



A DIGITAL WORK PLACE SOLUTION

eFile

File Management Quick Start



Prepared by
National Informatics Centre

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Introduction

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

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

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

eFile Modules

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

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

Receipts

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

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

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

Browse & Diarise

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

1. Physical
2. Electronic

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

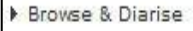
1. **Electronic:** In Electronic Module the browsing or uploading of the scanned document is mandatory and then the Diarisation of scanned correspondence is done.
2. **Physical:** In Physical Module the browsing or uploading of the scanned document is not mandatory, only the Diarisation of the received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

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

Classification levels are

- Normal
- Confidential
- Secret
- Top Secret

To browse and diarise the electronic receipts user has to perform the following steps:

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

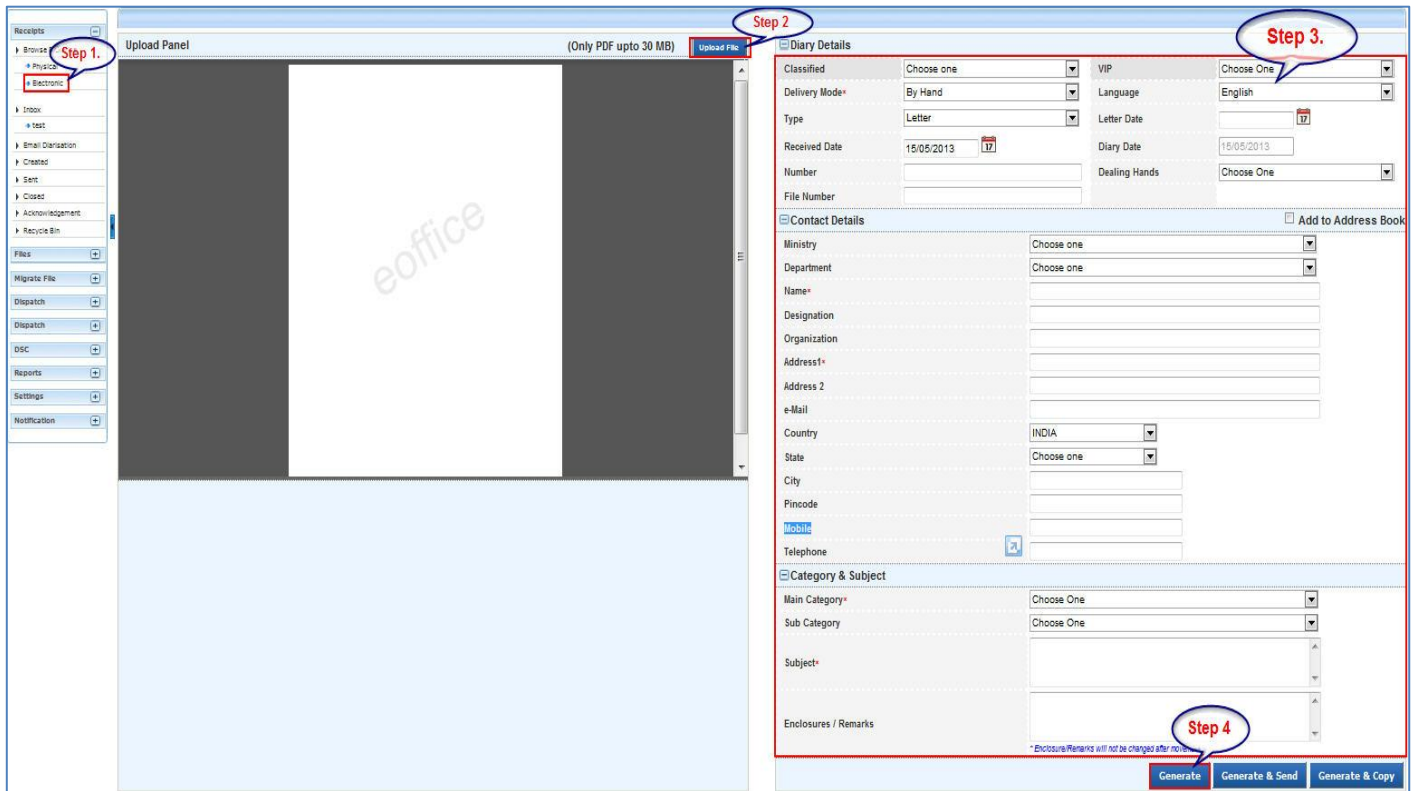





Fig.eFile.1

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

2. Select the Receipt and Click the Upload File () button from the **Browse and Diarise** screen to upload the scanned receipt.
3. Enter the essential details in all the mandatory fields in **Browse and Diarise** Page.
4. Click the **Generate** () button (Fig.eFile.5) on **Browse and Diarise** page to generate a **unique Diary number**.

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


- a) **Send to Draft:** User can use this option to send the generated receipt to the **Created** section to work at a later stage.
- b) **Movements:** User can use this option to track the **Movements** of the receipt which automatically gets updated as Receipt moves further.
- c) **Details:** User can use this option to view the details of the generated receipts such as **Dispatch History, Referenced files, Referenced Receipts and Detach Receipts.**
- d) **Edit:** User can use this option to edit the Metadata fields of the Receipt before sending it to the intended recipient.
- e) **Forward:** User can use this option to forward the receipt to the intended recipient.

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

User could also see the remarks on the receipt through remarks blue icon along .Reply or forward action can be done from here.

- f) **Put in a File:** User can use this option to attach the generated receipt to a concerned file.

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

- g) **Copy:** User can use this option to copy the metadata fields automatically and send it to other eOffice user(s). User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' () button a new Receipt number will be allocated to the copied receipt.
- h) **Dispatch:** User can use this option to Dispatch the electronic receipt.
- i) **Attach File:** User can use this option to attach the receipt with the File.
- j) **Attach Receipt:** User can use this option to attach the working receipt/ document with the other Receipt(s)/ Document(s) irrespective of the receipt nature. This link is visible when user opens the receipt from Receipt Inbox/ Created.

Physical Receipt/ Document can be attached with in an Electronic Receipt and Vice-Versa.

Also, the receipt attached with other receipts can be send to only one user at a time.

Browse and Diarise Process of Physical File

Refer to Browse and Diarise process of Electronic Receipt, In Physical Receipt just the Browsing and Uploading of Correspondence is Non- Mandatory, rest of the process is same.

Inbox

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

User has to click the Receipt number to view the receipt. As a result, the user can view the content of receipt along with the details.

Nature of Receipt can be verified from the character 'E' and 'P' which is written before the receipt number.

Character 'E' symbolizes Electronic Receipt whereas character 'P' symbolizes Physical Receipt.

There are 10 Links provided under Receipt Inbox:

- a) **Receive:** This link helps the user to receive the **Physical** Receipt. Without receiving the physical receipt user cannot perform any action on that particular receipt as shown in the Fig.eFile.2:

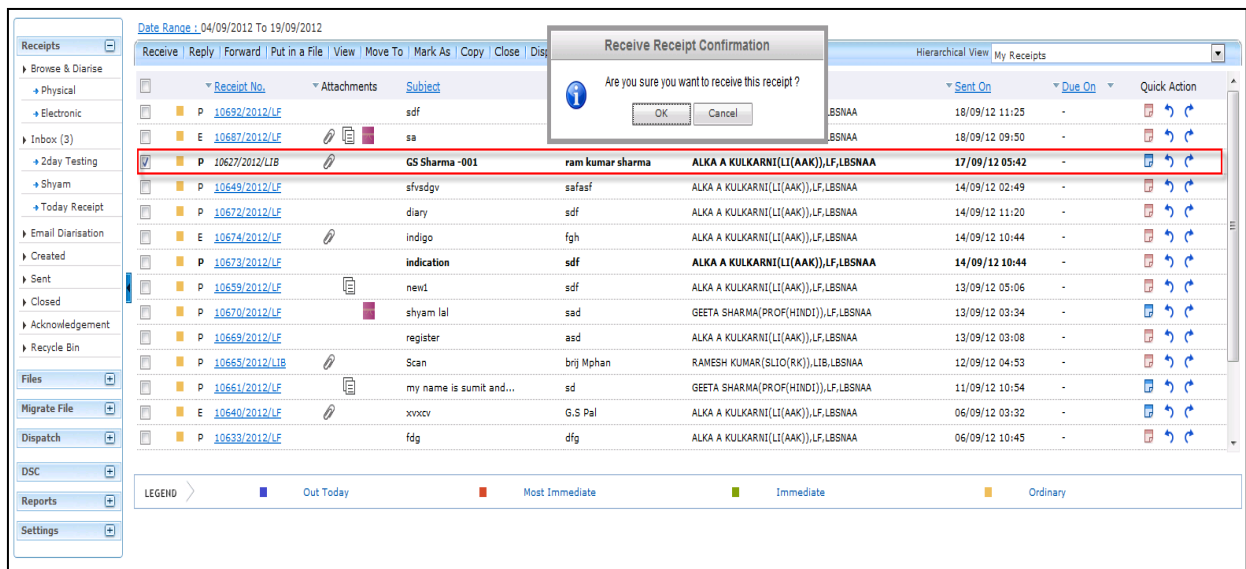


Fig.eFile.2

- b) **Reply:** This link helps the user to reply to the sender of the Receipt.
- c) **Forward:** This link helps the user to forward a particular receipt/s to one or more recipients at a time.

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

- d) **Put in a File:** This link helps the user to attach a receipt/s to a concerned file.

- e) **View:** This link helps the user to list the receipts depending upon its current state. i.e. (Unread, Read, Followed Up, Physical, Electronic, All).
- **Unread-** Click the **Unread** from the dropdown menu to view **unread receipts**.
 - **Read-**Click the **Read** from the dropdown menu to view **read receipts**.
 - **Followed Up-**Click the **Followed Up** from the dropdown menu to view the receipts on which the user has marked a follow up.
 - **Physical-**Click the **Physical** from the dropdown menu to view the Physical nature receipts.
 - **Electronic-**Click the **Electronic** from the dropdown menu to view the Electronic nature receipts.
 - **ALL-**Click the **ALL** from the dropdown menu to view the All receipts altogether.
- f) **Move To:** This link helps the user to create **New Folders** and manage **Existing Folders**.
- **My Folders-** Click the **My Folders** link from the dropdown menu to view the Receipt inbox and its subfolders.
 - **Manage Folders-** Click the **Manage Folders** link from the dropdown menu to **Delete** or **Edit** the folders created under Receipt Inbox.
 - **Create New Folder-** Click the **Create New Folder** link from the dropdown menu to create a new folder
- g) **Mark As:** This link helps the user to create a **New Follow Up** which keeps a track of a receipt, by alert mode, follow up action and specifying time to receive follow up on any corresponding receipt and also '**Mark As**' option helps to **remove** the existing follow up.
- h) **Copy:** This link helps the user to copy the metadata fields automatically and send it to other eOffice user. User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' button a new Receipt no. will be allocated to the copied receipt.
- i) **Close:** This link helps the user to close a receipt.

