

Regional Training Institute, Jaipur

Indian Audit & Accounts Department



Web Based Course

on

Basics of File Management System (e-Office)



eoffice
A DIGITAL WORK PLACE SOLUTION

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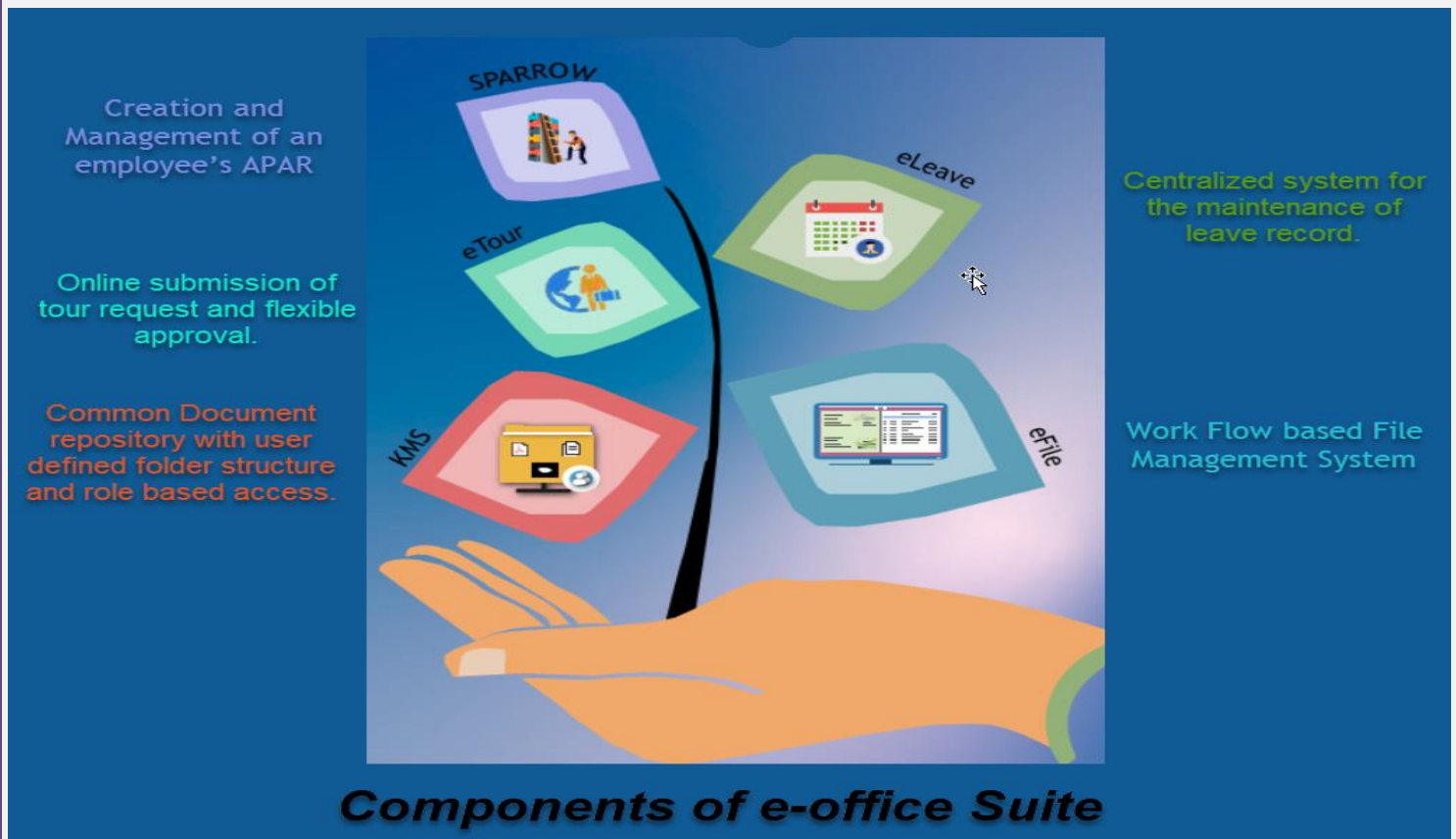
1. Introduction

The need for transforming conventional government offices into more efficient and transparent e-offices, eliminating huge amounts of paperwork has long been felt.

E-office initiated in year 2009 by **NIC**, with the objective to improve the Government functioning through more efficient, effective and transparent Inter-Government and Intra Government transactions and processes. It is a complete digital work place solution for Government offices and is based on Central Secretariat Manual of e-Office Procedure (CSMeOP), formulated by Department of Administrative Reforms and Public Grievances (DAR&PG).

E-office project under **e-Kranti** which is the 5th pillar of **Digital India** is being increasingly adopted by central and state Government Departments for achieving the objective of Governance with Accountability, Transparency and Innovation (GATI).

E-office is a product suite possesses several applications for transforming day to day official work of an organization.



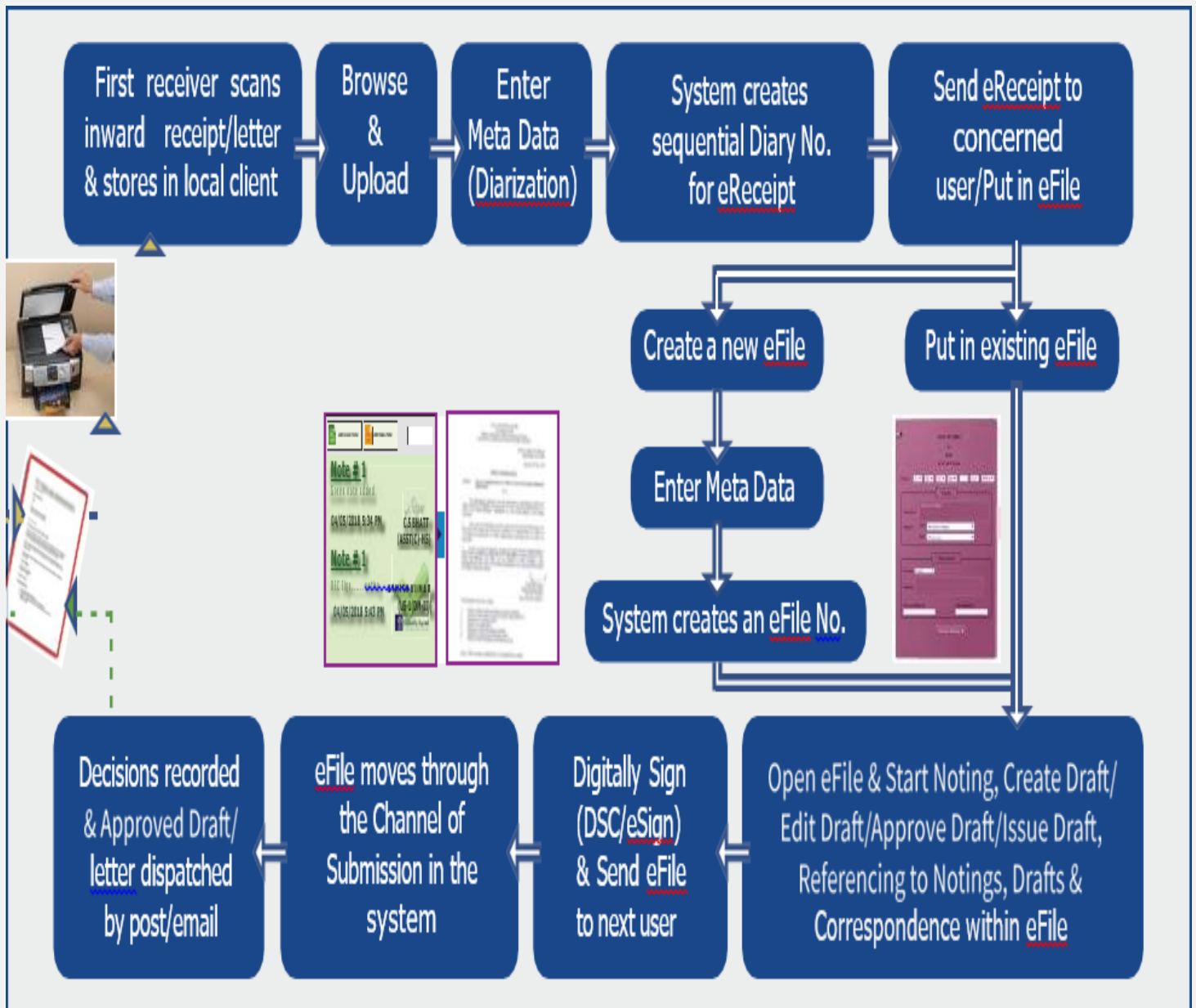
E-file, a component of e-office suite enables a paperless office by scanning, registering and routing the inward correspondences along with creation of file, noting, referencing, correspondence attachment, draft for approvals and finally movement and tracking of files as well as receipts.

The formulation of this material is an effort to layout the steps and operations required during the file processing at various levels.

2. File Management System

File Management System (FMS) or eFile is a workflow based system that includes the features of existing manual handling of files in addition to more efficient electronic system.

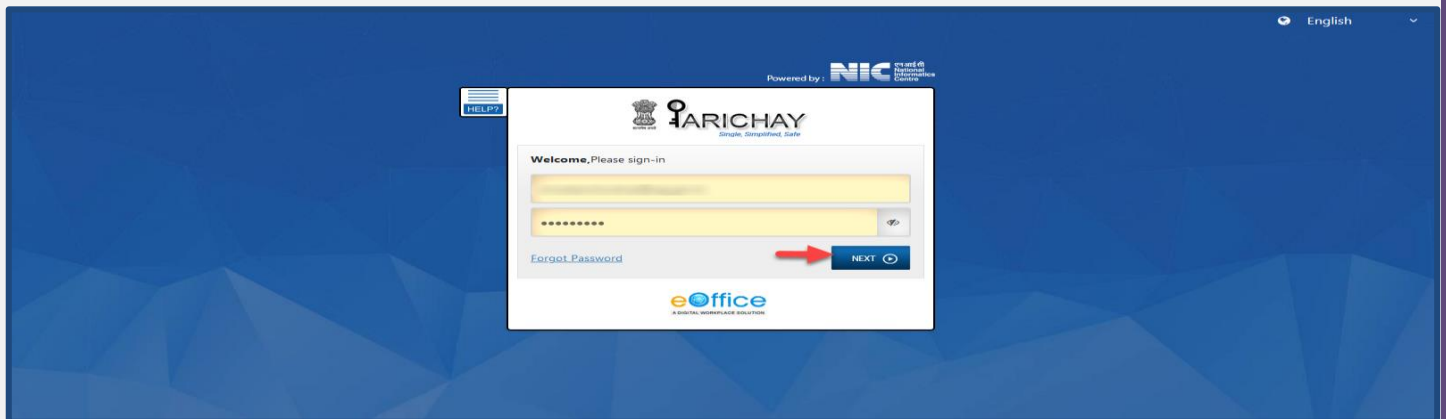
eFile comprises of various modules which manage the official work flow during the entire life cycle of a DAK i.e. the moment dak is received by the organization till the time it is disposed of with proper set of actions.



