सत्यमेव जयते

eOffice

A DIGITAL WORK PLACE SOLUTION

eFile

# File Management System

## User Manual

NIC-EOF-EFILE-UM-002

Prepared by
National Informatics Centre

# Table of Contents

# Receipt

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

## Diarisation of DAK/Letter

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

- **Physical:** The unique number for the DAK/Letter is generated by the system, and further processing of the receipt can either be physical (manual) or electronic in nature.
- **Electronic:** The unique number for the DAK/Letter is generated by the system, and further processing of the receipt is always electronic in nature.

**Important Points:**

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

## STEPS TO FOLLOW:

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

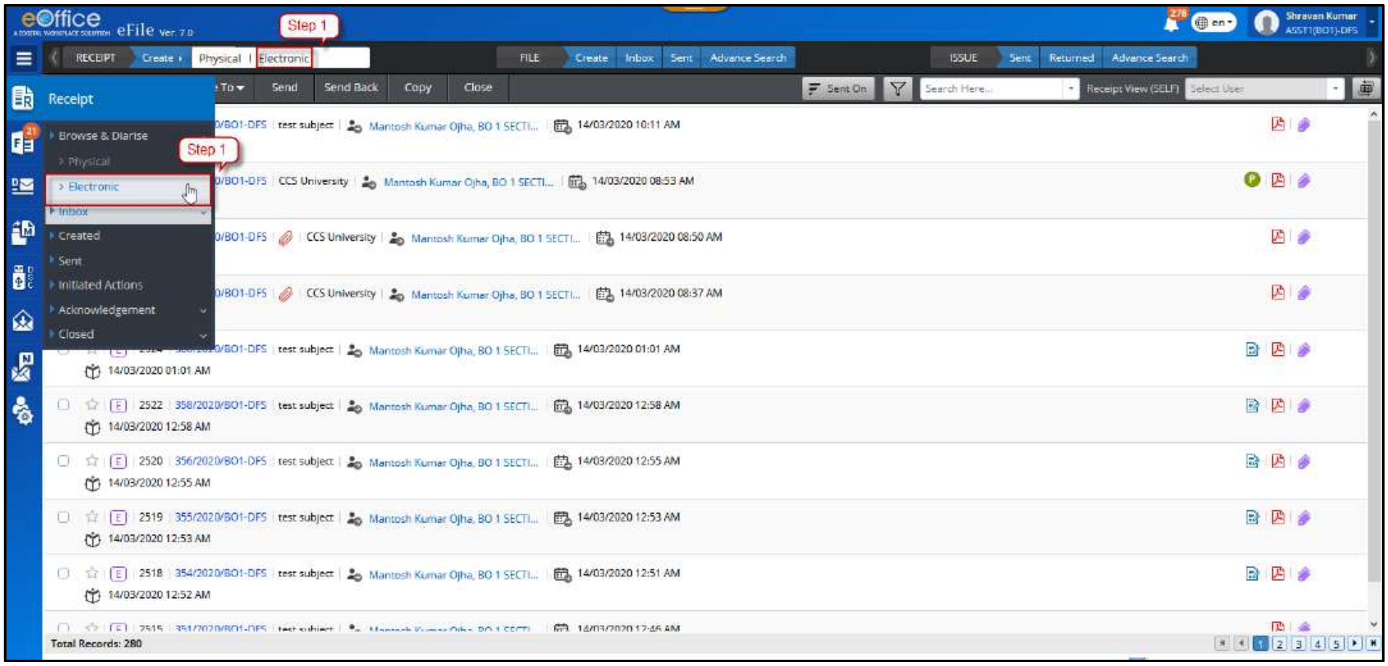



*Figure 1*

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

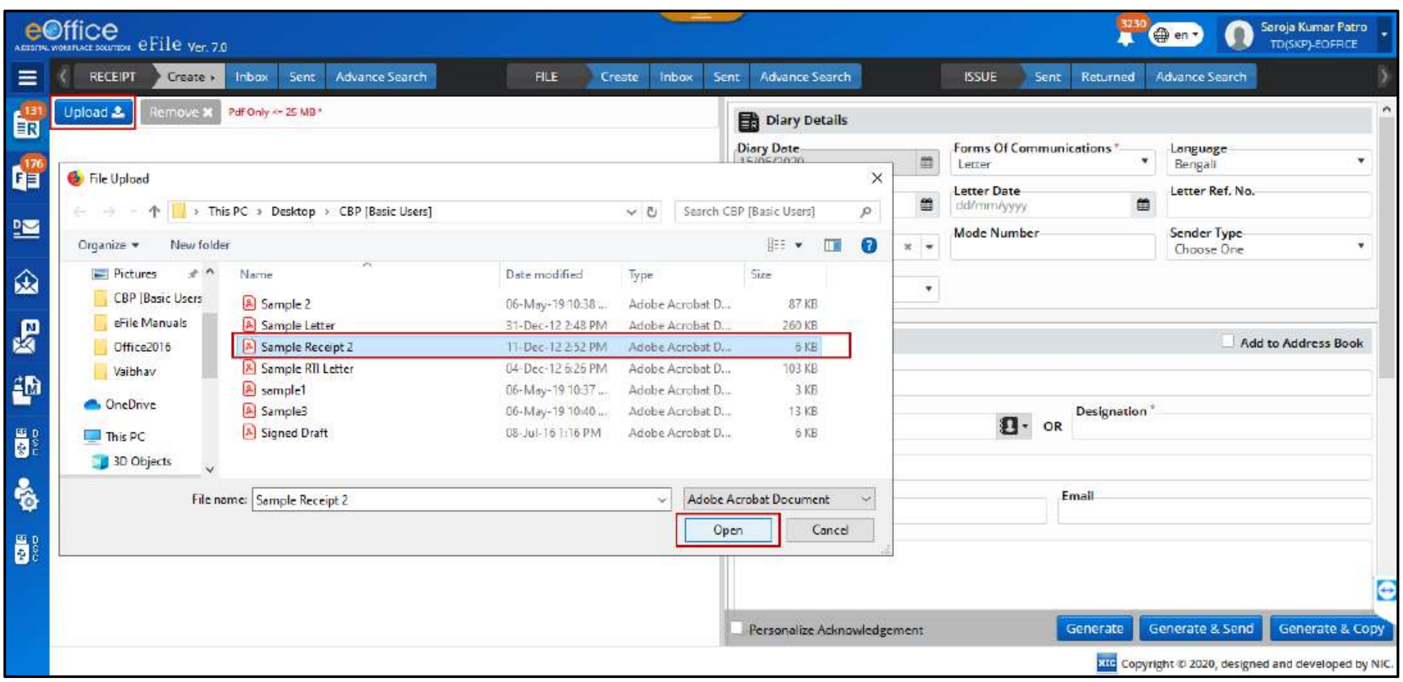



*Figure 2*

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

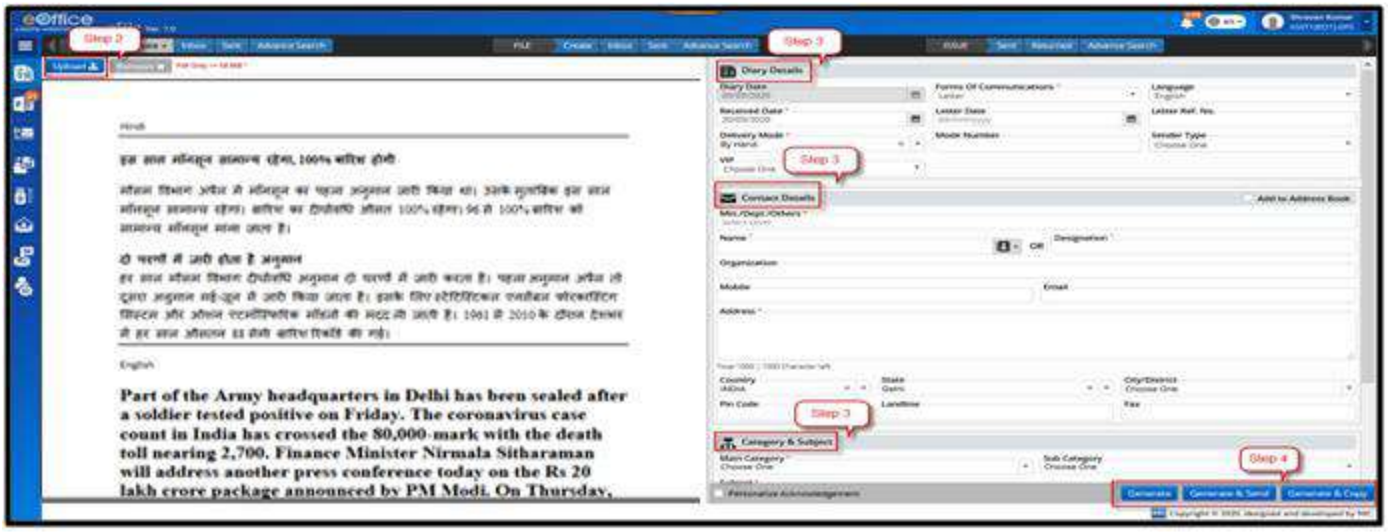



*Figure 3*

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


*Figure 4*

**Note:**

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

# Created Receipt List

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

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

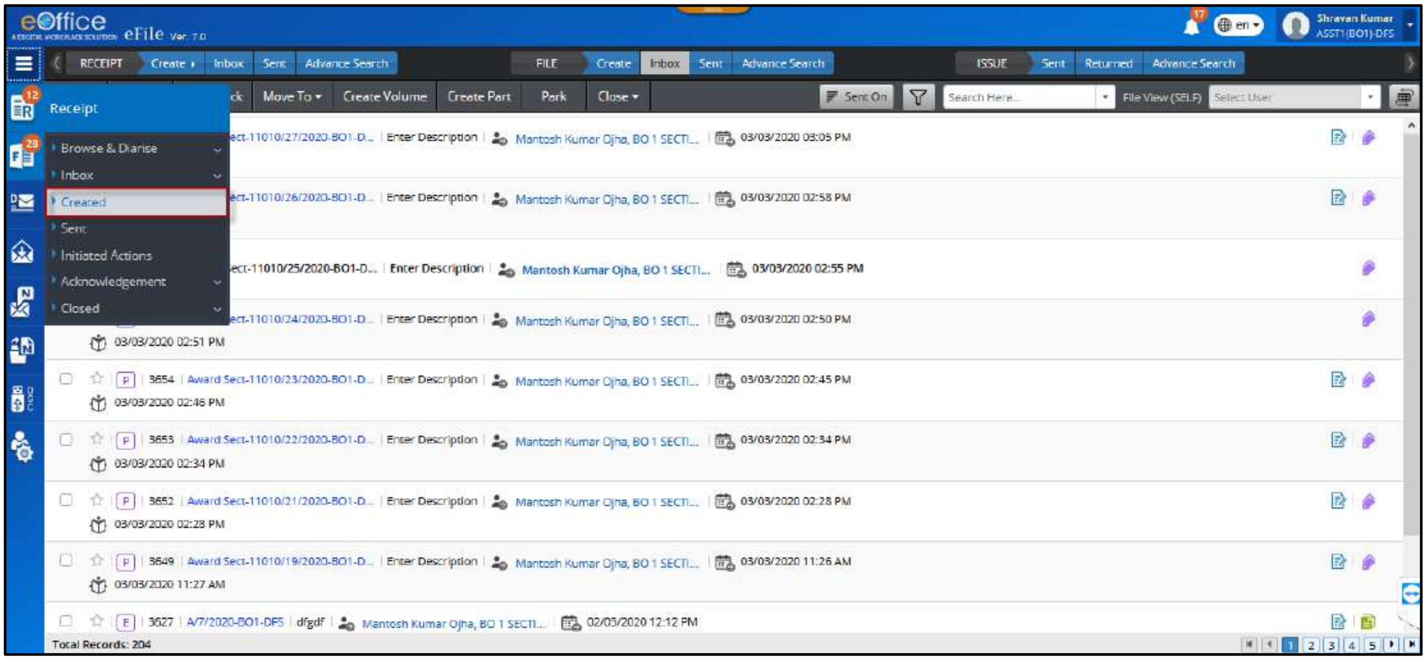



*Figure 5*

## *Description:*

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

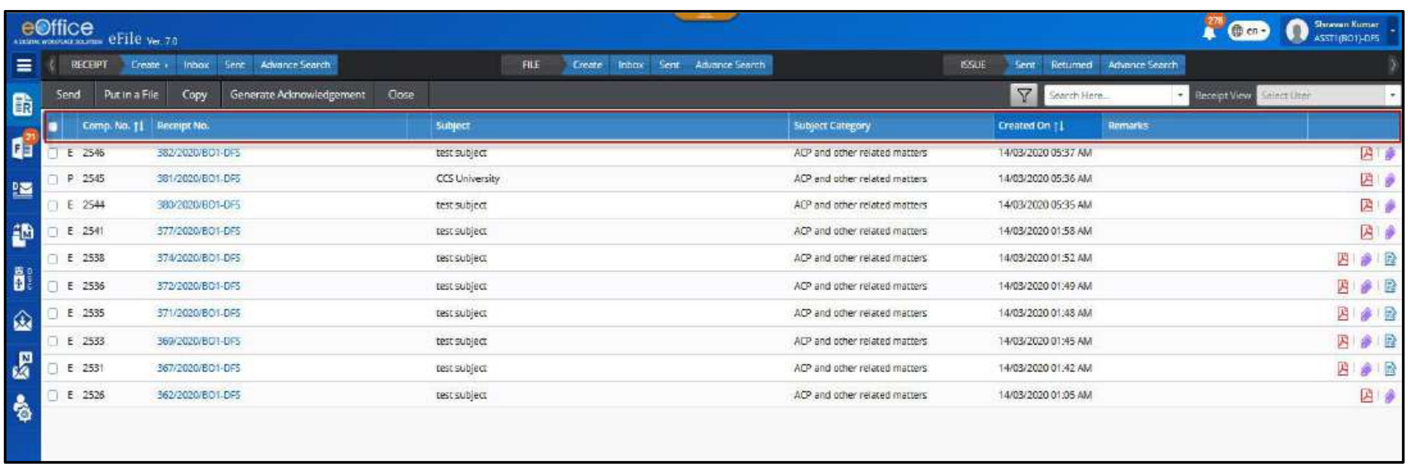



*Figure 6*

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

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

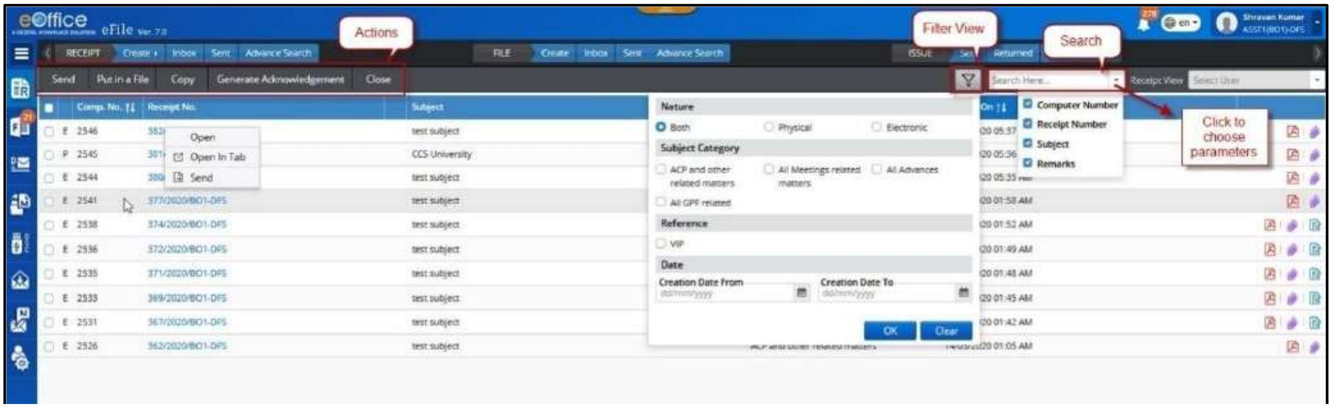



*Figure 7*

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

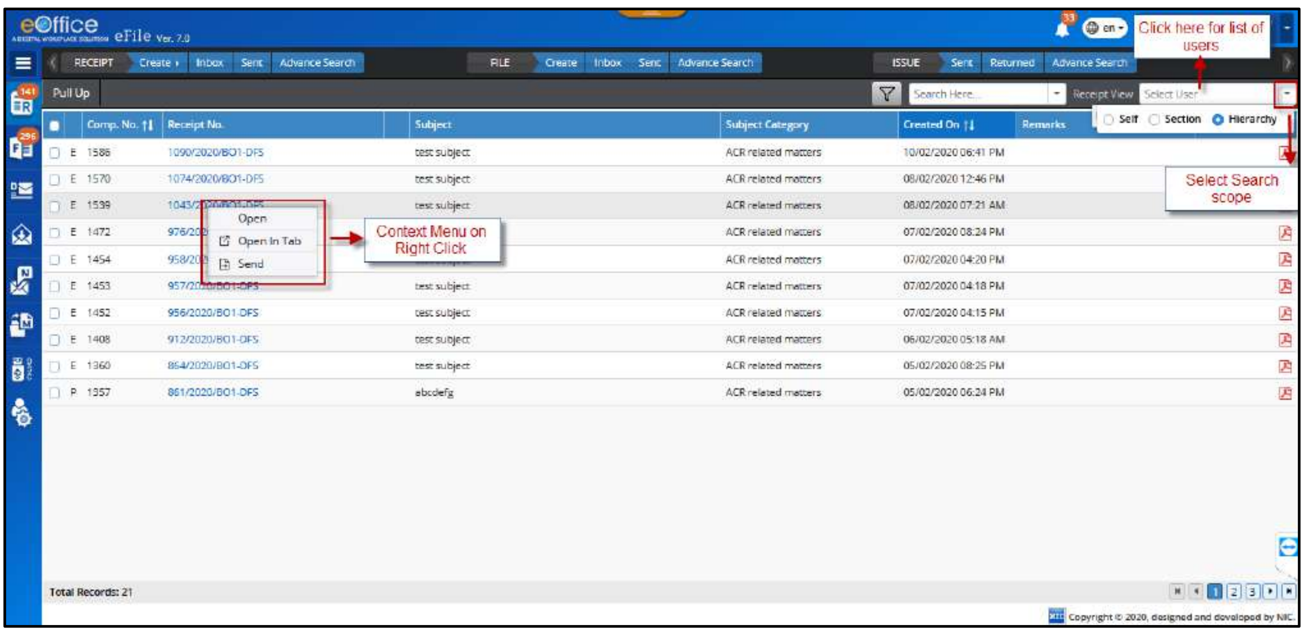



*Figure 8*

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

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

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

- Details of receipt such as diarized letter and other information can be viewed on receipt inner page by clicking on the **Receipt No**.

- Some additional actions that can be taken from receipt inner page are as follows –

  - Edit
  - Attach
  - Draft (For Electronic Receipt only)
  - Dispatch (For Physical Receipt only)
  - Convert (For Physical Receipt only)
  - Print

# Receipt Inbox

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

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

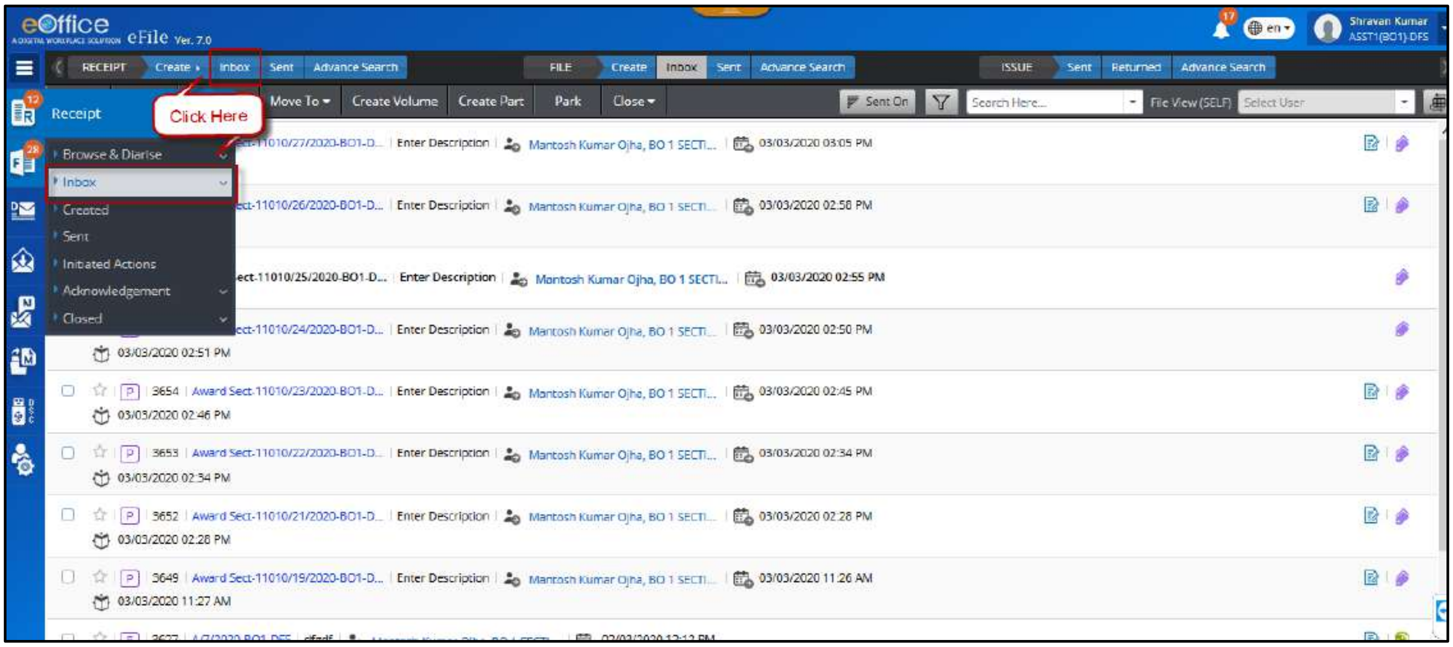



*Figure 9*

## *Description:*

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

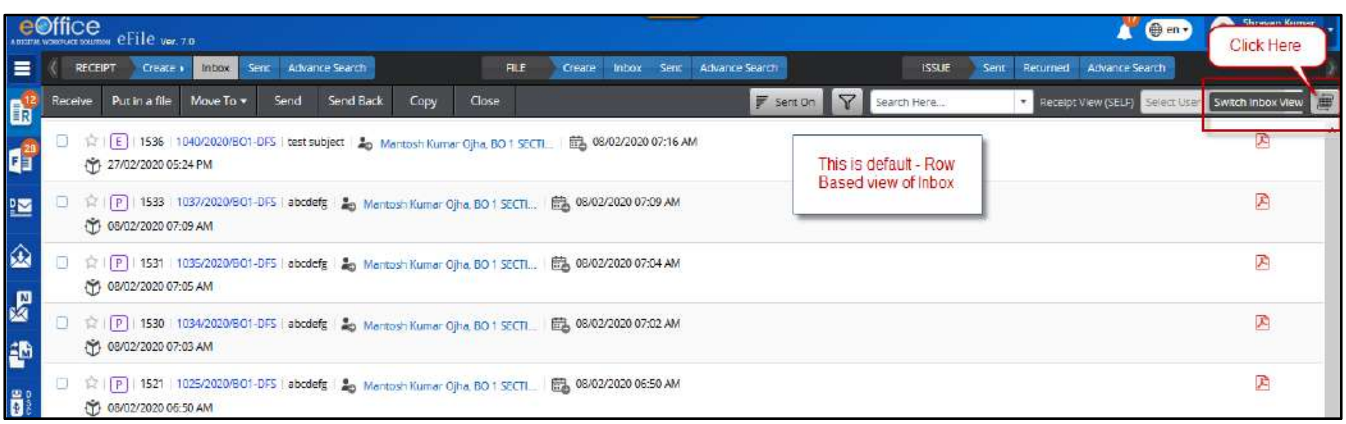



*Figure 10*

**Note:**

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

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

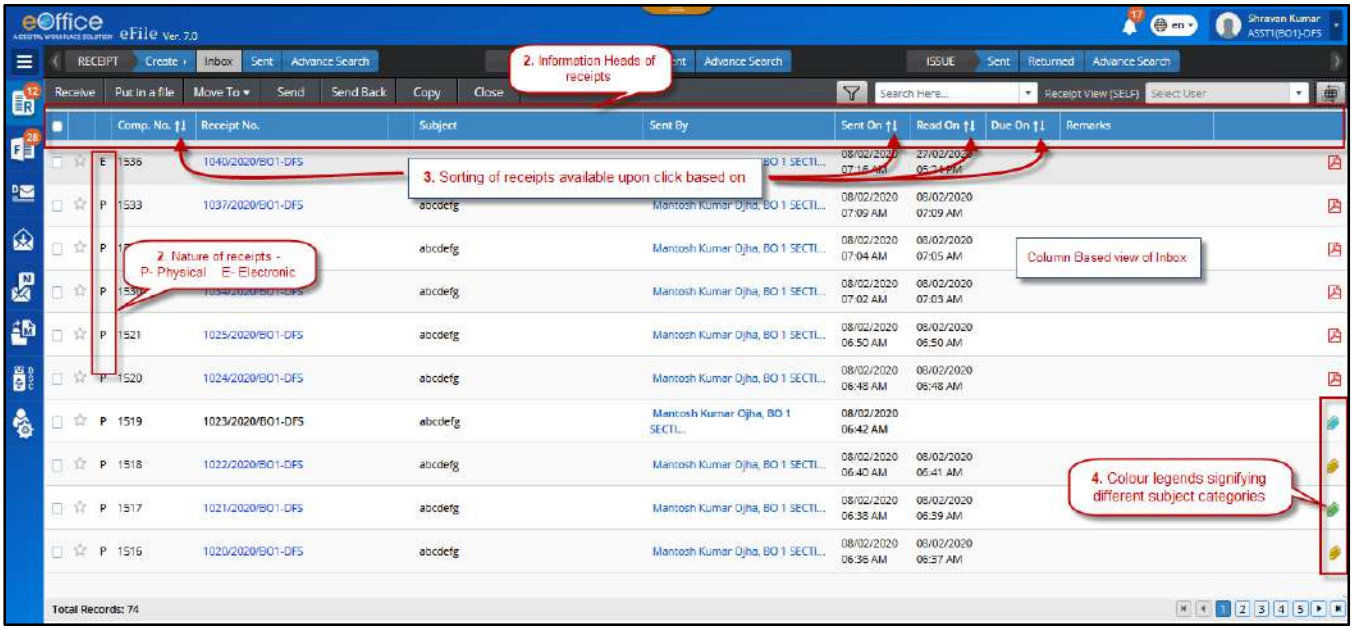



*Figure 11*

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

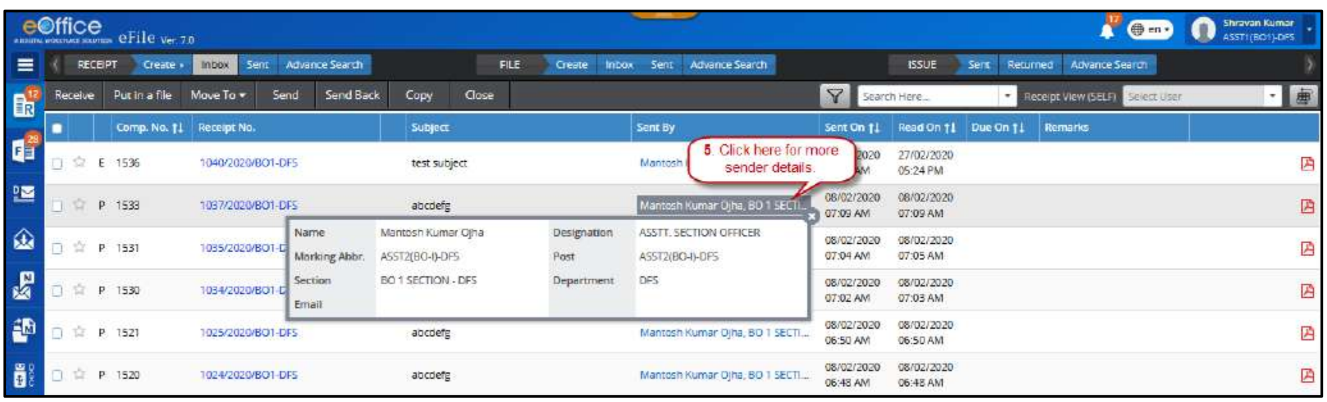



*Figure 12*

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

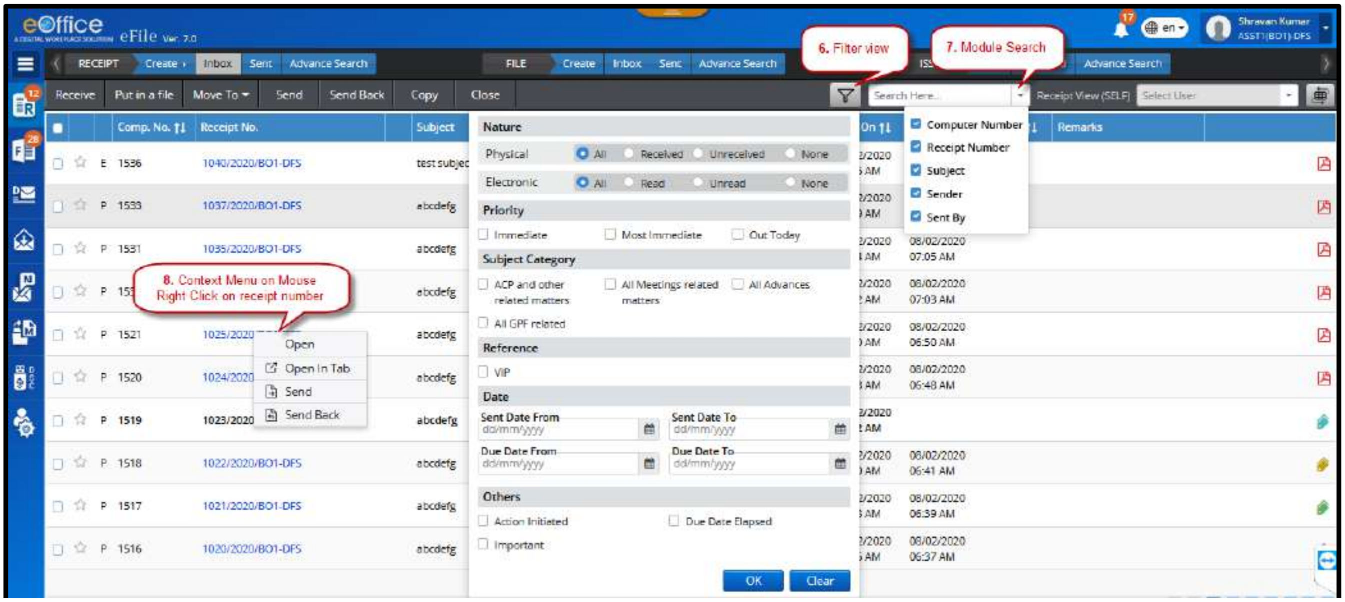



*Figure 13*

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


*Figure 14*

**Note:**

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

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


*Figure 15*

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

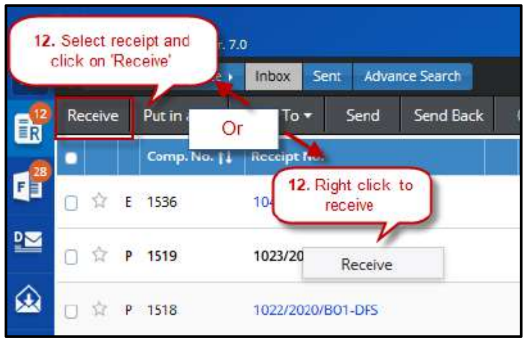



***Figure 16***

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

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

# Sub-Folders under Inbox

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

## Create Sub-Folders

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

### STEPS TO FOLLOW:

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

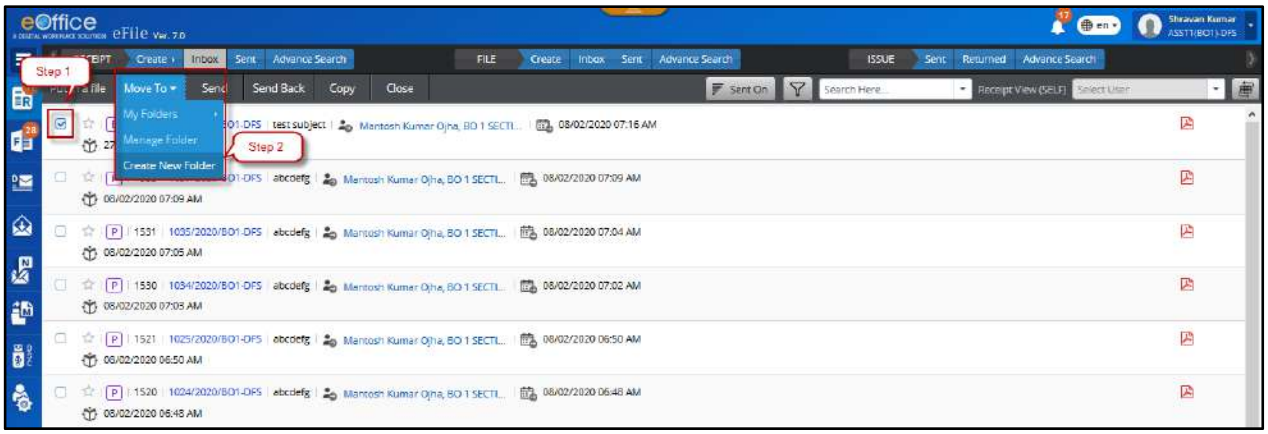



*Figure 17*

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

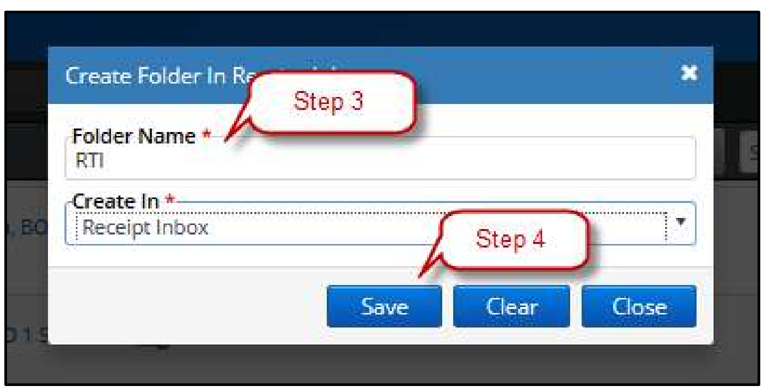



*Figure 18*

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

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

# Moving Receipt between the Folders

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

**STEPS TO FOLLOW:**

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

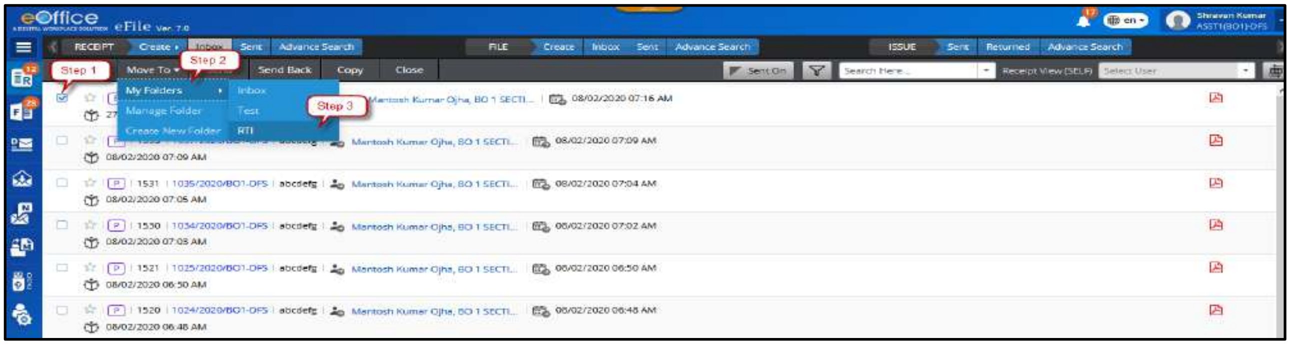



*Figure 19*

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

# Sub-Folder Management

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

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

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

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

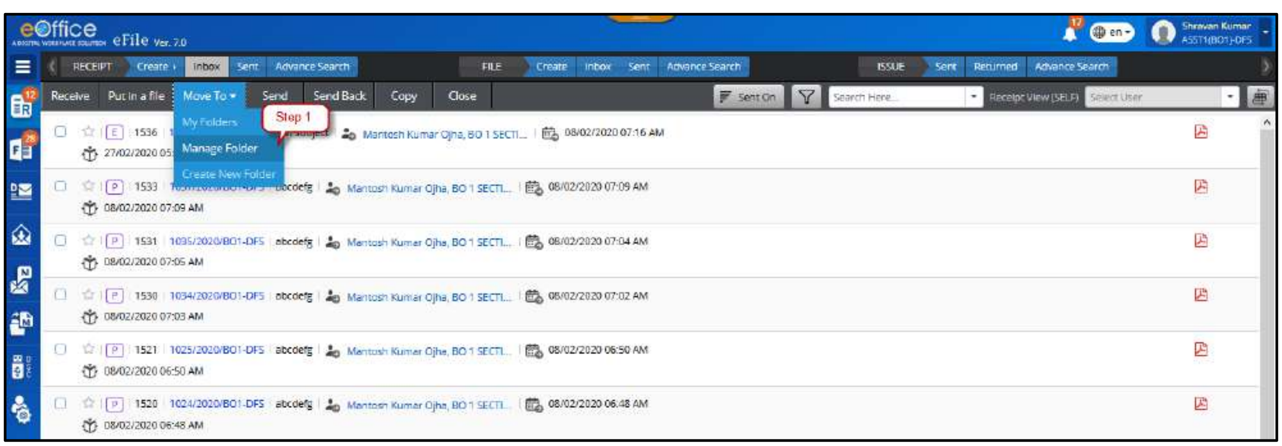



*Figure 20*

## STEPS TO RENAME SUB-FOLDER NAME

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


*Figure 21*

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

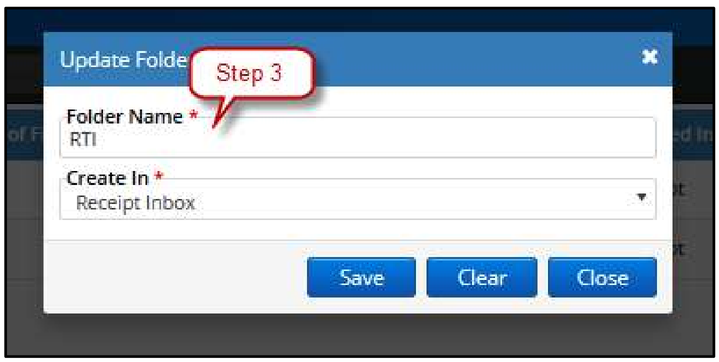



*Figure 22*

## STEPS TO DELETE SUB-FOLDER

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


*Figure 23*

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

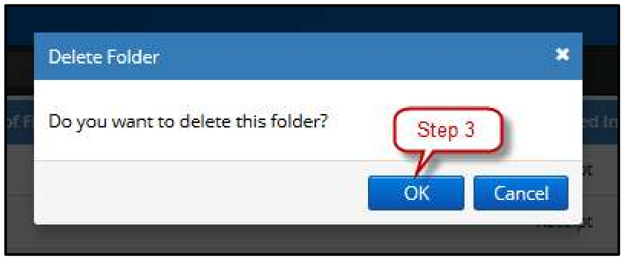



*Figure 24*


*Figure 25*

**Note:**

- Folder to be deleted must be empty.

# Edit Receipt (P/E) Details

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

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

**Important Points:**

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

**Steps to Follow:**

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

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

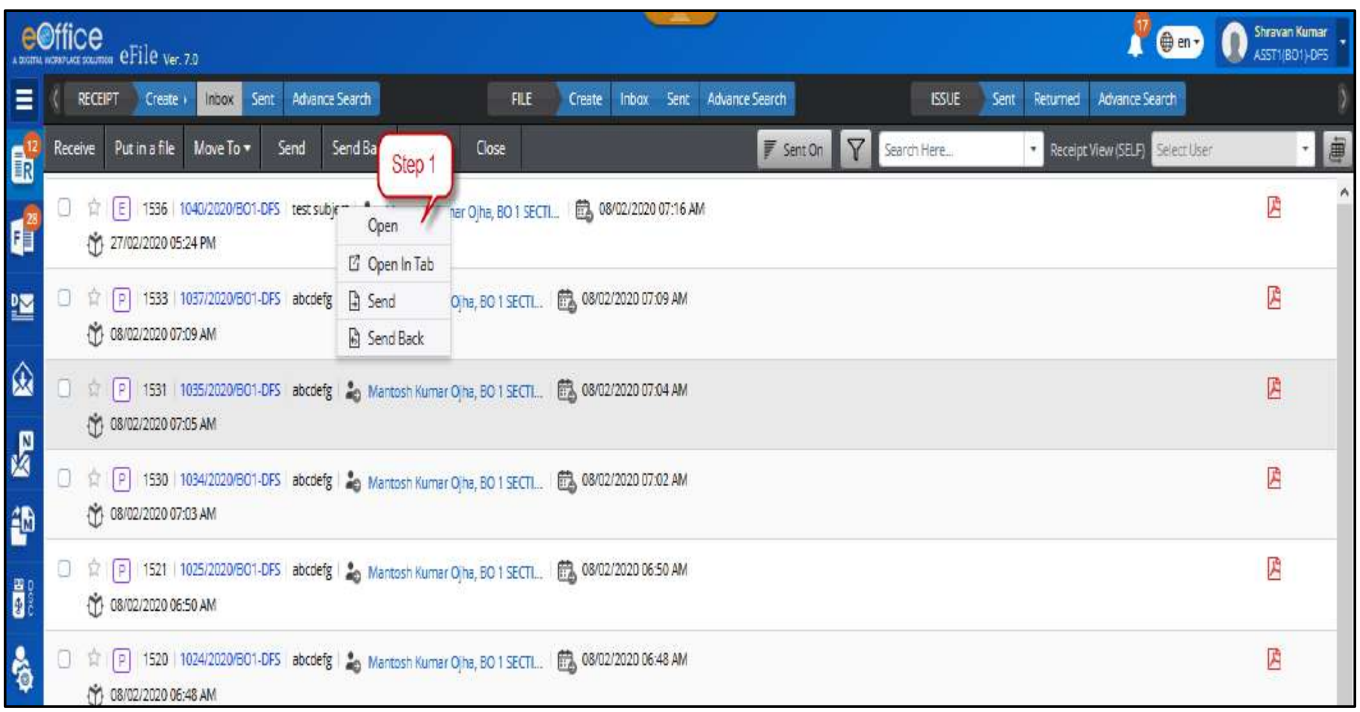



*Figure 26*

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

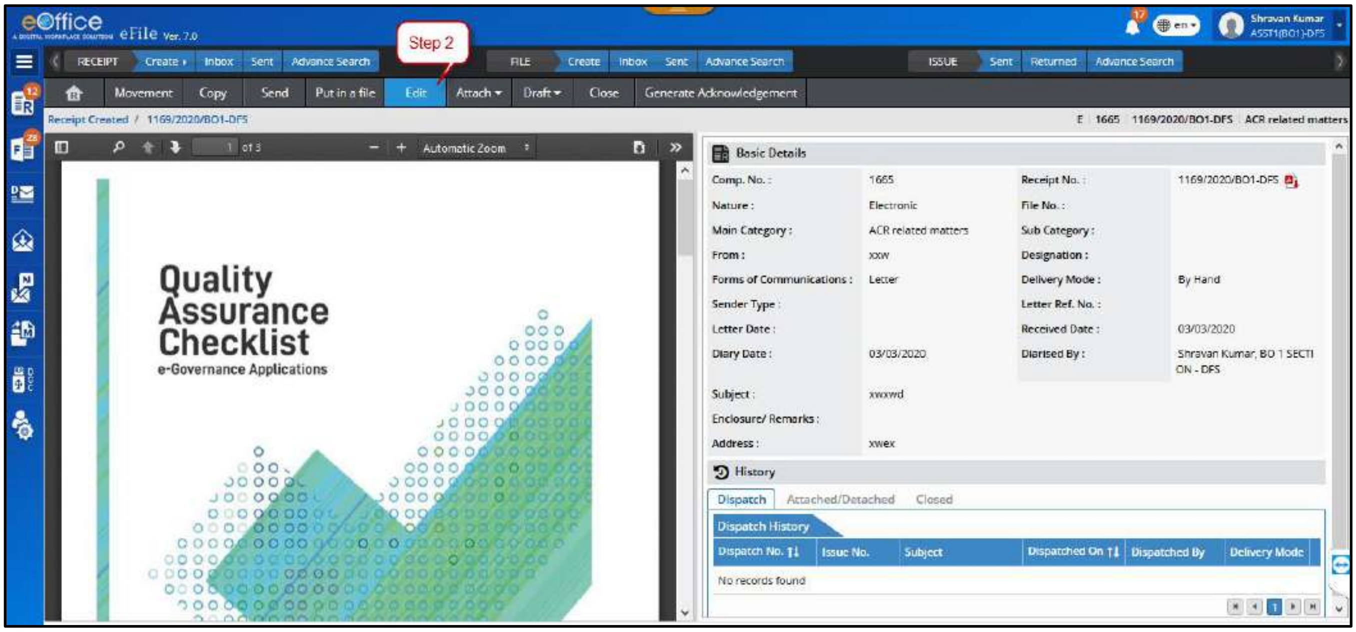



*Figure 27*

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

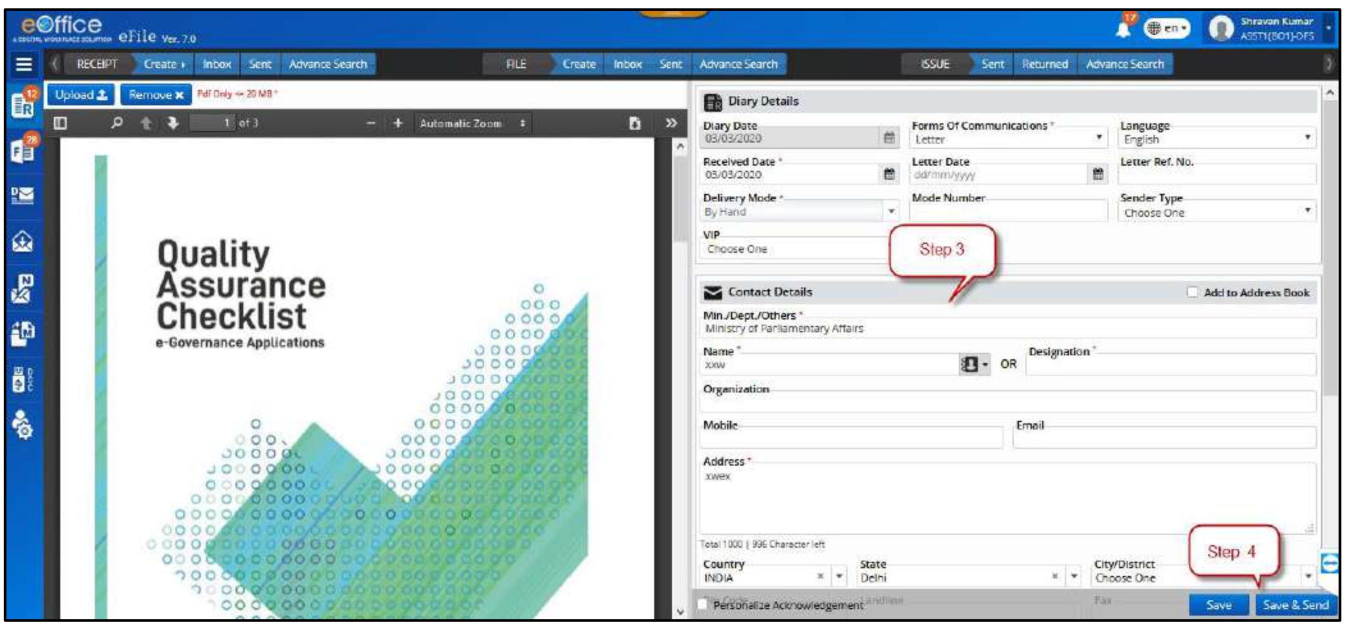



*Figure 28*

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

**Note:**

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

# Receipt Details

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

## Steps to view Receipt Details:

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

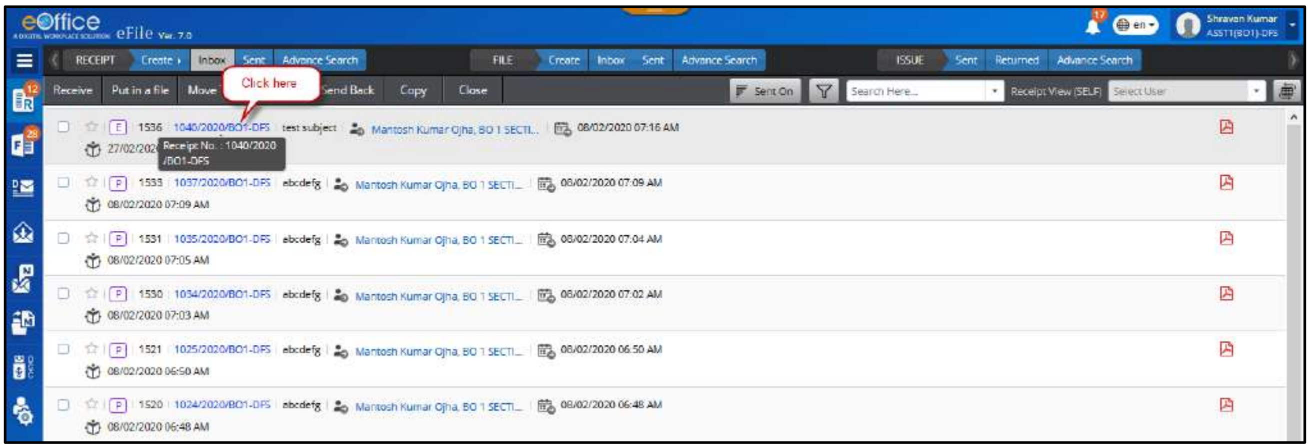


*Figure 29*

**Note:**

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

## *Description:*

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

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

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

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

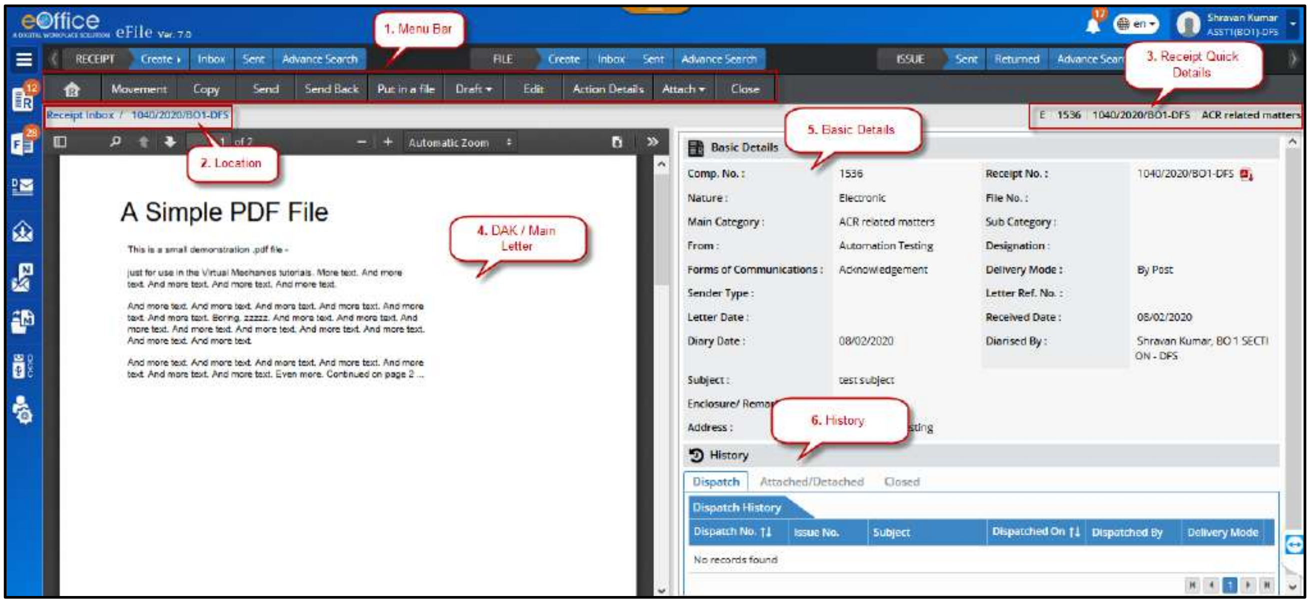



*Figure 30*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

5. **History**

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

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

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

# Put a Receipt inside a File

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

## Important Points:

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

## STEPS TO FOLLOW:

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

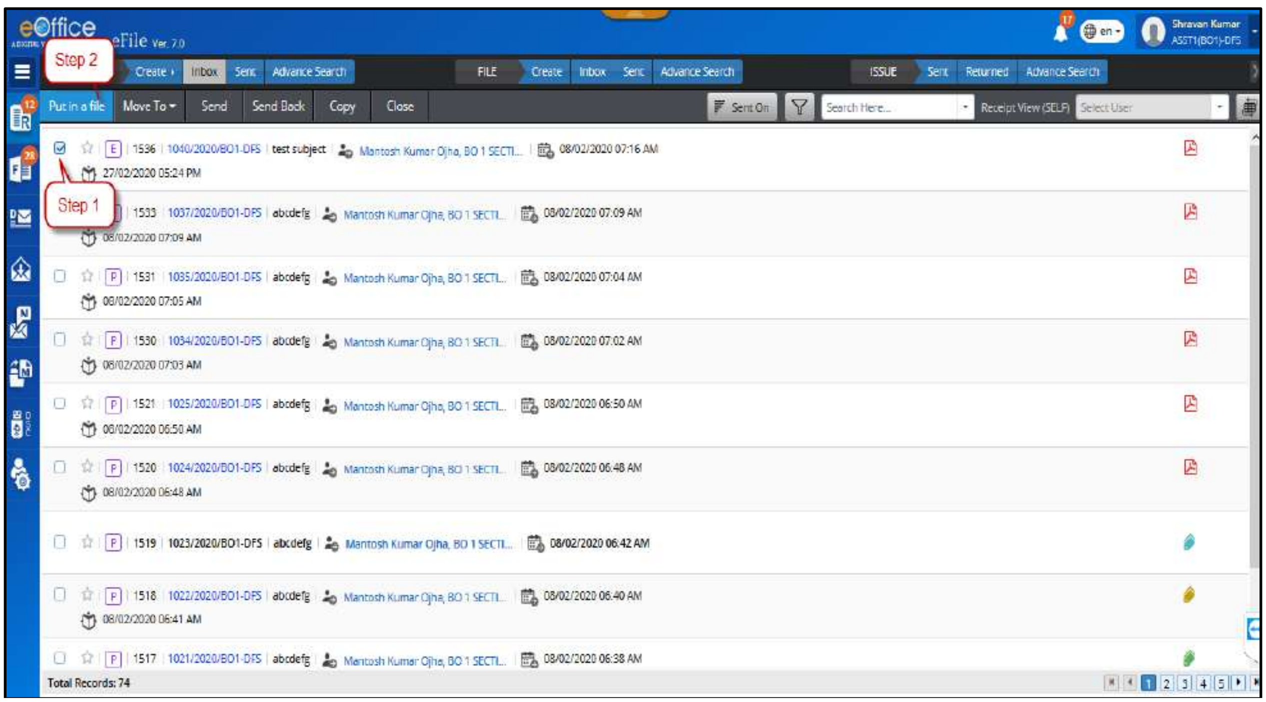



*Figure 31*

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

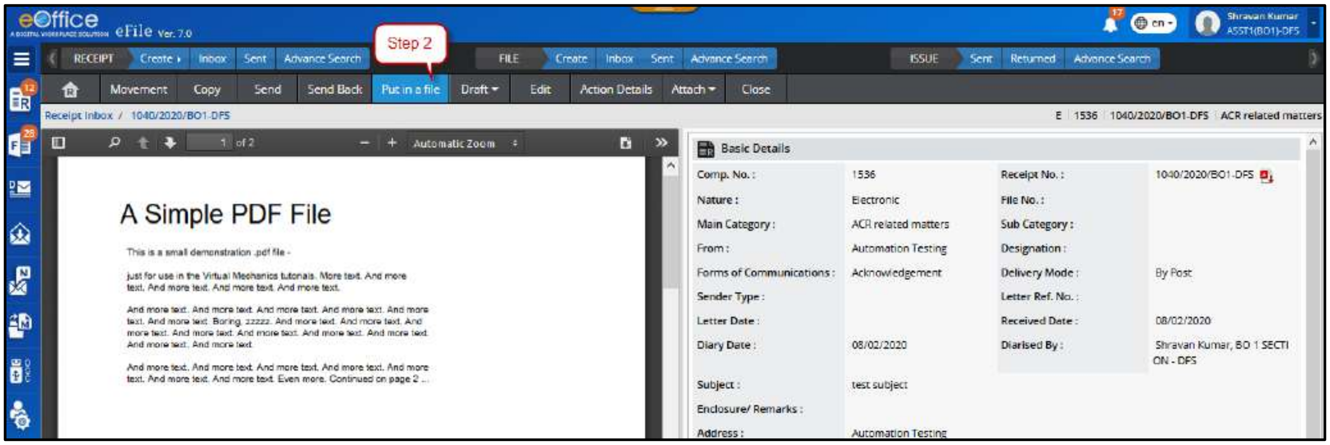



*Figure 32*

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

3. In the pop-up window, select or search the file from list displayed.
4. Provide mandatory **Remarks**.
5. Click **Attach** as shown in Figure 33:

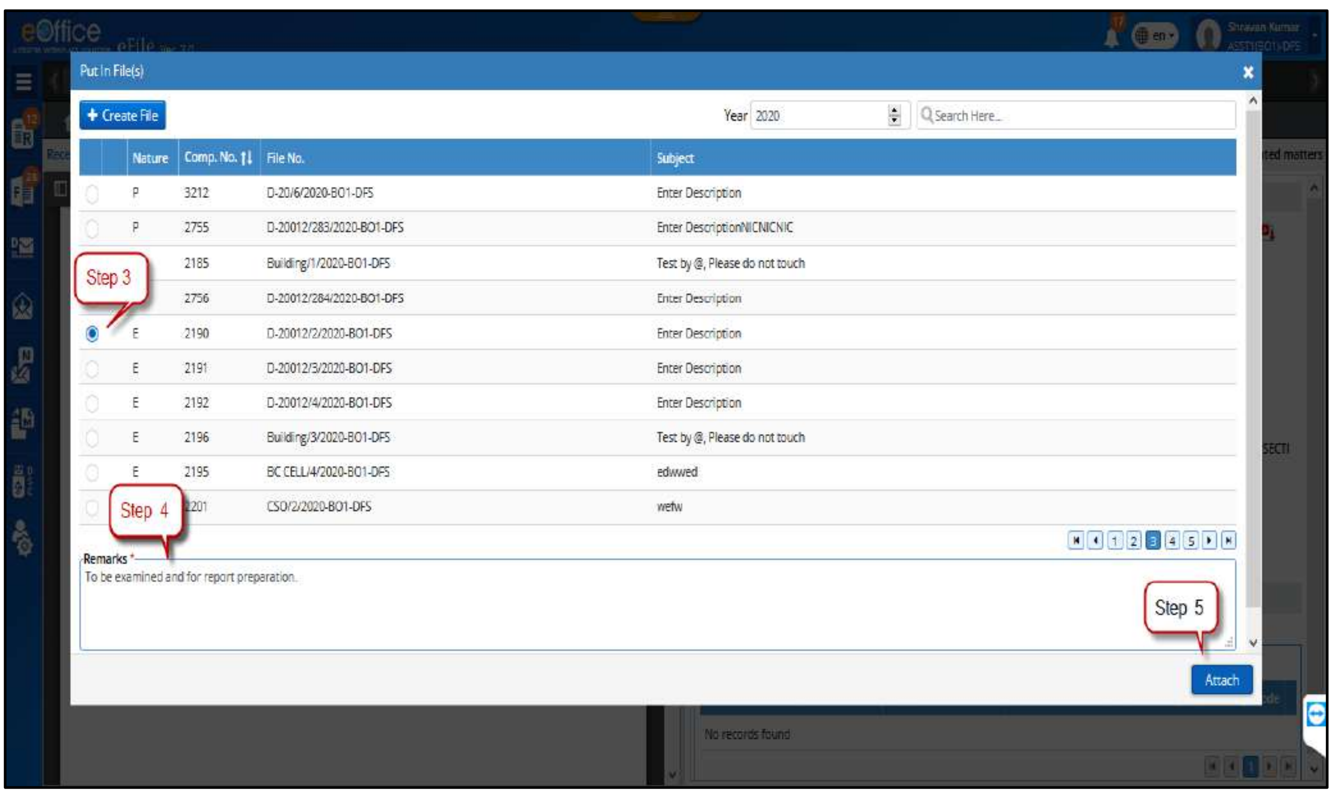



*Figure 33*

Or

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

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

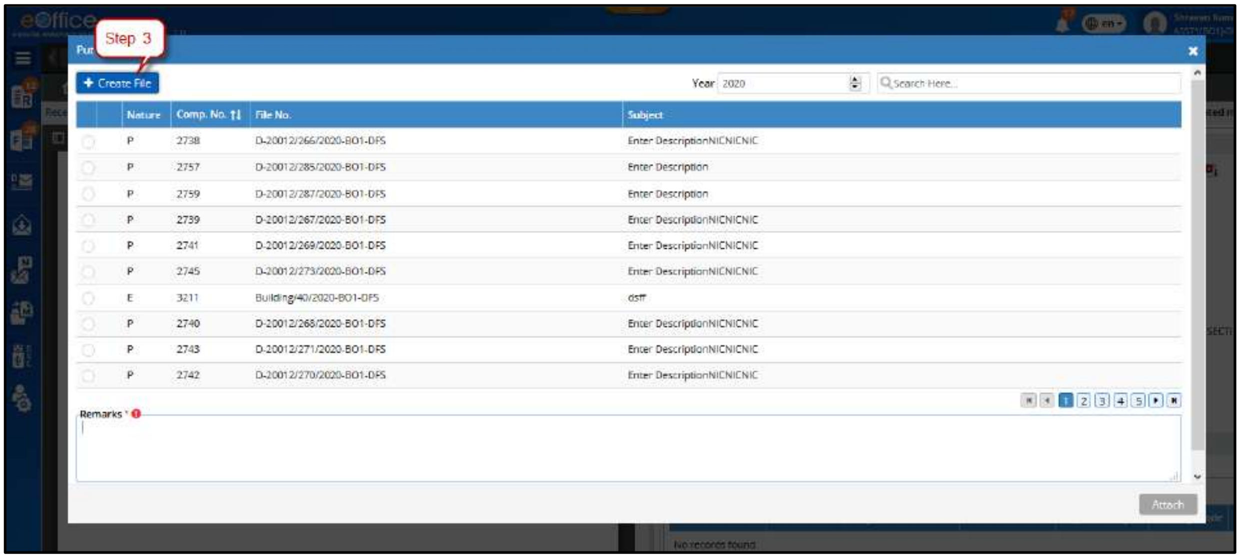



*Figure 34*

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

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

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

Or

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

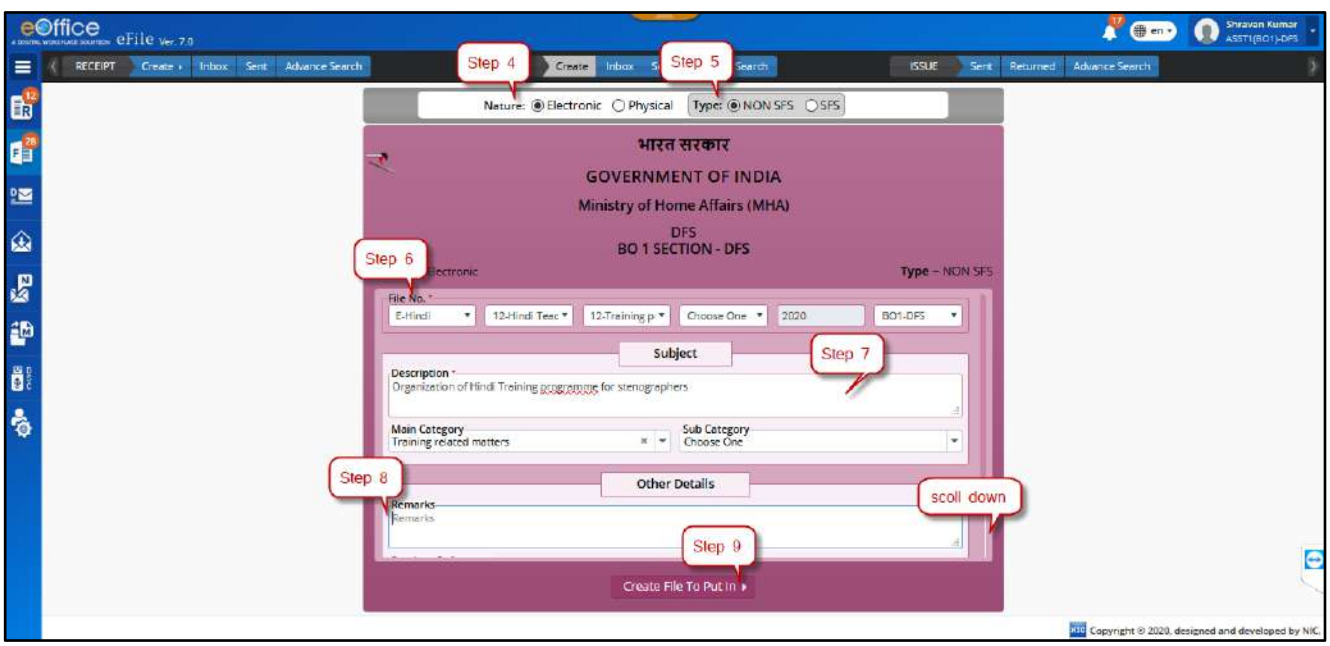



*Figure 35*

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

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

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

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

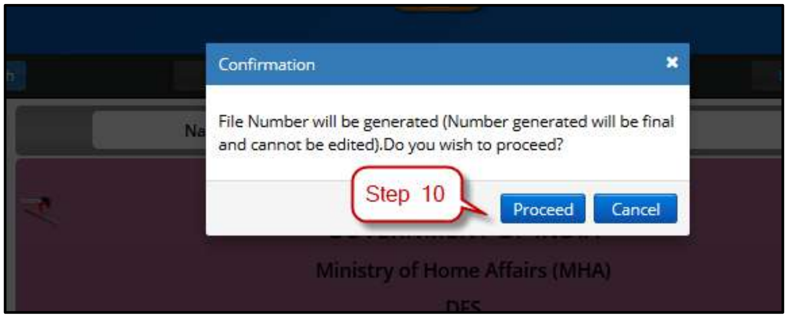



*Figure 36*

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

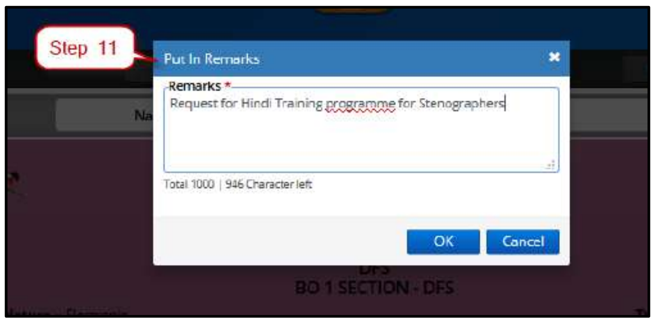



*Figure 37*

# Convert Receipt

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

## Important Points:

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

### STEPS TO FOLLOW:

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

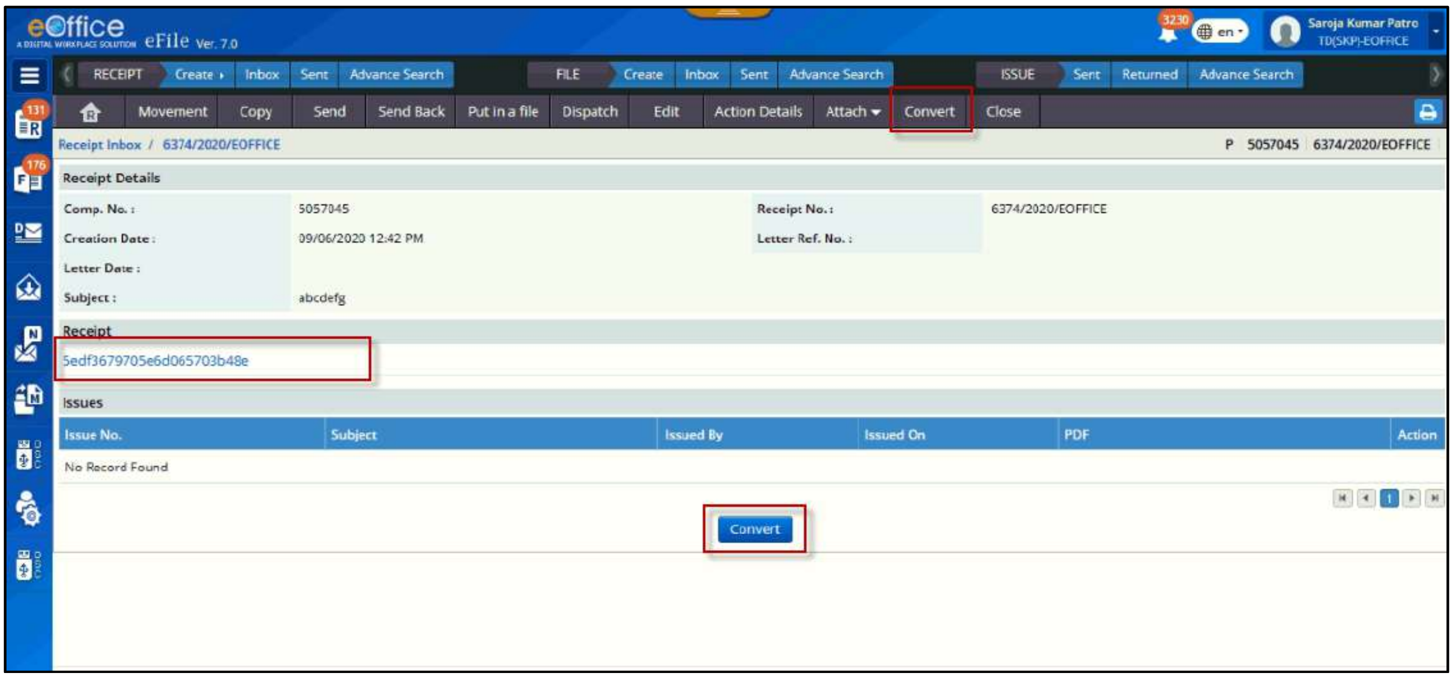



*Figure 38*

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

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

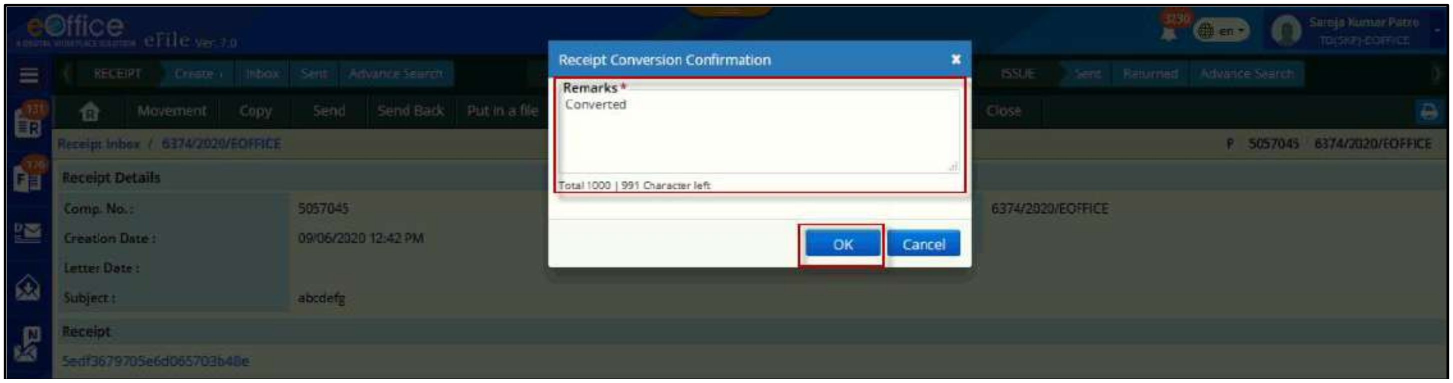



*Figure 39*

**Note:**

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

# Receipt Attachments

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

## Important Points:

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

## Attaching Files/Receipts with Receipt

### STEPS TO FOLLOW:

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

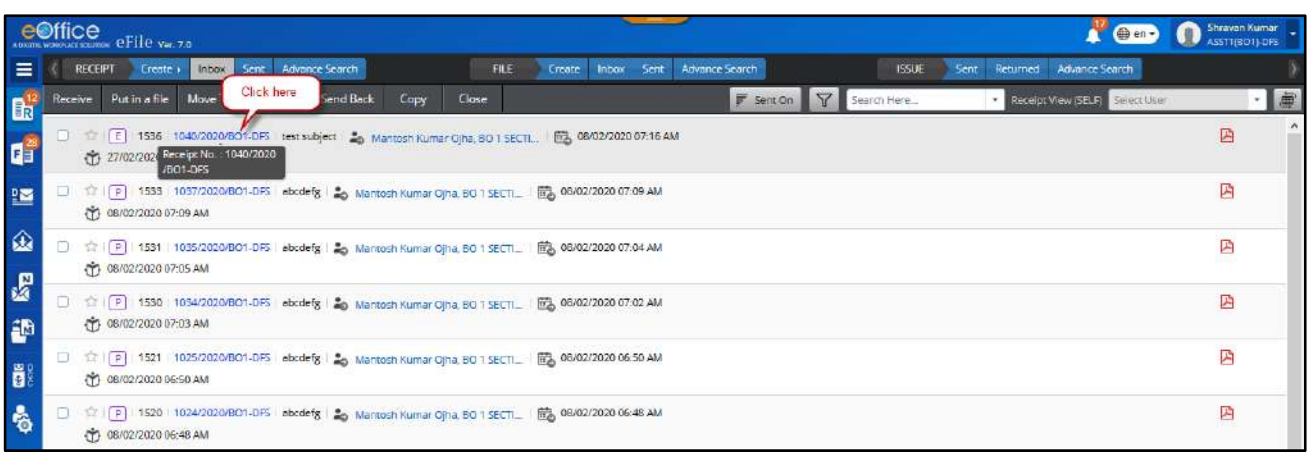



*Figure 40*

## To Attach Files

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

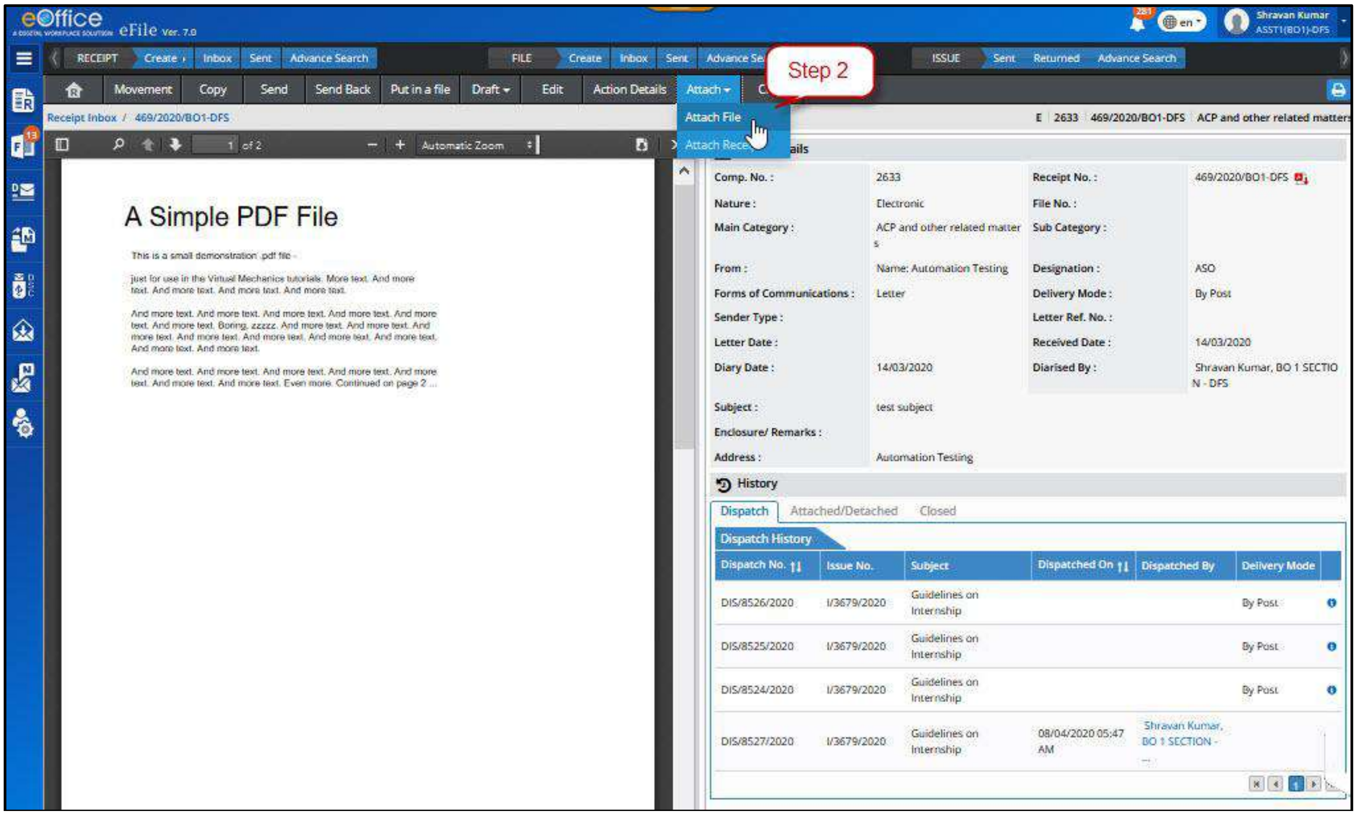



*Figure 41*

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

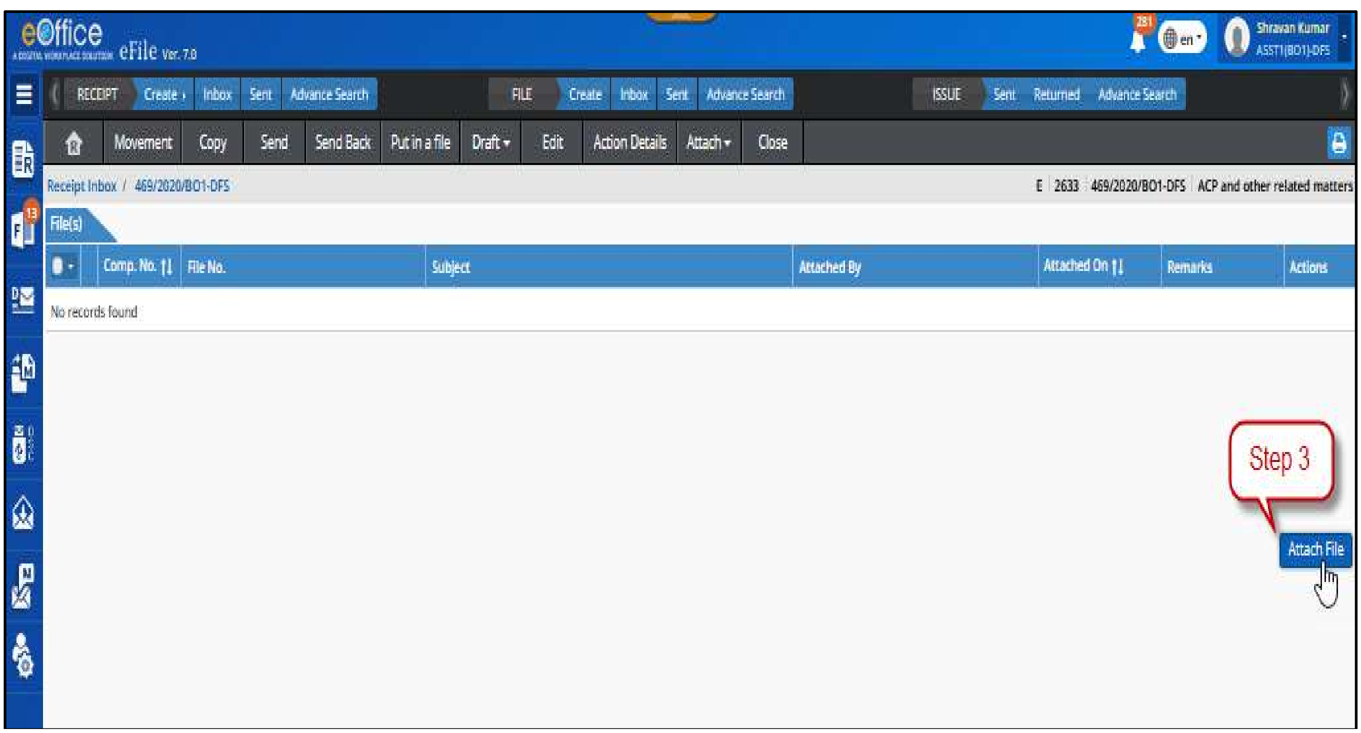



*Figure 42*

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

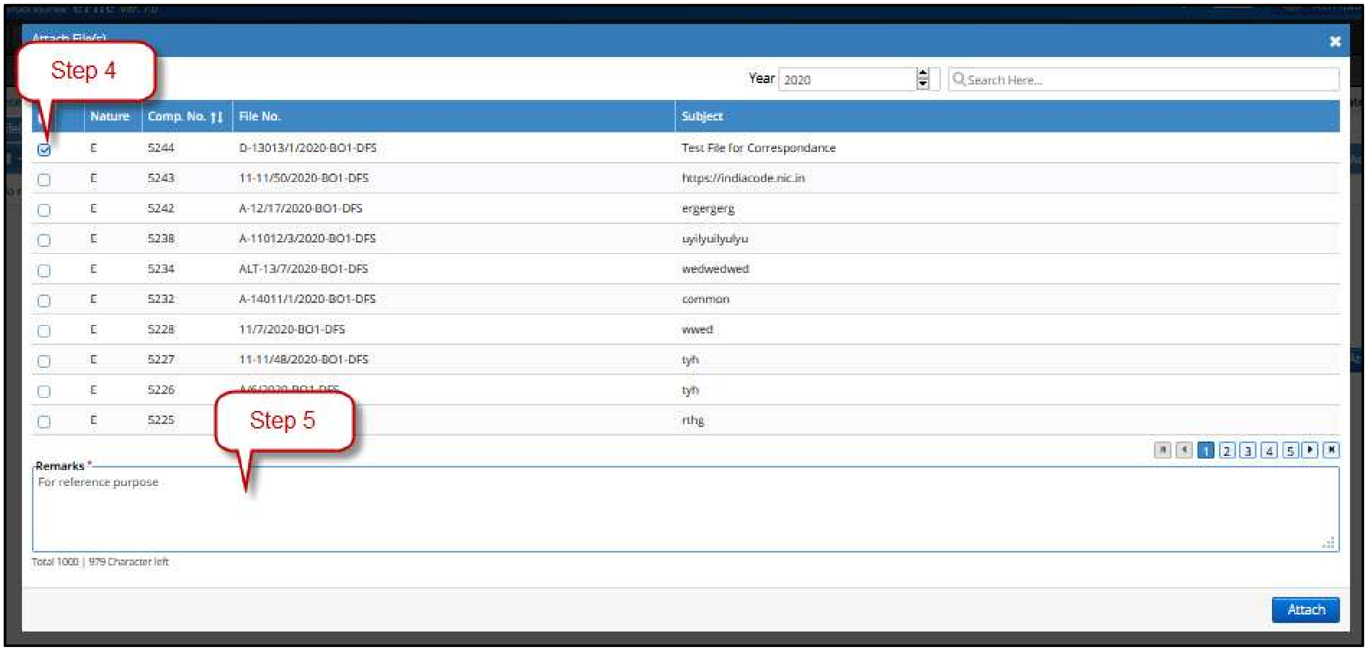



*Figure 43*

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

## To Attach Receipt(s)

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

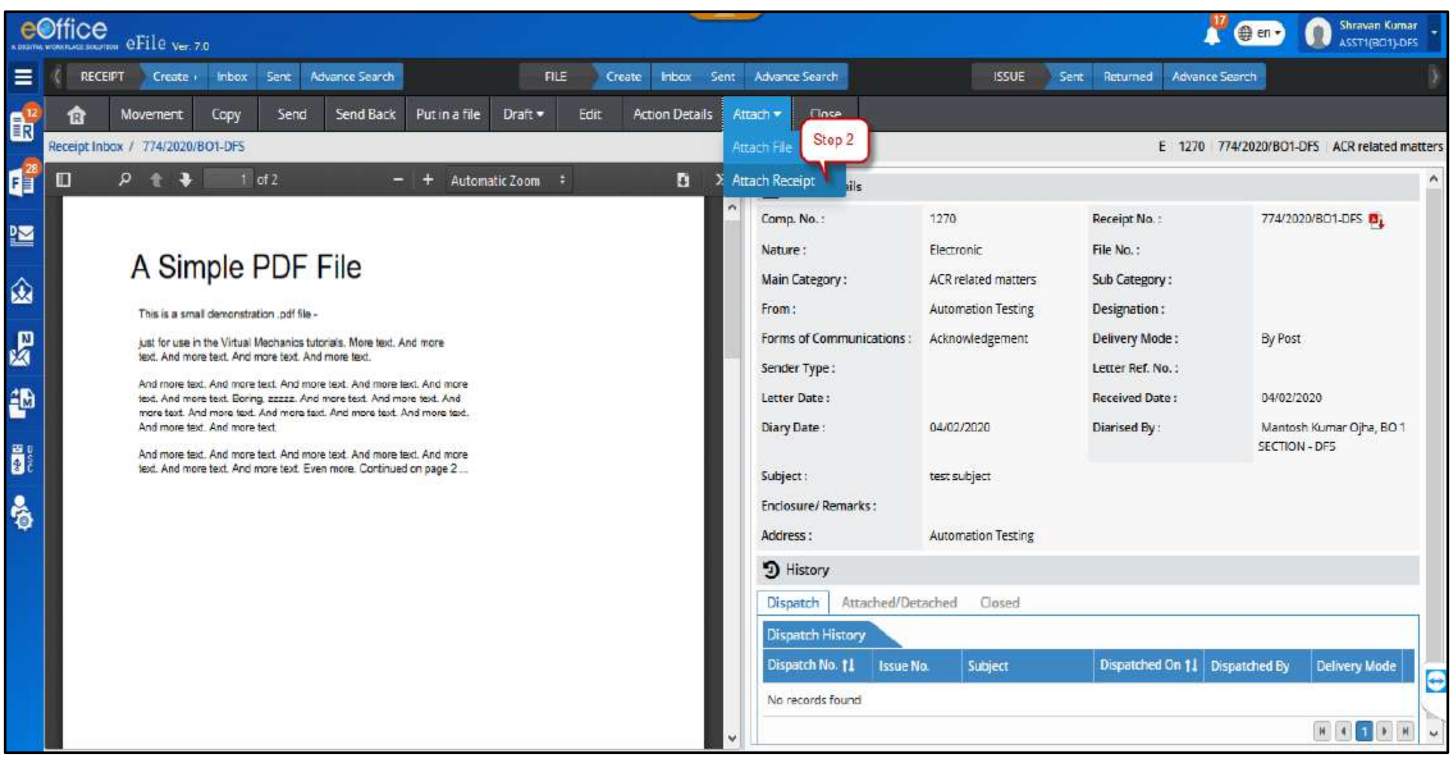



*Figure 44*

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

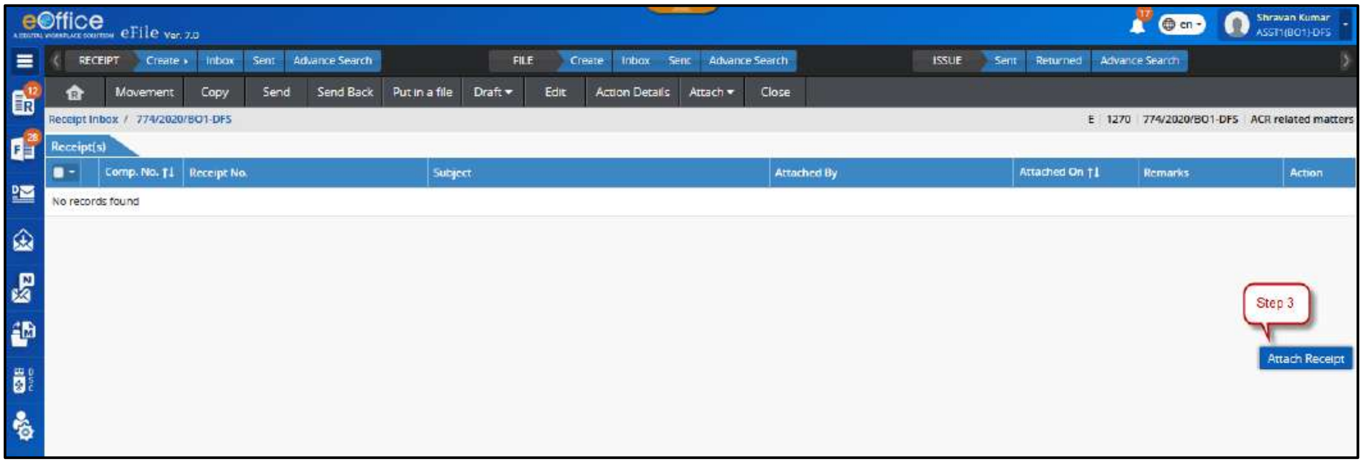



*Figure 45*

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

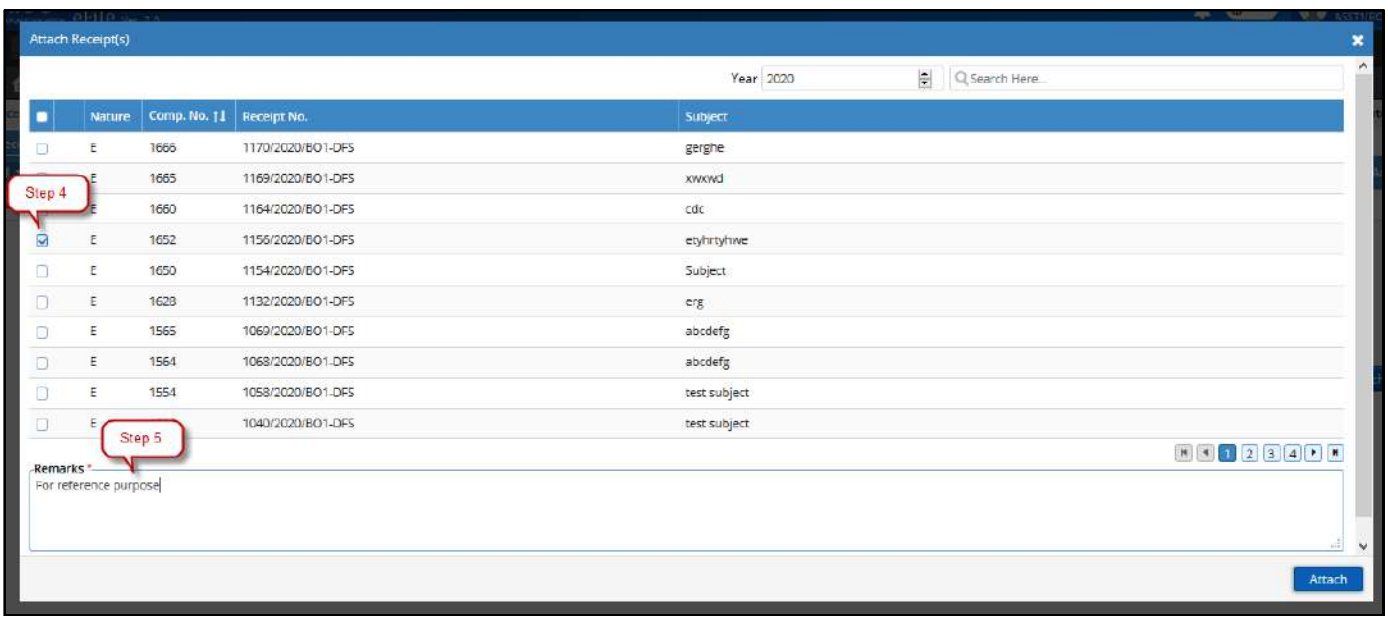



*Figure 46*

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

**Note:**

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

# Detaching Files/Receipts from Receipt

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

**STEPS TO FOLLOW:**

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

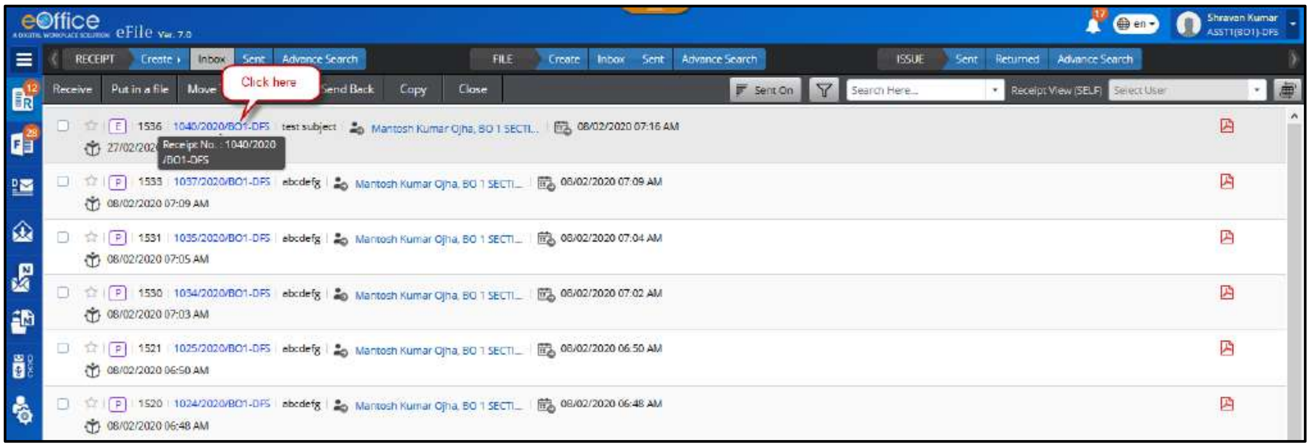



*Figure 47*

## To Detach File(s)

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

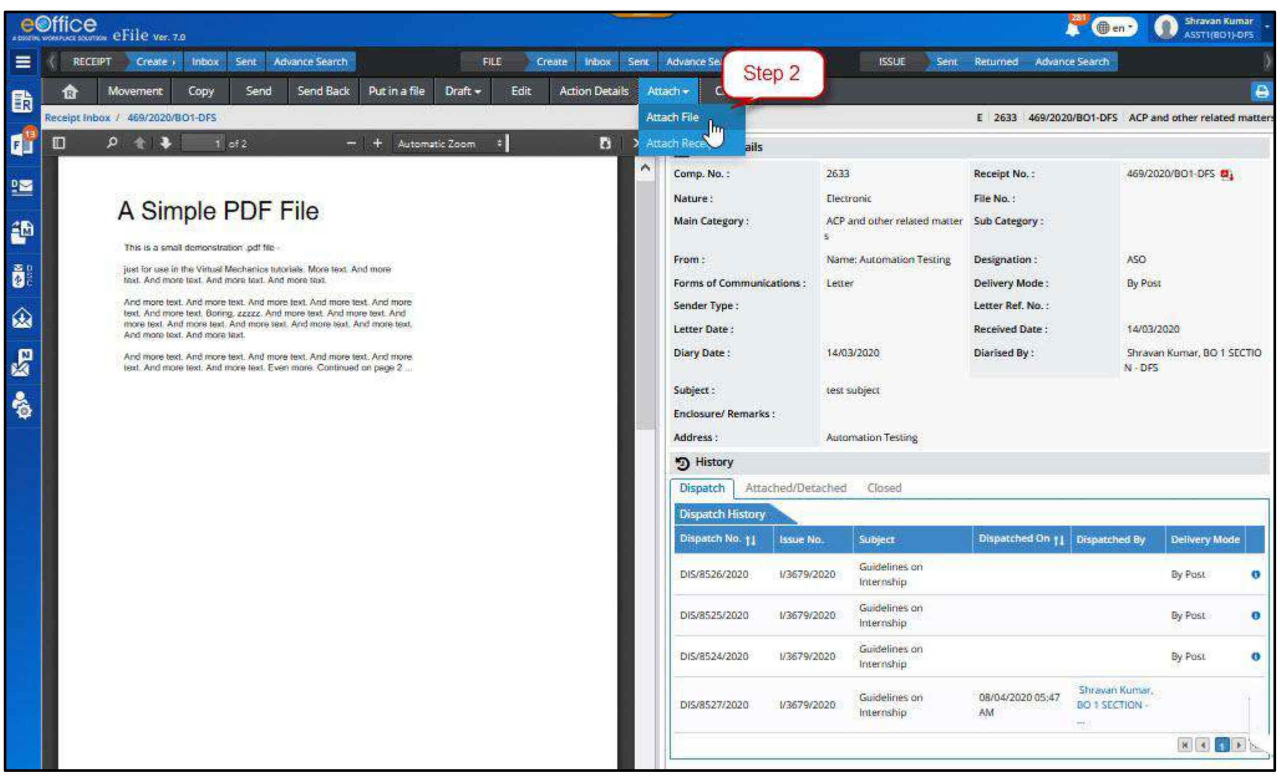



*Figure 48*

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

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

## To Detach Receipts

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

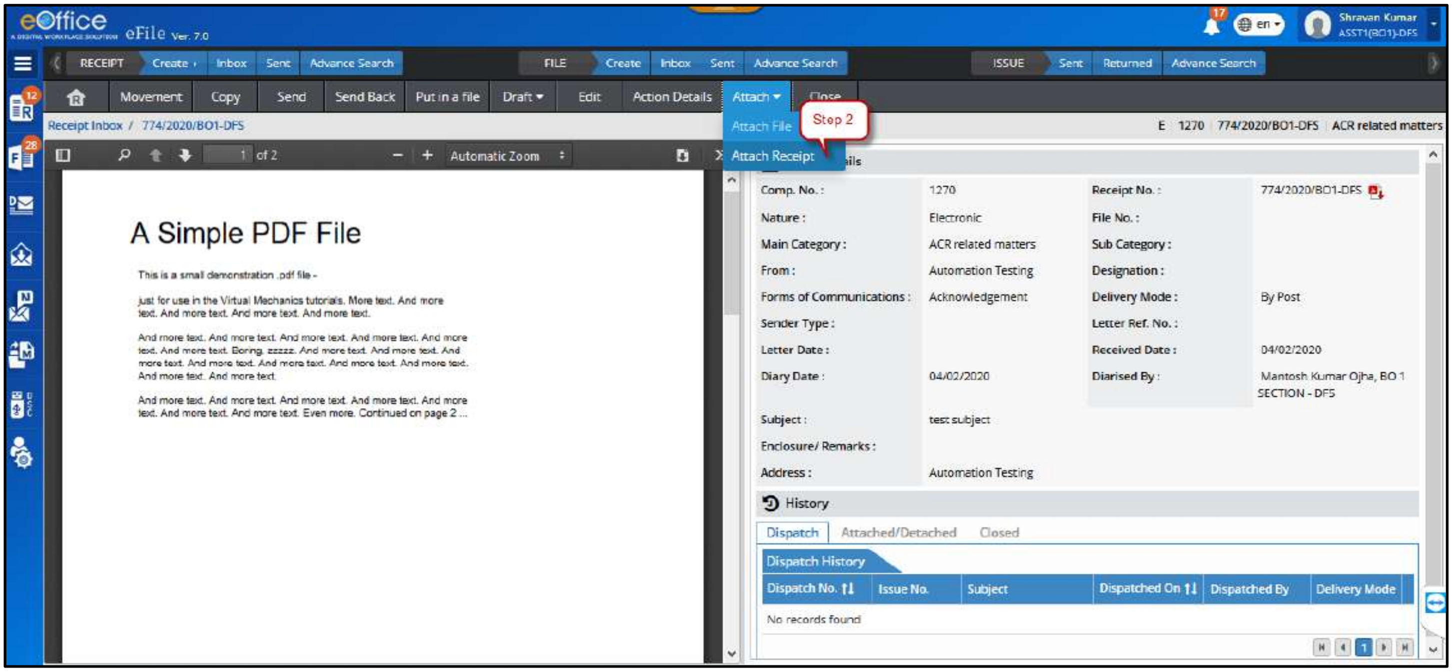



*Figure 49*

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

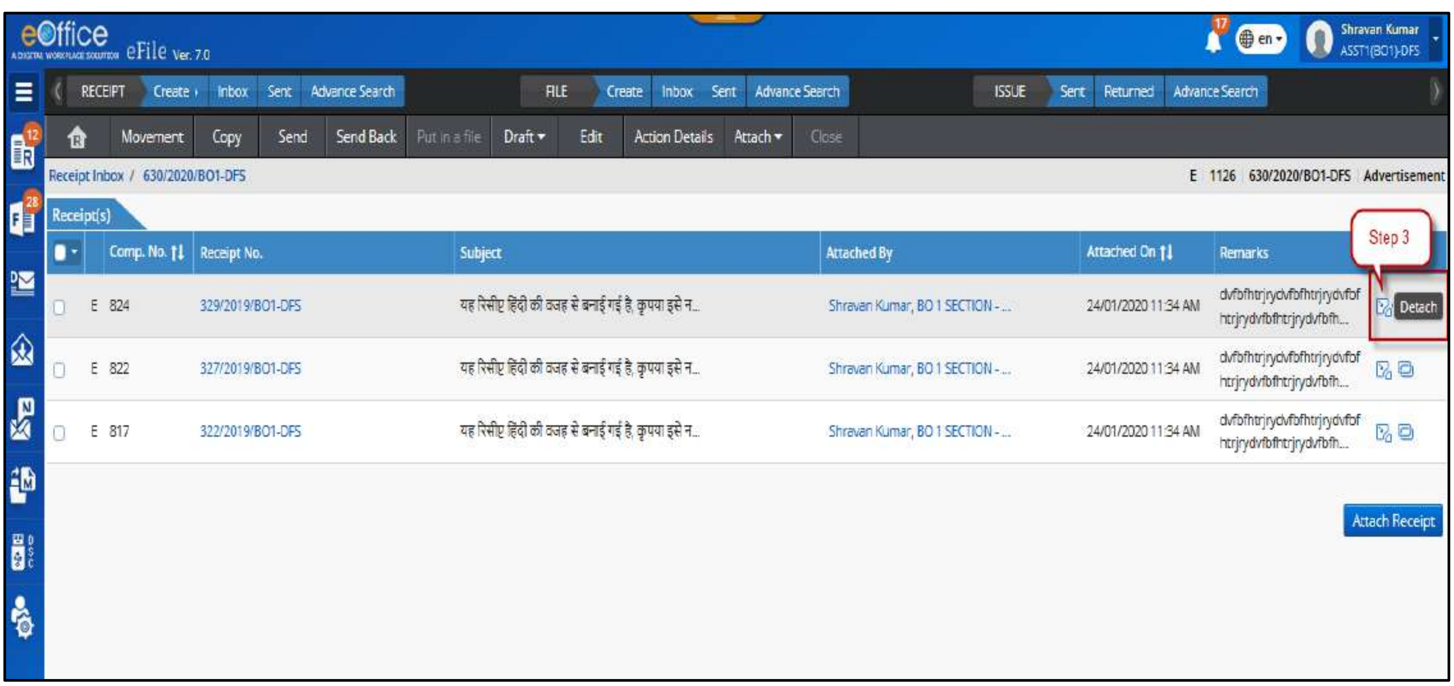



*Figure 50*

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

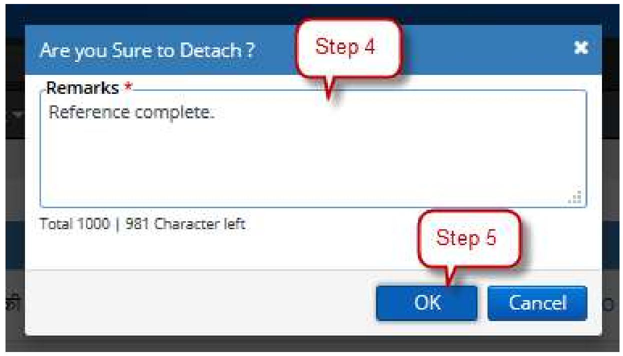



*Figure 51*

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

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

# Attach with another Receipt

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

**STEPS TO FOLLOW:**

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

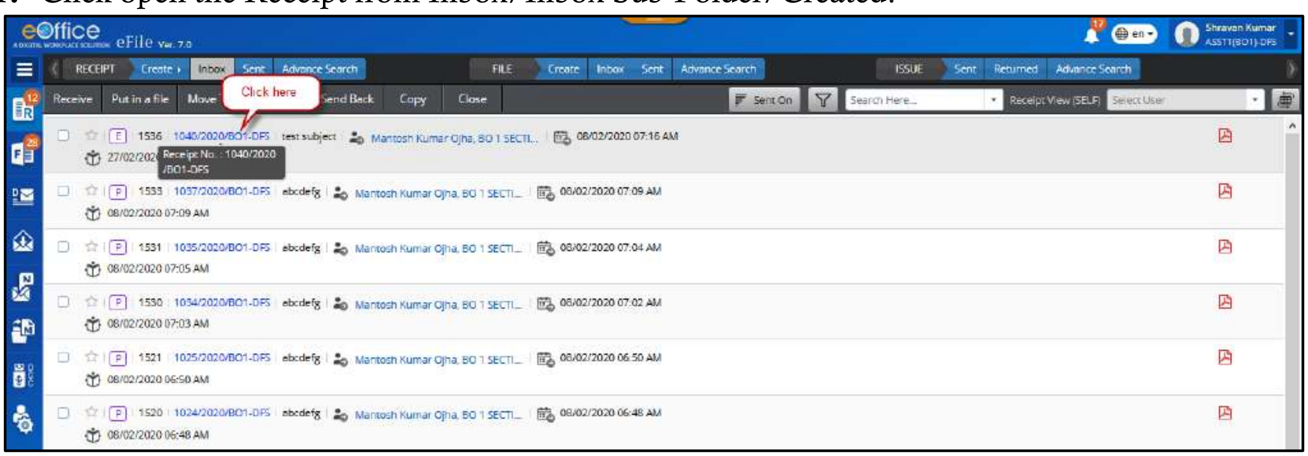



**Figure 52**

**To Detach Files and attach with another Receipt**

2. Under **Attach** action in the menu bar, click **Attach File**.

3. Click **Attach with Another** icon adjacent to attached File record in the list.

4. Select the receipt with which you wish to attach it within the pop-up window.

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

## To Detach Receipts and attach with another Receipt

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

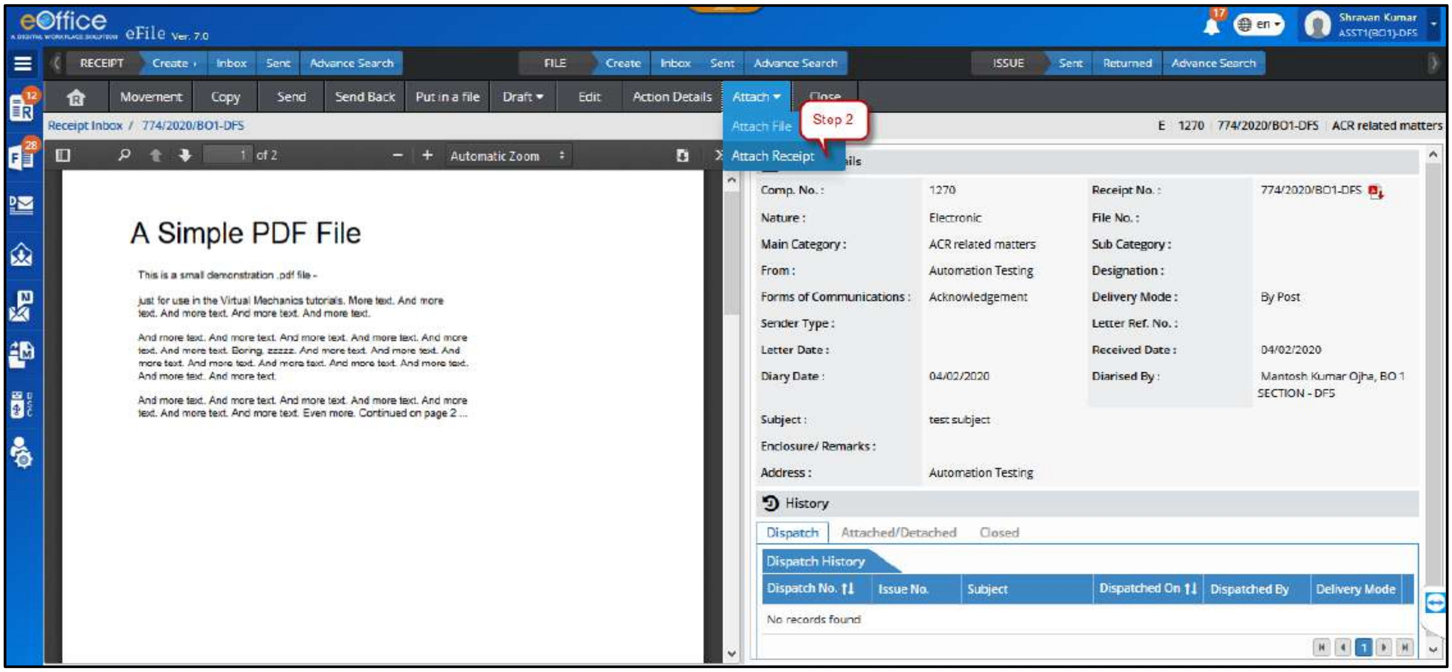



*Figure 53*

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

# Draft Communication

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

## Creating a Draft

**Important Points:**

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

**STEPS TO FOLLOW:**

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

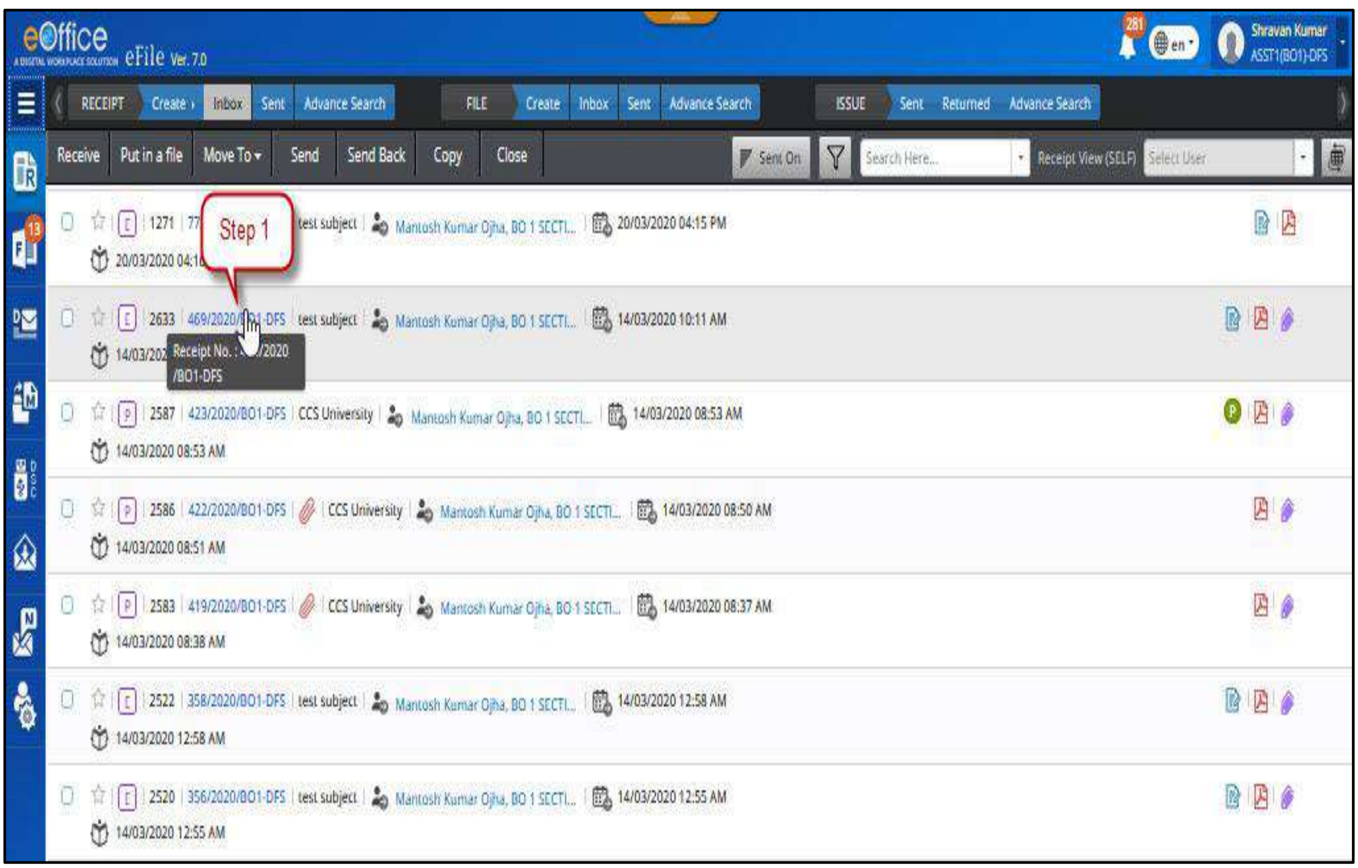



*Figure 54*

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

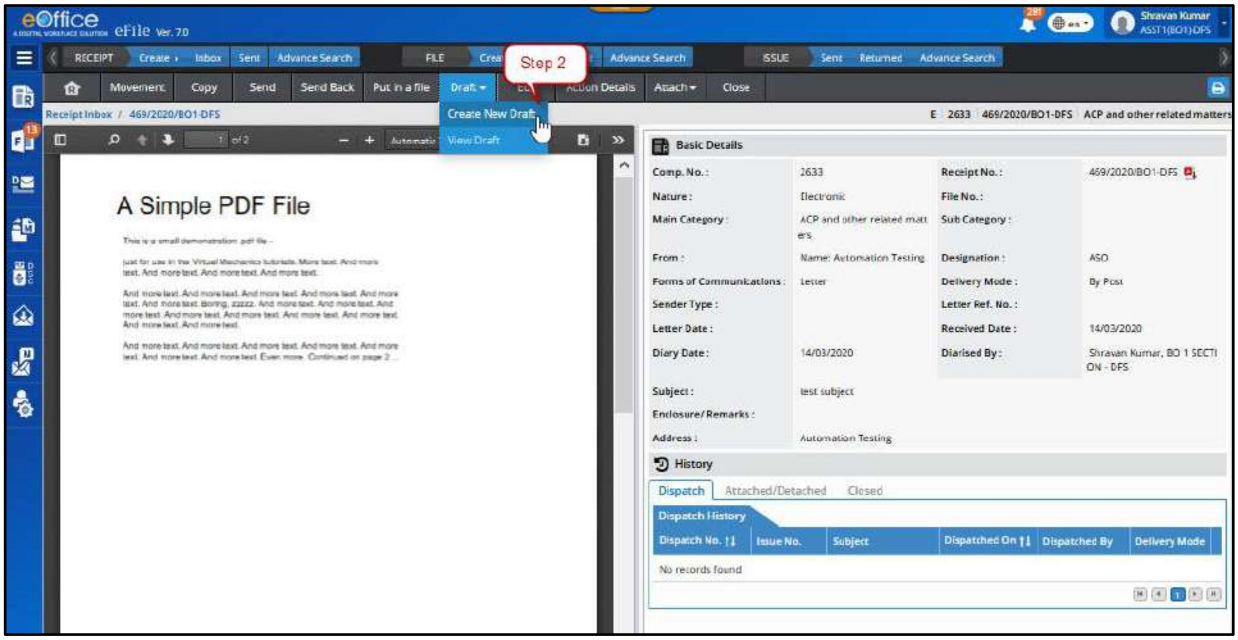



*Figure 55*

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

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

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

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

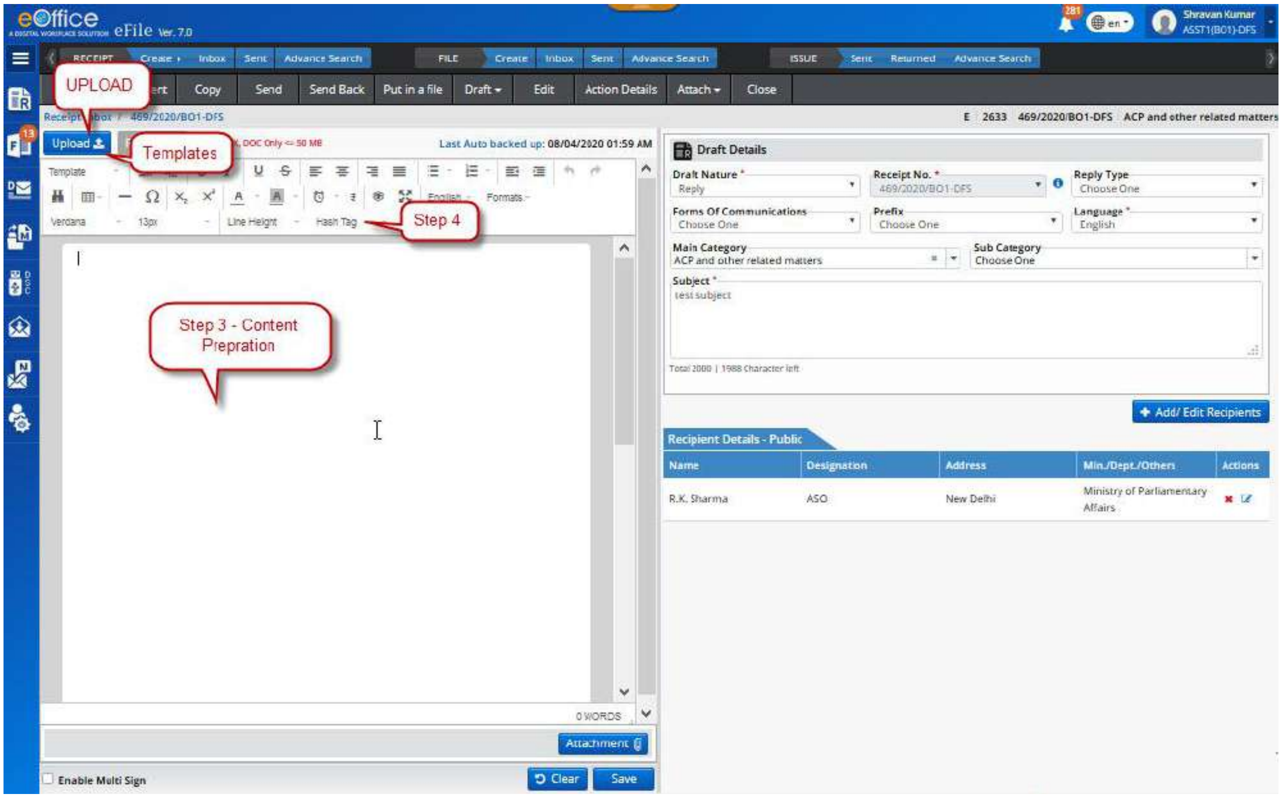



*Figure 56*

**Note:**

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

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

**Note:**

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

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

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

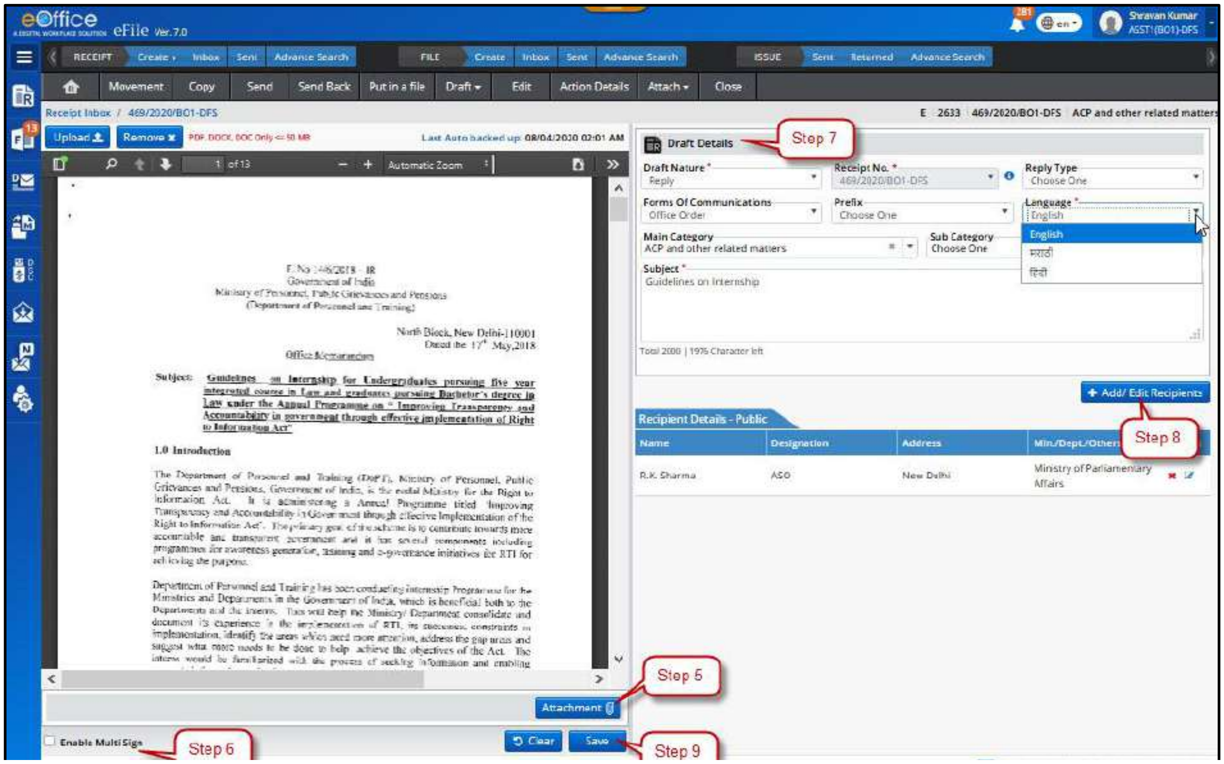



*Figure 57*

**Note:**

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

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

**Note:**

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

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

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

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

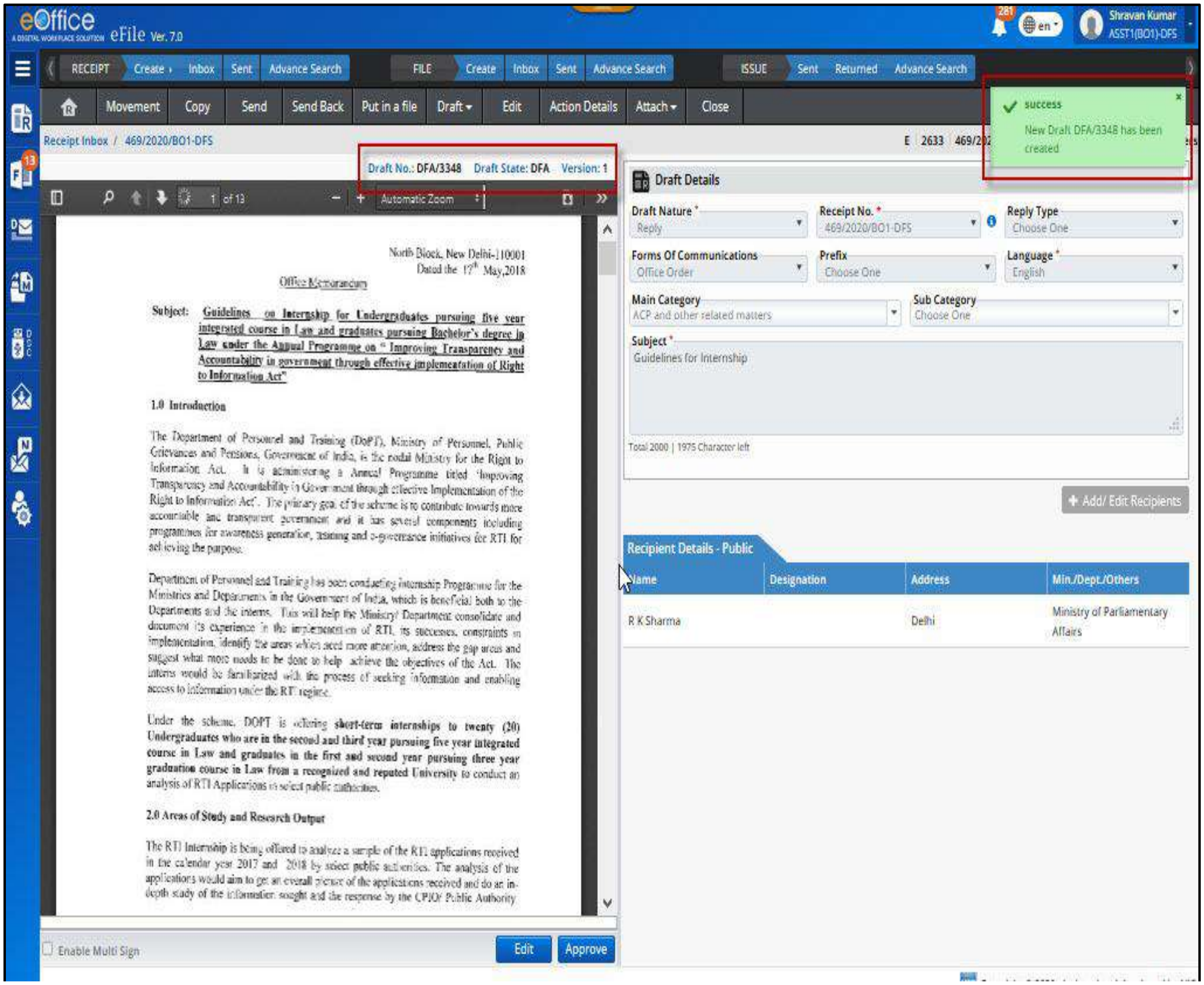



*Figure 58*

**Note:**

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

# List of Drafts

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

## STEPS TO FOLLOW:

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

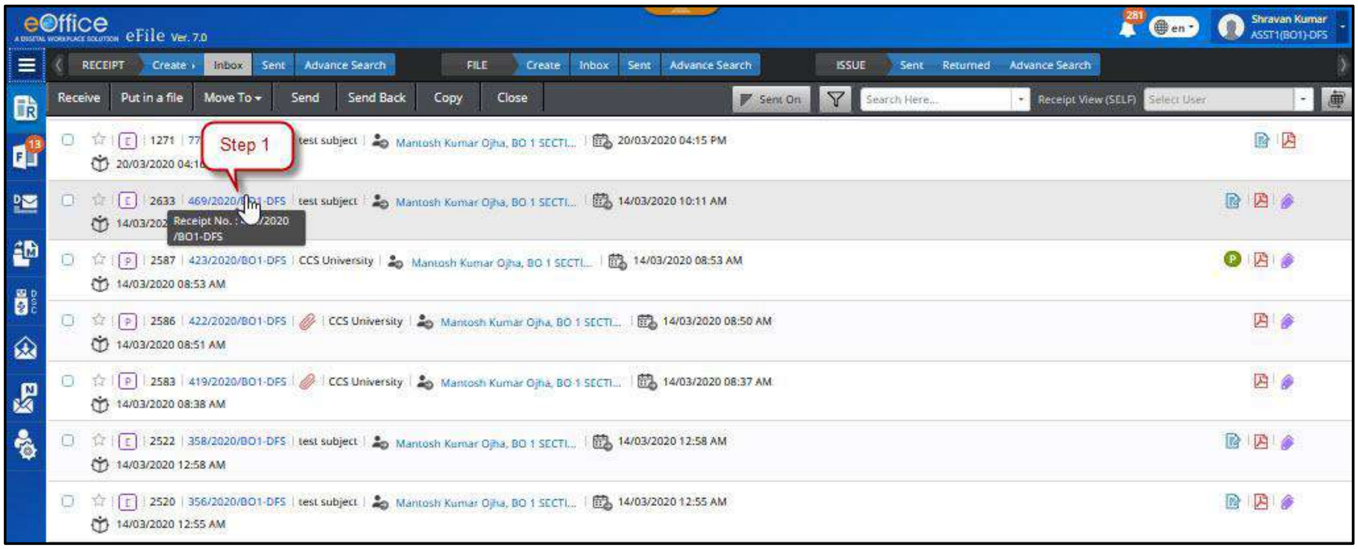



*Figure 59*

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

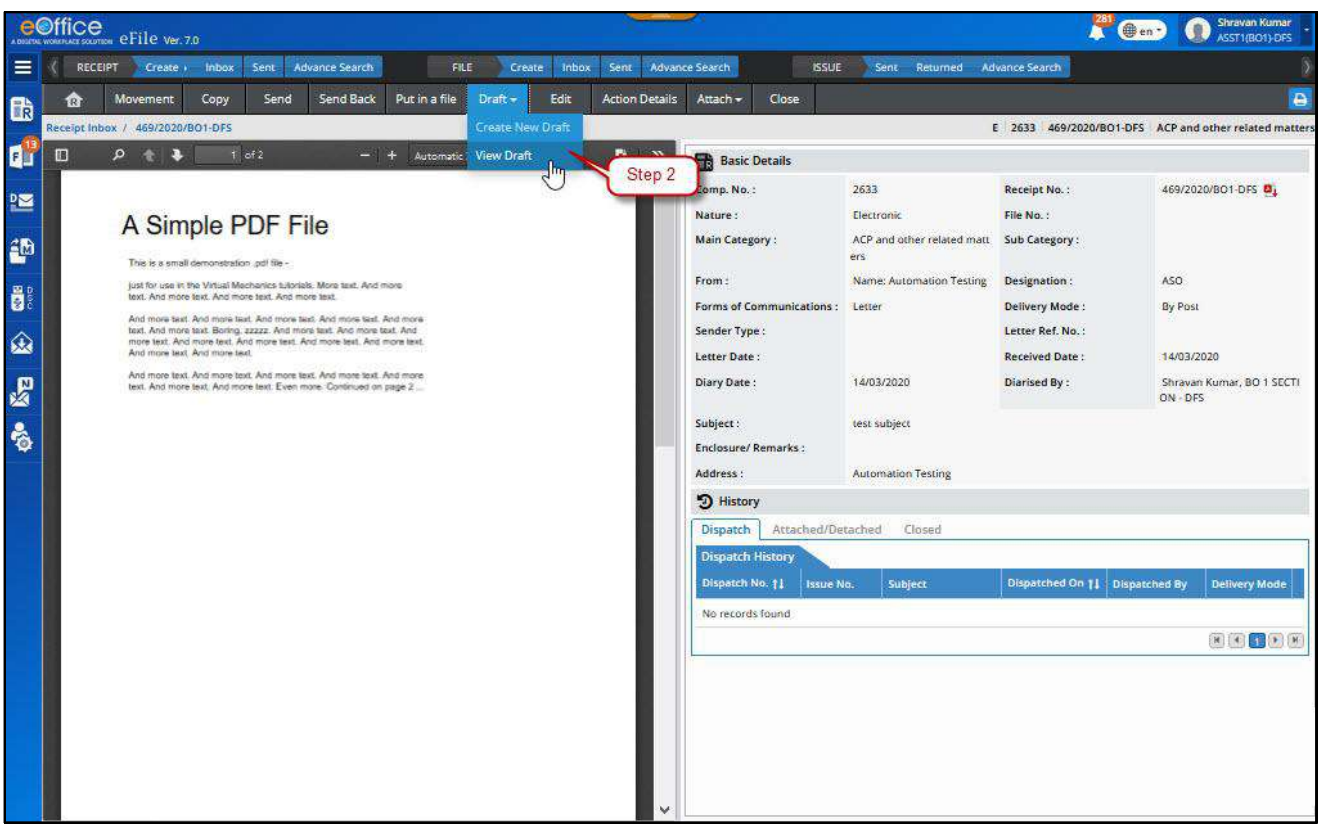
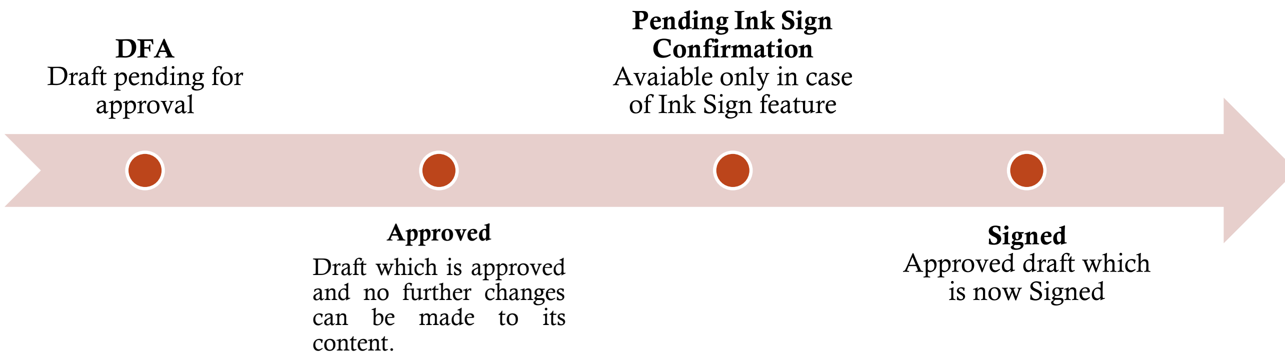



*Figure 60*

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

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




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

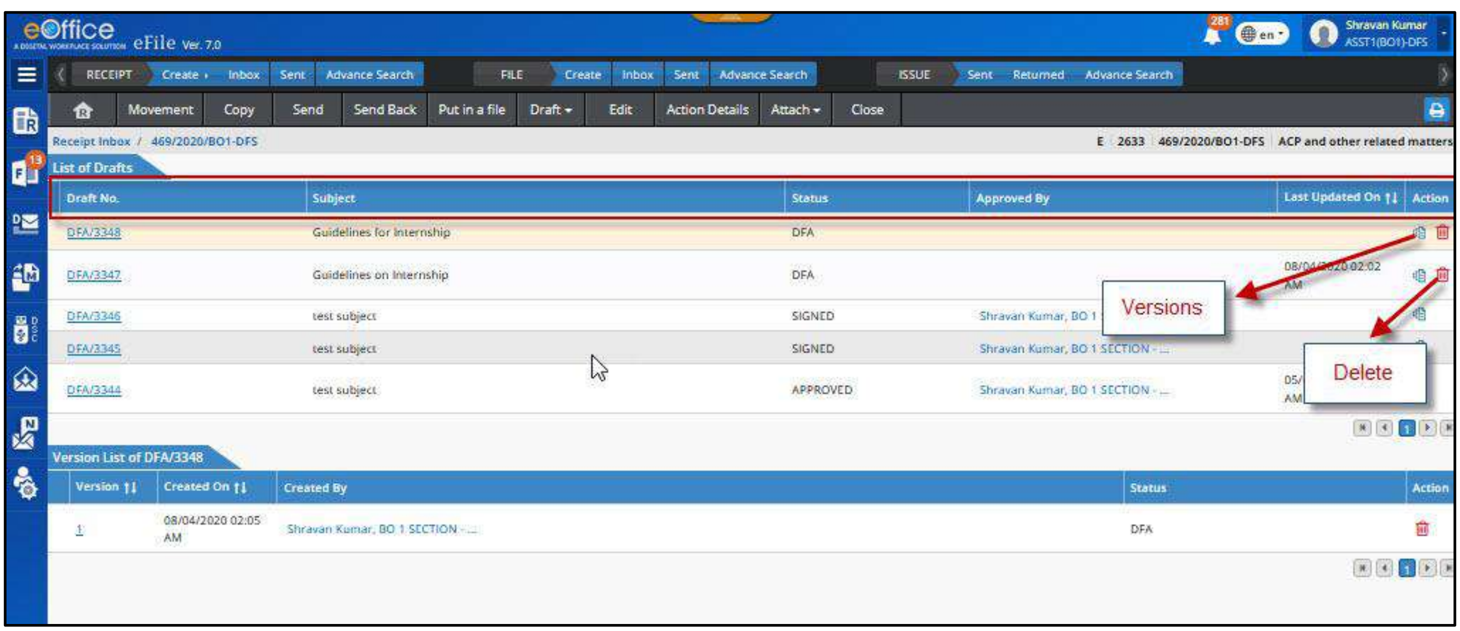



*Figure 61*

**Note:**

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

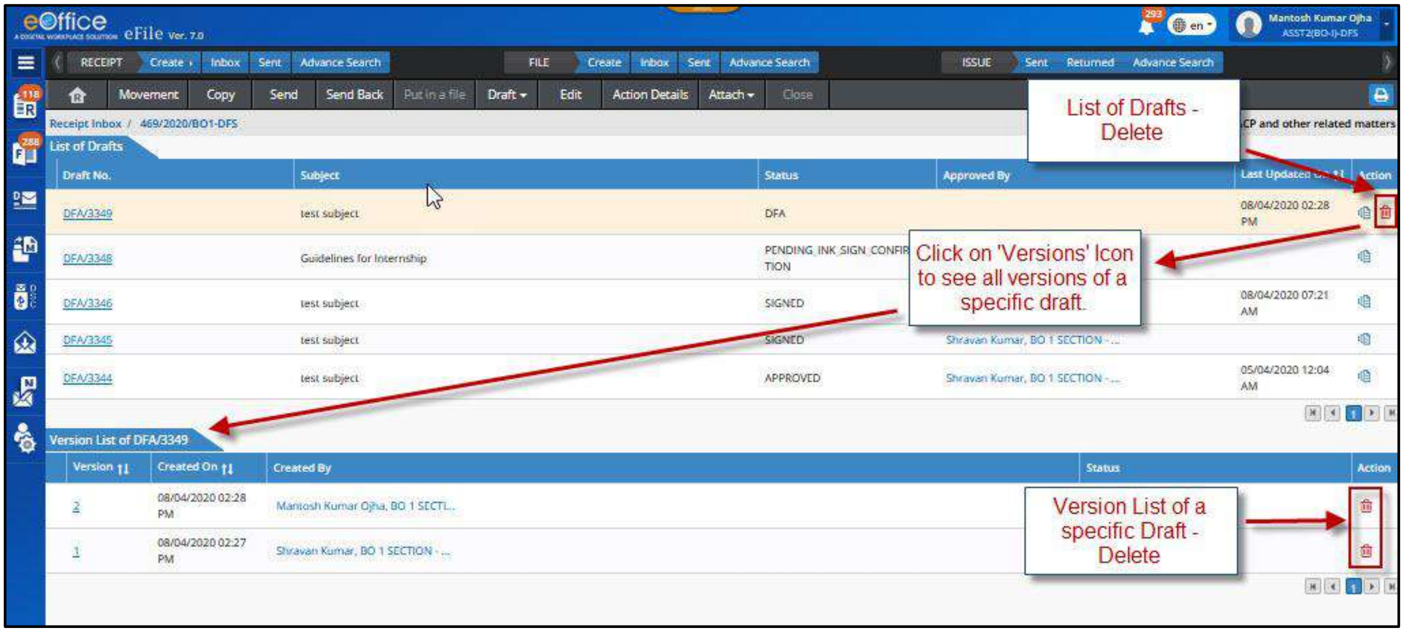



*Figure 62*

**Various cases of 'Delete' Draft Explained –**

1. <u>**Delete Option under List of drafts**</u> (*refer Figure 62*)
   - **a) Receipt without further movement (Single Version)**: Clicking on Delete Icon in draft list will remove the Draft and its version.
   - **b) Receipt with further movement (Single Version)**: Clicking on Delete Icon in draft list will change the Draft and its Version Status to **Deleted** and the Draft No. and Version Link will become 'Inactive'.
   - **c) Receipt without further movement (Multiple Version):** This is the case, when the draft has more than one version and the last version is created by user and did not forward the receipt further. Clicking on 'Delete' Icon in for such draft will remove the latest created version and change the Draft and its other Versions Status to **Deleted** and Draft No. and Version Link should become 'Inactive'.
   - **d) Receipt with further movement (Multiple Version):** This is the case, when the draft has more than one version and the last version was created by some other user. Clicking on 'Delete Icon' in draft list will change the Draft and its Version Status to **Deleted** and Draft No. and Version Link will become 'Inactive'.