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

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

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

- If user selects '**Dispatch By Self**' option, then the physical receipt will be dispatched that same moment and also the receipts gets closed and moves to '**Closed**' section of receipt.
- If user selects '**Dispatch By CRU**' option, a popup appears. Popup contains the list of all the users mapped with CRU section (if any), **Delivery Mode** and **Remarks**, as shown in Fig.eFile.61:

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

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

There is 1 additional link provided when opening up an Electronic receipt as compared to Physical receipt:

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

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

Email Diarisation

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

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

1. Click the **NIC email** link, as shown in Fig.eFile.3:

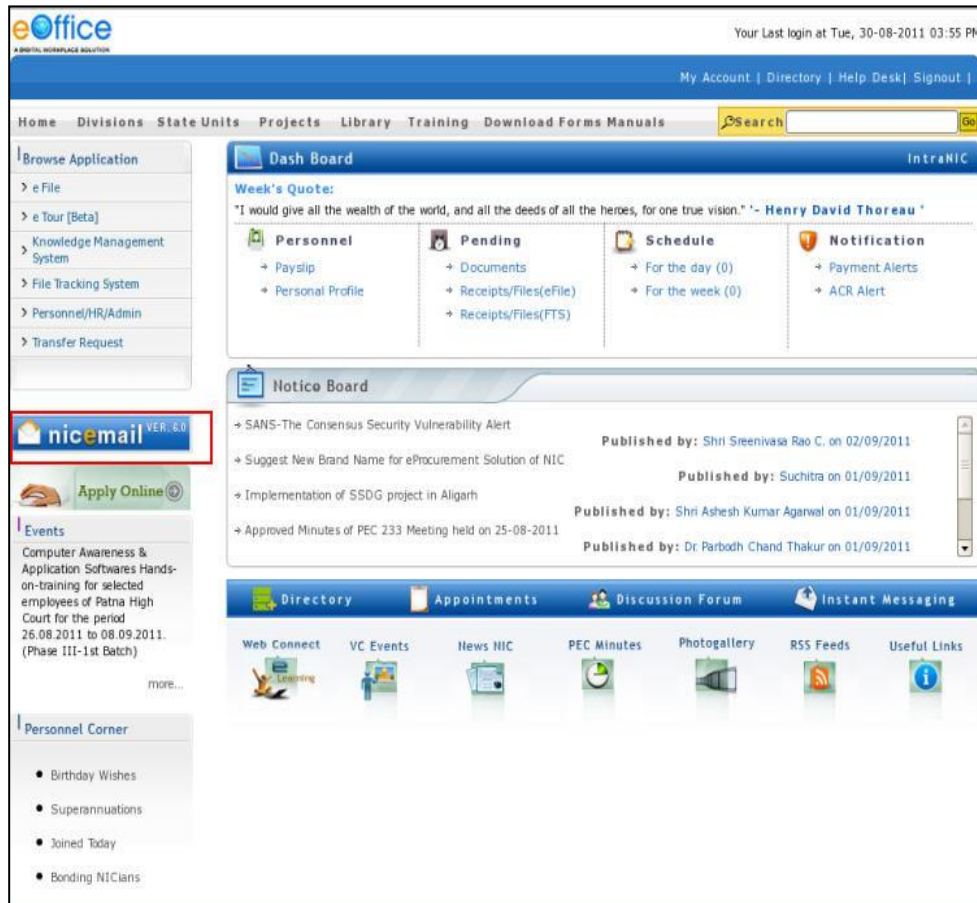


Fig.eFile.3

As a result, **NIC email** opens.

2. Select the Receipt which needs to be moved to eFile Application, as shown in Fig.eFile.4:

The screenshot shows the eoffice webmail interface. On the left is a 'Compose Mail' sidebar with folders like INBOX (4089), SentMail (1292), and TrashCan (17). The main area displays an 'INBOX' table with columns for Subject, From, Date, and eFile Status. The first row is selected and highlighted with a red border.

	Subject	From	Date	eFile Status
<input checked="" type="checkbox"/>	Re: Systems to be moved to the new location/S/W st...	Kapil	14:25	Not Sent
<input type="checkbox"/>	Details of eoffice machines	shobhit rawat	14:09	Not Sent
<input type="checkbox"/>	Fwd: Systems to be moved to the new location/S/W s...	Kapil	11:24	Not Sent
<input type="checkbox"/>	RE: [Dns-request] Request for URL Mapping	divya	10:46	Not Sent
<input type="checkbox"/>	Re: Re: Regd: Eoffice application for north24 pag...	sandeep jand	10:40	Not Sent
<input type="checkbox"/>	Re: Regarding Two Servers in IDC	Kapil	10:37	Not Sent
<input type="checkbox"/>	eLeave Script	jankit tomar	10:18	Not Sent
<input type="checkbox"/>	Guidelines New	sandeep jand	04:10	Not Sent
<input type="checkbox"/>	Dummy instance for Punjab	sandeep jand	02:24	Not Sent
<input type="checkbox"/>	Request for URL Mapping	Saroj Kumar Patro	Sep 01, 2011 04:07 PM	Not Sent

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Fig.eFile.4

3. Click the **Move To eFile** button to move the selected receipt to eFile application, as shown in Fig.eFile.5:

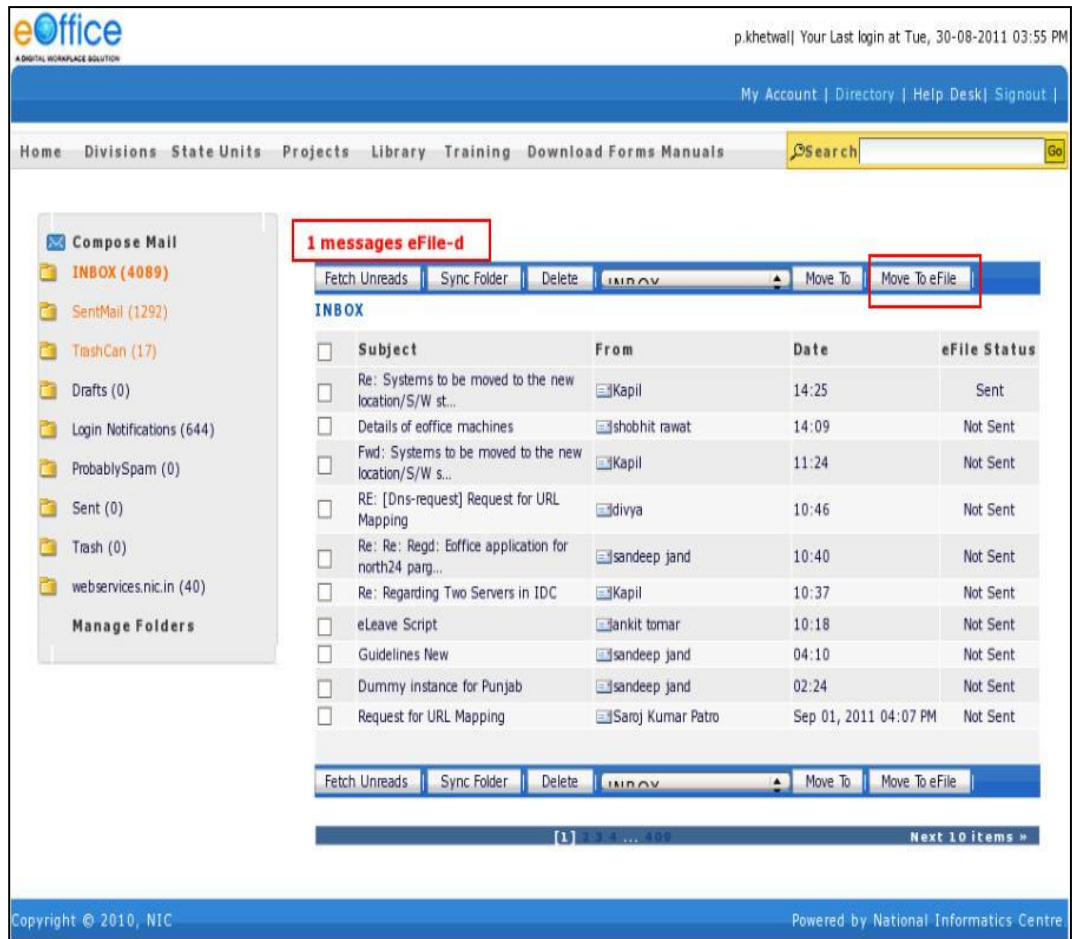


Fig.eFile.5

As a result, sent message appears at top (Fig.eFile.5).

4. Click the **Home** Button to move to the **Home Page** of eOffice Portal, as shown in Fig.eFile.6:

The screenshot shows the eOffice portal interface. At the top left is the eoffice logo. The top right shows the user name 'p.khetwal' and the last login time 'Tue, 30-08-2011 03:55 PM'. Below this is a navigation bar with links for 'My Account', 'Directory', 'Help Desk', and 'Signout'. A secondary navigation bar contains 'Home', 'Divisions', 'State Units', 'Projects', 'Library', 'Training', and 'Download Forms Manuals'. The 'Home' button is highlighted with a red box. To the right of this bar is a search box with a 'Go' button. The main content area is divided into two sections. On the left is a 'Compose Mail' sidebar with folders like 'INBOX (4089)', 'SentMail (1292)', 'TrashCan (17)', 'Drafts (0)', 'Login Notifications (644)', 'ProbablySpam (0)', 'Sent (0)', 'Trash (0)', and 'webservice.nic.in (40)'. On the right, there is a section titled '1 messages eFile-d' with a toolbar containing 'Fetch Unreads', 'Sync Folder', 'Delete', a dropdown menu set to 'INBOX', 'Move To', and 'Move To eFile'. Below this is an 'INBOX' table with columns for 'Subject', 'From', 'Date', and 'eFile Status'. The table contains 11 rows of email entries. At the bottom of the page, there is a footer with 'Copyright © 2010, NIC' on the left and 'Powered by National Informatics Centre' on the right.

Subject	From	Date	eFile Status
Re: Systems to be moved to the new location/S/W st...	Kapil	14:25	Sent
Details of eoffice machines	shobhit rawat	14:09	Not Sent
Fwd: Systems to be moved to the new location/S/W s...	Kapil	11:24	Not Sent
RE: [Dns-request] Request for URL Mapping	divya	10:46	Not Sent
Re: Re: Regd: Eoffice application for north24 par...	sandeep jand	10:40	Not Sent
Re: Regarding Two Servers in IDC	Kapil	10:37	Not Sent
eLeave Script	jankit tomar	10:18	Not Sent
Guidelines New	sandeep jand	04:10	Not Sent
Dummy instance for Punjab	sandeep jand	02:24	Not Sent
Request for URL Mapping	Saroj Kumar Patro	Sep 01, 2011 04:07 PM	Not Sent

Fig.eFile.6

As a result, Home Page of eOffice Portal appears as shown in Fig.eFile.7:

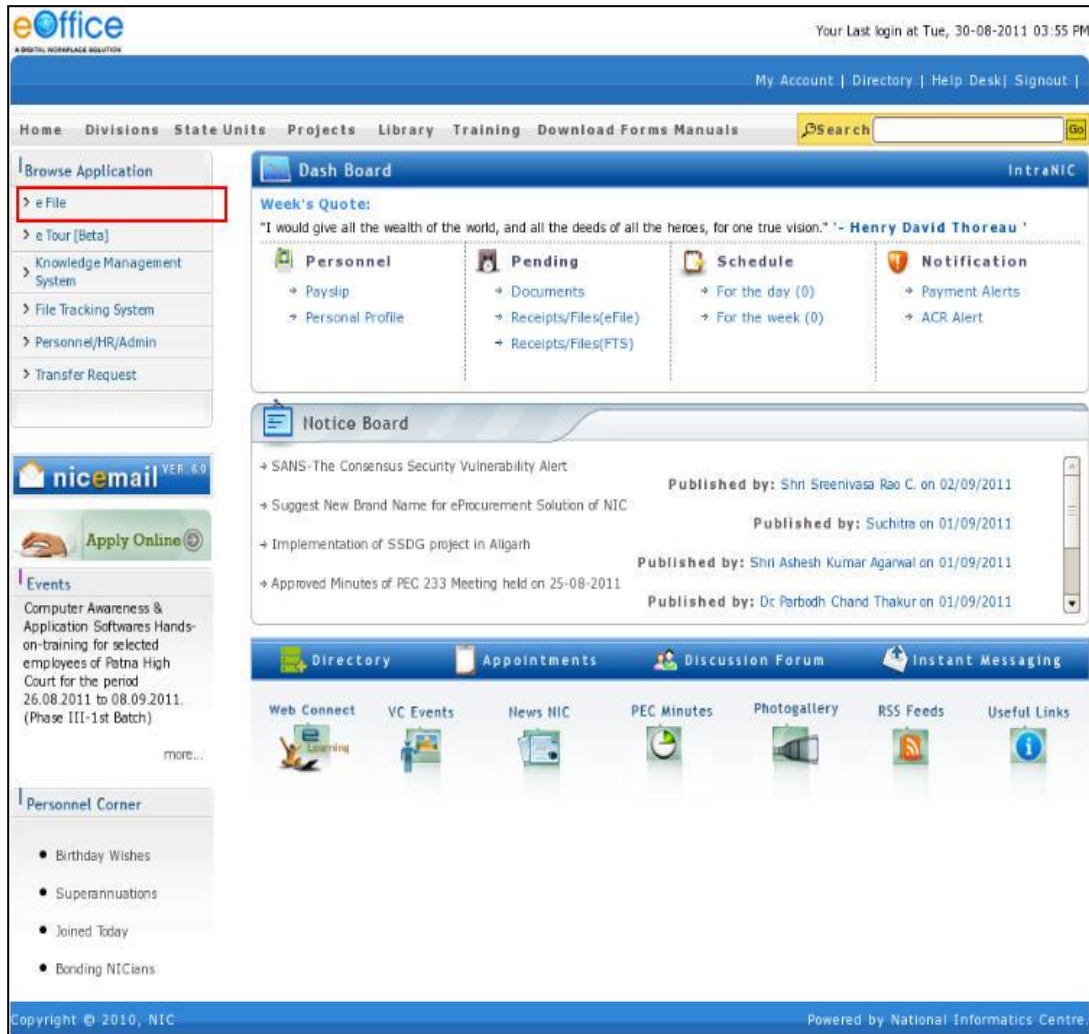


Fig.eFile.7

5. Click the **eFile** Link to move into eFile Application (Fig.eFile.7), as a result, eFile application opens as shown in Fig.eFile.8:

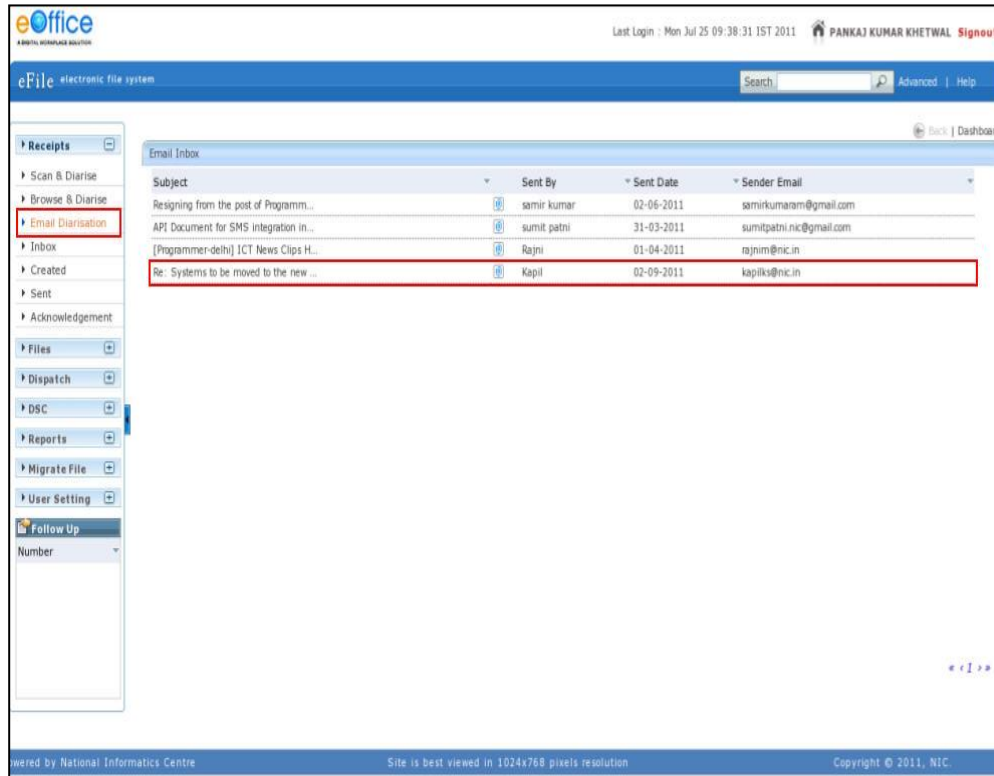


Fig.eFile.8

6. Click the **Email Diarisation** link and then click the moved receipt from the **NIC eMail** Section to diarise it (Fig.eFile.8).

As a result, **Diarisation** page appears, as shown in Fig.eFile.9:

The screenshot displays the eFile application interface. On the left is a navigation menu with options like Receipts, Scan & Diarise, Browse & Diarise, Email Diarisation, Inbox, Created, Sent, Acknowledgement, Files, Dispatch, DSC, Reports, Migrate File, User Setting, and Follow Up. The main area shows a scanned receipt document with the following text:

No. P-12023/773-4(A)
Government of India/Shri Ratan
Ministry of Law Affairs/Min. Mantralaya
Department of Personal & Administrative Reforms
(Karnik aur- Prashasanik Sudhar Vibh.)

Sardar Patel Bhawan, Sansad Marg,
New Delhi-110001, dated: 14.7.80

OFFICE ORDER

On transfer from the Ministry of Law, Justice & Company Affairs (Department of Company Affairs) Shri Ratan, a quasi-permanent statistical assistant, is appointed as Investigator in the Department of Personal & Administrative Reforms (Administrative Reforms Wing) in the scale of Rs. 495-15-500-Ri-15-950-20-700 with effect from the forenoon of 1.7.1980 on deputation basis. He will be on deputation for a period of 3 years terminable earlier at the discretion of this Department. Other terms and conditions of his appointment will be governed under the provisions of the Ministry of Finance (Department of Expenditure) O.M. No. 10(24)-R. III/60 dated 4.6.1981 as amended from time to time.

2. The pay of Shri Ratan as Investigator on deputation basis is fixed as under:-

Grade pay in the scale of Rs. 495-700 Rs. 515/-
Deputation (deput.) allowance 10% of grade pay.
Date of next increment 1.6.1981.

Under Secretary to the Govt. of India
Tele: 310695

DISTRIBUTION

1. Pay & Accounts Officer, D.P.A.N., New Delhi.
2. Cash Section with spare copy.
3. Department of Company Affairs with reference to their O.M. No. PFA/250/CL/74, dated 14.7.80.
4. Shri Ratan, Investigator.
5. Personal file of the individual.
6. Mail Cell.
7. Librarian.
8. Office order file.

On the right, the 'Create Receipt' form is visible, with the 'Generate Receipt' button highlighted. The form includes fields for Delivery Mode (Email), Language (English), Type (Letter), Letter Date (02/09/2011), Received Date (02/09/2011), and Diary Date (02/09/2011). The Sender Details section contains fields for Name (KAPIL KUMAR SHARM), e-Mail (kapilks@nic.in), Address 1 (D-122 PNH), Address 2 (Lodhi Road), Country (INDIA), Pincode (110003), State (DELHI), Mobile (9818026015), Ministry (Choose One), and Telephone (24305676). The Subject Matter section has a Subject field containing 'Re: Systems to be moved to the new location/S/W stack'.

Fig.eFile.9

7. Diarise moved Receipt and click the **Generate Receipt** () button (Fig.eFile.9).

Created

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

1. User can view all the created receipts, by clicking on '**Created**' link under the Receipts section. As a result the, **Create Receipts** screen appears, as shown in Fig.eFile.10:

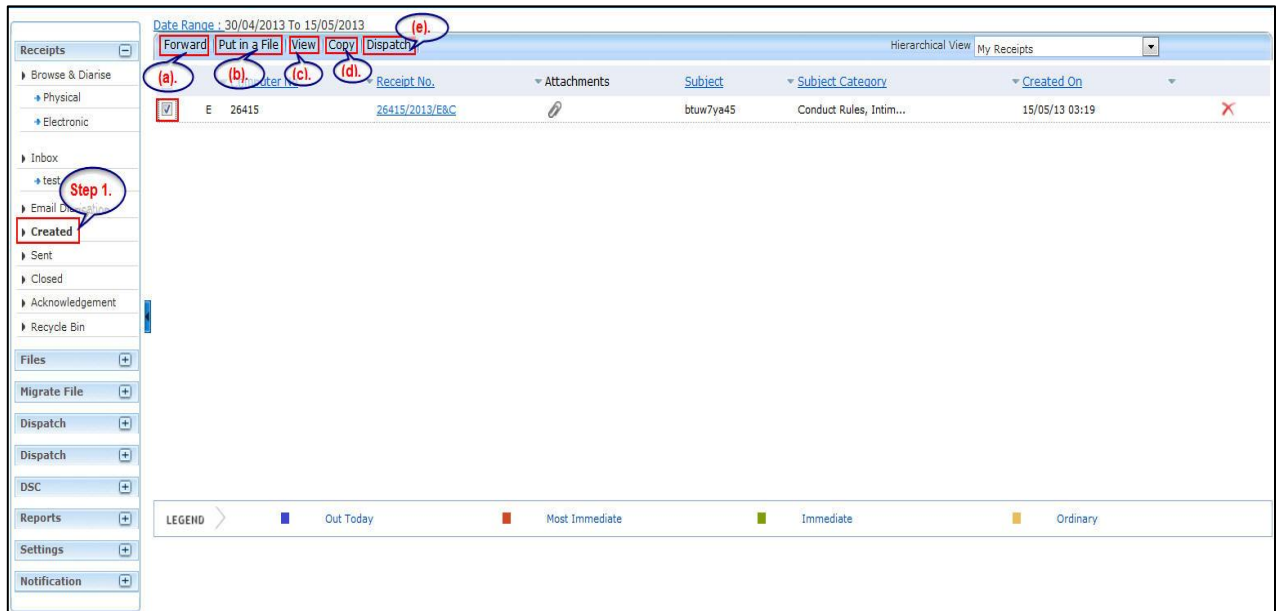


Fig.eFile.10

There are **5** links provided under **Created** Section of receipt:

- Forward:** User can use this option to **forward** the receipt to the intended recipient.
- Put in a File:** User can use this option to attach the generated receipt under the concerned file.
- View:** User can use this option to list the receipts depending upon its current state. i.e. (Physical, Electronic, All).
 - **Physical**-Click the **Physical** from the dropdown menu to view the Physical nature receipts.
 - **Electronic**-Click the **Electronic** from the dropdown menu to view the Electronic nature receipts.
 - **ALL**-Click the **ALL** from the dropdown menu to view the all the receipts altogether.
- Copy:** User can use this option to copy the metadata fields automatically and send it to other eOffice user. User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' button a new Receipt no. will be allocated to the copied receipt.
- Dispatch:** User can use this option to **Dispatch** a receipt.

If user wants to dispatch a receipt from the Created section then the receipt will first move to inbox of that user and

then from there it can be dispatched.

There are 10 links provided when opening up a Created receipt: (Physical and Electronic)

- a) **Send to Draft:** User can use this option if wants to work on the created receipt later on.
- b) **Movements:** User can use this option to track the Movements' of the receipt which automatically gets updated as Receipt moves further.
- c) **Details:** User can use this option to view the details of the generated receipts such as Dispatch History, Referenced files and Referenced Receipts.
- d) **Edit:** User can use this option to edit the Metadata fields of the Receipt by Clicking the **Edit** link () , as a result the Metadata fields get active.

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

After making required changes in Metadata fields, click the **Save** button to save Metadata.

- e) **Forward:** User can use this option to forward the created receipt to the intended recipient.
- f) **Put in a File:** User can use this option to attach the created receipt under the concerned file.
- g) **Copy:** User can use this option to copy the metadata fields automatically and send it to other eOffice user. User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' button a new Receipt no. will be allocated to the copied receipt.
- h) **Dispatch:** User can use this option to **Dispatch** a receipt.
- i) **Attach File:** User can use this option to attach the receipt with the File.
- j) **Attach Receipt:** User can use this option to attach the working receipt/document with the other receipt(s)/Document(s) irrespective of the receipt nature. This link is visible when user opens the receipt from Receipt Inbox/Created.

Physical Receipt/Document can be attached with in an Electronic Receipt and Vice-Versa.

Also, the receipt attached with other receipts can be send to only one user at a time.

For process of Attaching Receipts refer to “*Attach Receipts option under Receipt Inbox*”.