An overview of File Management System

3. Login to e-file/File Management System

- Go to the URL <https://cag.eoffice.gov.in>



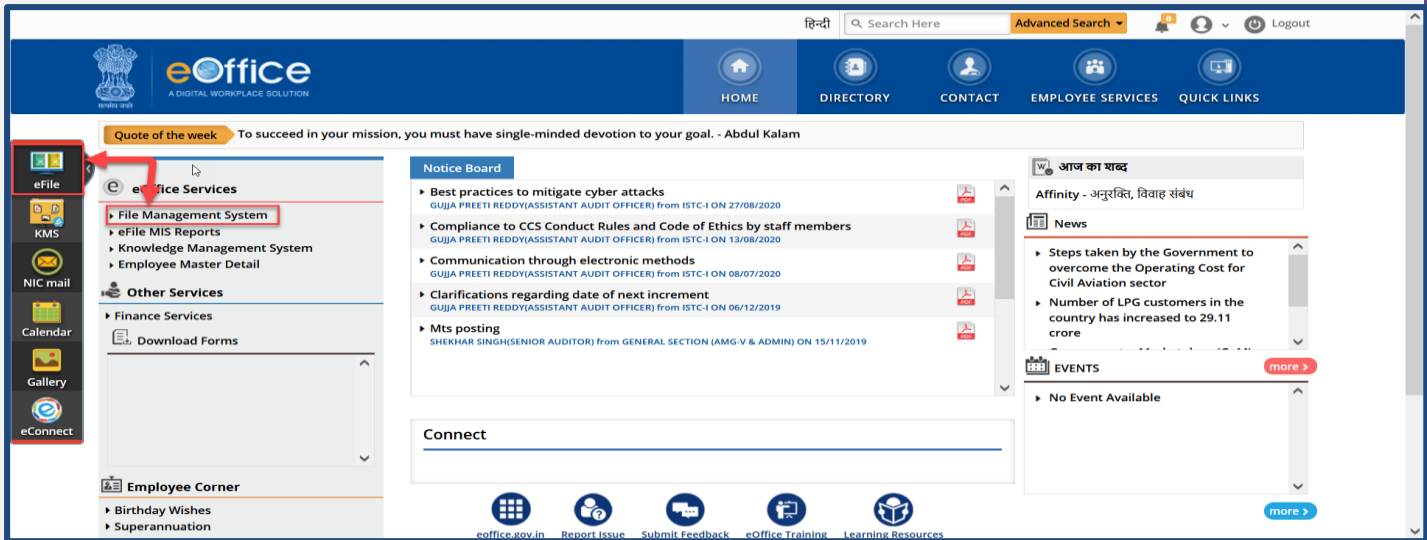
- Login with the same credentials used for login to NIC mail. Press the next button
- In the next screen select OTP on Mobile as 2nd Step Authentication.



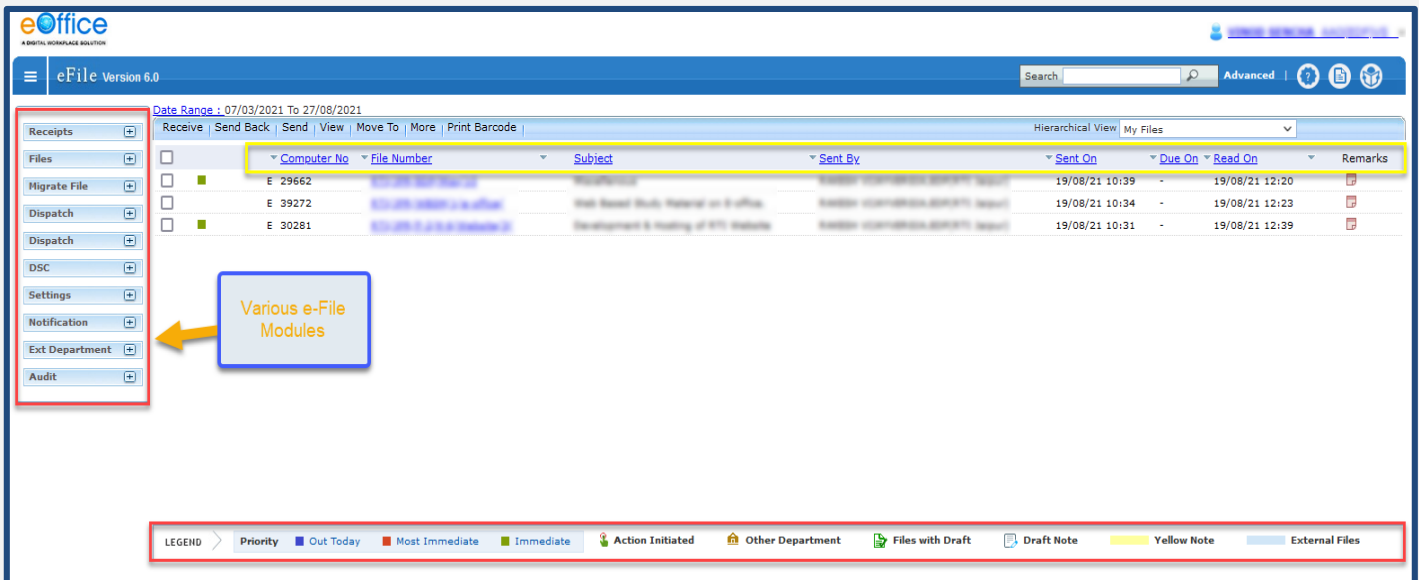
- An OTP will be sent on your registered Mobile Number. Enter the OTP received.



- After successful login it will be directed to the e-Office Home page.



- Click on e-file/File Management System. This will open your Files inbox module.



Note:-

- There is a Demo Version available for practice on e-office which can be accessed using URL <https://demo.eoffice.gov.in>. (Presently Not Available due to migration of e-office application to PARICHAY Platform on 07.09.2021.)
- Kindly use updated version of Mozilla Firefox or Internet Explorer for eFile application as some features of e-Office are not supported in other browsers (Chrome, Safari and Microsoft Edge etc.)

4. Create new e-File

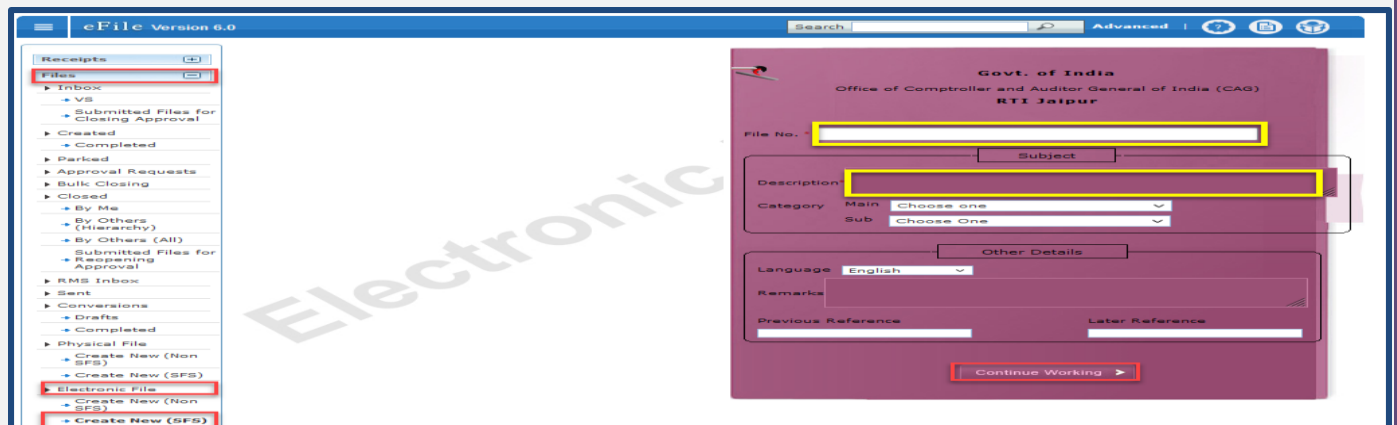
There are two categories of e-File: -

1. Physical File: - Physical File may be created for scanning the existing Manual Files used in office. There is no facility to Add new note and draft in a physical file.
2. Electronic File:- Electronic File is used to record the current correspondence directly through e-office.

Each categories of File have two sub categories:-

- a. Non SFS: - User must select the available file heads for the nomenclature of File.
- b. SFS: - User can enter File No. without any restriction or standards.

STEPS TO FOLLOW:



The screenshot displays the eFile Version 6.0 interface. On the left, the 'File' module is expanded, showing a tree view with 'Electronic File' and 'Create New (SFS)' highlighted. On the right, the 'Create New SFS' form is shown, featuring fields for 'File No.', 'Subject', 'Description', 'Category' (Main and Sub), 'Language', 'Remarks', 'Previous Reference', and 'Later Reference'. A 'Continue Working' button is at the bottom.

1. Click “Create New SFS” under Electronic File category from the “File” module
2. Enter the File-number. (**File No. should be unique**)
3. Enter Mandatory Description and provide other relevant details like Main Category, Sub-Category, Remarks, Previous References, Later References and Language.
4. Click Continue working to create a new file of selected Nature and Type.

Note:

- **File No.** once generated cannot be edited however other metadata can be edited any time by the users of Dealing Section of File.
- All other three categories of files can be created by following the same sequence of steps.
- Users are advised not to create e-file just for testing/training purpose. They can use demo version for testing/training.
- The practice of creating new SFS(Electronic) file is being used in IAAD.
- **Created Files** can be viewed from **Created**→**Completed** Sub module of File Module.

4.1 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 → Completed link under file module to view Created File listing.

The screenshot displays the eFile Version 6.0 interface. The top navigation bar includes a search field and 'Advanced' options. The main content area shows a list of files under the 'Completed' status. The table below is a representation of the data shown in the screenshot:

Computer No	File Number	Subject	Subject Category	Created On	Remarks
E 42104	RTI/PR/EDP/E-office/Training/021/	e-Office WBC Demonstration	E-OFFICE	12/09/21 02:45	-

The interface also features a left-hand navigation menu with various file management options, and a legend at the bottom for file status indicators such as Priority, Out Today, Most Immediate, Immediate, Action Initiated, Other Department, Files with Draft, Draft Note, Yellow Note, and External Files.

Note:

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

5. Diarisation

- As we know inward receipt is received in physical form (Dak or Letter) or by email.
- Diarisation is the process of registration of receipts in e-office.
- The unique number for each DAK/Letter/email is generated by the system, and further processing of the receipt is always electronic in nature.
- Let us first understand the diarisation of inward receipt received in Physical Form.

5.1 Diarisation of Physical Dak/Letter

- Browse and Diaries sub module of Receipt is used to generate Receipt.

Important Points:

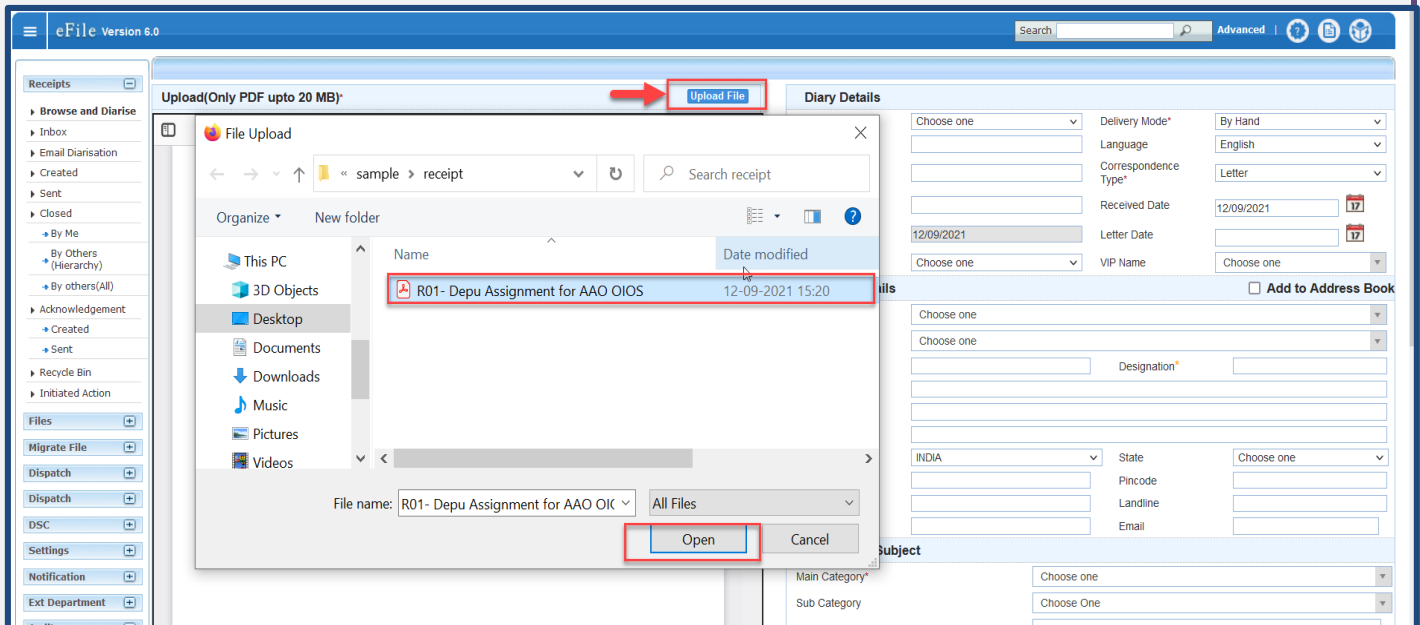
- ✓ Uploading of scanned document of DAK/Letter is mandatory for diarisation.
- ✓ DAK/Letter must be scanned as a single PDF (preferably a searchable PDF).