2. <u>**Delete Option under Versions List of Draft**</u> (*refer Figure 59*)
   - a) **Receipt without further movement (Single Version):** Clicking on Delete icon in version list of draft will remove version and draft associated with it.
   - b) **Receipt without further movement (Multiple Version):** Clicking on **Delete** icon in version list, will remove latest version (if created by self) of draft.

# Editing Draft in an Electronic Receipt

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

## Important Points:

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

## STEPS TO FOLLOW:

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

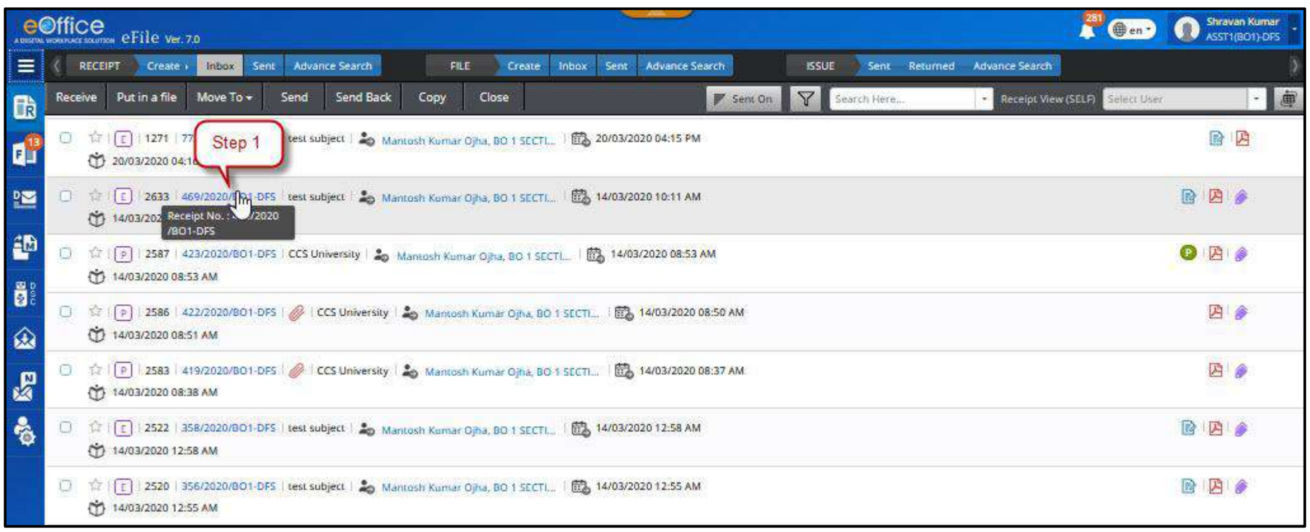



*Figure 63*

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

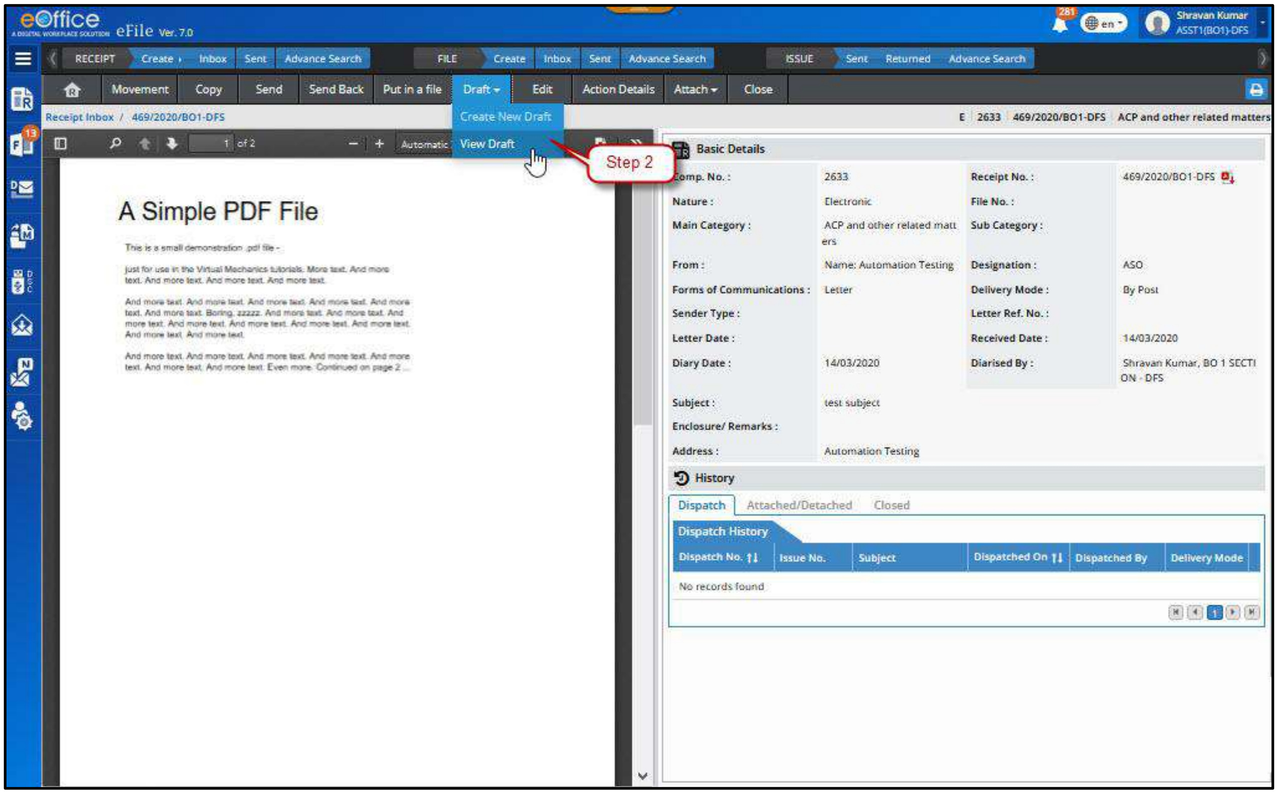



*Figure 64*

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

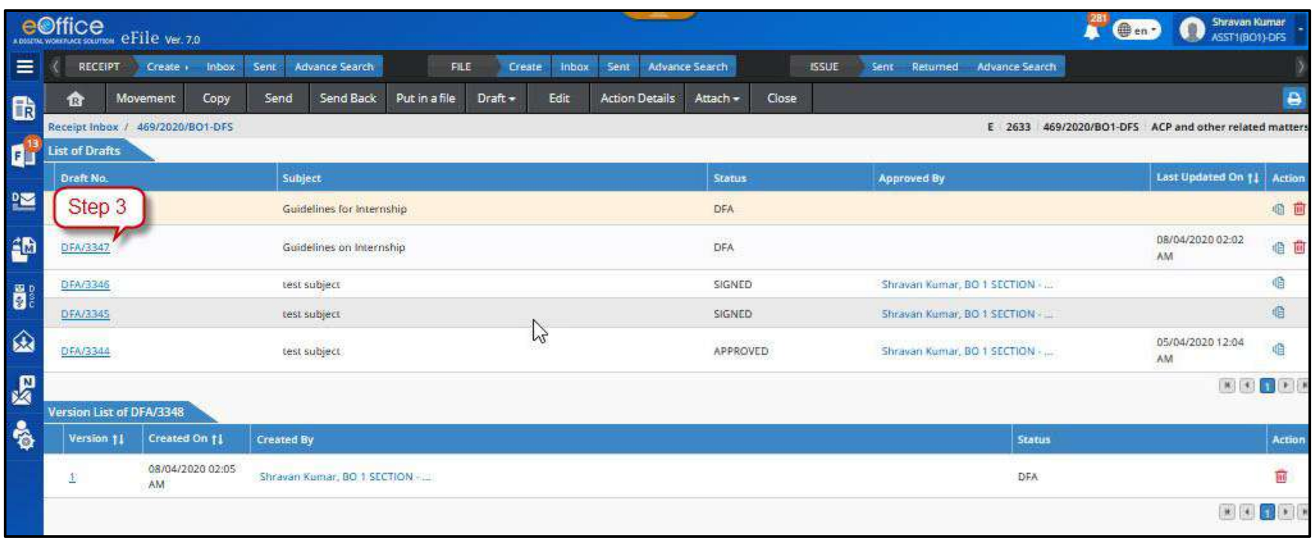



*Figure 65*

4. Click **Edit** Button.

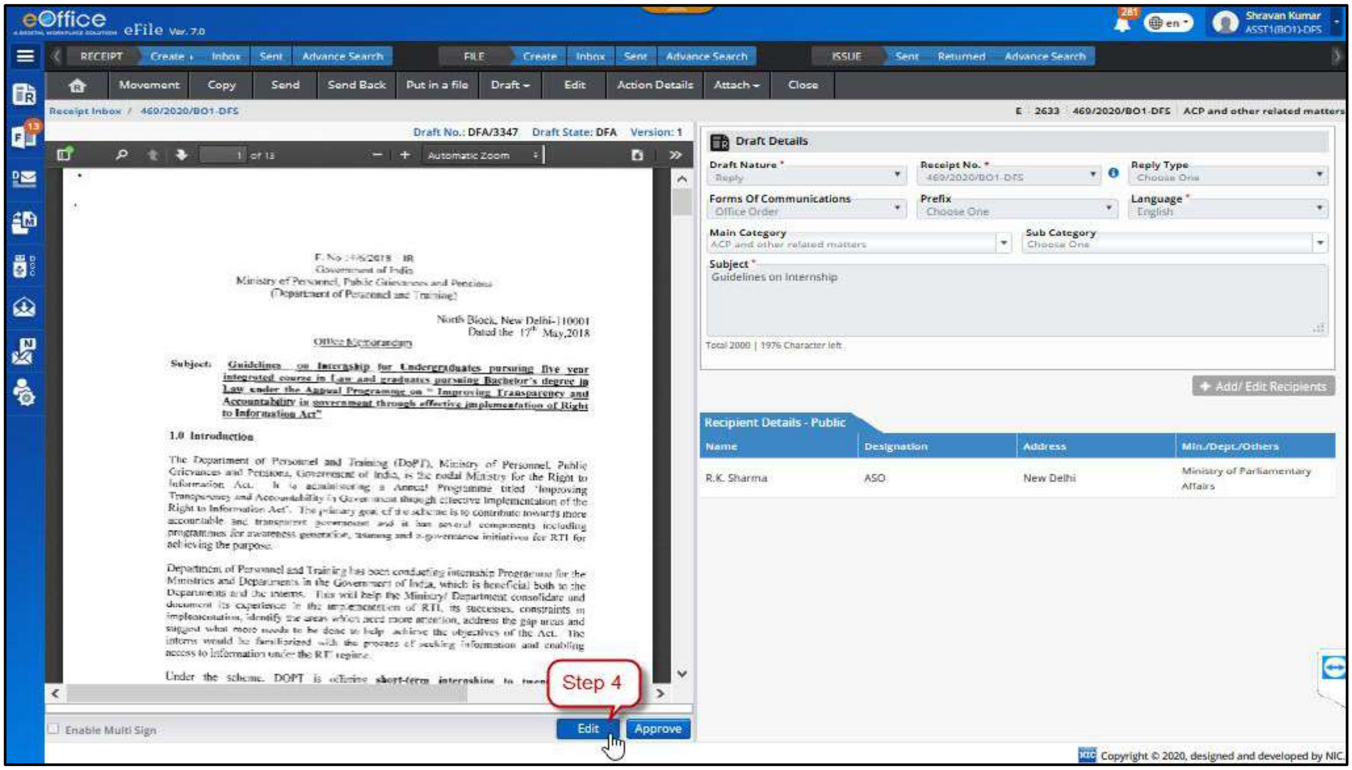



*Figure 66*

## In case content is prepared using online text editor

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

**Or**

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

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

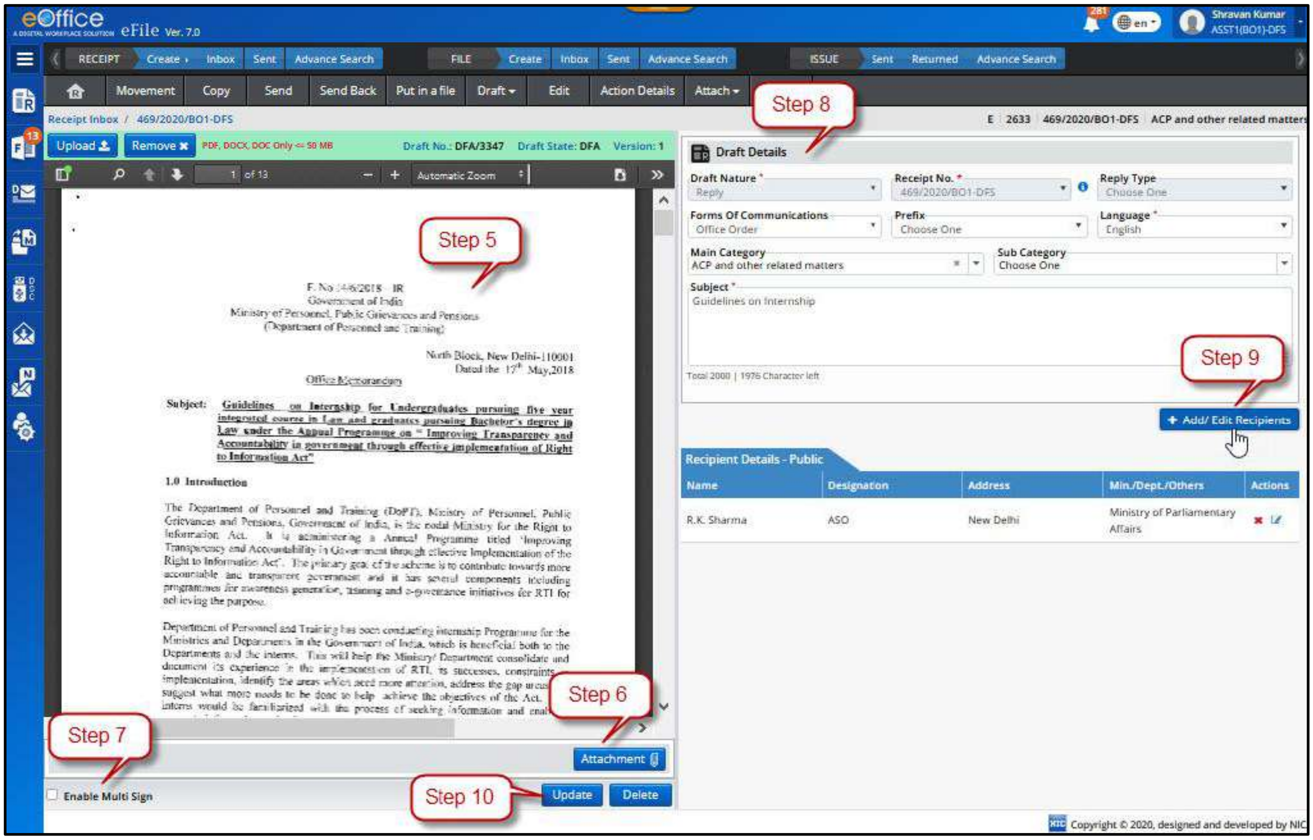



*Figure 67*

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

   Or

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

**Note:**

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

# Add/Edit Recipient

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

## STEPS TO FOLLOW:

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

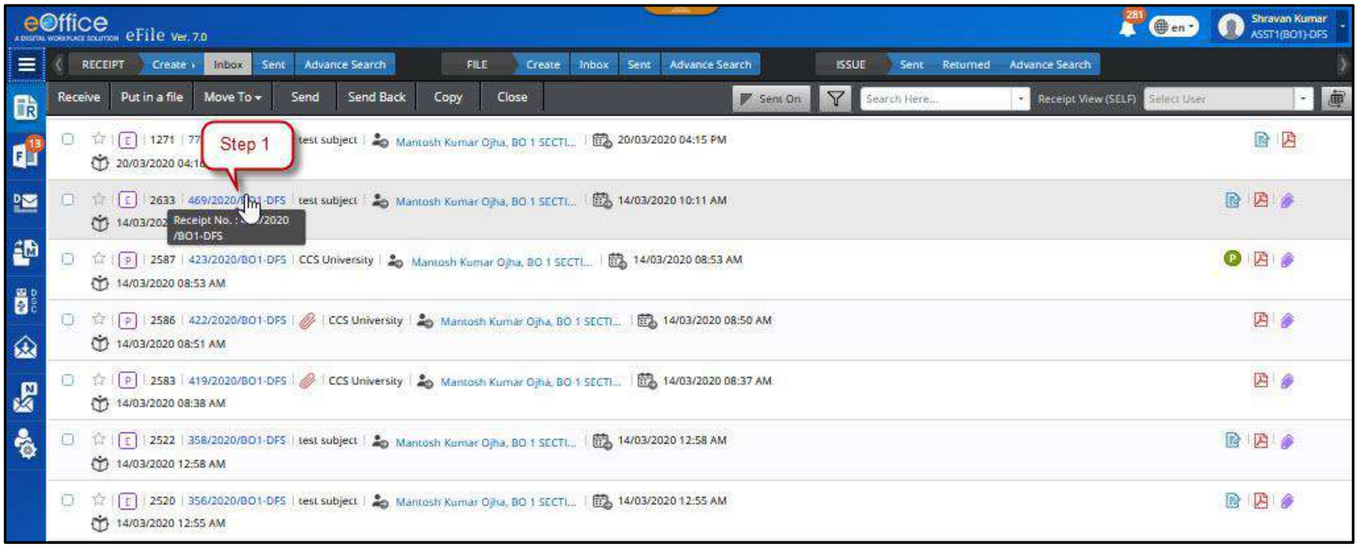



*Figure 68*

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

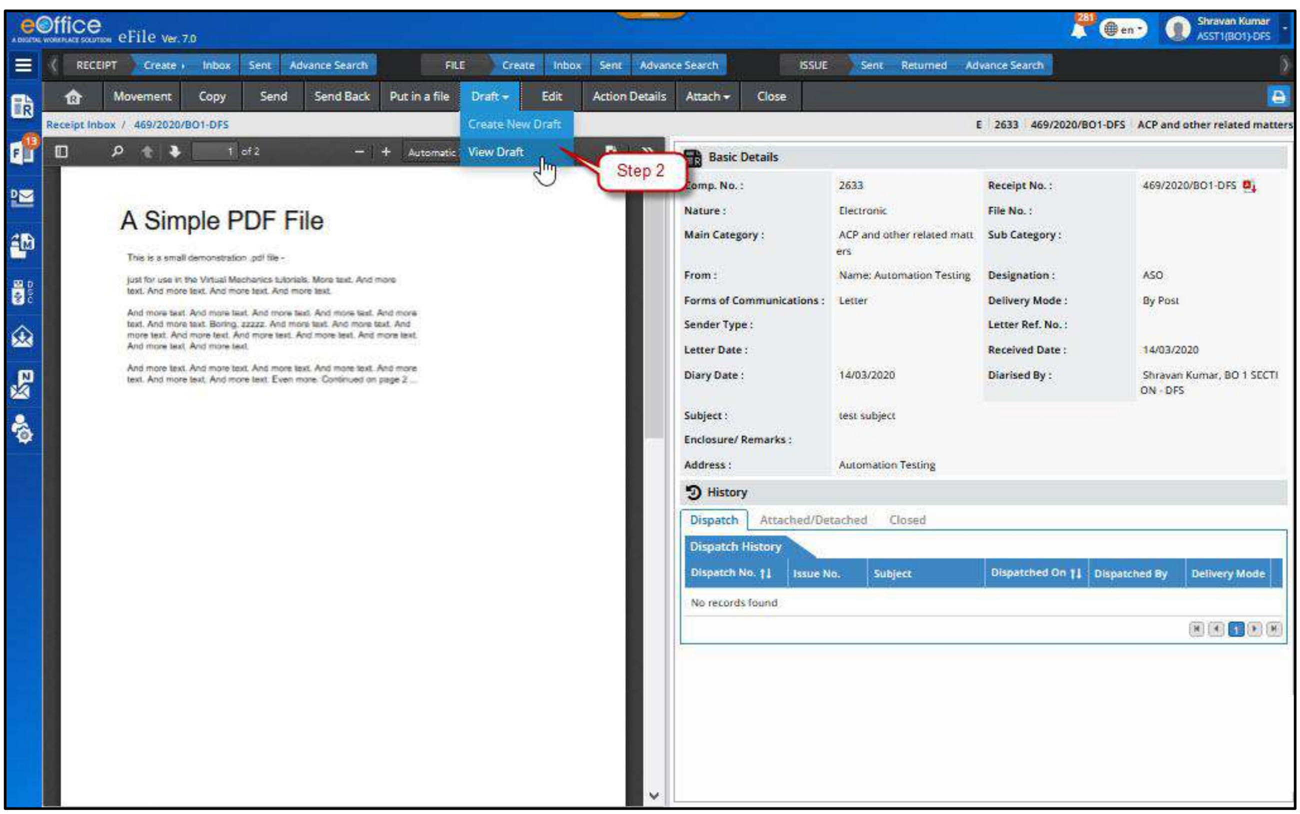



*Figure 69*

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

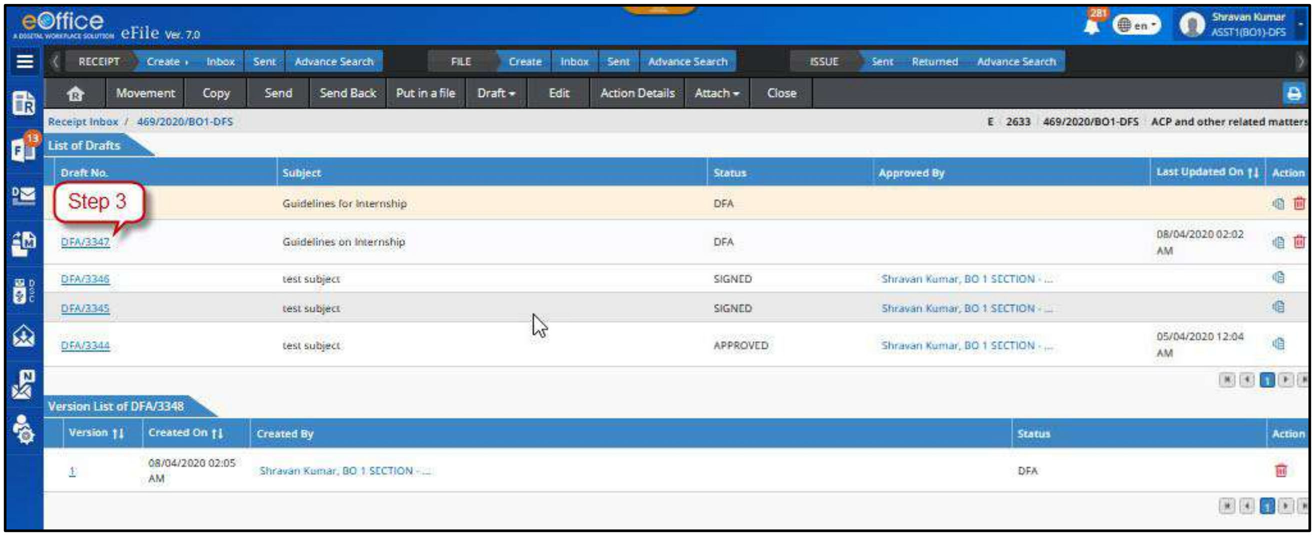



*Figure 70*

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

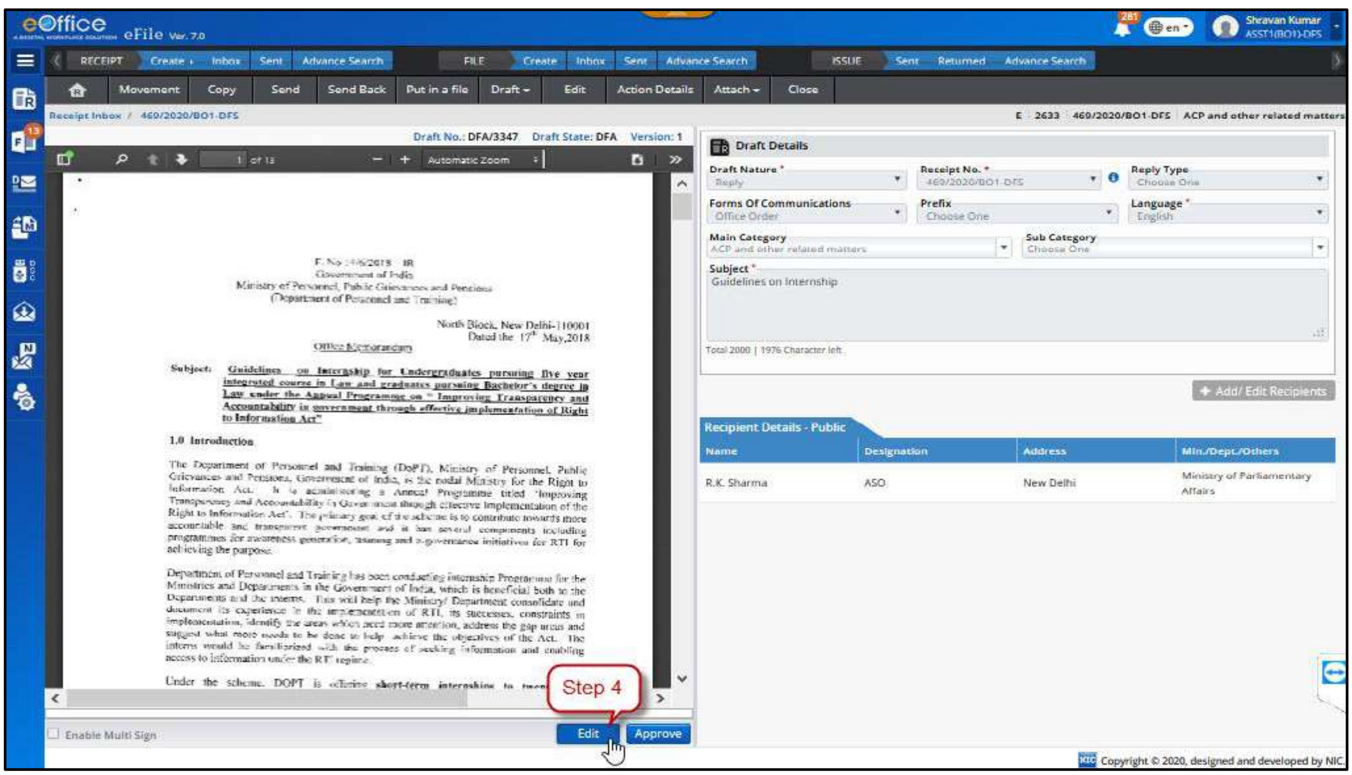



*Figure 71*

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

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

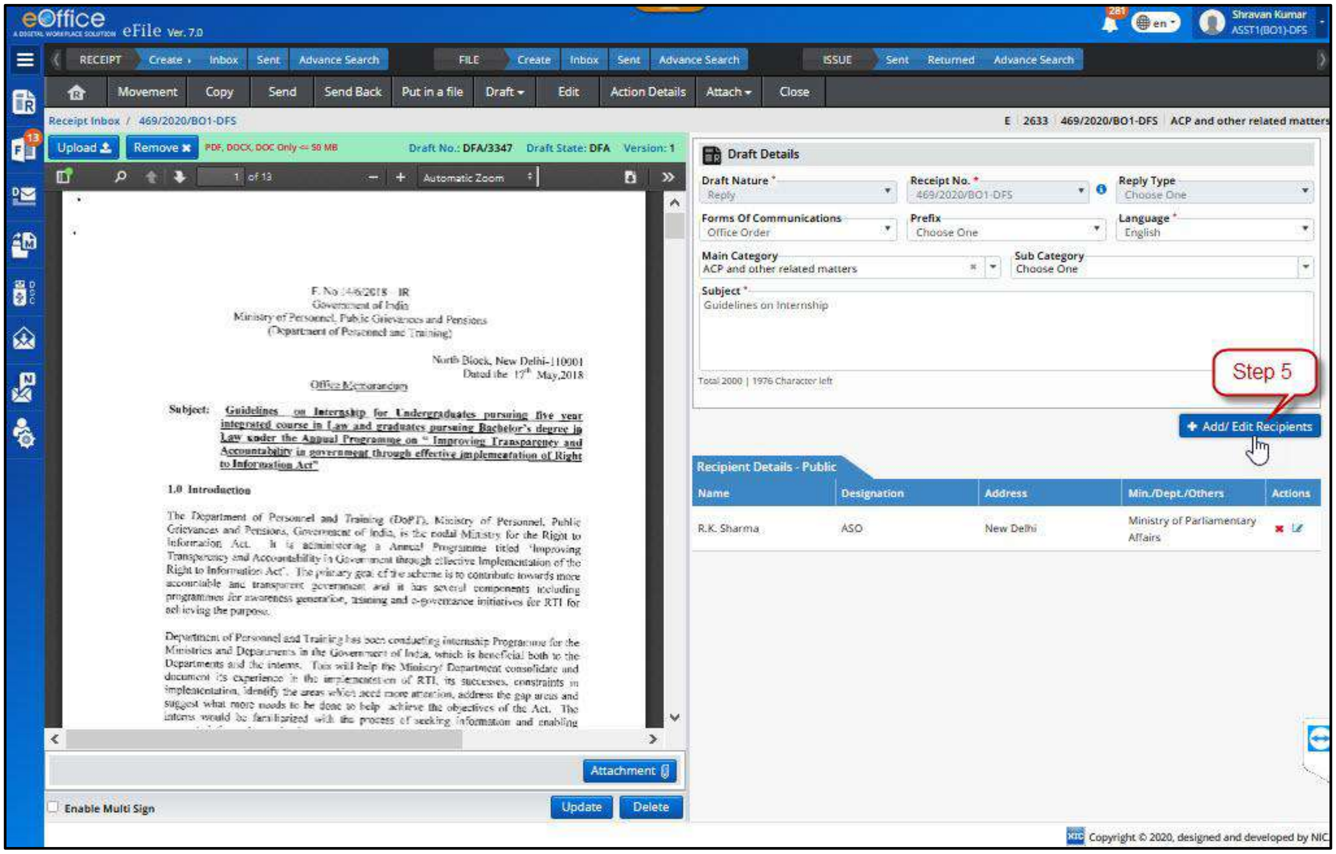



*Figure 72*

6. Fill all available details of recipient (including mandatory fields).
   (**Note**: Refer to section below the steps to know more details to add recipients under **'Public'**, **'Intra eOffice'** and **'Inter eOffice / Other Applications'**.)

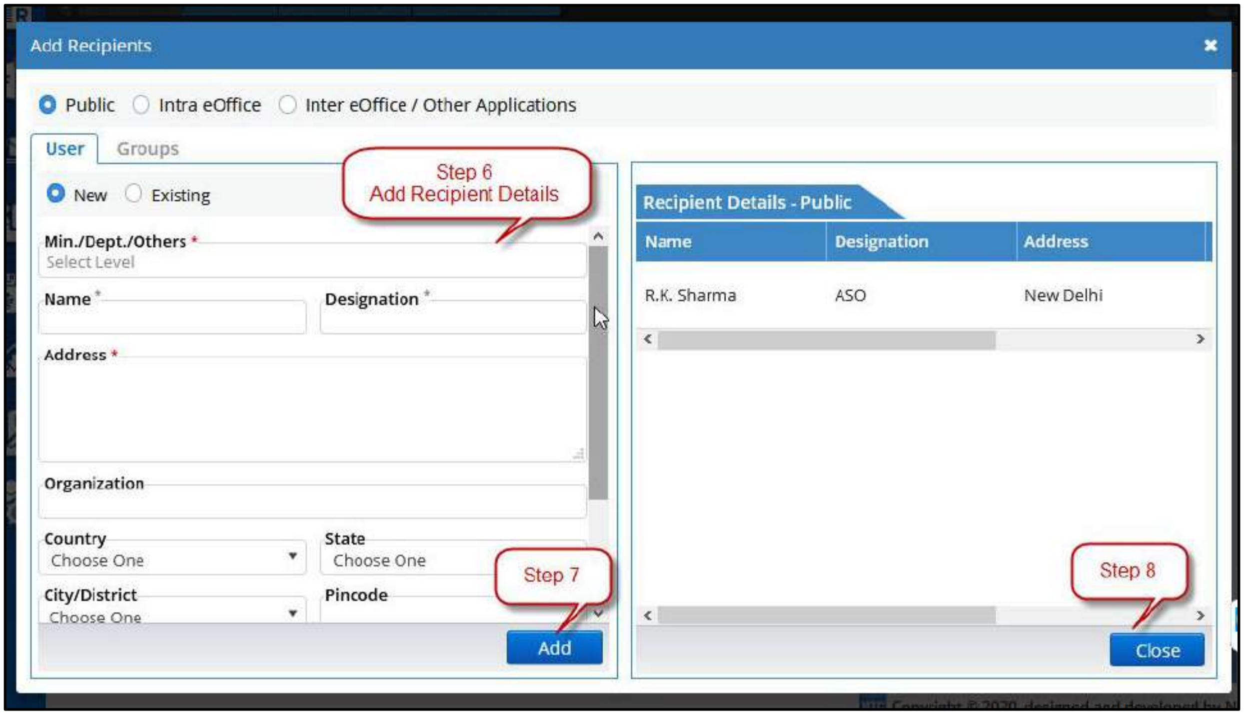



*Figure 73*

7. Click **Add.**

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

## Important Points:

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

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

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

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

## User

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

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

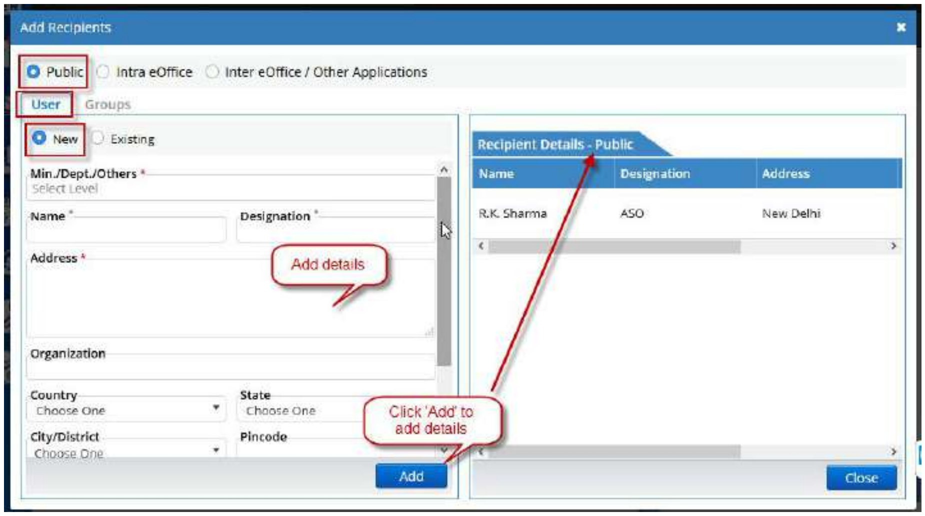



*Figure 74*

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

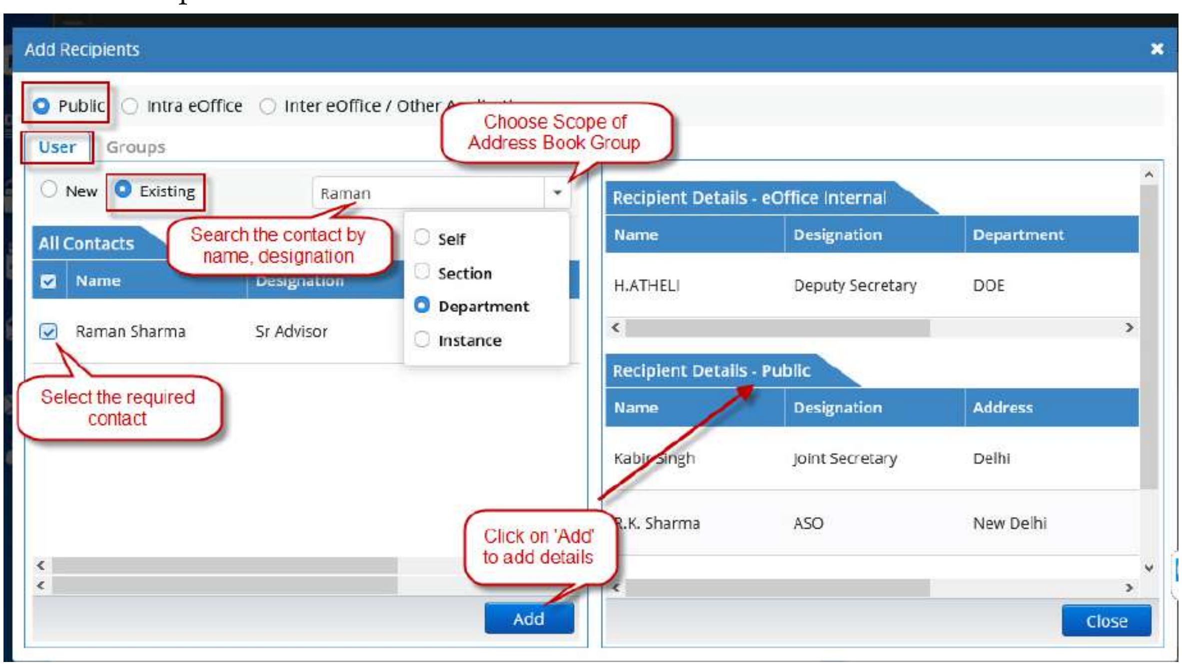



*Figure 75*

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

## Groups

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

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

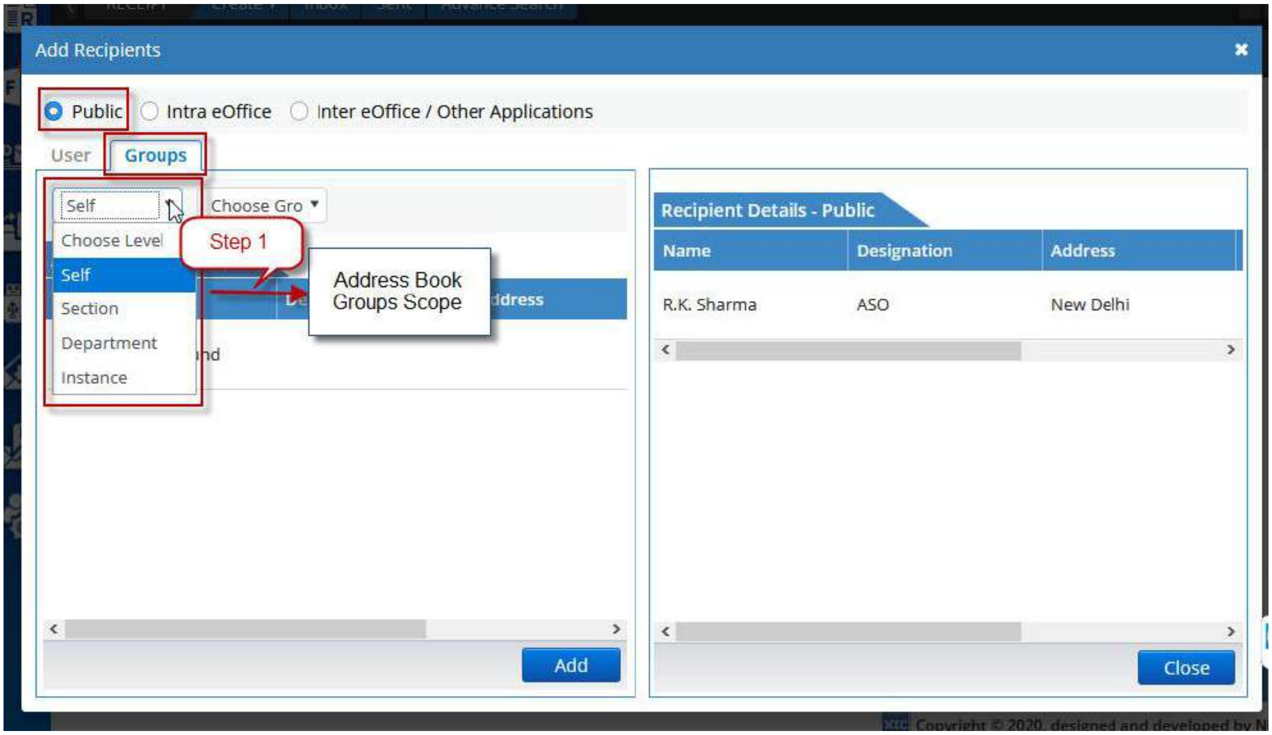



*Figure 76*

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

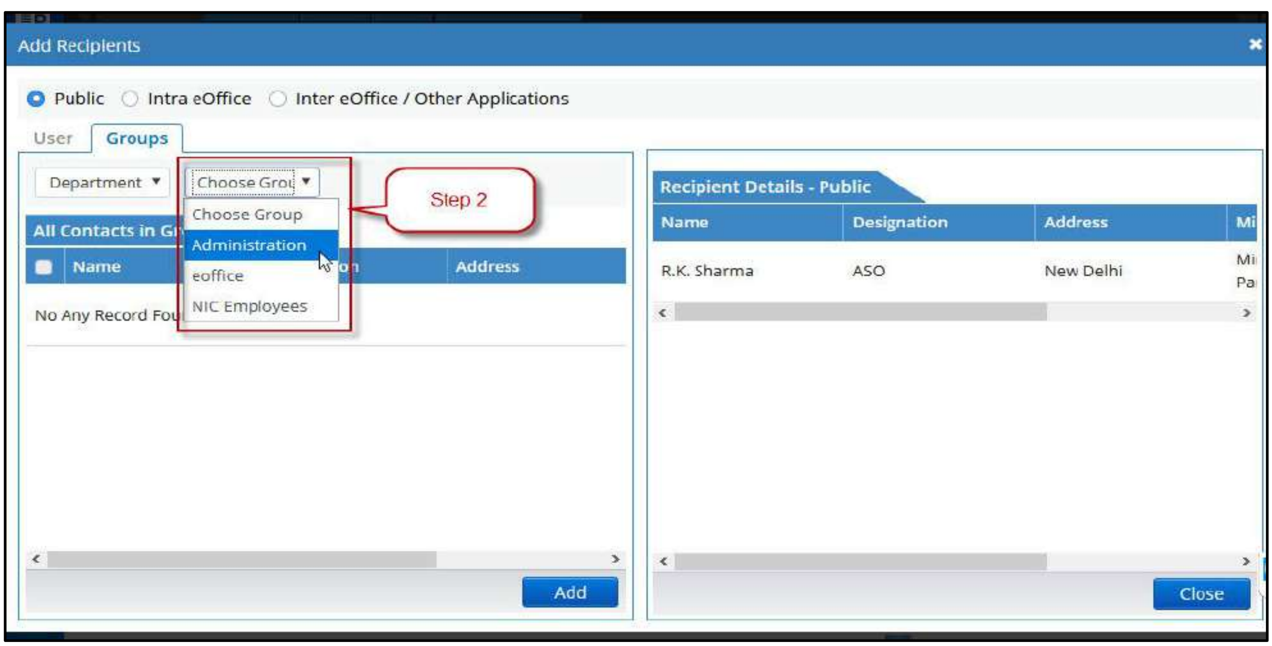



*Figure 77*

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

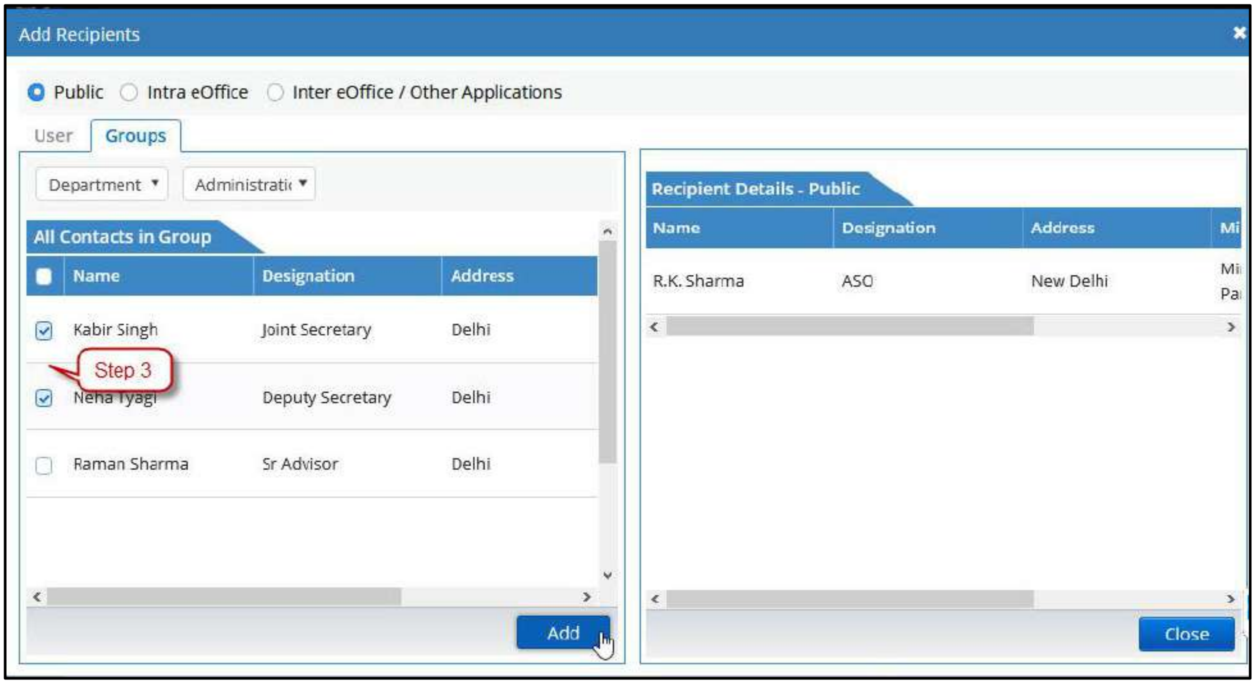



*Figure 78*

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

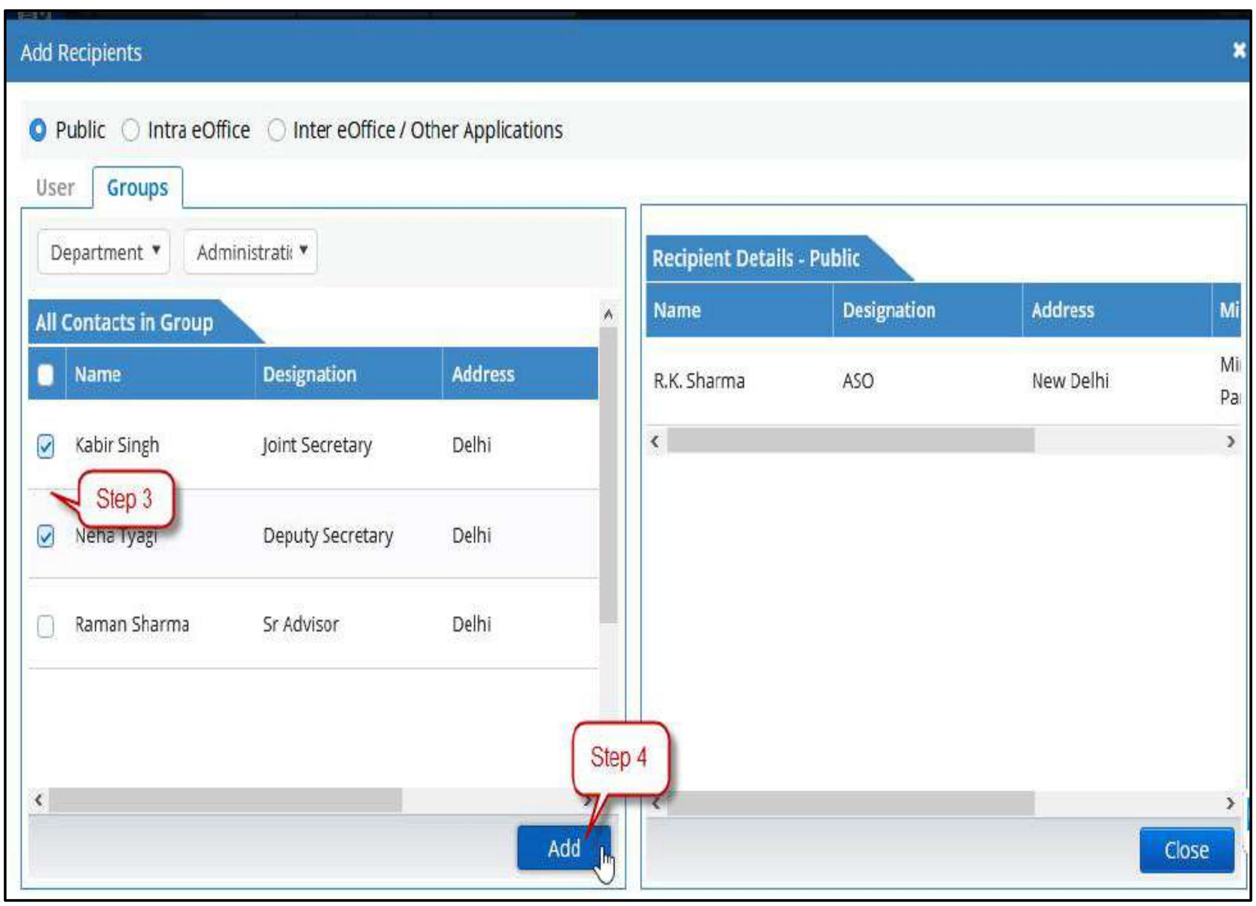



*Figure 79*

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

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

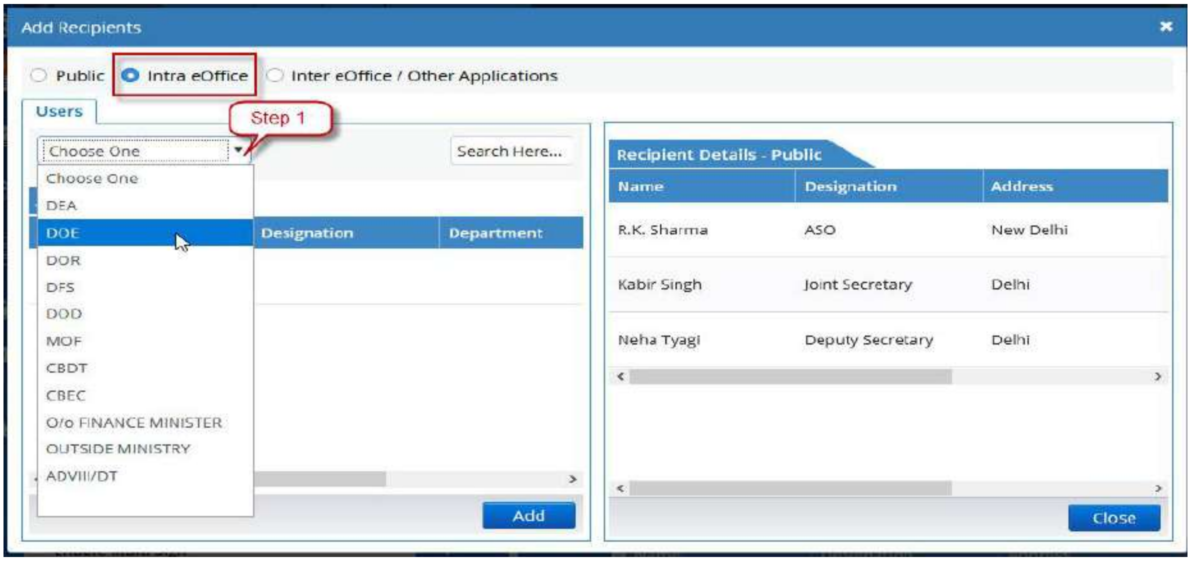



*Figure 80*

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

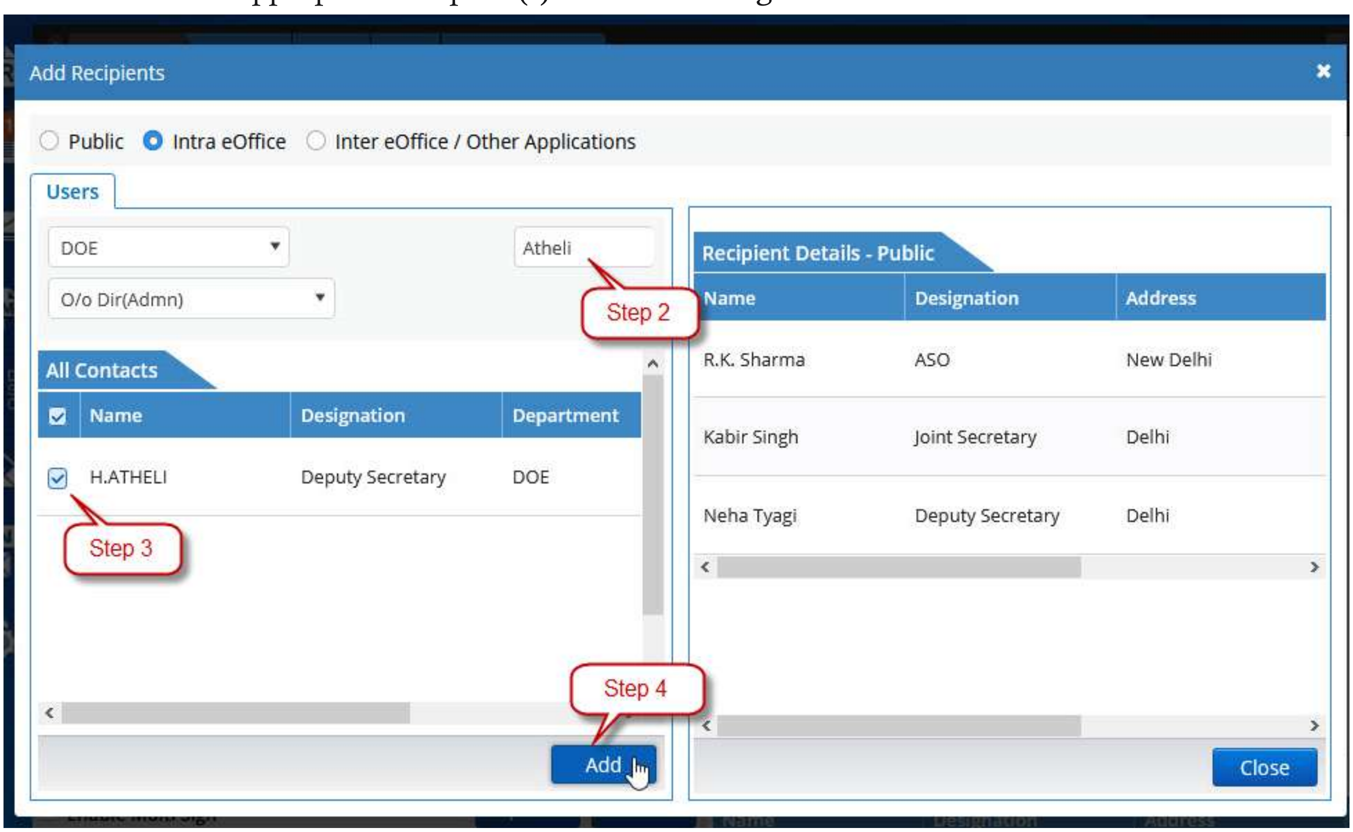



*Figure 81*

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

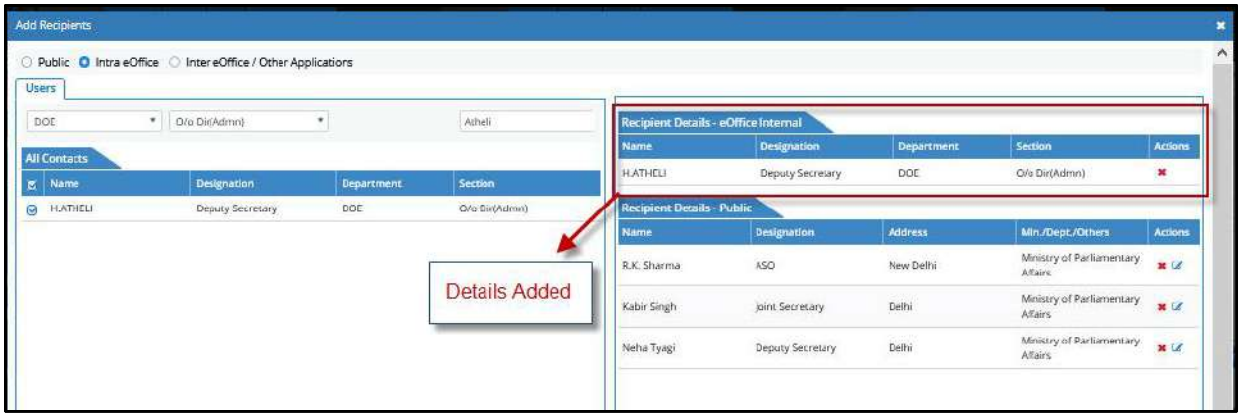



*Figure 82*

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

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

# Approving Draft

This section describes steps to approve a draft.

## Important Points:

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

## STEPS TO FOLLOW:

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

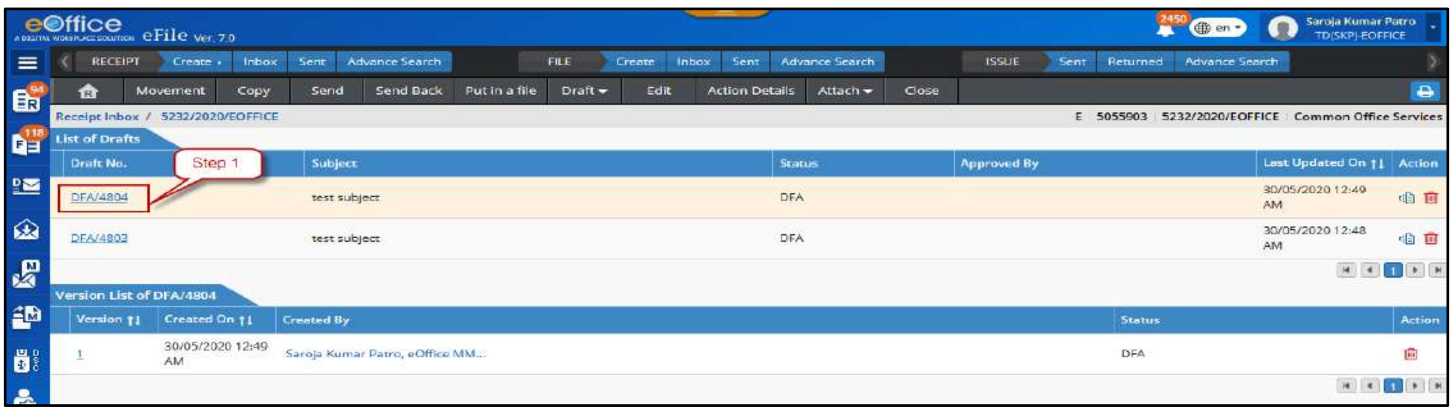



*Figure 83*

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

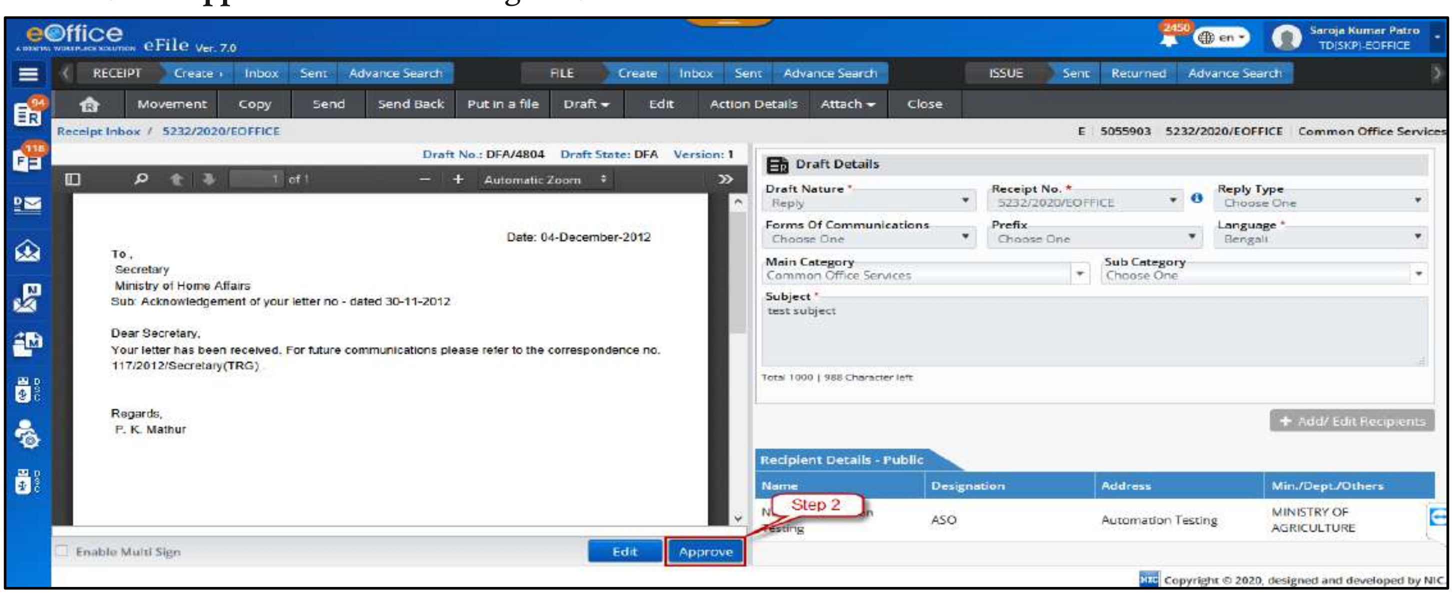



*Figure 84*

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

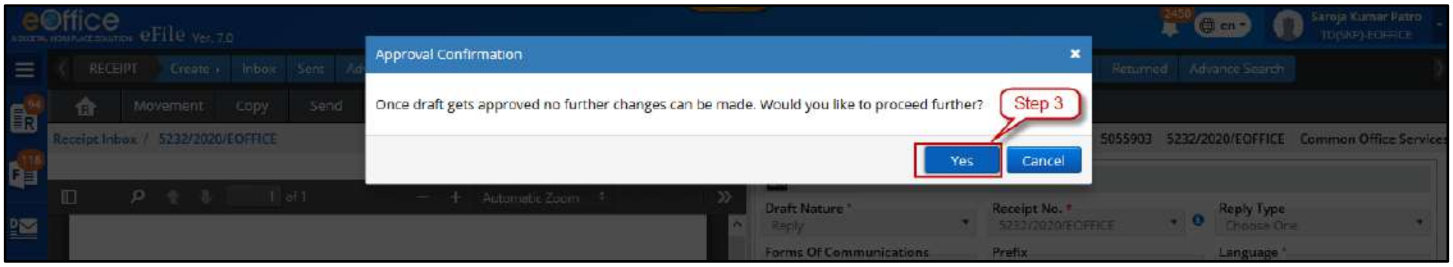



*Figure 85*

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

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

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

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

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

**<Sequence Number>–**The continuous running sequence number

**<Year>–**The year of creation

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

**Note:**

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

# Signing Draft

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

**Important Points:**

- ✓ Only Approved drafts in the Drafts List can be digitally signed.
- ✓ Drafts along with receipts received from other Ministries and organizations cannot be digitally signed.
- ✓ **Multi Sign** – A draft can be signed multiple times if **'Enable Multi Sign'** is checked.
- ✓ A draft enabled with Multi Sign feature cannot be Ink signed.