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

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

Sent

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

1. User can view all the sent receipts, by clicking the **Sent** link under the Receipts section. As a result the, **Sent Receipts** screen appears as shown in Fig.eFile.11:

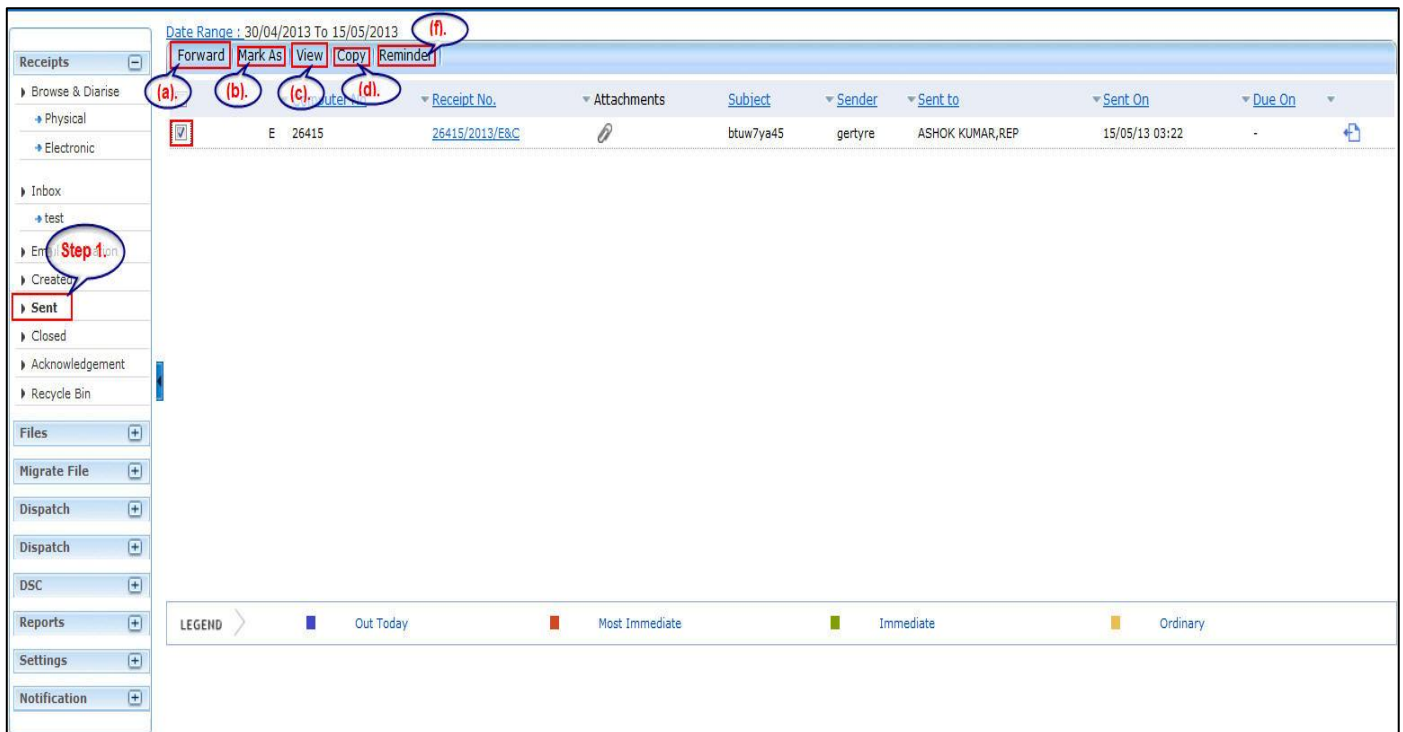


Fig.eFile.11

There are 5 links provided under **Sent** Section of receipt:

- Forward:** User can use this option to **forward** the receipt to the intended recipient.
- Mark As:** User can use this option to create a **New Follow Up** which keeps a track of a receipt, by alert mode, follow up action and specifying time to receive follow up on any corresponding receipt.
- View:** User can use this option to list the Files depending upon its current state. i.e. (Physical, Electronic, Followed Up, All)
 - **Physical-** Click the **Physical** from the dropdown menu to view **Physical Receipts**.
 - **Electronic-**Click the **Electronic** from the dropdown menu to view **Read Receipts**.
 - **Followed Up-**Click the **Followed Up** from the dropdown menu to view the Receipts on which the user has marked a follow up.
 - **ALL-**Click the **ALL** from the dropdown menu to view all the Receipts altogether.
- Copy:** User can use this option to **copy** the metadata fields automatically and send it to other eOffice user. User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' button a new Receipt number will be allocated to the copied receipt.

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

There are **3** links provided when opening up a Sent receipt: **(Physical-without attachment)**

- **Movement:** User can use this option to track the **Movements** of the receipt which automatically gets updated as Receipt moves further.
- **Details:** User can use this option to view the details of the sent receipt such as **Dispatch History, Referenced files, Referenced Receipts, Detach Receipts** and **Detach Files.:**
- **Copy:** User can use this option to **copy** the metadata fields automatically and send it to other eOffice user. User can edit the metadata fields as per requirement and after clicking the '**Generate Receipt**' button a new Receipt number will be allocated to the copied receipt.

Closed

Closed option contains a list of all the receipts that are marked as closed as shown in Fig.eFile.12:

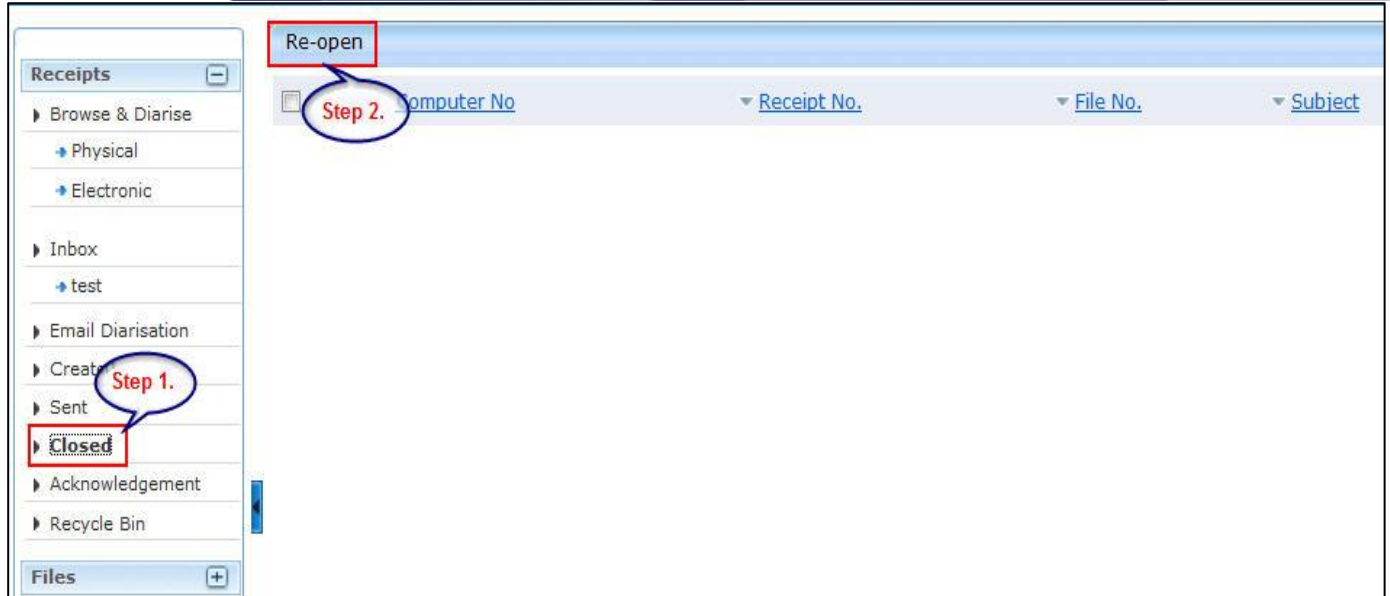


Fig.eFile.12

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

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

1. Select the Closed receipt which needs to be Re-Open and click the Re-open option available, as shown in Fig.eFile.12:

As a result, confirm message to re-open the receipt will appear.

Acknowledgement

Acknowledgement option contains all the receipts that are diarized by the user for which an acknowledgement

can be generated.

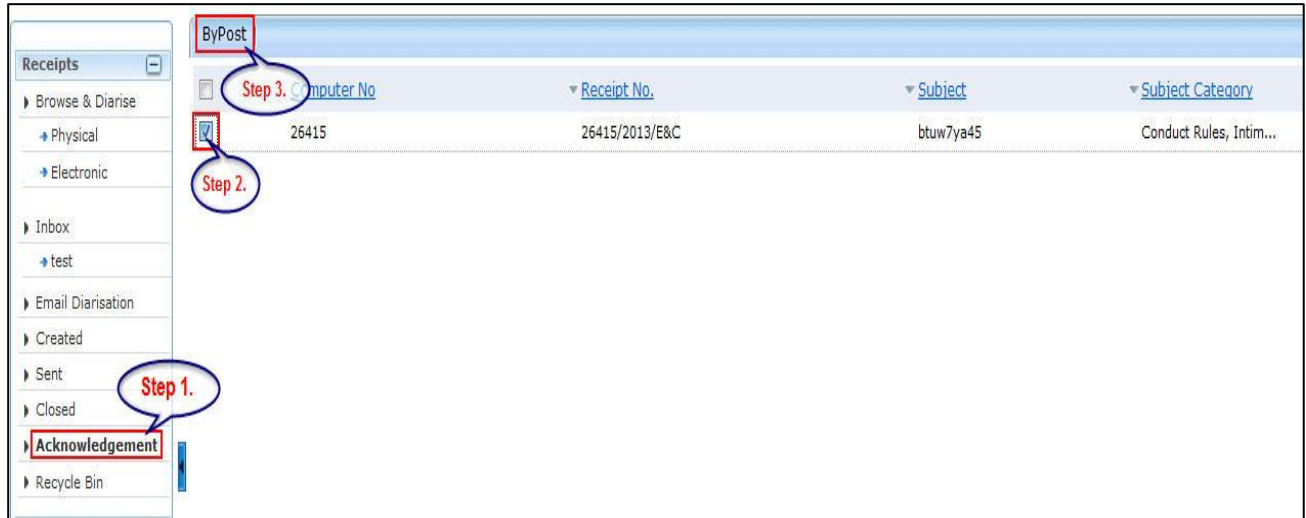


Fig.eFile.13

ByPost: This link helps the user to generate an acknowledgment for the selected receipt

1. User can send the acknowledgement, by clicking the **Acknowledgement** link under the Receipts section.
2. Select the receipt for which the acknowledgement is to be generated.
3. Click the **ByPost** ([ByPost](#)) link.

Recycle Bin

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

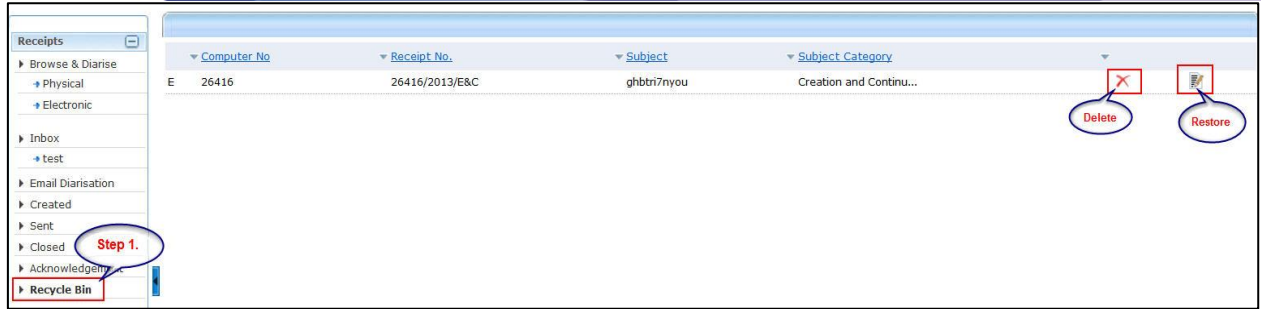


Fig.eFile.14

1. User can check the deleted receipts, by clicking the **Recycle Bin** link under the Receipts section.

There are 2 links provided under **Recycle Bin** Section of receipt:

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

Files

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

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

- Inbox
- Created
- Parked
- Closed
- Sent
- Physical File
- Electronic File
- 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, as shown in Fig.eFile.15:

Date Range : 03/09/2012 To 18/09/2012

Receive | Reply | Forward | View | Move To | Mark As | More Action | Create Volume | Hierarchical View | My Files