STEPS TO FOLLOW:

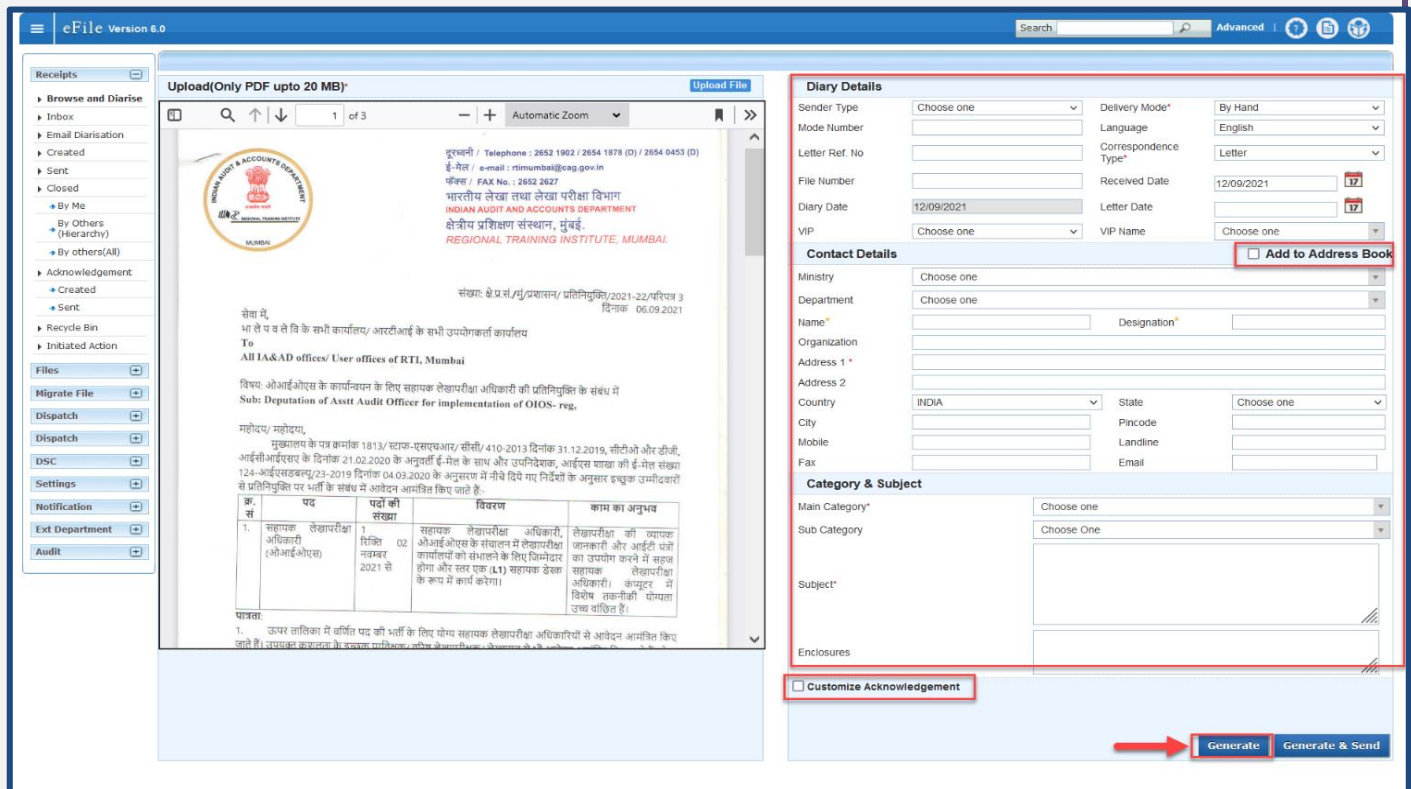
1. Click Browse & Diarize sub-module

The screenshot displays the eFile Version 6.0 interface. On the left, a sidebar contains navigation options such as 'Receipts', 'Browse and Diarize', 'Inbox', 'Email Diarisation', 'Created', 'Sent', 'Closed', 'By Me', 'By Others (Hierarchy)', 'By others(All)', 'Acknowledgement', 'Created', 'Sent', 'Recycle Bin', 'Initiated Action', 'Files', 'Migrate File', 'Diapatch', 'DSC', 'Settings', 'Notification', 'Exit Department', and 'Audit'. The main area is titled 'Upload(Only PDF upto 20 MB)' and features a search bar, a file upload icon, and a yellow arrow pointing to the 'Upload File' button. The right-hand panel is divided into 'Diary Details' and 'Contact Details' sections. The 'Diary Details' section includes fields for Sender Type, Mode Number, Letter Ref. No., File Number, Diary Date, and VIP. The 'Contact Details' section includes fields for Ministry, Department, Name, Designation, Organization, Address 1, Address 2, Country, State, City, Pincode, Mobile, Landline, and Email. Below these sections are 'Category & Subject' fields and a 'Customize Acknowledgement' checkbox. At the bottom right, there are 'Generate' and 'Generate & Send' buttons.

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



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



4. Click Generate to generate new electronic receipt with a unique Receipt No.

The screenshot shows the eFile Version 6.0 interface. The main window displays the receipt details for 'INDIAN AUDIT & ACCOUNTS DEPARTMENT, REGIONAL TRAINING INSTITUTE, MUMBAI'. The receipt number '194794/2021/EDP(RTI Jaipur)' is highlighted in a red box. The interface includes a navigation menu on the left, a central content area with the receipt text and a table, and a right-hand panel with 'Receipt Details' and 'Movement Details' sections.

क्र. सं.	पद	पदों की संख्या	विवरण	काम का अनुभव
1.	सहायक लेखापरीक्षा अधिकारी (ओआईओएस)	1	सहायक लेखापरीक्षा अधिकारी, ओआईओएस के संचालन में लेखापरीक्षा कार्यालयों को संभालने के लिए जिम्मेदार होगा और स्तर एक (L1) सहायक डेस्क के रूप में कार्य करेगा।	लेखापरीक्षा की व्यापक जानकारी और आईटी धर्मों का उपयोग करने में सहायक लेखापरीक्षा अधिकारी। कंप्यूटर में

Note:-

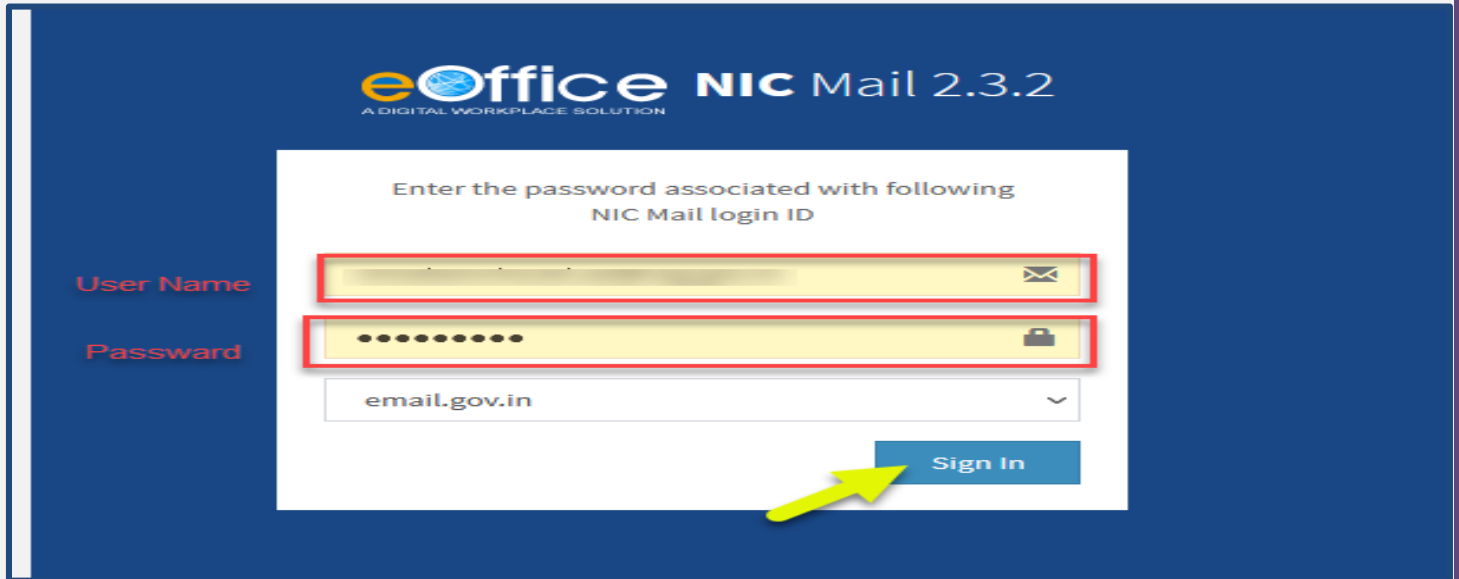
- All the mandatory fields are marked with asterisk (*).
- Personalize Acknowledgment: There is a provision to send acknowledgement to the sender who's DAK/ letter has been received in the organization.
- Generate: Creates the receipt and saves it in 'Created' sub module.
- Generate & Send: Generates the Receipt No. and redirects to Receipt Send screen.

5.2 Email Diarisation

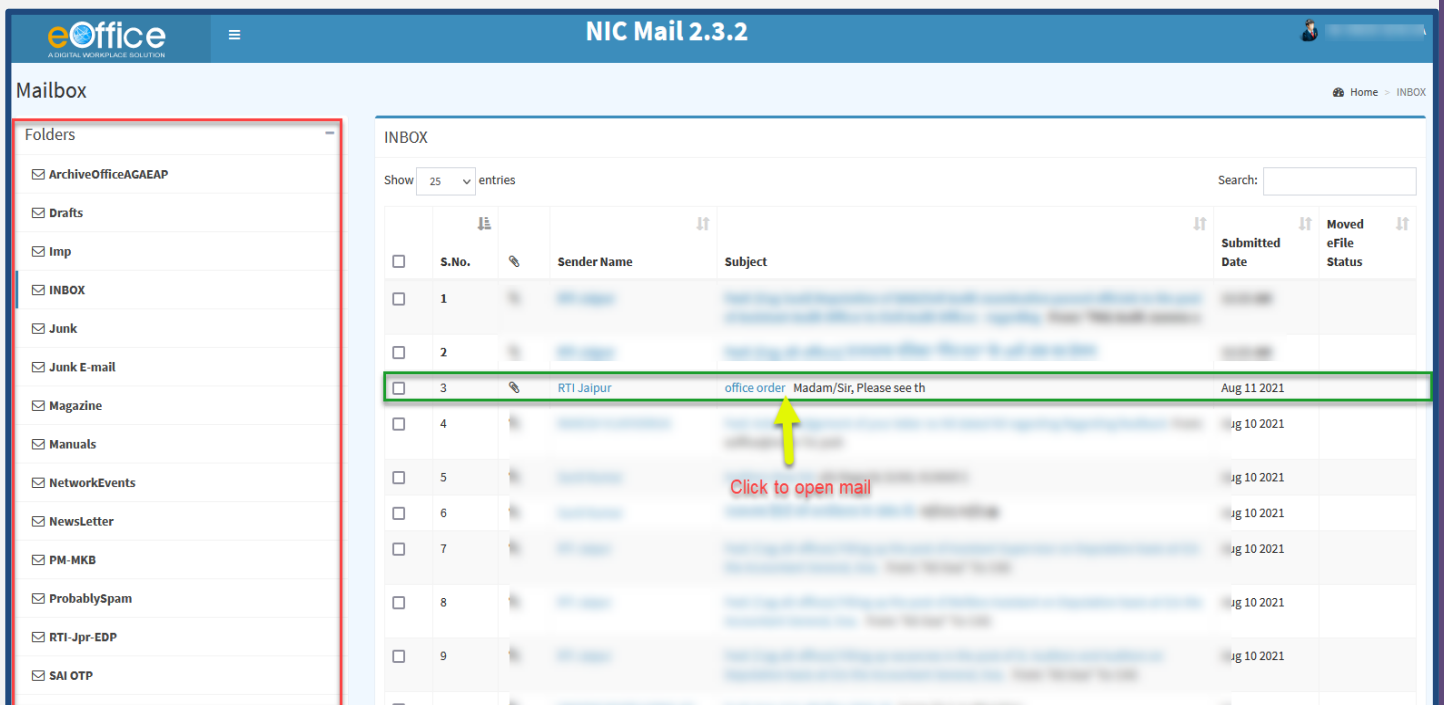
- This feature allows user to view and diaries Email received on their official email (NIC Email)

