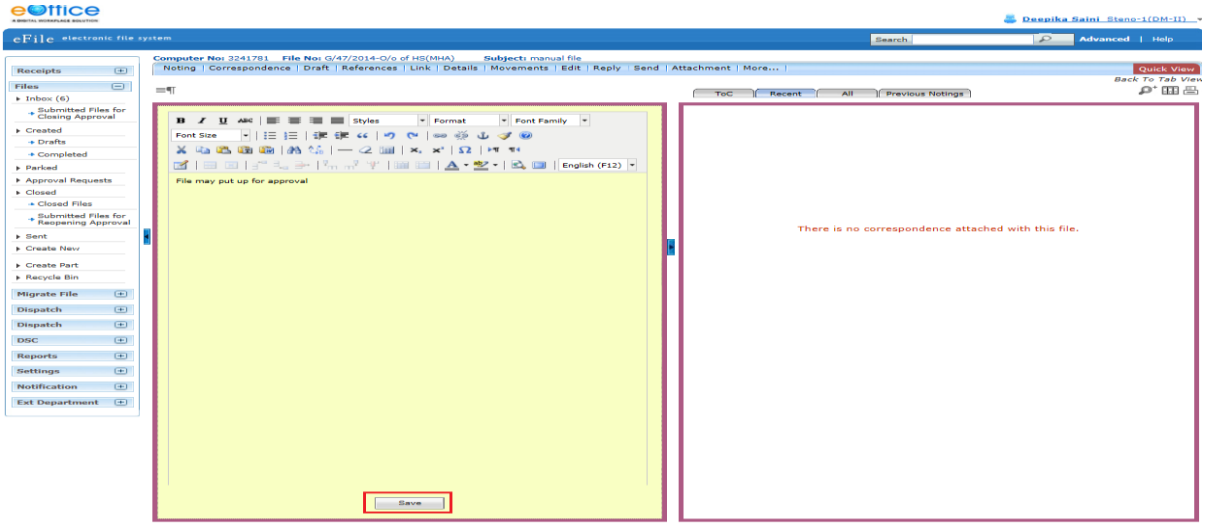
Enter the content to yellow note and click save button.

To add a Yellow Note user has to perform following steps:

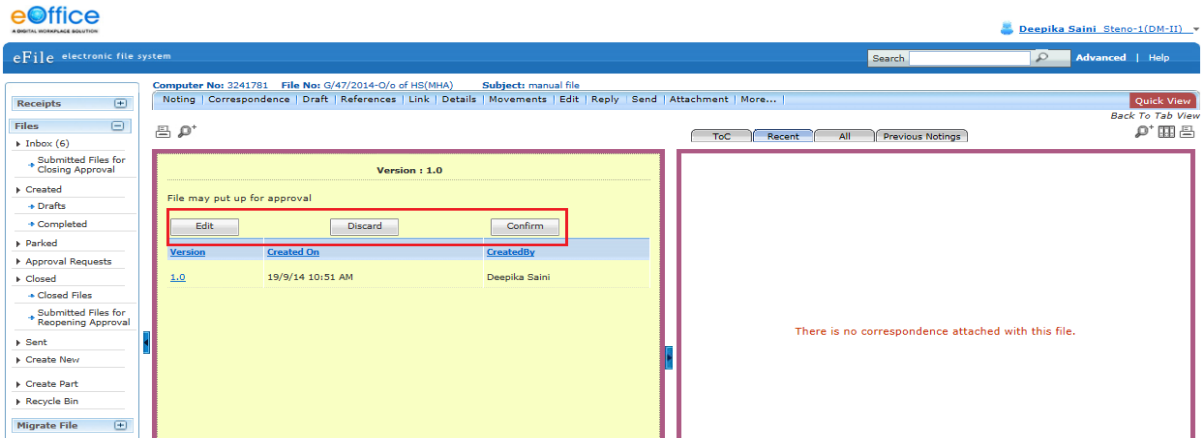
1. Click on Add Yellow Note.



As a result noting becomes active and user can add note



2. After making a note on yellow sheet, click the Save Button. As a result, yellow note get saved.



3. After the note is saved, user can perform any of the following options as per authorization.

- **Edit**: Refers to edit the Yellow note
- **Discard**: Refers to Discard the Yellow note
- **Confirm**: Refers to Confirm the Yellow note

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

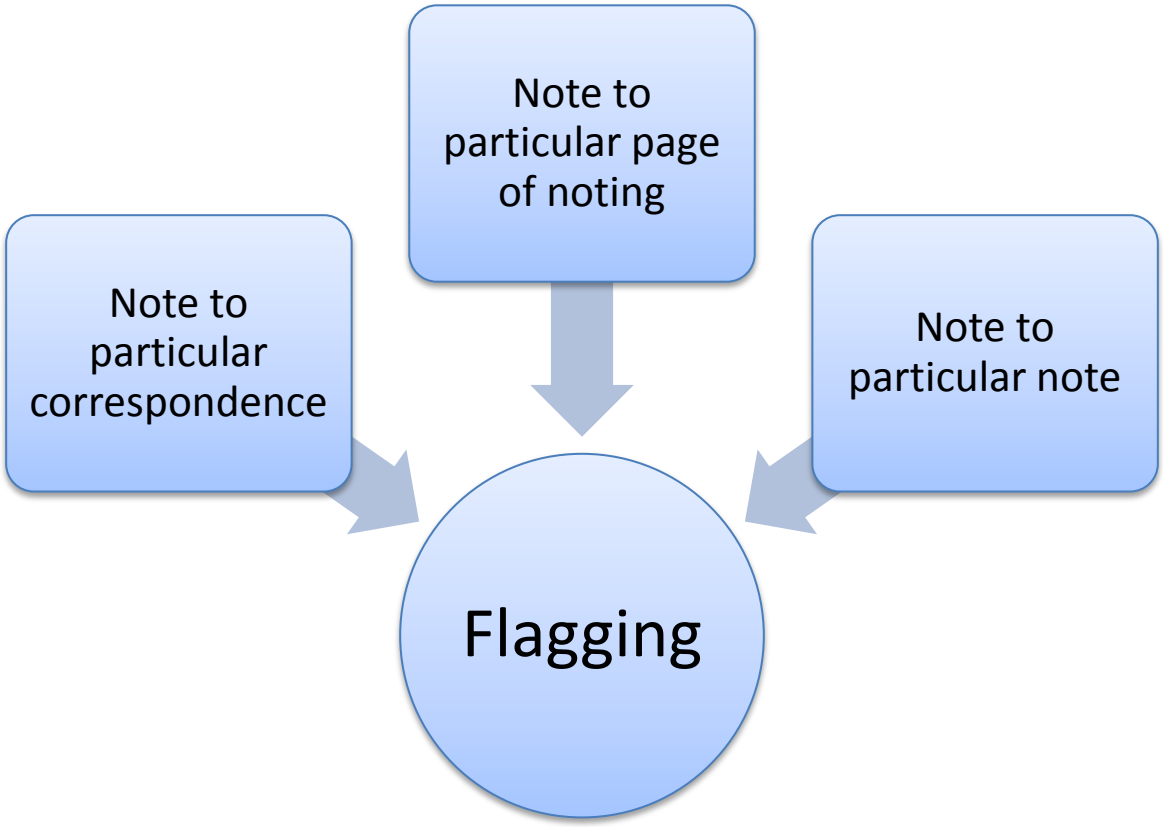
Yellow Note vs. Green Note

Green Note	Yellow Note
Once the Green Note is sent with the file can't be changed, overwrite and deleted	After Writing the Yellow Note we have the three options:- ➢ Edit: - Edit the Yellow Note. ➢ Discard: - Discard the Yellow Note. ➢ Confirm: - Confirm the Yellow Note. Once the yellow note gets confirmed, noting gets finalized and saved to main Green sheet Noting

HOW FLAGGING IS DONE IN A FILE

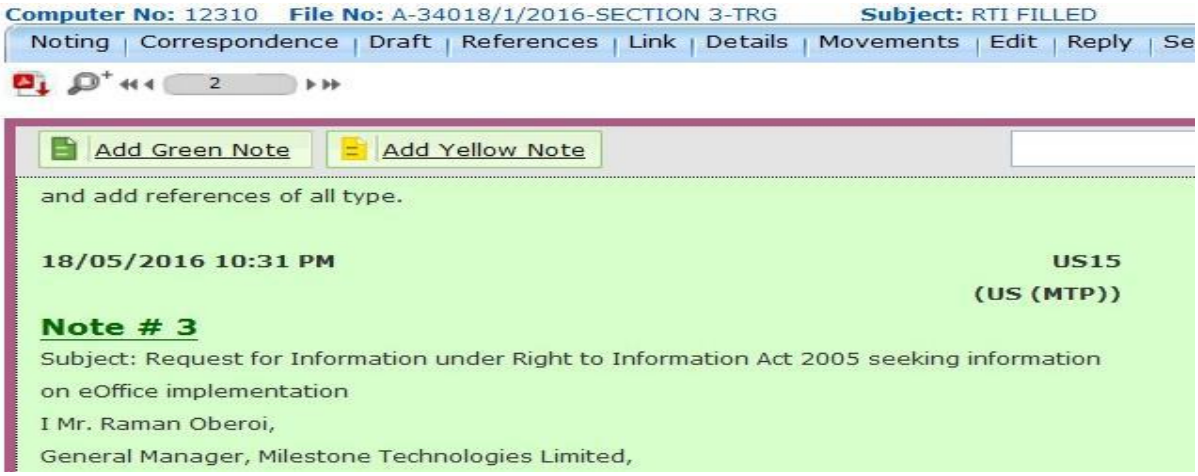
There are 3 types of flagging:

1. Note to correspondence
2. Note to note
3. Note to paragraph of previous noting

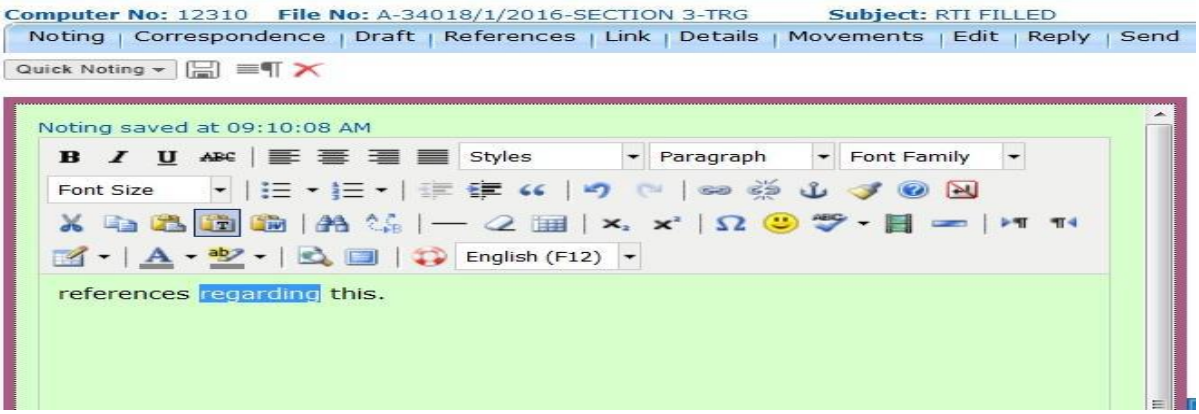


NOTE TO CORRESPONDENCE

1. Open File and Click on Add Green Note.



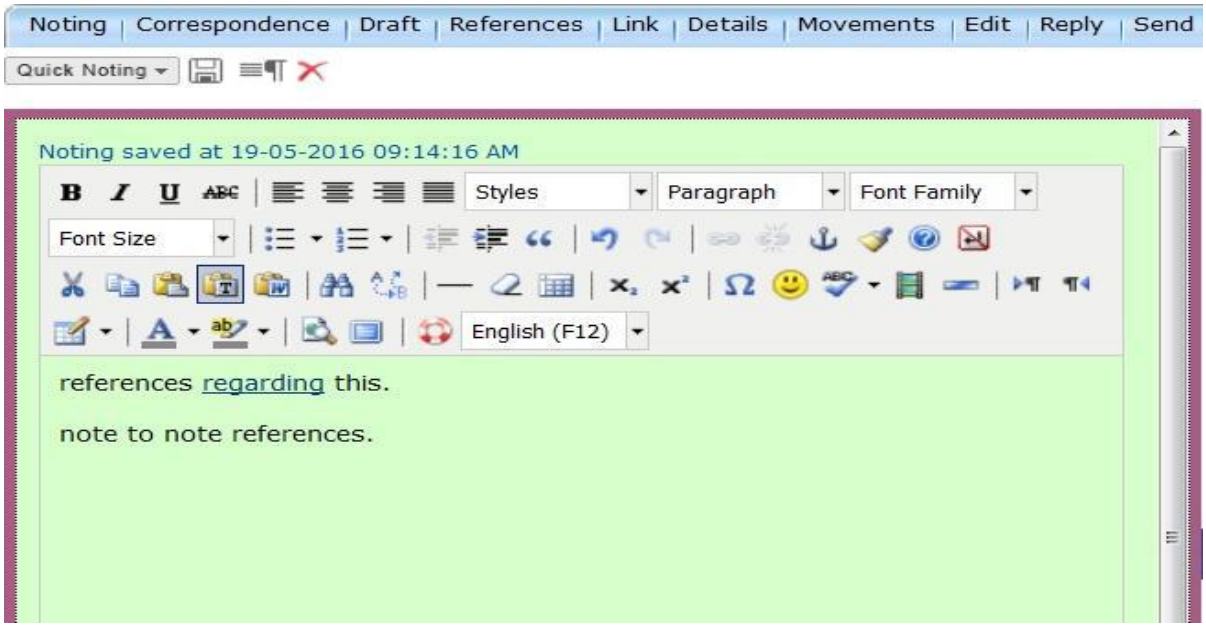
2. Select to Refer



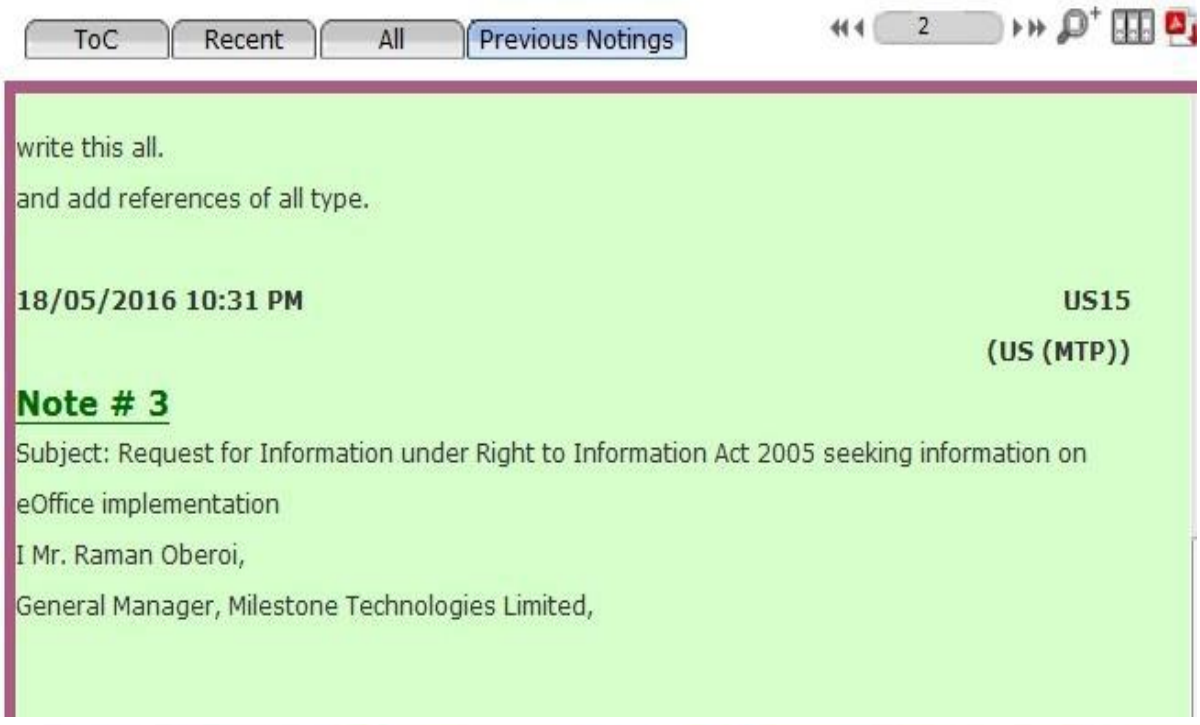
3. After that click on

NOTE TO NOTE

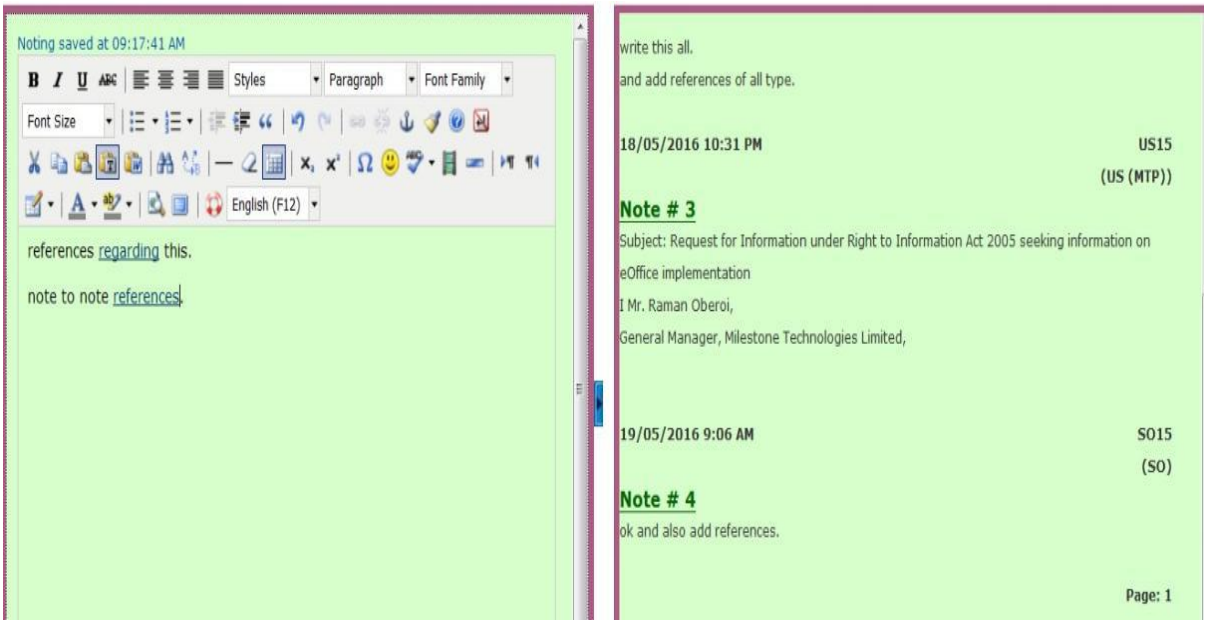
1. Write on green note



2. Open previous nothings

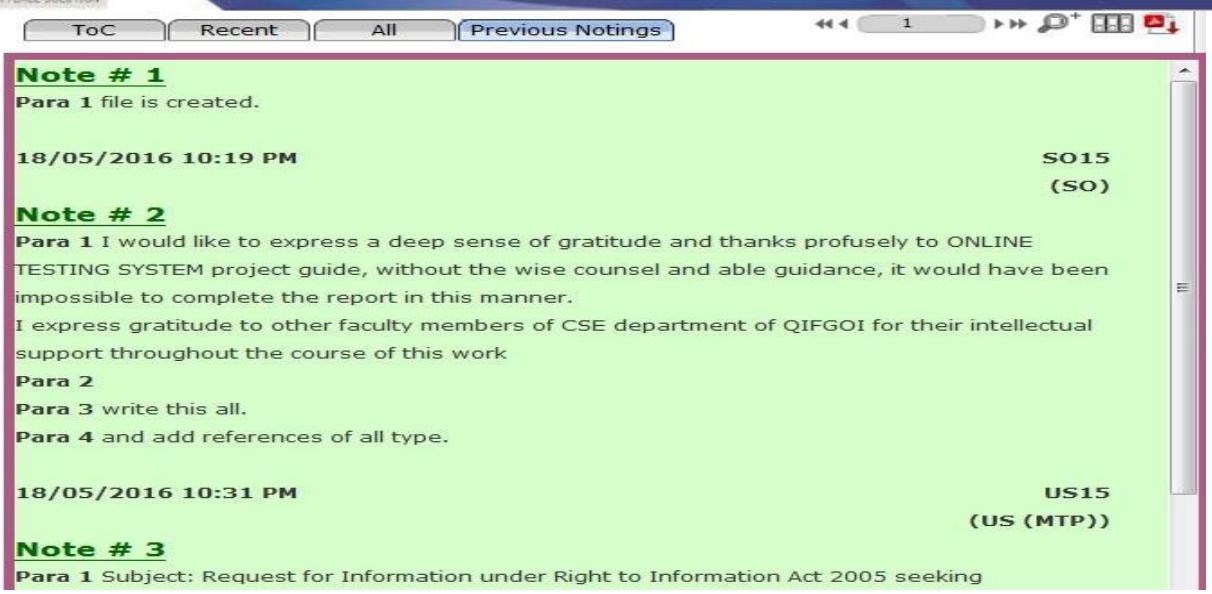


3. Select and click on

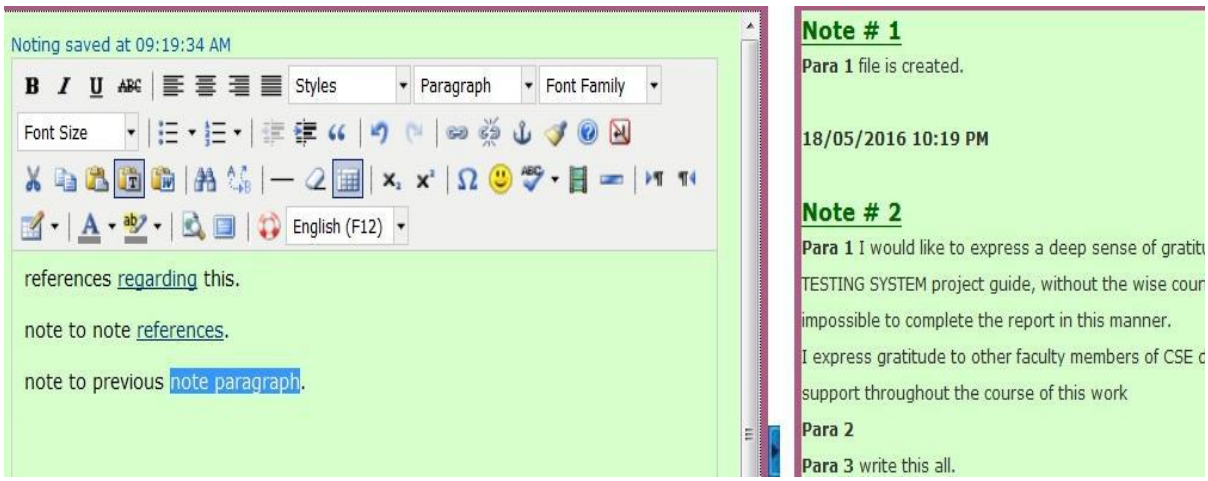


NOTE TO PARA OF PREVIOUS NOTING

1. Open previous noting and select



2. Write and select paragraph to refer



Example: Para 2 selected

Note # 1

Para 1 file is created.