	Number	Subject	Sender	Sent on	Due On	Read On	Quick Action
<input type="checkbox"/>	E A-11011/272/2012-CC	sadasd	JAGMOHAN SINGH	03/09/12 04:16	-	04/09/12 09:02	
<input type="checkbox"/>	E A-11011/273/2012-CC	dafdsf	JAGMOHAN SINGH	03/09/12 04:10	-	14/09/12 11:38	
<input type="checkbox"/>	E A-11011/274/2012-CC	dgsdfg	ALOK PANDEY	03/09/12 04:10	-	14/09/12 11:31	
<input type="checkbox"/>	P B/255/2012-LF	Gs Sharma Created	GEETA SHARMA	03/09/12 03:45	-	03/09/12 03:45	
<input type="checkbox"/>	E B/258/2012-LF	asd	GEETA SHARMA	03/09/12 03:45	-	-	
<input type="checkbox"/>	E A-14011/3/2012-LF	wrdwerwrwr	GEETA SHARMA	03/09/12 03:45	-	-	


LEGEND ■ Out Today ■ Most Immediate ■ Immediate ■ Ordinary

Fig.eFile.15

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

There are 8 links provided under Inbox Section of Files:

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

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

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




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

- **Unread**- Click the **Unread** from the dropdown menu to view **unread Files**.
 - **Read**-Click the **Read** from the dropdown menu to view **read Files**.
 - **Followed Up**-Click the **Followed Up** from the dropdown menu to view the Files on which the user has marked a follow up.
 - **Physical**-Click the **Physical** from the dropdown menu to view the **Physical Files**.
 - **Electronic**-Click the **Electronic** from the dropdown menu to view the **Electronic Files**.
 - **ALL**-Click the **ALL** from the dropdown menu to view the All receipts altogether.
- e) **Move To:** Helps the user to create New Folders and manage Existing Folders.
- **My Folders**- Click the **My Folders** link from the dropdown menu to view the File inbox and its subfolders.
 - **Manage Folders**- Click the **Manage Folders** link from the dropdown menu to **Delete** or **Edit** 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.
- f) **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.
- g) **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.

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

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

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

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.

1. User can view all the created Files, by clicking on '**Created**' link under the Files section.

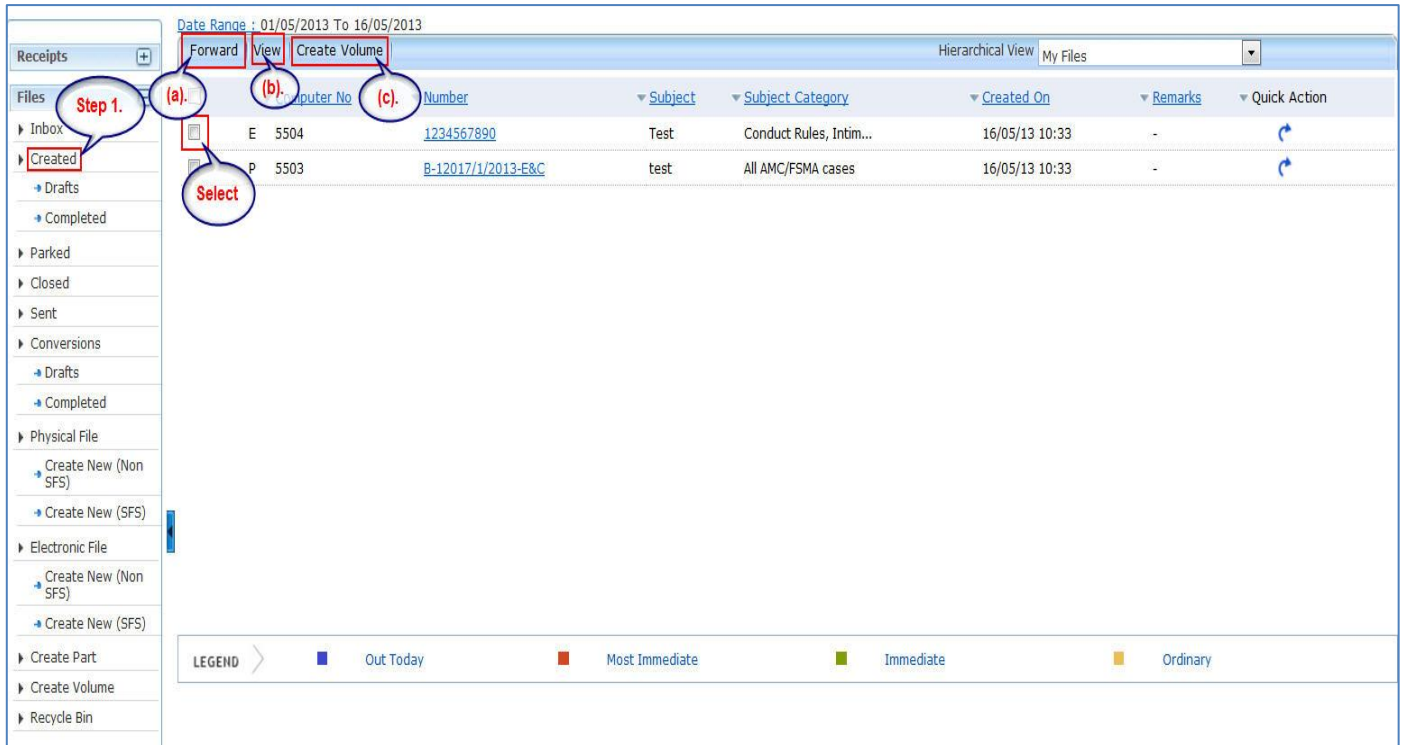


Fig.eFile.17

Created Link Contains 2 options:


- **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 forward a particular File/s to the recipient.


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

b) View: Helps the user to list the Files depending upon its current state. i.e. (Physical, Electronic, All)

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

c) Create Volume: Helps the user to create a new Volume of an existing file.

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

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

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.

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

1. User can view all the parked Files, by clicking on '**Parked**' link under the Files section.

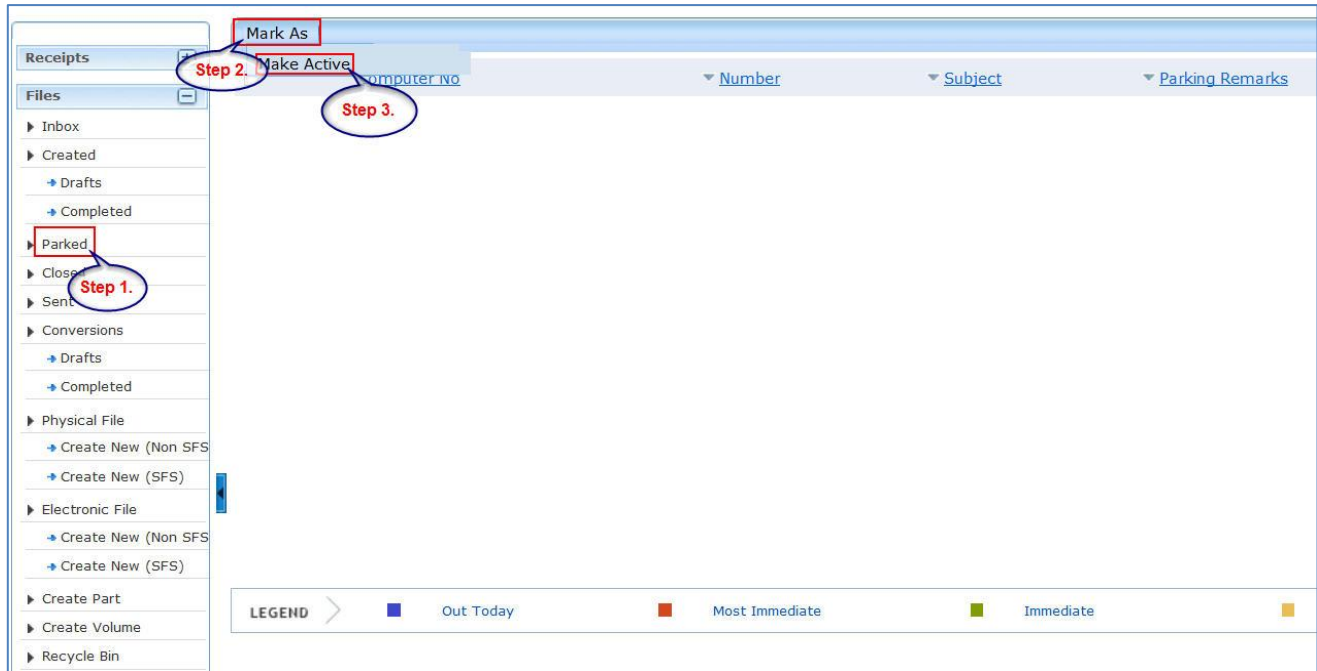


Fig.eFile.18

2. Select the File/s from the **Parked** link of Files which needs to be Parked.
3. Scroll mouse over '**Mark As**' Link and click the **Make Active** option under it.

As a result, the Files become active and move to the File Inbox.

Closed

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

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

1. Select the File/s from the **Closed** link of Files which needs to be Closed.

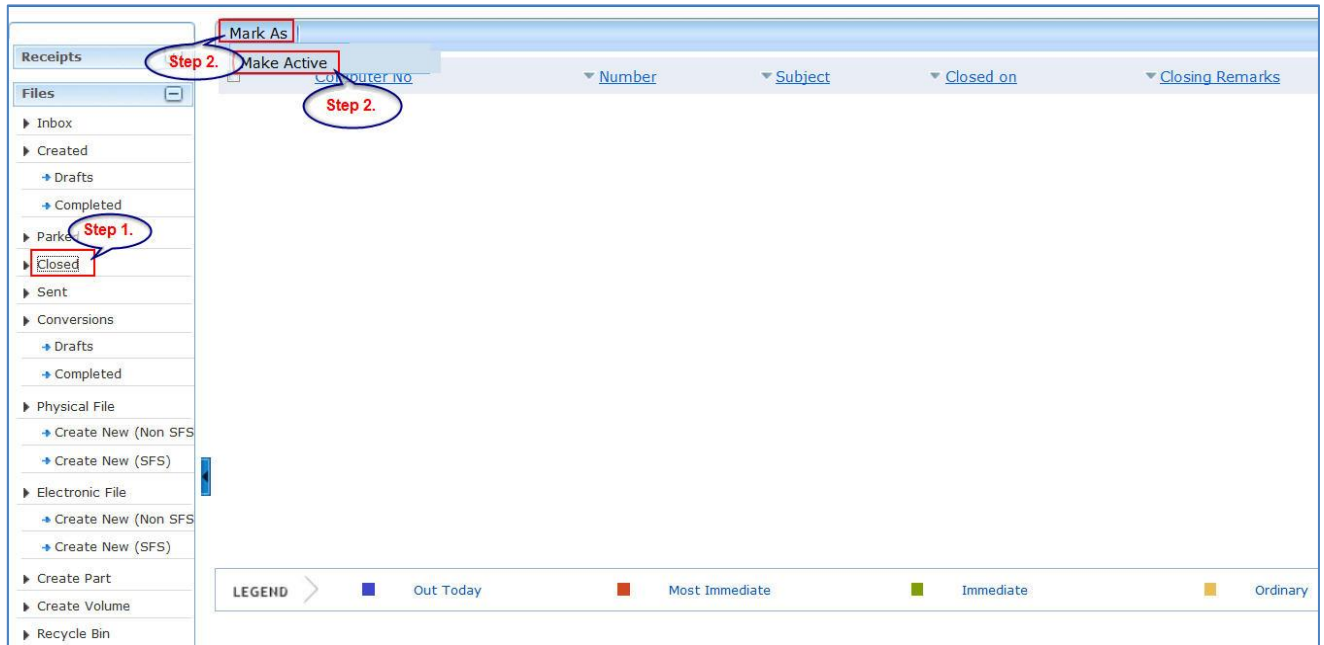


Fig.eFile.19

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

2. Scroll mouse over **Mark As** Link and click the **Make Active** option under it.

As a result, the Files become active and move to the File Inbox.