STEPS TO FOLLOW:

1. Go to [e-office Home page](#)
2. Click on NIC mail

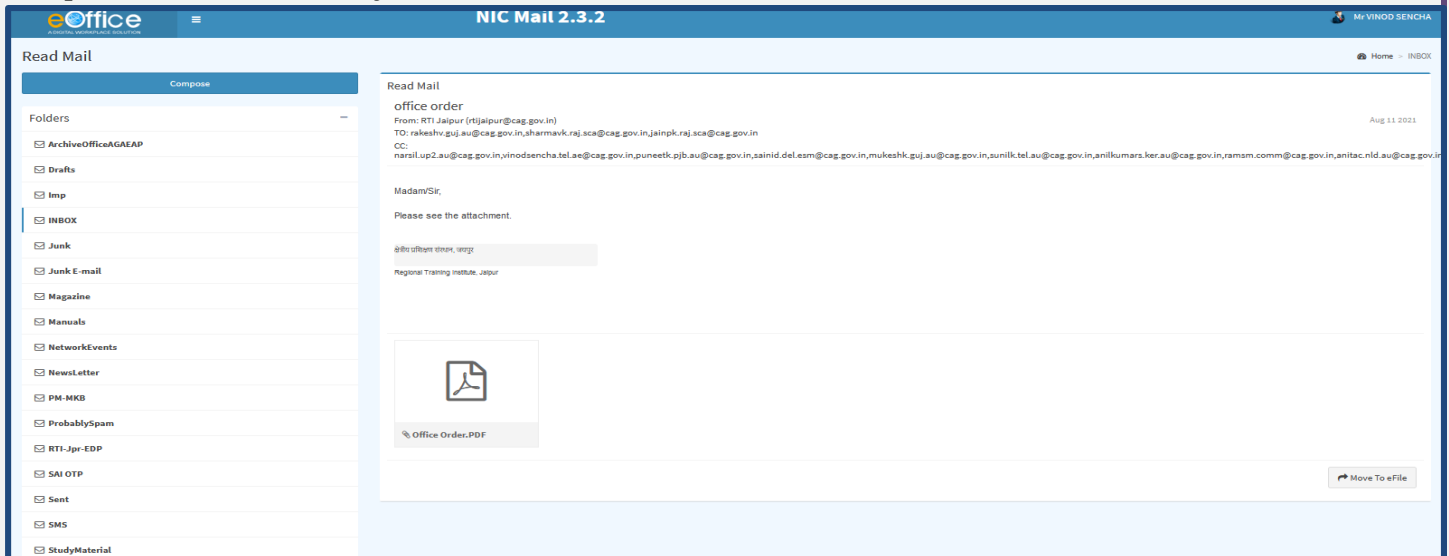


3. Fill the login credentials → Click Sign In
4. This will open your NIC e-mail mailbox (inbox).

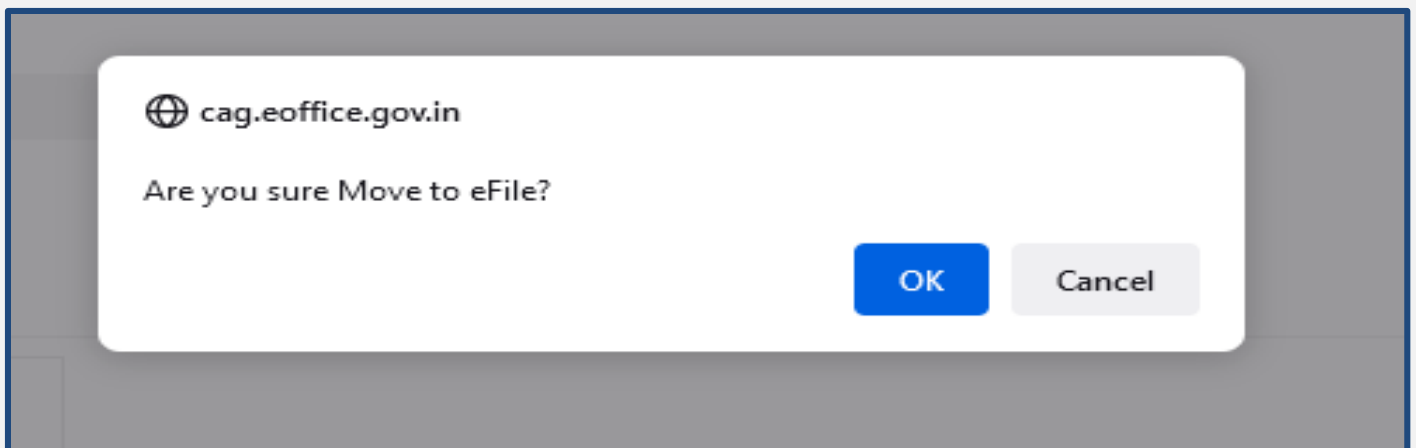


S.No.	Sender Name	Subject	Submitted Date	Moved eFile Status
1				
2				
3	RTI Jaipur	office order Madam/Sir, Please see th	Aug 11 2021	
4			Aug 10 2021	
5			Aug 10 2021	
6			Aug 10 2021	
7			Aug 10 2021	
8			Aug 10 2021	
9			Aug 10 2021	

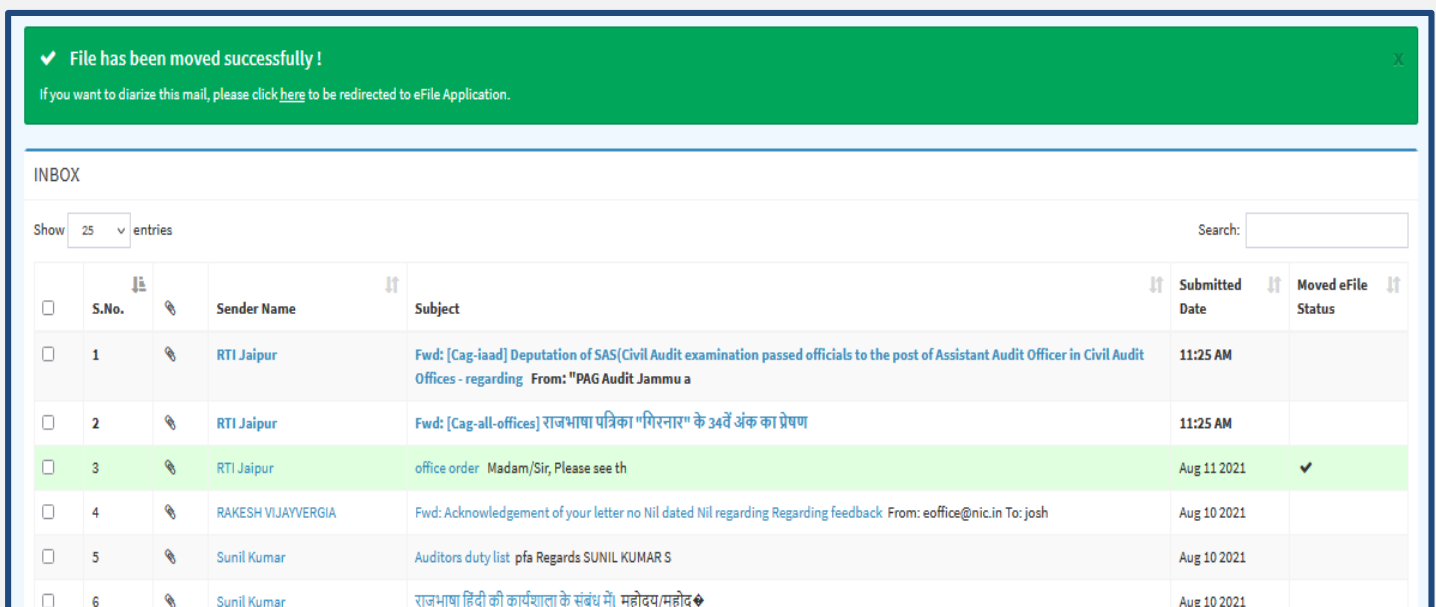
5. Open the mail which you want to diarize



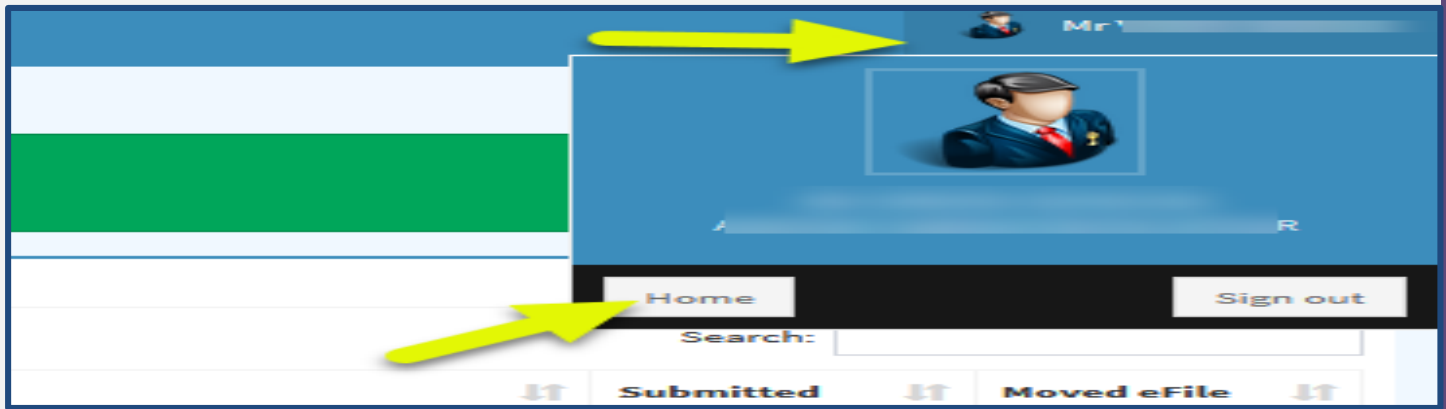
6. Click on move to e-File → It will ask for confirmation → Click ok



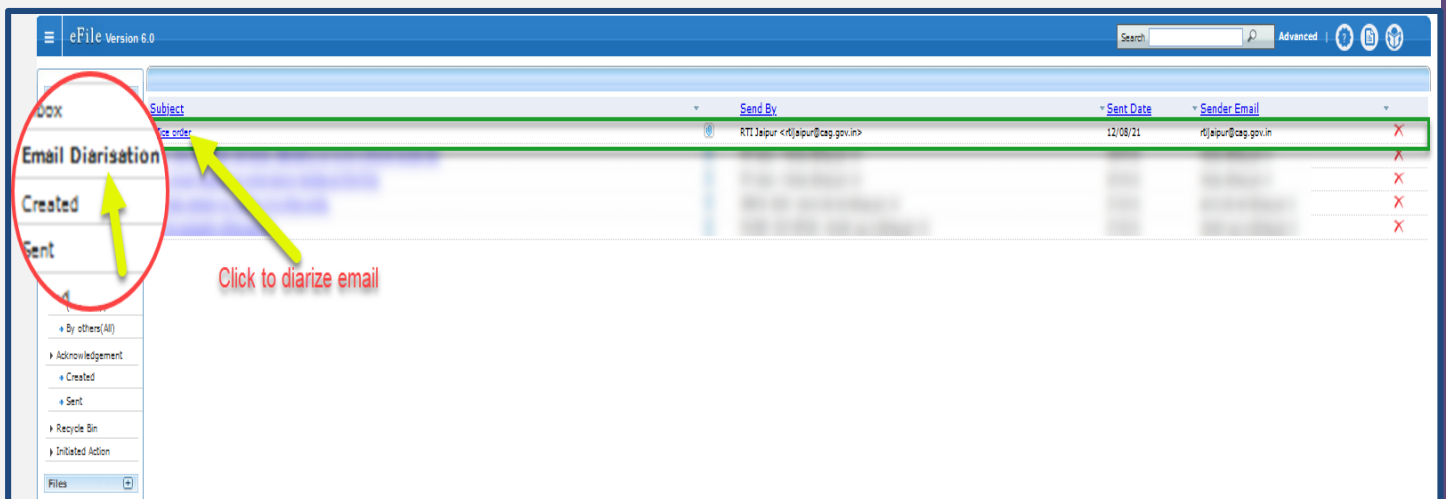
7. This will move your email receipt to e-office.