18/05/2016 10:19 PM **SO15**

(SO)

Note # 2

Para 1 I would like to express a deep sense of gratitude and thanks profusely to ONLINE TESTING SYSTEM project guide, without the wise counsel and able guidance, it would have been impossible to complete the report in this manner.

I express gratitude to other faculty members of CSE department of QIFGOI for their intellectual support throughout the course of this work

Para 2

Para 3 write this all.

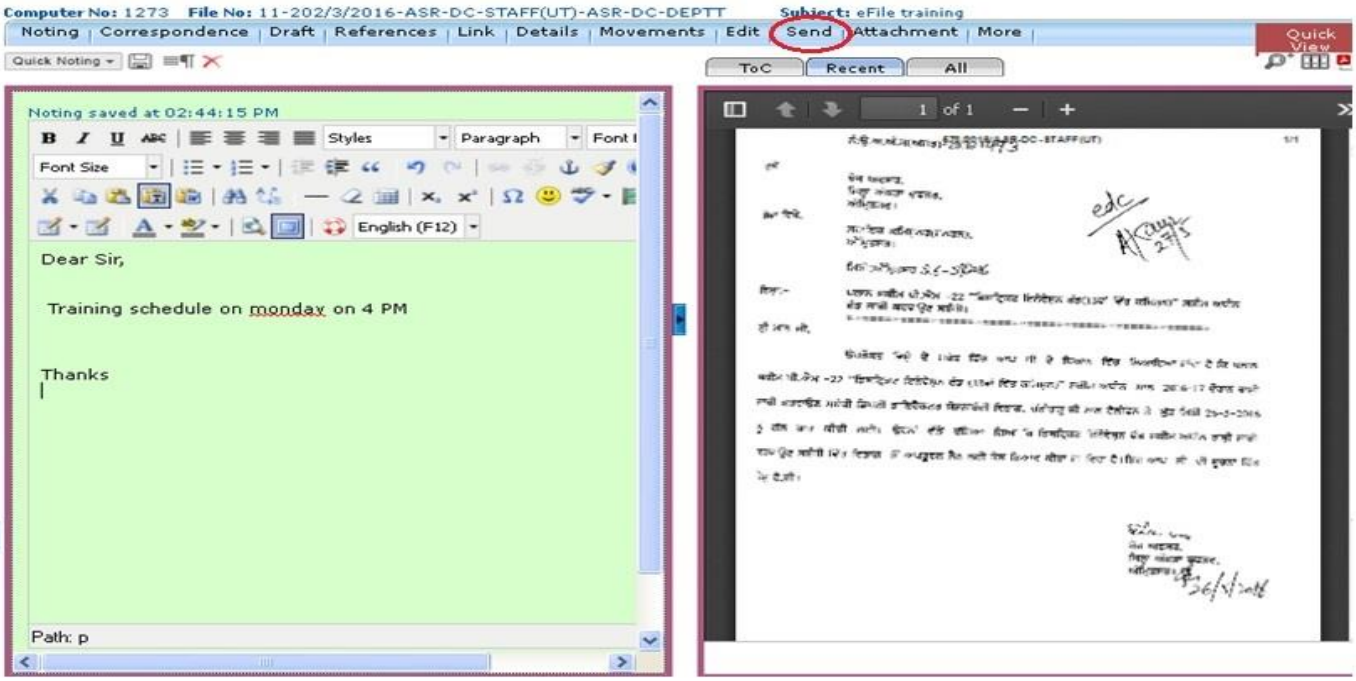
Para 4 and add references of all type.

18/05/2016 10:31 PM **US15**

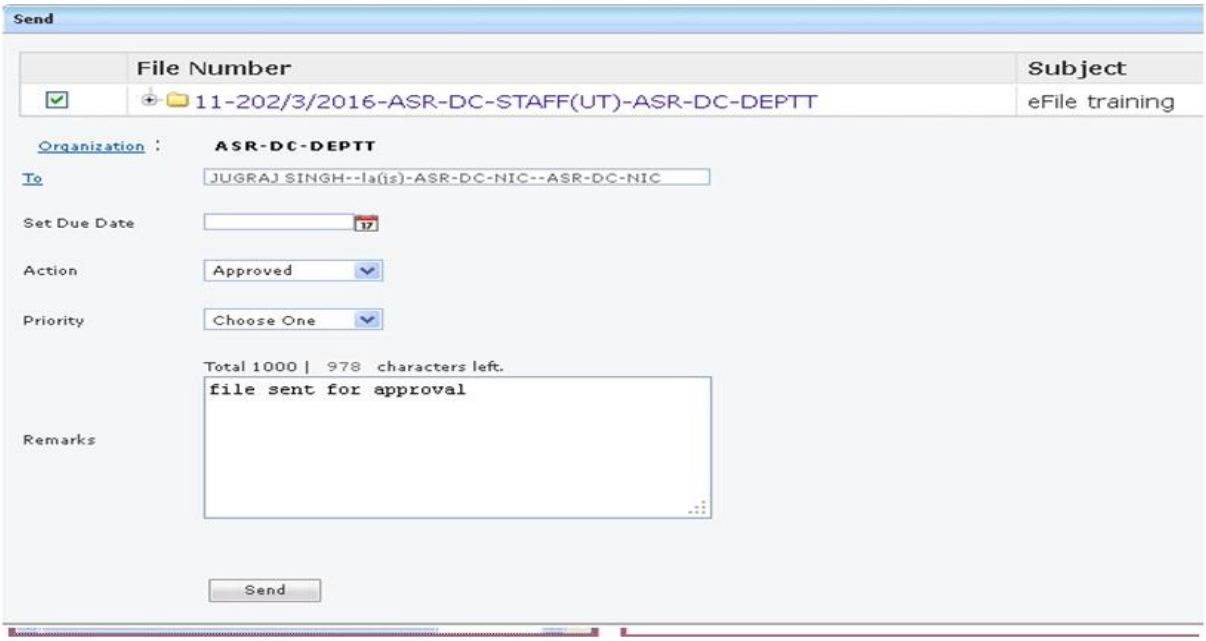
(US (MTP))

HOW TO SEND A FILE

Click on the send button from the top menu.



As a result user gets following send screen, select the contact from the 'to' filed, enter action, priority and remarks if necessary.



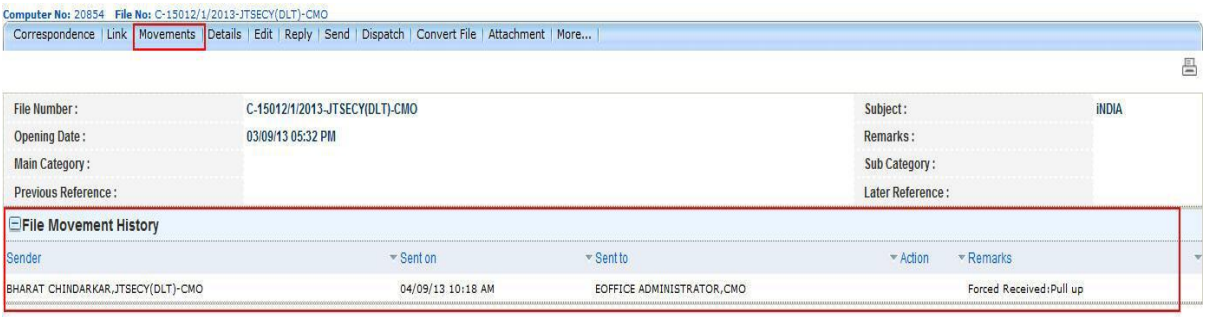
HOW TO SEE FILE MOVEMENTS AND DETAILS

MOVEMENTS

With the help of this feature user can see the movement of a File i.e. the details of all the users who have worked on it.

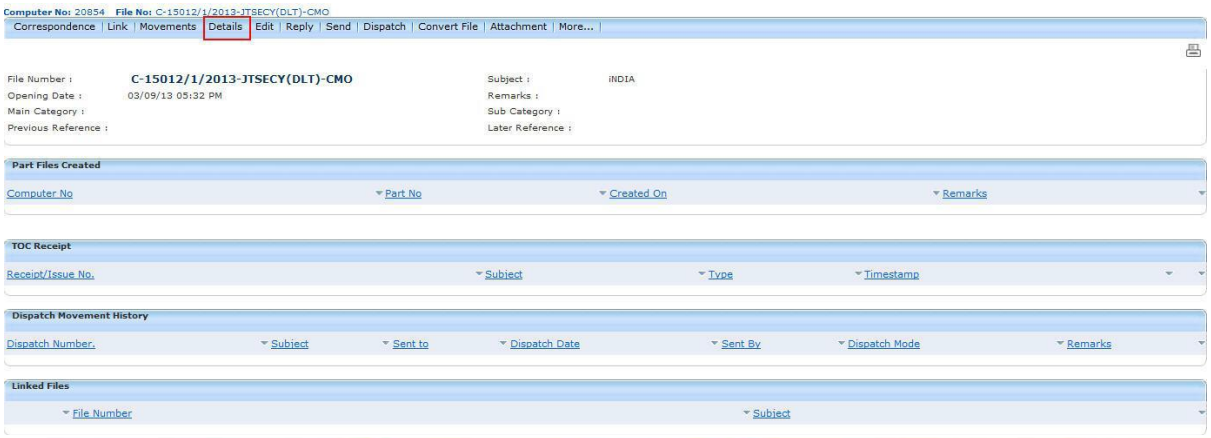
To see the movement of a file user has to perform following steps:

1. Click the Movements () Link
2. As a result Movement page appears showing all the details of File Movement History



DETAILS

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



HOW TO PREPARE A DRAFT

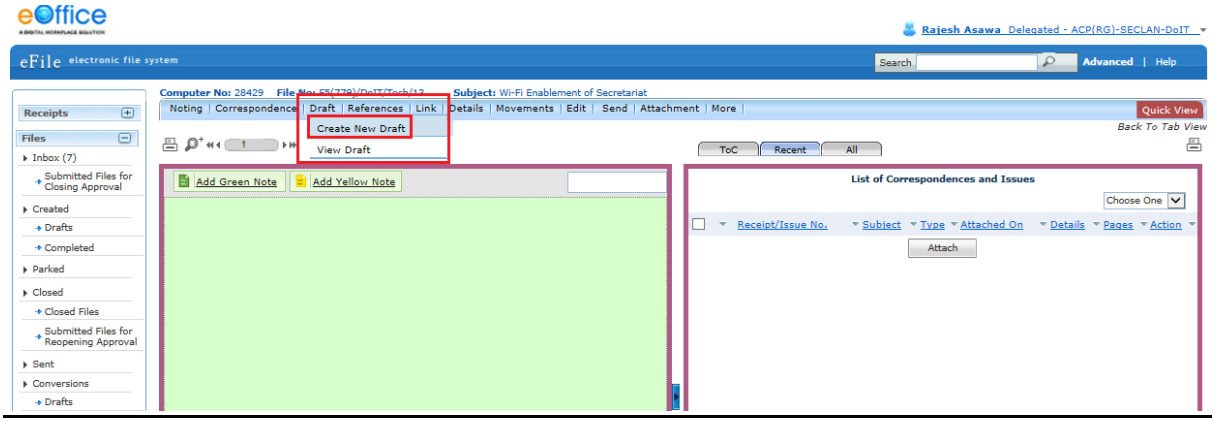
With the help of this feature user can Create New Draft and View Existing Drafts in the File.

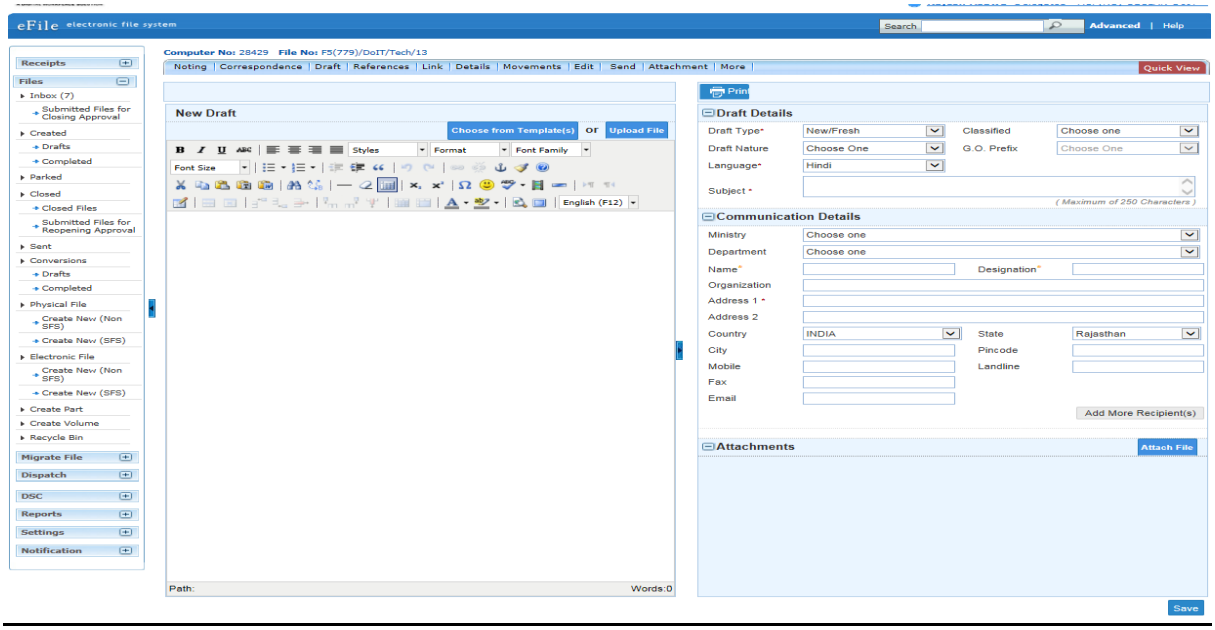
Draft has 2 types:

1. New/Fresh
2. Reply

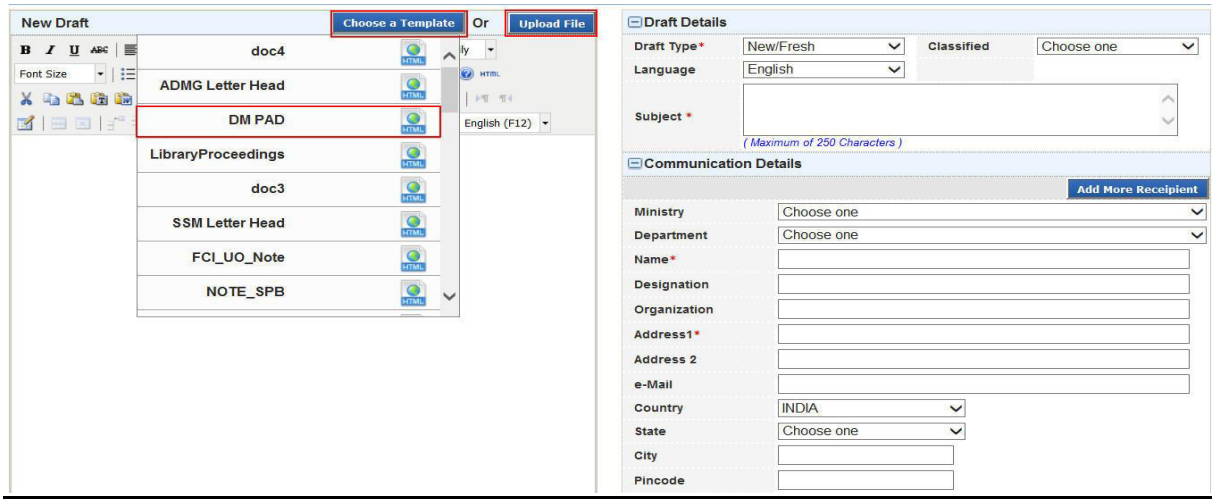
To create New Draft user has to perform following steps:

1. Scroll mouse over Draft link and click the Create New Draft option, as a result Create New Draft page appears

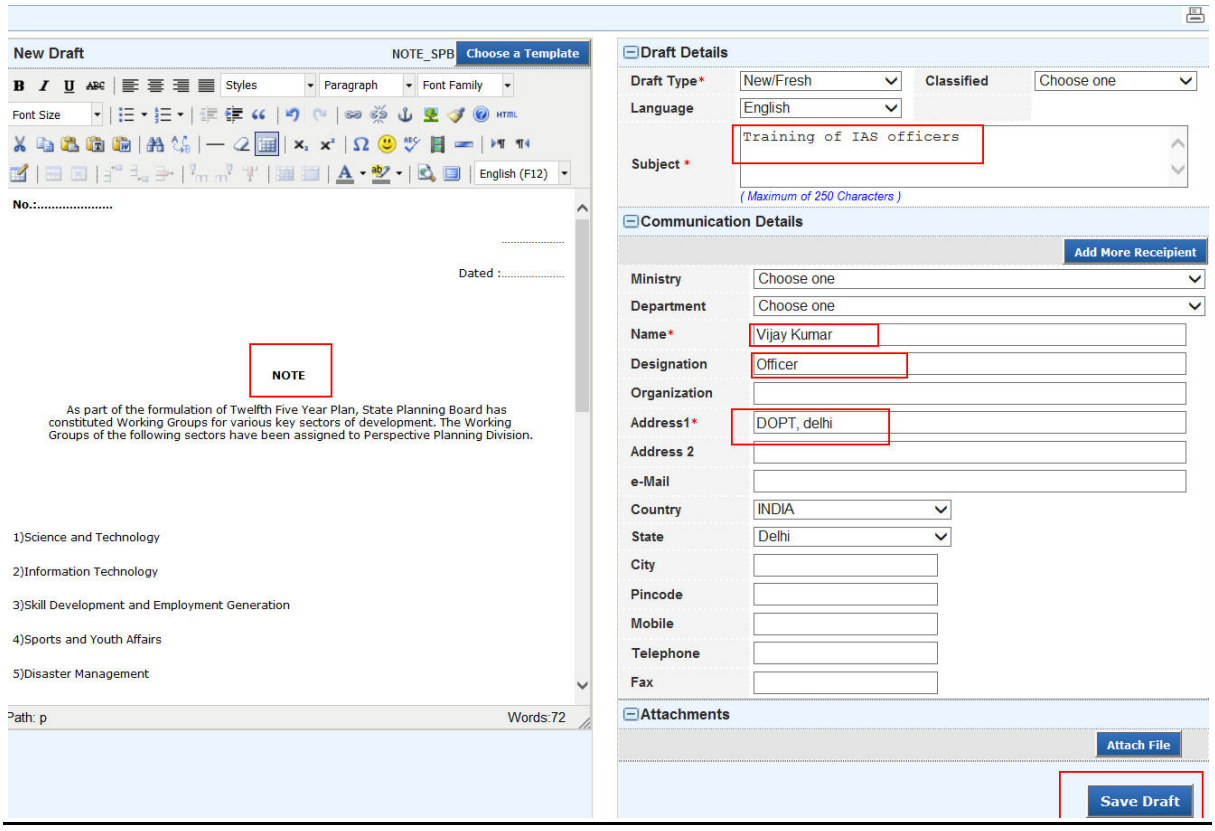


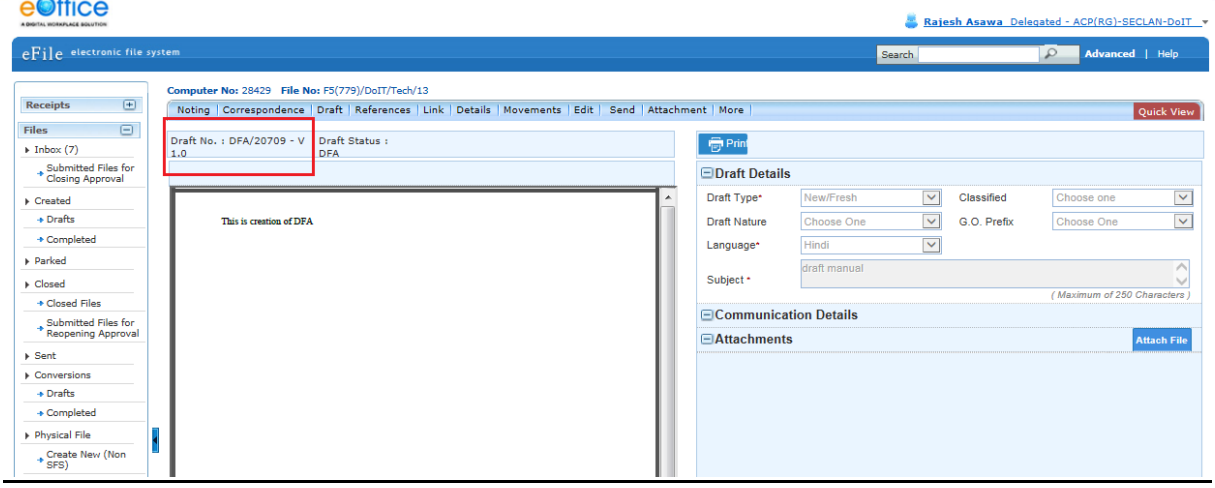


2. Either type the draft manually or choose a predefined template by clicking on Choose a Template button or upload an already existing draft by clicking on Upload File button

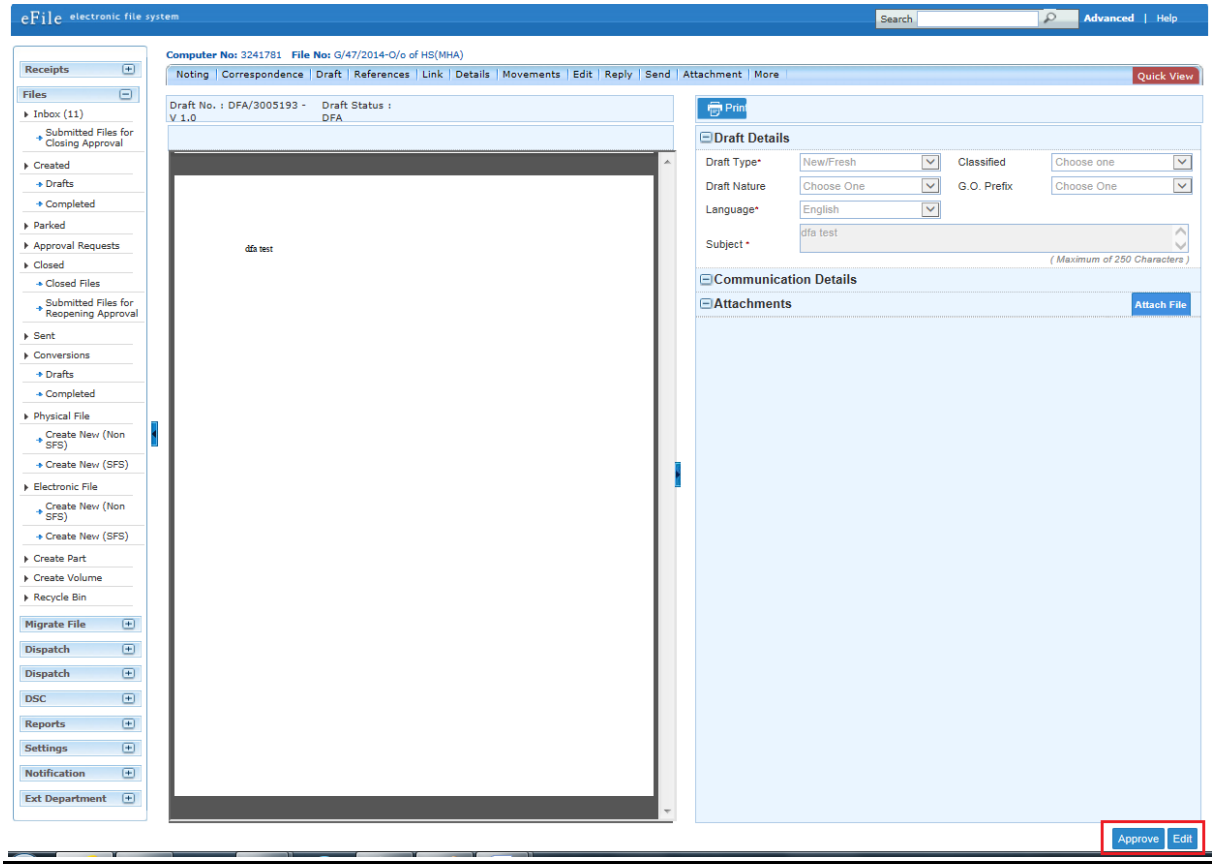


3. Enter all the necessary details and click on Save Draft button, As a result new Draft number is created



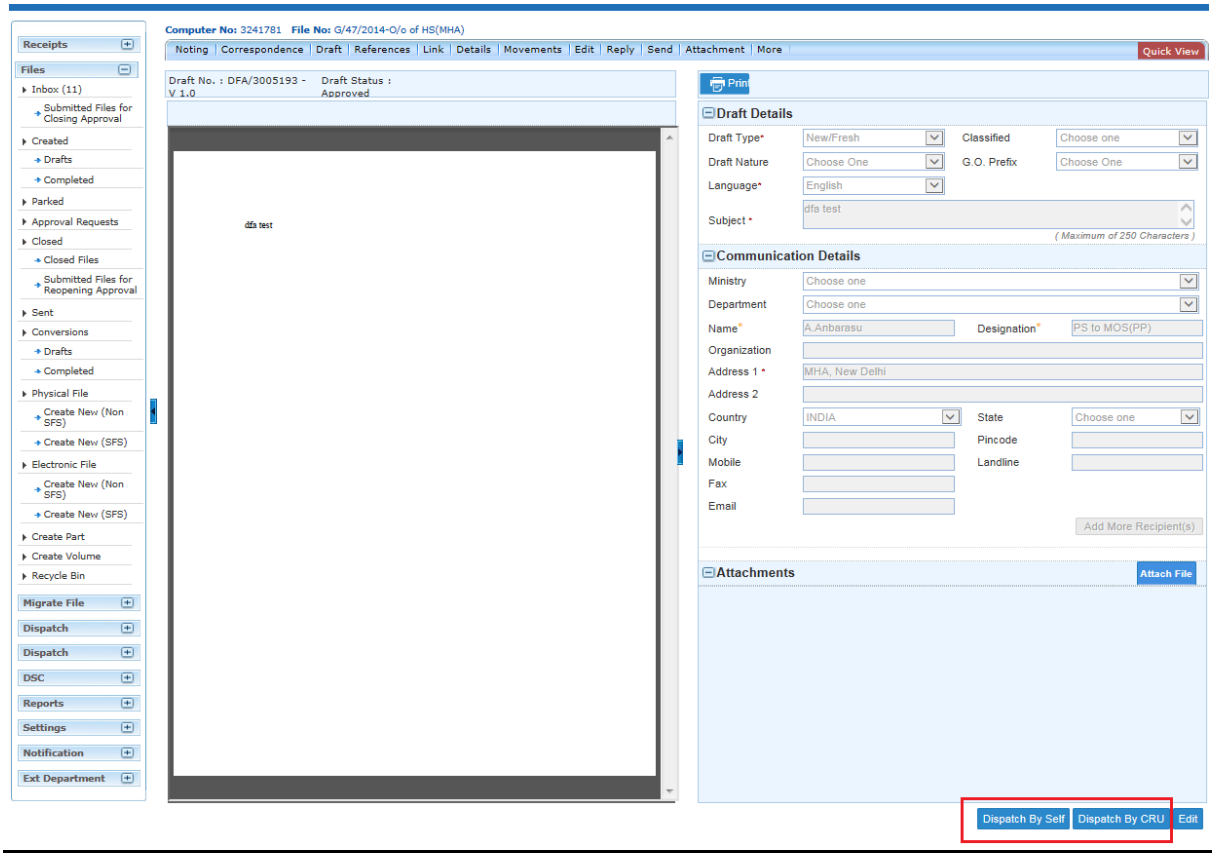


4. Click the Approve Button to approve the saved draft



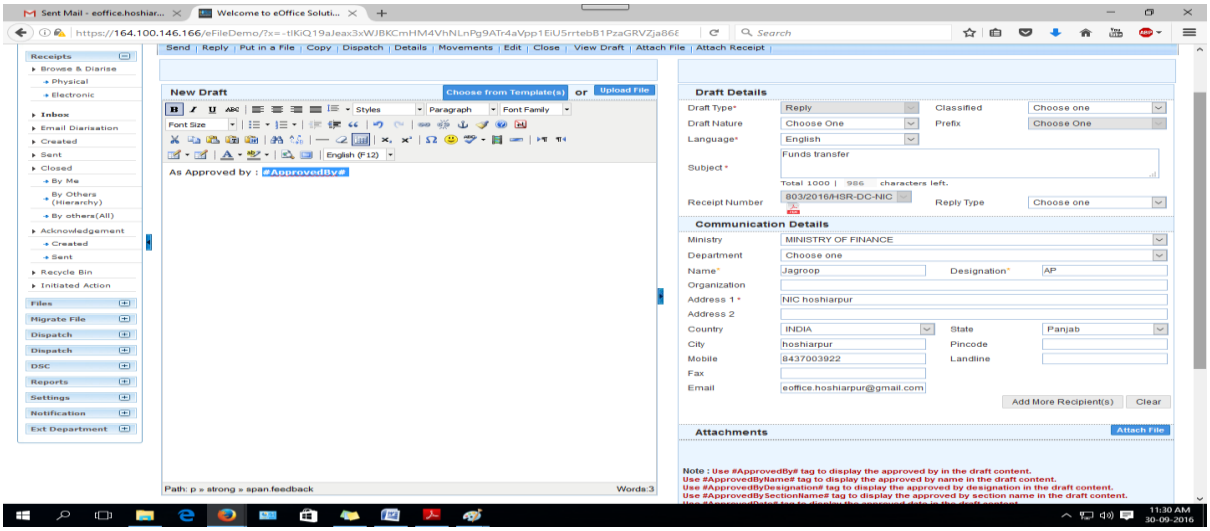
☞ *The Approve button will only be visible to those users who are having the required Role of Draft Approval. Other users will not be able to approve the DFA and can only send the DFA to the users.*

As a result DFA is approved and following screen appears



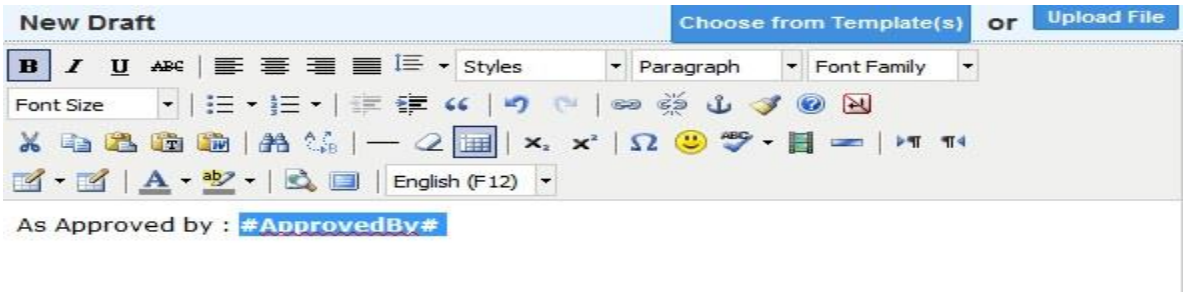
HOW TO DISPATCH A FILE

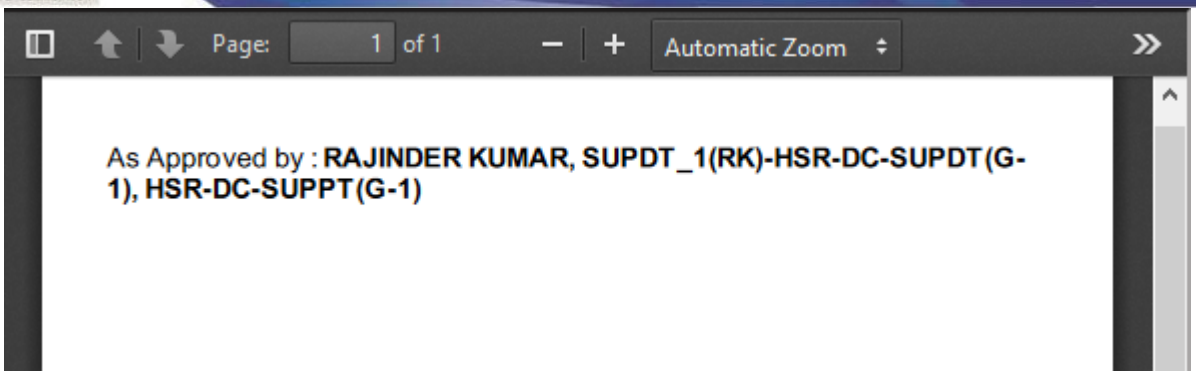
User can use this option to dispatch a receipt. The dispatch window is displayed having all the metadata on right side prefilled as per the details entered while diarizing the receipt.



User creates a draft reply in response to receipt and click on save, a unique draft number is generated on which further process is done.

There are number of **hash tags** which can be used in the draft, these hash tags will automatically populate details of a person who approved it.

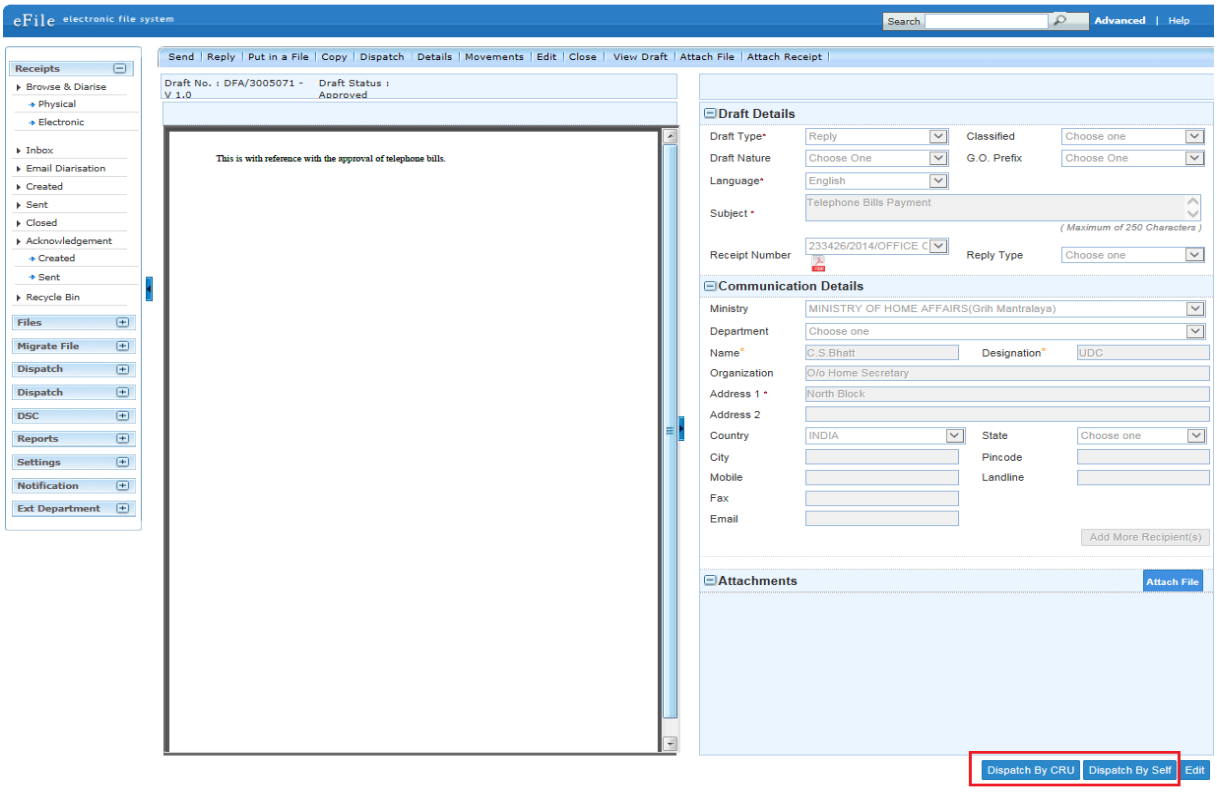




Depending on the Approving rights assigned to the user, he/she may approve the draft or send the receipt having the draft for further process.