Sent

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

1. User can view all the sent Files, by clicking the **Sent** link under the Files section. As a result the, **Sent Files** screen appears. as shown in Fig.eFile.20:

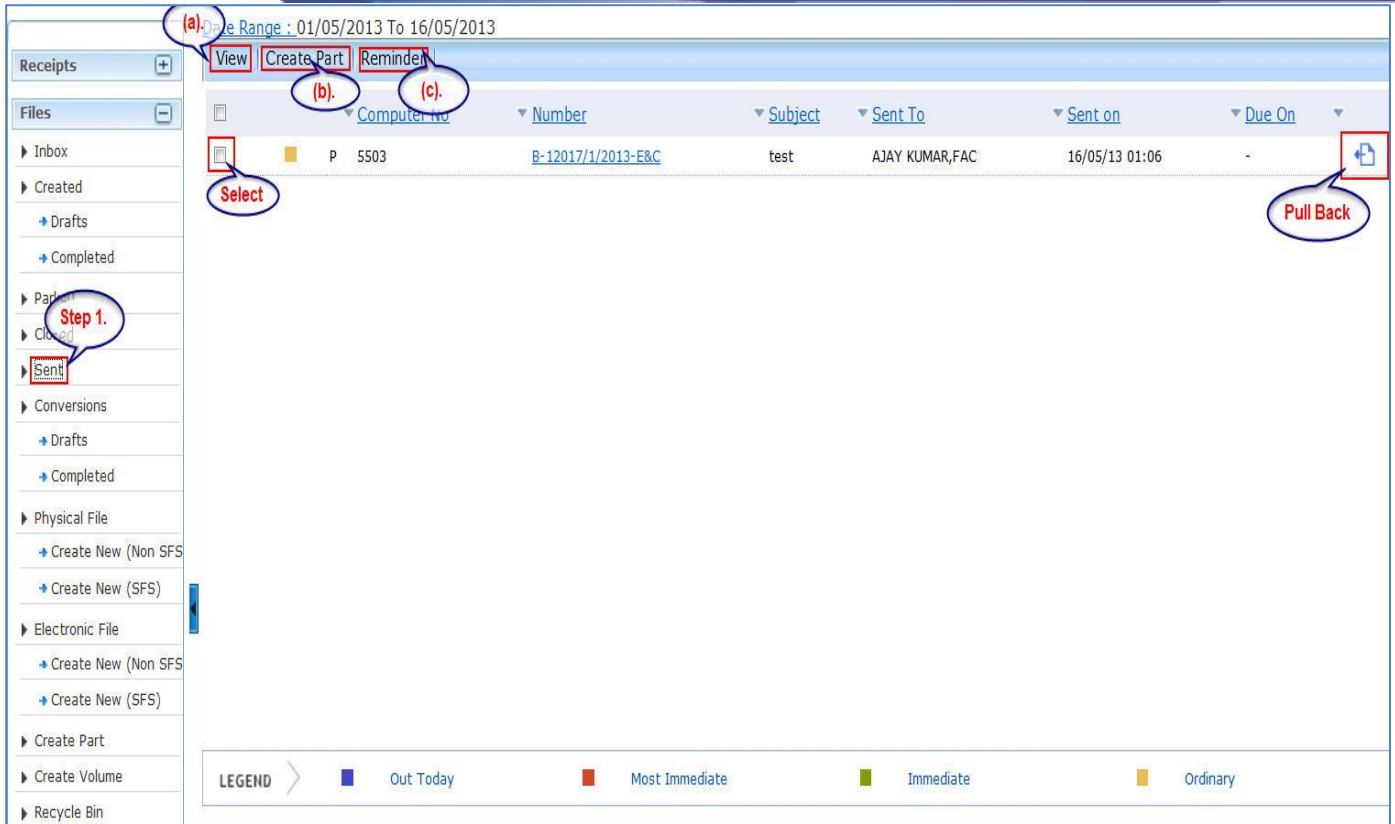



Fig.eFile.20

There are 3 links provided under Sent Section of File:

- a) **View:** Helps the user to list the Files depending upon its current state (Physical, Electronic, Follow Up, All).
 - **Followed Up-**Click the **Followed Up** from the dropdown menu to view the Files on which the user has marked a follow up.

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

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

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

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

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

Physical File

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

- **Create New (SFS):** This option creates a physical file with SFS standard i.e. the user can enter File No. without any restriction or standards.

- **Create New (Non-SFS):** This option creates an Electronic file with Non-SFS standard i.e. the user has to select the available heads for the nomenclature of File.


To create a new Physical File in Non-SFS mode, user has to perform the following:

1. Open **Create New (Non-SFS)** by clicking on the option under **Physical File** under the left navigation, as a result, File Cover Page screen appears, add the File No.

The screenshot shows a web form for creating a new physical file. At the top, it says 'भारत सरकार GOVERNMENT OF INDIA' and 'NIC E&C'. The form has several sections:

- File No.:** A row of five 'Choose' dropdown menus, followed by a year field (2013) and an 'E&C' dropdown. A callout box labeled 'Step 1.' points to this row.
- Subject:** A text input field. A callout box labeled 'Step 2.' points to this field.
- Description:** A large text area for entering the file's description.
- Category:** Two dropdown menus labeled 'Main' and 'Sub', both set to 'Choose one/one'.
- Other Details:** A section containing:
 - Classified:** A dropdown menu set to 'Choose One'.
 - Remarks:** A text area for additional notes.
 - Previous Reference:** A text input field.
 - Later Reference:** A text input field.
- Buttons:** At the bottom, there are two buttons: 'Work On File Later' and 'Continue Working'. A callout box labeled 'Step 3.' points to the 'Continue Working' button.

Fig.eFile.21

2. Enter the necessary details on the File Cover Page. **Subject Description** is a Mandatory field along with File no.
3. After filling the necessary details, click the **Continue Working** () button to create a new physical file. As a result file gets created.

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

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

- a) Correspondence:** With the help of this feature user can attach physical correspondence/Receipt to the working File.
- b) Link:** With the help of this feature user can Link and delink other eFile(s) to the working file.

It contains 2 sub links:

- **Internal Files:** This sub link helps the user to link/delink any other file from within the Organisation
 - **Linked In Files:** This sub link helps the user to view other Files that are linked from some other Organisation with the working file.
- c) **Movements:** With the help of this feature user can see the movement of a File i.e. the details of all the users who has worked on it.
- d) **Details:** With the help of this feature user can see the details of a File i.e. total no. of part Files created, TOC receipt, Dispatch Movement History and Linked Files.
- e) **Edit:** With the help of this feature user can make changes to the cover page of existing running file except the Basic and corresponding Heads.
- f) **Send:** With the help of this feature user can send the File to the Recipient.
- g) **Dispatch:** With the help of this feature user can Dispatch the receipt to the Recipient of different Ministries or Office.
- h) **More Action:** With the help of this feature user can Park or Close the working file.

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

- i) **Create Volume:** With the Help of this feature, user can create a new Volume of an existing file.
- j) **Convert File:** Helps the user to convert the Physical File to Electronic File only irrespective of the File location, weather it is attached with a receipt or from the File inbox/Created Section.

Electronic File

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

- **Create New (Non-SFS):** This option creates an Electronic file with Non-SFS standard i.e. the user has to select the available heads for the nomenclature of File.

- **Create New (SFS):** This option creates an Electronic file with SFS standard i.e. the user can enter File No. without any restriction or standards.

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

1. Open **Create New (Non-SFS)** by clicking on the option from the Left navigation panel under the **Electronic File** section, as a result, File Cover Page screen appears. Add **File No.**

भारत सरकार
GOVERNMENT OF INDIA

NIC
E&C

File No. ^{*} Choose Choose Choose Choose 2013 E&C

Subject

Description ^{*}

Category Main Choose one
Sub Choose One

Other Details

Classified Choose One

Remarks

Previous Reference Later Reference

Work On File Later > Continue Working >

Step 1.

Step 2.


Step 3.

Fig.eFile.22

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

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

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

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

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

a) **Add note:** With the help of this feature user can add a **green note** or a **yellow note** onto the newly created file or existing File.

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

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

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

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

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

It contains 2 sub links:

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

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

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

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

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

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

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

k) **Create Volume:** This option helps the user to create a new Volume of an existing file.

Create Part

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

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

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

भारत सरकार
GOVERNMENT OF INDIA
NIC
E&C

Step 1.

File Number

Step 2.

Subject

Description*

Main

Sub

Other Details

Classified

Remarks

Previous Reference

Later Reference

Step 3.

Fig.eFile.23

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

Create Volume

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

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

1. Open **Create Volume** by clicking on the option from the Left navigation panel under the File Section. Add File Number or upload the file, a part which is to be created.

भारत सरकार
GOVERNMENT OF INDIA
NIC
E&C

Step 1.

File Number

Step 2.

Subject

Description*

Main

Sub

Step 3.

Other Details

Classified

Remarks

Previous Reference

Later Reference



Fig.eFile.24

2. Enter the necessary details on the File Cover Page. Subject Description **is a Mandatory field along with File No.**
3. Click on the **Create Volume** () Link (Fig.eFile.318) to create a Volume, as a result the new Volume of a file gets created.

Recycle Bin

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

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

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

Migrate File

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

Migrate File Link contains 3 sub links:

- Create New
- Created
- Folder Options

Let's learn about these links one by one:

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

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


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

The screenshot shows the 'Migrate File' application interface for the Government of India. The header includes the text 'भारत सरकार' and 'GOVERNMENT OF INDIA'. Below this, there are fields for 'NIC' and 'E&C'. The main form area is divided into several sections:

- Step 1:** A red box highlights the 'File No.*' field, which contains four 'Choose' dropdown menus, a year field set to '2013', and a dropdown menu set to 'E&C'. Below this is a 'Physical File No.*' field with a 'Browse' button.
- Subject:** A section with a 'Subject' label and a 'Description *' text area.
- Step 2:** A red box highlights the 'Category *' section, which includes 'Main' and 'Sub' dropdown menus, both set to 'Choose One'.
- Other Details:** A section with a 'Classified' checkbox, a 'Choose One' dropdown, and an 'Opening date *' field with a calendar icon. Below this is a 'Remarks' text area.
- Step 3:** A red box highlights the 'Opening date *' field.
- Step 4:** A red box highlights the 'Continue Working >' button at the bottom right.

At the bottom of the form, there are two buttons: 'Work On File Later >' and 'Continue Working >'.

Fig.eFile.25

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

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

Create option contains 2 sub modules:

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

There are 5 links under Completed tab to perform operations:

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

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

To provide permission to a user, perform the following:

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

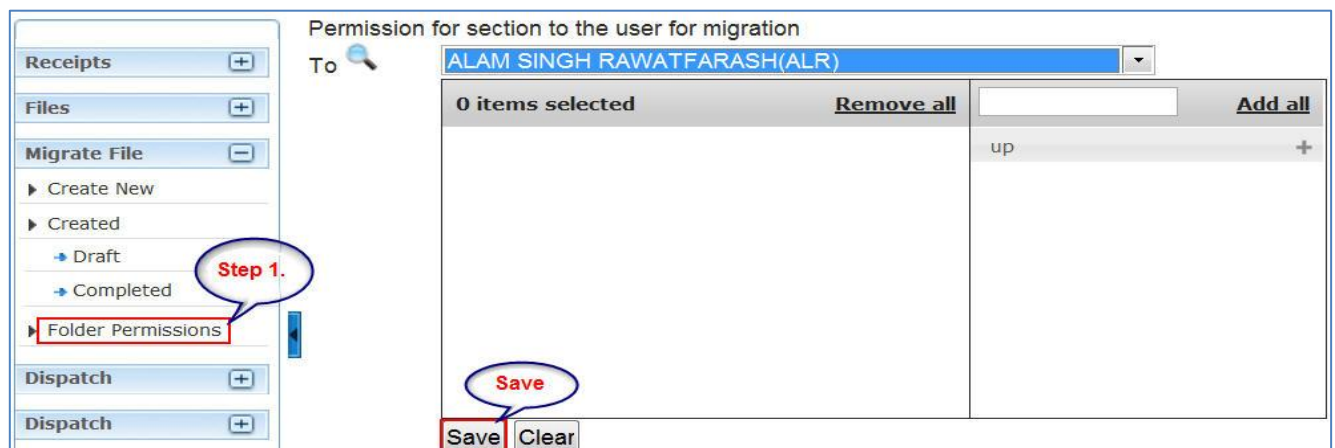



Fig.eFile.26

2. Search the user to provide folder permission and click the **Save** () button, as shown in the figure Fig.eFile.27:

Permission for section to the user for migration

To

3 items selected		Remove all		Add all
↓ up6		—	up1	+
↓ up7		—	up3	+
↓ up		—	up2	+

Fig.eFile.27

Dispatch

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

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

- Sent
- Returned

Let's have an introduction about these Links:

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

If the status of the Issue or sent draft is:

Issued and Sent: Refers to when the DFA has been sent by the CRU section but not dispatched finally by the CRU section

Issued and Dispatched: Refers to when the DFA that has been sent to CRU section has been finally dispatched.