8. Now you can logout/redirect to [e-office home page](#).



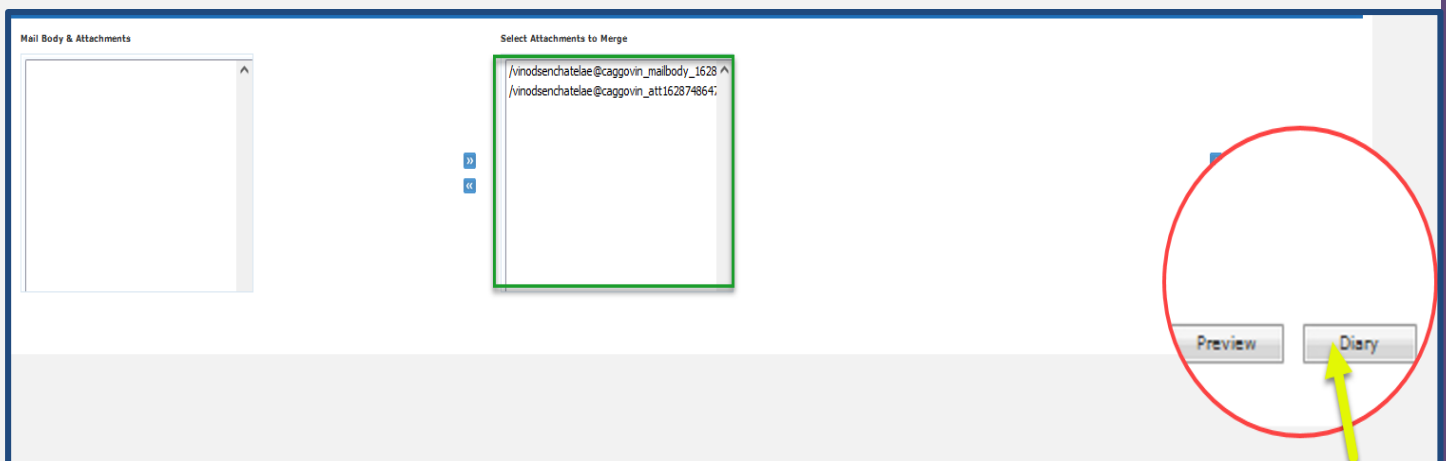
9. Go to e-file → Receipts Module → Email Diarisation



10. Open the imported email.

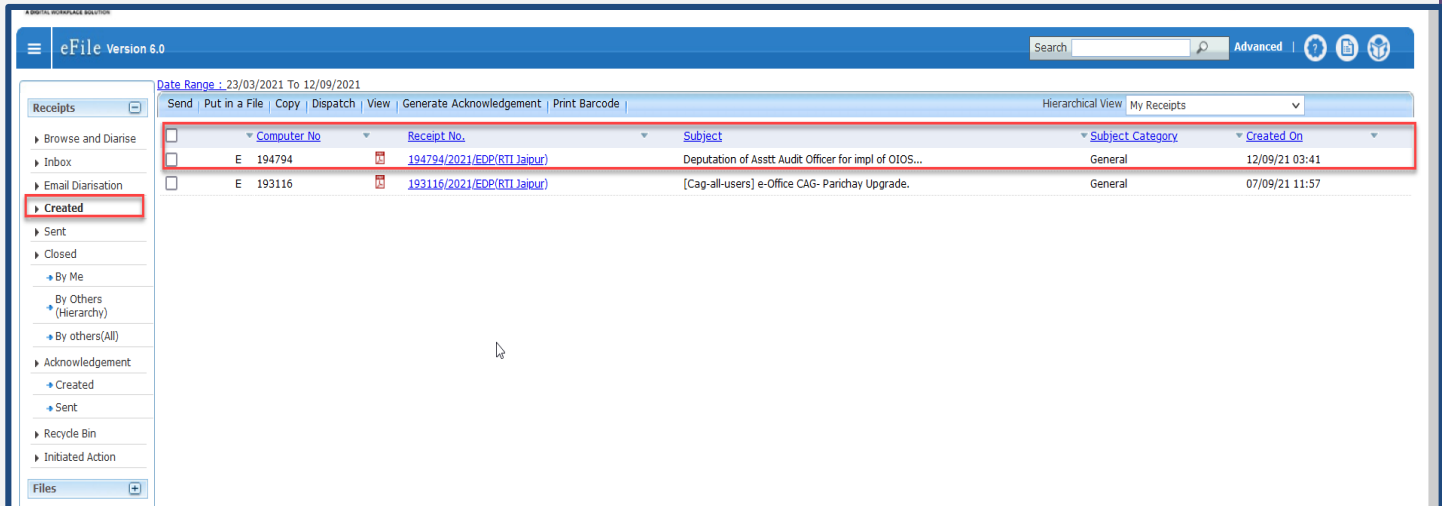
11. Select the require attachment

12. Click on Diary. (you can also preview of selected documents by using preview button)



5.3 Created Receipt List


- The Created sub module displays the list of all generated Receipts that are not yet Marked/Sent.
- To view list of receipts created, Click Created sub module of Receipt module.



The screenshot shows the eFile Version 6.0 interface. The left sidebar has a 'Receipts' section with a 'Created' sub-module highlighted. The main area displays a table of receipts with the following columns: Computer No., Receipt No., Subject, Subject Category, and Created On. The table contains two rows of data:

Computer No.	Receipt No.	Subject	Subject Category	Created On
E 194794	194794/2021/EDP/RTI Jaipur	Deputation of Asstt Audit Officer for impl of OIOS...	General	12/09/21 03:41
E 193116	193116/2021/EDP/RTI Jaipur	[Cag-all-users] e-Office CAG- Parichay Upgrade.	General	07/09/21 11:57

Description:

- The Created list of receipts displays information such as, Nature of Receipt (E/P), Computer No., Receipt No., Subject, Subject Category, and Created On
- The list of receipts can be sorted on the basis of Computer No, Subject, Subject Category and Created On by clicking on column heads.
- 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
 - Dispatch
 - view
 - Generate Acknowledgement

Receipt Inner Page

- Click a receipt number in Created submodule of Receipt module:

The screenshot displays the eFile system interface. On the left, a sidebar menu shows the 'Created' submodule selected. The main area shows a receipt with the following details:

- Sender: दुरध्वनी / Telephone : 2652 1902 / 2654 1878 (D) / 2654 0453 (D)
- E-mail: rtimumbai@cag.gov.in
- FAX No.: 2652 2627
- Organization: भारतीय लेखा तथा लेखा परीक्षा विभाग (INDIAN AUDIT AND ACCOUNTS DEPARTMENT)
- Address: क्षेत्रीय प्रशिक्षण संस्थान, मुंबई (REGIONAL TRAINING INSTITUTE, MUMBAI)
- Date: 06.09.2021
- Subject: विषय: ओआईओएस के कार्यान्वयन के लिए सहायक लेखापरीक्षा अधिकारी की प्रतिनियुक्ति के संबंध में (Sub: Deputation of Asstt Audit Officer for implementation of OIOS- reg.)

On the right, the 'Diary Details' form is visible, containing fields for Sender Type, Mode Number, Letter Ref No, File Number, Diary Date, VIP, Contact Details (Ministry, Department, Name, Designation, Organization, Address, City, State, Country, Pincode, Landline, Email), and Category & Subject.

Description:

- Menu Bar** – Various actions that can be taken on the receipt are available in the menu bar. These action buttons are as follows –
 - 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.
 - 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.
 - 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 the sender or on similar subject. With updating little information after using COPY (if required) a new receipt can be generated.
 - Dispatch** – This will dispatch the created receipt to receipt inbox.

e) **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 Subject, Diary Date, Receipt No., list of Drafts prepared, List of letters Dispatched against it, Attached/Detached Receipts/Files, Closed History, Movement details, etc.

f) **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.

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

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

2. **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.

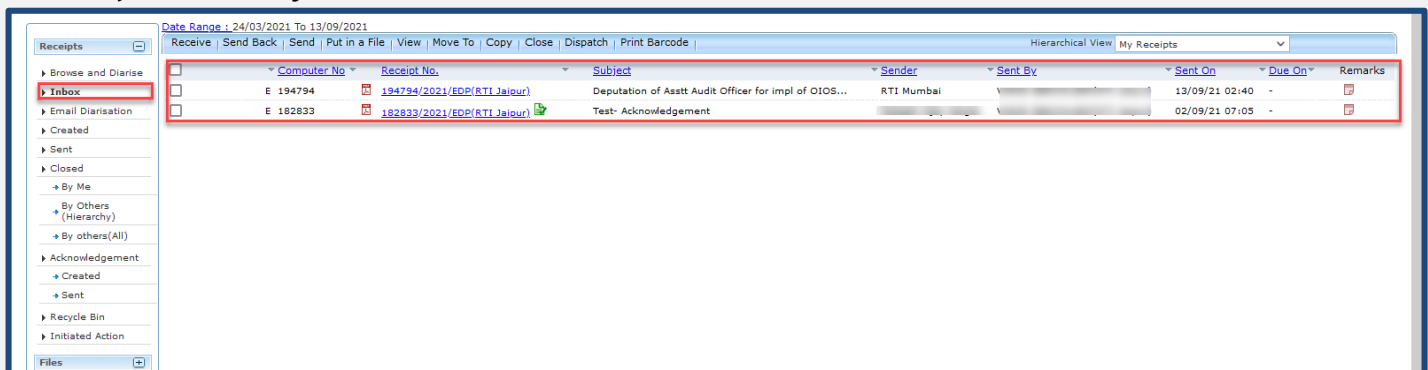
3. **Receipt Meta Data**

5.4 Receipt Inbox

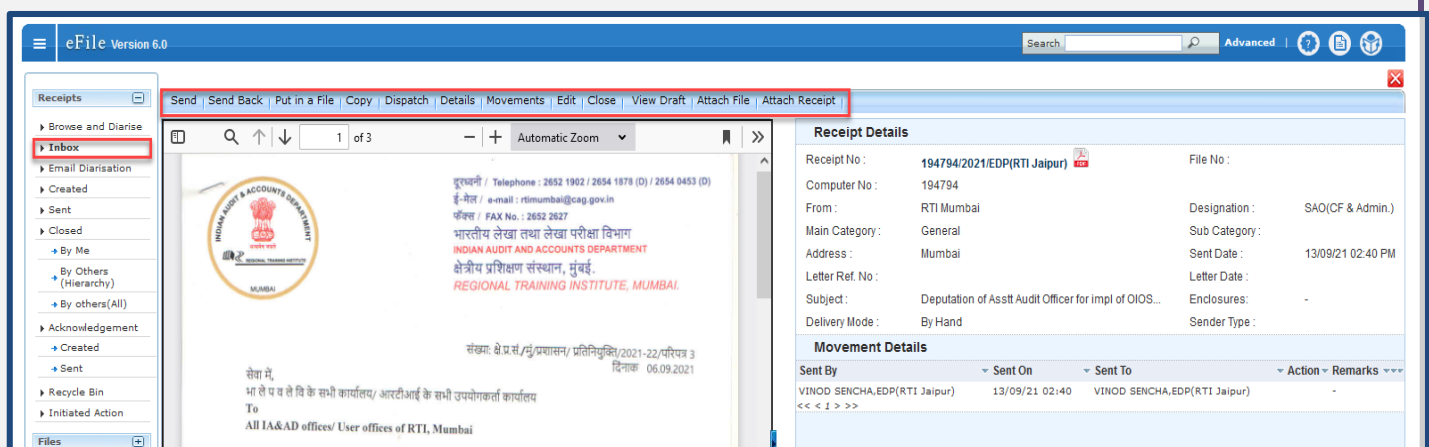
- The Receipt Inbox sub module displays list of all the incoming receipts that have been marked to the logged in user for further necessary action.
- The receipts in Inbox are in active state pending for necessary disposal.
- To view list of receipts received, Click Inbox sub module of Receipt module.