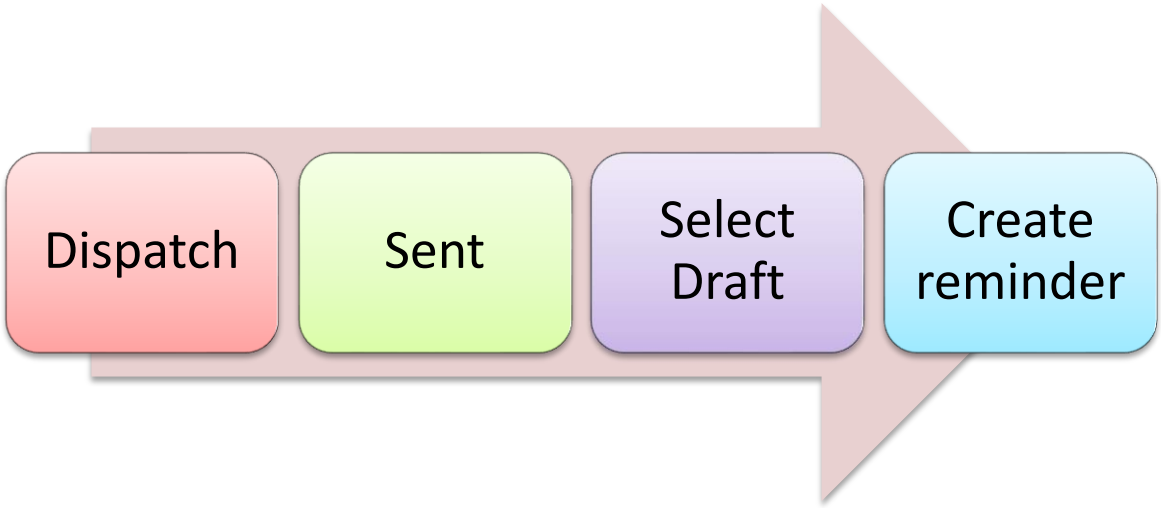
After approving the draft, user has the option to:

- ❖ Dispatch by CRU
- ❖ Dispatch by Self

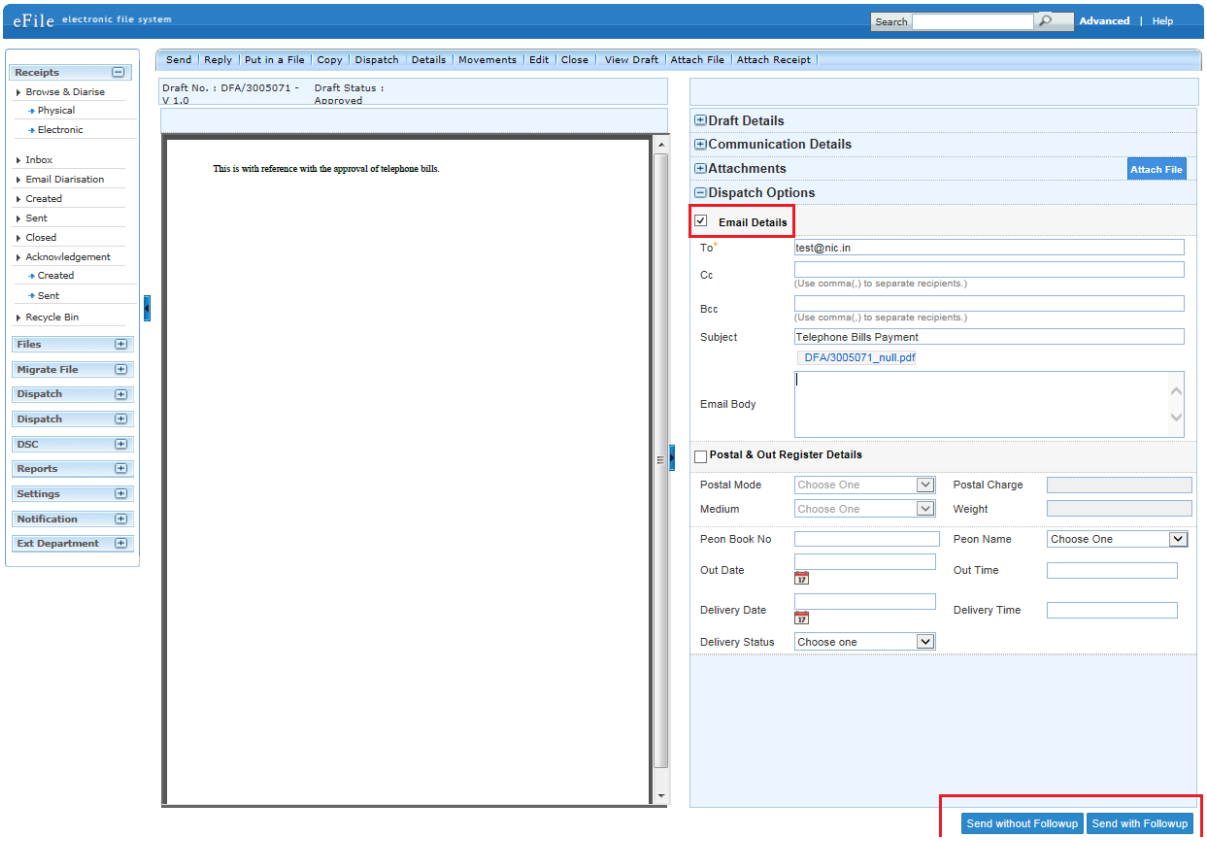


Dispatch by self

There are two options to send either by post or email, and it can be sent with follow-up or without follow-up. If a draft is issued with a follow-up and there is no reply a reminder letter can be created.

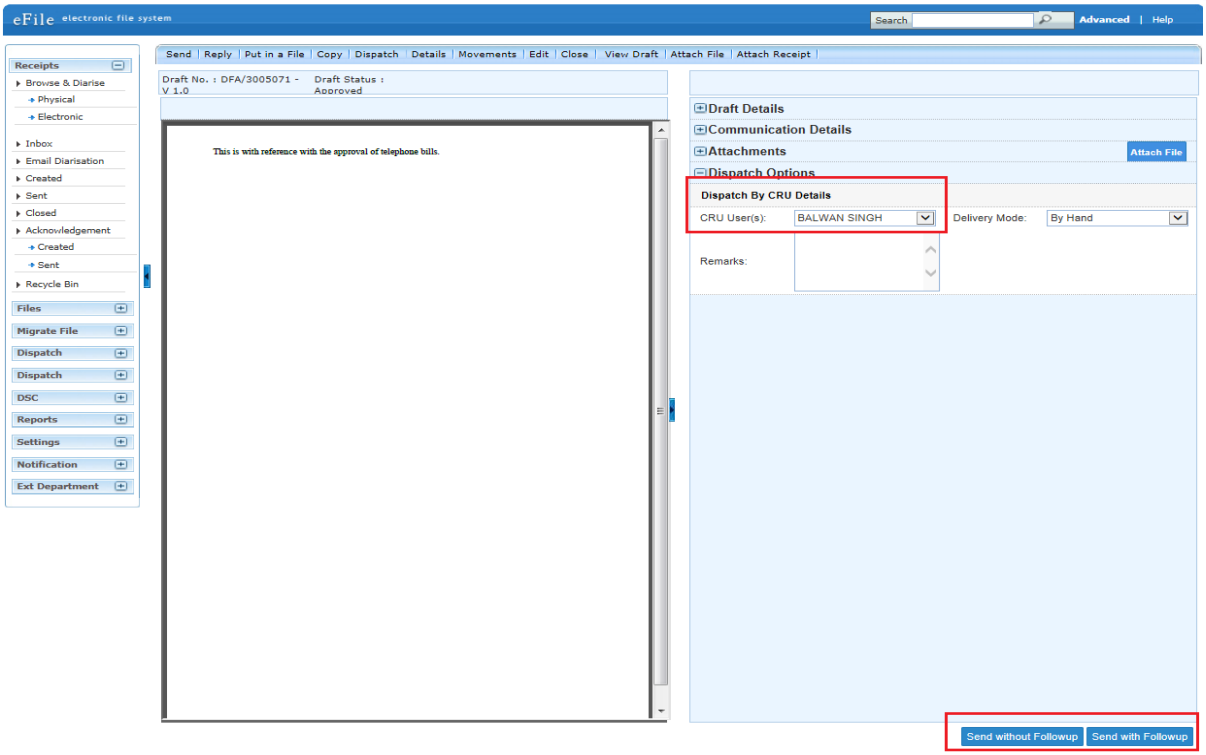


Reminder is also a draft so select create new draft but now type of draft will be reminder.



Dispatch by CRU

Fill in the details of CRU user who has to dispatch, it goes to the inbox of the specified CRU user.



ISSUE

Issue is the letter that is dispatched to the applicant. It can be interim or final. There are three types of issue status:

- **Issued and Sent**: Refers to when the DFA has been sent by the user/section but has not been dispatched finally by the CRU/DND section.
- **Issued and Dispatched**: Refers to when the DFA that has been sent to CRU/DND section has been finally dispatched.
- **Issued and Returned**: Refers to when CRU/DND section returns the DFA back to the user.

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

- Inbox
  - Submitted Files for Closing Approval (*Permission Based*)
- Created
  - Drafts
  - Completed
- Parked
- Approval requests (*Permission Based*)
- Closed
  - Closed Files (*Permission Based*)
  - Submitted Files for Reopening Approval (*Permission Based*)
- Sent
- Conversions
  - Drafts
  - Completed
- Physical File
  - Create New (Non-SFS)
  - Create New (SFS)
- Electronic File
  - Create New (Non-SFS)
  - Create New (SFS)
- Create Part
- Create Volume
- Recycle Bin

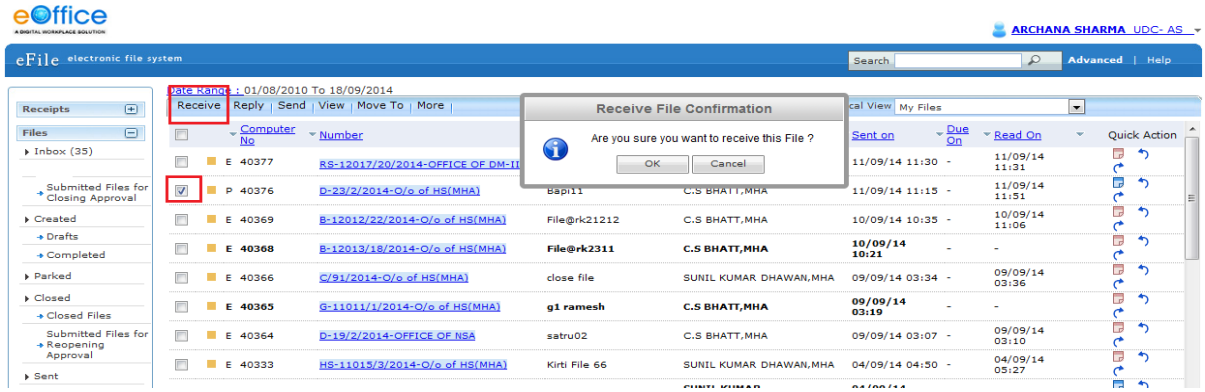
Let's have an introduction about these links one by one

INBOX

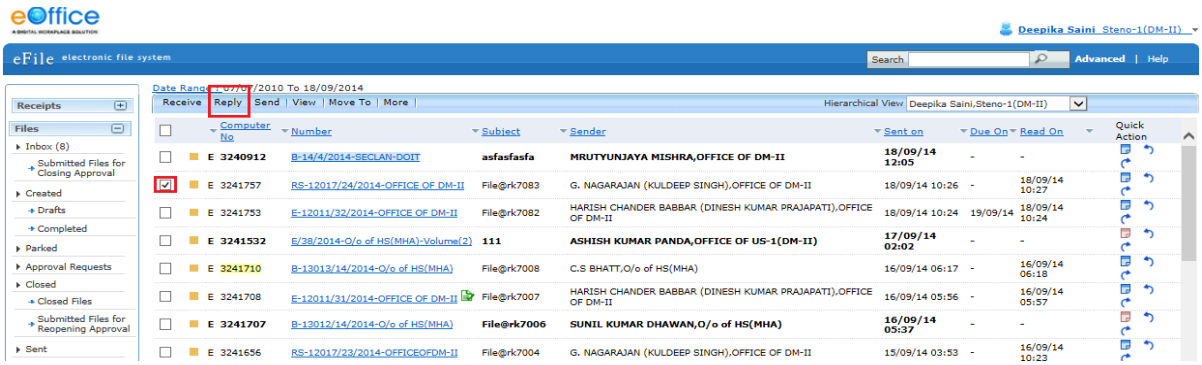
Inbox link contains the list of all the files that are received/ marked by any other eOffice user.

There are number of links provided under Inbox Section of Files:

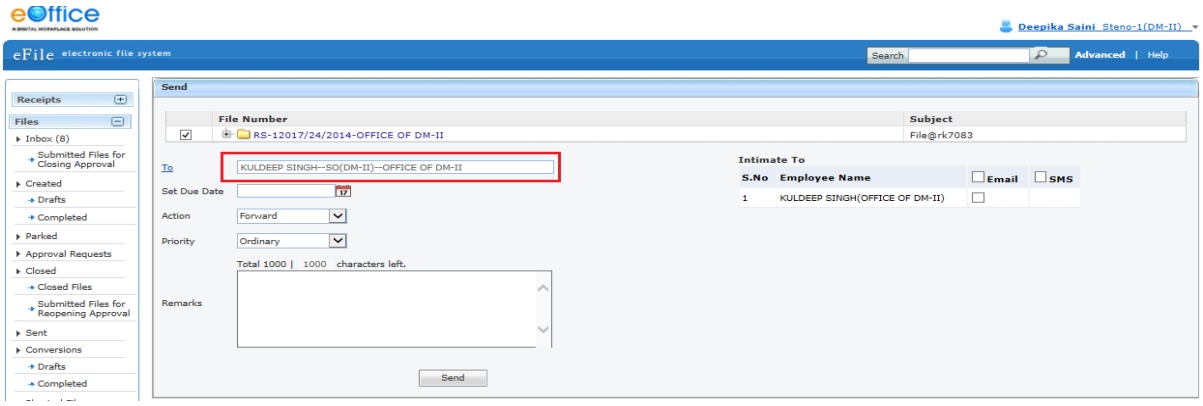
Receive: This link helps the user to receive the Physical file only.



Reply: This link helps the user to reply to the sender of the file.



Click the Reply link, as a result the recipient gets automatically selected from the send to list

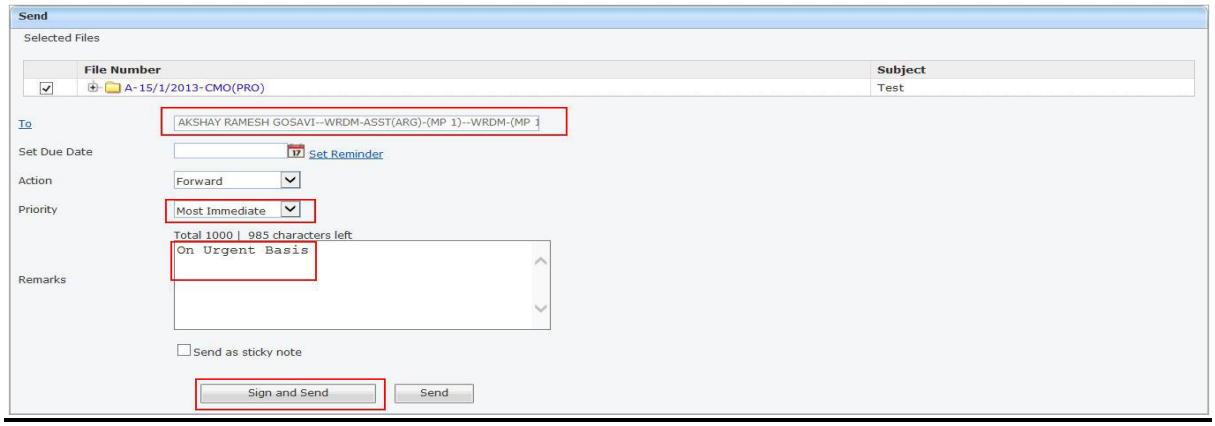


Sign & Send: The Process of *Sign and Send* is slightly different from the normal process of sending the file. User can now digitally sign ne file before sending it.

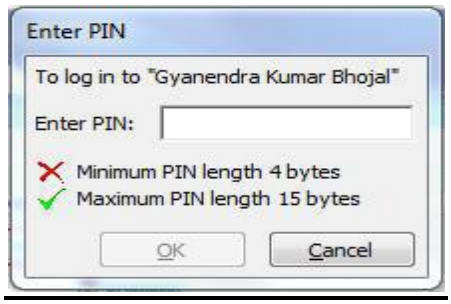
'Sign and Send' button will be accessible only if DSC is plugged in working mode else only Send button is visible.

To Sign and Send the File, user has to perform the following:

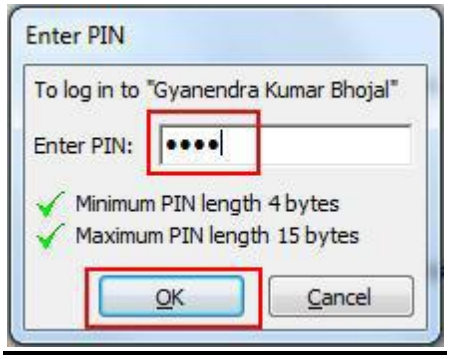
1. Enter the input required details to which file is to be sent and Click the Sign and Send button



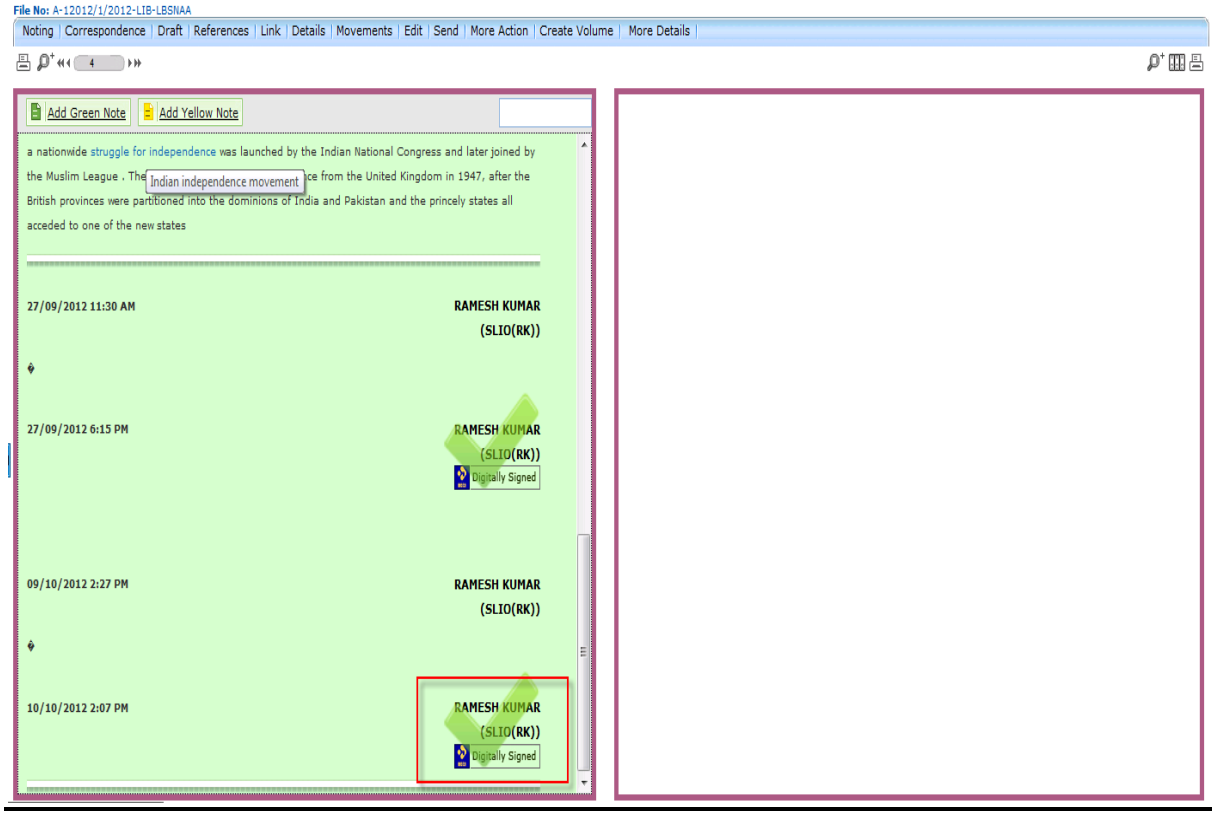
2. A pop window appears asking to enter Pin



3. Enter the Pin and click the ‘OK’ button



4. When received user opens the Inbox and click on the received file is displayed



Forward: This link helps the user to forward a particular File/s to the recipient.

View: This link helps the user to list the files depending upon its current state. i.e. (Unread, Read, Followed Up, Physical, Electronic, All)

Move To: Helps the user to create New Folders and manage Existing Folders.

- *My Folders*- Click the My Folders link from the dropdown menu to view the File inbox and its subfolders.
- *Manage Folders*- Click the Manage Folders link from the dropdown menu to Delete or Edit the folders created under File Inbox.
- *Create New Folder*- Click the Create New Folder link from the dropdown menu to create a new folder under File inbox

Mark As: This link helps the user to create a New Follow Up which keeps a track of a file, by alert mode, follow up action and specifying time to receive follow up on any corresponding file.

More Action: This link helps the user to Close or Park the active file.

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

Closed File History: Displays the history of the closed file.

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

CREATED

Created link contains a list of all the files whose file number has been generated but not marked/ sent to any other eOffice user as well as the files whose numbers are not generated. User can view all the created Files, by clicking on 'Created' link under the Files section.