Issued and Returned: Refers to when the sent DFA has been returned back to the CRU section.

Final Dispatch can be done only after receiving the Draft/Letter.

There is 1 link provided under Sent module of Dispatch:


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

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

There are 2 links provided under Returned section of Dispatch:

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

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

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

DSC (Digital Signature Certificate)

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

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

- 1) DSC Registration

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 initialize the DSC certificate or e-token.

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

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

Token involves only a single pen drive device.

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

For e-Token Enrollment, perform the following:

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** and **Password**.
5. Click the **Login** button. As a result, the user gets successfully log into the eOffice application.
6. Plug-In the e-token in your machine/system.
7. Click the **DSC Registration** link under the DSC section. As a result, the DSC Enrollment Screen appears.
8. Click the Signing **Certificate** link in the DSC Enrollment Screen (Fig.eFile.345) As a result, the DSC Enrollment screen appears.
9. Select the certificate for enrollment and click the **OK** button.

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** and **Password**.
6. Click the Login button. As a result, the Log On dialog box appears, prompting for password above the DSC Authentication screen.

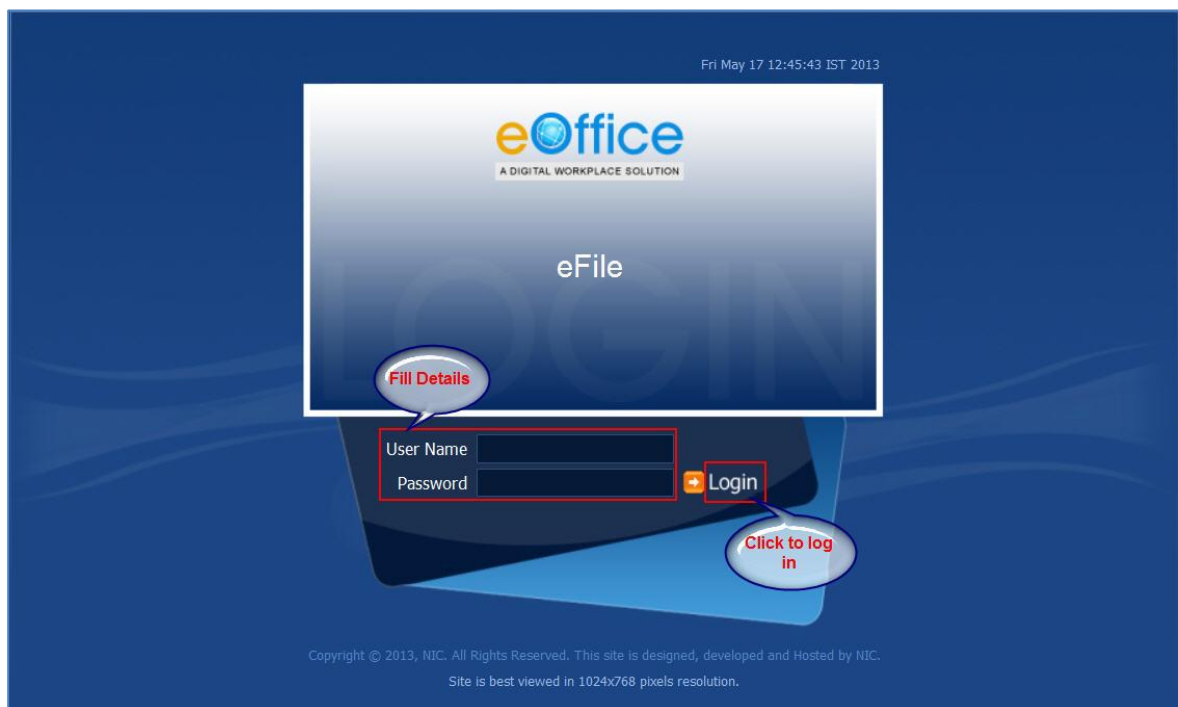


Fig.eFile.28

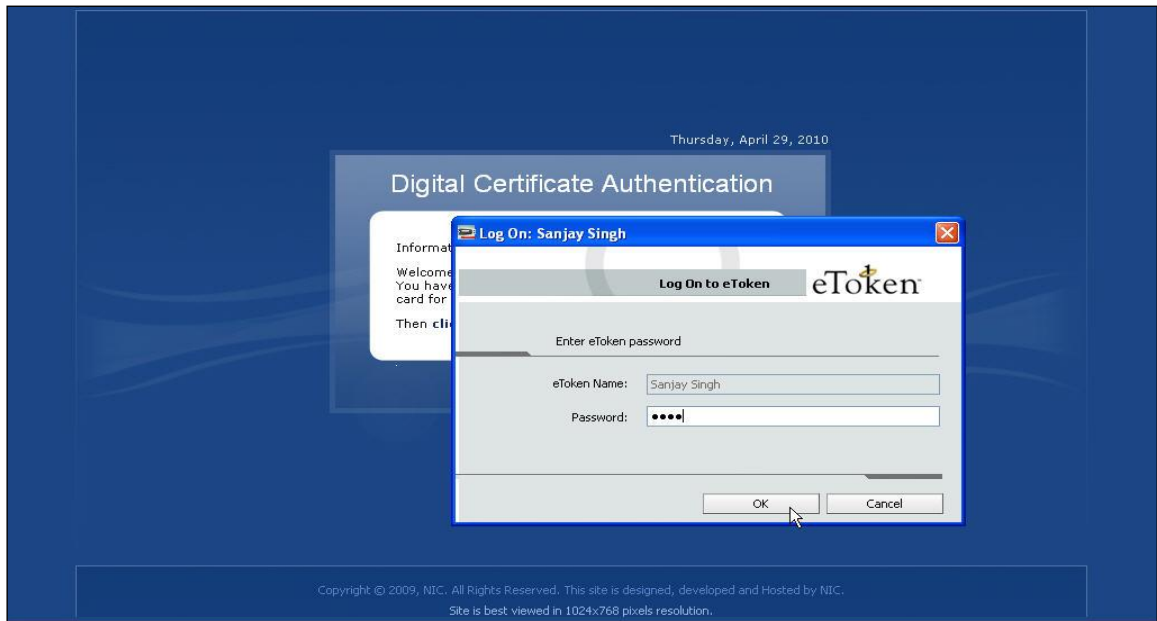


Fig.eFile.29

7. Type the **password** in the Password field in the Log On screen.

User can enter the wrong password only 10 times. Thereafter if the wrong password is entered, the user gets blocked.

8. Click the **OK** button. As a result, the user gets logged into the eOffice application.

For DSC Card Enrollment, perform the following:

1. Type the URL of the eOffice application in the address bar of the web browser.
2. Press Enter from the keyboard.
3. A window appears, displaying the login page for eOffice.
4. Type the **User id** in the User Name text box.
5. Type the **password** in the Password text box.
6. Click the **Login** button.
7. **Plug-In the e-token in your machine/system**, as a result, the user gets successfully log into the eOffice application.
8. Click the **DSC Registration** link under the DSC section. As a result, the DSC Enrollment Screen appears.
9. Click the **Signing Certificate** link in the **DSC Enrollment Screen**. As a result, **Enter Pin** dialog box appears.
10. Enter the pin in the **Enter Pin** text box in the Enter PIN dialog box.
11. Click the **OK** button (Fig.eFile.358), as a result, the **DSC Enrollment** screen appears.
12. Select the certificate for enrollment and click the **OK** button.
13. Click the OK button to complete the process of DSC enrollment.

For DSC Card Authentication, perform the following:

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

Reports

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

It contains following 21 types of reports:

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

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

- **Departmental Summary:** Displays a summary of all the files/ receipts managed by a particular department.
- **Dispatch (Section-wise):** Displays a list of files that have been dispatched by various sections.
- **Revenue Report:** Displays a list of the expenditure on all the dispatch processes.
- **Receipts Forwarded by Section:** Displays a list of the forwarded receipts by particular section.
- **Pendency Report (File/ Receipt):** Displays a list of all the Pending Receipts or Files.
- **Month-wise Files Created:** Displays a list of files created in the particular month.
- **Month-wise Files Received:** Displays a list of files received in the particular month.
- **Month-wise Files Forwarded:** Displays a list of files forwarded in the particular month.
- **Month-wise Receipts Created:** Displays a list of receipts created in the particular month.
- **Month-wise Receipts Received:** Displays a list of receipts received in the particular month.
- **Month-wise Receipts Forwarded:** Displays a list of receipts forwarded in the particular month.

Settings

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

The Setting section incorporates 5 modules:

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

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

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

i. **General Settings** : It helps the user to modify the General Settings like:

- **Max # of records/page:** Refers to numbers of records that listed in a page
- **Auto Save Duration:** Refers to set mode into Auto save while making any note in eFile Application.
- **Flash Animations:** Refers to if users prefers Flash animation in eFile application or not.

ii. **Alert Settings:** It helps the user to set alerts on Mobile, Email or both.

iii. **List View Settings:** It helps the user to change the default view mode of Files/Receipts. User can set it to Electronic view, physical view or Default view which comprises of both.

iv. **DSC Settings:** It helps the user to view the current status of DSC installed to his/her account (if any).

v. **Customise your settings:** It helps the user to customize the DSC setting as per requirement. User can set it to Authentication mode, signing mode or both which comprises of Authentication and signing of DSC.