Description:

- The Inbox list of receipts displays information such as, Computer No., Receipt No., Subject, Sent By, Sent On, Due On



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



- The following actions that can be performed on INBOX receipts –
 1. Send
 2. Send Back
 3. Put in a File
 4. Close

6. Send Receipt

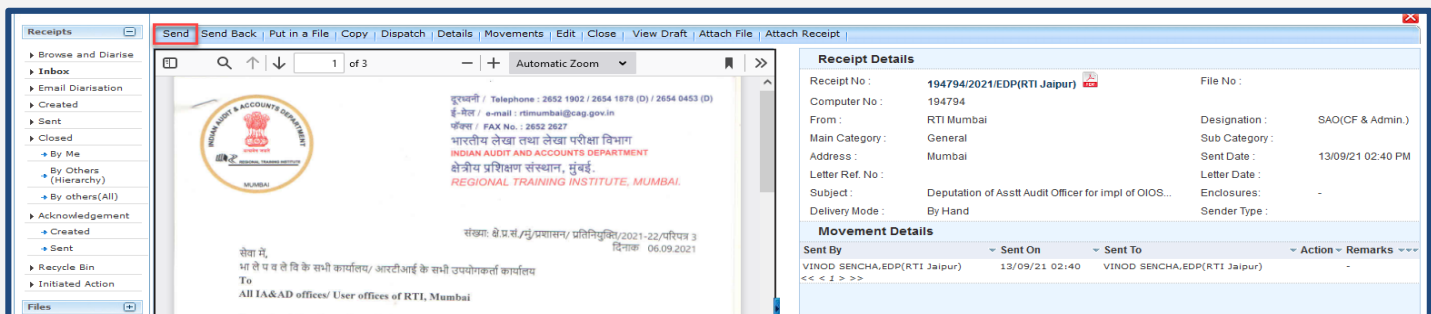
- This section describes how to forward or mark a receipt to another user in an organization or to an external organization.
- Receipts which are in pending state, i.e. receipts in Inbox/Created and Send can be forwarded further.
- Closed receipts are required to be re-opened first before forwarding.

Important Points:

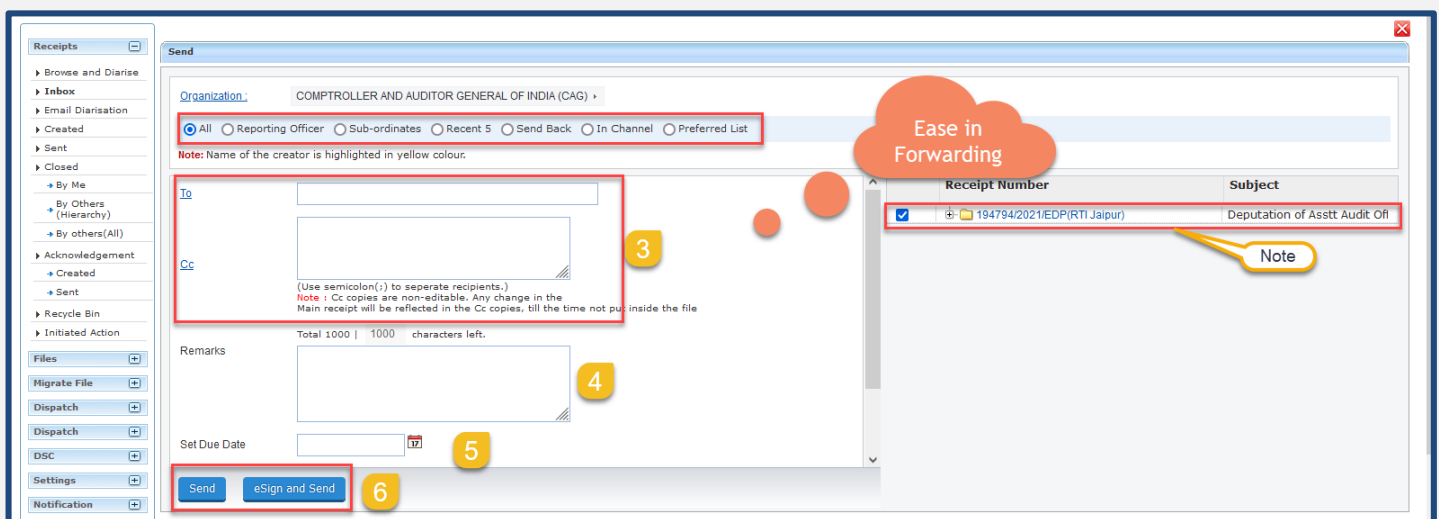
- ✓ Receipt can be forwarded to only one user in 'To' and multiple in CC.
- ✓ Multiple receipts can be sent by selecting multiple receipts from **Inbox** and **Created** list page.
- ✓ Receipts forwarded from **Sent** list, are sent as CC (copy) of the main receipt.

STEPS TO FOLLOW:

1. Select receipt(s) or click opens a receipt from Inbox/Created list.



2. Click 'Send' menu.



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. Enter Remarks.
5. If necessary, you may assign Due date to the receipt.
6. Click –
 - ‘Send’ –To send the receipt without signing digitally.
 - ‘eSign & Send’ –To digitally sign and send using AADHAR based eSign services.
 - i. Read and agree to the ‘Consent for Authentication form’ to proceed and then you are redirected to the eSign service portal.
 - ii. Enter your Aadhaar Number/Virtual ID and Click ‘Get OTP’.
 - iii. Enter the OTP received on the registered (with AADHAR) mobile number.
 - iv. Click ‘Submit’ to eSign and Send.

KEY POINTS:

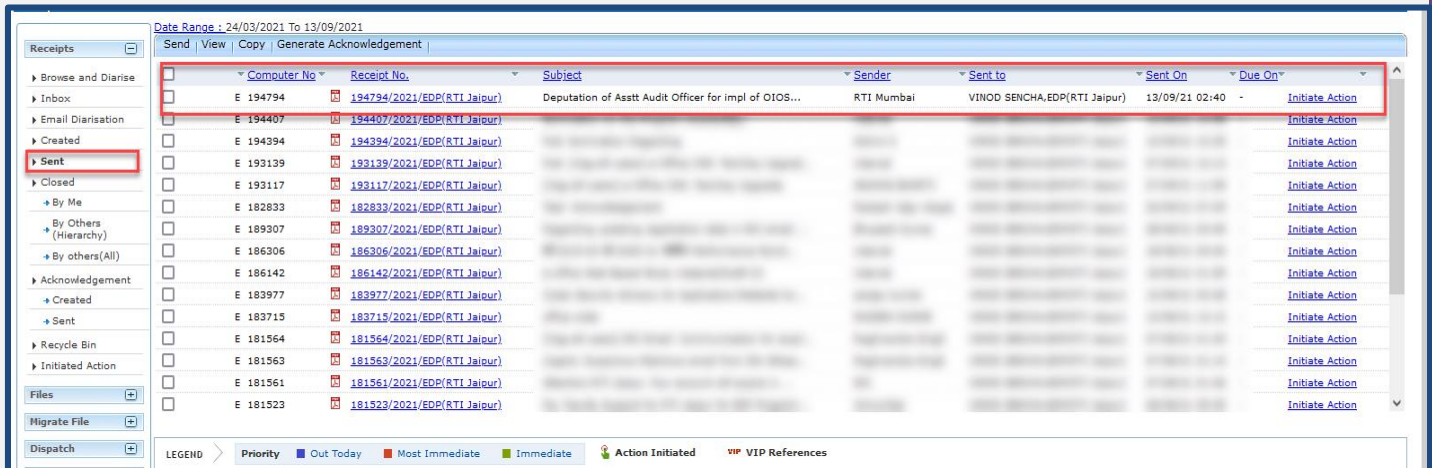
- Ease in Forwarding – Provision of segregated send To and CC employee list to choose from, based on –
 - a) Recent 5 – List of last five employees/users to whom receipts have been forwarded
 - b) In Channel – List of employees already in channel of submission/movement of the receipt.
 - c) Sub-ordinates – 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.

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)/2021/EDP Section.
Sequence number – 101 Copy number - 2
Year of Creation - 2021
Section/Office- EDP Section

6.1 Receipt Sent List

- The Sent box displays the list of receipts 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.



Date Range : 24/03/2021 To 13/09/2021
Send | View | Copy | Generate Acknowledgement

Computer No.	Receipt No.	Subject	Sender	Sent to	Sent On	Due On	Action
E 194794	194794/2021/EDP(RTI Jaipur)	Deputation of Asstt Audit Officer for impl of OIOS...	RTI Mumbai	VINOD SENCHA,EDP(RTI Jaipur)	13/09/21 02:40		Initiate Action
E 194407	194407/2021/EDP(RTI Jaipur)						Initiate Action
E 194394	194394/2021/EDP(RTI Jaipur)						Initiate Action
E 193139	193139/2021/EDP(RTI Jaipur)						Initiate Action
E 193117	193117/2021/EDP(RTI Jaipur)						Initiate Action
E 182833	182833/2021/EDP(RTI Jaipur)						Initiate Action
E 189307	189307/2021/EDP(RTI Jaipur)						Initiate Action
E 186306	186306/2021/EDP(RTI Jaipur)						Initiate Action
E 186142	186142/2021/EDP(RTI Jaipur)						Initiate Action
E 183977	183977/2021/EDP(RTI Jaipur)						Initiate Action
E 183715	183715/2021/EDP(RTI Jaipur)						Initiate Action
E 181564	181564/2021/EDP(RTI Jaipur)						Initiate Action
E 181563	181563/2021/EDP(RTI Jaipur)						Initiate Action
E 181561	181561/2021/EDP(RTI Jaipur)						Initiate Action
E 181523	181523/2021/EDP(RTI Jaipur)						Initiate Action


LEGEND > Priority ■ Out Today ■ Most Immediate ■ Immediate 🟢 Action Initiated 🟡 VIP VIP References

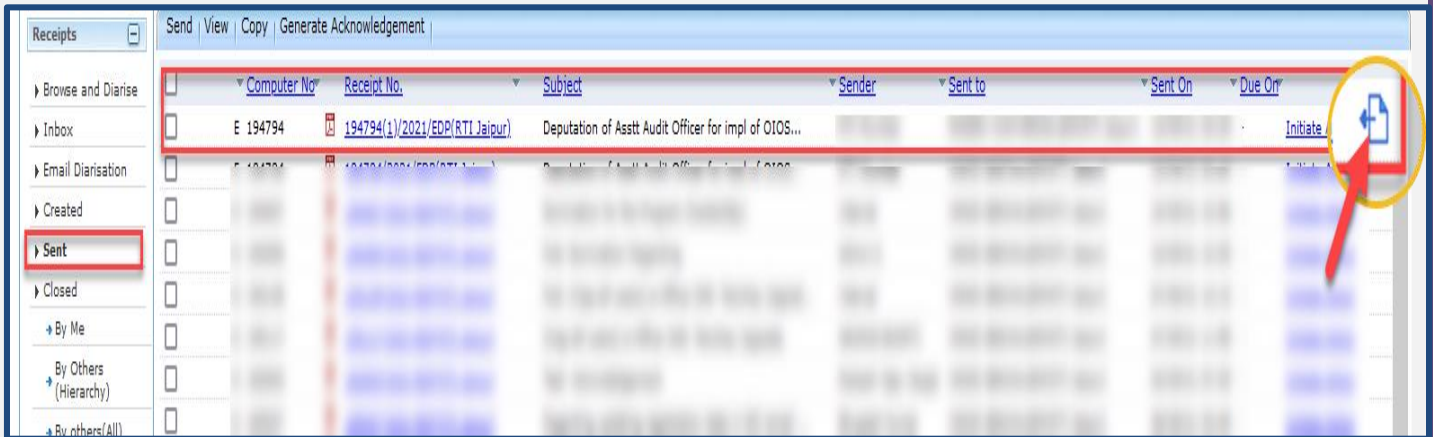
- To view list of receipts sent, click 'Sent' under Receipts module.
- The Sent list of receipts displays information such as Computer No., Receipt Number, Subject, Sender (Sender of the DAK/Letter), Sent To, Sent On, and Due On.
- The list of receipts can be sorted based on Computer No., Sent On and Created On by clicking on column heads.
- The following actions that can be performed on the list of Sent receipts –
 - Send,
 - Copy,
 - Generate Acknowledgement.
- Further, more details on a receipt such as its diarized letter and other information can be viewed by clicking on the Receipt No.