Created Link Contains 2 options:

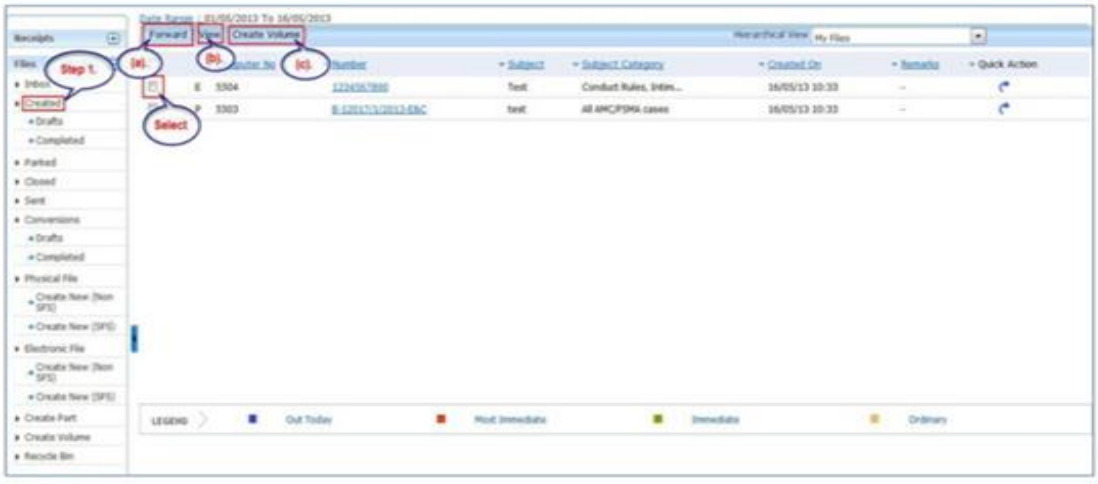
1. Drafts
2. Completed

Drafts: This option contains the Files whose number has not been generated and kept as draft to Work Later on. The files in the Draft option can be deleted and sent to Recycle Bin using Delete link.

Completed: This option contains the files whose number has been generated and kept in Created section to work later on.

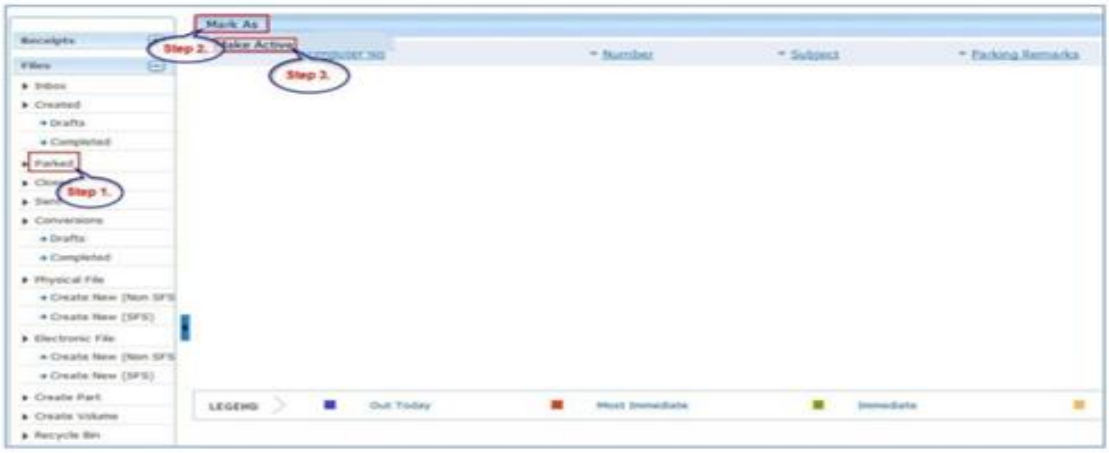
There are 3 sub links provided under Completed link of Created File Section:

- *Forward:* Helps the user to send/ forward the file to the intended recipient
- *View:* Helps the user to list the files depending upon its current state i.e. (Physical, Electronic, All)
- *Create Volume*: Helps the user to create a new volume of an existing file



PARKED

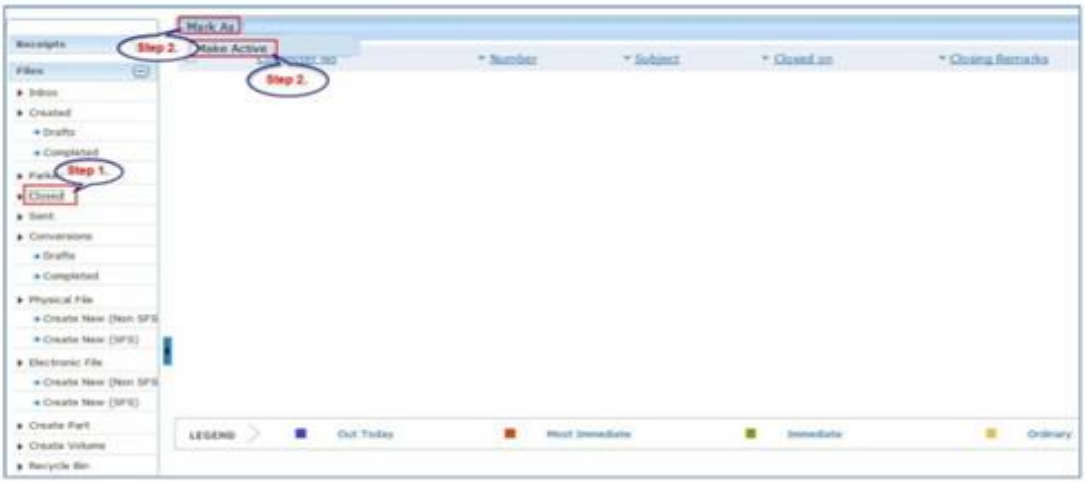
Parked link contains a list of all the Files that are temporary closed and work will be done later on. Pendency of File will be removed if any file is parked. Parked files can be made active at any point of time.



CLOSED

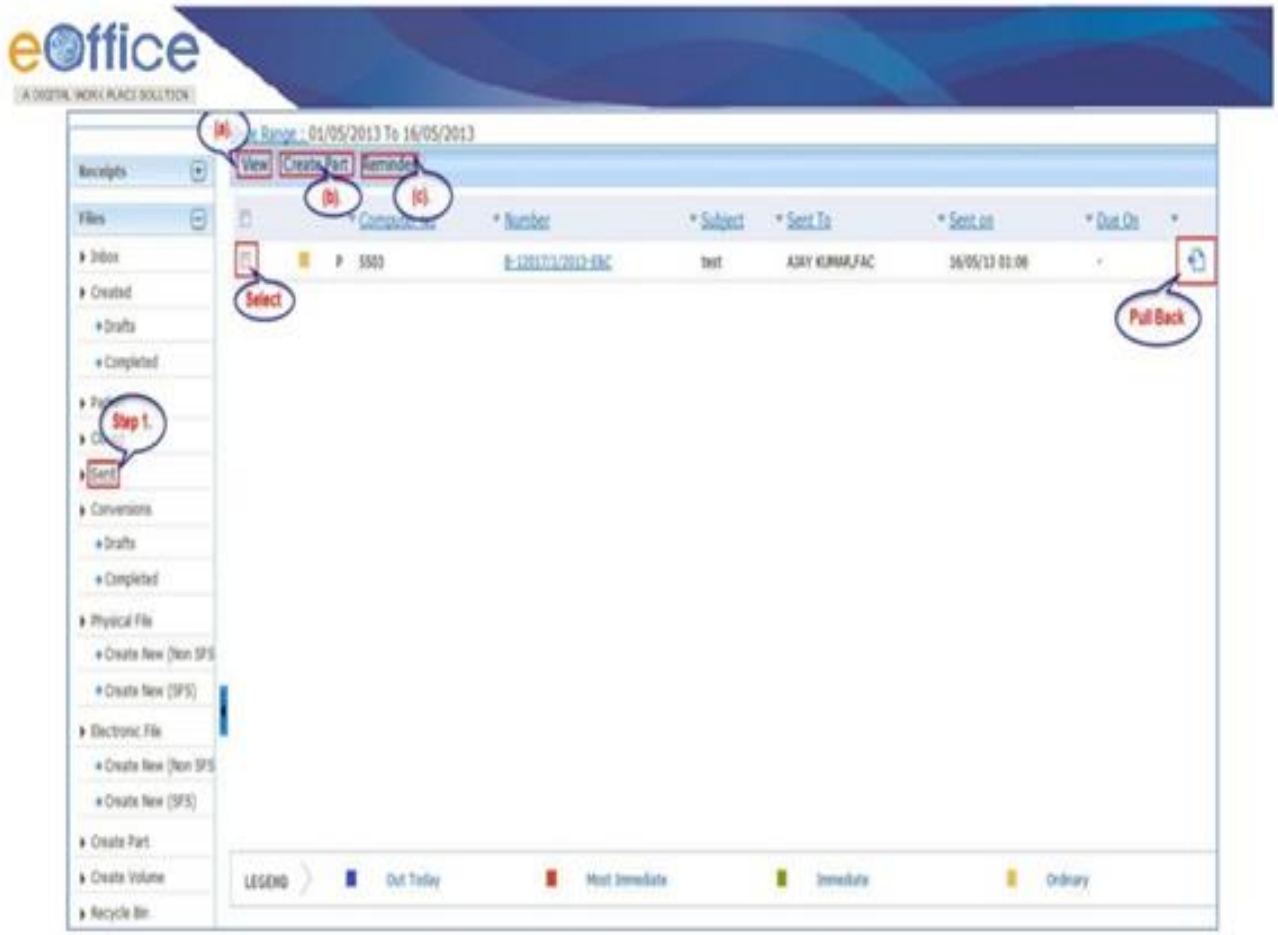
Closed link contains a list of Files that are closed as complete work has been done on it already. Closed Files can be made active at any point of time. Closed link has further 3 links:

- By Me
- By Others (Hierarchy)
- Submitted files for reopening approval



SENT

Sent option contains a list of all the files that are sent as an outward correspondence. User can view all the sent Files, by clicking the Sent link under the Files section. As a result the Sent files screen appears.

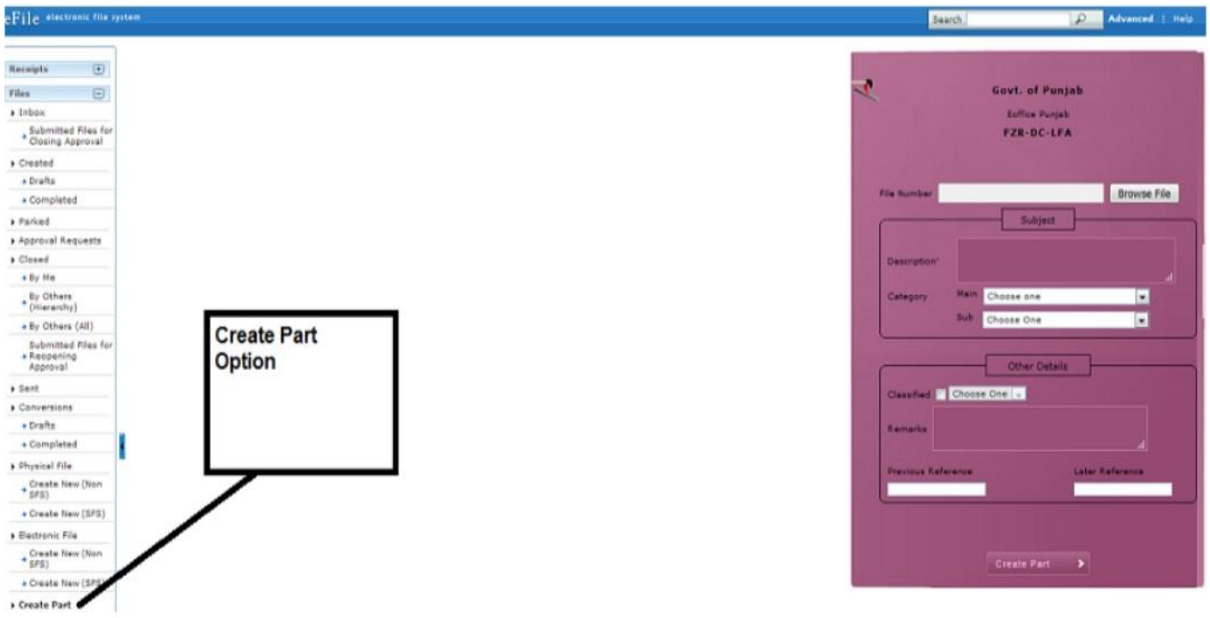


PART FILE

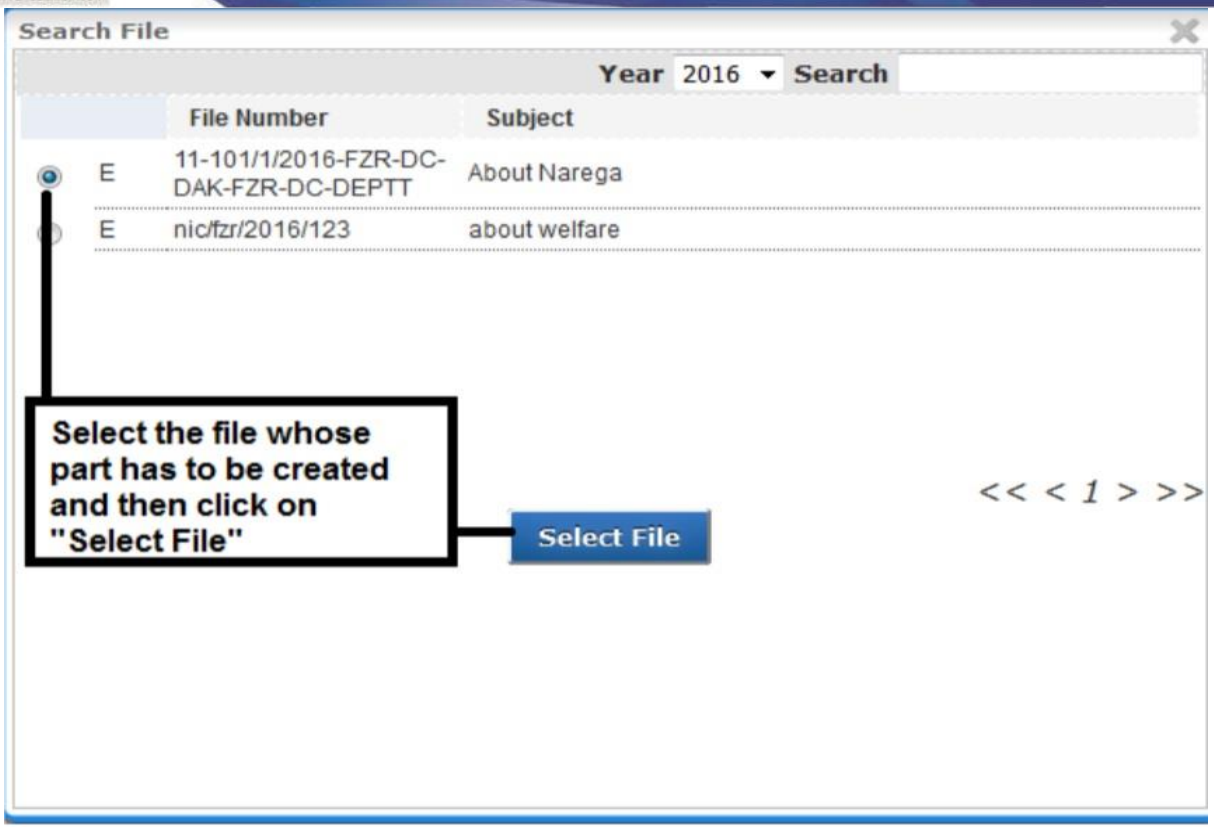
Create part option allows the user to create the part file against the file which is in submission which means that the file is not residing with the working user.

To create a part file

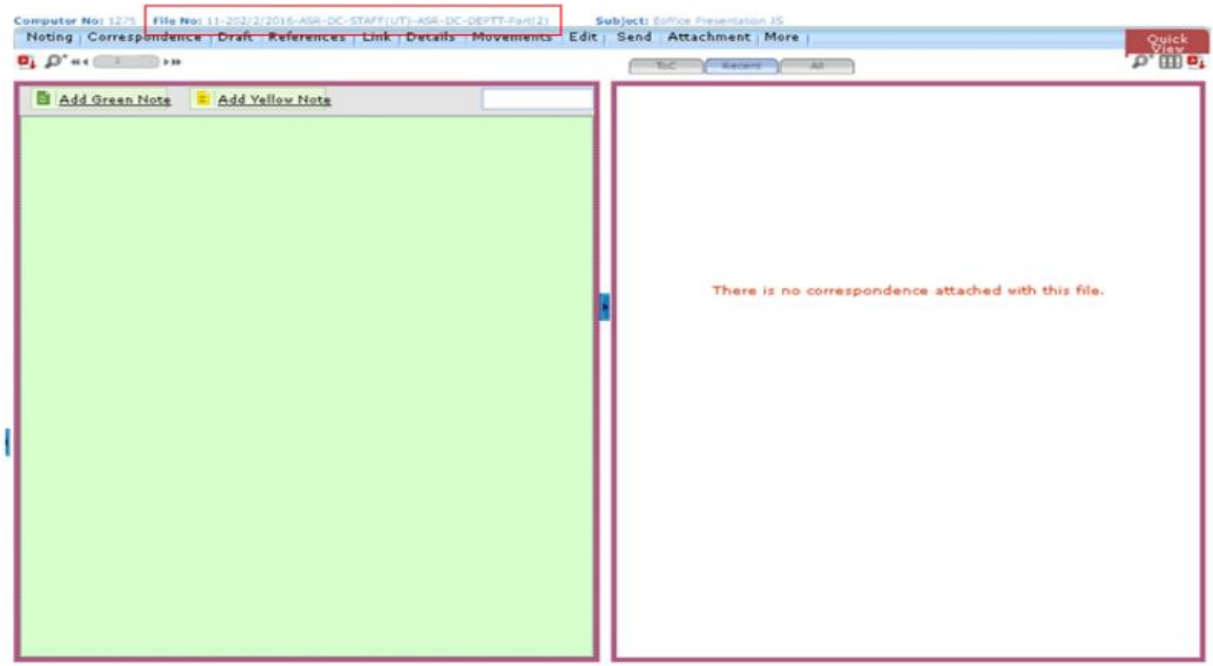
- Click on the Create part under the files section with the result of which following page will appear



- Click on browse file and user has to locate the file of which part has to be created
- Click on the radio buttons to select the particular file for which the part has to be created



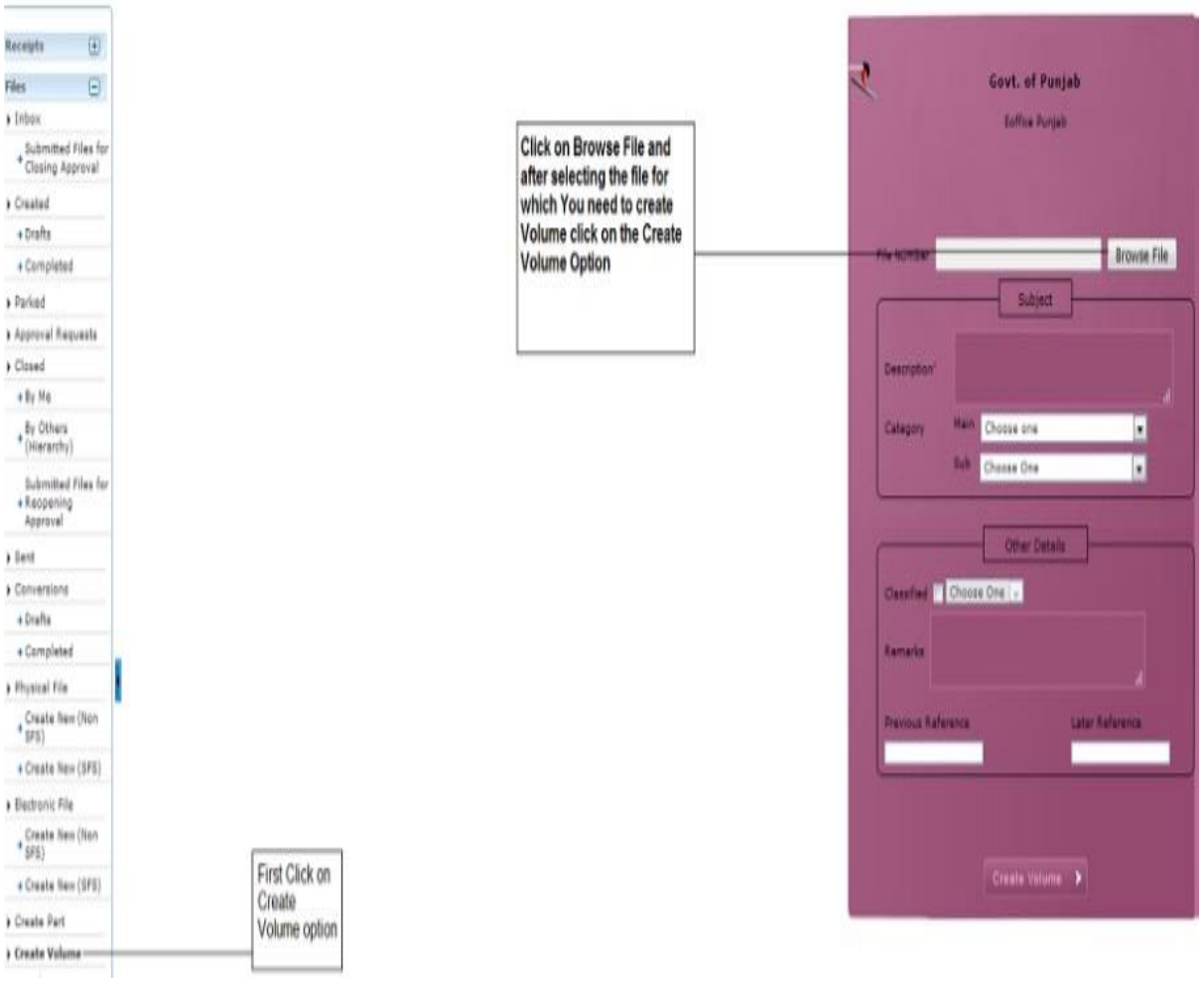
Part file is created and file number contain its name as part with version of part file.