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

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

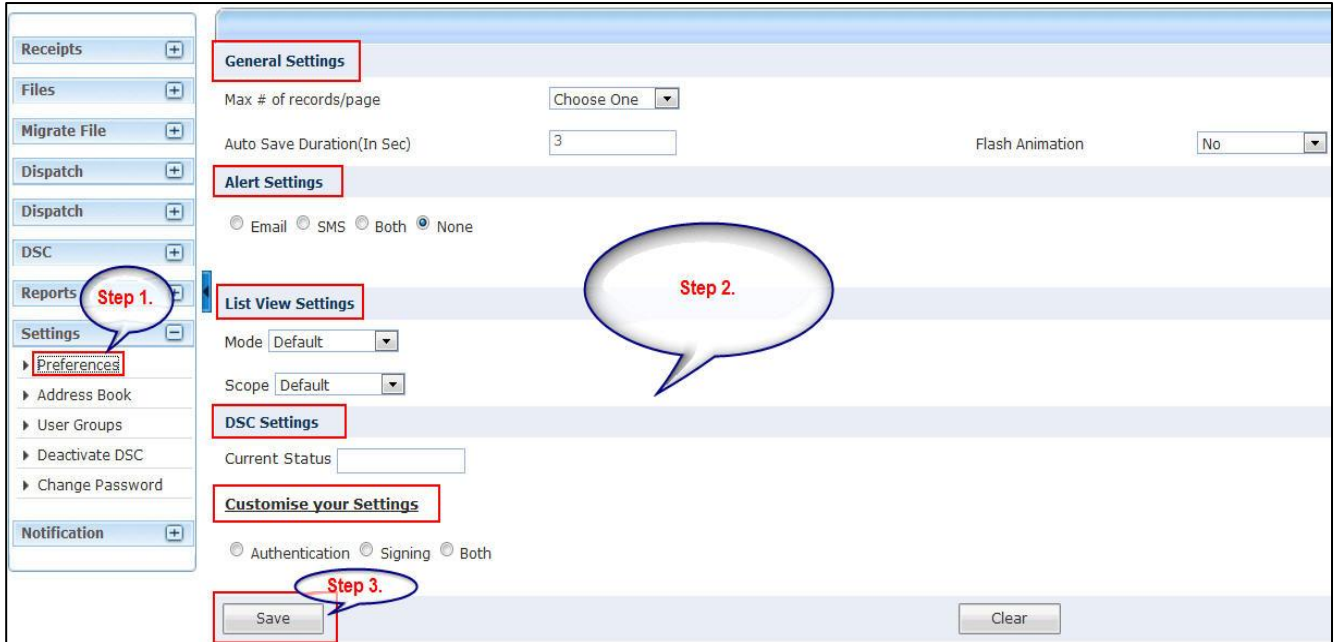


Fig.eFile.30

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

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

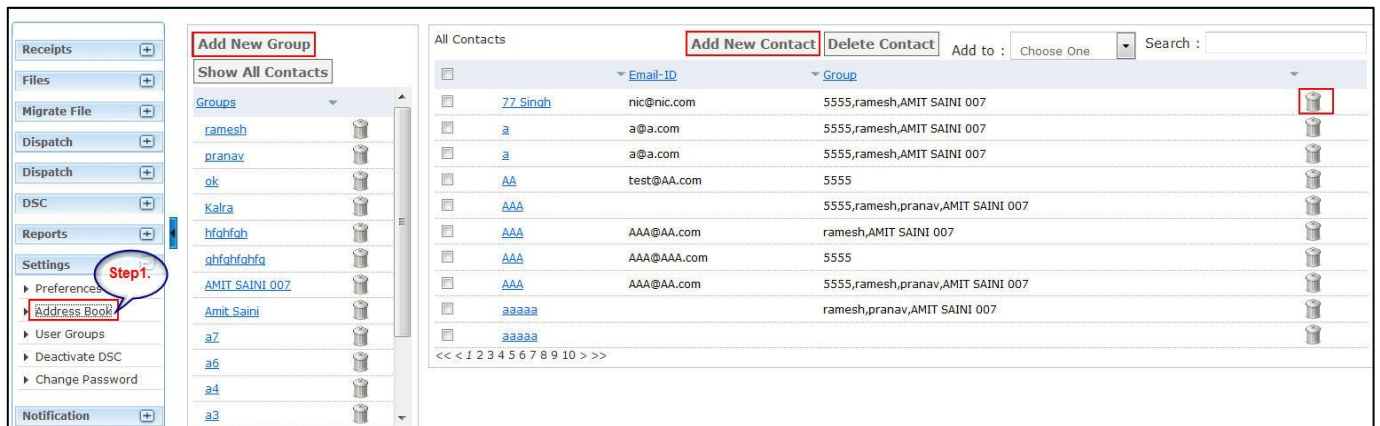


Fig.eFile.31

User Groups: This module facilitates the user to create a group and add user list to that created group which helps the user while sending a Receipt/File to list of selected users or to a group which comprises of contained user list.

To create User Group and add users to the group, user has to perform the following steps:

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

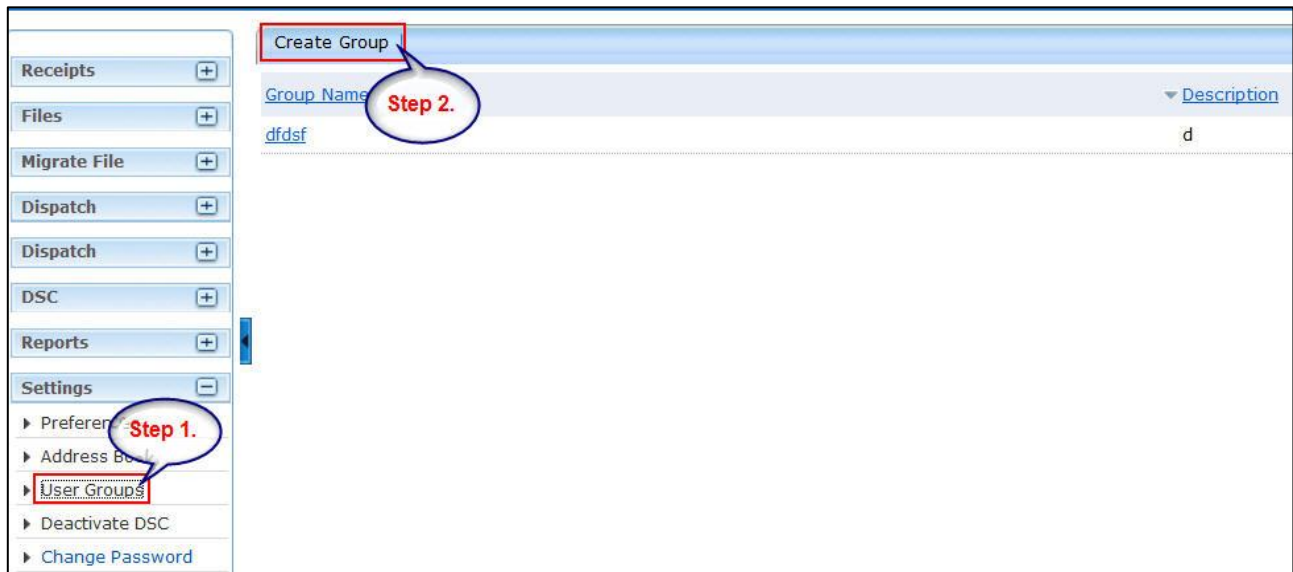


Fig.eFile.31

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

Now to add users to the created group:

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

As a result, the user gets added up in the selected group.

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

Change Password: User can change password using this link.

Now to change password user must follow these steps:

1. Open **Change Password** by clicking on the link under **Settings** section.
2. Enter the **Old Password**.
3. Enter the **New Password** which will replace the old password.
4. Enter the New password again for confirmation.
5. Click on **Update**.

The screenshot shows the 'Change Password' form in the eoffice application. The form is titled 'Change Password' and contains three input fields: 'Old Password*', 'New Password*', and 'Confirm Password*'. The 'New Password*' field has a note: '[6-14 characters (includes all alphanumeric and special character excluding space)]'. Below the fields is an 'Update' button. A sidebar on the left shows the 'Settings' menu with 'Change Password' highlighted. Red callouts indicate the steps: Step 1 points to 'Change Password' in the sidebar, Step 2 to the 'Old Password*' field, Step 3 to the 'New Password*' field, Step 4 to the 'Confirm Password*' field, and Step 5 to the 'Update' button.

Fig.eFile.32

Notification: This tab contains all the reminders/notifications that have been set by user for themselves or for other eOffice users.

This tab includes 2 modules:

- **Self Reminder:** It contains all the reminders/notification that has been set by the user for themselves or for other eOffice users.

Actions that user can perform under this module are:

- Notify:** This facilitates the user to notify the recipient regarding the reminder that has already been set. An alert will be sent to the recipient's **Reminder Received** module when applicant notifies the reminder.
 - Close:** This facilitates the user to close the reminder if target has been achieved or if no longer required.
 - Discard:** This facilitates the user to discard the reminder if it has been set by mistake.
- **Reminder Received:** It contains all the reminders/notification that has been set by other eOffice users. User can further mark the received reminder as '**Mark as Read**' or even can '**Delete**' the reminder.

Search

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

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

- Module search
- Advanced Search

Let's learn about these types one by one:

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

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

For module search process, perform the following:

1. Select the application module from which the user want to search, as shown in Fig.eFile.33:

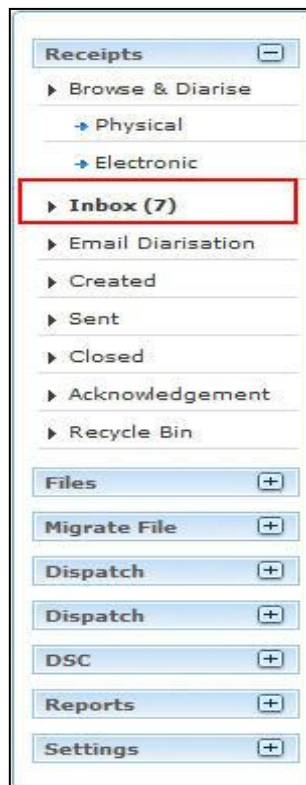


Fig.eFile.33

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

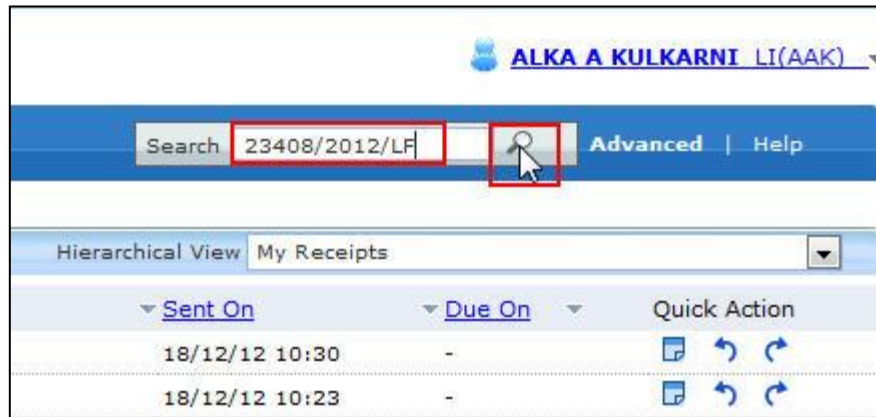


Fig.eFile.34

As a result, Search result appears.

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

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

Advance Search module is divided into 3 types of search:

- Hiearachy search:
- Section wise search:
- Global Search:

Let's Learn about these submodules one by one:

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

To search for File, user has to perform the following:

1. Select the **File module** under **Advanced** tab, as shown in Fig.eFile.35:

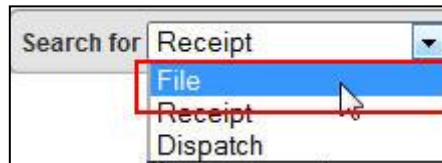


Fig.eFile.35

As a result, following page appears.

A screenshot of a search form. At the top, there is a label 'Search for' followed by a dropdown menu with 'File' selected. Below this, there are several input fields: 'Year' (text box with '2012'), 'File no.' (text box), 'Previous Reference' (text box), 'Computer No' (text box), 'Later Reference' (text box), 'Subject' (text box), 'Category' (dropdown menu with 'Choose one'), 'Sub Category' (dropdown menu with 'Choose one'), and 'Opening Date' (two date pickers with '17' selected). At the bottom left, there is a 'Search Files' button. At the bottom right, there is an upward-pointing arrow icon.

Fig.eFile.36

2. Type the **Year, File number, Computer No., Subject, Category** etc in the respective fields and click the **Search Files** () button.

As a result, Search result appears.

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

Follow the same procedure to search under Receipts or Dispatch.

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

Actions that can be performed on Search Results:

- **On Receipts:**

Receipts Inbox and Created:

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

Receipts Sent:

- a. View: Helps the user to view the content of the receipt.
- b. Details: Helps the user to view the metadata details and the movements of that receipt.

Receipts with other user:

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

Note: No action can be performed on Receipts which are attached with a File.

- **On Files:**

File Inbox and Created:

- b. View: Helps the user to view the content of the File.
- c. Details: Helps the user to view the metadata details and the movements of that File.
- d. Send: Helps the user to forward the File to other eOffice user.

File with other user:

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

File Closed:

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

Note: No action can be performed on Files which are attached with a Receipt.

- **On Issued Dispatch:**

Dispatch self:

- a. **View:** Helps the user to view the content of the issued dispatch.
- b. **Details:** Helps the user to view the metadata details of the issued dispatch.

Dispatch by other users:

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

Action Process (For Parked Files, Closed Files and Closed Receipts)

- **For Parked Files:**

To search Parked Files user has to perform the following

1. Select the **File module** under **Advanced** tab. As a result, following page appears.
2. Type the **Computer No., File No.** etc of the **Parked File** and click the **Search Files** () button.

Actions that can be performed by right clicking the result are:

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

- **For Closed Files:**

To search Closed File, user has to perform the following

1. Select the **File module** under **Advanced** tab.
2. Type the **Computer No., File No.** etc of the **Closed File** and click the **Search Files** () button.

Actions that can be performed by right clicking the result are:

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

- **For Closed Receipts:**

To search Closed Receipt, user has to perform the following:

1. Select the **Receipt module** under **Advanced** tab.
2. Type the **Receipt number, Computer No.** etc of the **Closed Receipt** in the respective fields and click the **Search Receipts** () button.

Actions that can be performed by right clicking the result are:

- a) **Reopen:** This action helps the user to reopen the closed receipt.

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