# DSC SIGN

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

**Important Points:**

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

## STEPS TO FOLLOW:

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

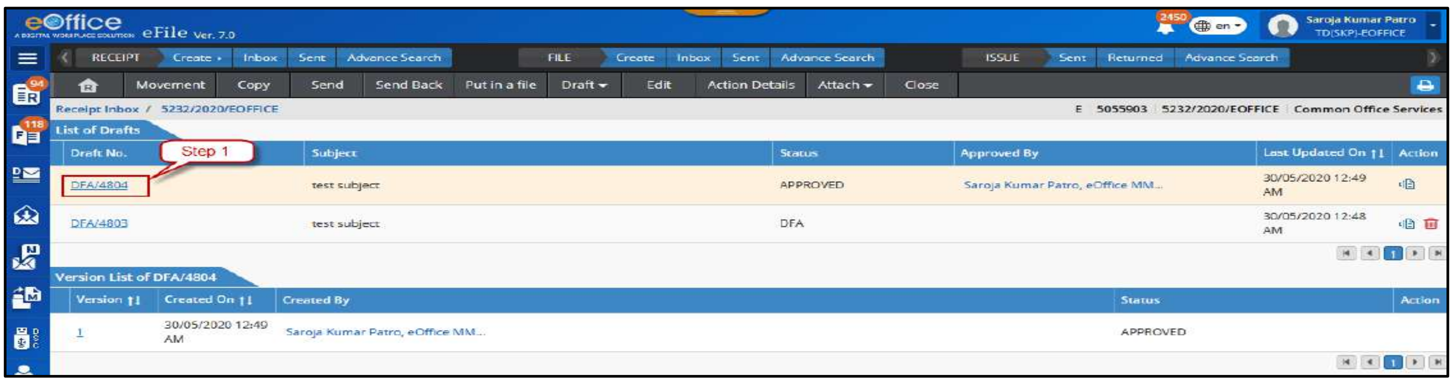


*Figure 86*

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

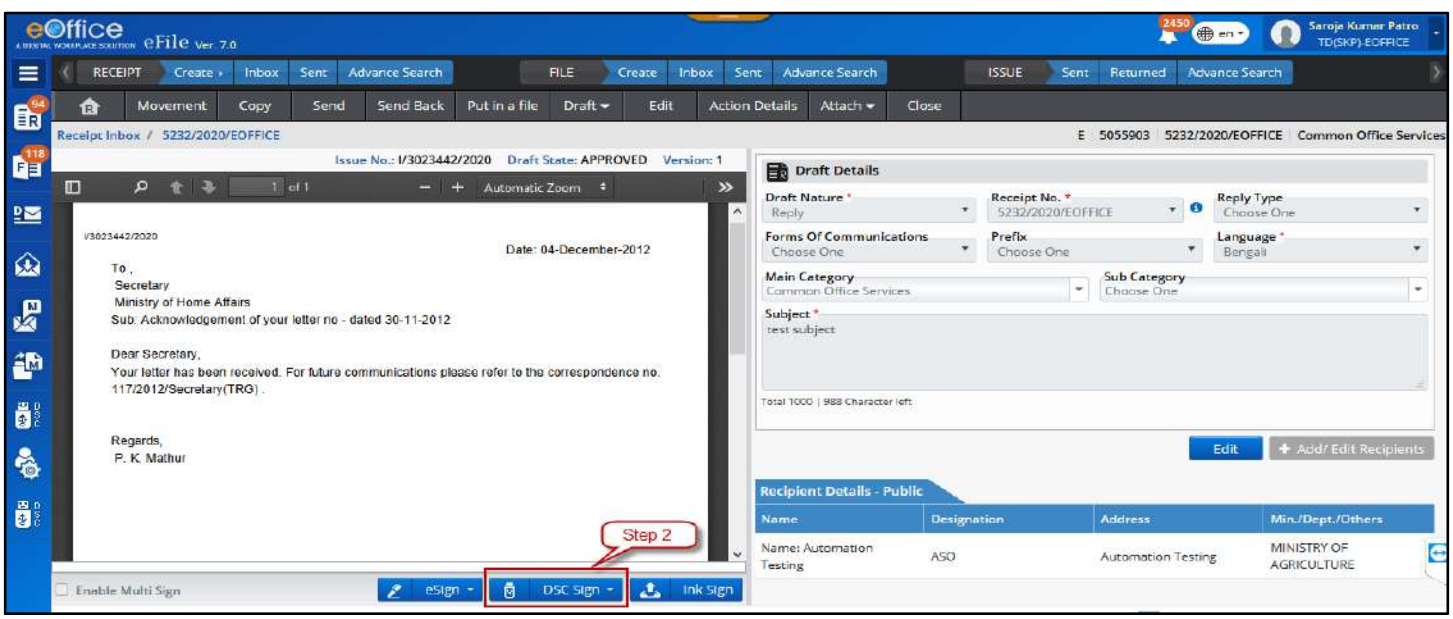


*Figure 87*

## To Sign at default location

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

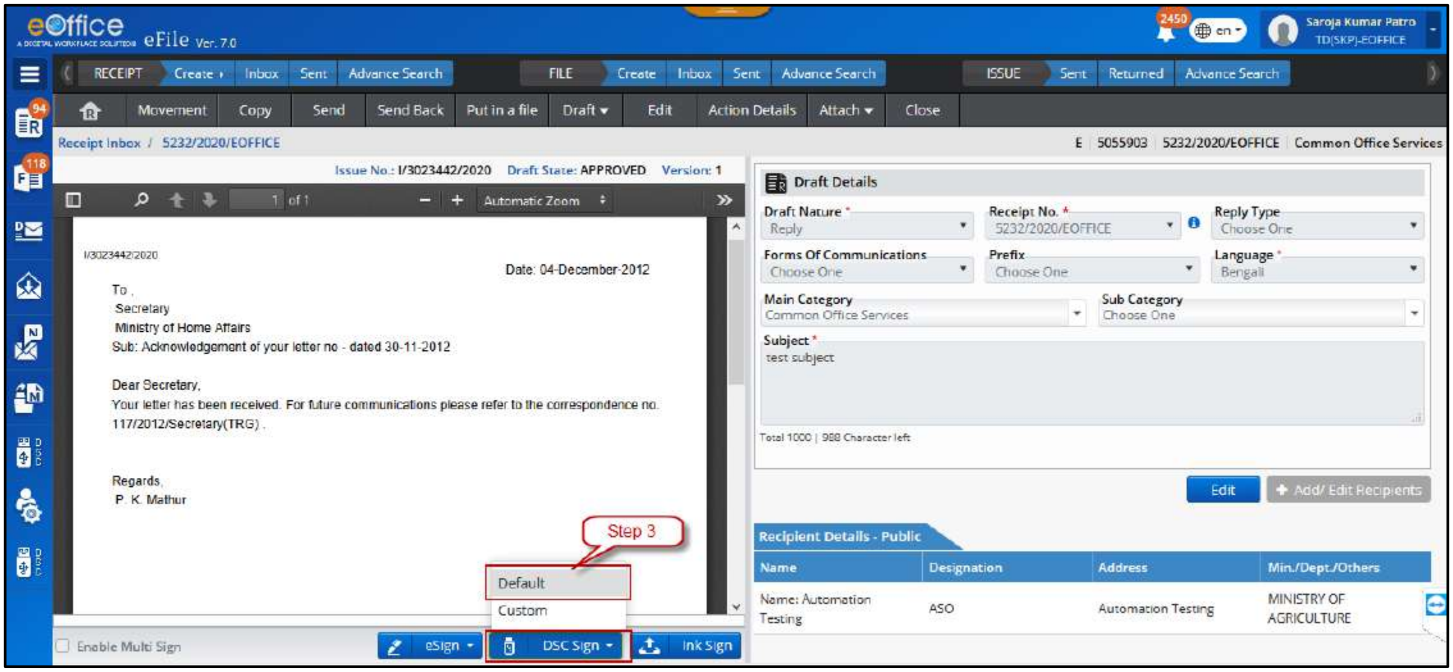



*Figure 88*

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

## To Sign at the location of your choice

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

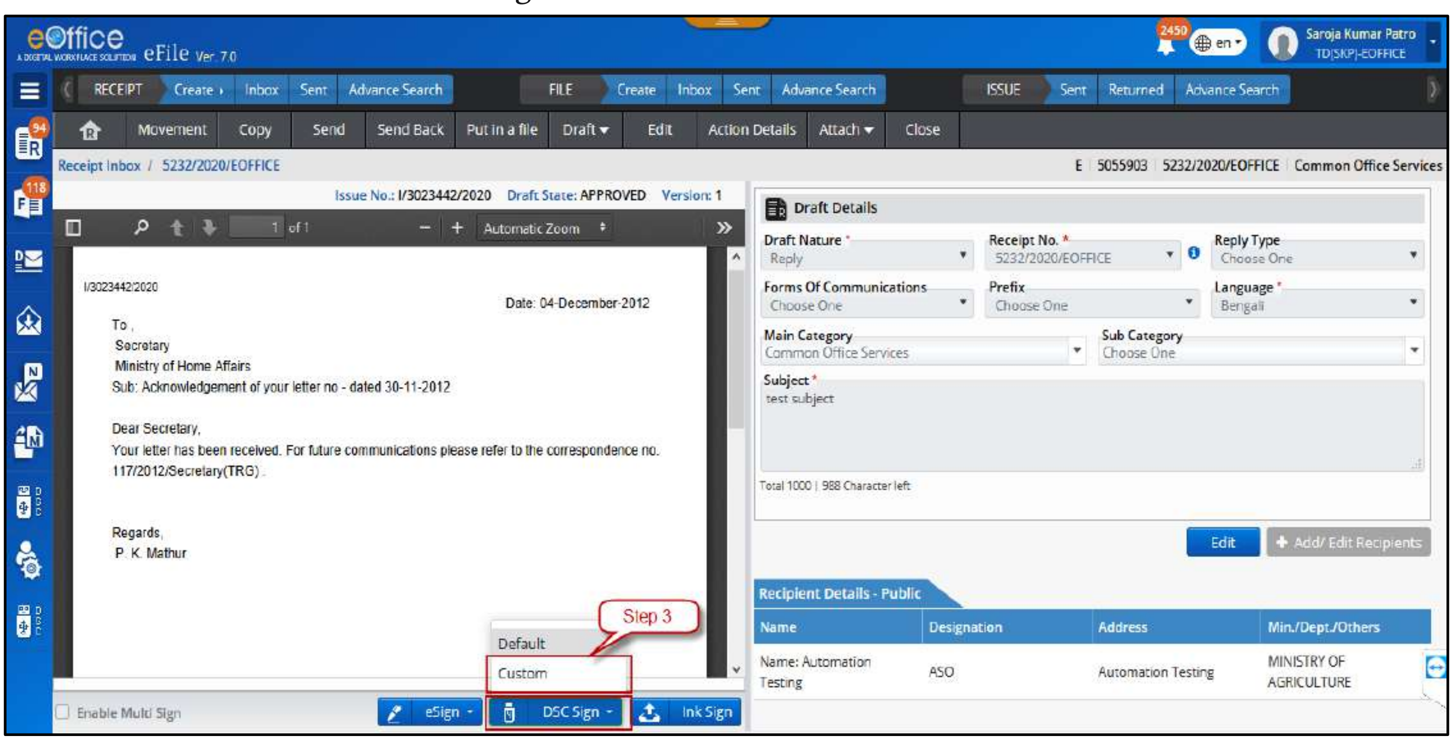



*Figure 89*

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

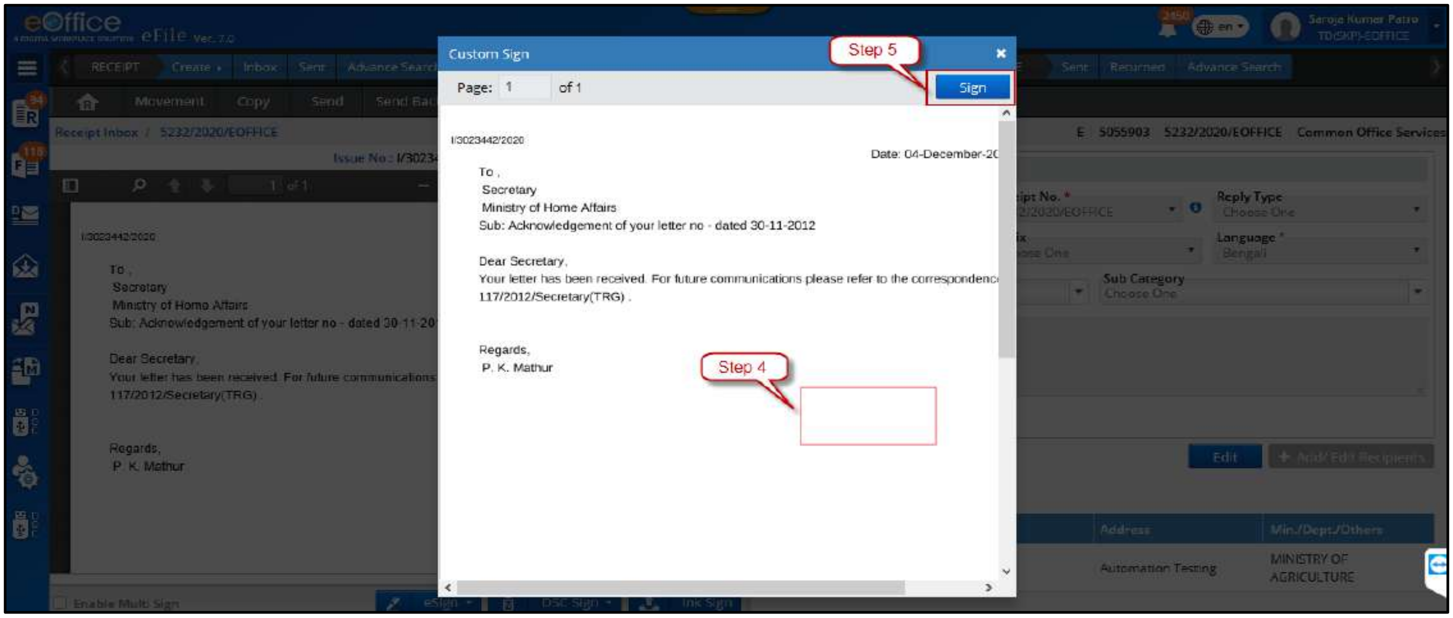



*Figure 90*

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

**Note:**

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

## eSign

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

**Important Points:**

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

# STEPS TO FOLLOW:

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

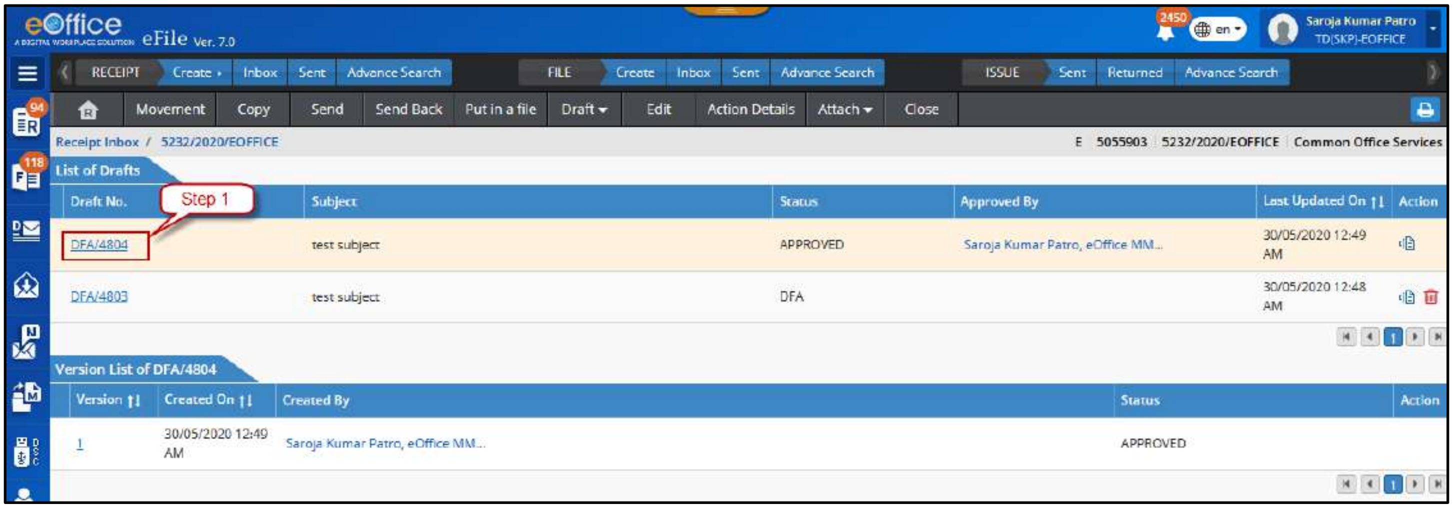



*Figure 91*

2. Click **'eSign'** button.

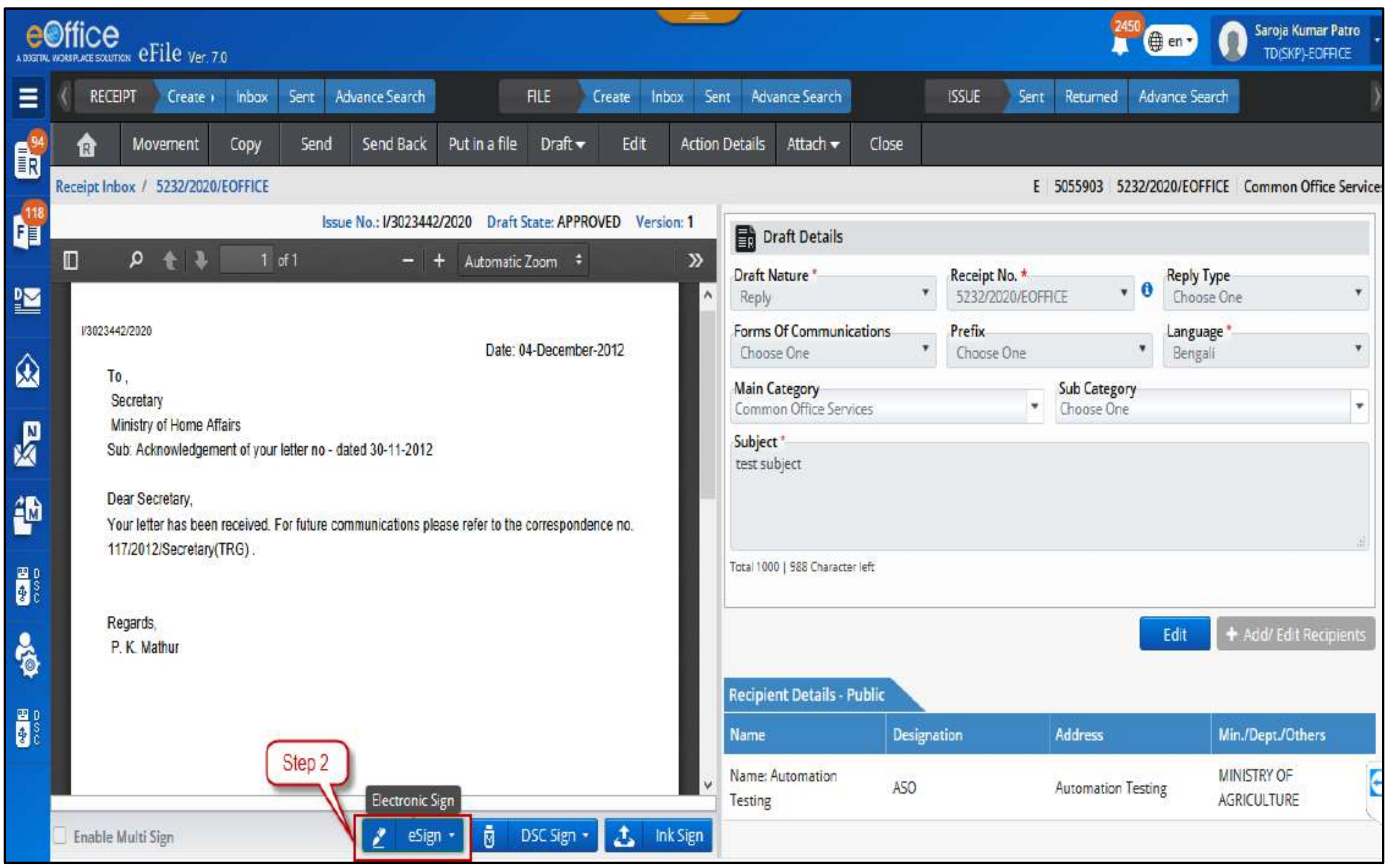



*Figure 92*

## To Sign with OTP method at default location

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

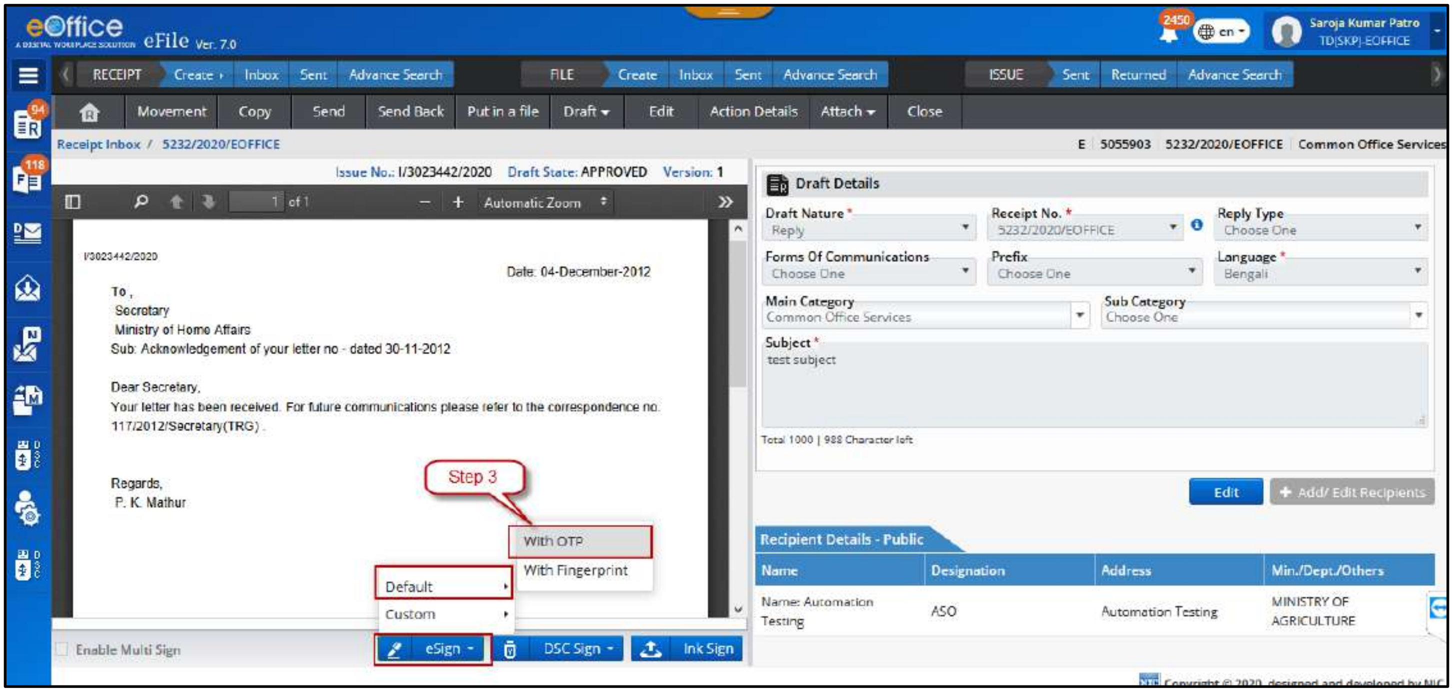



*Figure 93*

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

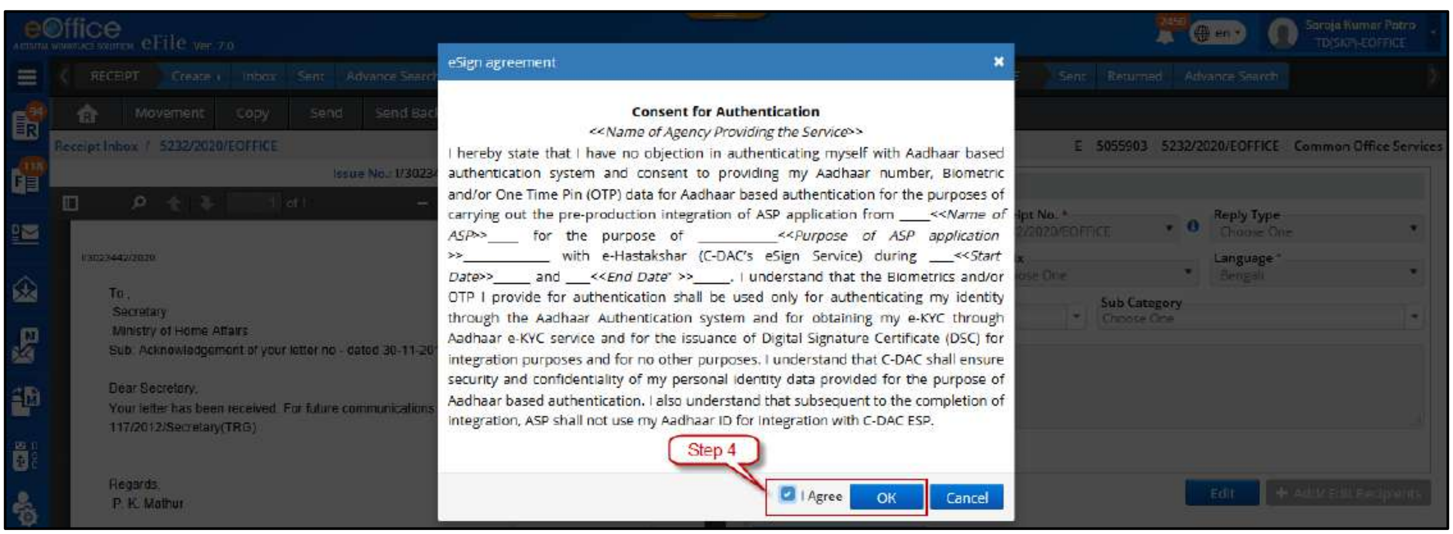



*Figure 94*

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


*Figure 95*

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

## To Sign with Fingerprint method at default location

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

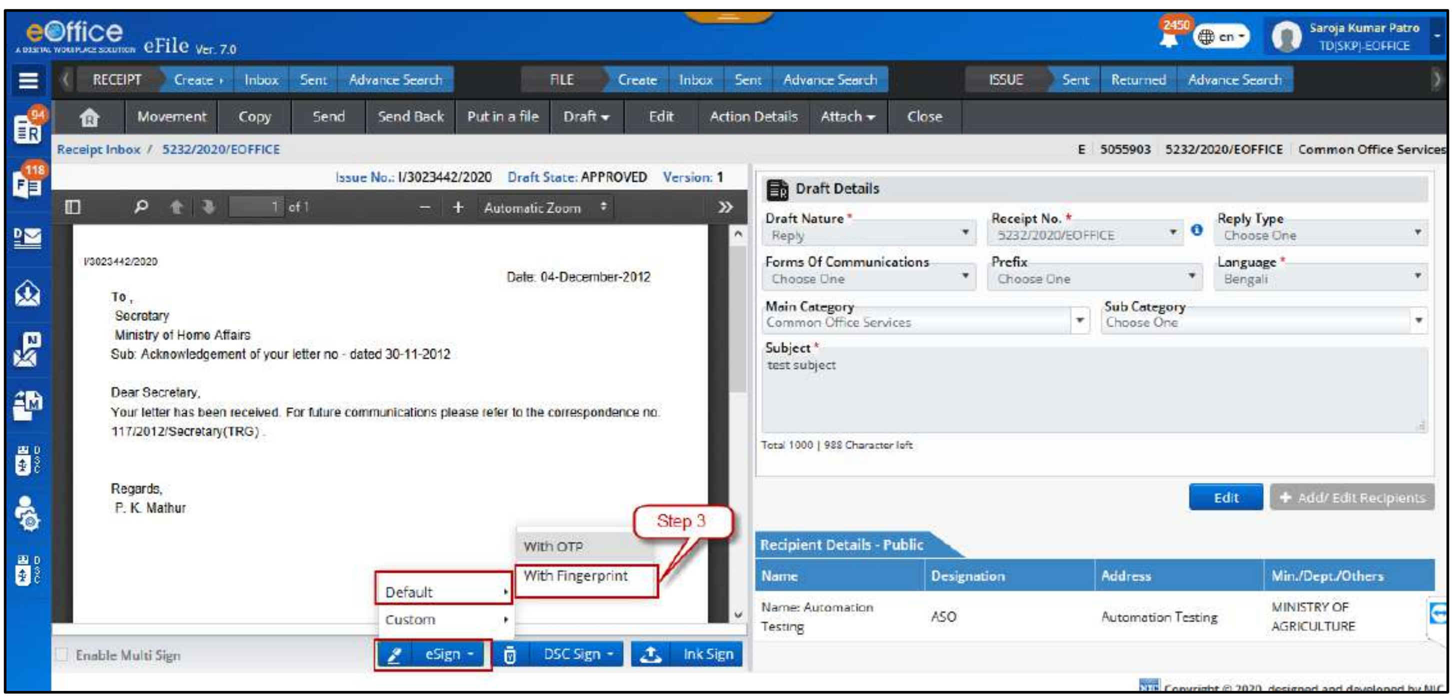



*Figure 96*

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

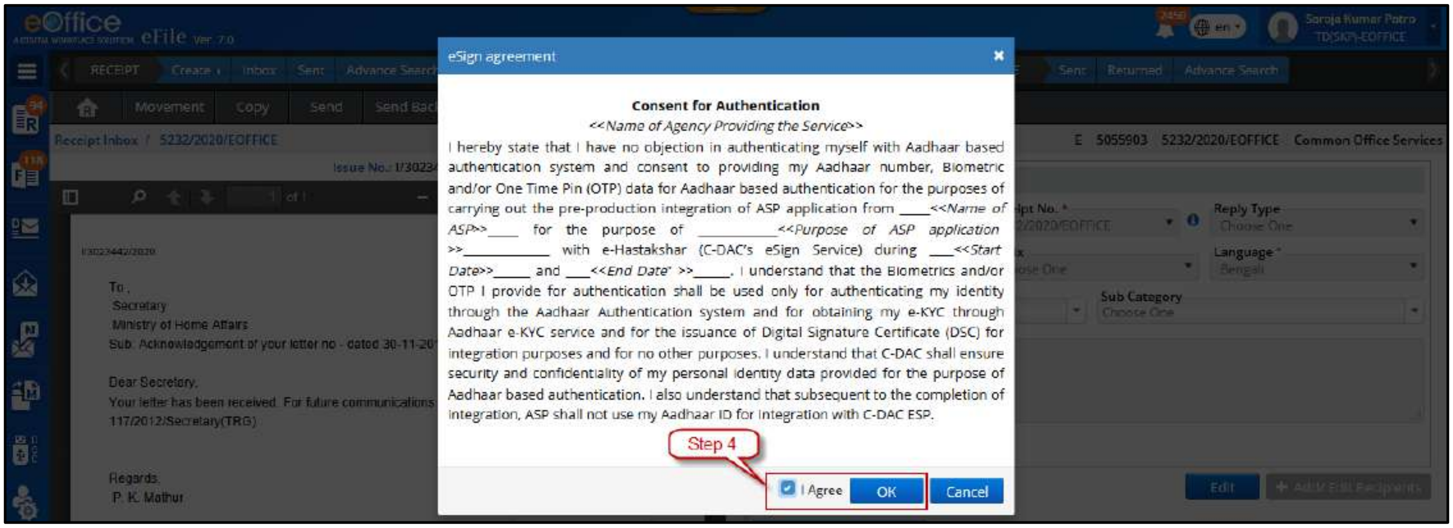



*Figure 97*

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


*Figure 98*

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

## To Sign with OTP method at location of your choice

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

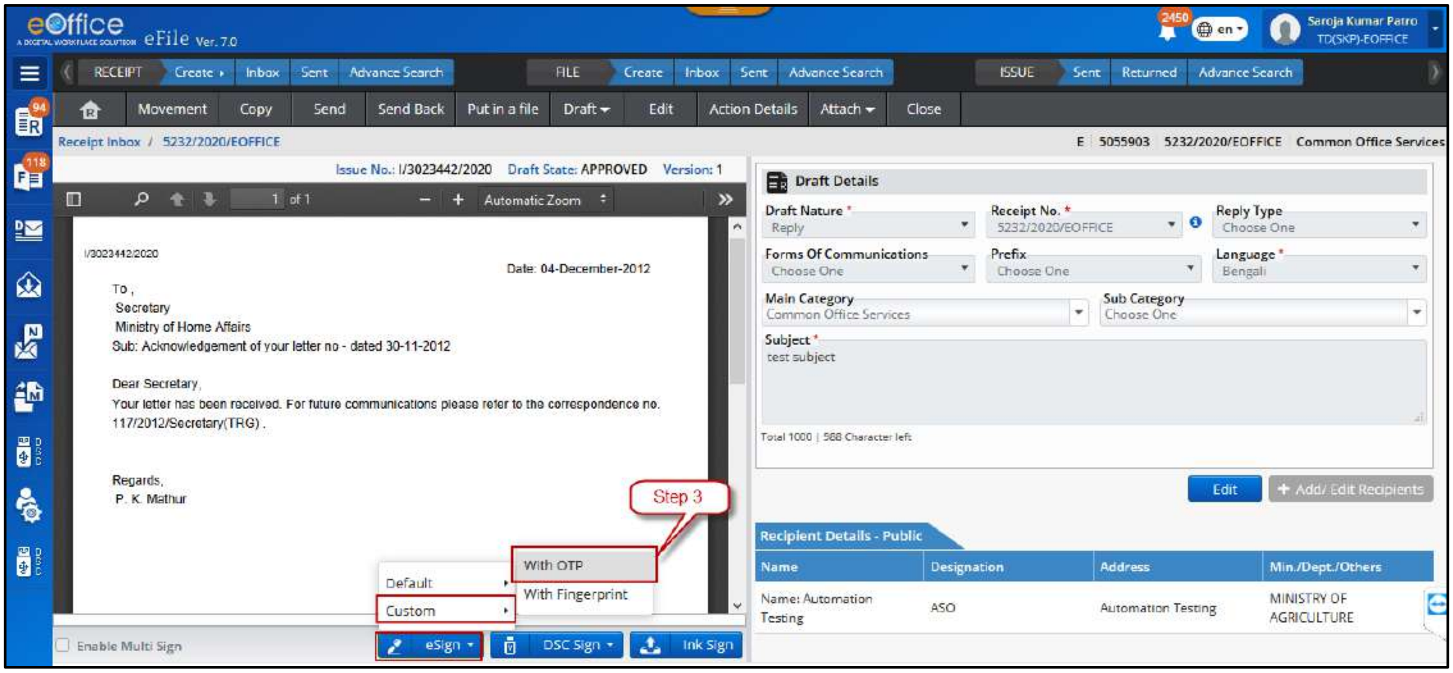



*Figure 99*

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

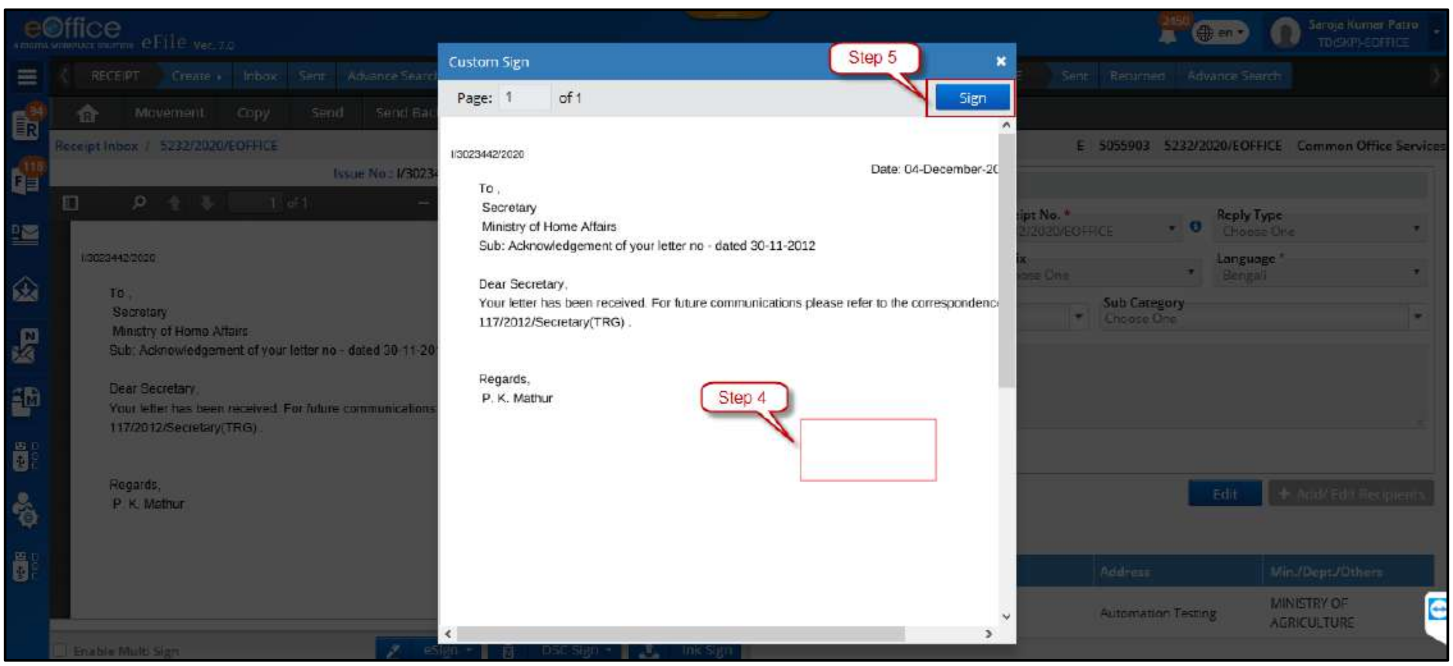



*Figure 100*

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

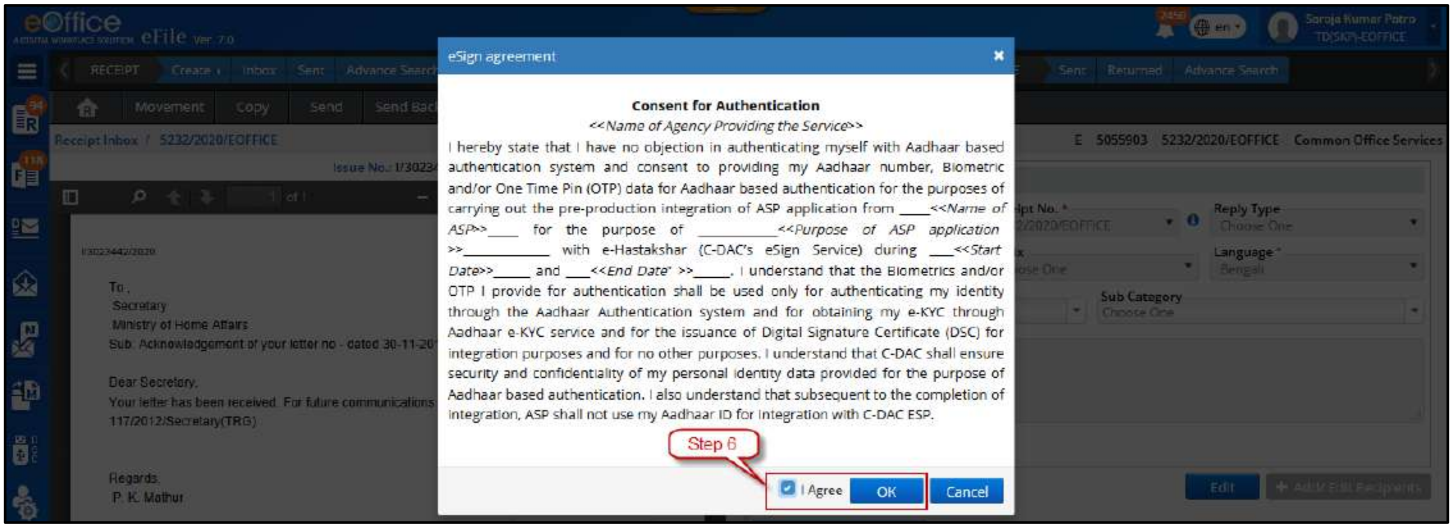



*Figure 101*

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


*Figure 102*

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

## To Sign with Fingerprint method at location of your choice

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

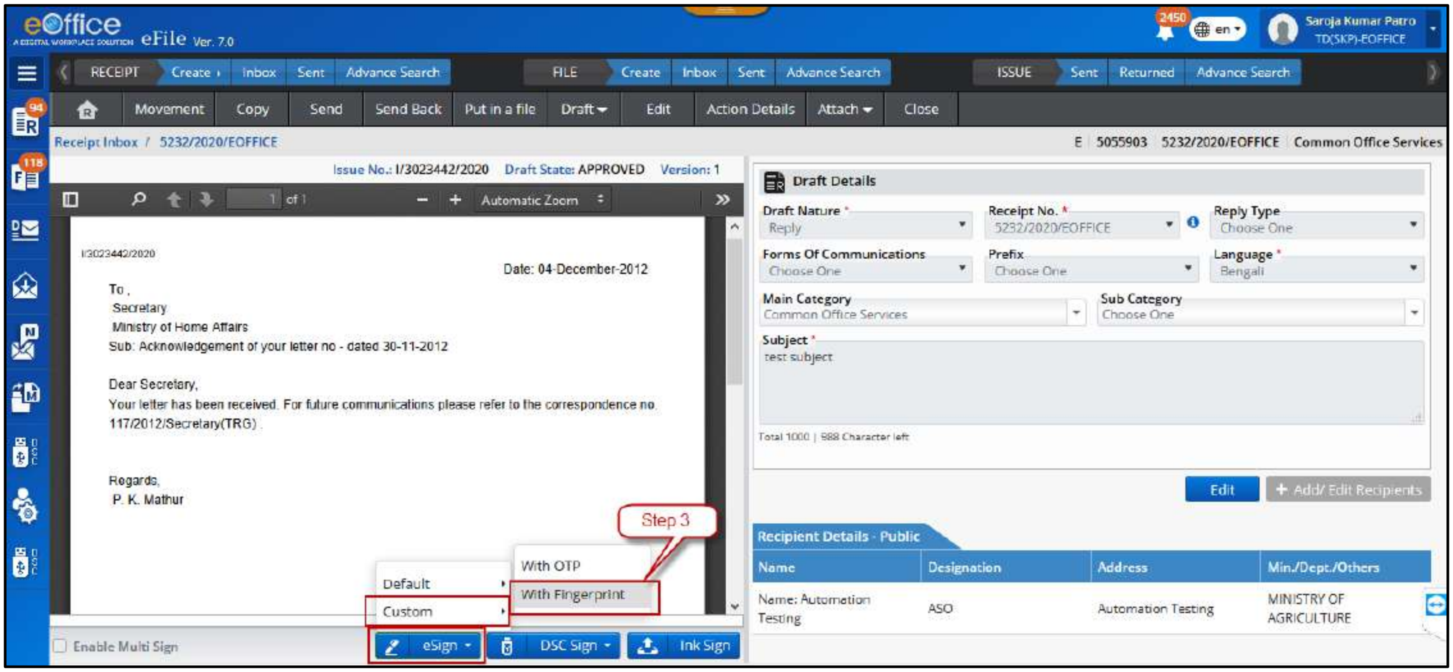



*Figure 103*

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

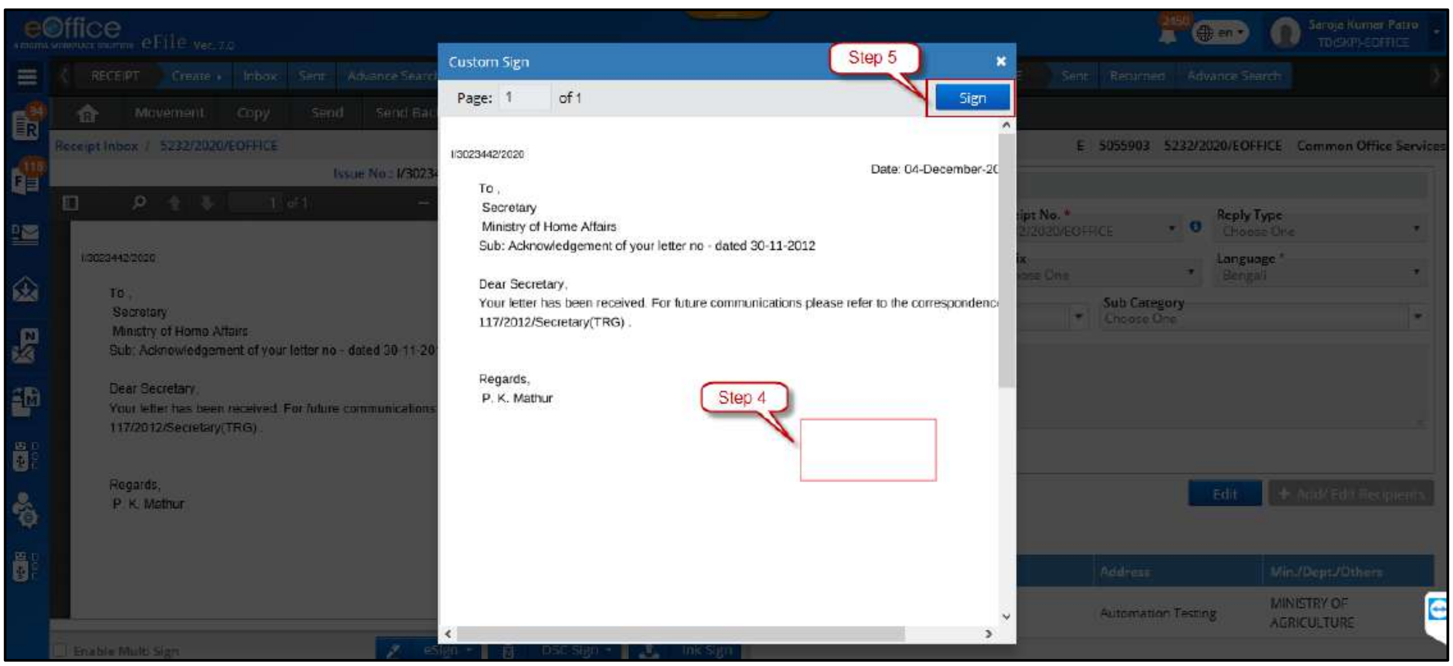



*Figure 104*

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

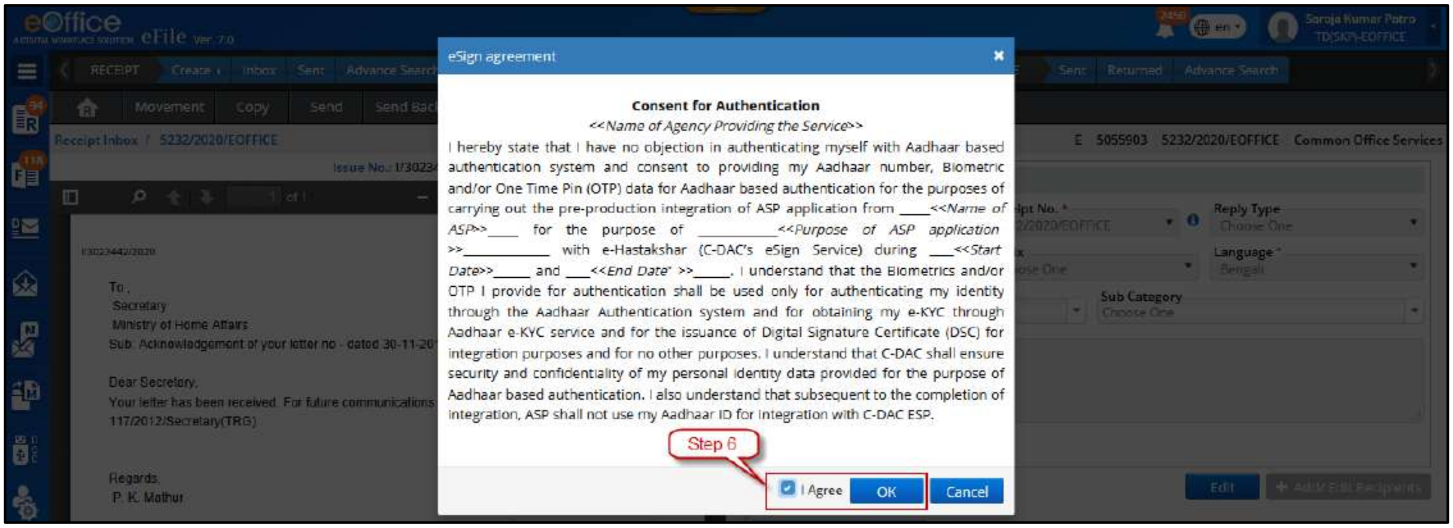



*Figure 105*

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


*Figure 106*

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

**Note:**

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

# Ink Sign

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

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

## STEPS TO FOLLOW:

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


*Figure 107*

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

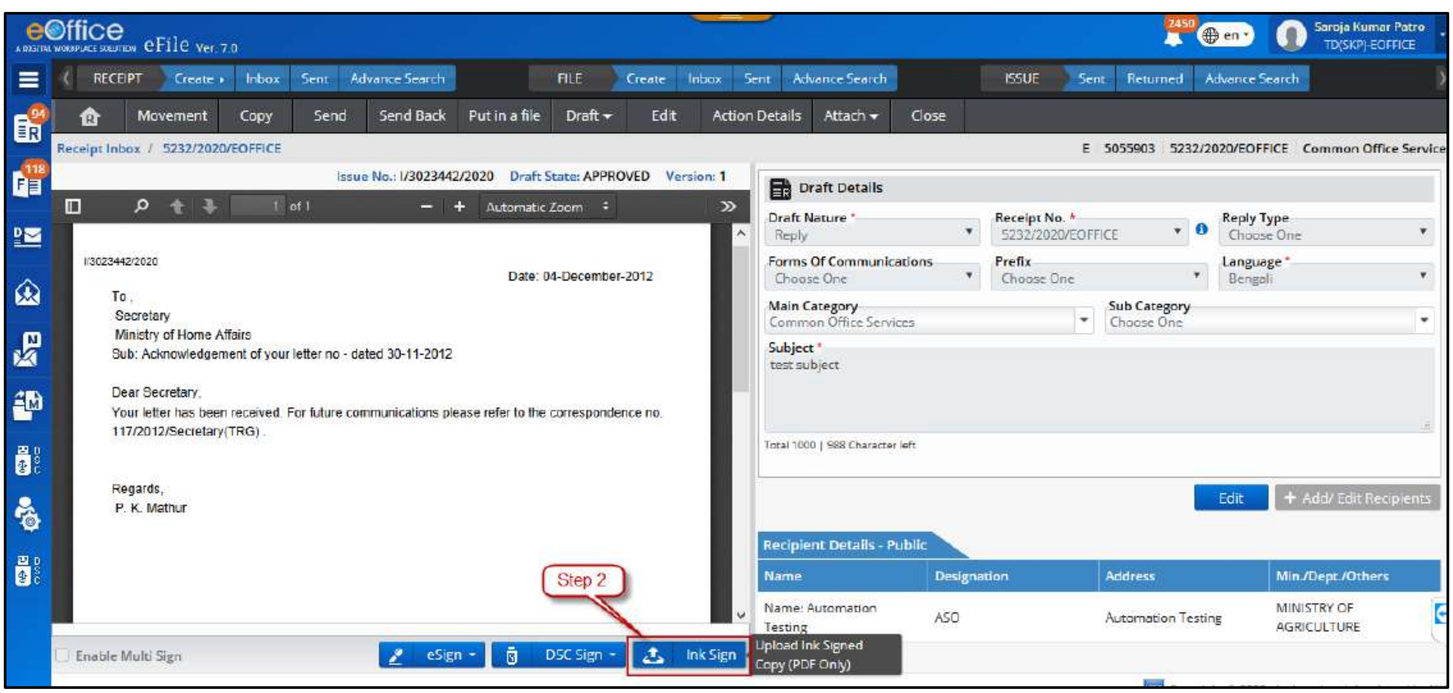



*Figure 108*

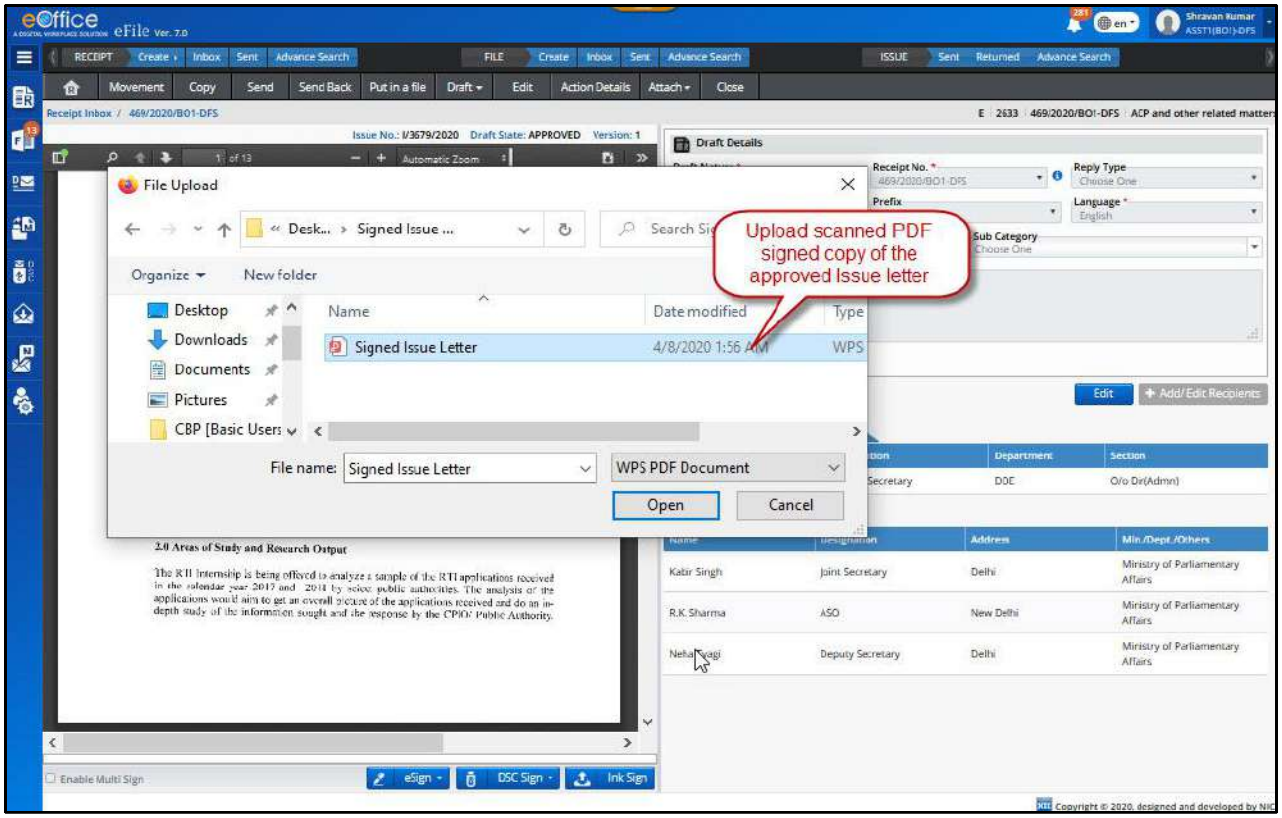



*Figure 109*

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

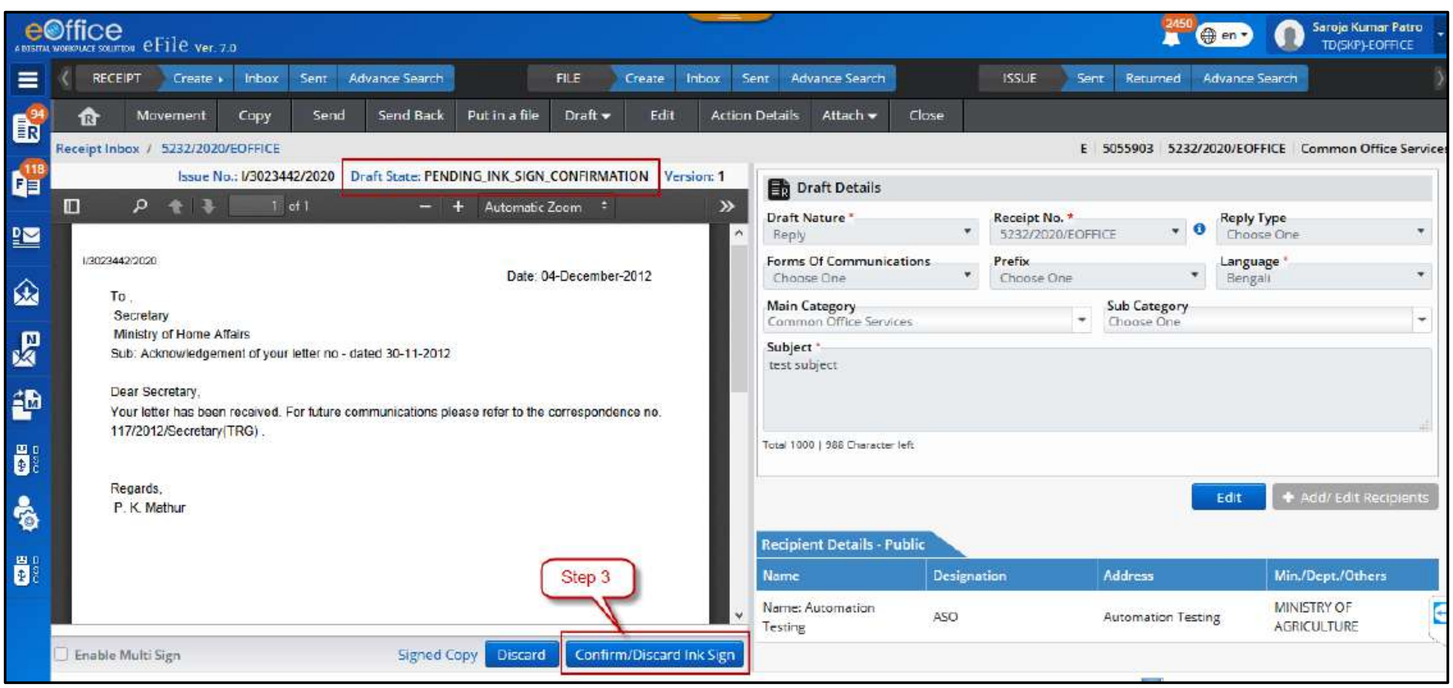



*Figure 110*

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

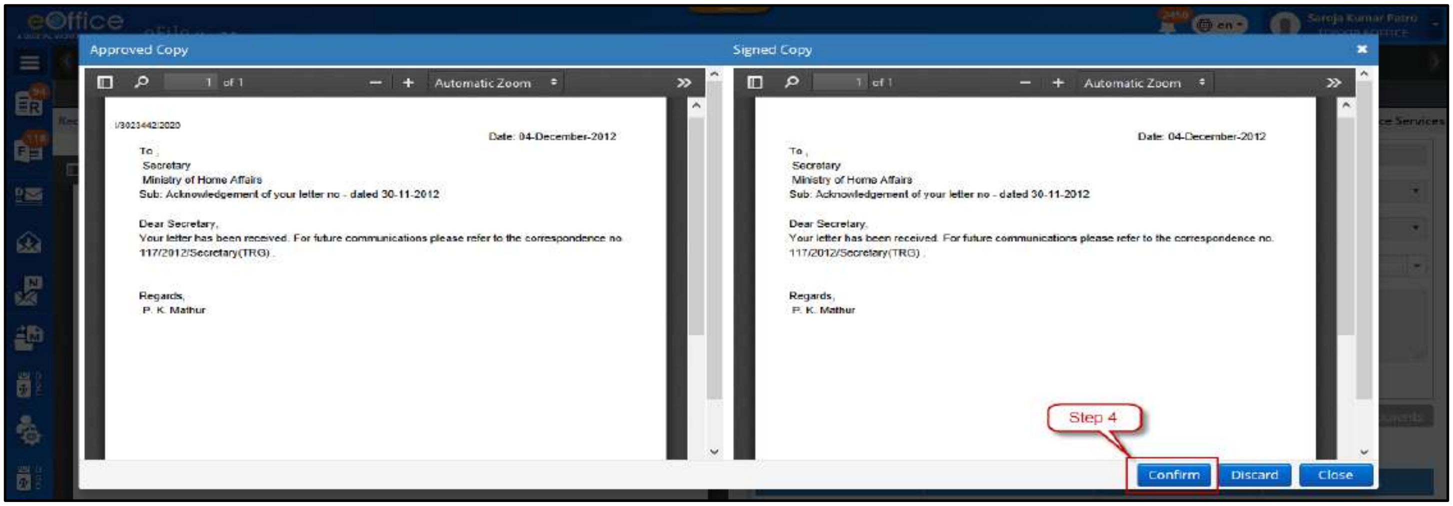



*Figure 111*

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

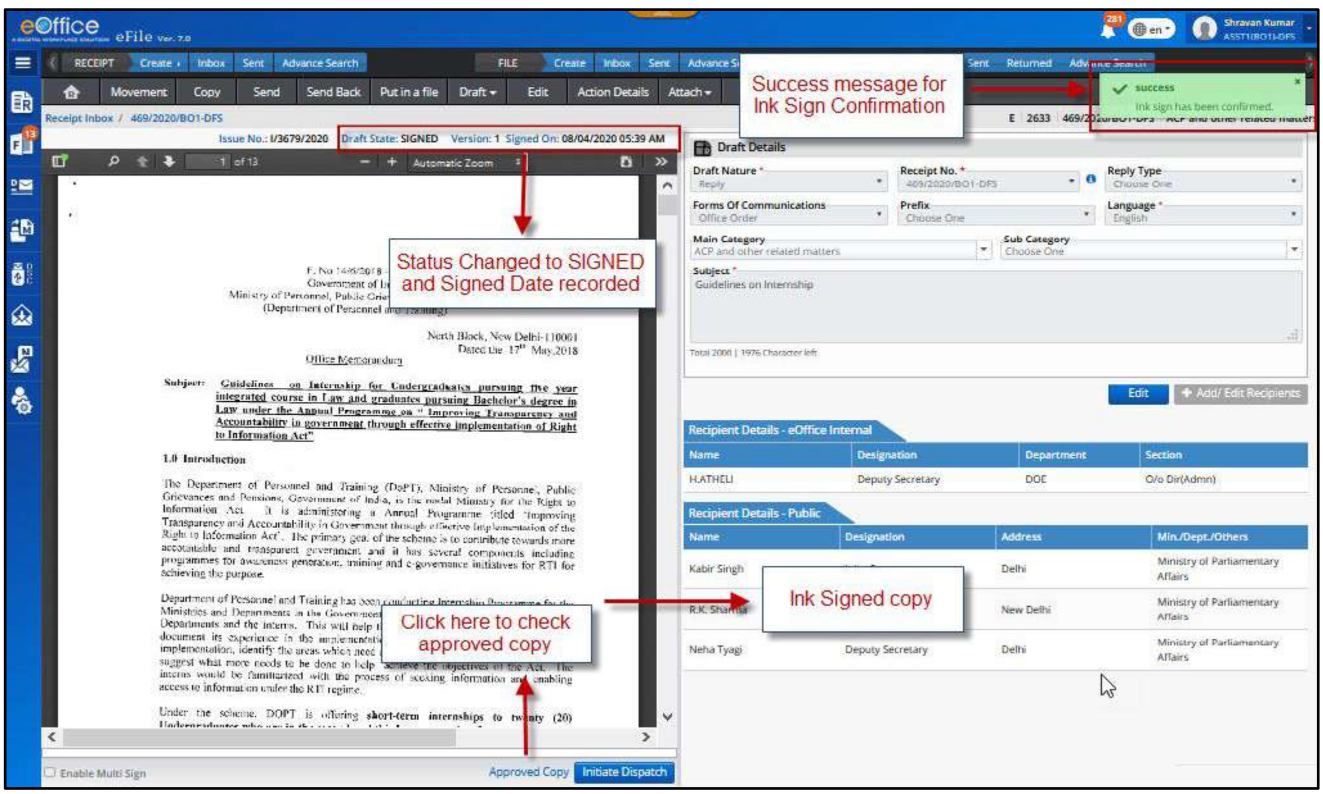



*Figure 112*

**Note:**

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

# Dispatch from Receipt

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

## Electronic Receipts

### STEPS TO FOLLOW:

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

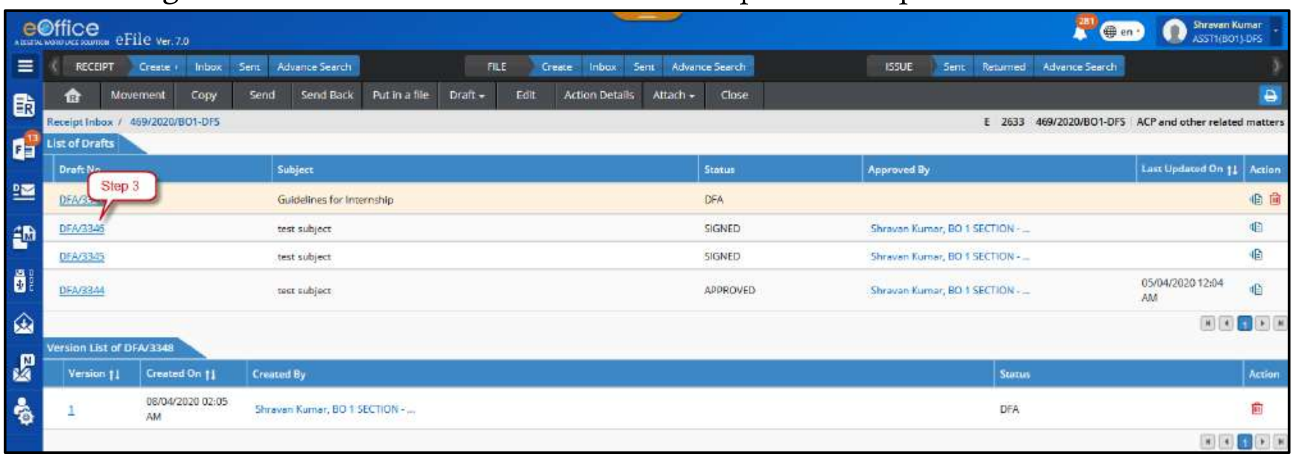



*Figure 113*

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

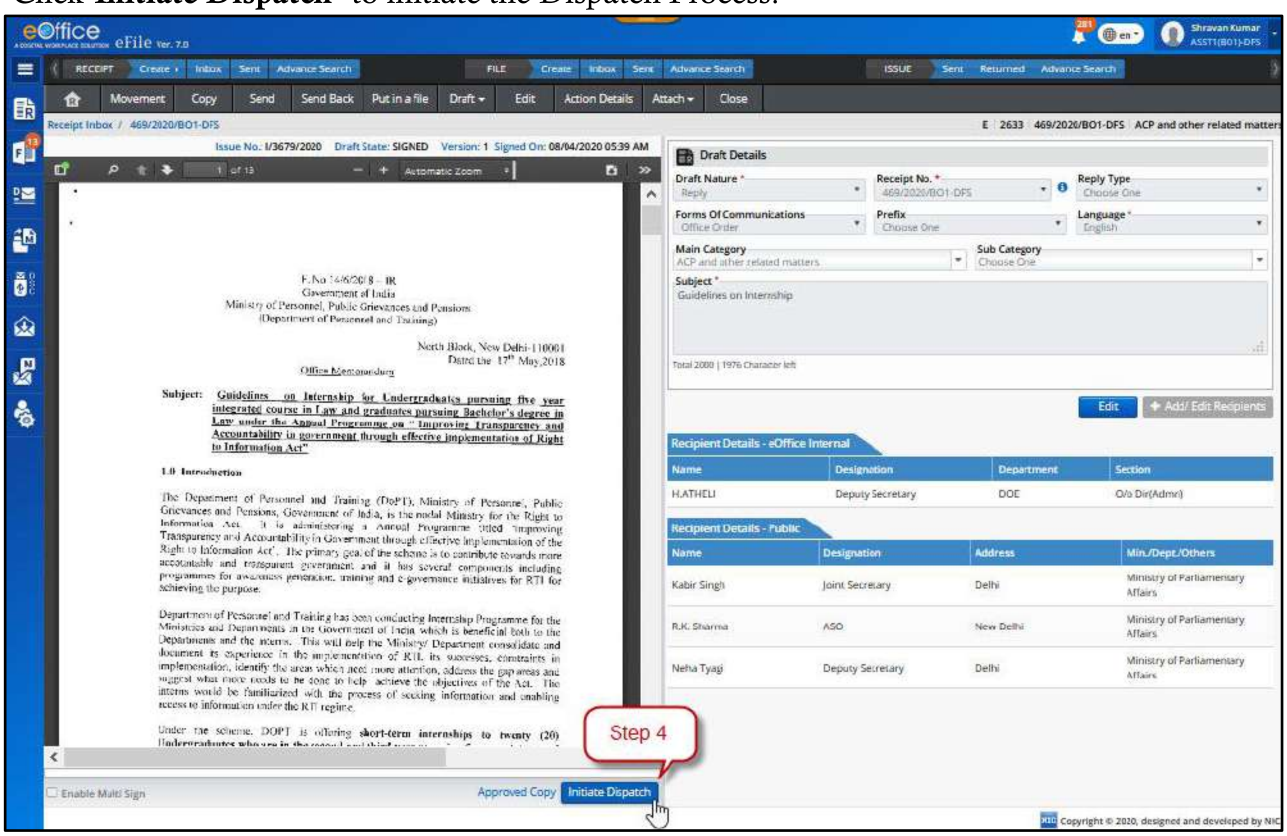



*Figure 114*

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

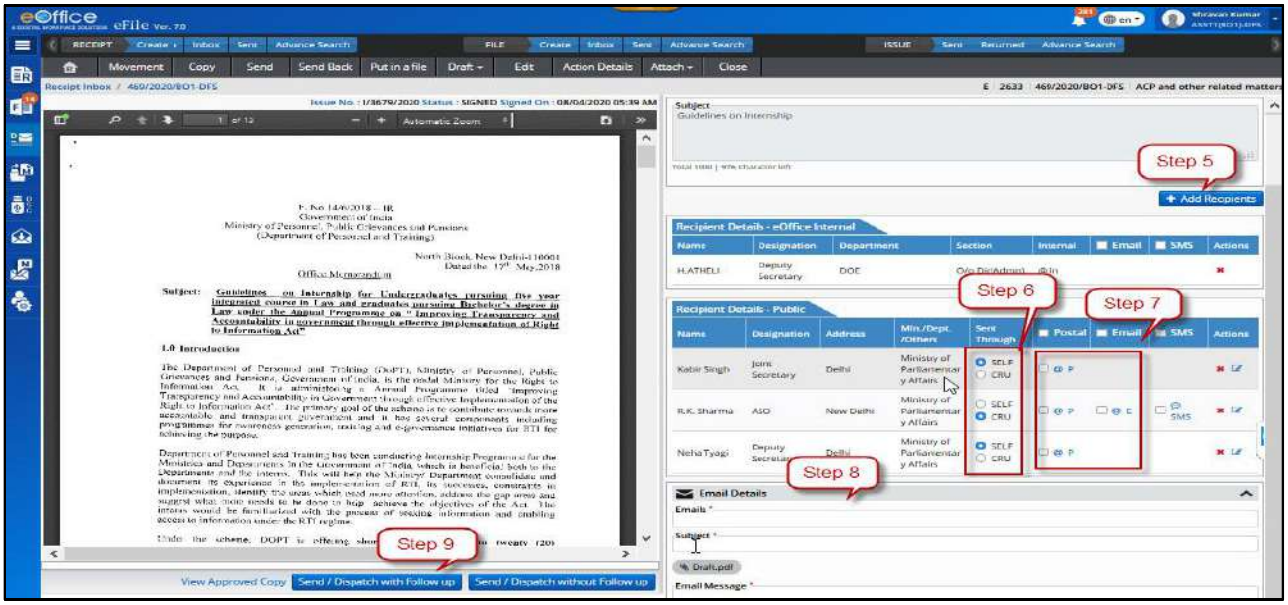



*Figure 115*

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

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

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

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

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

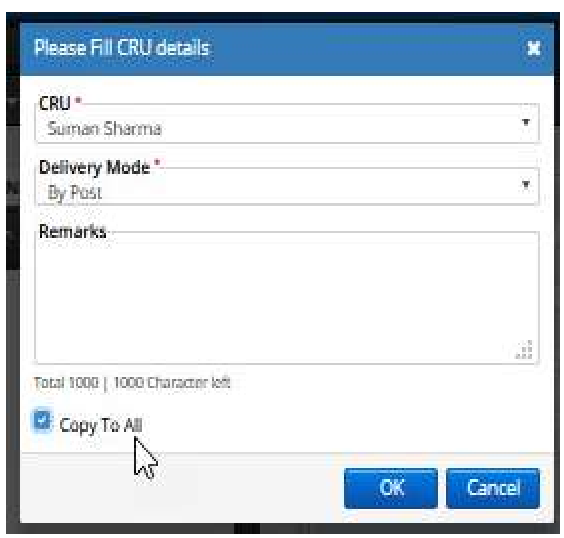



*Figure 116*

**Note:**

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

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

**Note:**

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

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

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

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

**Note:**

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

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

7. Click **Send –**

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

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

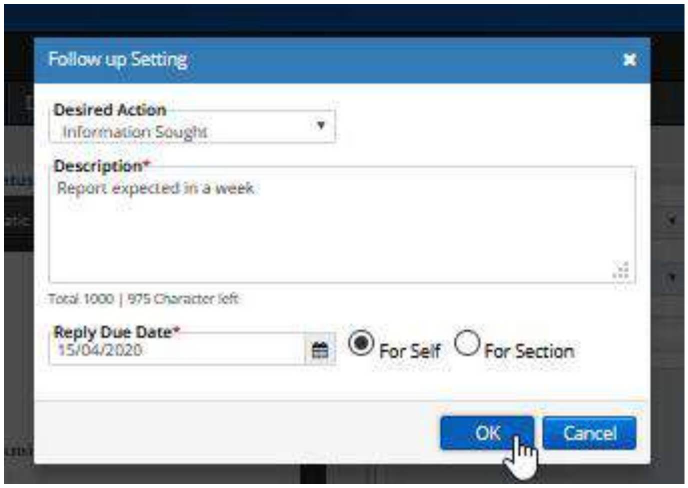



**Figure 117**

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

**Note:**

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

# Physical Receipts

## STEPS TO FOLLOW:

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

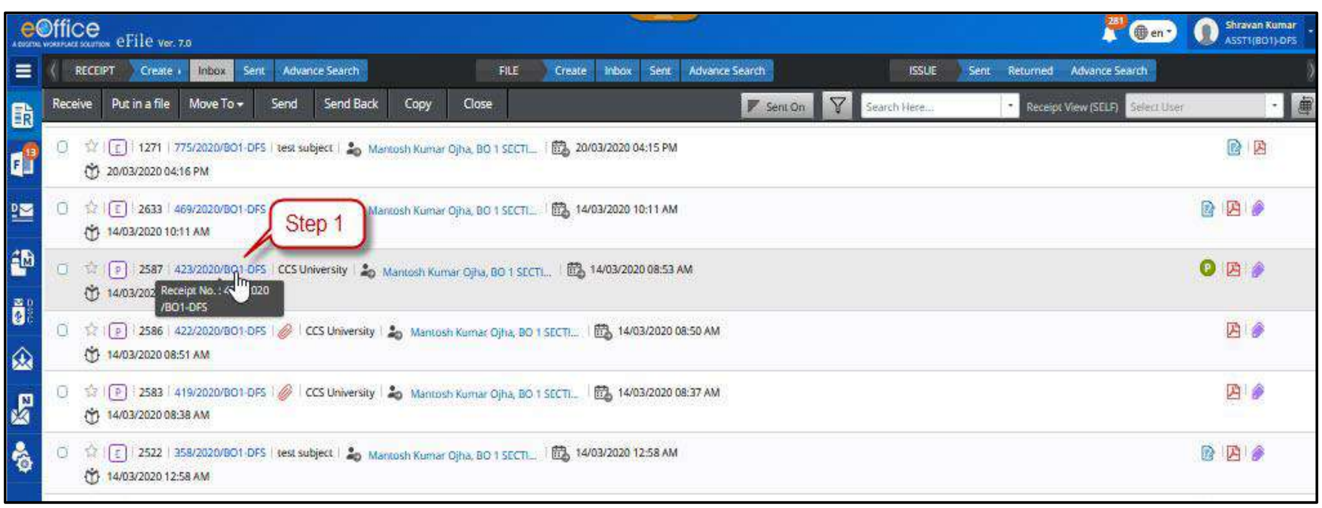



*Figure 118*

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

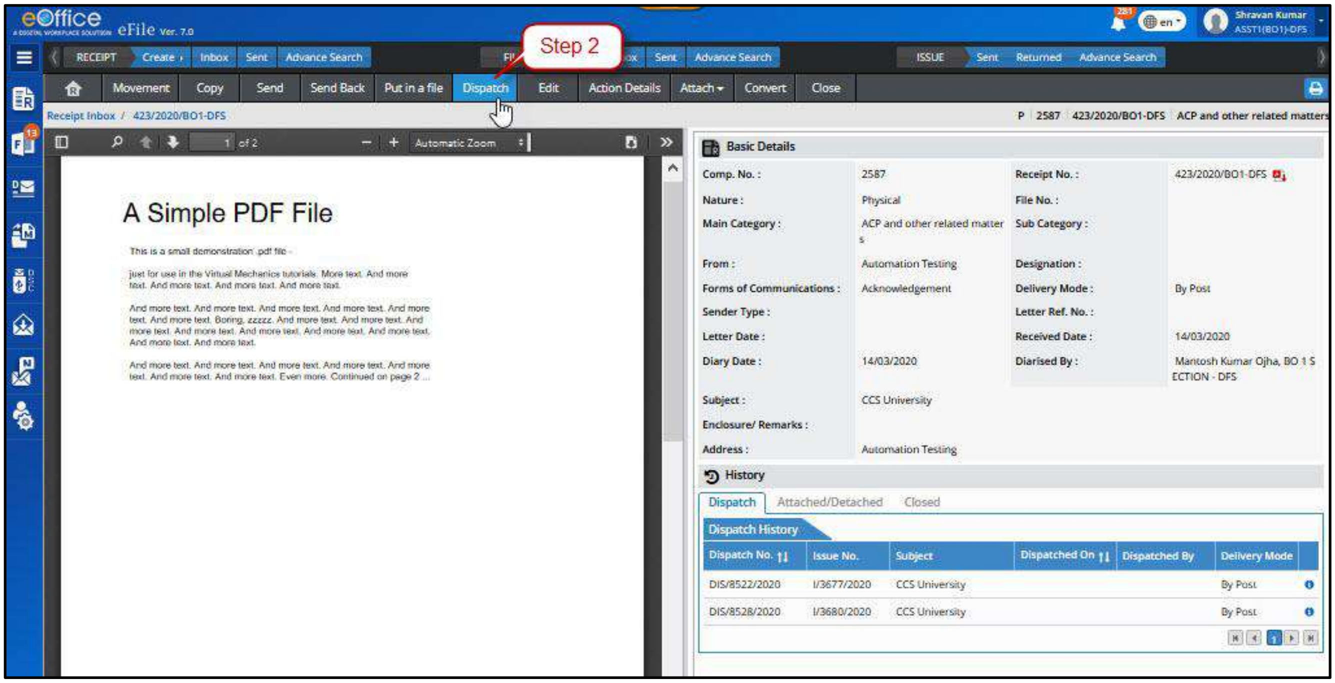



*Figure 119*

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

**Note:**

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

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

**Note:**

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

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

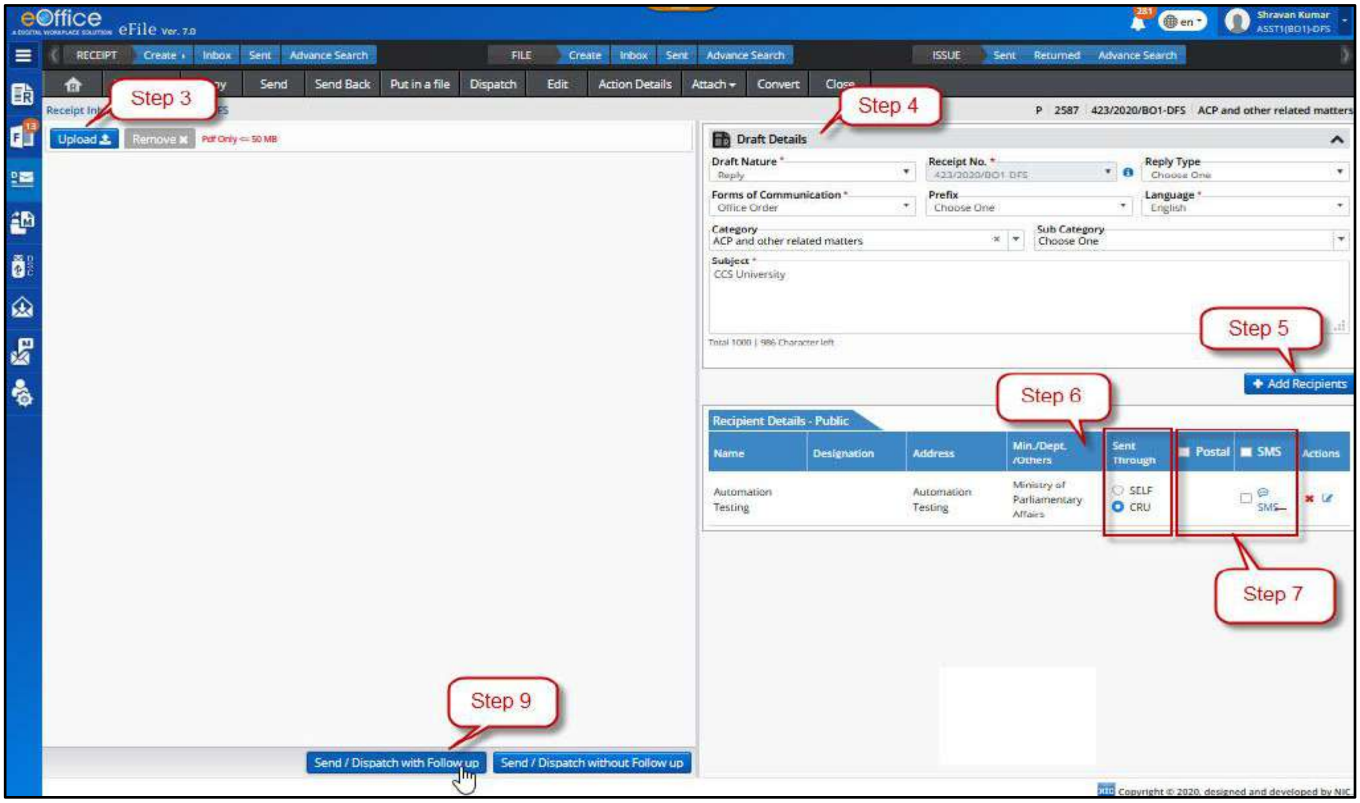



*Figure 120*

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

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

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

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

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

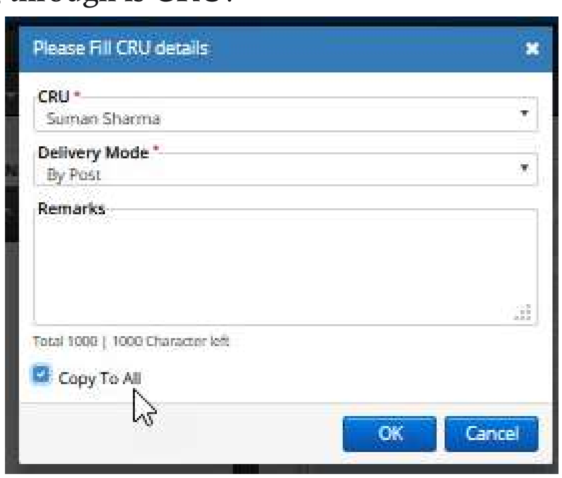



*Figure 121*

**Note:**

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

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

**Note:**

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

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

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

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

**Note:**

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