CREATE VOLUME

This option allows the user to create a volume of a file which is residing with him in his Inbox/Draft section. Steps to create a volume are:

- Click on create volume in the file section as a result following page appears
- Click on create volume button which will create volume of file with same file heads.

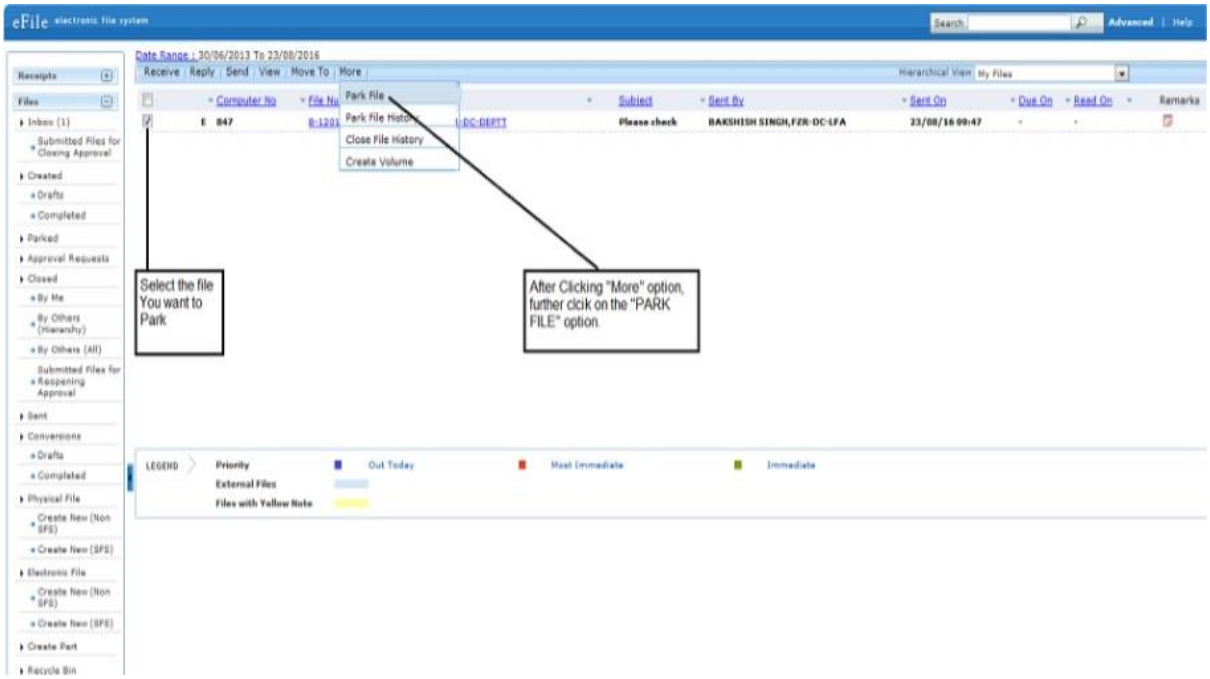


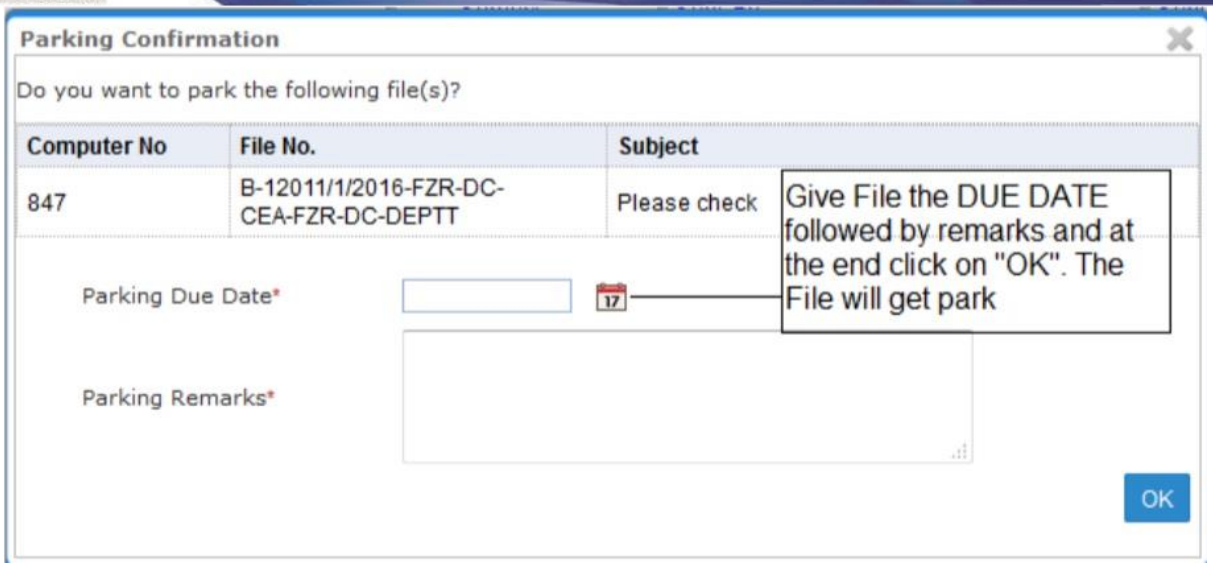
PARK FILES

Park file is one of the most useful options provided in eOffice. Sometimes there are some files which needs to be temporarily closed and the work has to be done later on. In such scenarios parking concept is used, which removes the pendency of the files. Parked files can be made active again at any time.

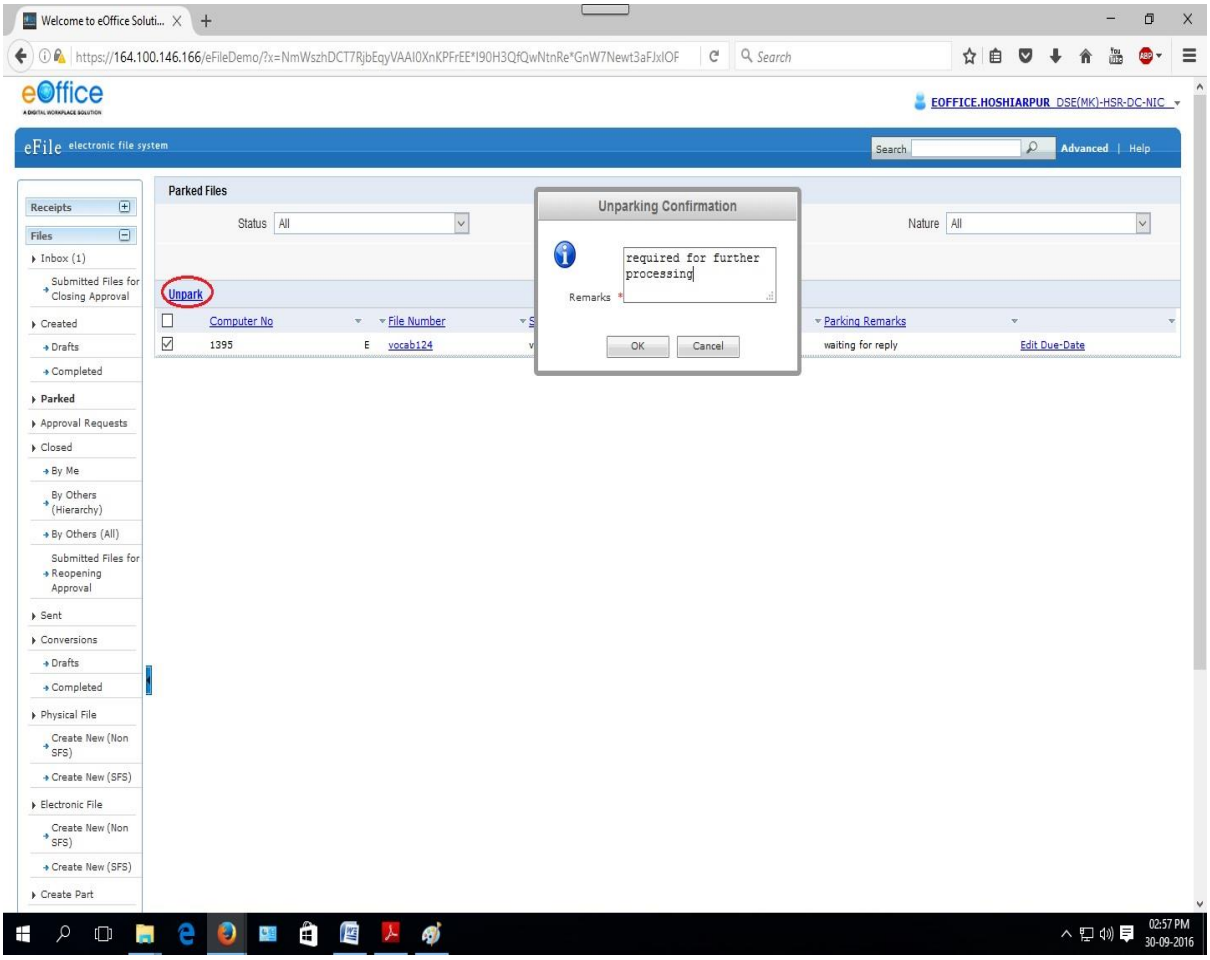
To park a file:

In the Inbox, select the file you want to park and then click on "More" followed by the "Park File" option





To make parked file active user has to perform the following

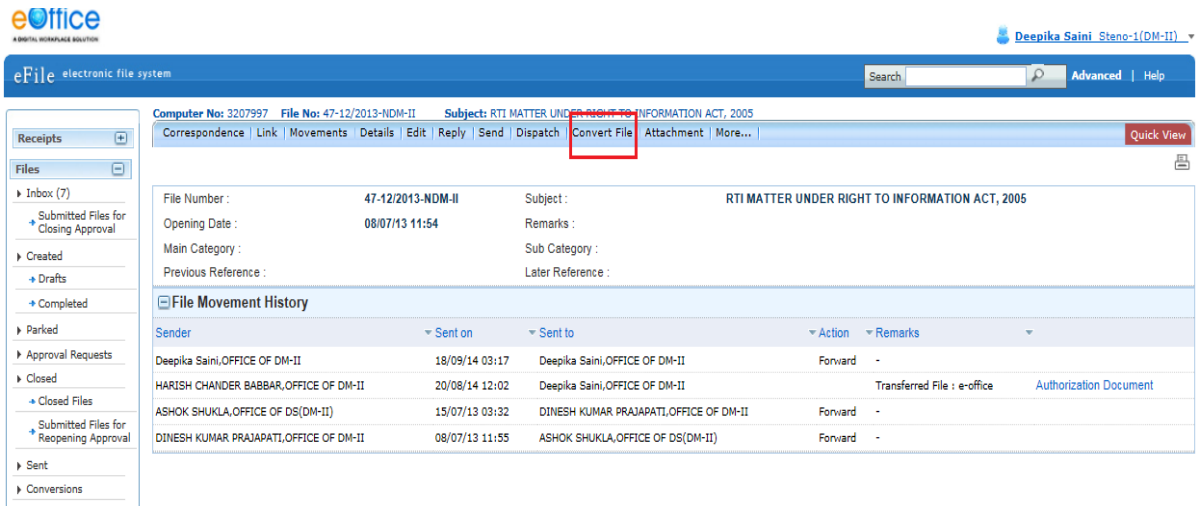


CONVERT FILE

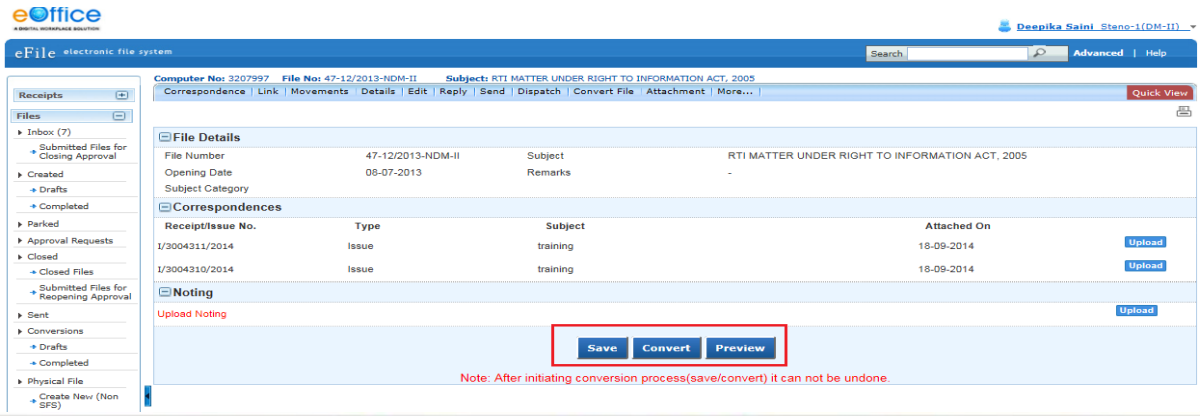
This link helps the user to convert the Physical File to Electronic File only, irrespective of the File location, whether it is attached with a receipt or from the File inbox/Created Section.

To convert a physical file to electronic file, user has to perform following steps:

1. Open the Physical File from the File Inbox Section to convert it into an Electronic File and click the 'Convert File' option



2. As a result following screen appears. Upload the scanned PDF's of Correspondence(s) and Noting(s)



3. After uploading the scanned PDF's, click the 'Save' button, as a result the file moves to the Drafts sub-module of Conversions module under Files section.

4. Click the 'Convert' button, as a result the Nature of the File gets changed i.e. Physical File gets changed to Electronic File.
(If conversion has been done on new physical file then after conversion file moves to Completed sub-module of Created module under File section or else if conversion has been done from File inbox, then after conversion file remains in File inbox.)
If user clicks the 'Save' button, the file will get saved

CONVERSIONS

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

It contains 2 sub modules:

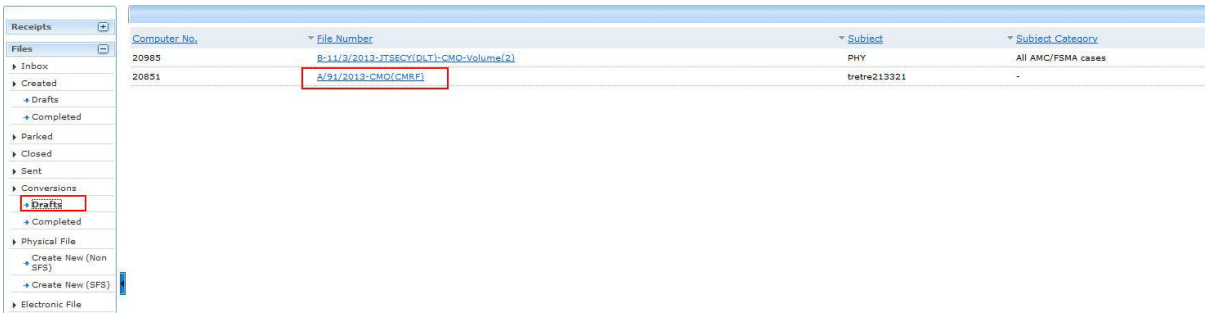
- Drafts
- Completed

Let's learn these modules one by one:

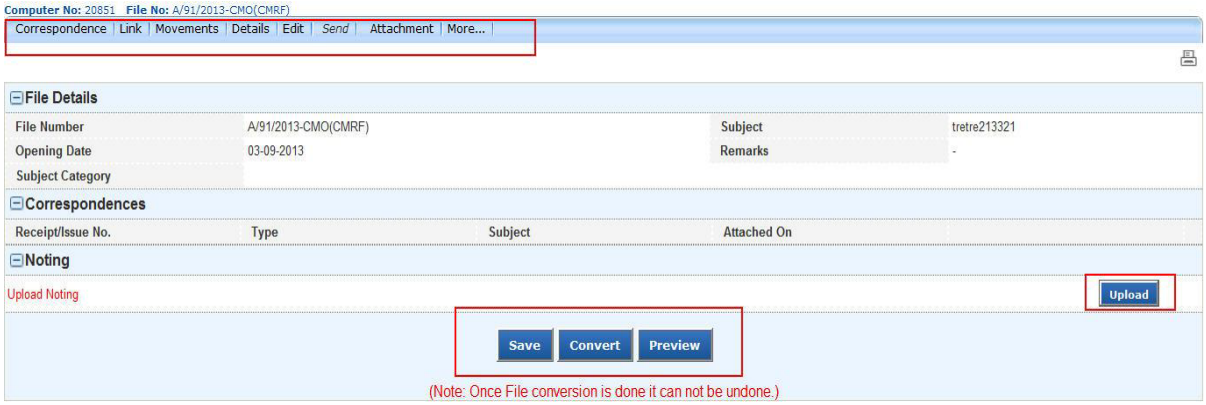
Drafts: This module contains all the Physical files which are in process of conversion but has not been converted so far. During the Conversion process if users clicks the 'Save' button, then files moves under this module.

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

1. Click on Drafts under Conversions section. As a result following page appears:



2. Click on the link under File Number to open the draft. As a result the draft file opens up



3. Under ‘Noting’ section, user can upload a noting document.

4. In order to save the draft, click on Save button.

5. The user can Preview the file prior conversion by clicking on Preview button.

6. Click on Convert button in order to complete the file conversion.

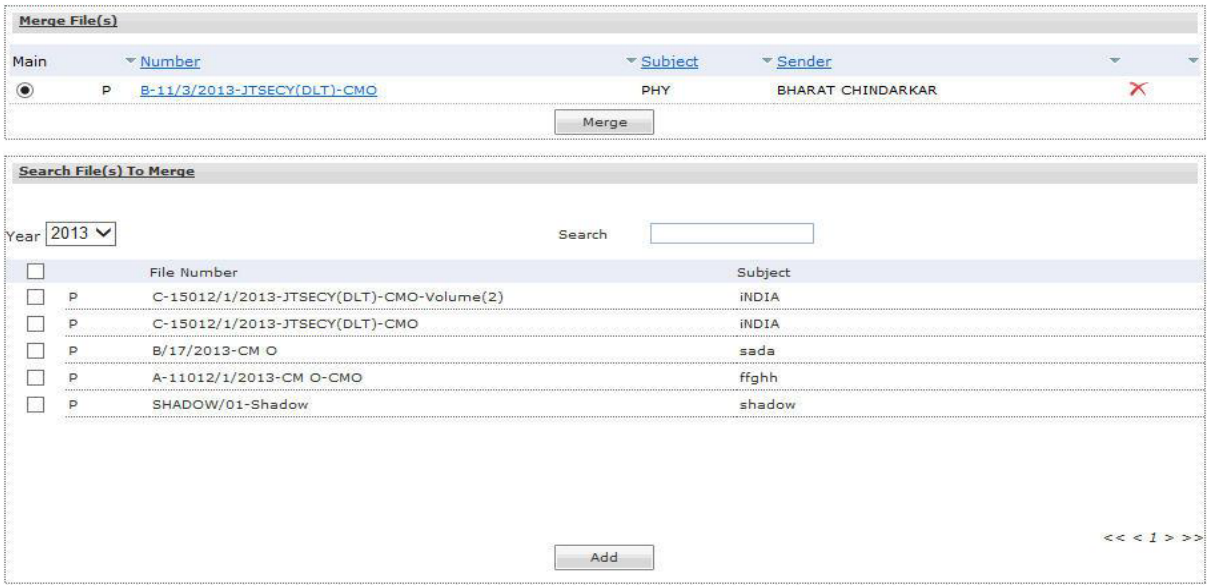
MERGE

This link facilitates the user to merge physical files only. Merged file will be in ‘View only’ mode.