6.2 Receipt Pull Back

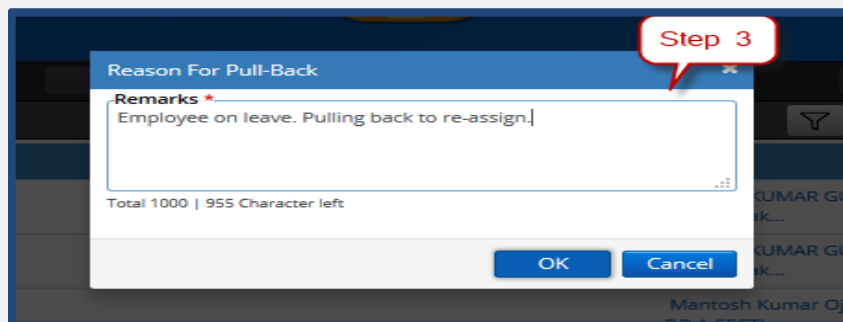
- To Pull Back a receipt is to call it back from the user to whom it was marked by the user, before it reaches in their hands.
- This may be required in case-scenarios where user forwards the receipt to an unintended person mistakenly, or the person is un-available so the subject matter (receipt) may be pulled back and re-assigned to someone else.
- This can only be done until the recipient has not opened the receipt.
- '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  corresponding to the receipt number to be pulled back.



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



Note:

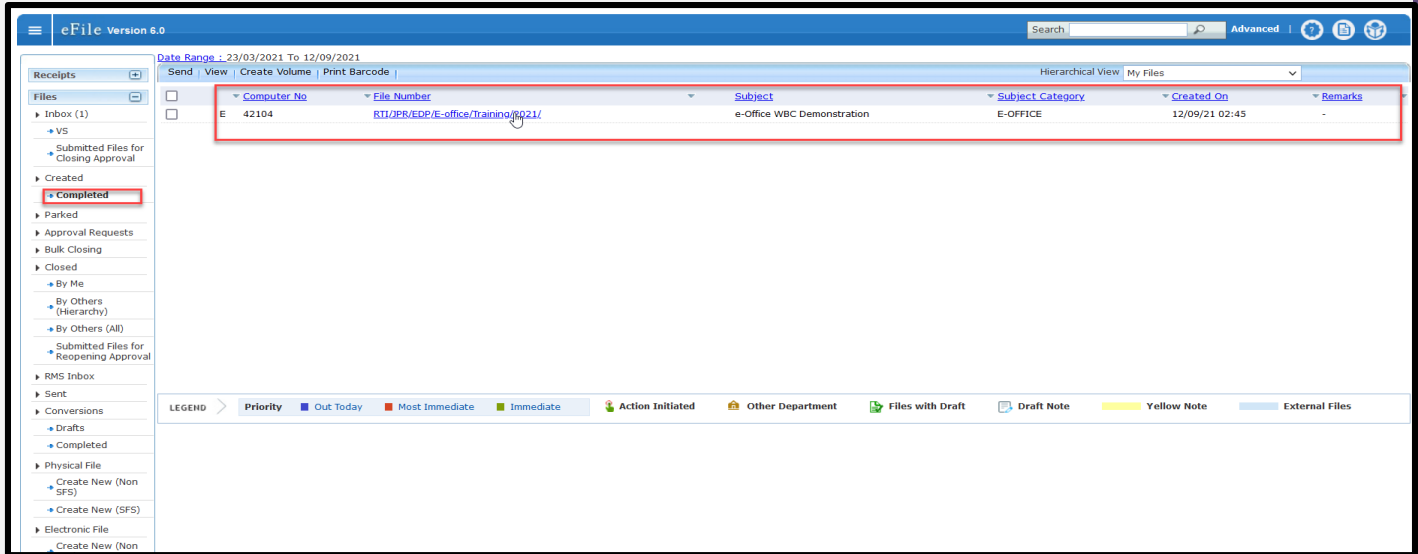
- The pulled back receipts will be moved to the respective folders from which it was sent (Inbox/Created).

7. Put a Receipt inside a File

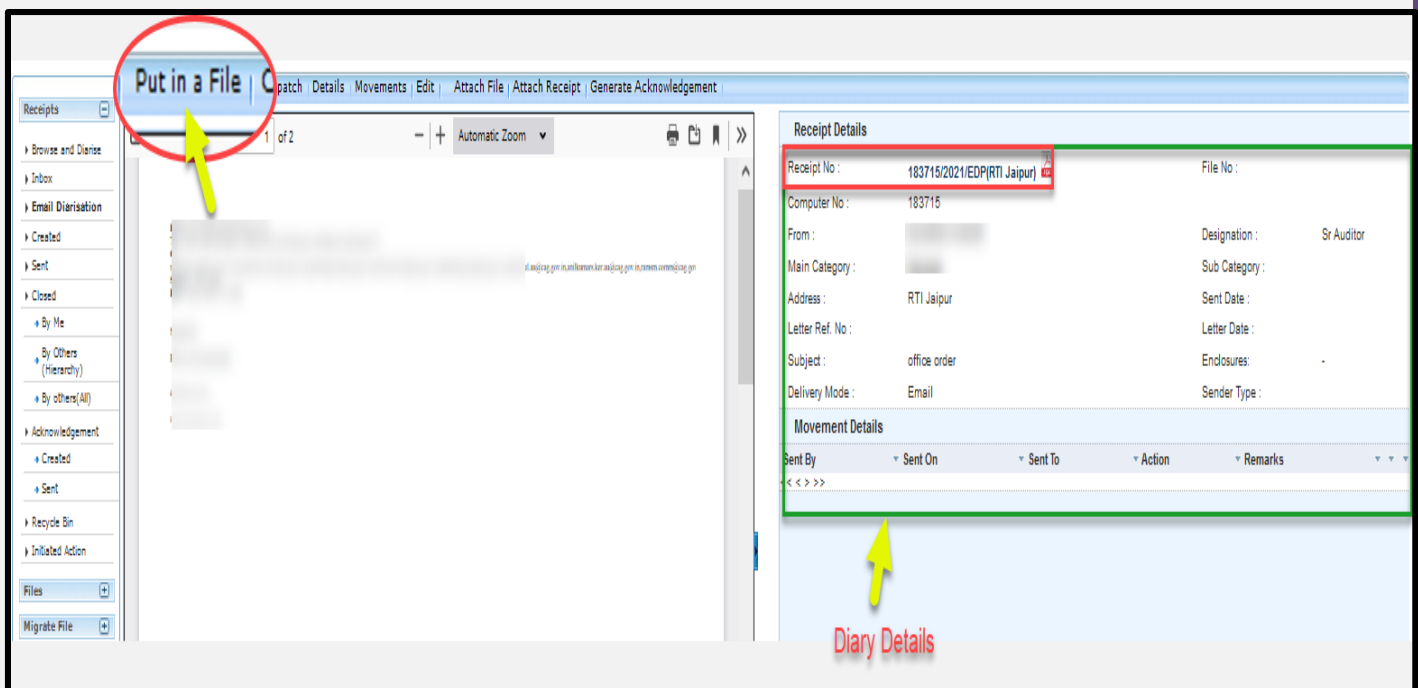
- To record decisions on the note sheet against a receipt, it is necessary that the receipts may be put inside a file as correspondence.
- This section describes how to put up a receipt in a file.

STEPS TO FOLLOW:

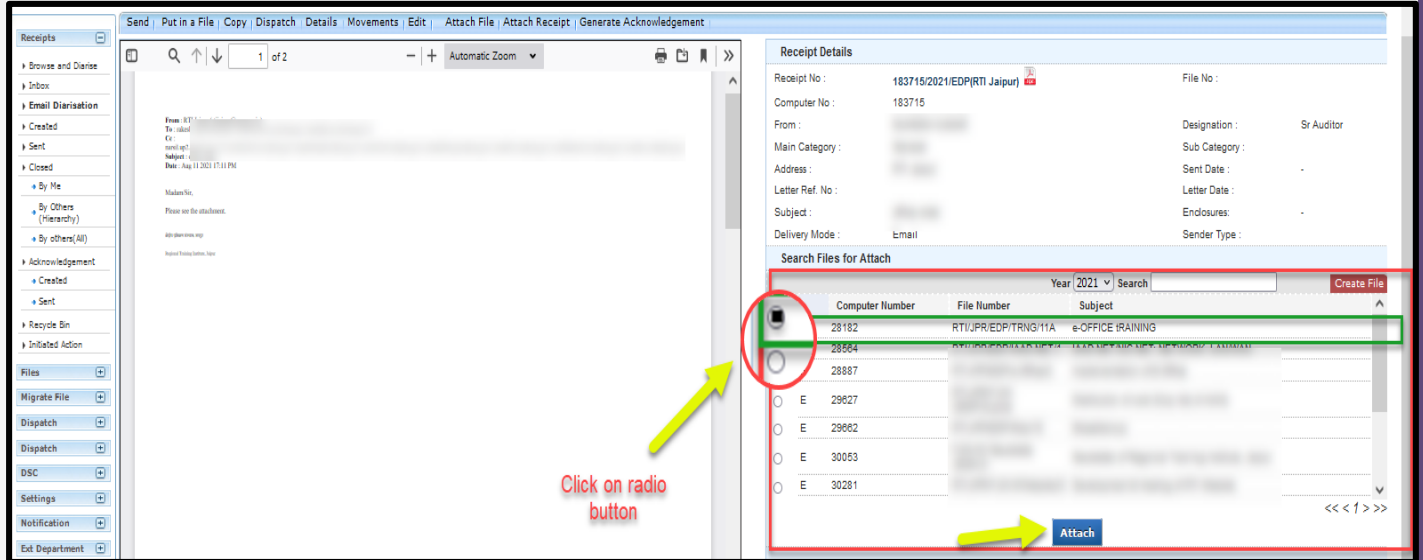
1. Select receipt or Click open receipt, from receipt Inbox or Created list.



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



3. To put the receipt in an existing file already available, select or search the file from list displayed.

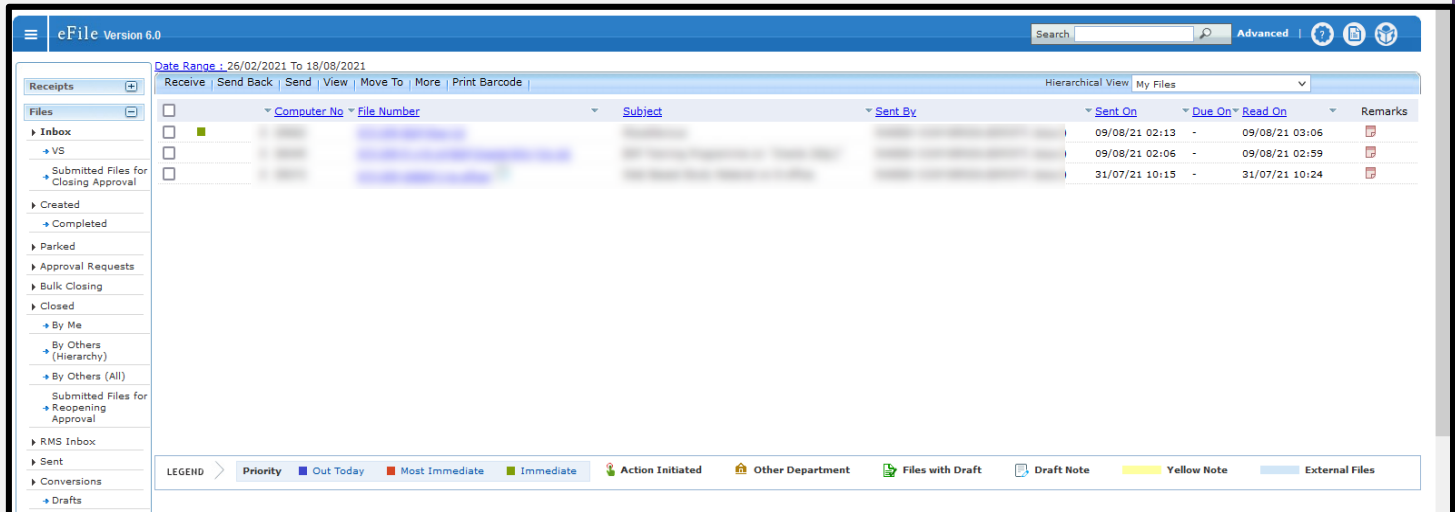


4. Click Attach as shown in:

5. This will attach diarized receipt to the selected file.

8. File Submission

- The File Inbox contains 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.