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

**Note:**

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

6. Click **'Send' –**

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

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

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

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

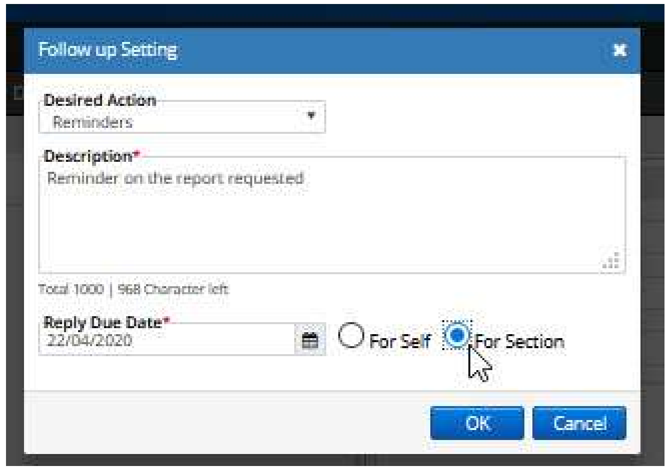



*Figure 122*

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

**Note:**

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

# Send Receipt

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

## Important Points:

- ✓ Receipt can be forwarded to only one user in '**To**' and multiple in '**CC**'.
- ✓ Physical receipts should be in received state in **Inbox/Inbox Folder** to forward further.
- ✓ Multiple receipts can be sent by selecting multiple receipts from **Inbox/Inbox Folder** and **Created l**ist page.
- ✓ Receipts forwarded from **Sen**t list, are sent as CC (copy) of the main receipt.

**STEPS TO FOLLOW:**

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

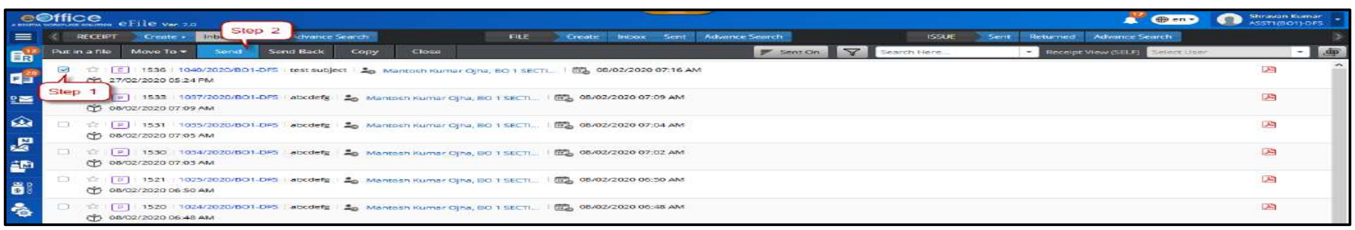



Figure 123

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

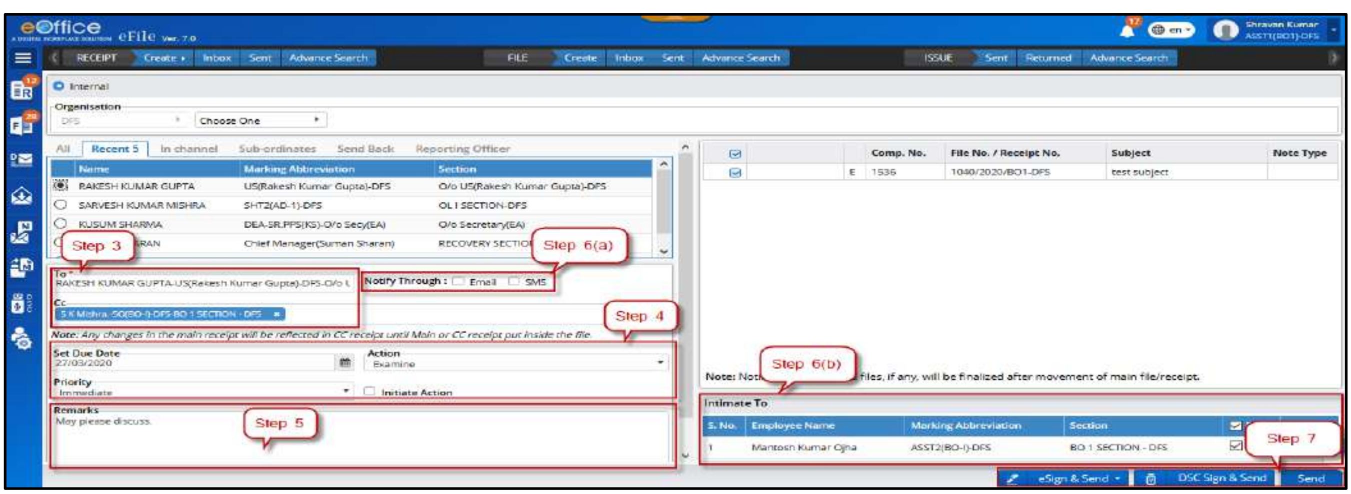



Figure 124

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

   **'eSign & Send' –** To digitally sign and send using AADHAR based eSign services.

   Or

   **'DSC Sign & Send' –** To digitally sign and send using eToken.

   Or

   **'Send'** – To send the receipt without signing digitally.

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

## OTP based 'eSign & Send'

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

## Fingerprint based 'eSign & Send'

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

## DSC Sign and Send

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

## KEY POINTS:

- **Inter Department Receipt Movement** - Receipt can be forwarded to users of other departments by choosing department from Organization hierarchy list and then users, in case for single instance multiple departments. By default, self-department is selected. (*Configuration based feature*).
- **Ease in Forwarding –** Provision of segregated send 'To' and 'CC' employee list to choose from, based on –
    a) **Recent 5** – List of last five employees/users to whom receipts have been forwarded
    b) **In Channel** – List of employees already in channel of submission/movement of the receipt.
    c) **Sub-ordinates** – List of employees directly reporting to the user who is forwarding the receipt.
    d) **Send Back** – Auto populating the name of the employee from whom the receipt was received.
    e) **Reporting Officer** – Auto populating the user's reporting officer name.
    f) **Group** – Adding all or selective users from a group of employees already created by the user who has forwarded. This is visible/can be used only for **'CC'**, since receipt can be forwarded to only one user in **'To'**.
- **Intimate To –** This allows user to intimate all or selective employees/users already in channel of submission/movement of the receipt, about the current forwarding movement. This can be done via SMS and e-mail.

**Note:**

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

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

# Receipt Sent List

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

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

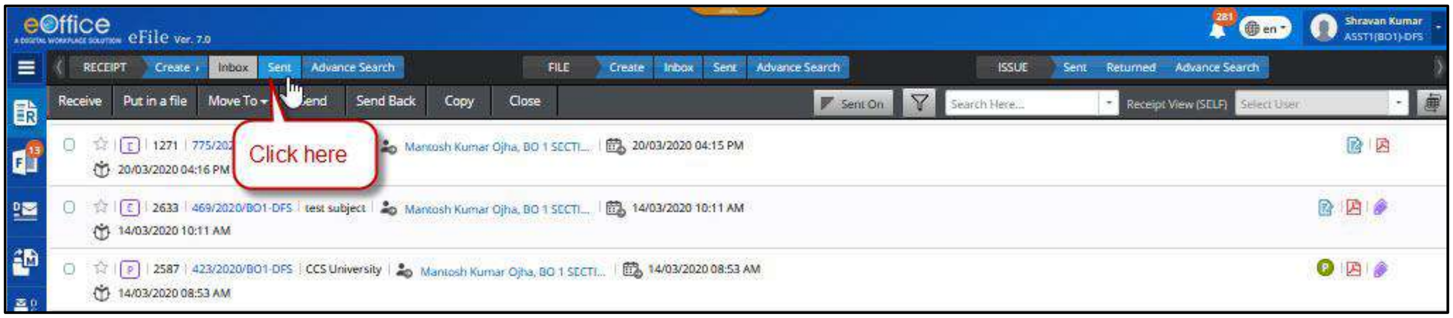



*Figure 125*

## *Description:*

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

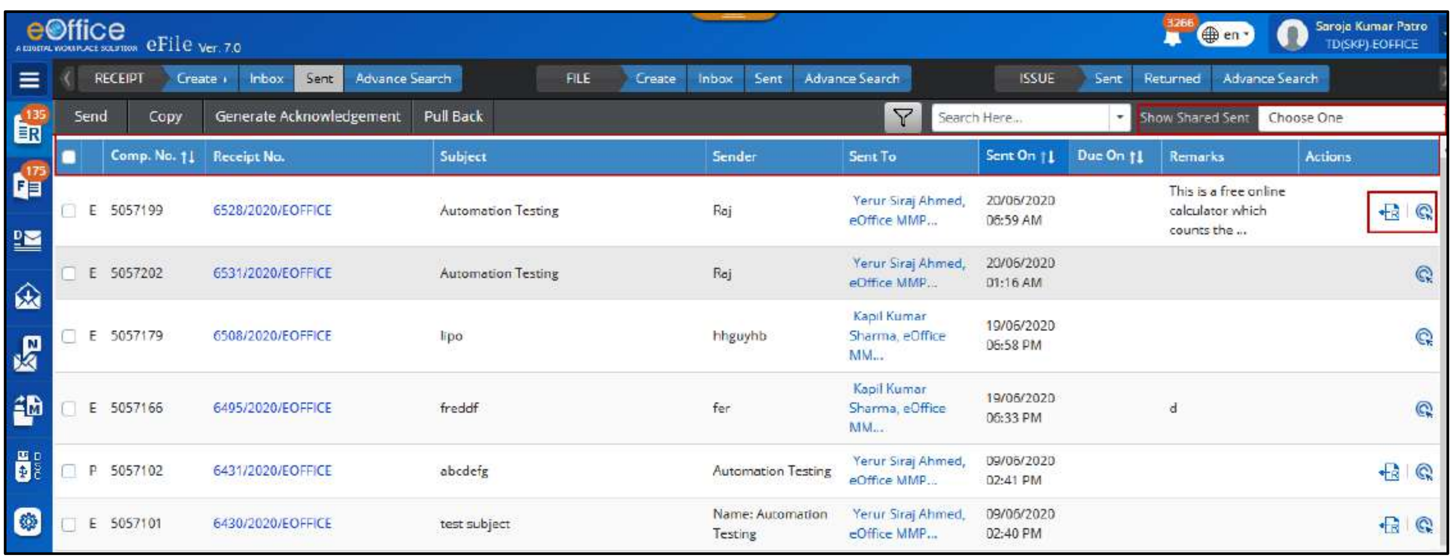



*Figure 126*

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

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

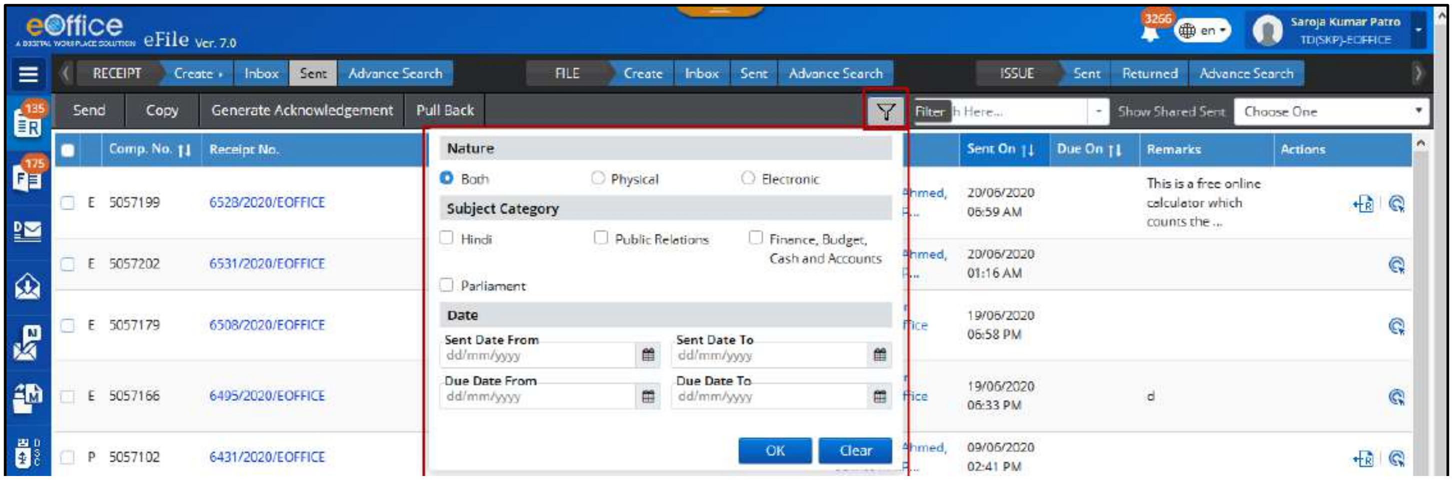



*Figure 127*

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


*Figure 128*

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

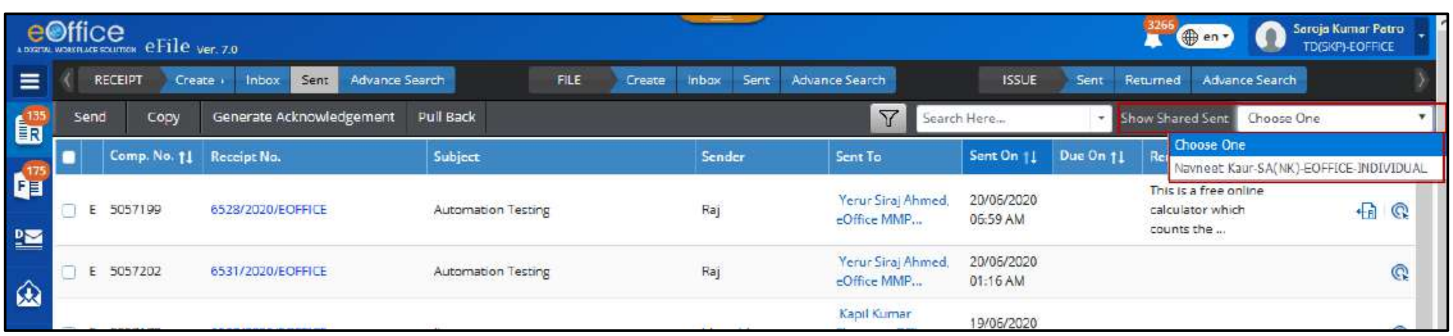



**Figure 129**

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

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

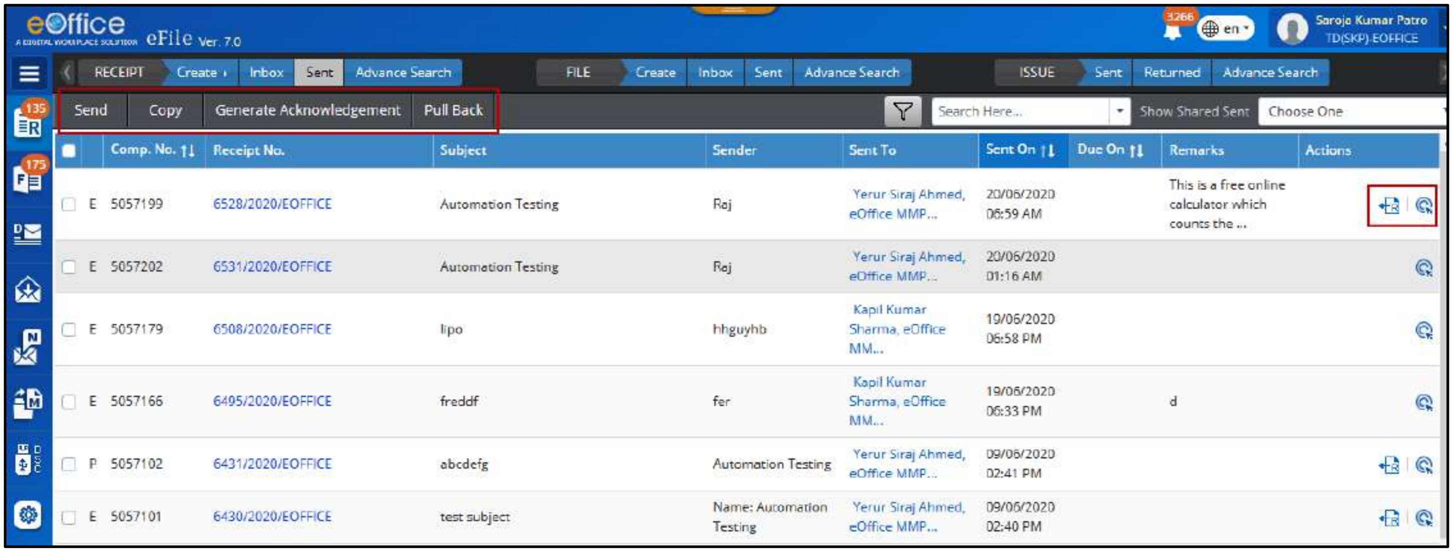



*Figure 130*

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

# Receipt Pull Back

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

## Important Points:

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

**STEPS TO FOLLOW:**

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

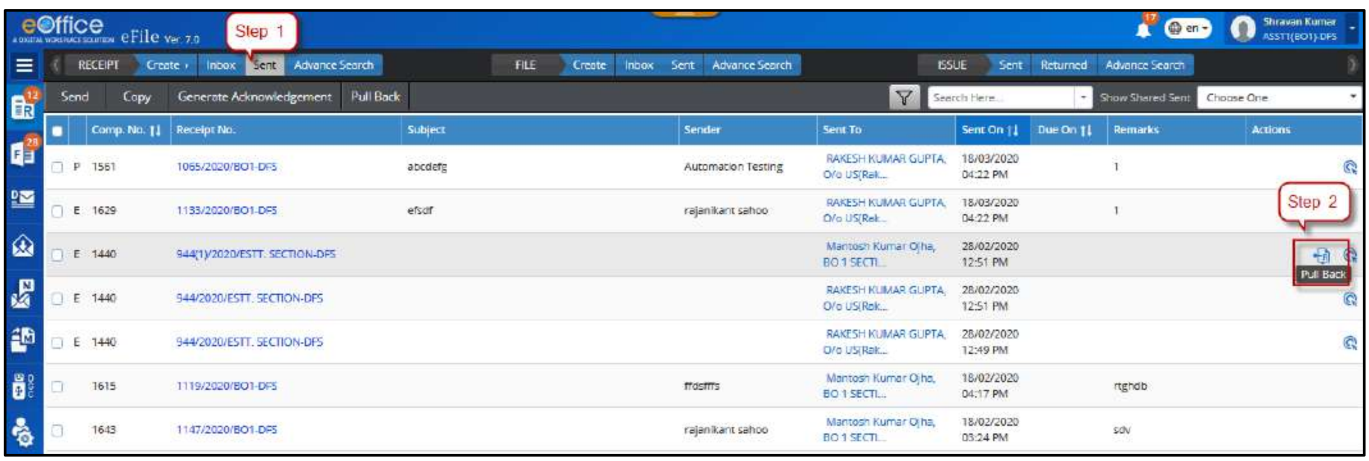



*Figure 131*

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

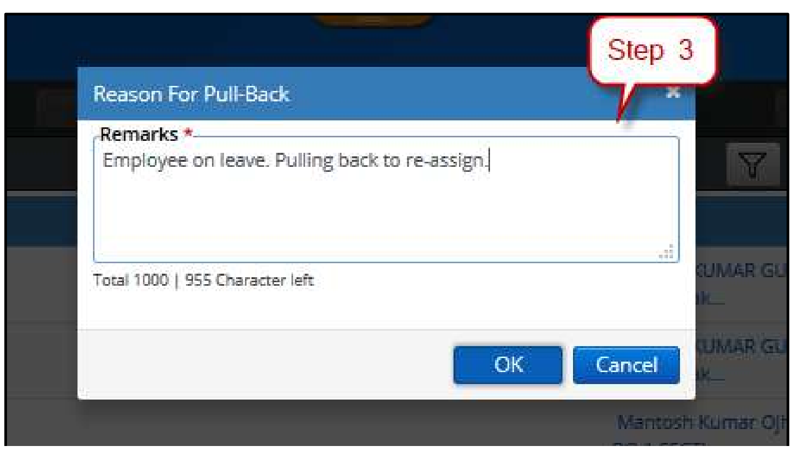



*Figure 132*

## STEPS TO PULL BACK MULTIPLE RECEIPTS

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

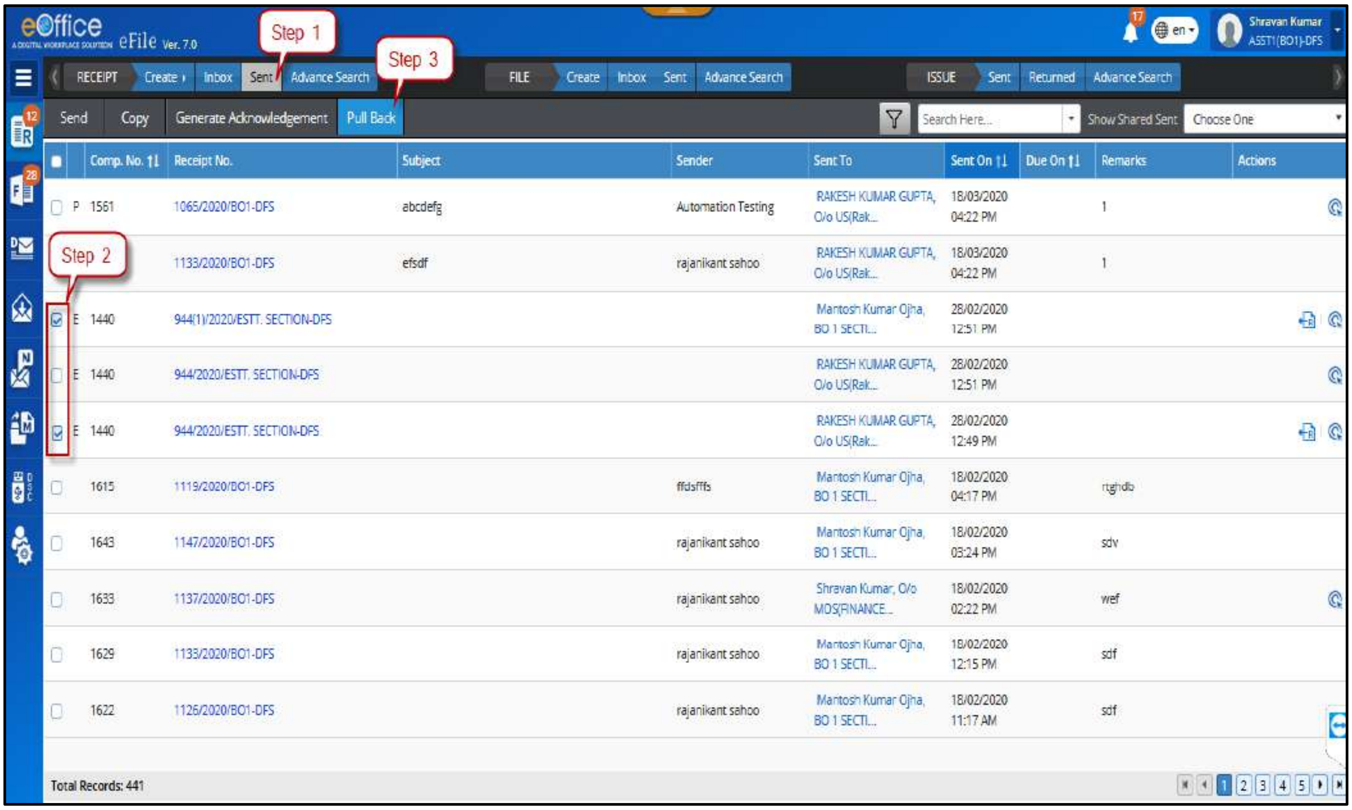



*Figure 133*

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

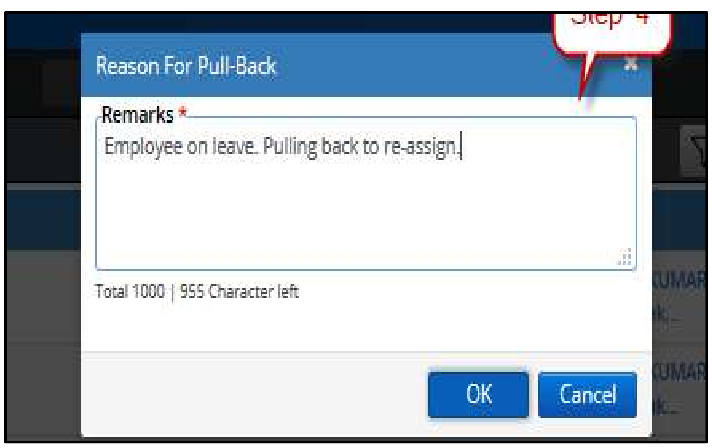



*Figure 134*

## STEPS TO PULL BACK RECEIPTS FROM ADVANCE SEARCH

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

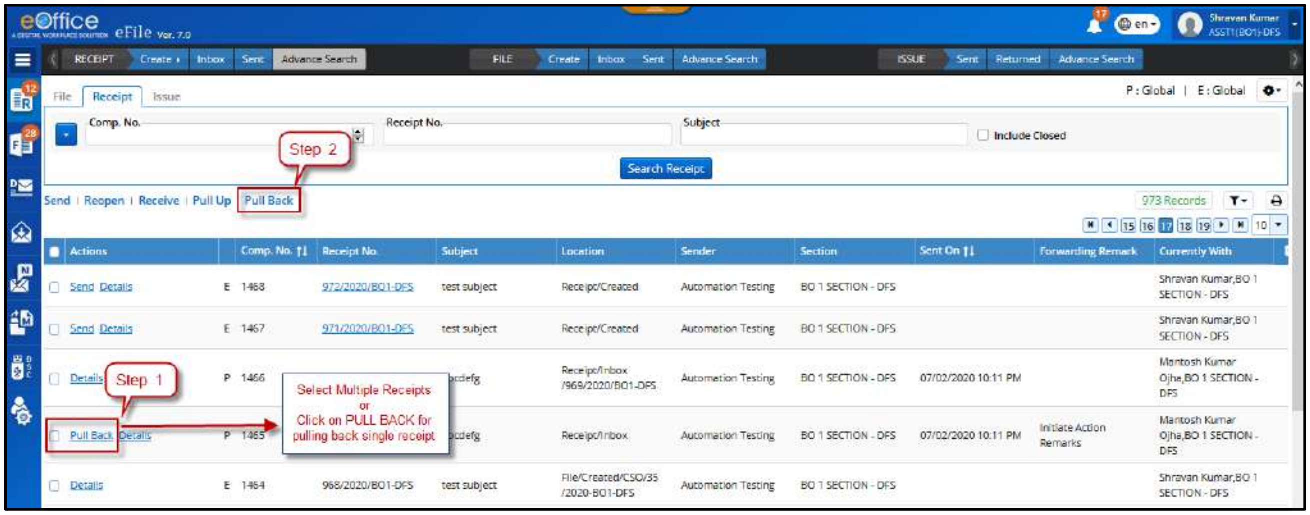



*Figure 135*

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

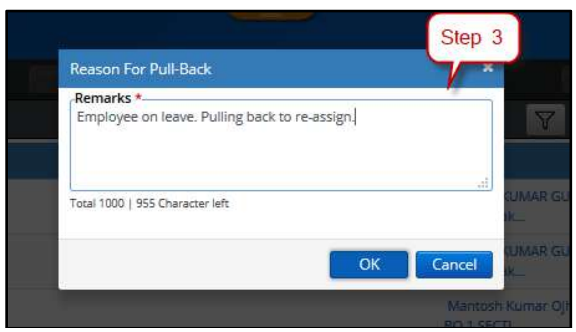



*Figure 136*

**Note:**

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

# Receipt Pull up

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

**Important Points:**

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

**STEPS TO FOLLOW:**

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

   Or

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

**Note:**

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

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

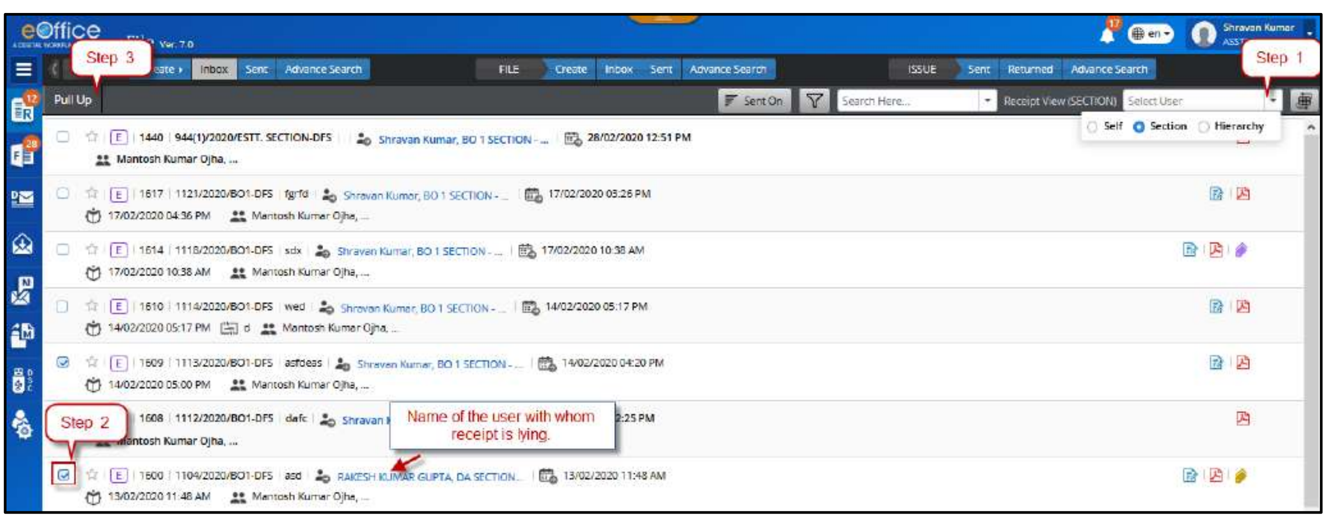



*Figure 137*

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

   Receipt(s) should now be available in **Inbox**.

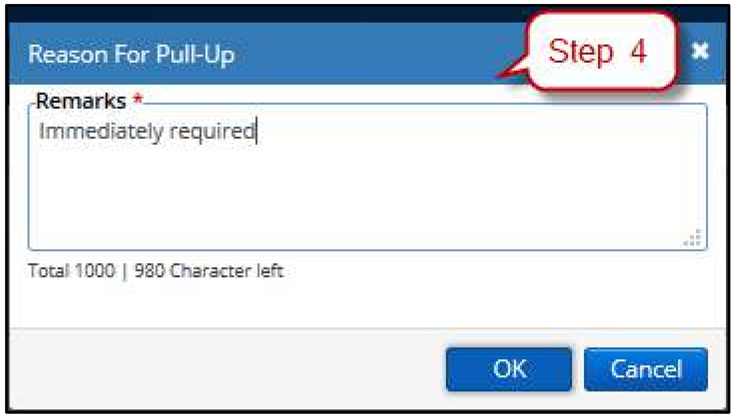



*Figure 138*

## STEPS TO PULL UP RECEIPTS FROM ADVANCE SEARCH

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

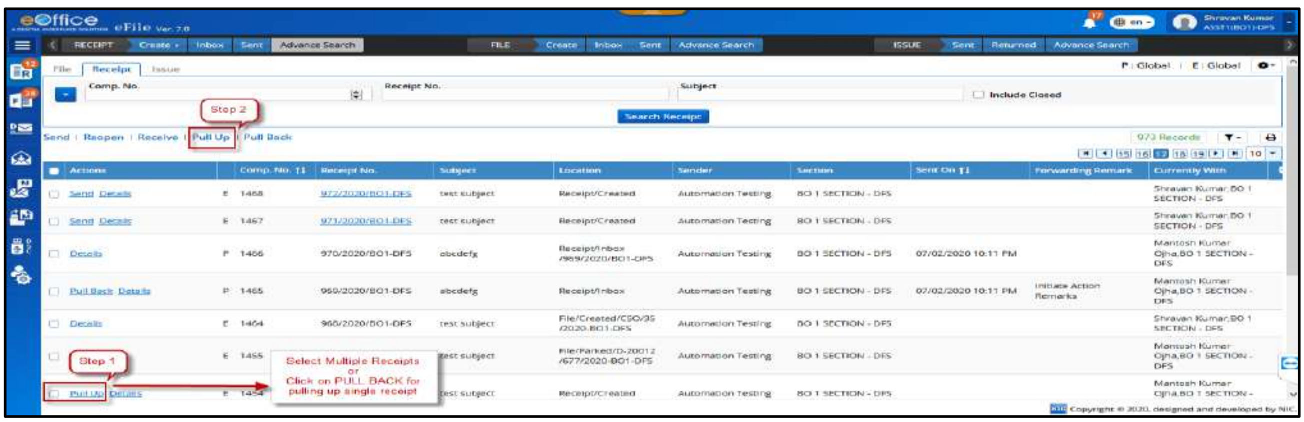



*Figure 139*

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

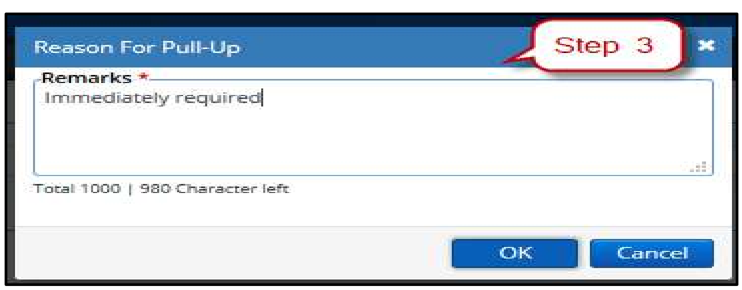



*Figure140*

**Note:**

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

# Initiate Action (P/E)

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

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

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

**'Initiate Action'** primarily consists of –

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

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

**Important Points:**

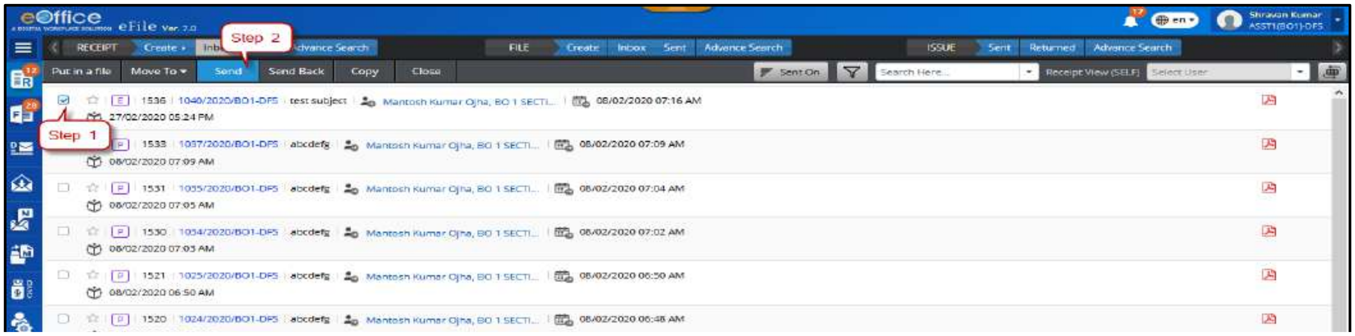
- ✓ Action on receipts in sent box, can only be Initiated for the ones in active state (not closed).
- ✓ Multiple Actions cannot be initiated on a receipt, only one at a time.
- ✓ Initiate action is a configuration-based feature. Available, if the configuration is enabled.
- ✓ After enabling configuration,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