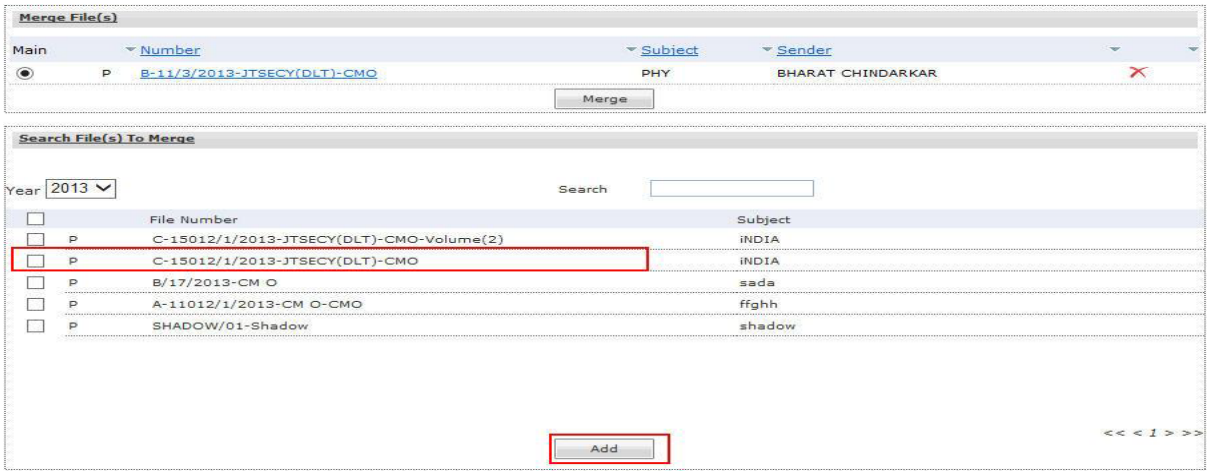
To merge other physical file with the working file, user has to perform following steps:

1. After selecting the File to which other file needs to be merged, move the cursor over More Link and click the Merge Files option.

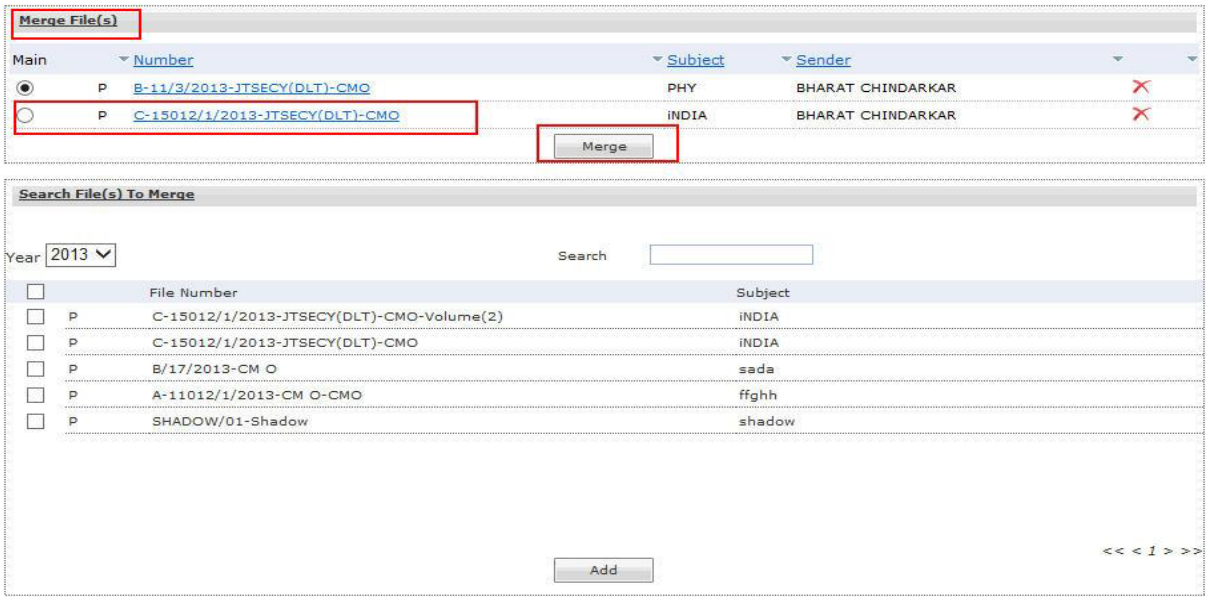
As a result, Merge Files page appear:



2. Search the File from ‘Search File(s) to Merge’ section to merge and click the Add button:



3. As a result, the selected file moves to Merge File(s) section, Click the Merge button to finally merge the selected file to the working file:



4. As a result, Merge Alert appears Enter the reason to merge and click the Ok button

As a result the file gets merged with the working file and appears under Merge Details option under ‘More’ link

MIGRATE FILE

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

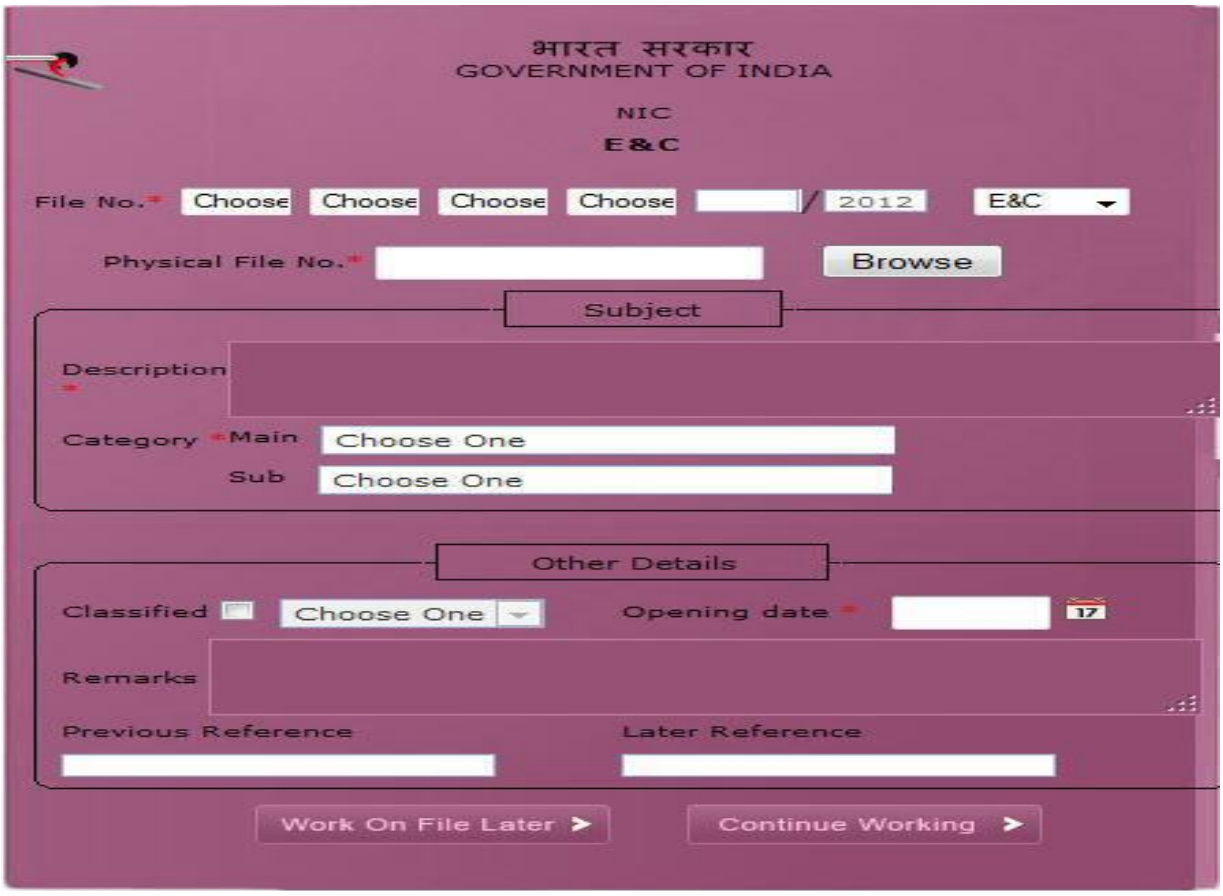
Migrate File link contains 3 sub links:

Create New

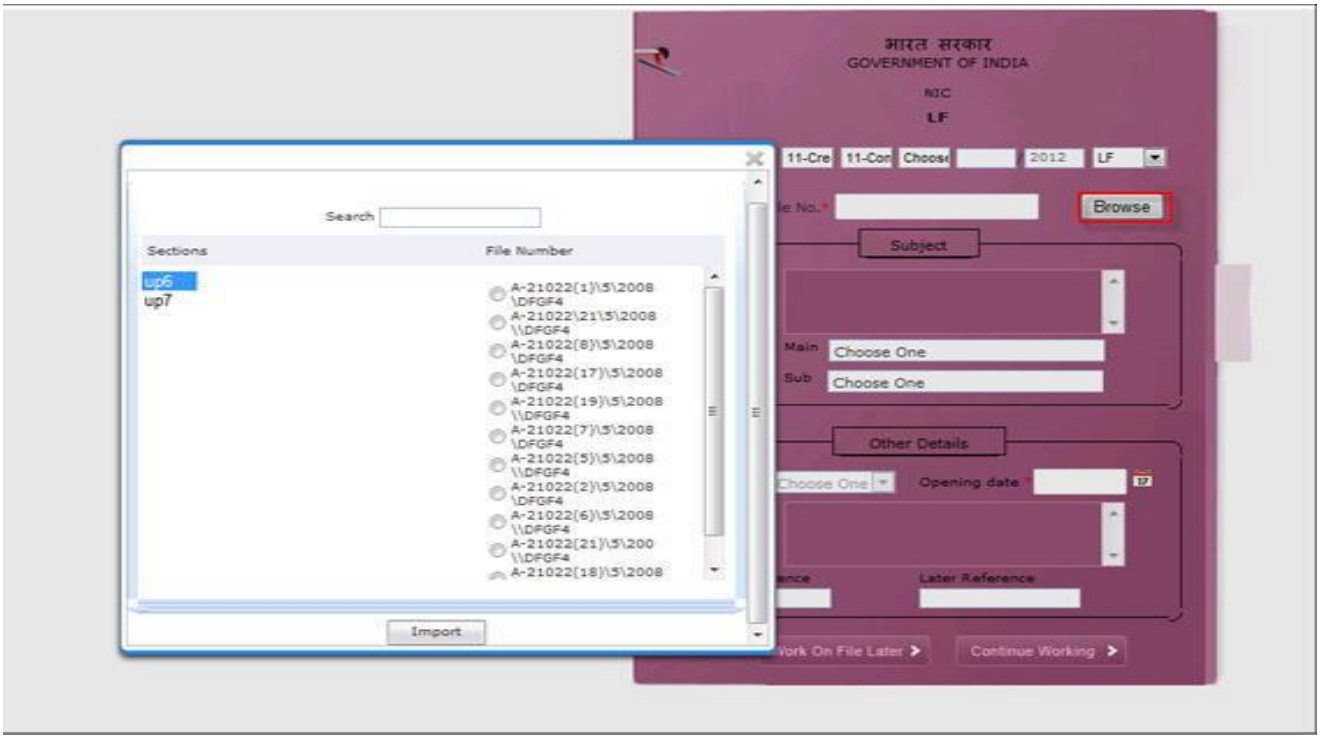
This option helps the user to migrate a new file to the eFile application.

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

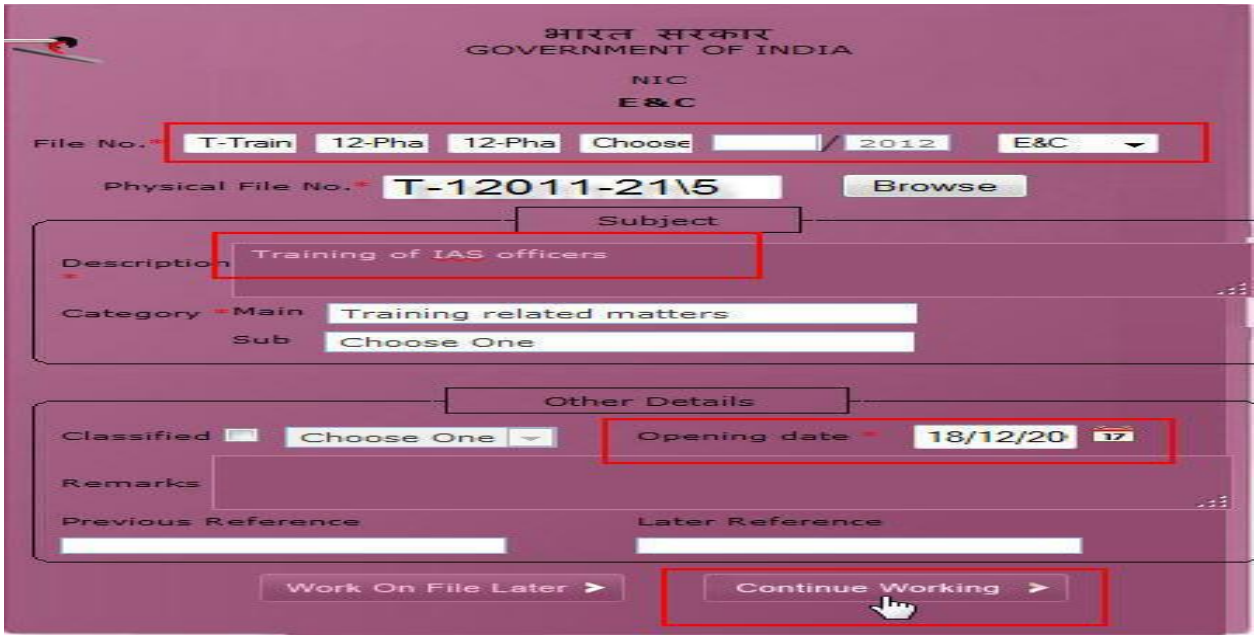
1. Click the create new option under Migrate File link, as a result, Migrate File Cover page appears:



2. Click the Browse button to import the file which needs to migrate:

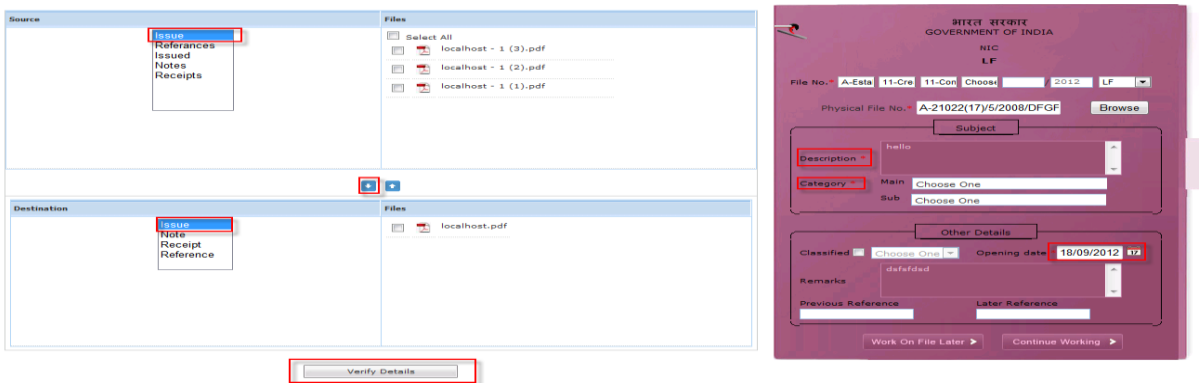


3. Fill all the mandatory fields on cover page of like File No, Description/Subject, Category (Main), and Opening Date:

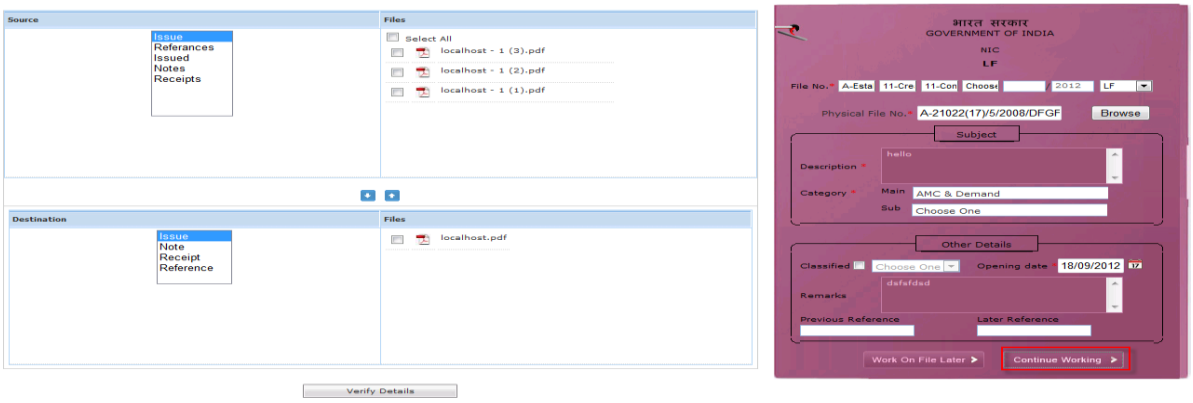


4. A window appears wherein user is supposed to select the Source and Destination files.

Now verify details:



5. Click the Continue Working to generate new file no:



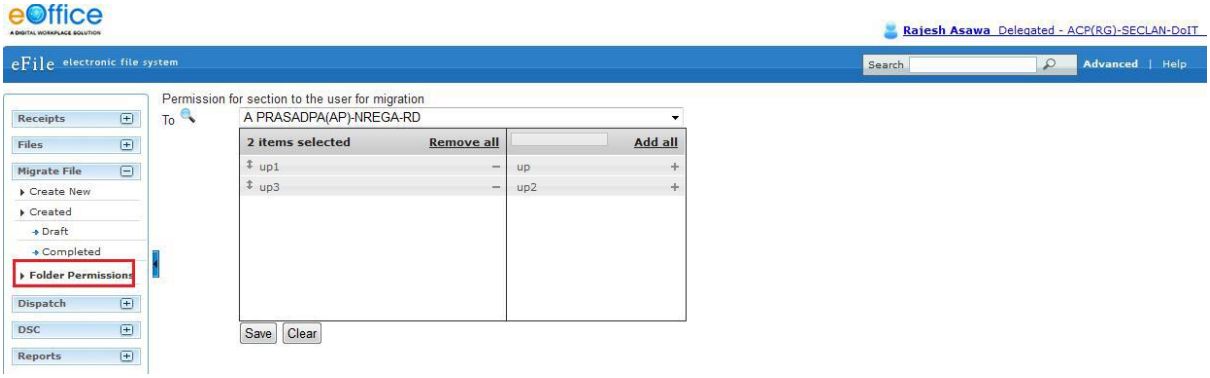
New file number is generated along with Old file no:

FOLDER PERMISSION

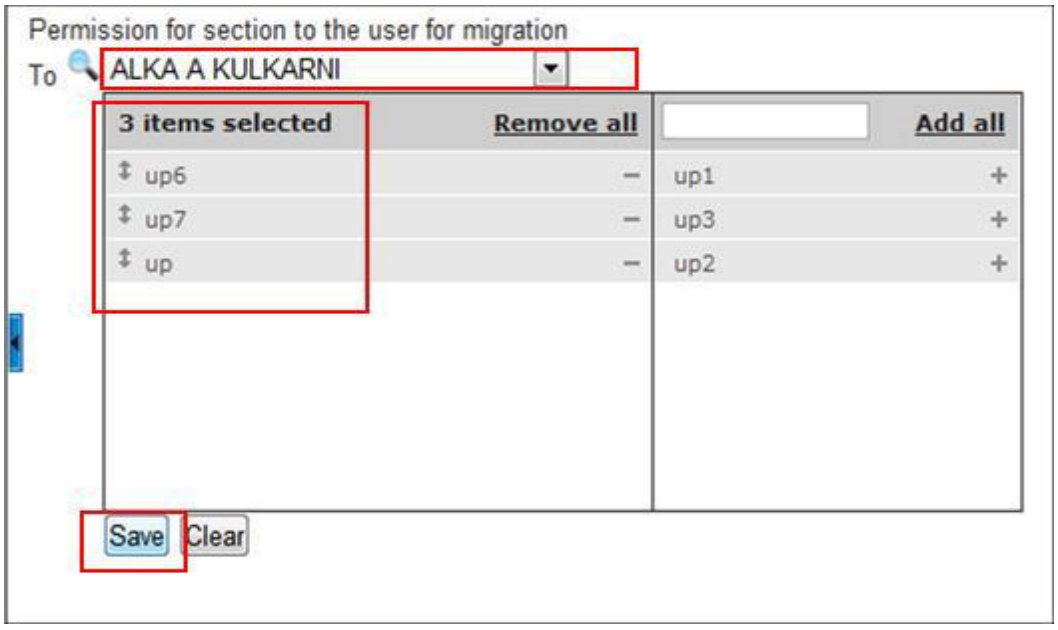
With the help of Folder Permissions, user gets the permission for section required for migration of files.