## Initiate Action

**STEPS TO FOLLOW:**

***From Receipt Send Page***

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




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

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

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

### *From Receipt Sent List*

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

# Add Comments to Initiated Action

## STEPS TO FOLLOW:

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

**Note:**

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

# Review / Initiated Action Details

**STEPS TO FOLLOW:**

## *From Receipt Inbox*

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

## *From a Receipt Already Attached to a Receipt*

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

## *From a Receipt Already Attached to a File*

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

## *From ToC list of a file in Inbox:*

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

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

### *From Advanced Search Output:*

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

## Closing Initiated Action

### STEPS TO FOLLOW:

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

# Closing of Receipts

A receipt may be required to close in case when –

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

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

**Important Points:**

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

## STEPS TO FOLLOW:

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

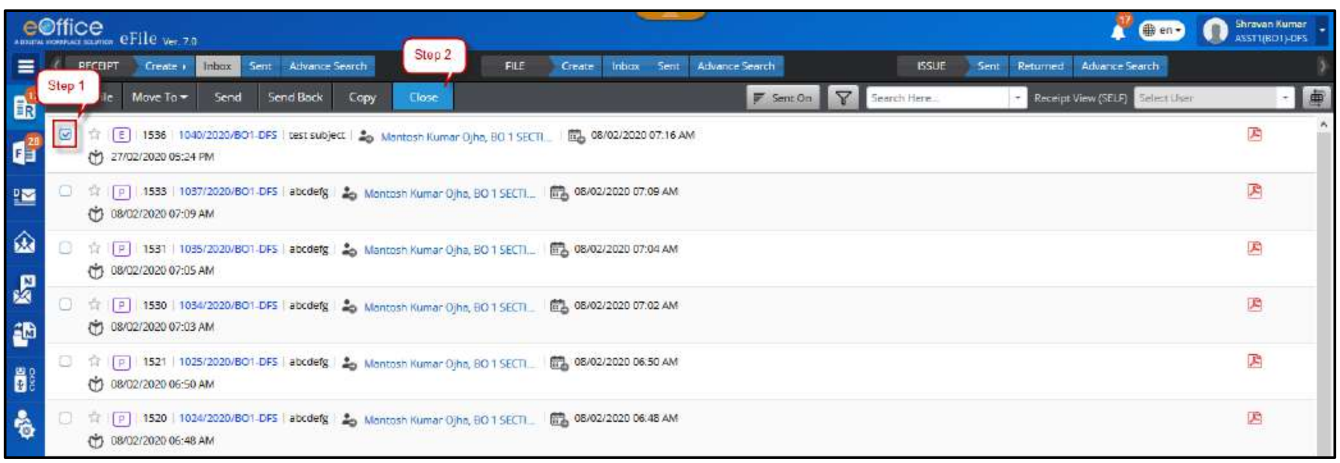



*Figure 141*

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

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

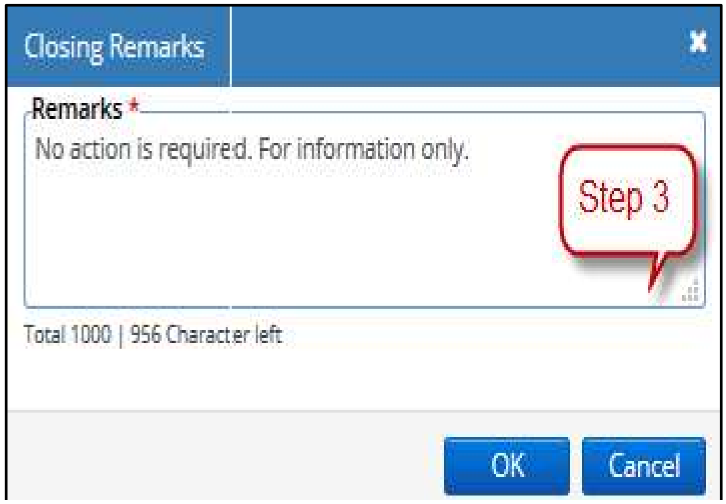



*Figure 142*

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

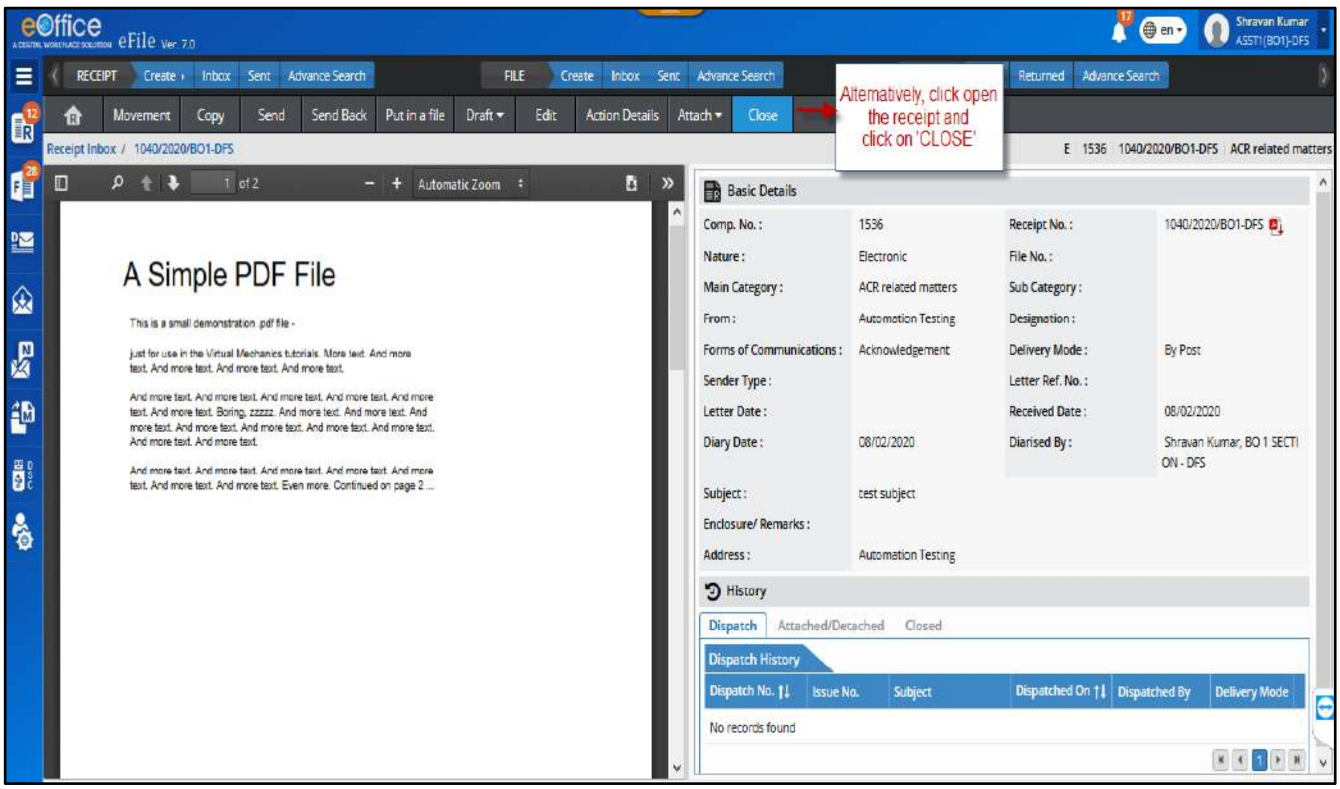



*Figure 143*

# List of Closed Receipts

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

**STEPS TO FOLLOW:**

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

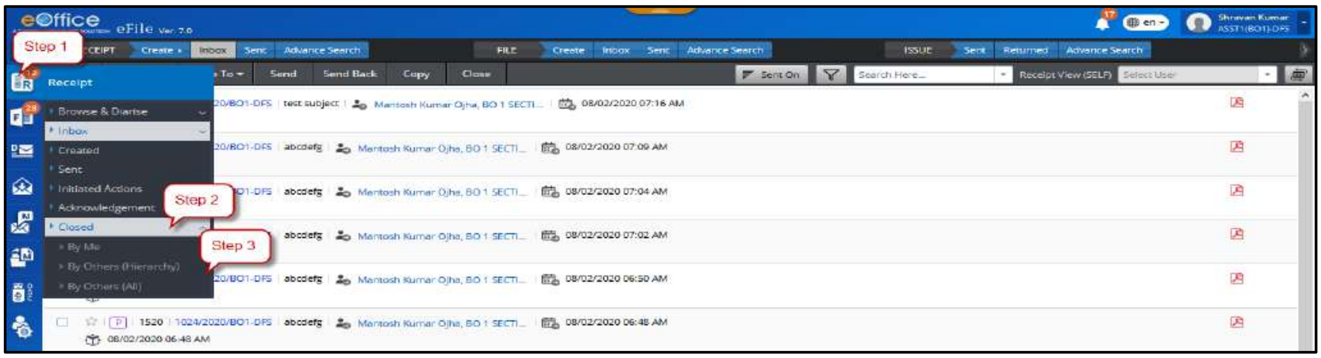



*Figure 144*

### Closed (By Me) –

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

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

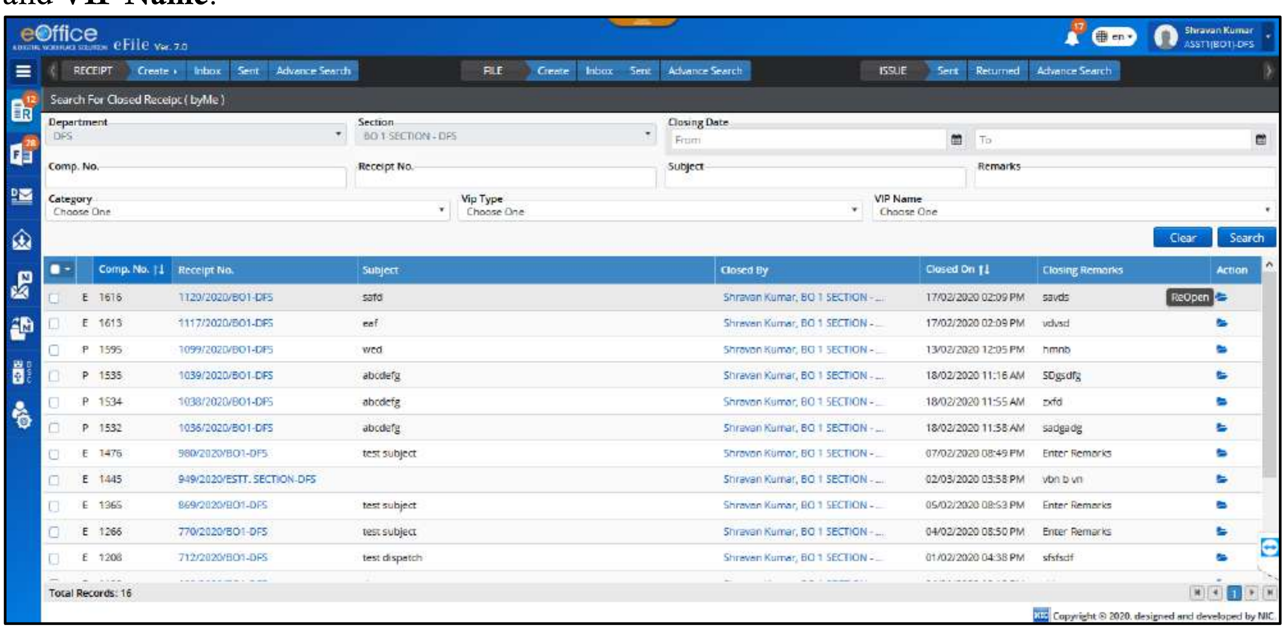



*Figure 145*

### By Others (Hierarchy) –

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

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

### By Others (All)

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

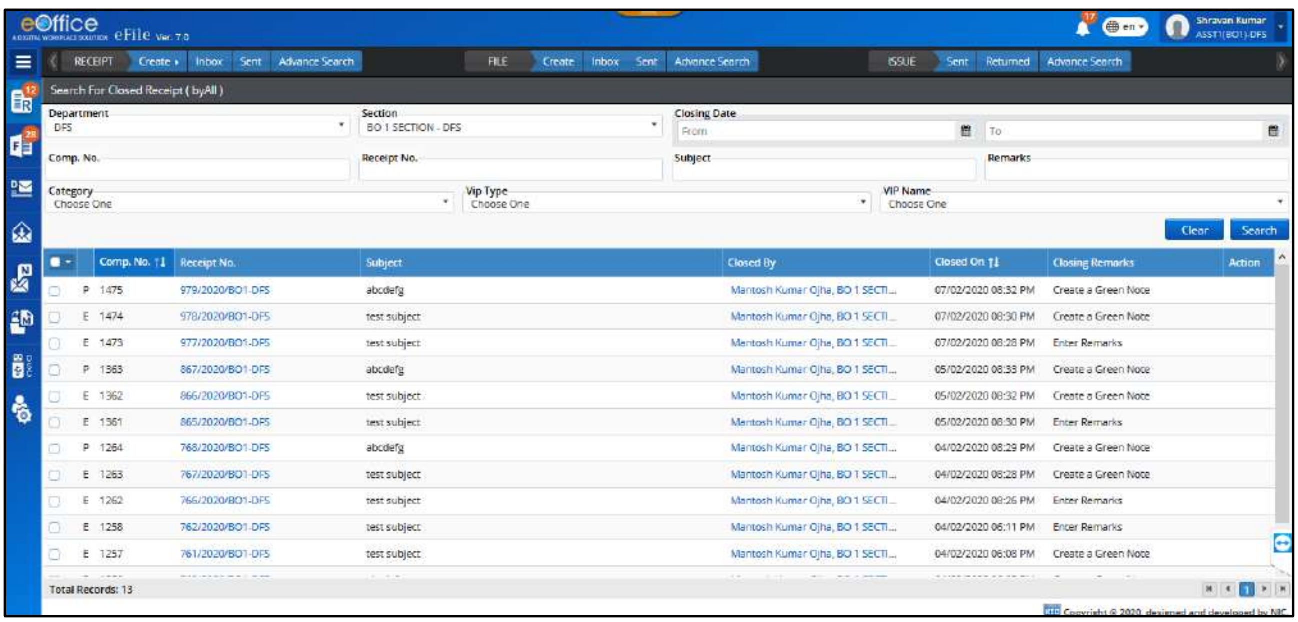



*Figure 146*

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

# Closed Receipt History:

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

## STEPS TO FOLLOW:

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

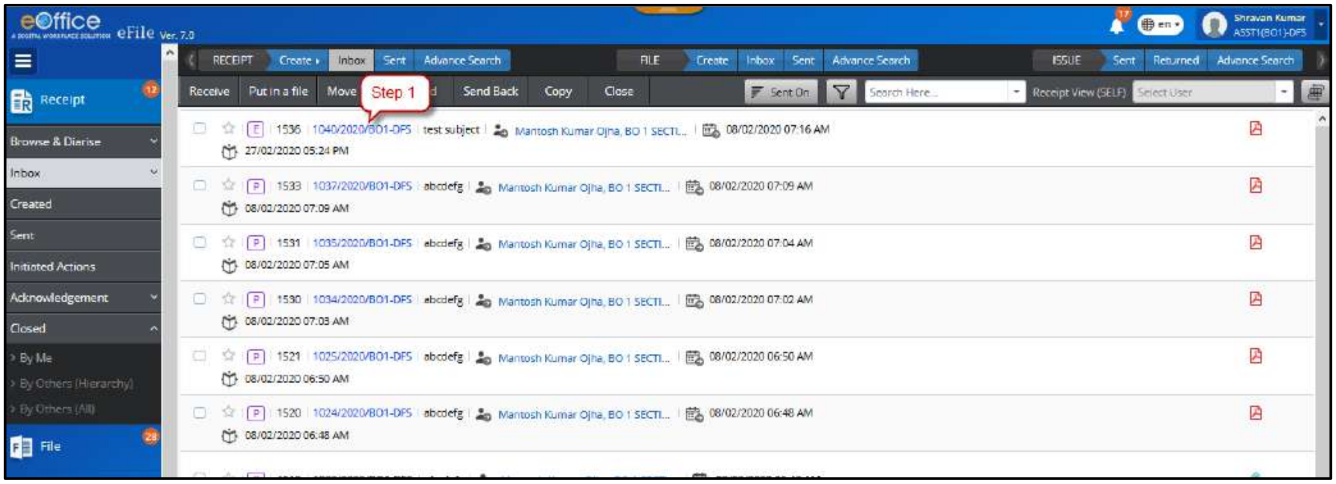



*Figure 147*

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

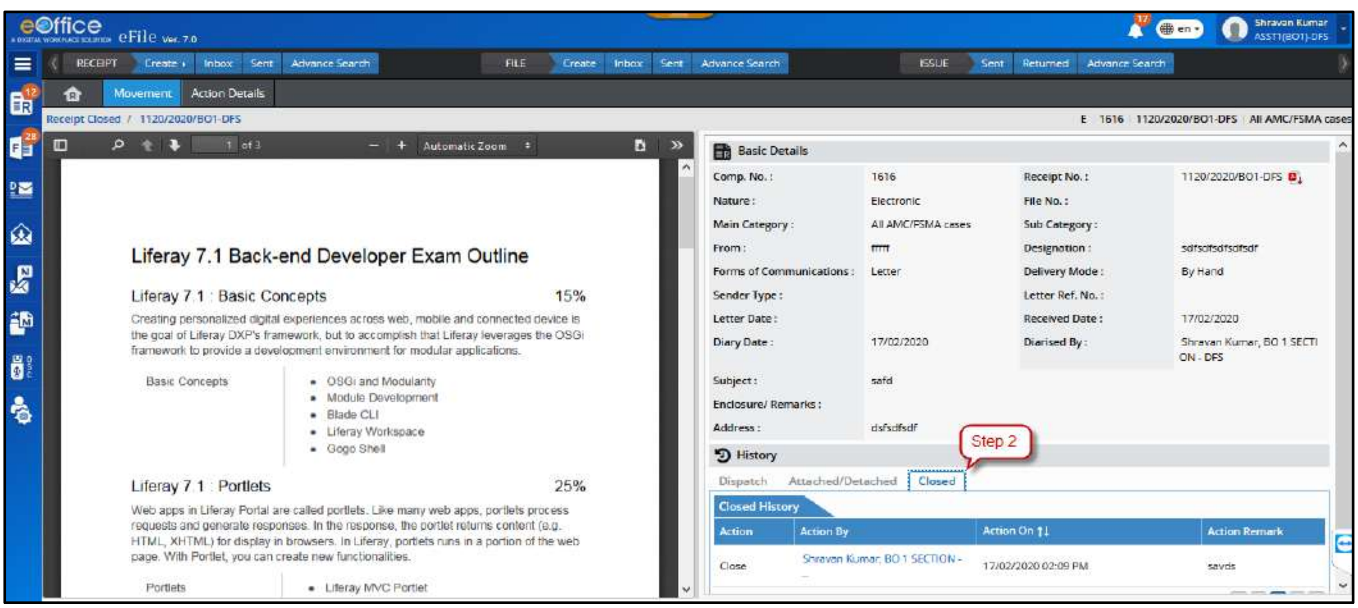



*Figure 148*

**Note:**

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

# Re-opening of Receipts

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

**STEPS TO FOLLOW:**

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

   Or

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

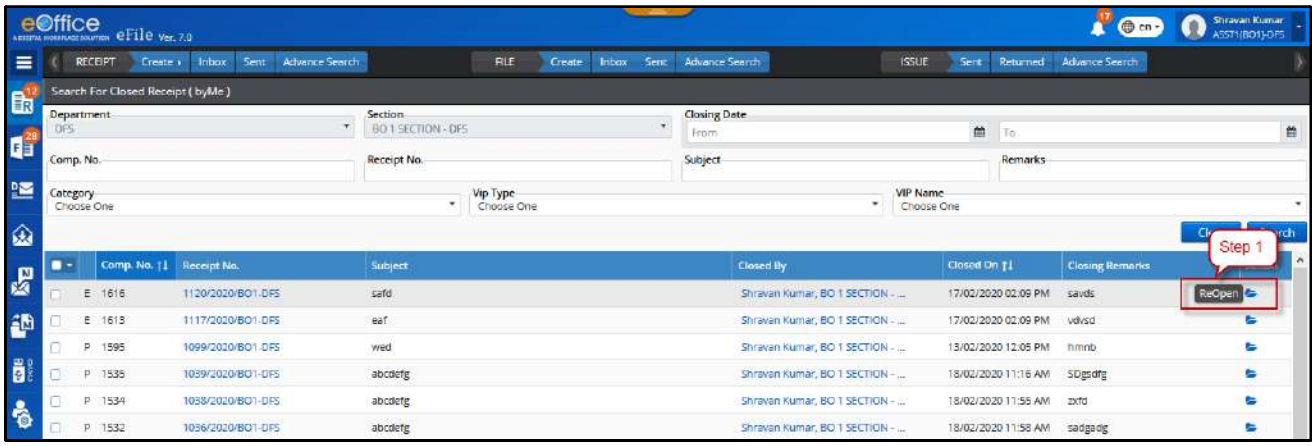



*Figure 149*

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

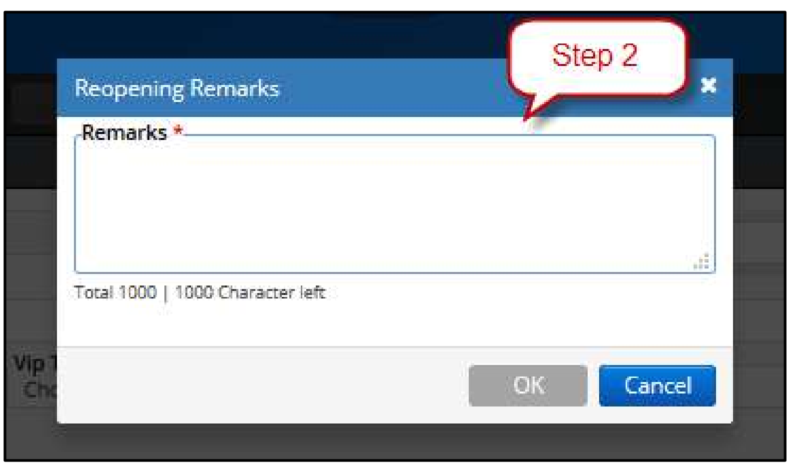



*Figure 150*

**Note:**

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

# Generate Acknowledgement

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

## Generate Acknowledgement

### Generating Acknowledgement while Diarisation

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

**STEPS TO FOLLOW:**

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

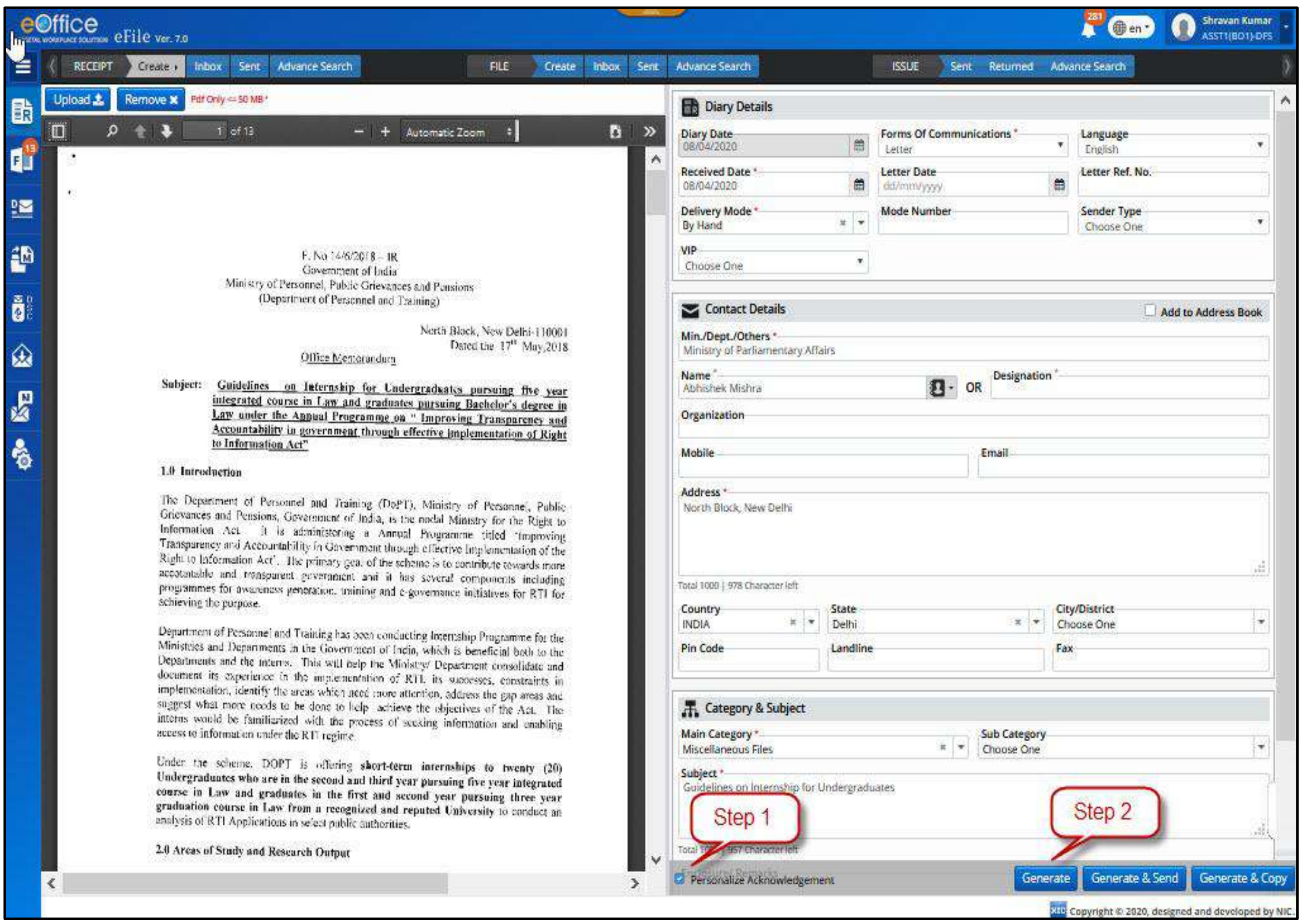



*Figure 151*

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

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

Or

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

3. Prepare the content of the acknowledgement.

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

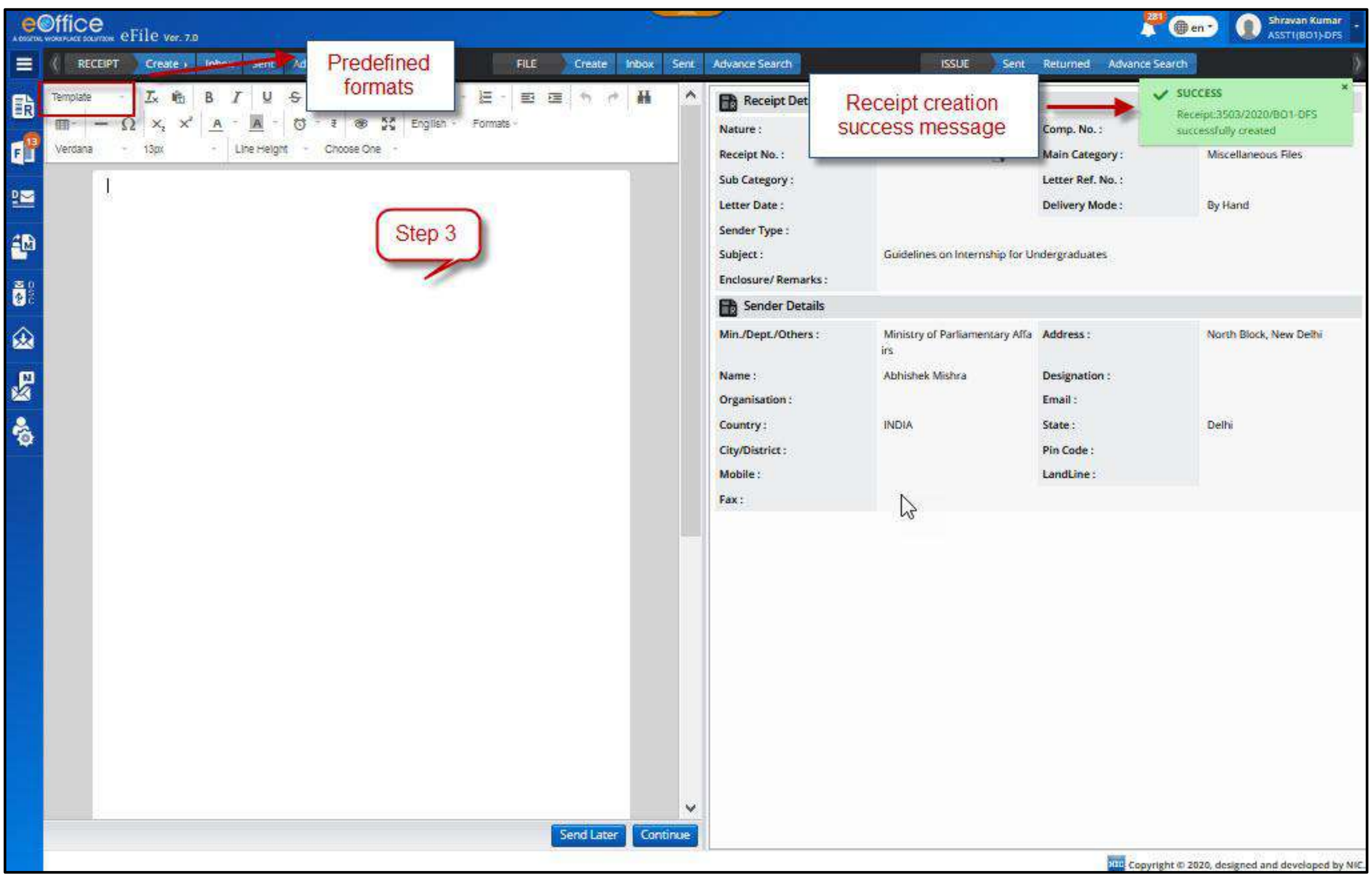



*Figure 152*

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

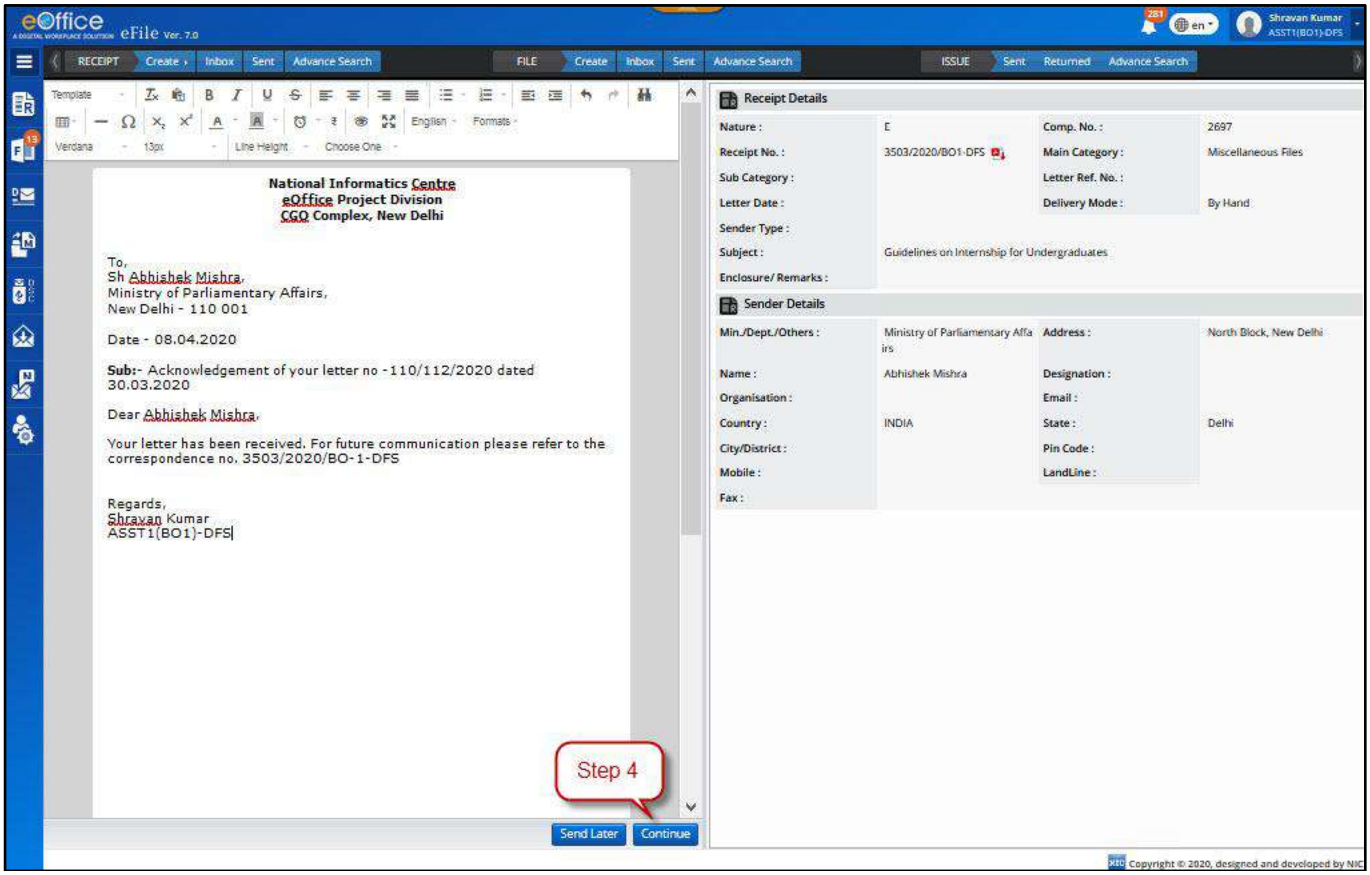



*Figure 153*

## Generating Acknowledgement from Receipt Created/Sent

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

### STEPS TO FOLLOW:

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

**Note:**

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

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

Or

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

# Acknowledgement Created List

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

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

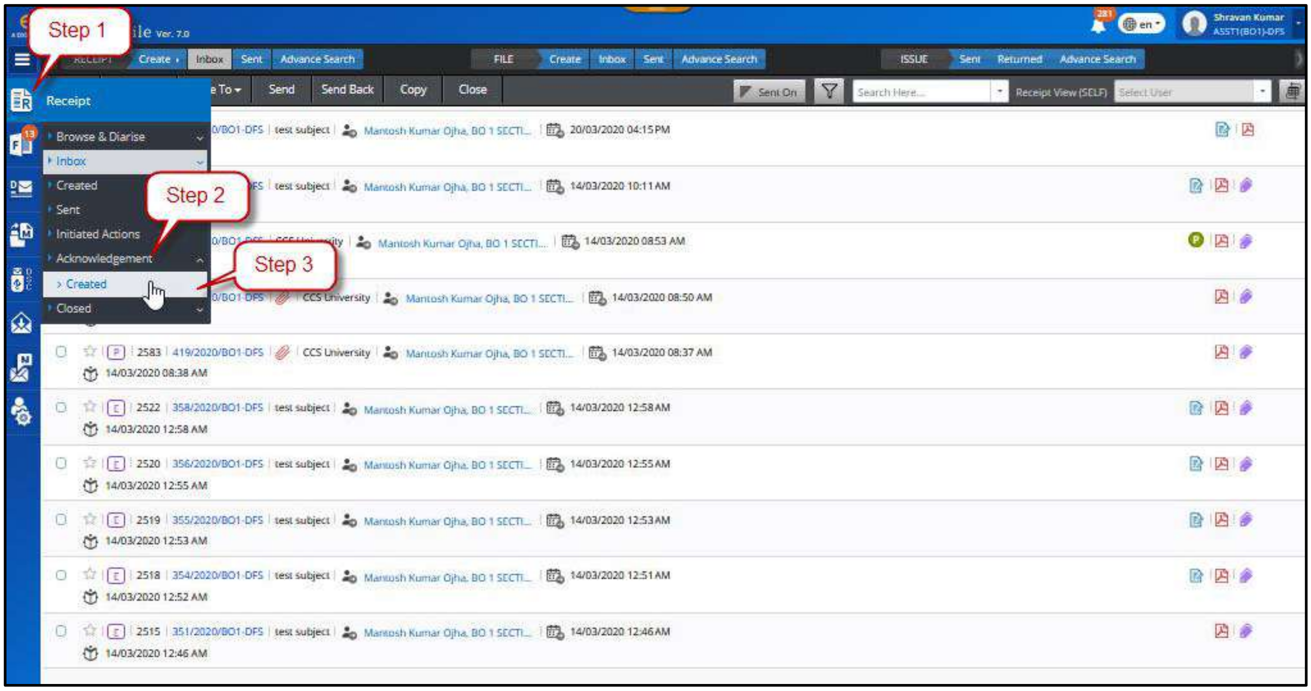



*Figure 154*

## *Description – Acknowledgement Created List*

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

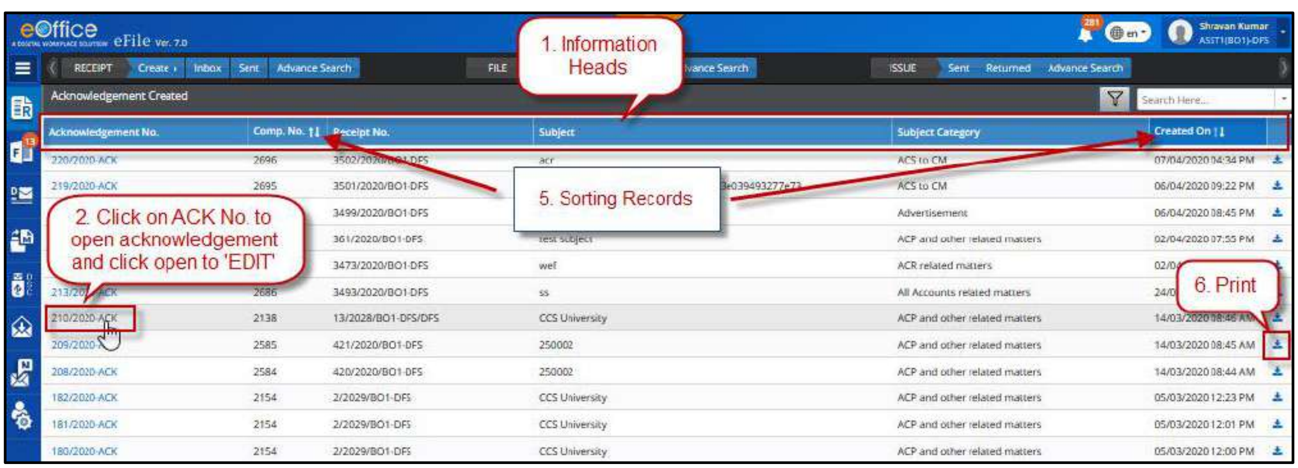



*Figure 155*

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

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

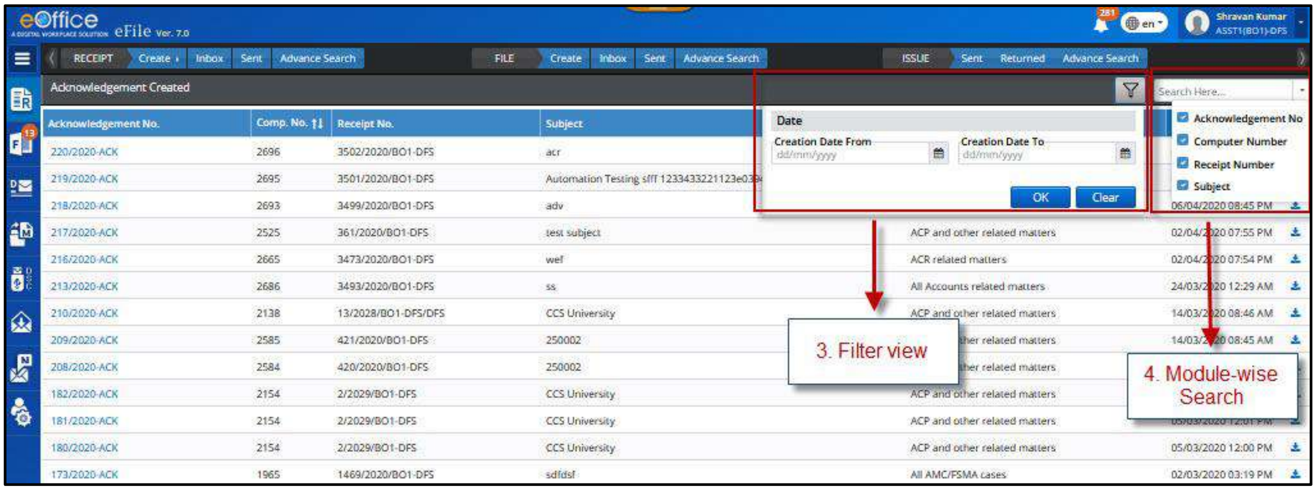



*Figure 156*

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

# Edit Acknowledgement

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

**STEPS TO FOLLOW:**

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

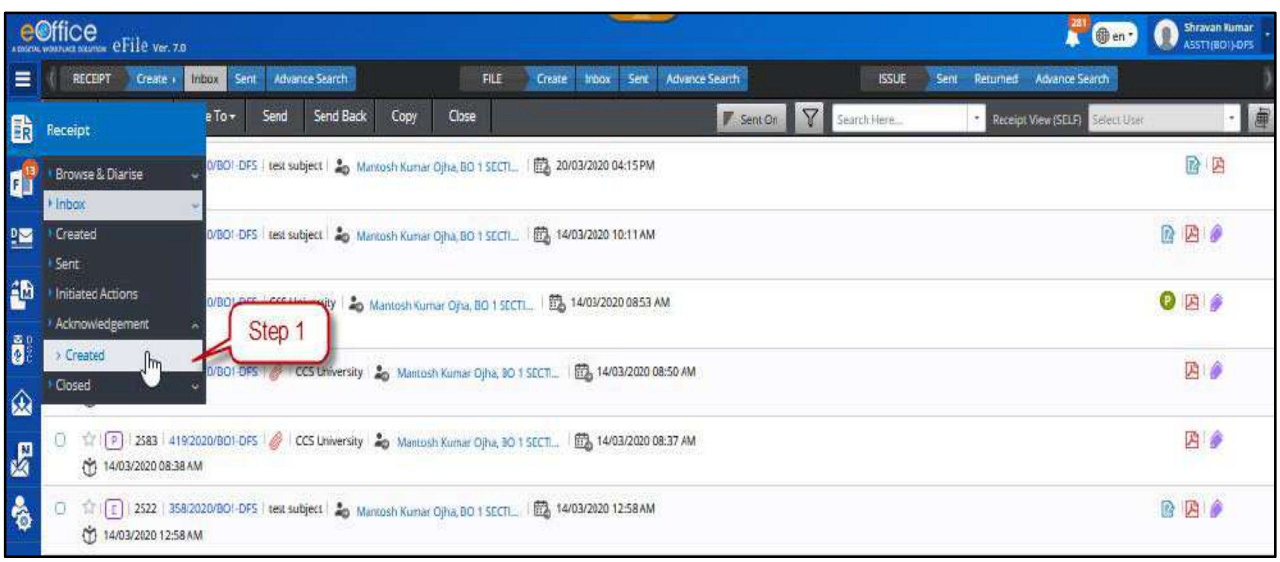



*Figure 157*

2. Click the acknowledgement number, required to edit.

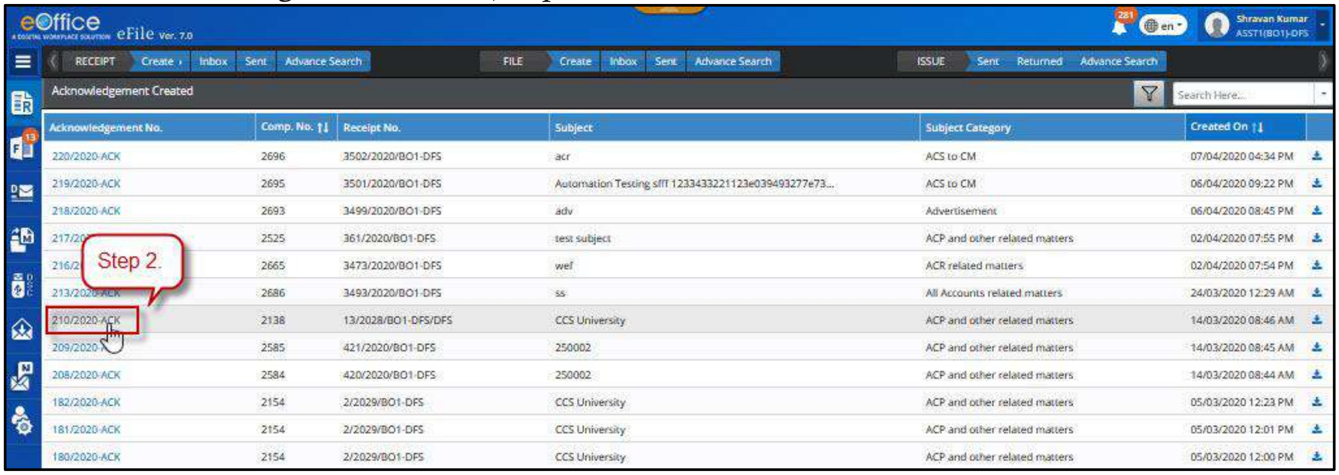



*Figure 158*

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

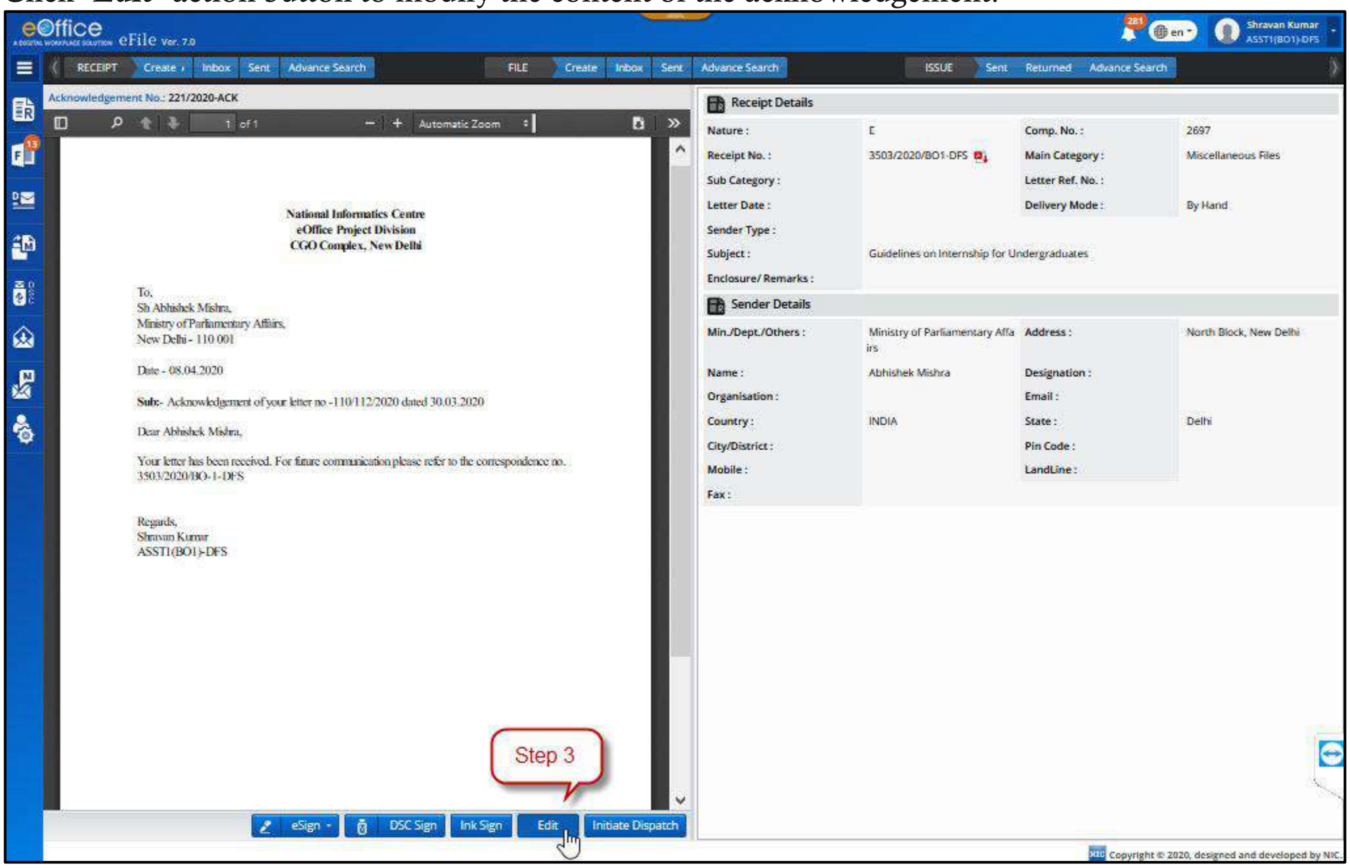



*Figure 159*

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

**Note:**

- A signed acknowledgment cannot be edited.

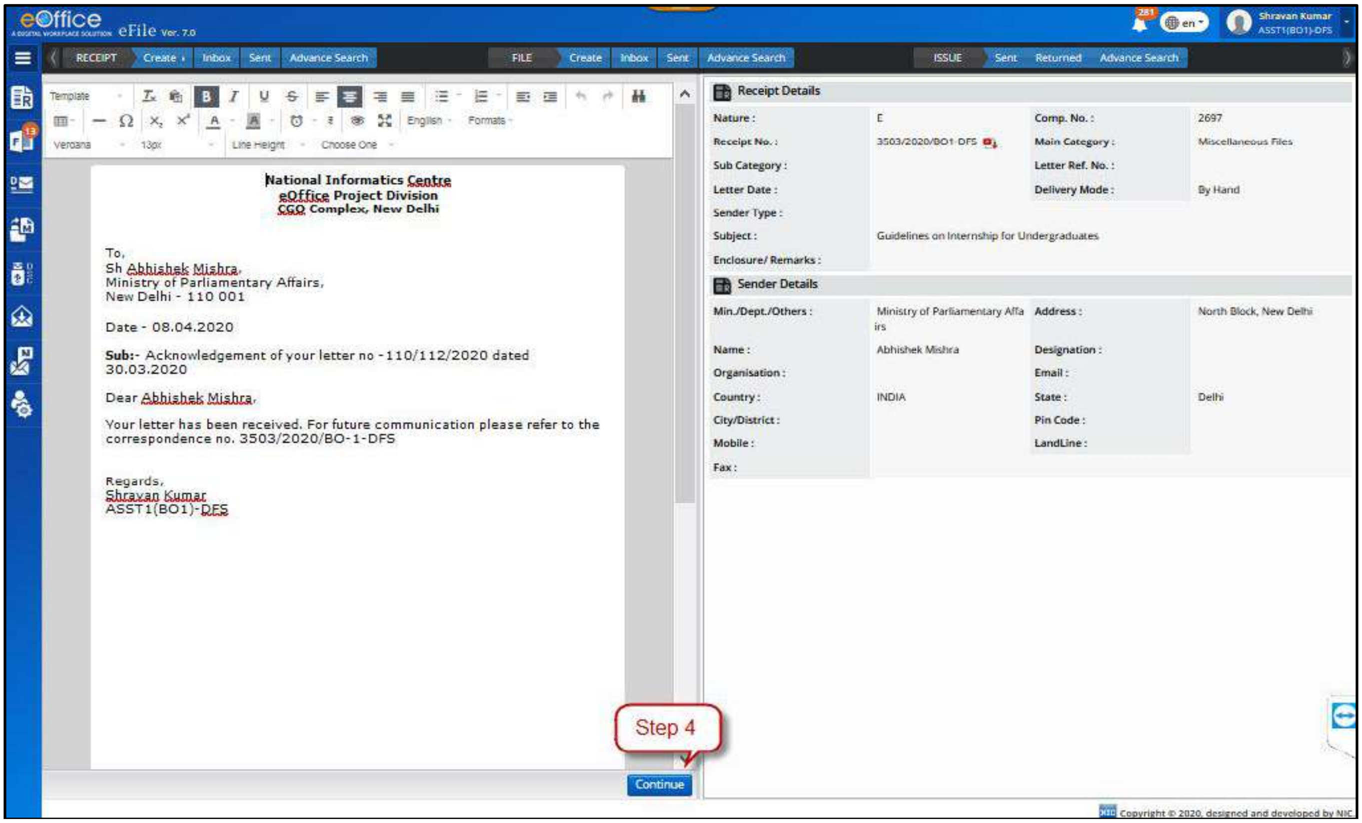



*Figure 160*

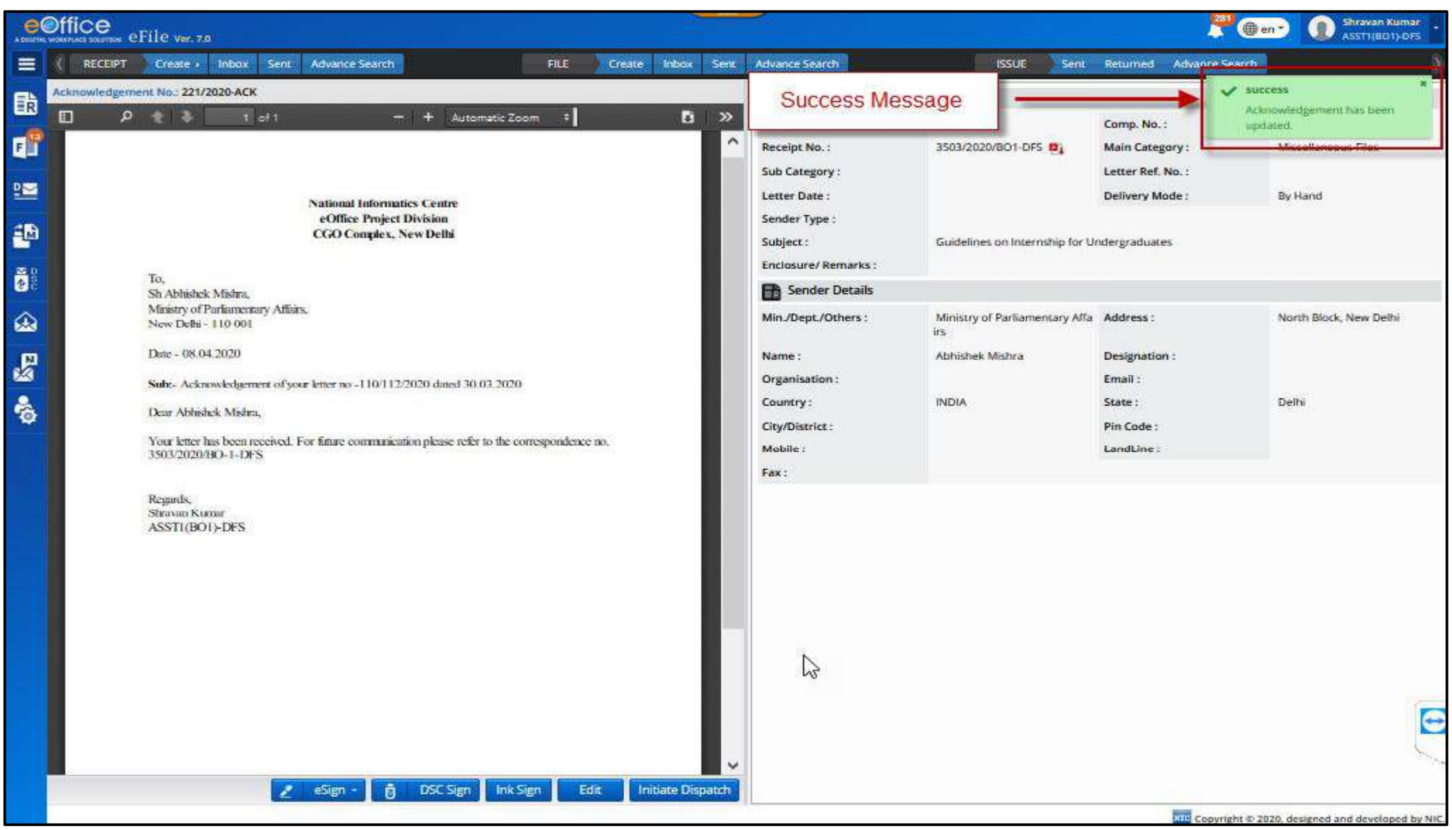



*Figure 161*

# Signing Acknowledgement

The section describes the digital signing process of an acknowledgement.

## DSC SIGN

It is the process of digitally signing using eToken.

**STEPS TO FOLLOW:**

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

## eSign

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

**STEPS TO FOLLOW:**

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

## Ink Sign

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

**STEPS TO FOLLOW:**

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

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

# Send Acknowledgement

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

**STEPS TO FOLLOW:**

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

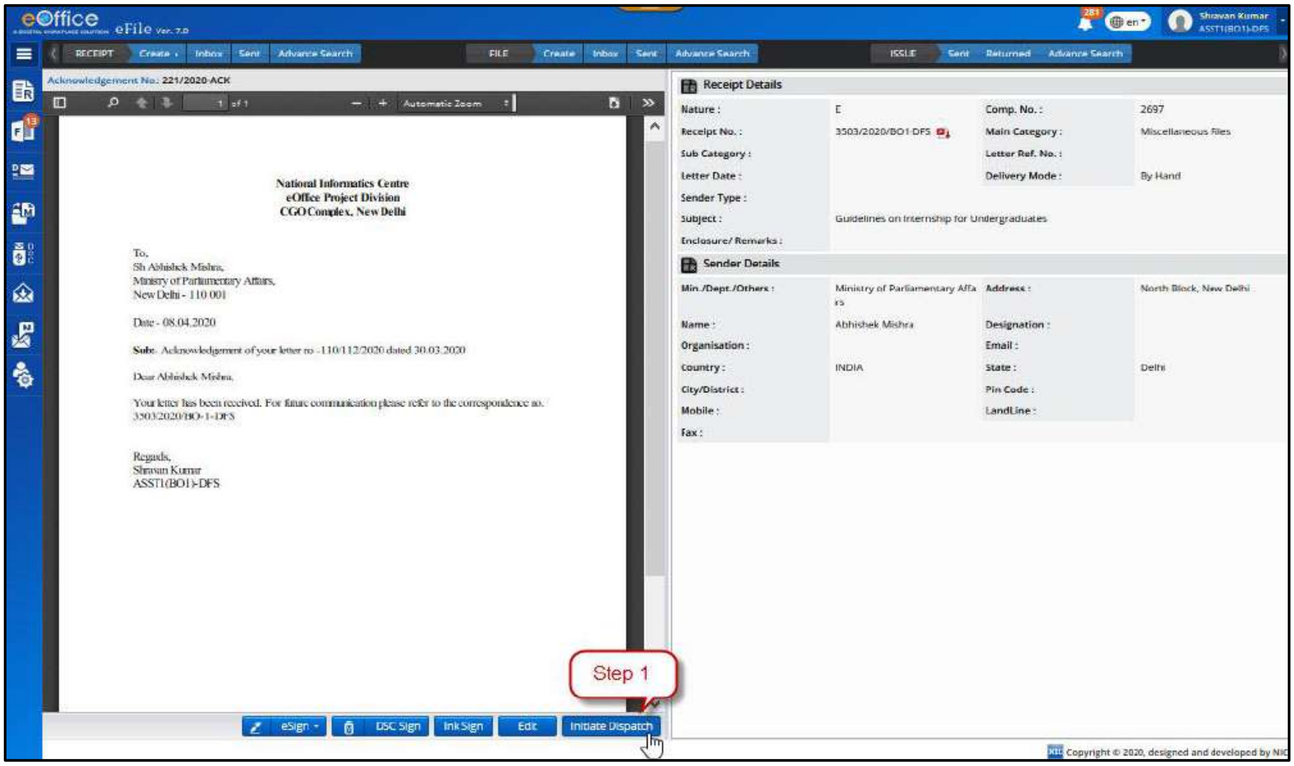


*Figure 162*

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

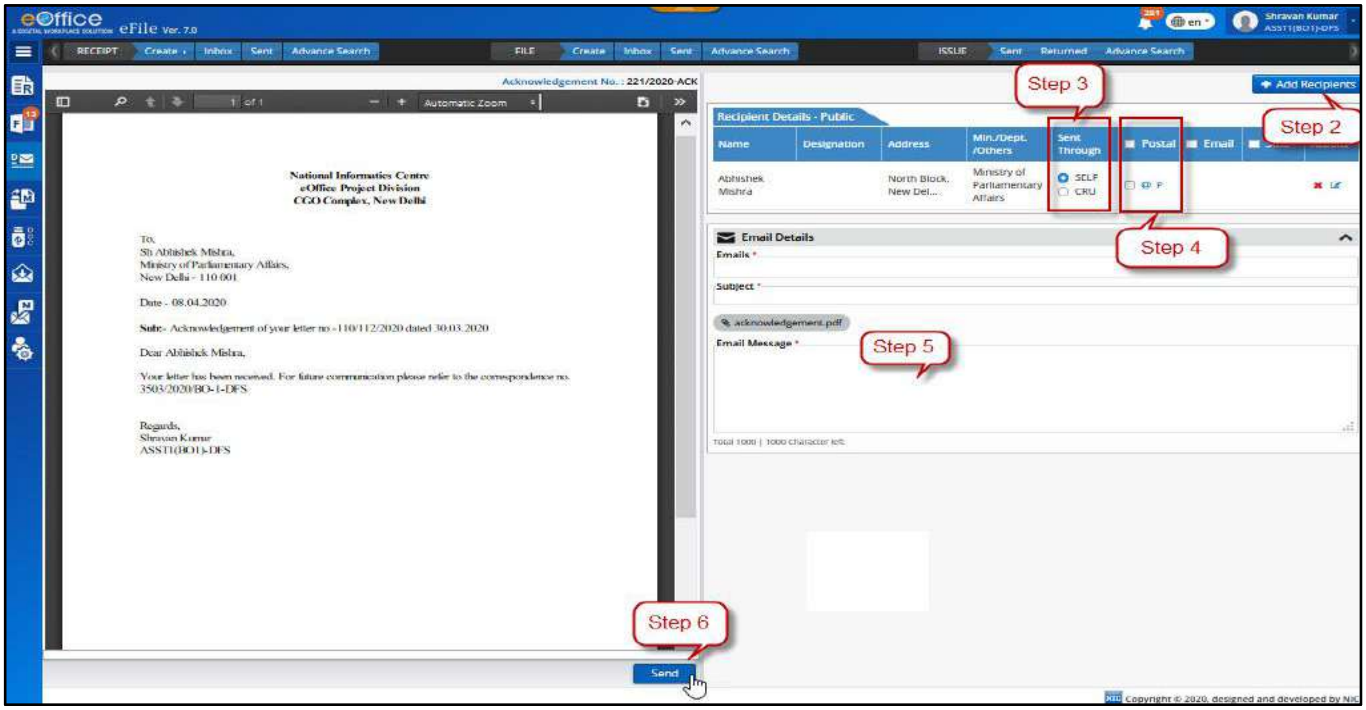



*Figure 163*

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

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

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

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

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

**Note:**

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

4. Enter Delivery Mode -

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

**Note:**

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

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

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

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

**Note:**

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

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

6. Click **Send.**

**Note:**

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

# Consolidated View of Receipt

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

**STEPS TO FOLLOW:**

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

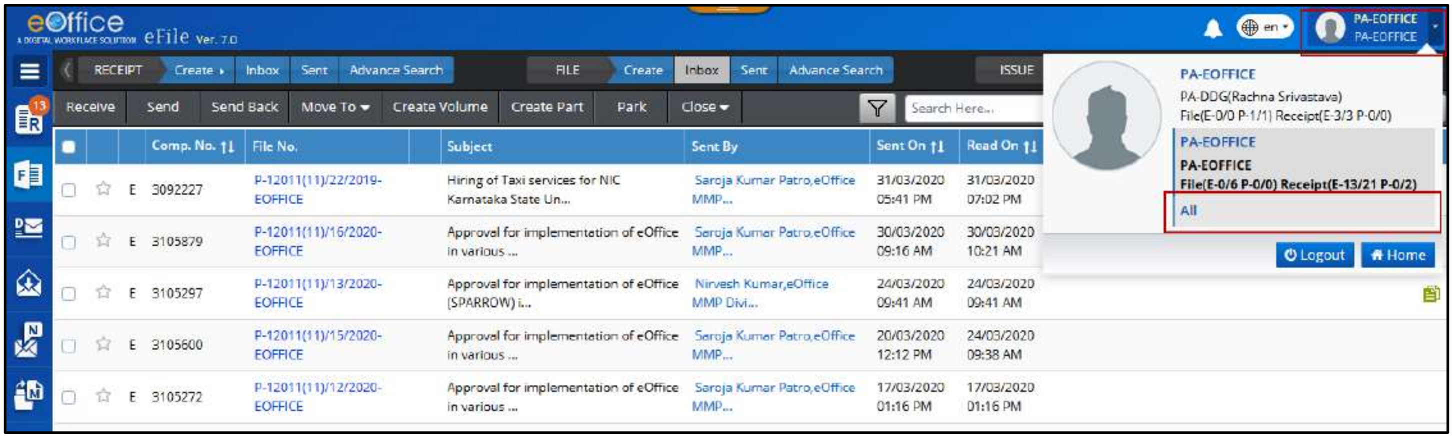



*Figure 164*

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

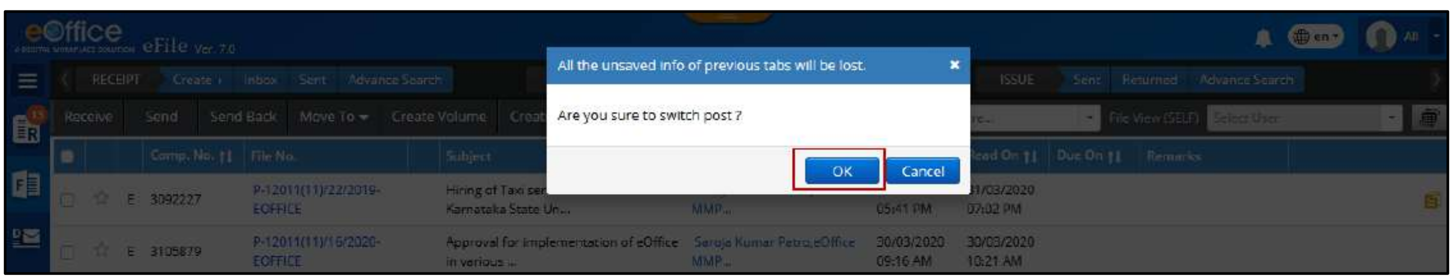



*Figure 165*

## Consolidated Receipt Inbox

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

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

**Note:**

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

## Consolidated Receipt Created List

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

# Consolidated Receipt Sent List

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

# Print/Download Receipt

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

> **Important Points:**
>
> ✓ User must have assigned **Role_DOWNLOADER.**

**STEPS TO FOLLOW:**

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

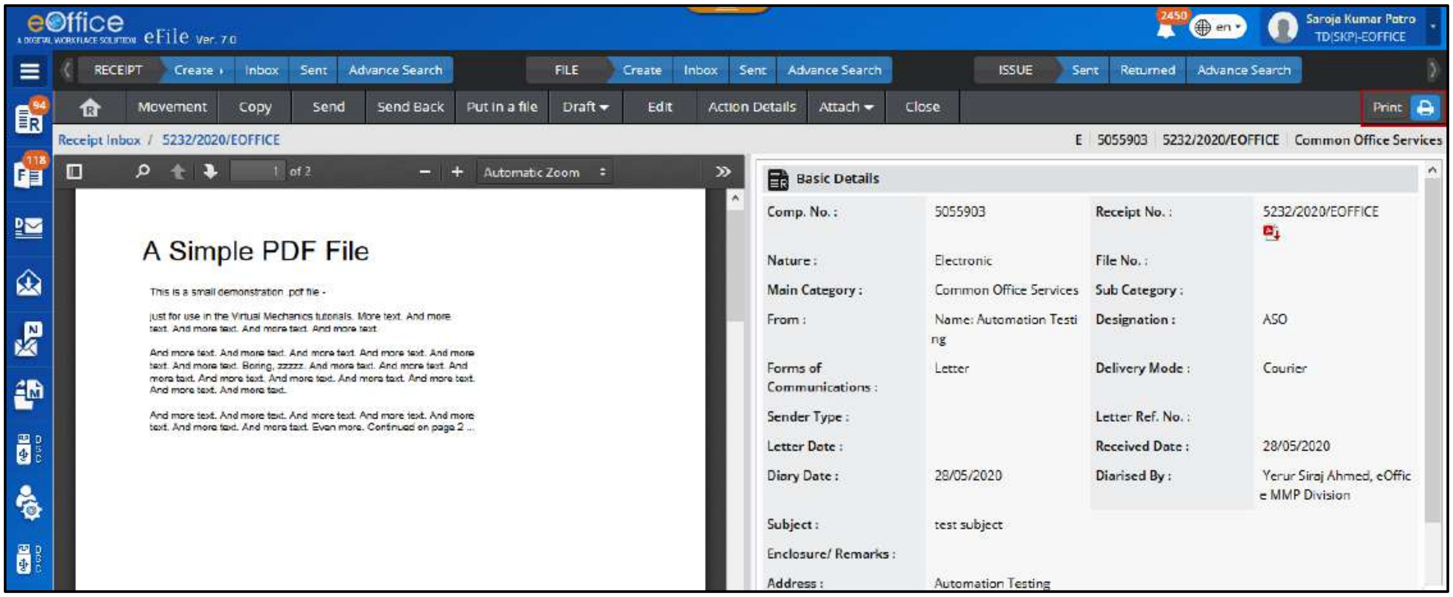



*Figure 166*

2. Select the **Radio** Button (Complete Receipt, Receipt Details, Draft, Issue, Movements History and Action Detail) as per requirement.
3. Select **Customize** button (if required) to download selected content of Complete Receipt, Draft, Issue, Movements History and Action Detail.
4. Click **Preview** Button to view selected content. (*If Required*)
5. Click **Download** Button.

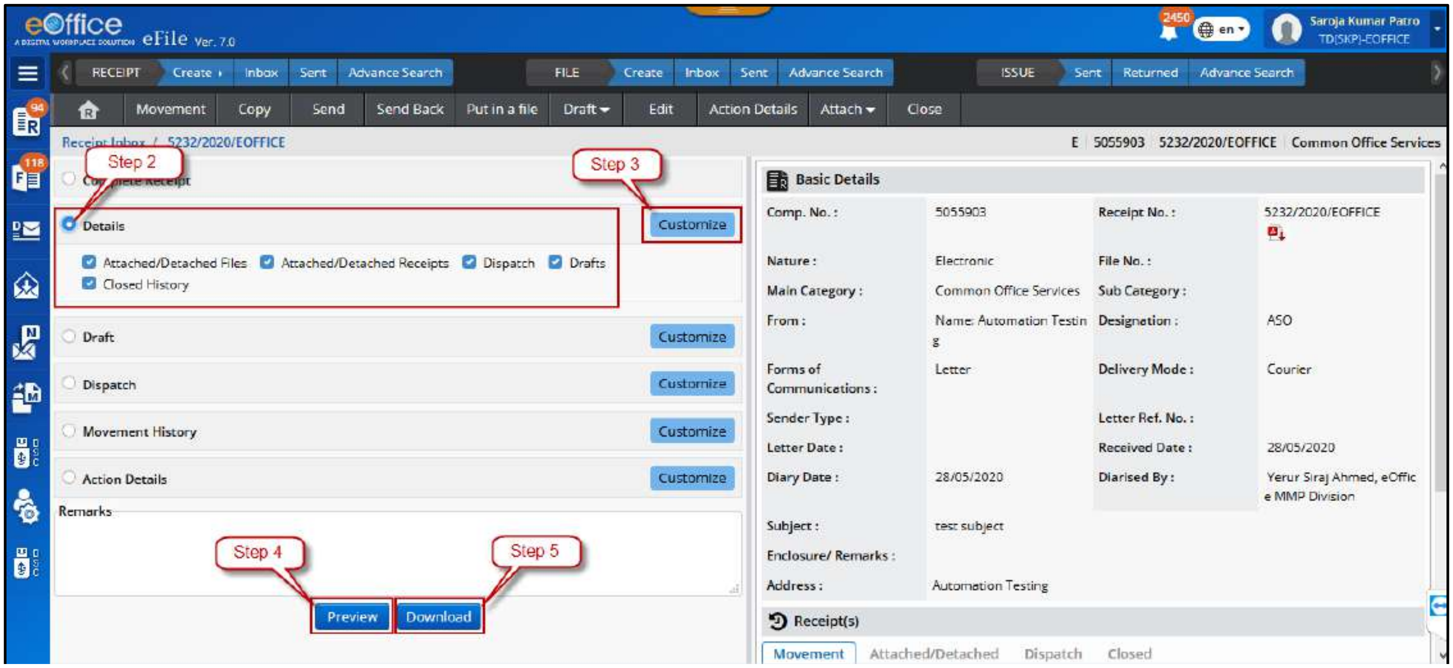



*Figure 167*

**Note:**

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

# Advance Search for Receipt

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

## Important Points:

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

## Steps to Follow:

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

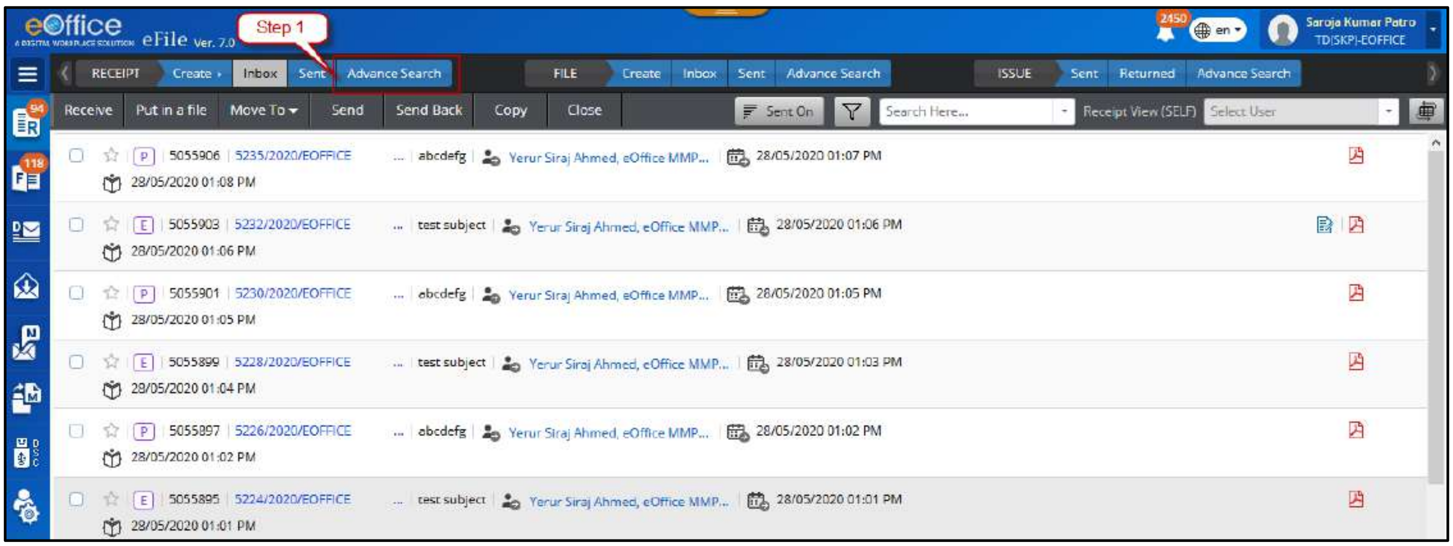



*Figure 168*

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

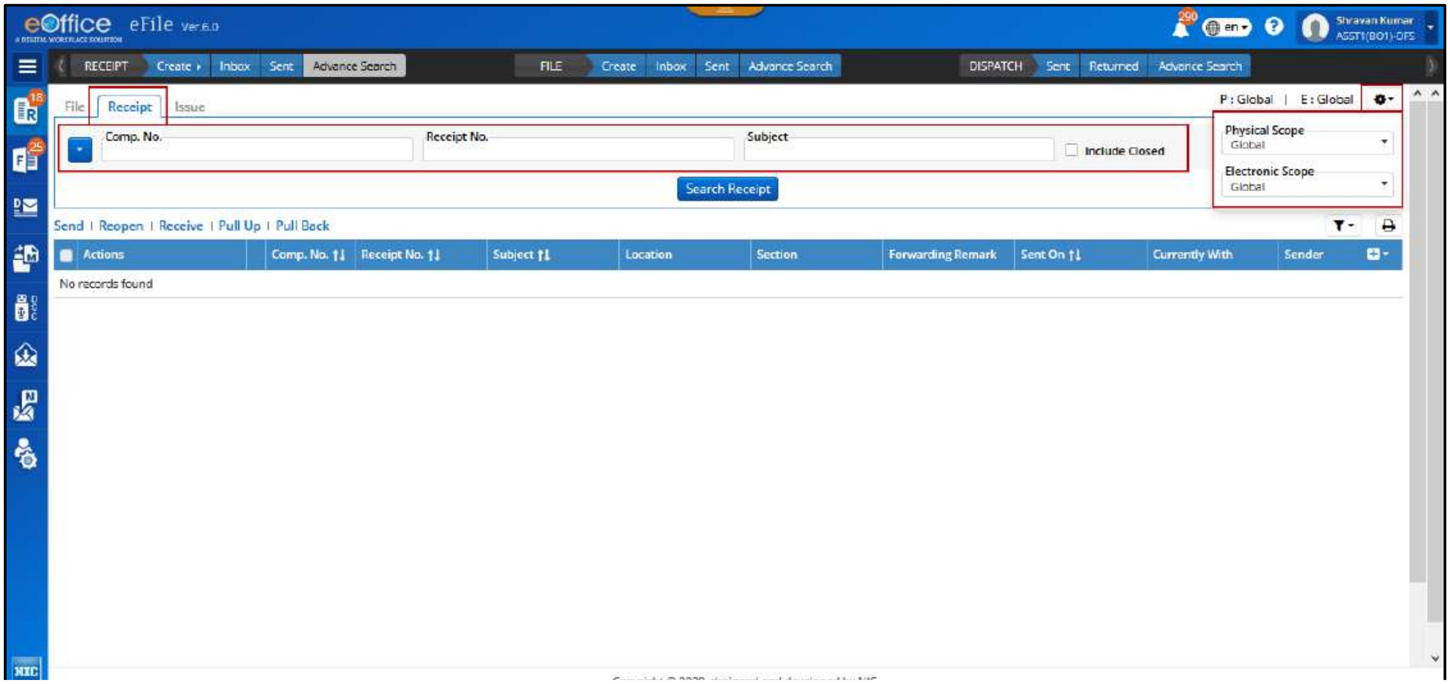



*Figure 169*

3. Search from main **Basic parameters** (*Computer no., Receipt No. or Subject*).**Figure 169**
4. Select **Additional parameters** from dropdown list icon to search with additional inputs. (*Received/Sent, Diary Detail and Sender Detail*)

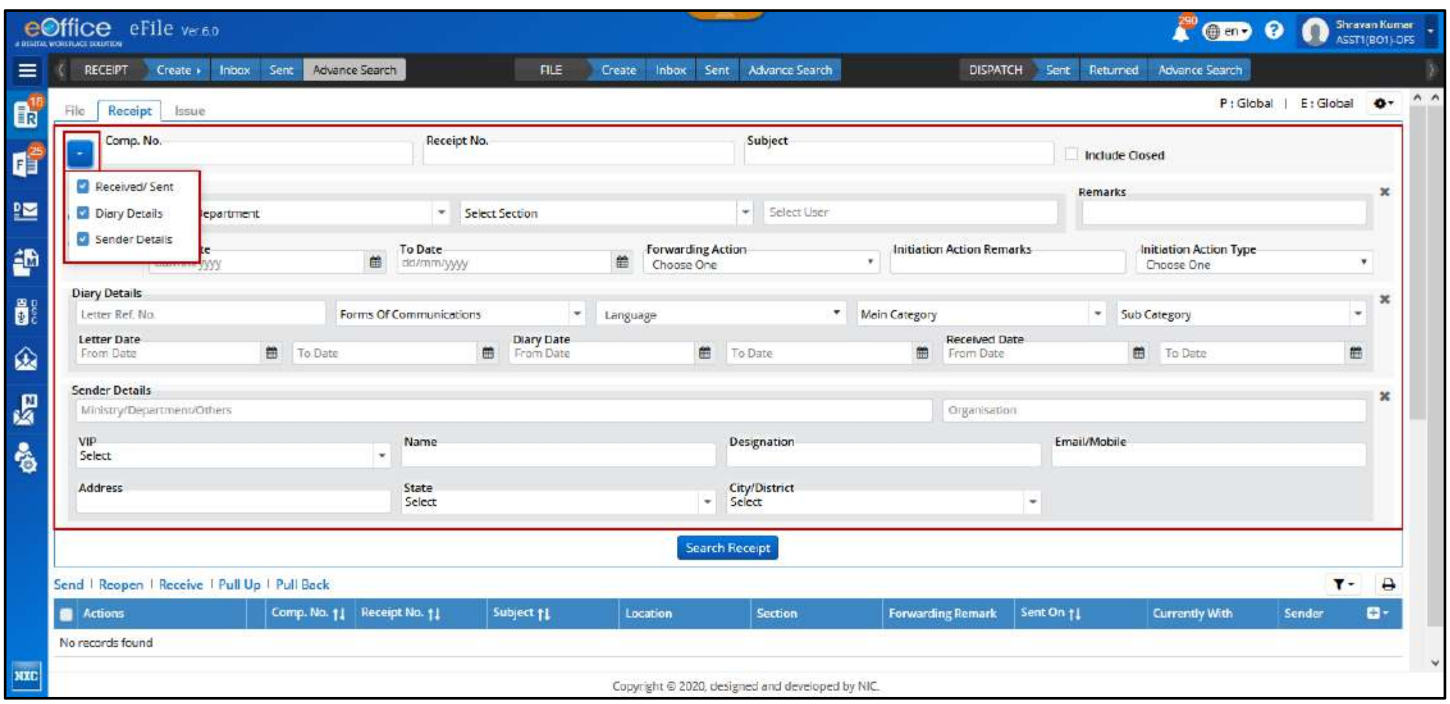



*Figure 170*

5. Click **Search Receipt** button to search the receipt records.
6. Opt for default output fields or **Select/Remove** output fields. (*Computer No., Receipt No. and Subject cannot be removed*)

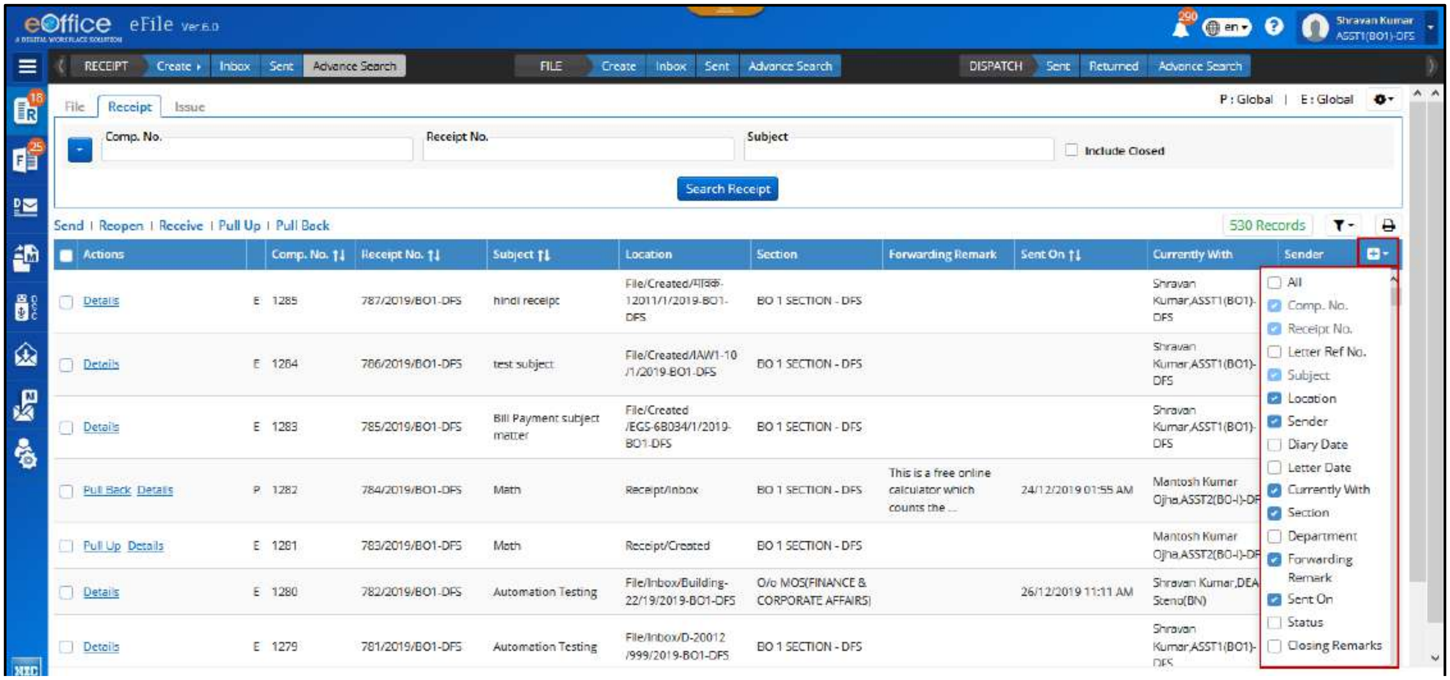



*Figure 171*

**Note:**

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

## Actions Allowed on Searched Receipt

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

  **Note:**

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

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

  **Note:**

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

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

**Note:**

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

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

**Note:**

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

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

**Note:**

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

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

# File

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

## Create a new File

### STEPS TO FOLLOW:

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


*Figure 172*

**Note:**

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

# IMPORTANT POINTS:

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

## Created File List

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

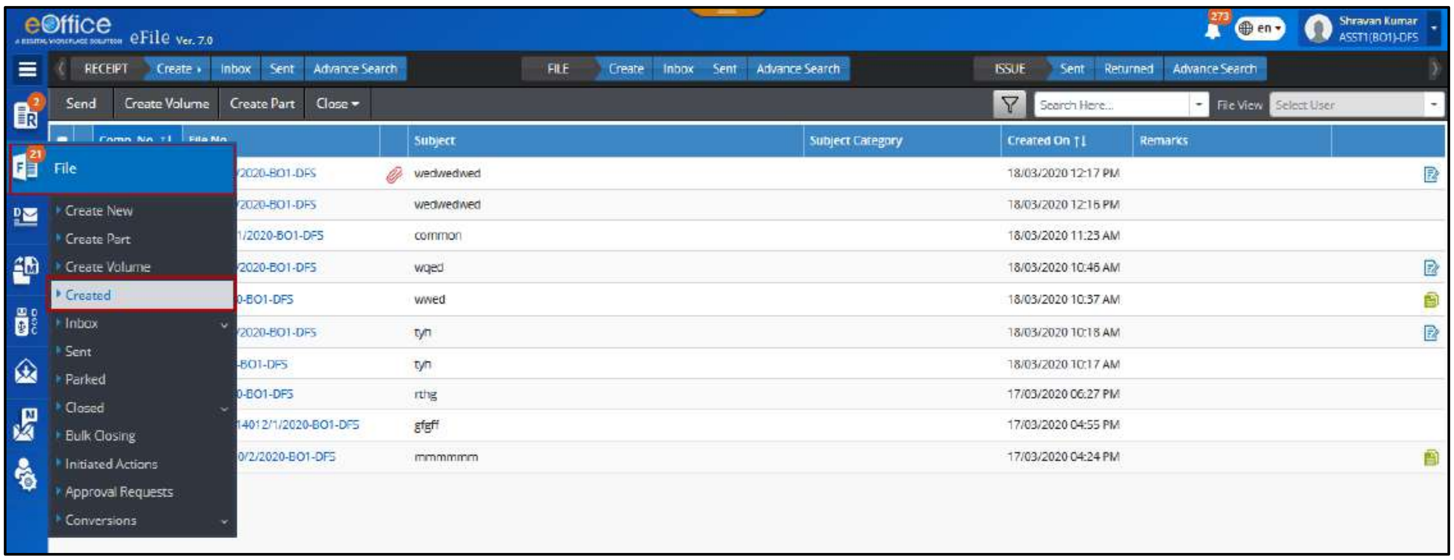



*Figure 173*

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

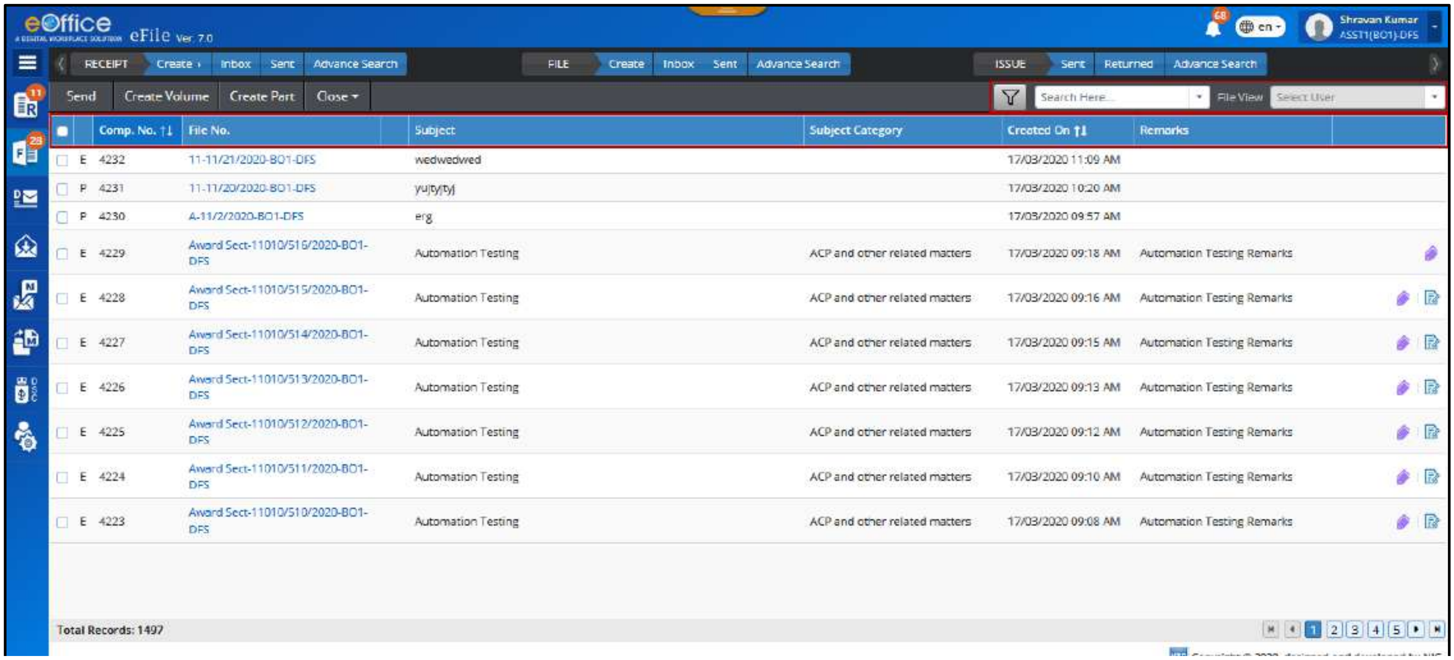



*Figure 174*

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

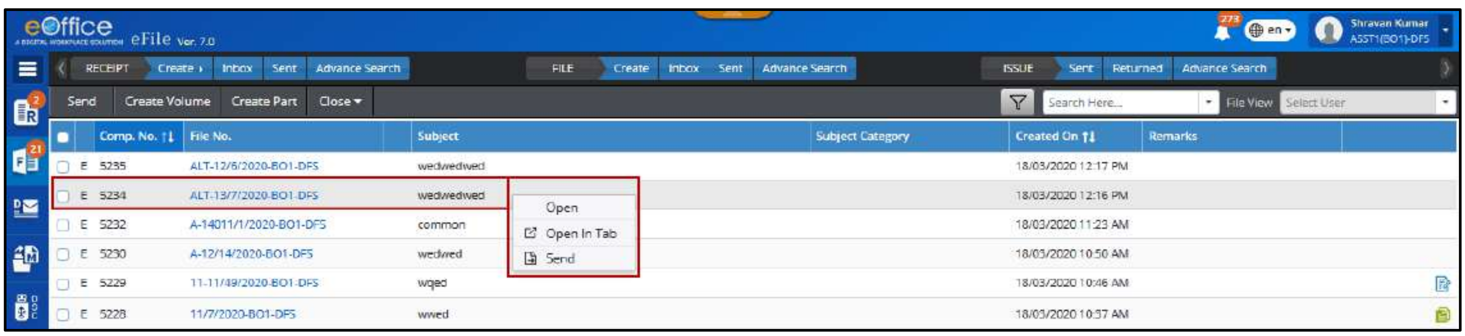



*Figure 175*

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

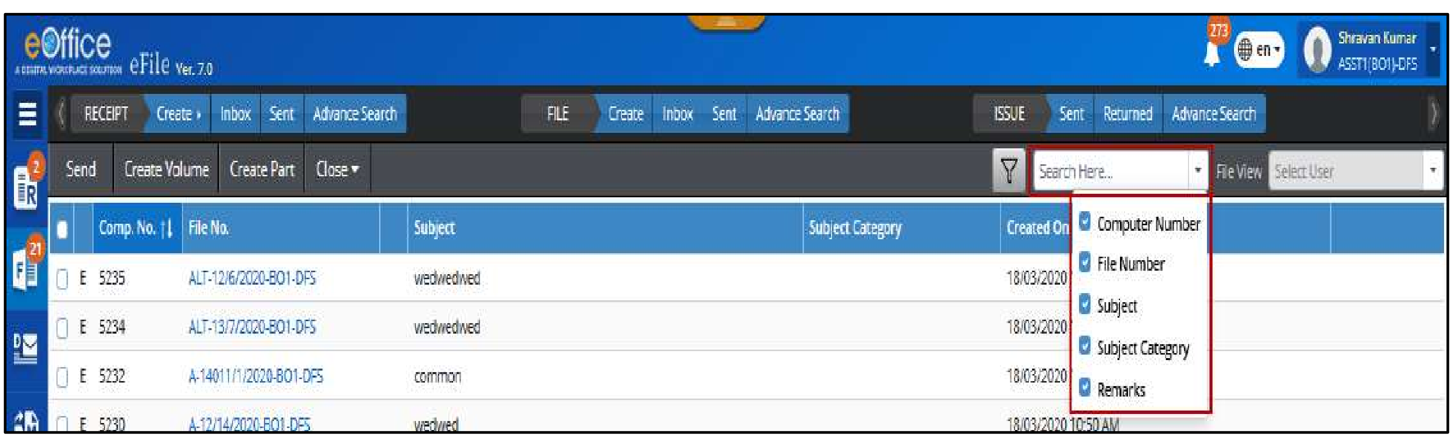



*Figure 176*

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

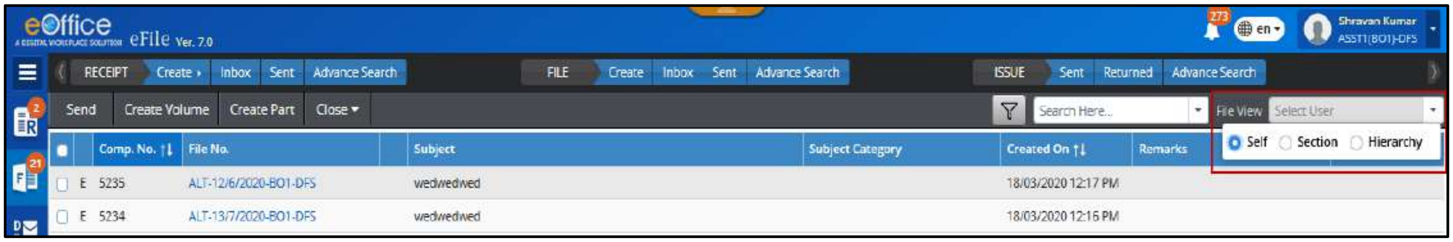



*Figure 177*

**Note:**

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

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

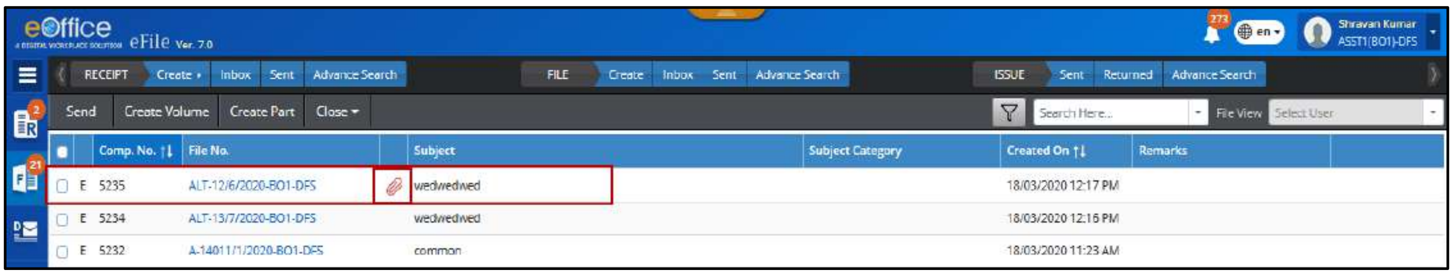



*Figure 178*

**Note:**

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

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

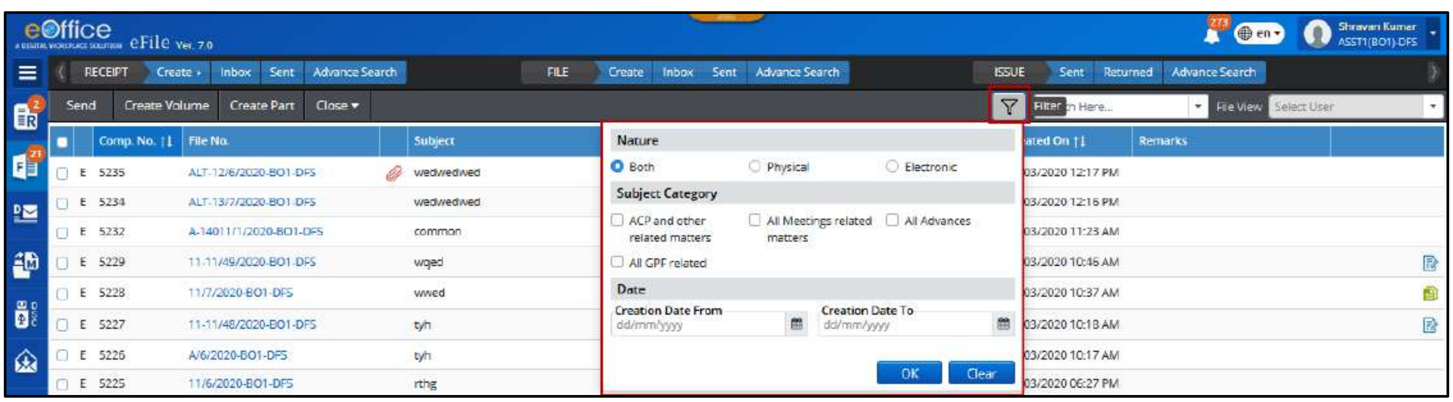



*Figure 179*

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

# File Inbox

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

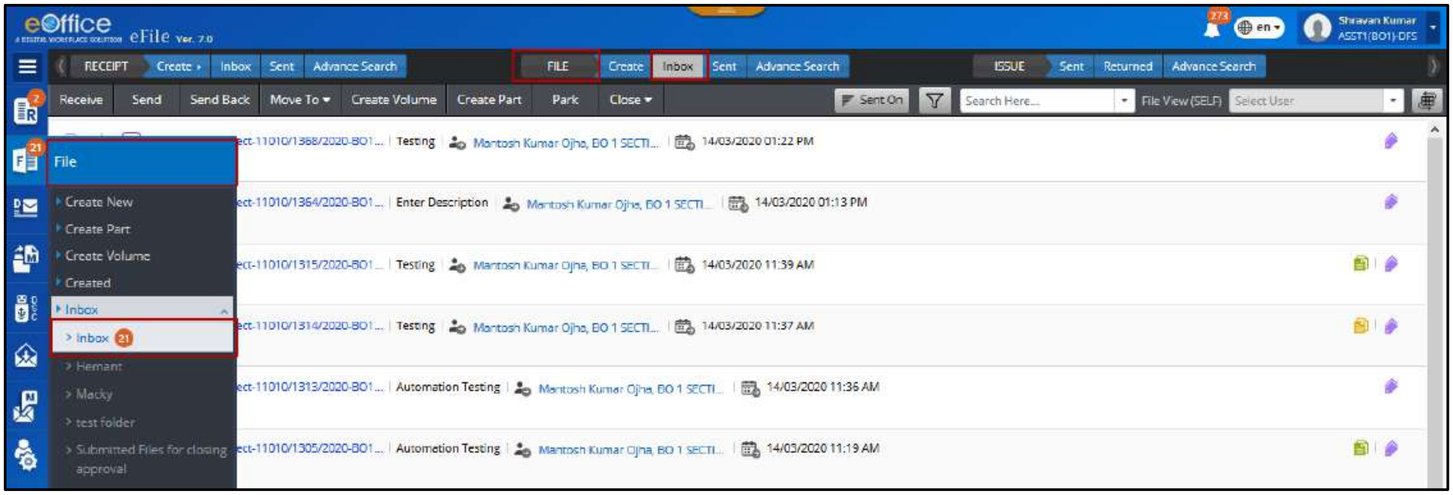



*Figure 180*

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


*Figure 181*

**Note:**

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

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


*Figure 182*

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

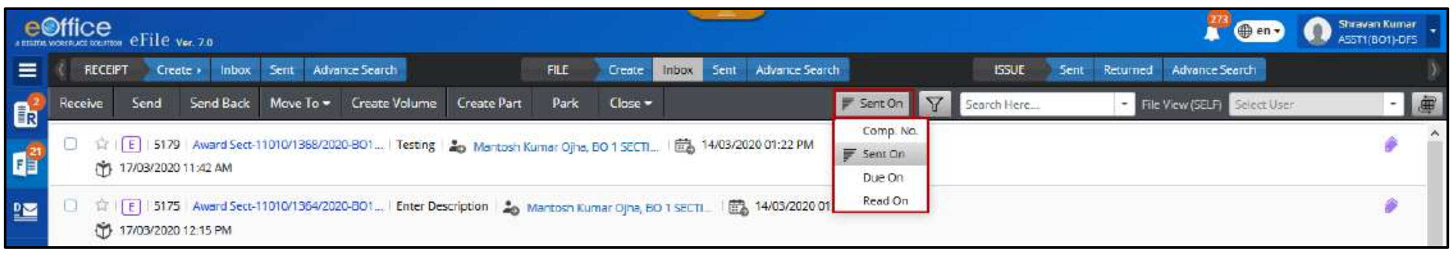



*Figure 183*

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

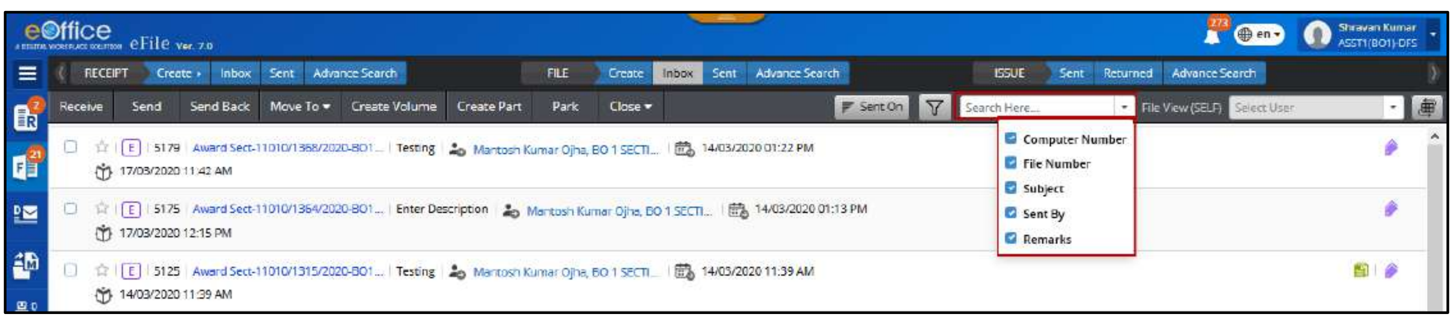



*Figure 184*

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

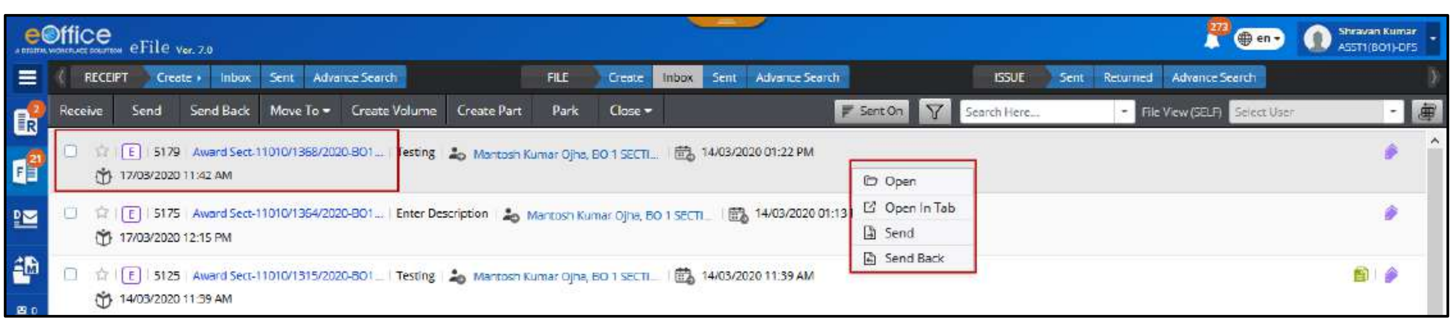



*Figure 185*

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

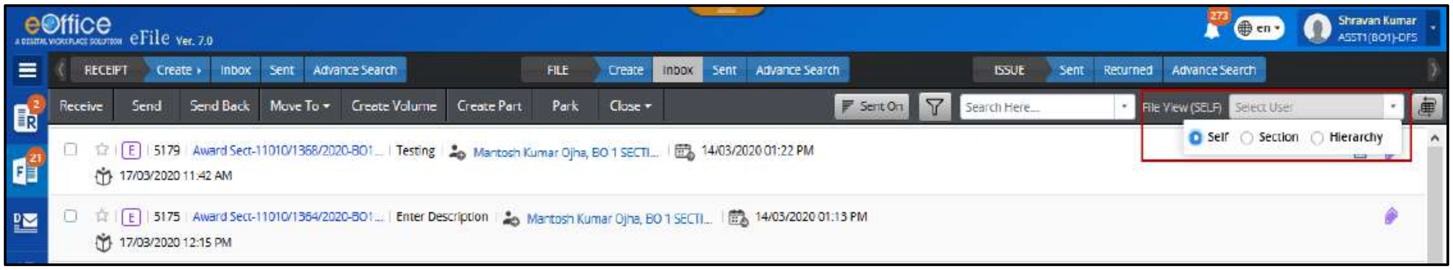



*Figure 186*

**Note:**

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

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

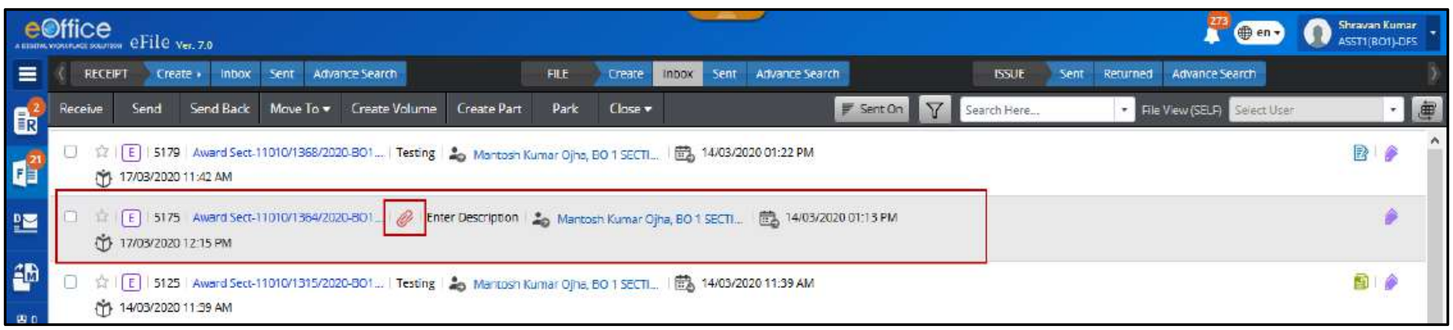



*Figure 187*

**Note:**

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

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

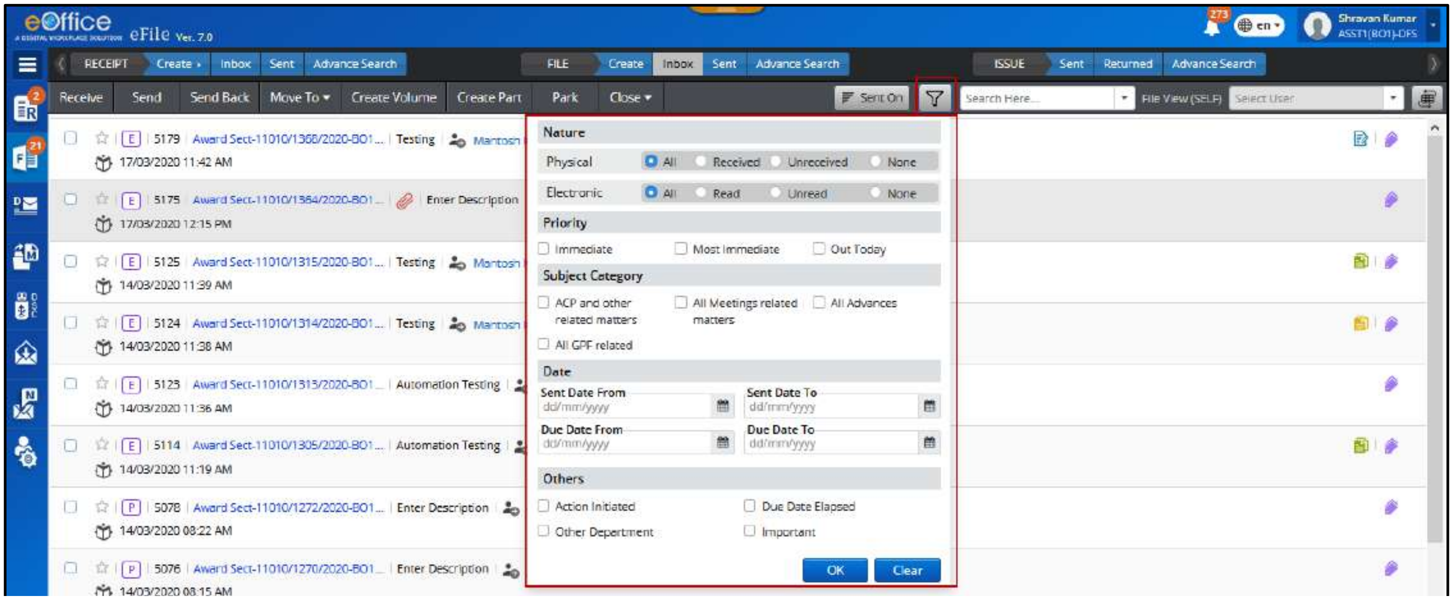


*Figure 188*

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

# Move File to Folder of Inbox

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

**STEPS TO FOLLOW:**

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

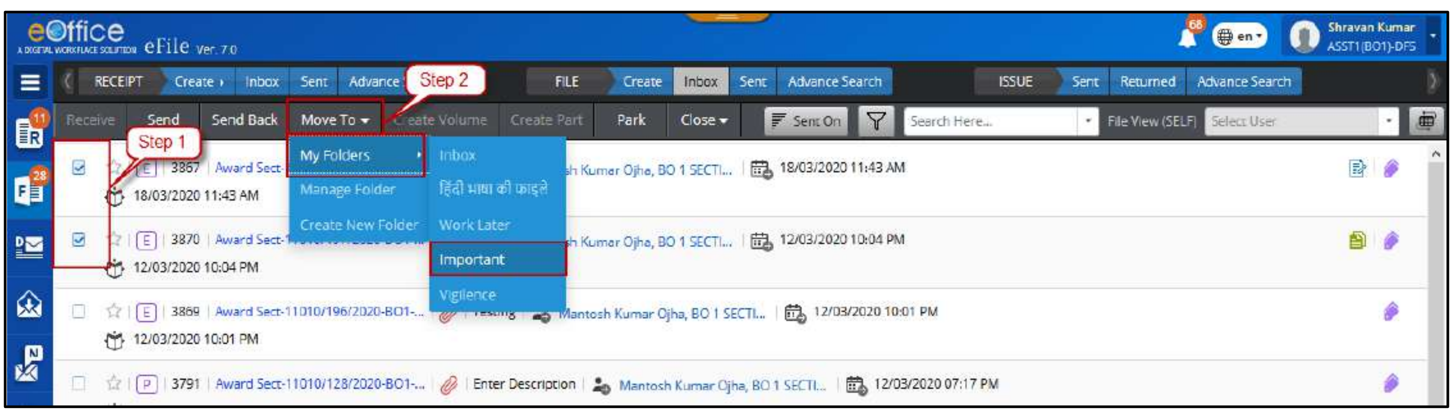



*Figure 189*

**Note:**

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

# Electronic File Inner Page

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

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

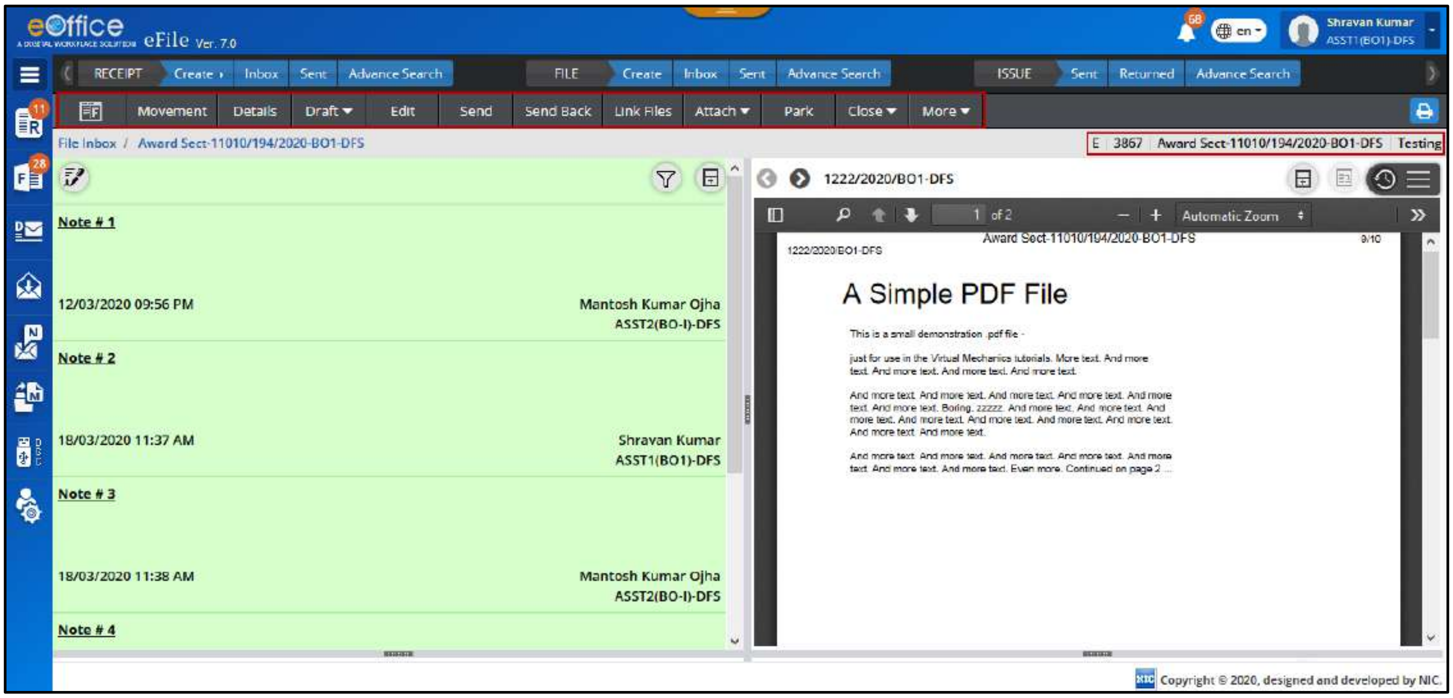



*Figure 190*

## Actions on File Inner Page

### *Actions on Menu Bar*

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

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

**Note:**

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

## *Actions on Left Panel (Noting Panel)*

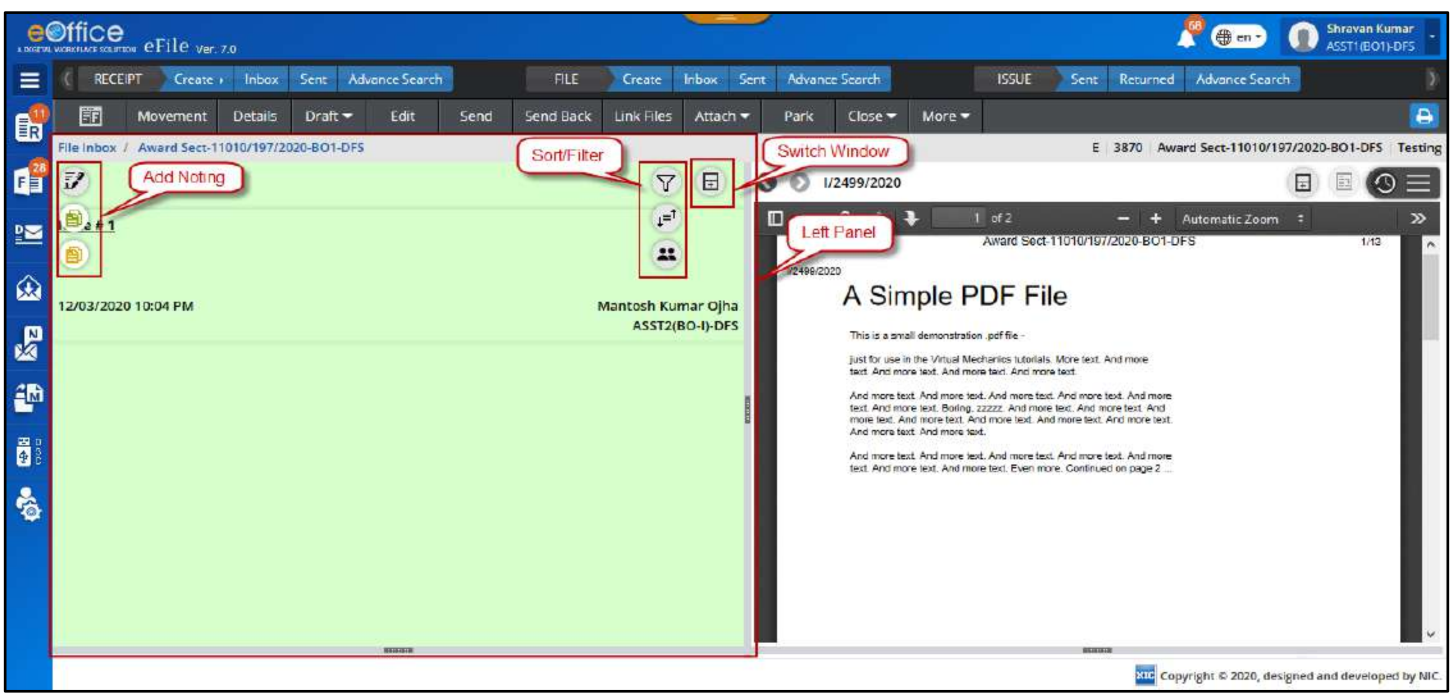



*Figure 191*

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

## *Actions on Right Panel*

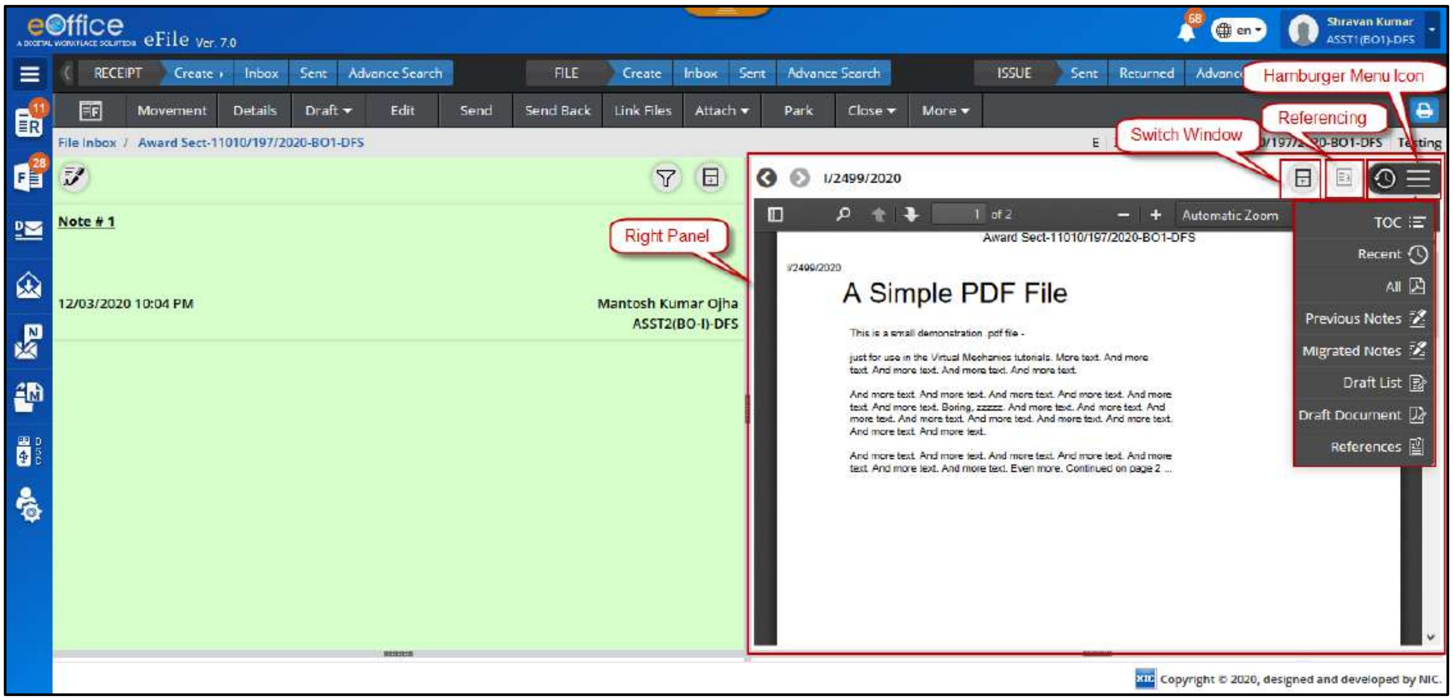



*Figure 192*

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

**Note:**

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

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

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

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

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

## Physical File Inner Page

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

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

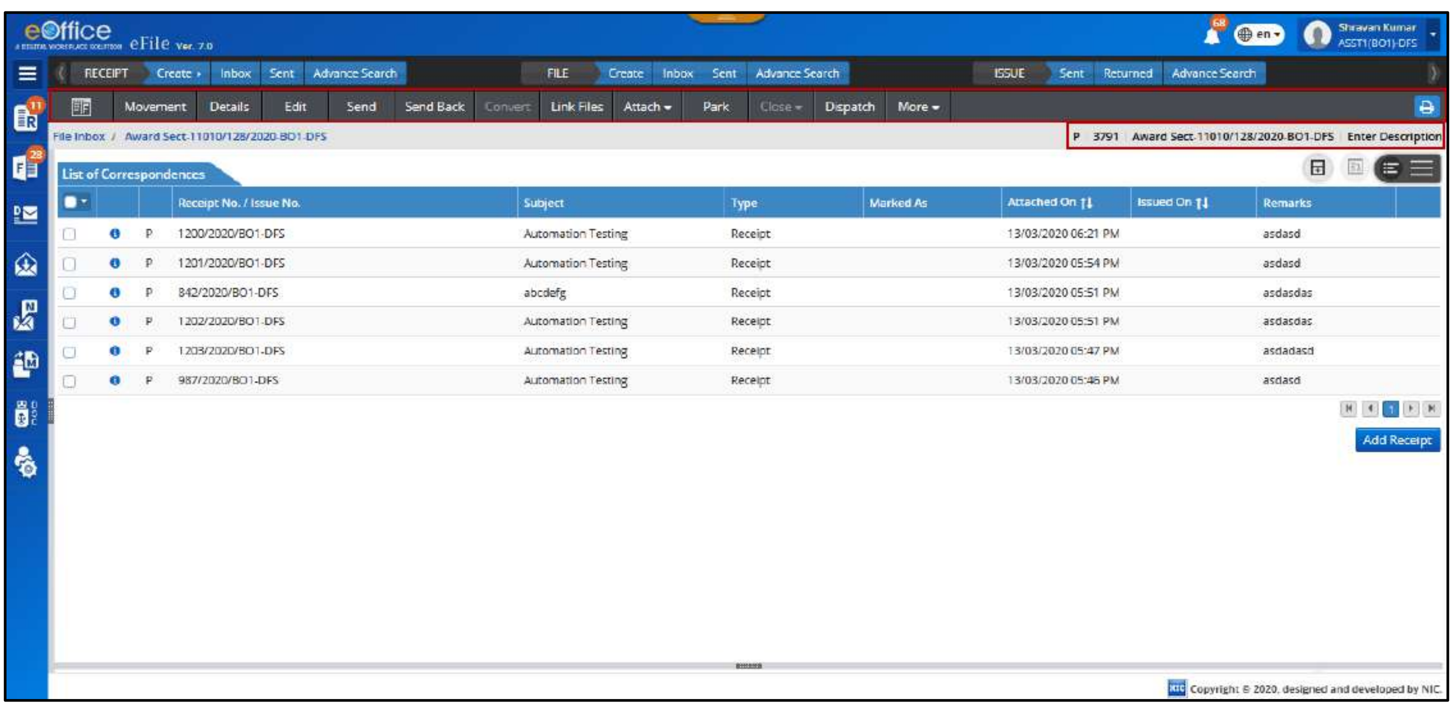



*Figure 193*

# Actions on File Inner Page

## *Action on Menu Bar*

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

**Note:**

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

## *Actions on Correspondence Panel*

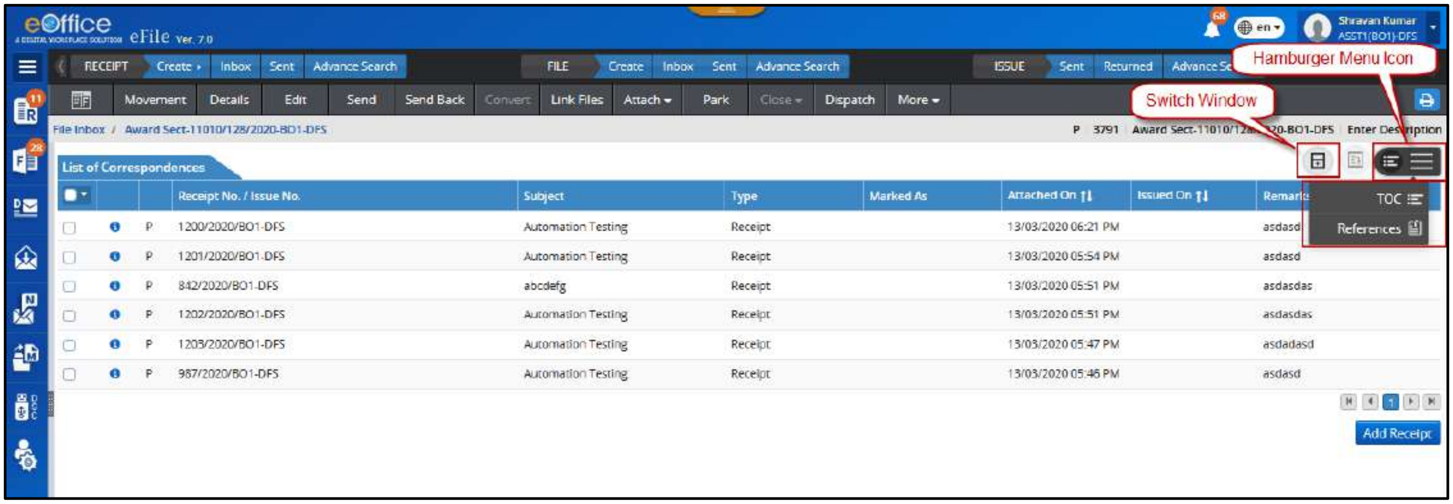



*Figure 194*

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

# Add Correspondence in File

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

## Add Correspondence in Electronic File

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

### Steps to Follow:

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

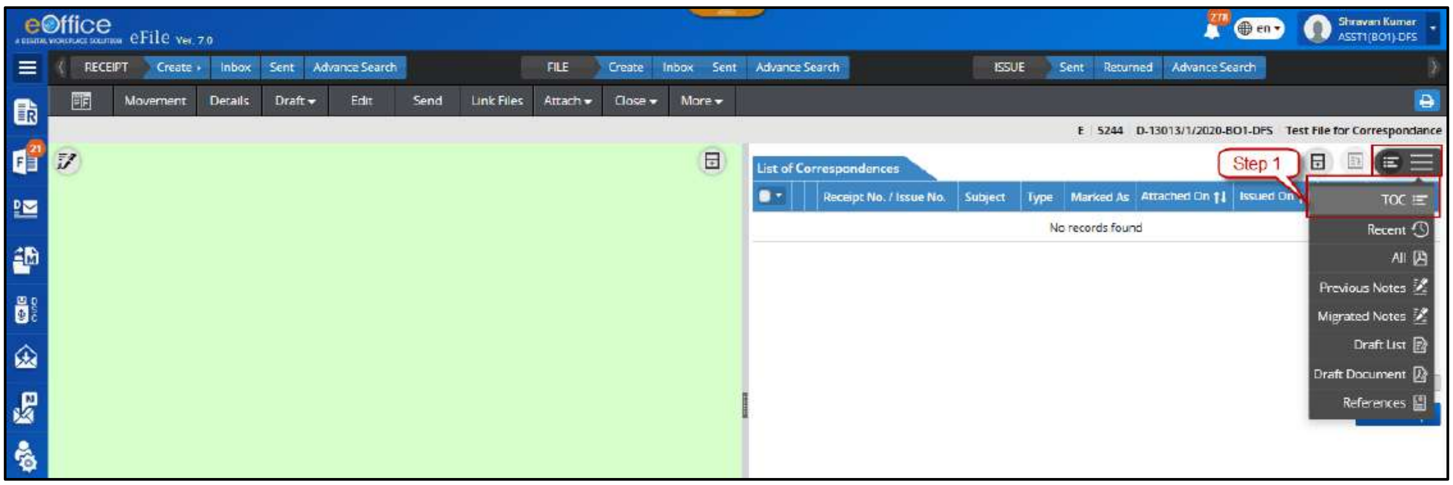



*Figure 195*

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


*Figure 196*

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

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

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

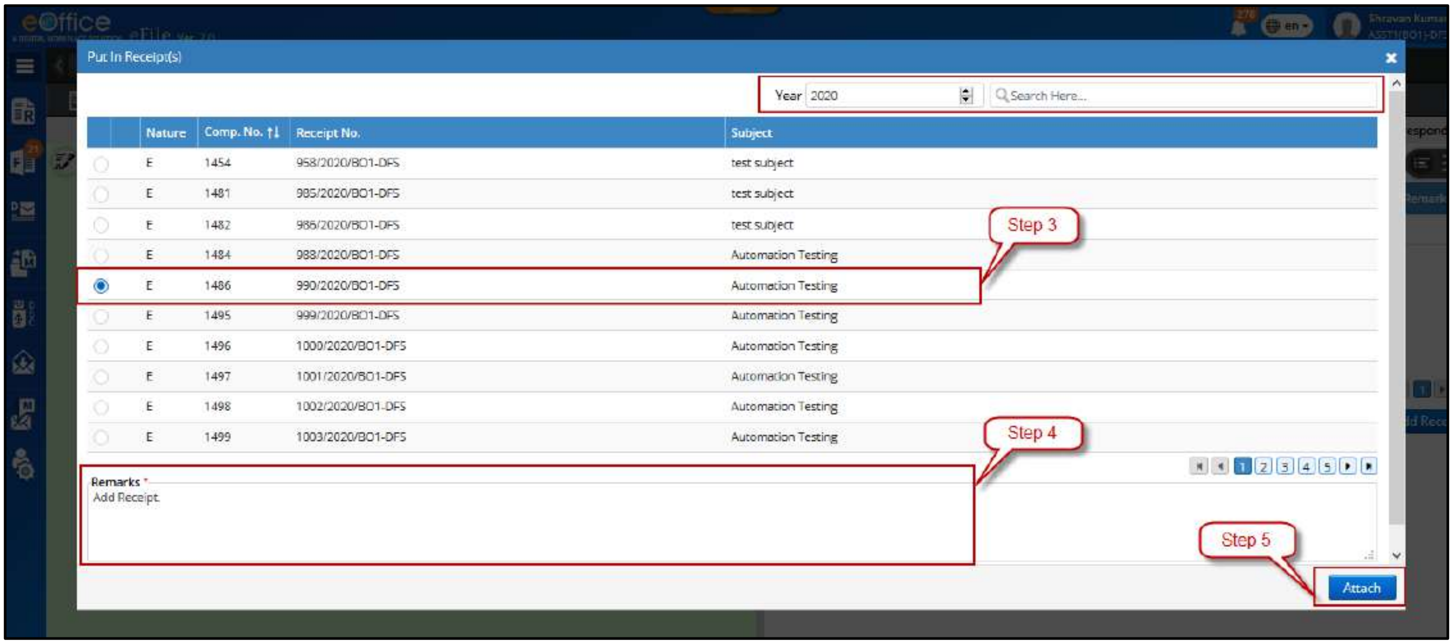
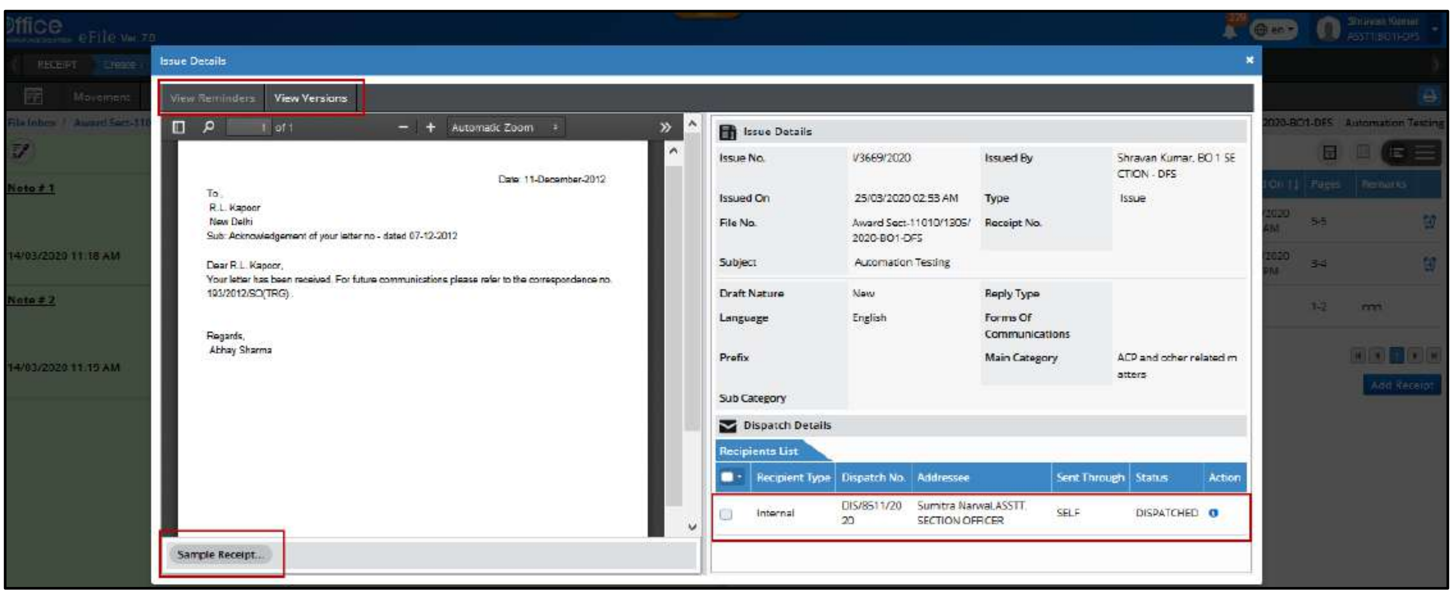


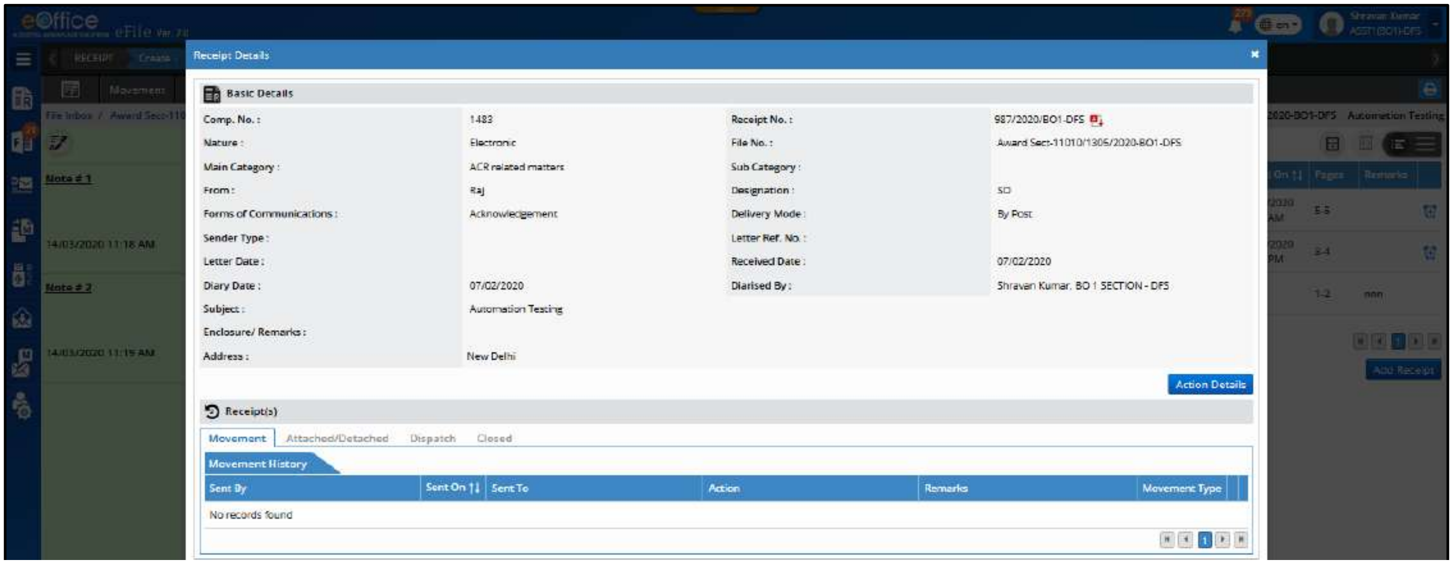

*Figure 197*

## *Action on ToC List*

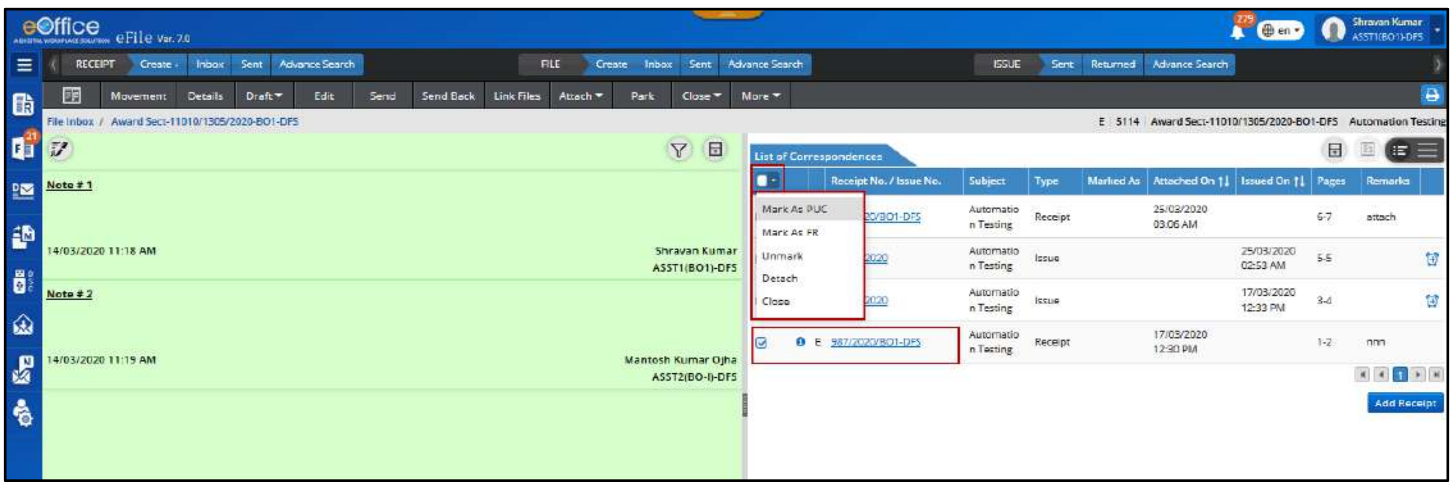
- Issue details, Dispatch Details (with option to View Remainders, View Versions of Issue, Download Issue Attachments, Print envelope and View details of specific dispatch), Dispatched Document (PDF) along with Attachment in respective Issue can be viewed by clicking on information icon adjacent to attached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




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



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



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

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

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

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

  - Not applicable for Issues.

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

  **Note:**

  - Not applicable for Issues and closed receipt.

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

  **Note:**

  - Not applicable for Issues and closed receipt.

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

  **Note:**

  - Not applicable for Issues.

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

  **Note:**

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

- Action on issues like Create Reminders can be taken from correspondence list view.

  - **Create Reminder:** Click **Reminder** link/Icon for Issue, displays the View Reminder window with the Issue Details and Reminder list and details,

    **Note:**

    - Applicable only for Issues.

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

# Add Correspondence in Physical File

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

## STEPS TO FOLLOW:

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

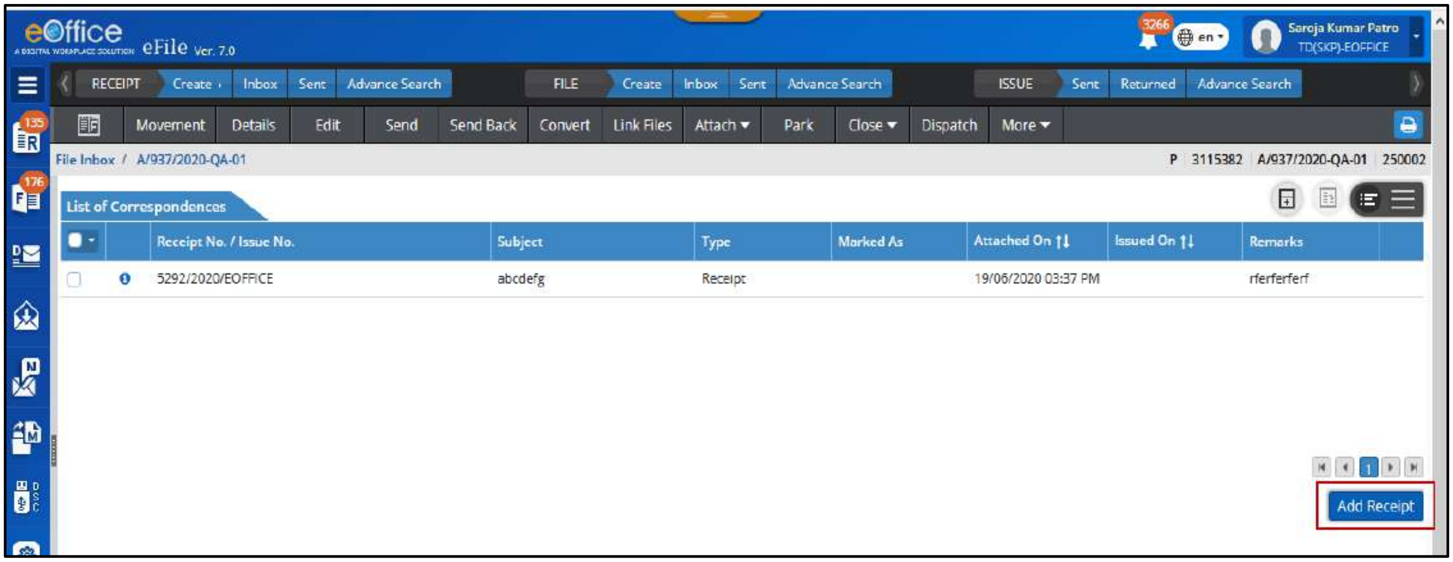



*Figure 198*

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

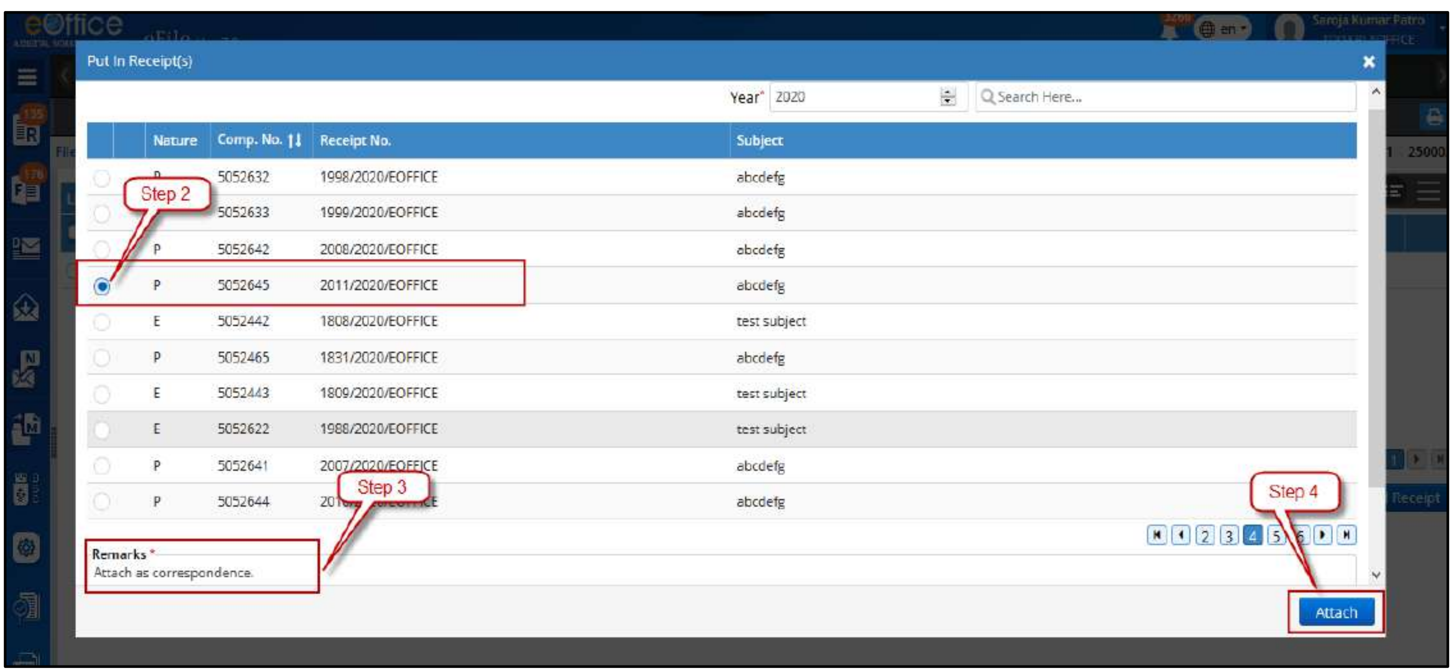



*Figure 199*

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

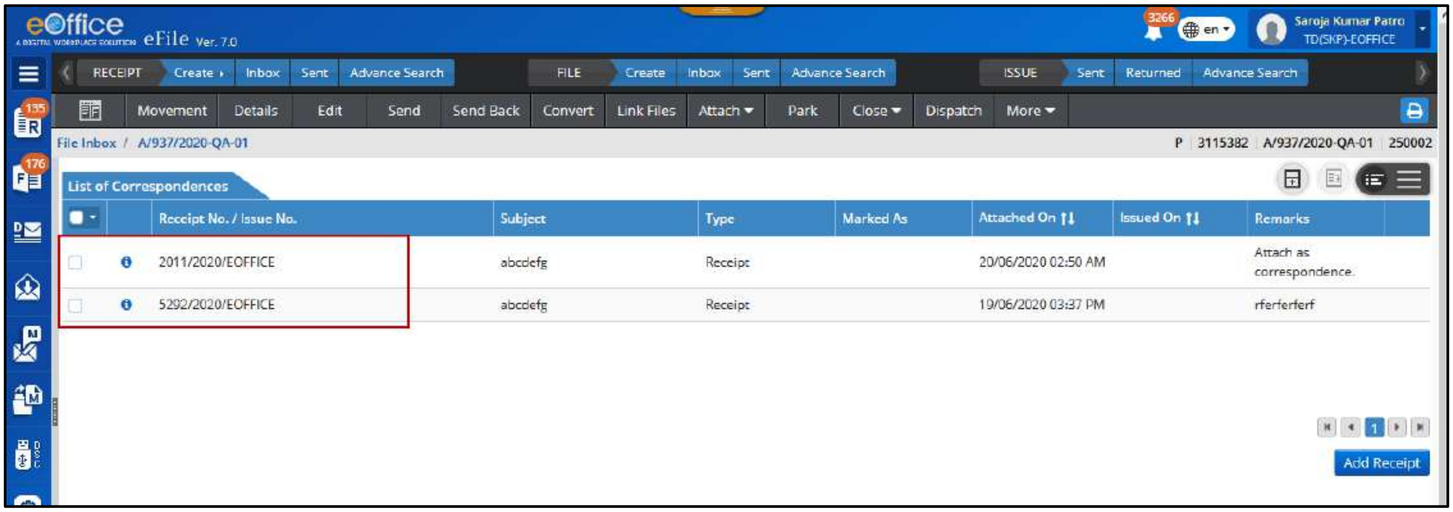


*Figure 200*

**Note:**

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

## *Action on ToC List*

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

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

**Note:**

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

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

**Note:**

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

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

**Note:**

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

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

**Note:**

- Not applicable for Issues and closed receipt.

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

**Note:**

- Not applicable for Issues and closed receipt.

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

**Note:**

- Not applicable for Issues.

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

**Note:**

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

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

**Note:**

- Applicable only for Issues.