To provide permission to a user, perform the following:

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



2. Search the user to provide folder permission and click the Save button:



As a result the user gets the folder permission to access the files for migration.

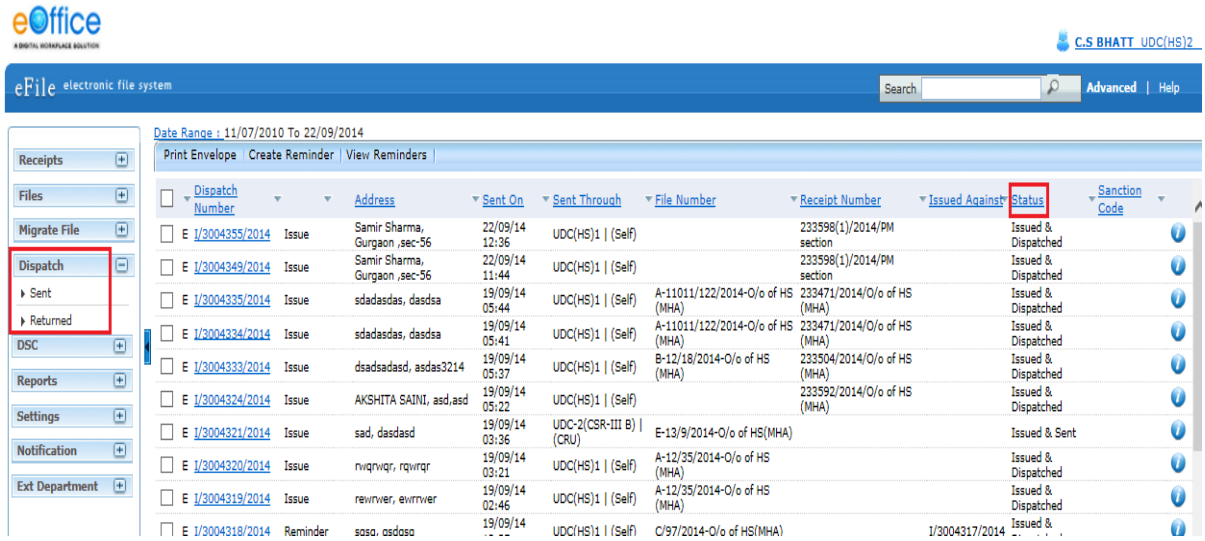
DISPATCH

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

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

- Inbox
- Sent

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

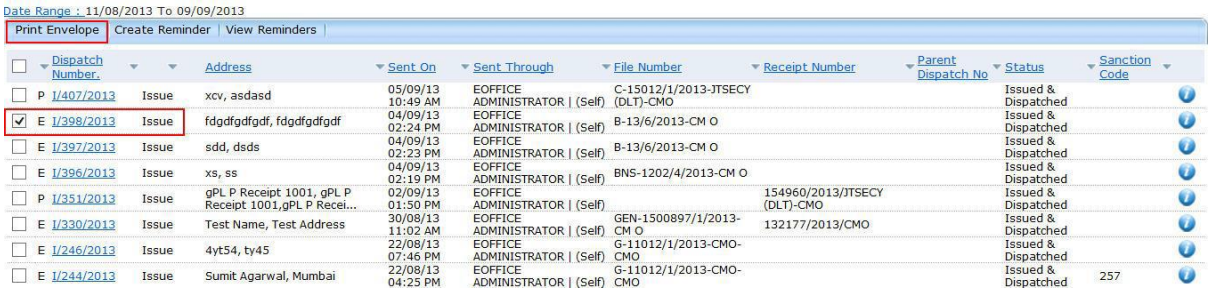


There are 3 links provided under Sent module of Dispatch:

Print Envelope: Helps the user to Print the envelope required for final Physical dispatch.

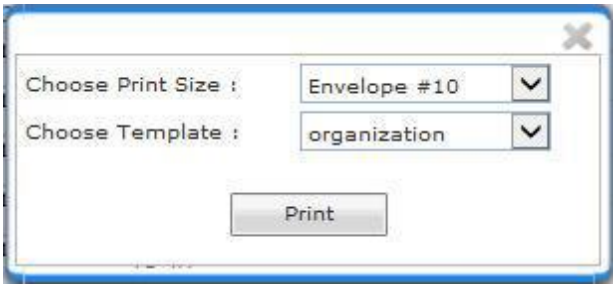
To print the Envelope, user has to perform the following:

1. Select the Sent Issue needs to be printed /dispatched physically and click the 'Print Envelope' link:



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

As a result new window appears asking for Print Size:



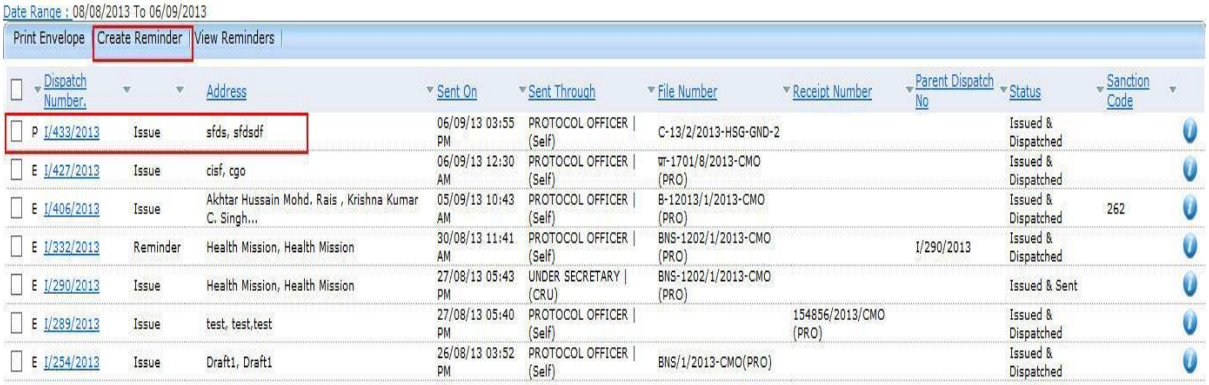
2. Select the Print Size, Template and click the 'Print' button; as a result the issue gets printed.

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

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

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

1. Select the issue to which reminder is to be created and click the Create Reminder button:


Date Range : 08/08/2013 To 06/09/2013

Print Envelope | Create Reminder | View Reminders

	Dispatch Number.		Address	Sent On	Sent Through	File Number	Receipt Number	Parent Dispatch No	Status	Sanction Code	
P	I/433/2013	Issue	sfds, sfdsdf	06/09/13 03:55 PM	PROTOCOL OFFICER | (Self)	C-13/2/2013-HSG-GND-2			Issued & Dispatched		
E	I/427/2013	Issue	cisf, cgo	06/09/13 12:30 AM	PROTOCOL OFFICER | (Self)	ग-1701/8/2013-CMO (PRO)			Issued & Dispatched		
E	I/406/2013	Issue	Akhtar Hussain Mohd. Rais , Krishna Kumar C. Singh...	05/09/13 10:43 AM	PROTOCOL OFFICER | (Self)	B-12013/1/2013-CMO (PRO)			Issued & Dispatched	262	
E	I/332/2013	Reminder	Health Mission, Health Mission	30/08/13 11:41 AM	PROTOCOL OFFICER | (Self)	BNS-1202/1/2013-CMO (PRO)		I/290/2013	Issued & Dispatched		
E	I/290/2013	Issue	Health Mission, Health Mission	27/08/13 05:43 PM	UNDER SECRETARY | (CRU)	BNS-1202/1/2013-CMO (PRO)			Issued & Sent		
E	I/289/2013	Issue	test, test,test	27/08/13 05:40 PM	PROTOCOL OFFICER | (Self)		154856/2013/CMO (PRO)		Issued & Dispatched		
E	I/254/2013	Issue	Draft1, Draft1	26/08/13 03:52 PM	PROTOCOL OFFICER | (Self)	BNS/1/2013-CMO(PRO)			Issued & Dispatched		

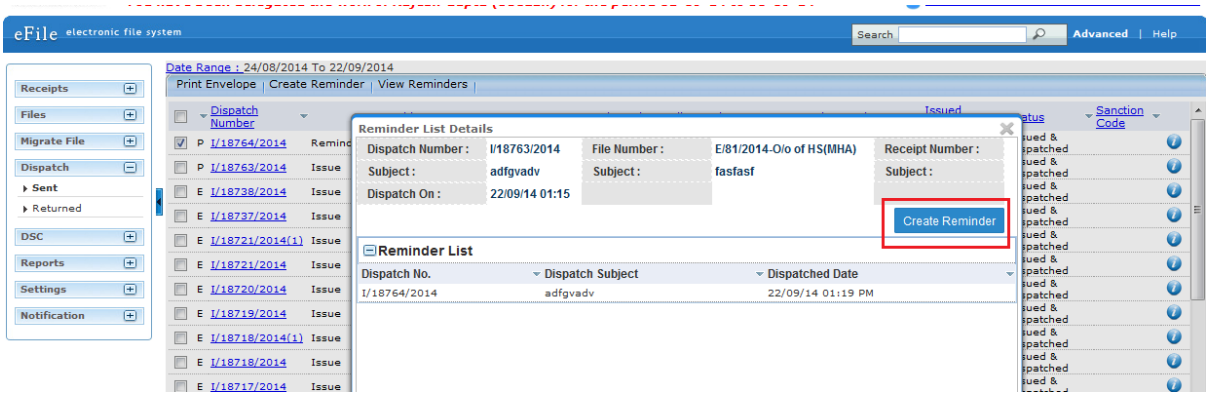
☞ ***For setting up of Reminder, kindly refer to the Reminder Process.***

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

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

1. Select the issue for which reminder needs to be view and click the View Reminder button:

As a result the list of reminders pertaining to the selected issue appears:



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, and passports etc. which serve as proof of identity of an individual.

Following are the two **types** of DSCs recommended for eOffice:

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.

DSC REGISTRATION

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

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

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

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

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

For e-Token Enrolment, perform the following steps:

1. Type the URL of the eOffice application in the address bar of the web browser.

2. Press Enter from the keyboard.

3. A window appears, displaying the login page for eOffice

4. Type the User id in the User Name text box.

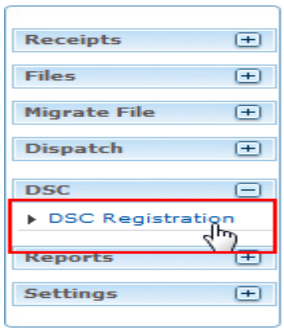
5. Type the password in the Password text box.

6. Click the Login button:

7. As a result, the user gets successfully log into the eOffice application.

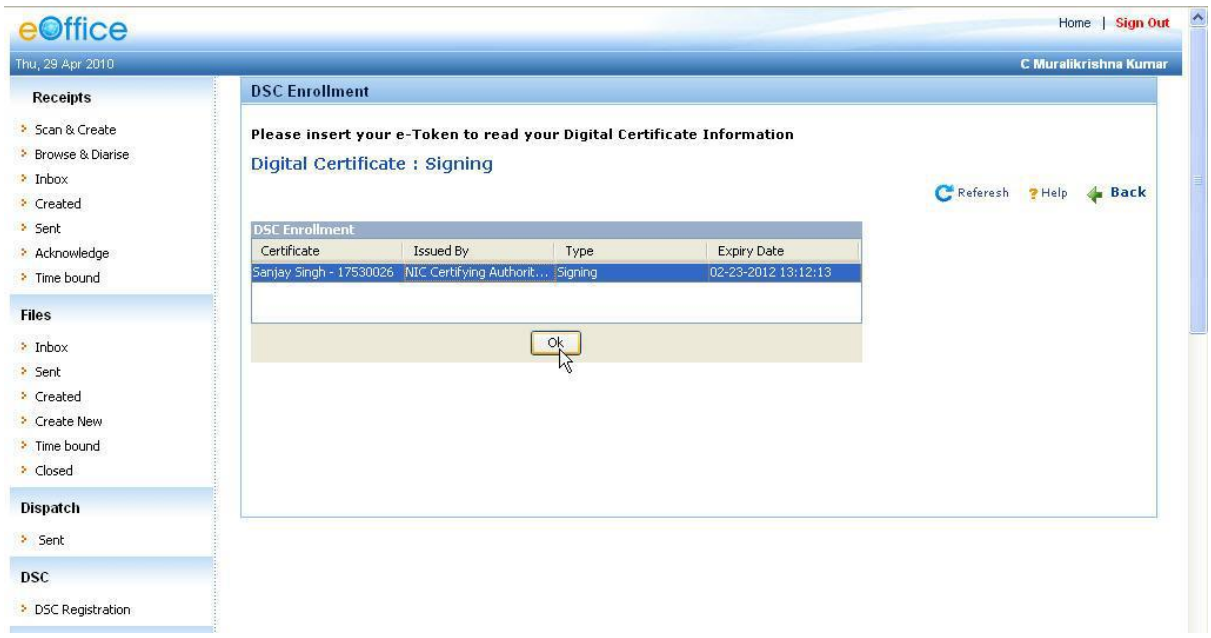
8. Plug-In the e-token in your machine/system.

9. Click the DSC Registration link under the DSC section



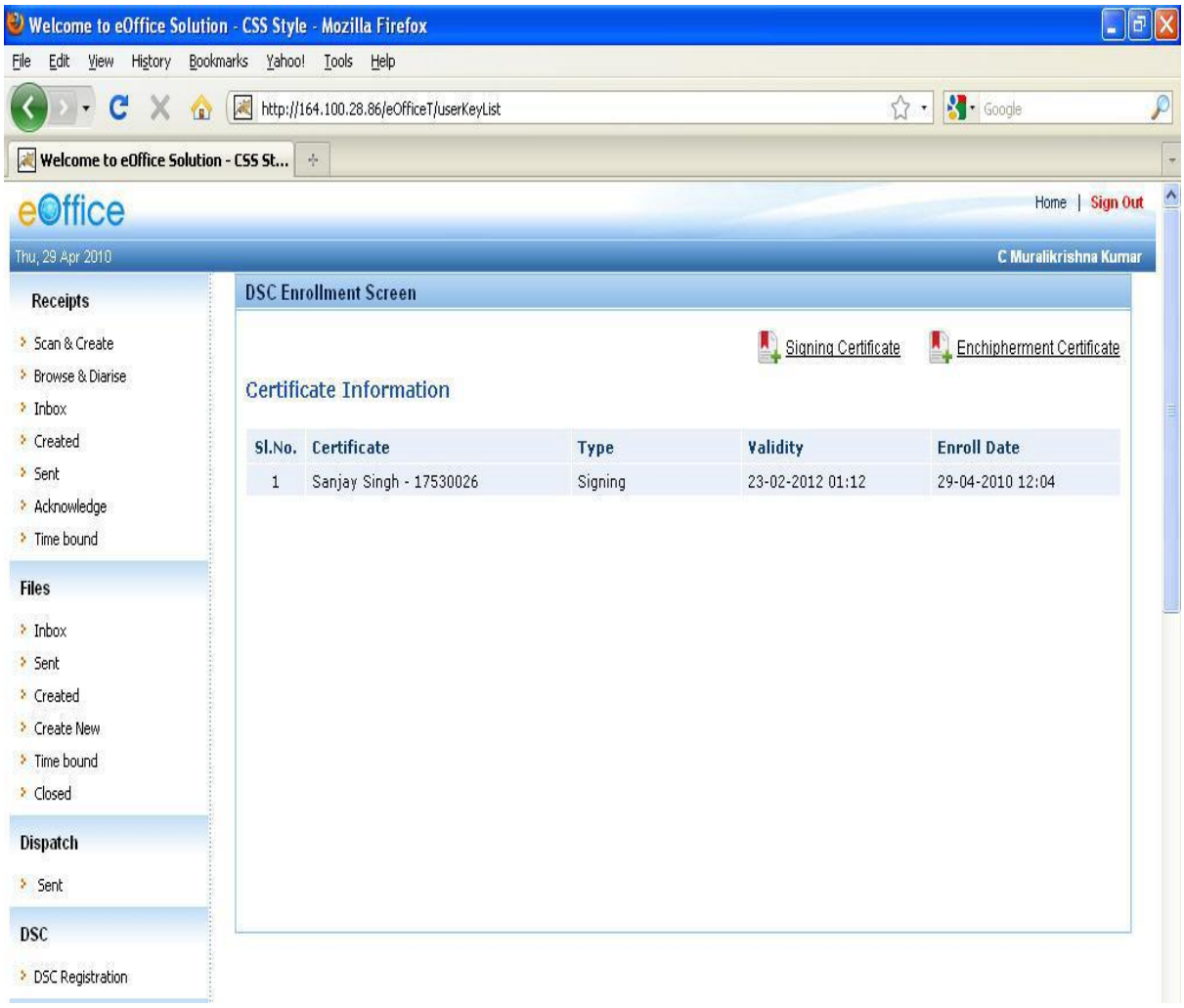
10. As a result, the DSC Enrolment Screen appears:

11. Click the Signing Certificate link in the DSC Enrolment Screen. As a result, the DSC Enrolment screen appears. Select the certificate for enrolment and click the OK button:



12. The Message box appears, displaying the message for successful enrolment of the eOffice user:

13. Click the 'OK' button to complete the process of DSC enrolment:



For e-Token Authentication, perform the following:

1. Plug in the e-token device in your system.

2. Type the URL of the eOffice application in the address bar of the web browser.

3. Press Enter from the keyboard.

4. A window appears, displaying the login page for eOffice.

5. Type the User id in the User Name text box.

6. Type the Password in the Password text box.

7. Click the Login button, as a result, the Log On dialog box appears, prompting for password above the DSC Authentication screen.

8. Type the password in the Password field in the Log On screen.
Note: User can enter the wrong password only 10 times. Thereafter if the wrong password is entered, the user gets blocked.

9. Click the OK button. As a result, the user gets log into the eOffice application.

For DSC Card Enrolment, perform the following:

1. Type the URL of the eOffice application in the address bar of the web browser.

2. Press Enter from the keyboard.

3. A window appears, displaying the login page for eOffice.

4. Type the User id in the User Name text box.

5. Type the password in the Password text box.

6. Click the Login button.

7. Plug-In the e-token in your machine/system, as a result, the user gets successfully log into the eOffice application.

8. Click the DSC Registration link under the DSC section. As a result, the DSC Enrolment Screen appears.

9. Click the Signing Certificate link in the DSC Enrolment Screen. As a result, Enter Pin dialog box appears.

10. Enter the pin in the Enter Pin text box in the Enter PIN dialog box.

11. Click the OK button. As a result, the DSC Enrolment screen appears.

For DSC Card Authentication, perform the following:

1. Plug in the DSC card in your system.

2. Type the URL of the eOffice application in the address bar of the web browser.

3. Press Enter from the keyboard.

4. A window appears, displaying the login page for eOffice.

5. Type the User id in the User Name text box.

6. Type the password in the Password text box.

7. Click the Login button.

8. As a result, the Enter PIN dialog box appears, as shown in Fig.eFile.223:

9. Type the password in the Enter PIN dialog box and click the OK button. As a result, the user gets logged into the eOffice application.