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

# Add Noting

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

## Add Green Note

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

**STEPS TO FOLLOW:**

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

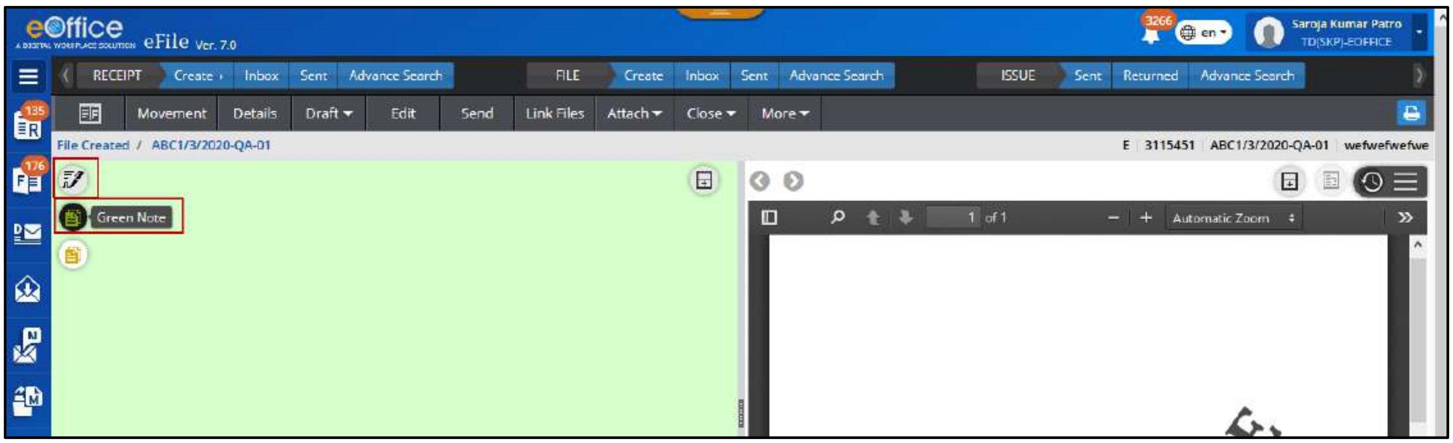



*Figure 201*

**Note:**

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

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

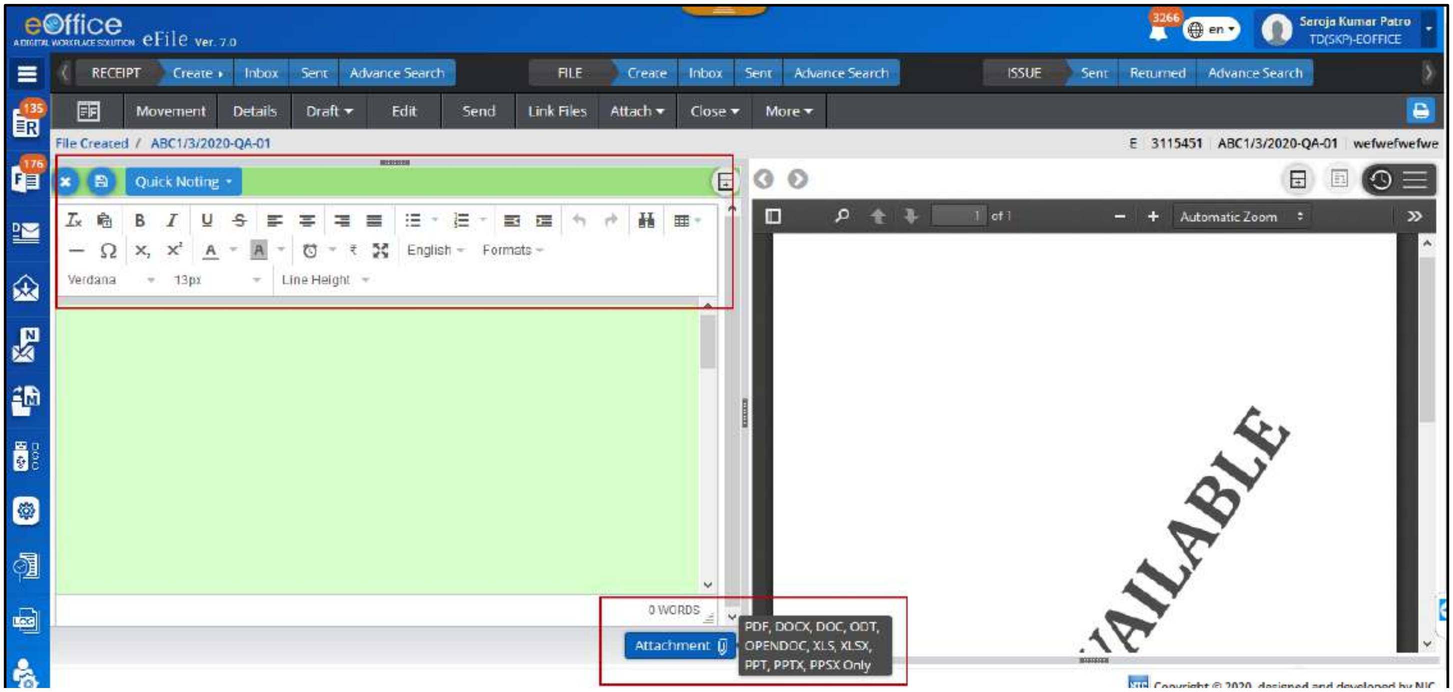



*Figure 202*

**Note:**

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

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

**Note:**

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

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

**Note:**

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

## Edit Saved Green Noting

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

## Discard Saved Green Noting

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

**Note:**

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

# Add Yellow Noting

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

**STEPS TO FOLLOW:**

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

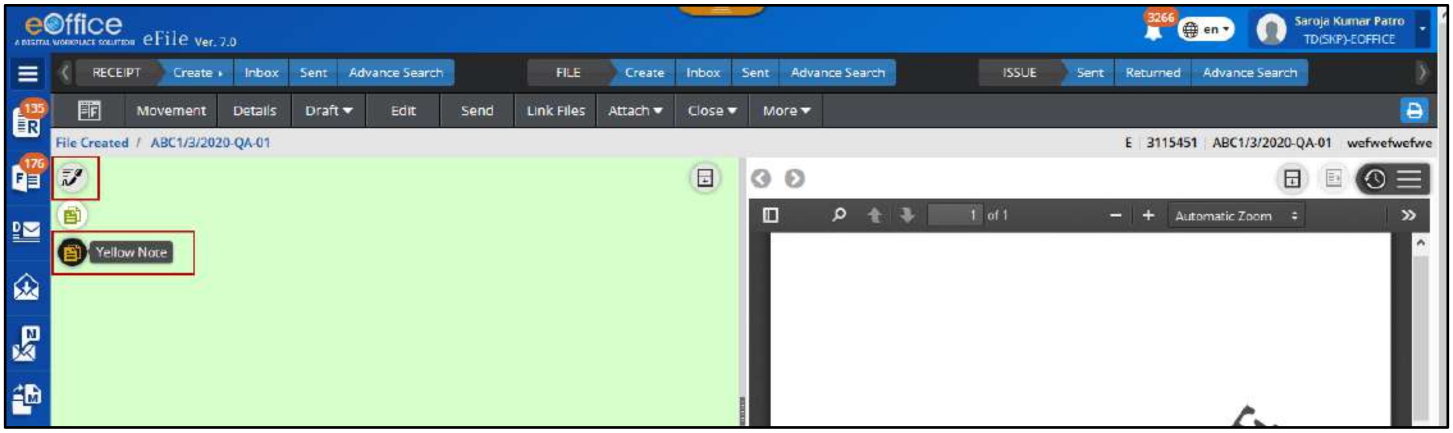



*Figure 203*

**Note:**

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

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

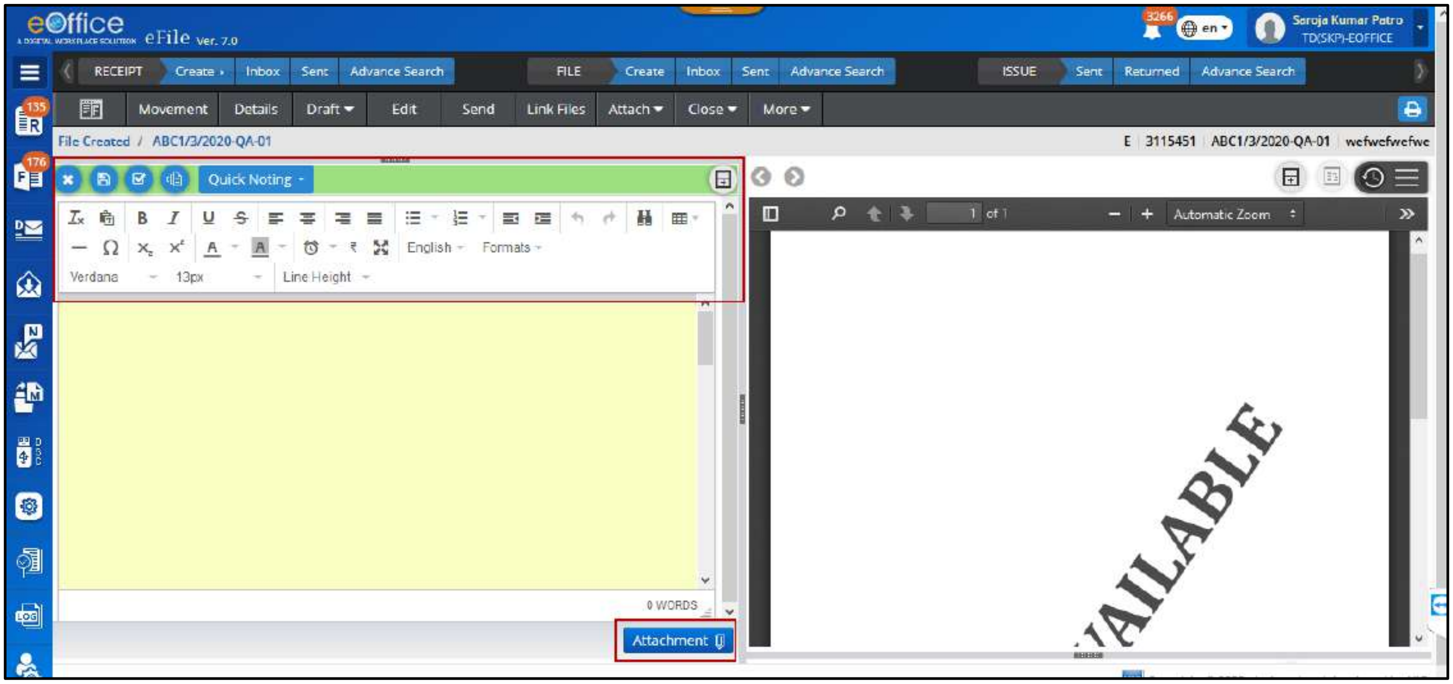



*Figure 204*

**Note:**

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

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

**Note:**

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

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

**Note:**

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

# Edit Saved Yellow Noting

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

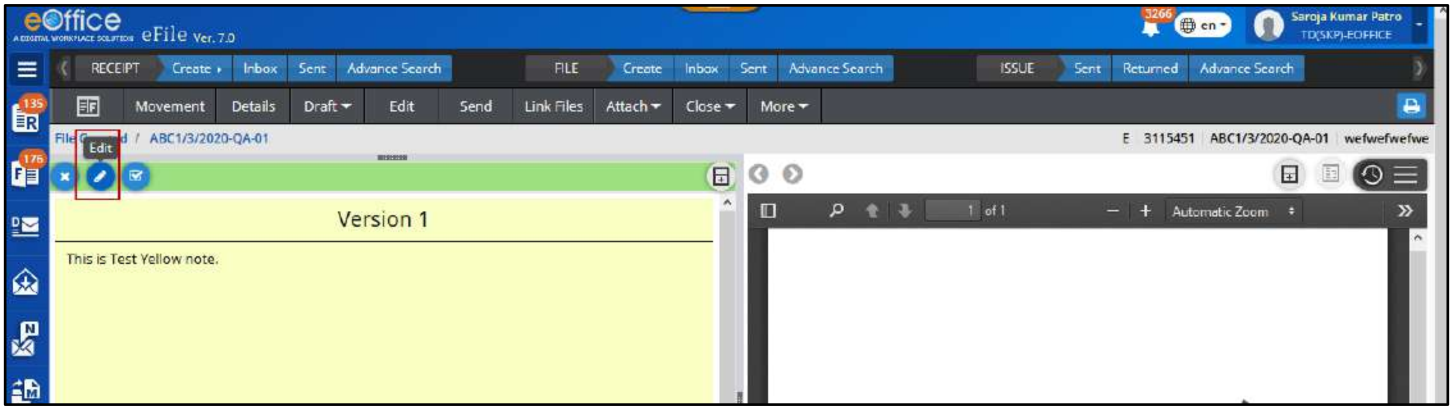



*Figure 205*

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

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

# Confirm Saved Yellow Noting

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

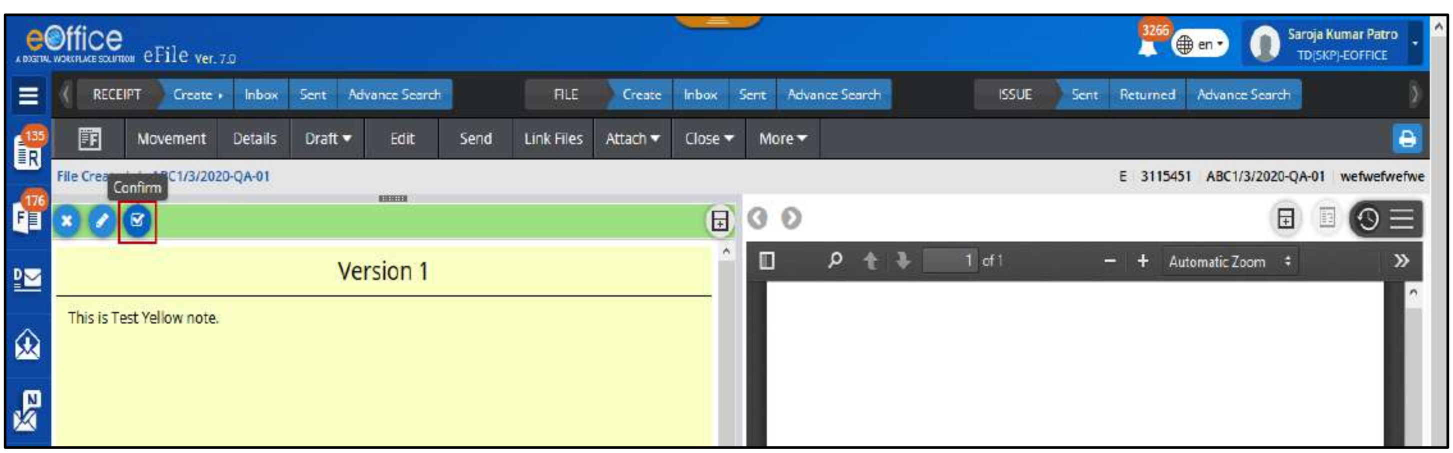



*Figure 206*

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

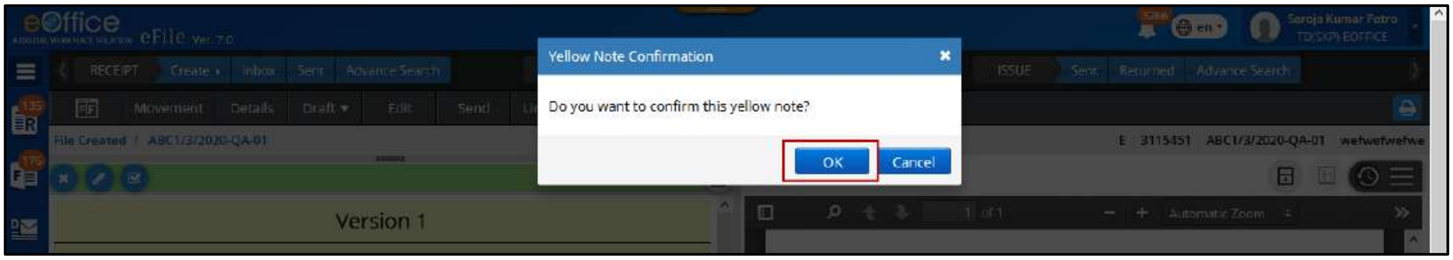



*Figure 207*

**Note:**

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

# Discard Saved Yellow Noting

1. Click "**File Number**" link from Inbox/Inbox Folder/Created/Parked list.

2. Click **Discard** icon on Note Action Header or **Discard** icon available in version list page of yellow note.

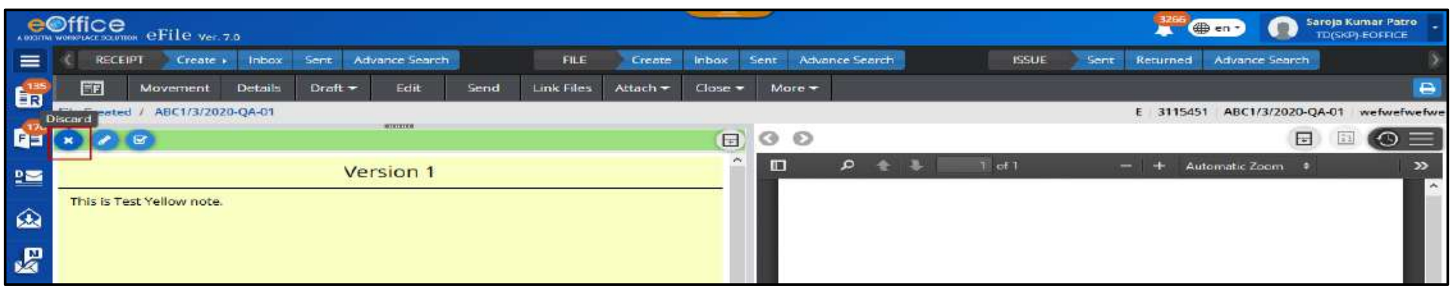



*Figure 208*

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

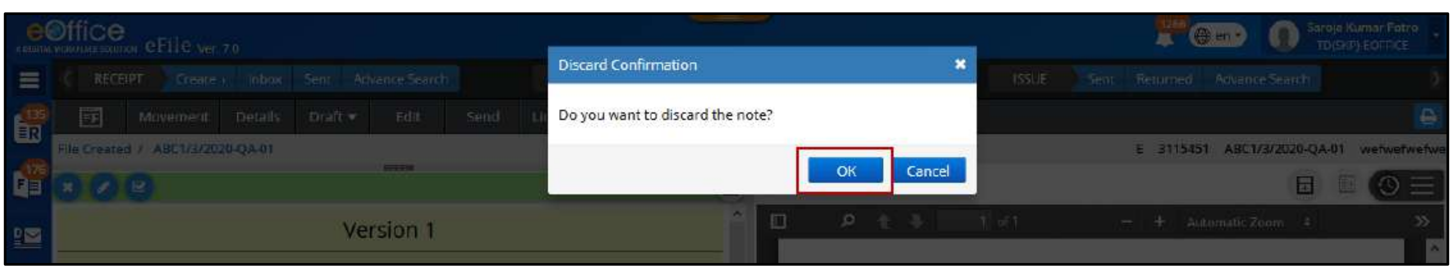



*Figure 209*

**Note:**

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

# View version of Yellow Note

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

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

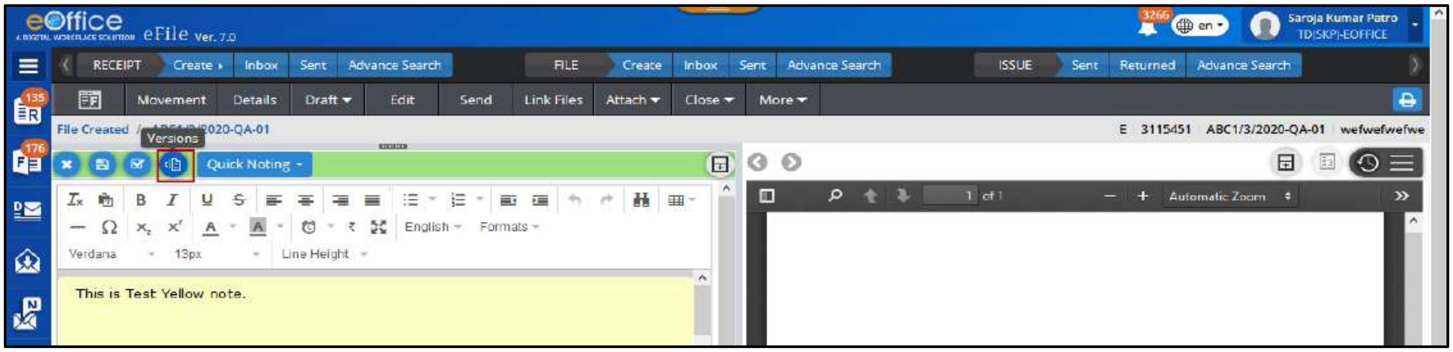


*Figure 210*

**Note:**

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

# Refer a Correspondence in a Green/Yellow Note

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

## STEPS TO FOLLOW:

### Scenario 1

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

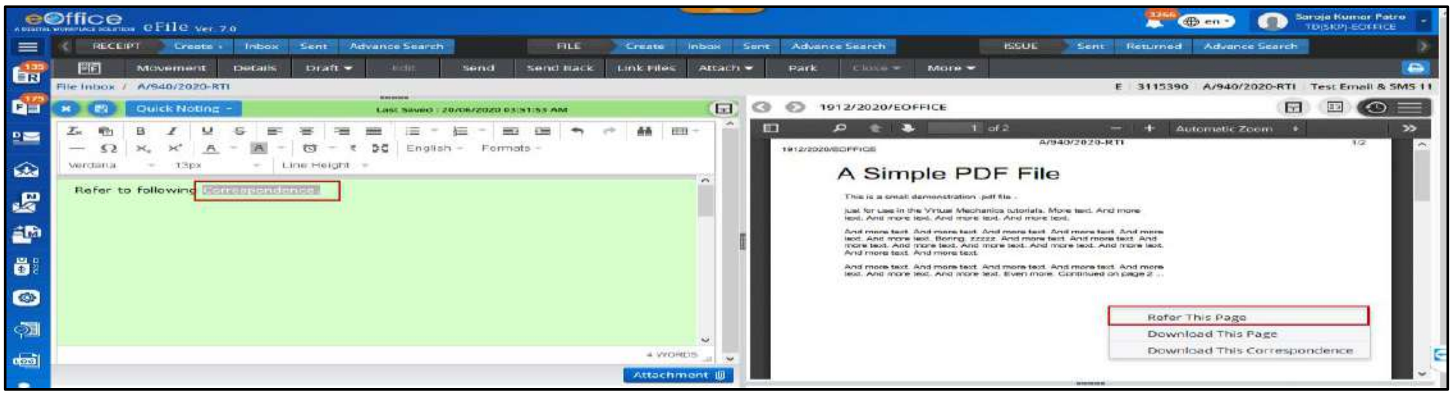



*Figure 211*

### Scenario 2

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

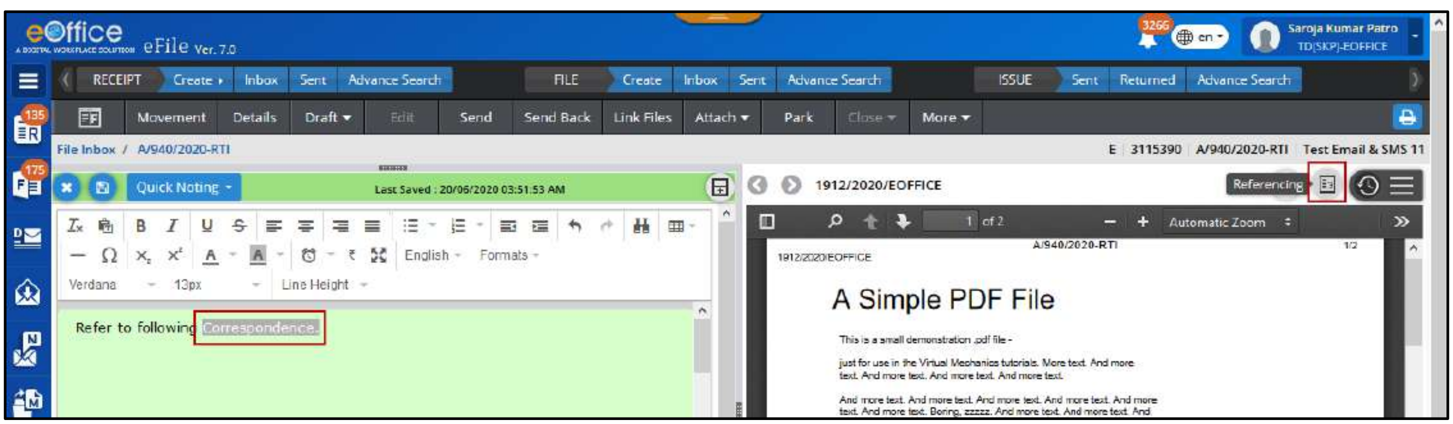



*Figure 212*

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

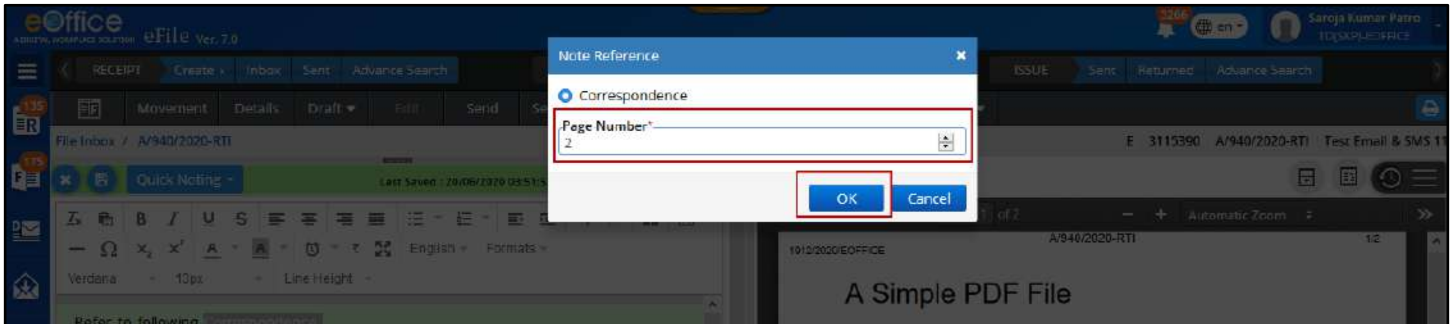



*Figure 213*

**Note:**

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

# Refer a Previous Note in a Green/Yellow Note

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

## STEPS TO FOLLOW:

### Scenario 1

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

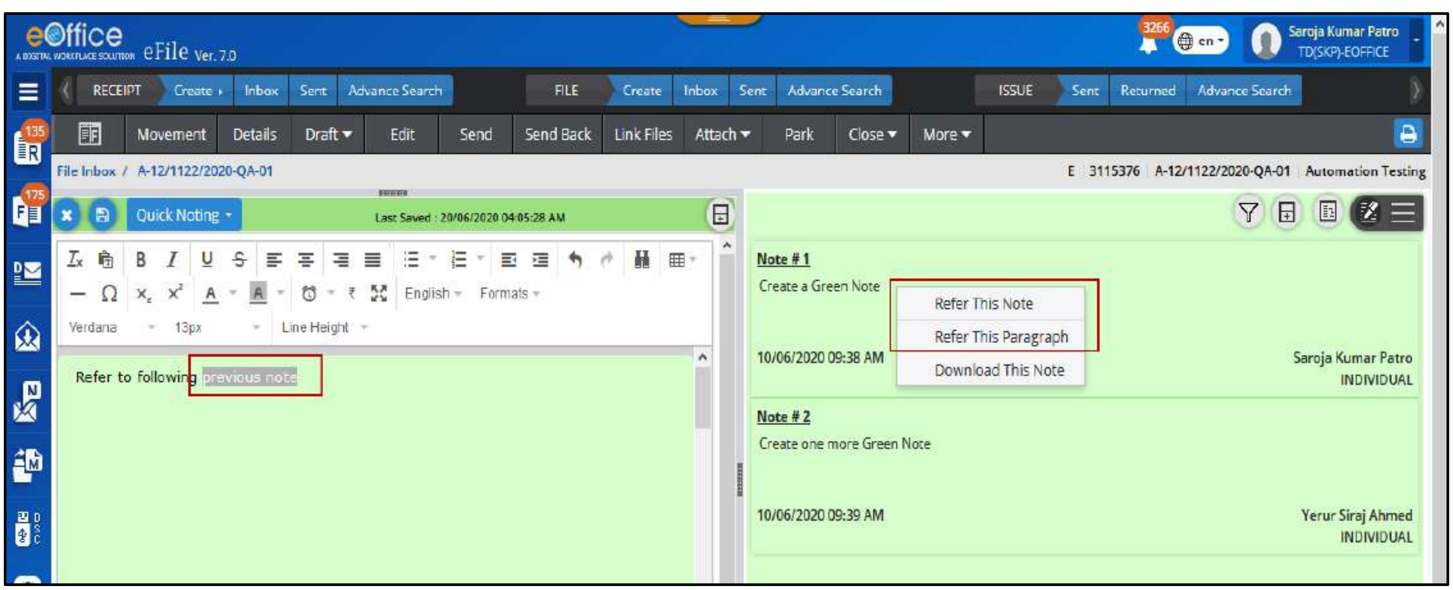



*Figure 214*

## Scenario 2

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

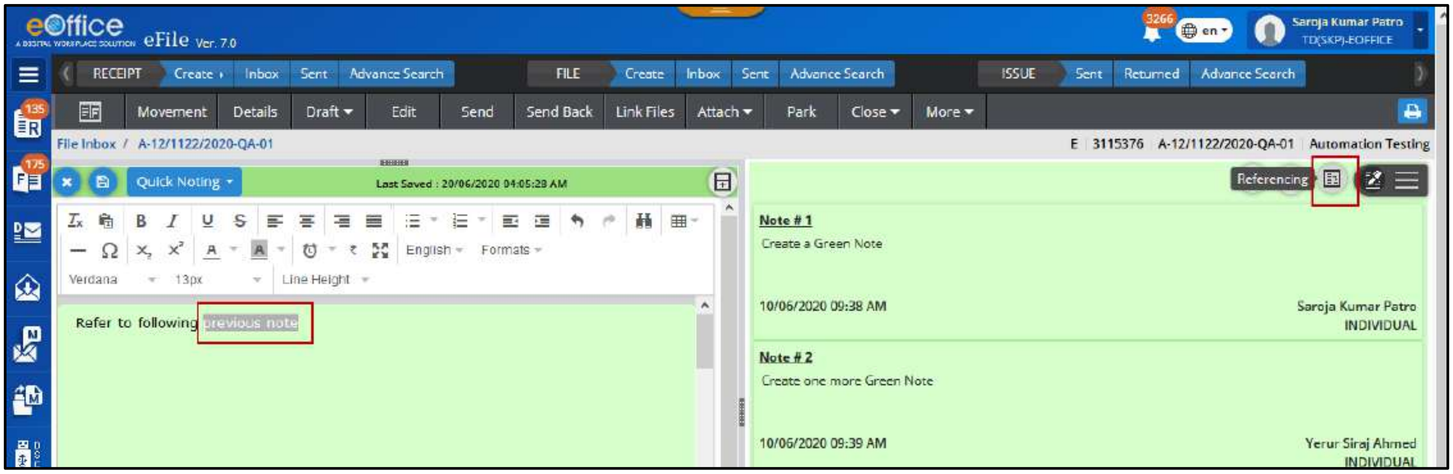



*Figure 215*

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

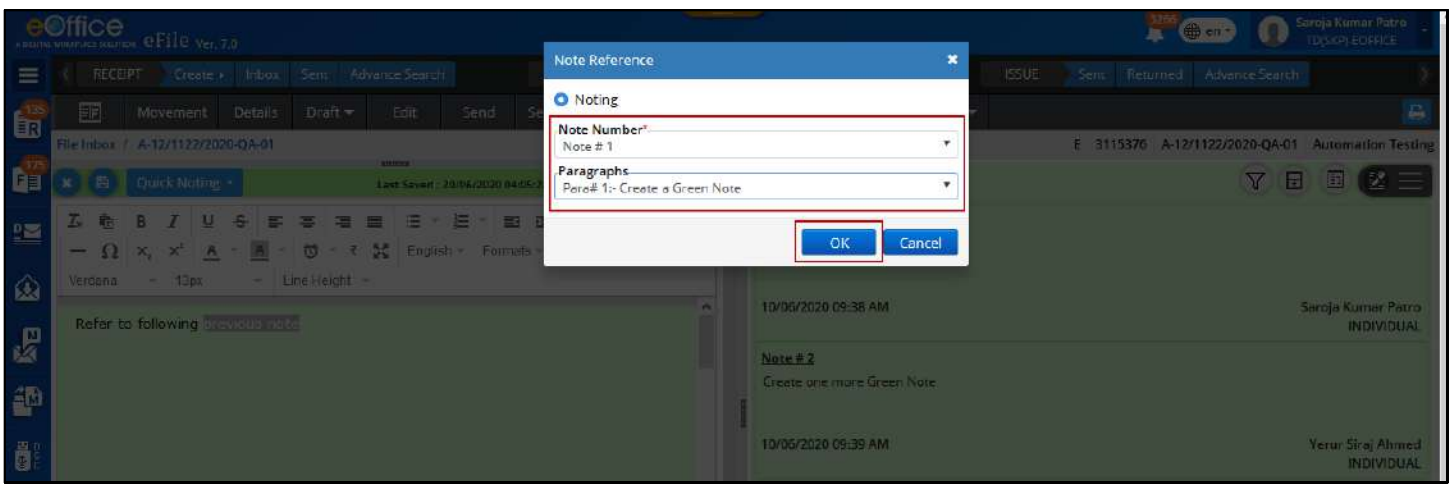



*Figure 216*

**Note:**

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

# Edit File Details

This feature is required to edit metadata of File.

## Important Points:

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

## STEPS TO FOLLOW:

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

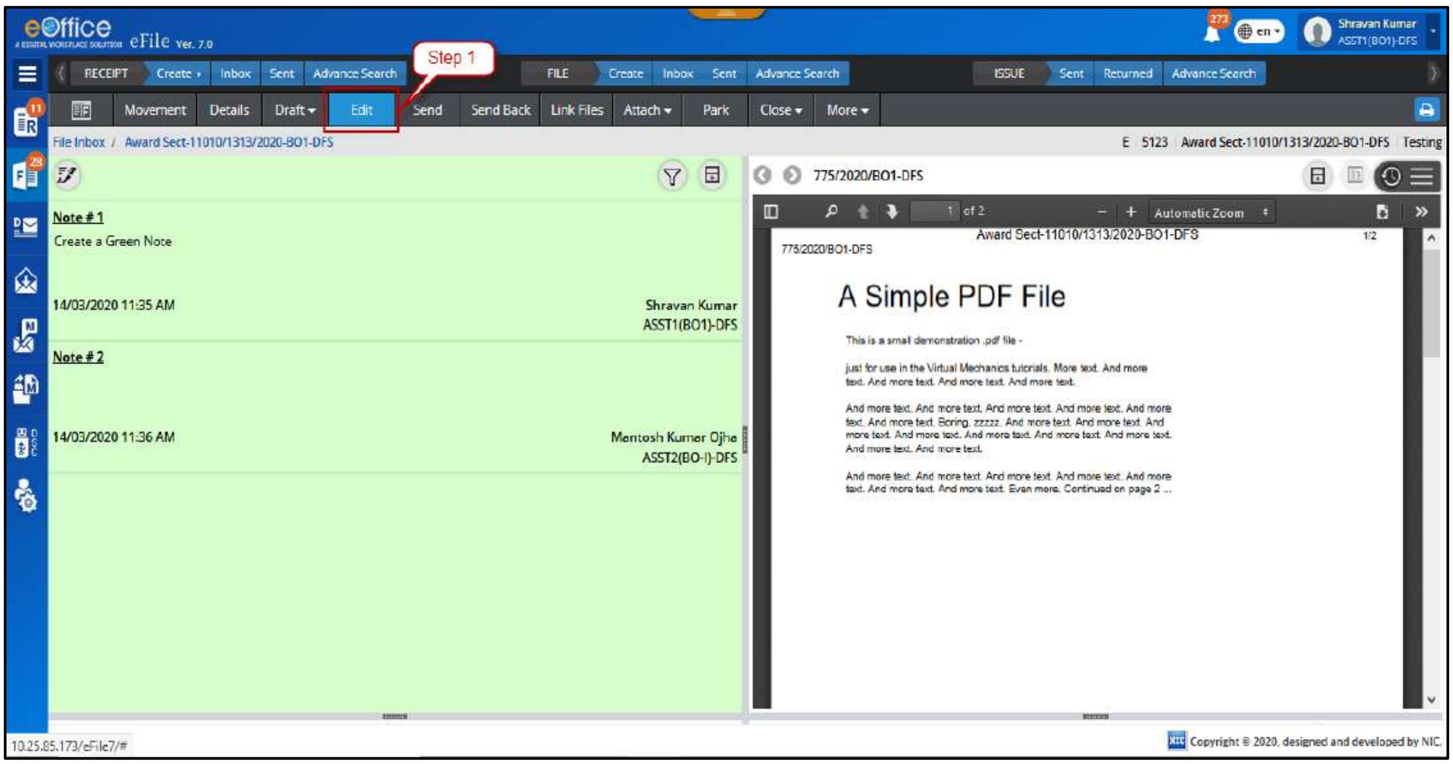



*Figure 217*

2. Make the necessary changes in Subject Description, Main Category, Sub-Category, Remarks, Language, Previous and Future Reference values. (Figure 218)

3. Click **Save** button to save the changes and complete the editing of file.


*Figure 218*

**Note:**

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

# File Attachments

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

## Attaching Files with main file

**Important Points:**

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

### STEPS TO FOLLOW:

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

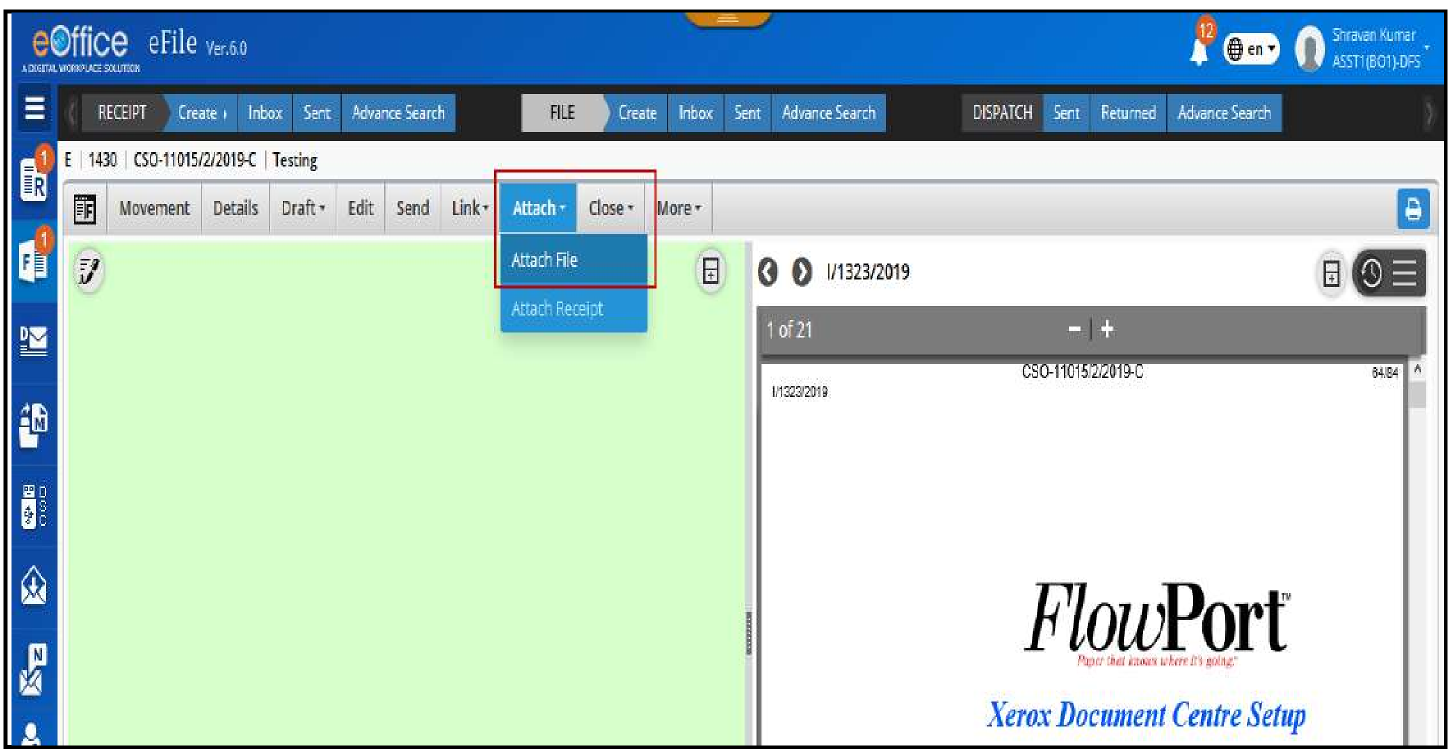



*Figure 219*

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

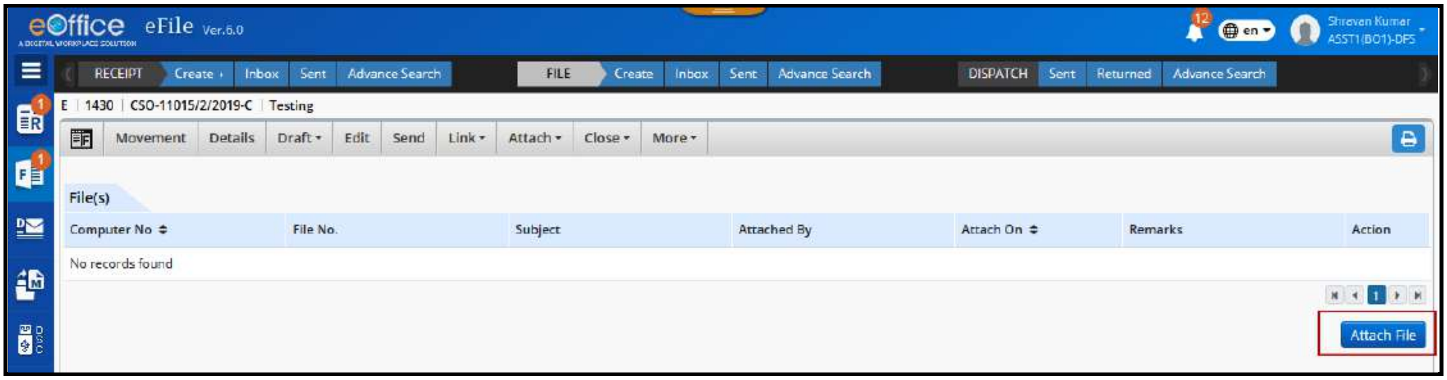



*Figure 220*

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

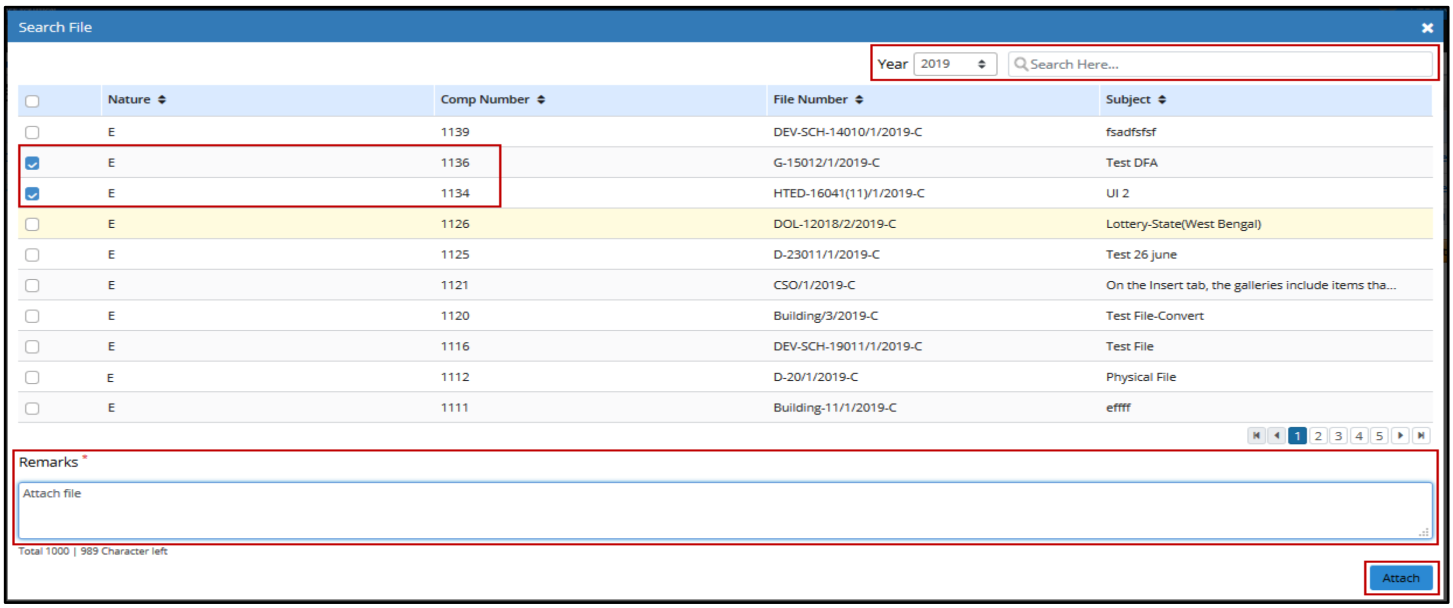



*Figure 221*

4. Enter mandatory **Remarks**.

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

**Note:**

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

# Attaching Receipt with Main File

## Important Points:

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

## STEPS TO FOLLOW:

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

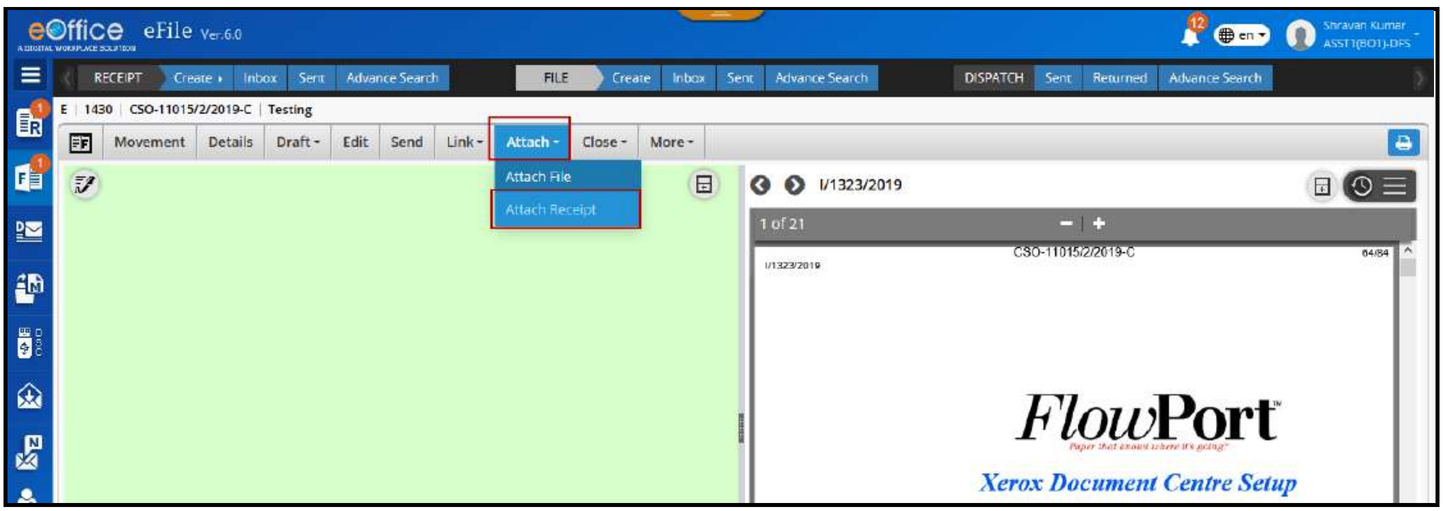


*Figure 222*

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

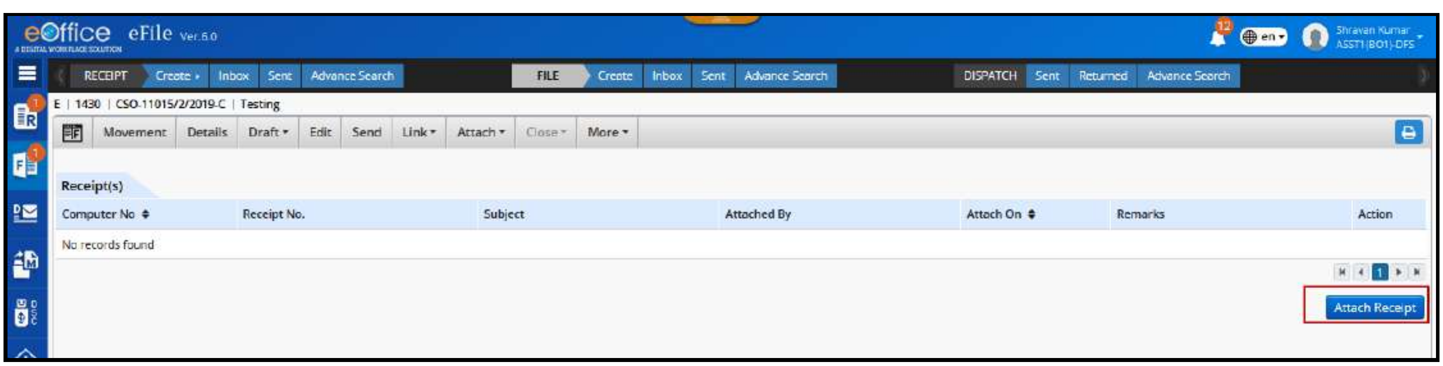


*Figure 223*

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

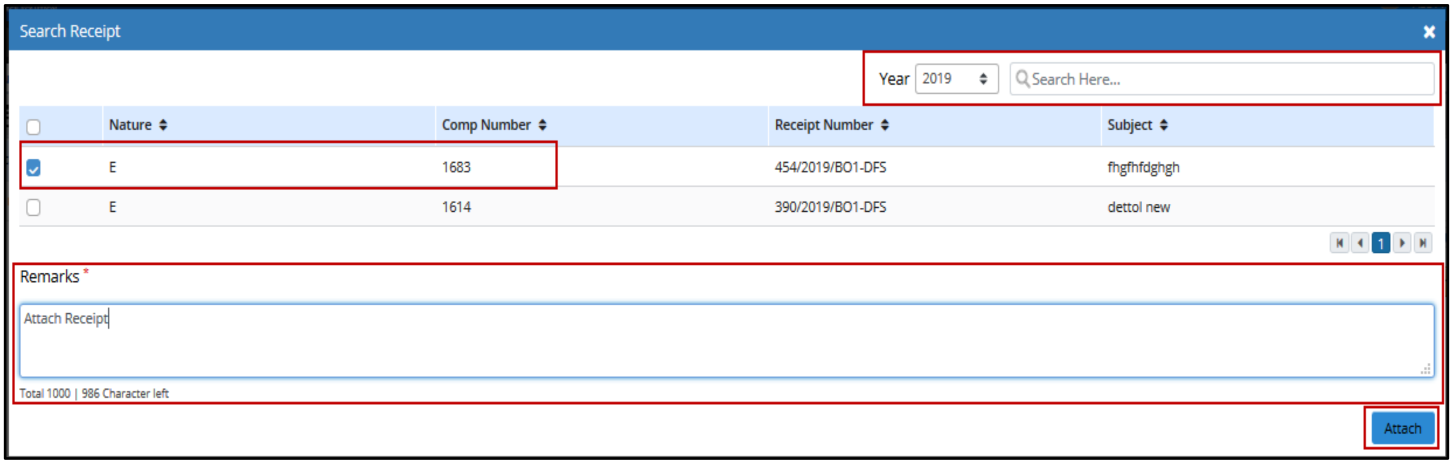



*Figure 224*

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

**Note:**

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

# Detach already attached Files

## Important Points:

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

**STEPS TO FOLLOW:**

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

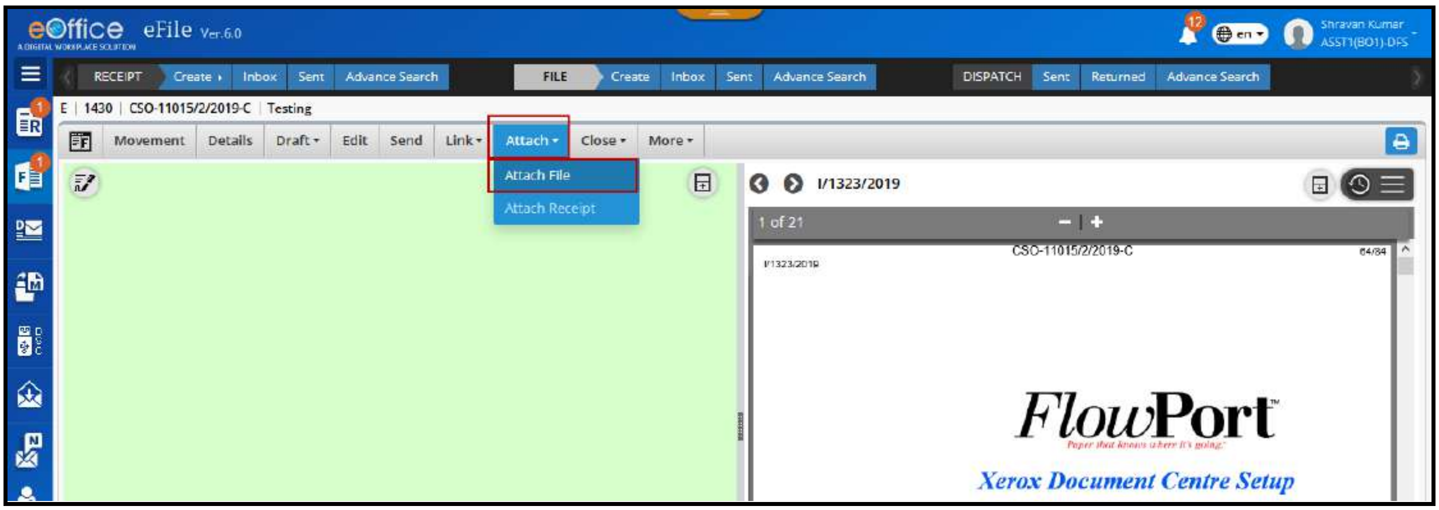



*Figure 225*

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

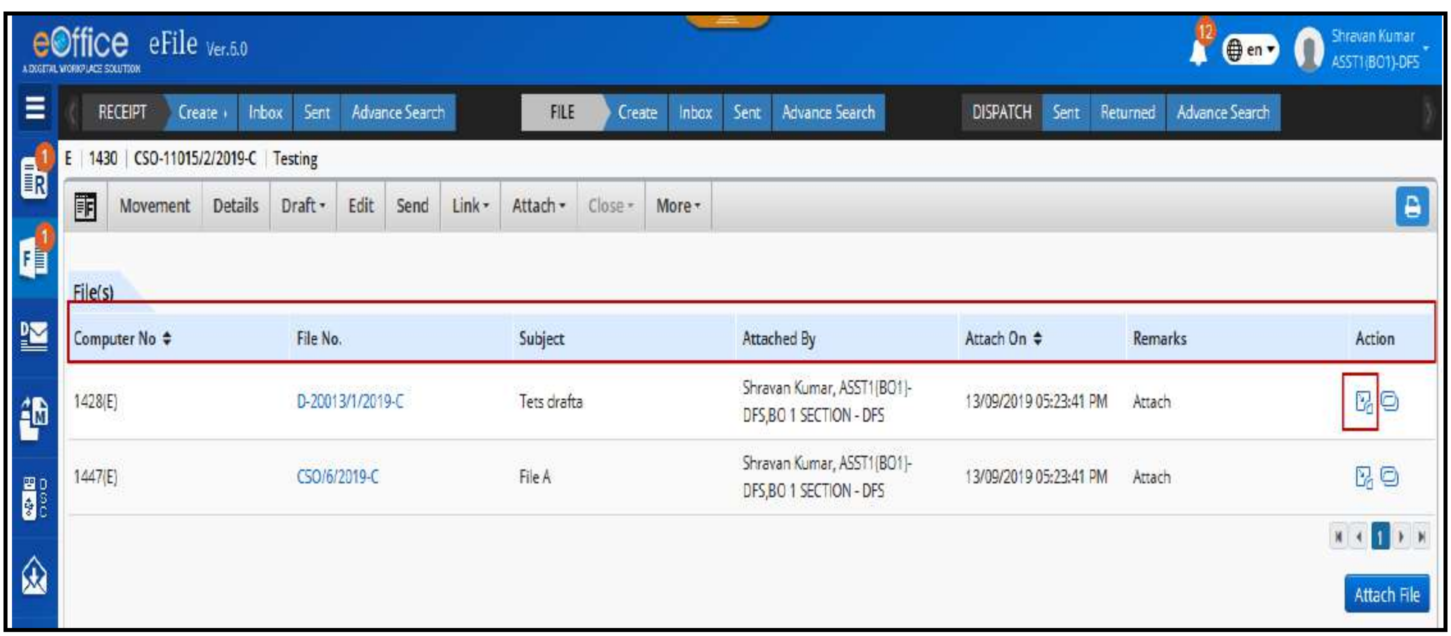



*Figure 226*

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

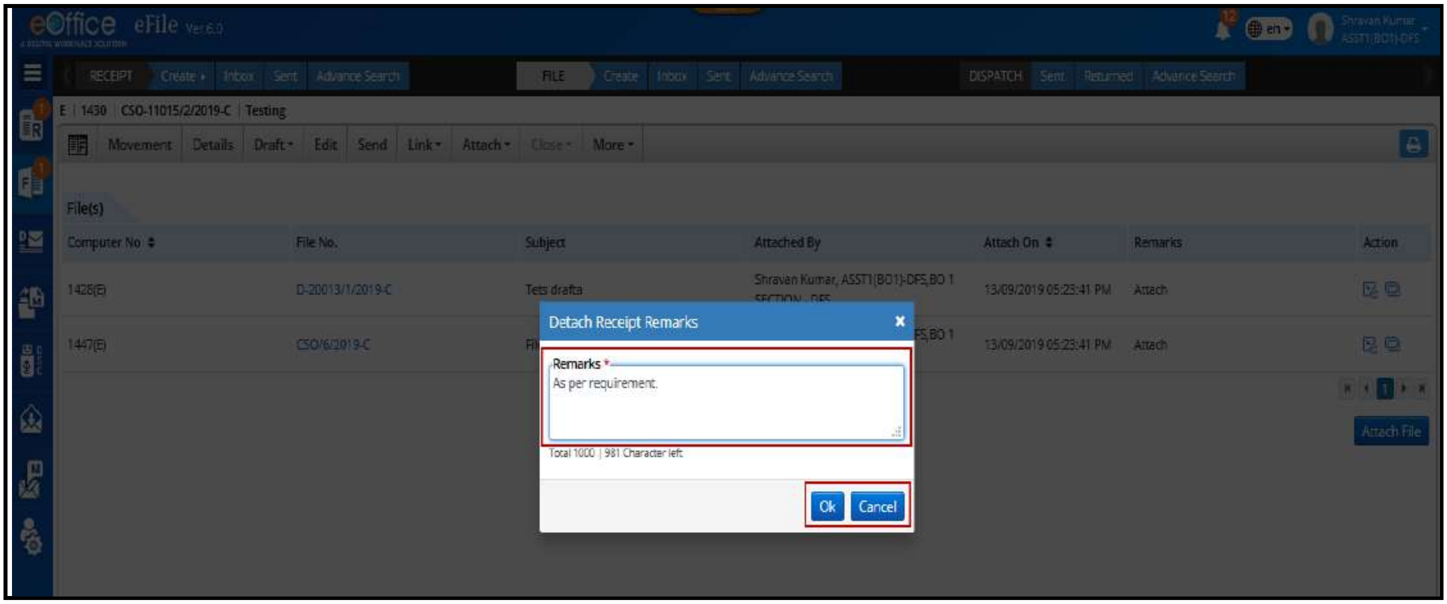



*Figure 227*

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

**Note:**

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

# Detach already attached Receipts

## Important Points:

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

**STEPS TO FOLLOW:**

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

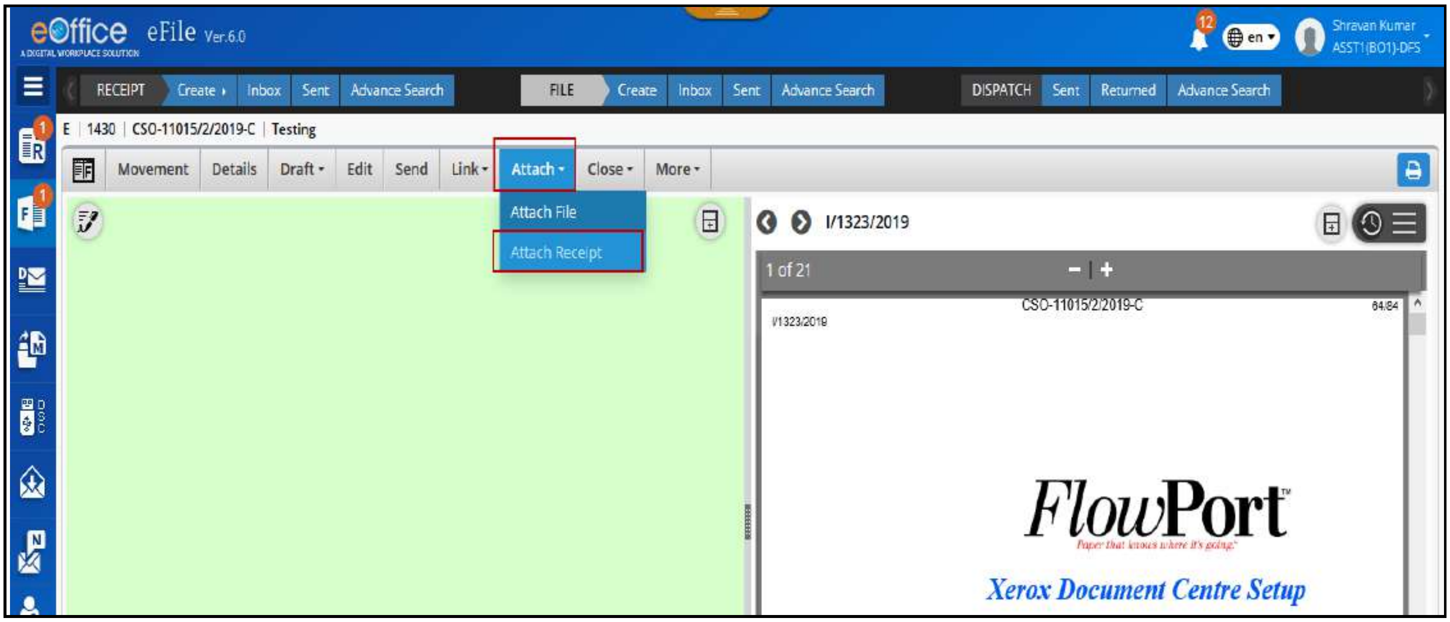



*Figure 228*

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

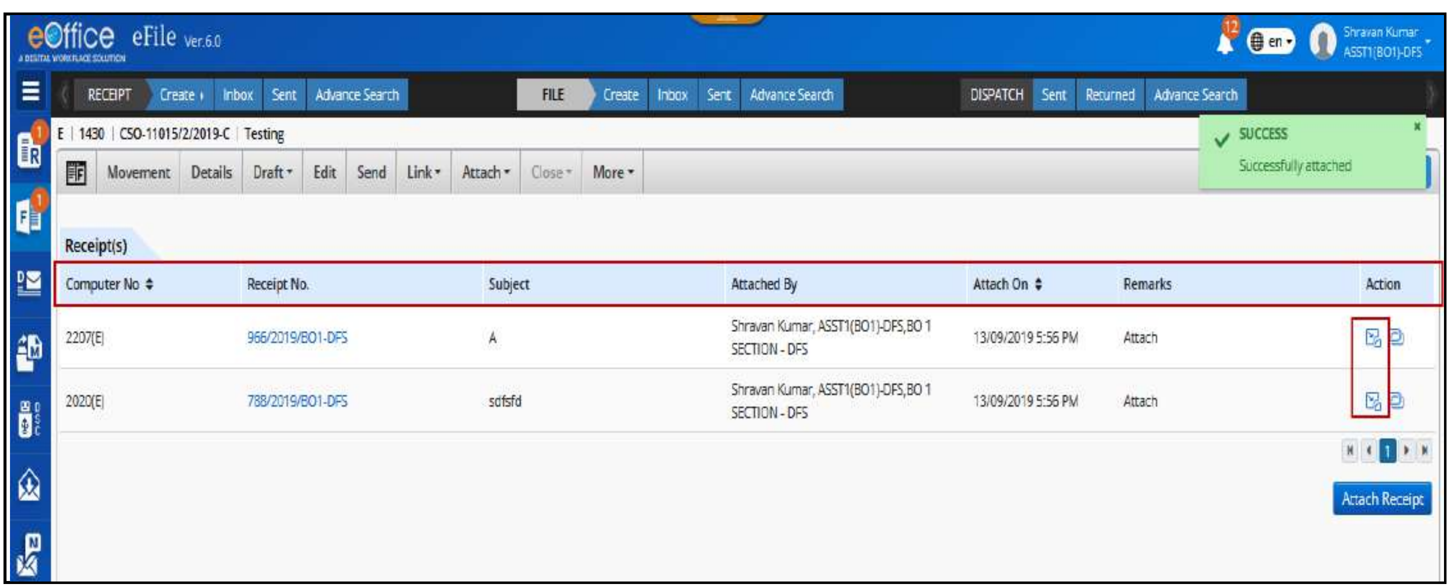



*Figure 229*

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

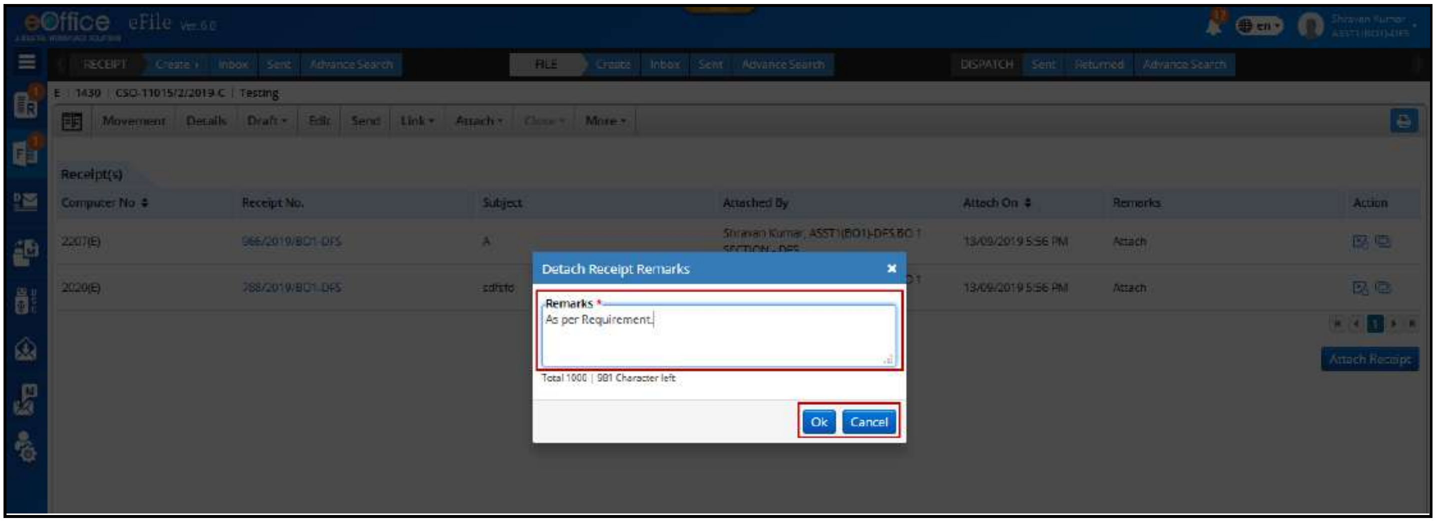



*Figure 230*

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

**Note:**

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

# Attach with another File

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

**Important Points:**

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

**STEPS TO FOLLOW:**

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

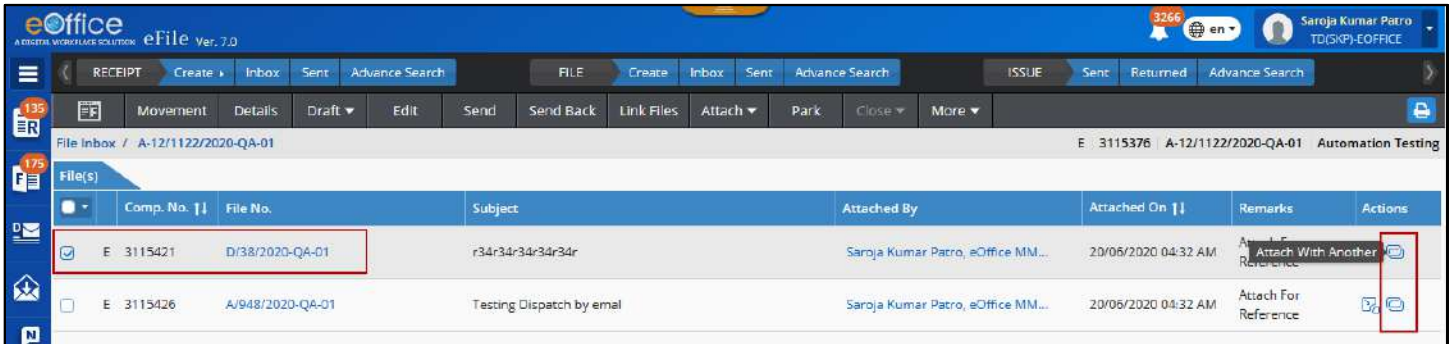



*Figure 231*

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

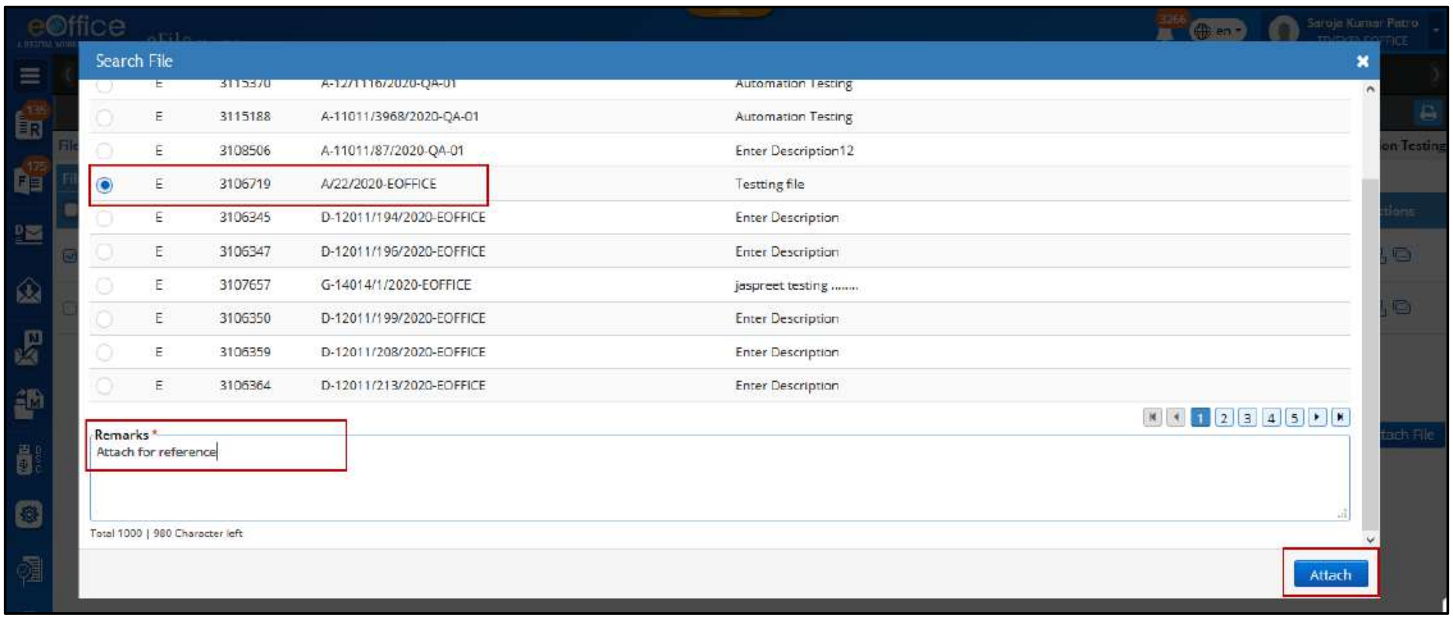



*Figure 232*

**Note:**

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