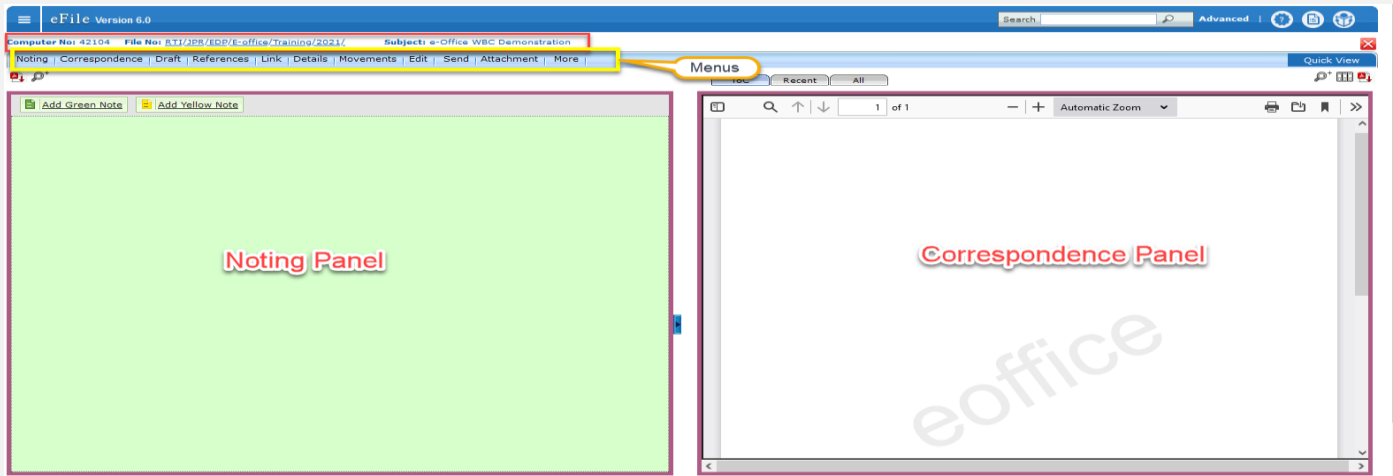
The screenshot displays the eFile Version 6.0 interface. At the top, there is a search bar and a date range filter set to '26/02/2021 To 18/08/2021'. Below this, a navigation menu includes 'Receive', 'Send Back', 'Send', 'View', 'Move To', and 'More'. The main content area shows a table of file submissions with columns for 'Computer No.', 'File Number', 'Subject', 'Sent By', 'Sent On', 'Due On', 'Read On', and 'Remarks'. A legend at the bottom identifies various file types and priorities by color: Priority (blue), Out Today (orange), Most Immediate (red), Immediate (green), Action Initiated (purple), Other Department (yellow), Files with Draft (light blue), Draft Note (light green), Yellow Note (yellow), and External Files (light blue).

Computer No.	File Number	Subject	Sent By	Sent On	Due On	Read On	Remarks
				09/08/21 02:13	-	09/08/21 03:05	
				09/08/21 02:06	-	09/08/21 02:59	
				31/07/21 10:15	-	31/07/21 10:24	

- Fields like Nature of File (E/P), Computer No., File Number, Subject, Sent By, Sent On, Due On, Read on and Remarks are displayed.
- Actions like Send Back, Send, View, Move To can be taken.
- File inner page can be viewed by clicking on File Number.
- List of Files can be sorted based on Computer No., Sent On and Due On by clicking on respective Heading
- Legends and Color Code is used to differentiate various files in list.

8.1 Electronic File Inner page

- Electronic File Inner page can be opened by clicking on File no. link from Inbox/**Created**.
- Electronic File Inner pages displays Computer No., File No., Subject, Noting Panel, Correspondence panel and various menus to work on file.



Menus:

1. Draft: Clicking Draft menu will display Create New and View Draft sub menu.
 - a. Clicking Create new sub menu of Draft, will open Draft editor page.
 - b. Clicking View Draft sub menu of Draft will open List of Draft Created on Right Panel.
2. References
3. Link: Clicking Link Menu will open Linked Files List with option to Link Files.
4. Details: Clicking Details will open Detail Page of File.
5. Movements: Clicking Movements will open Movement page of File
6. Edit: Clicking Edit will open File Cover Page to edit Meta data of File.
7. Send Back: Clicking Send Back will open file send page with name of Sender of File auto populated in To Field.
8. Send: Clicking Send will open Send page of File
9. Attachment: Clicking on sub menu Attach File/ Receipt will open File/Receipt Attachment Page.

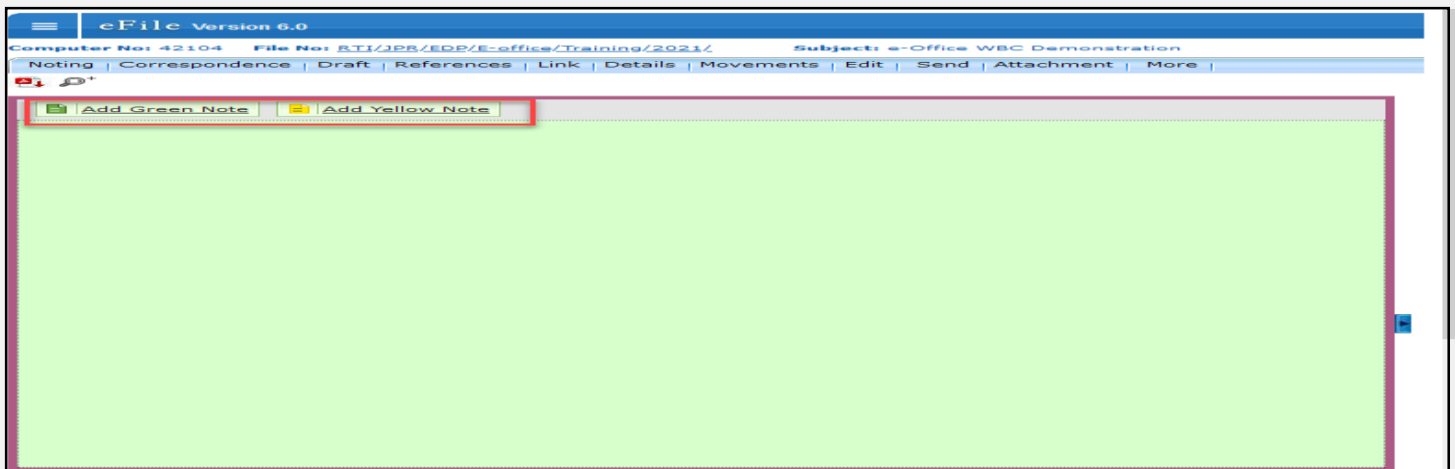
10. More

- 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.

Note:

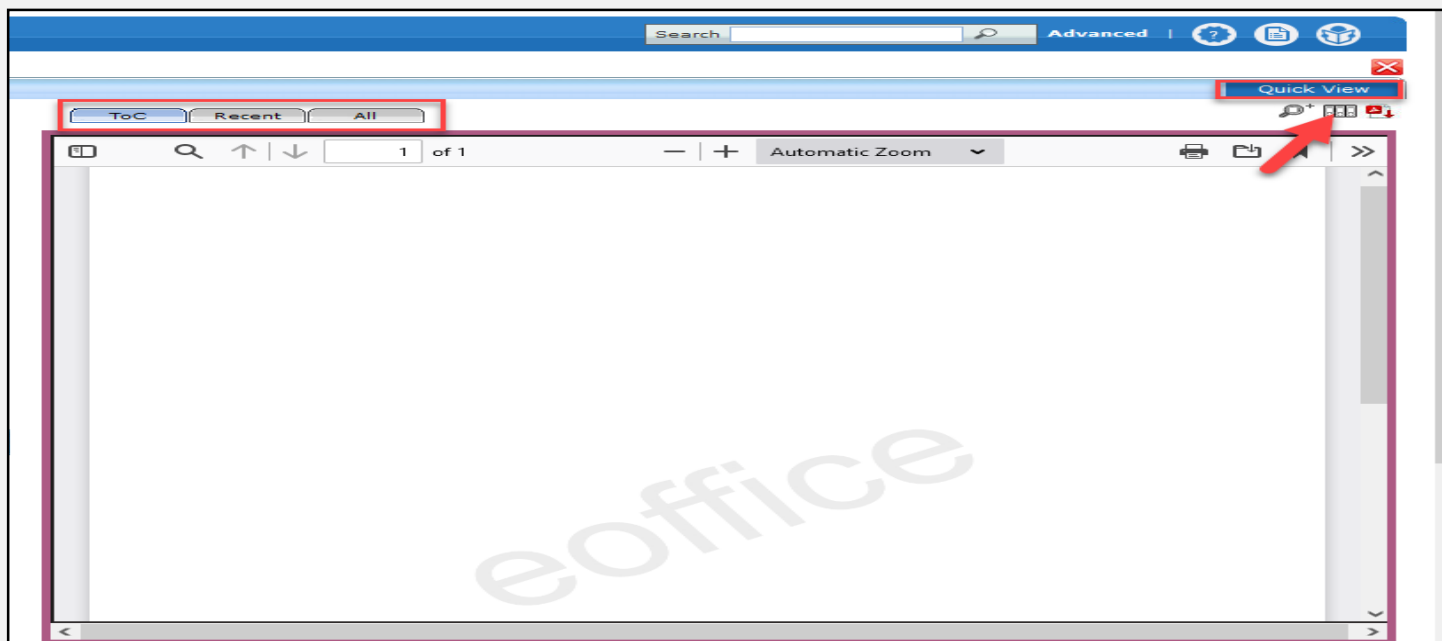
- Menus/Action Buttons which are not applicable in currently opened file will remain inactive
- Print/Download: Clicking on Download will display a Print/Download page to View or Download Complete/Customized File, Noting, Correspondences, DFA, Local Reference, Movement History and Action Detail.

Actions on Left Panel (Noting Panel)



- 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.

Actions on Right Panel



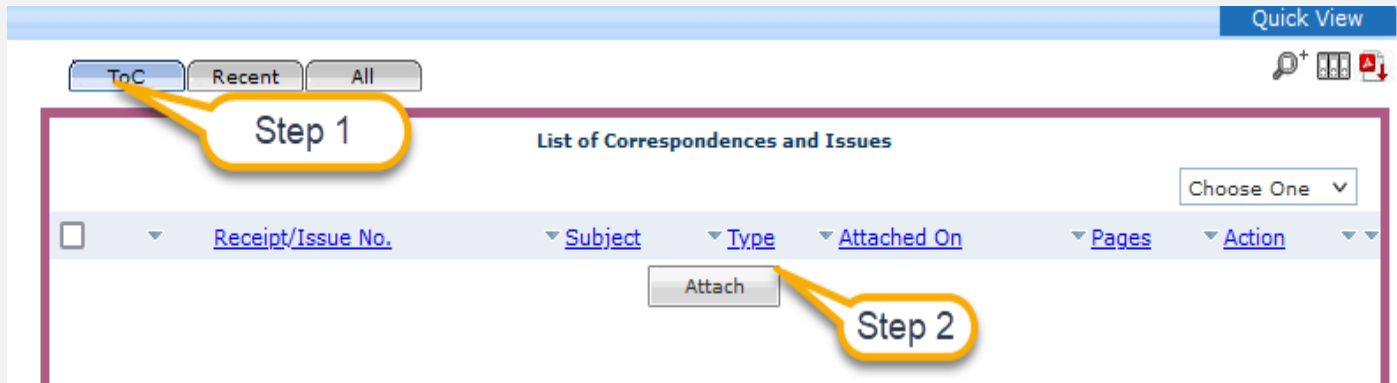
- **ToC (Correspondence List):** Clicking ToC menu icon will open List of Correspondence attached within a File.
- **Recent:** Clicking on Recent menu icon will display latest attached correspondence in PDF format with option to navigate all the attached correspondences.
- **All:** Clicking on All menu icon will display all attached correspondence in PDF format.
- **Previous Noting:**
 - Available only while writing Note
 - Clicking on Previous Noting menu icon will display all Previous Noting.
- **Referencing Icon:** Clicking on Reference Icon will provide option to refer previous note or attached correspondence in Green or Yellow note in file.
- **Quick View:**
 - There are 3 sub menu under this menu, Noting, Correspondence TOC and Draft TOC.
 - By clicking any sub menu will open the respective panel in new pop up window.
 - This is very useful during the making of note and draft to view other panel.

8.2 Add Correspondence in File

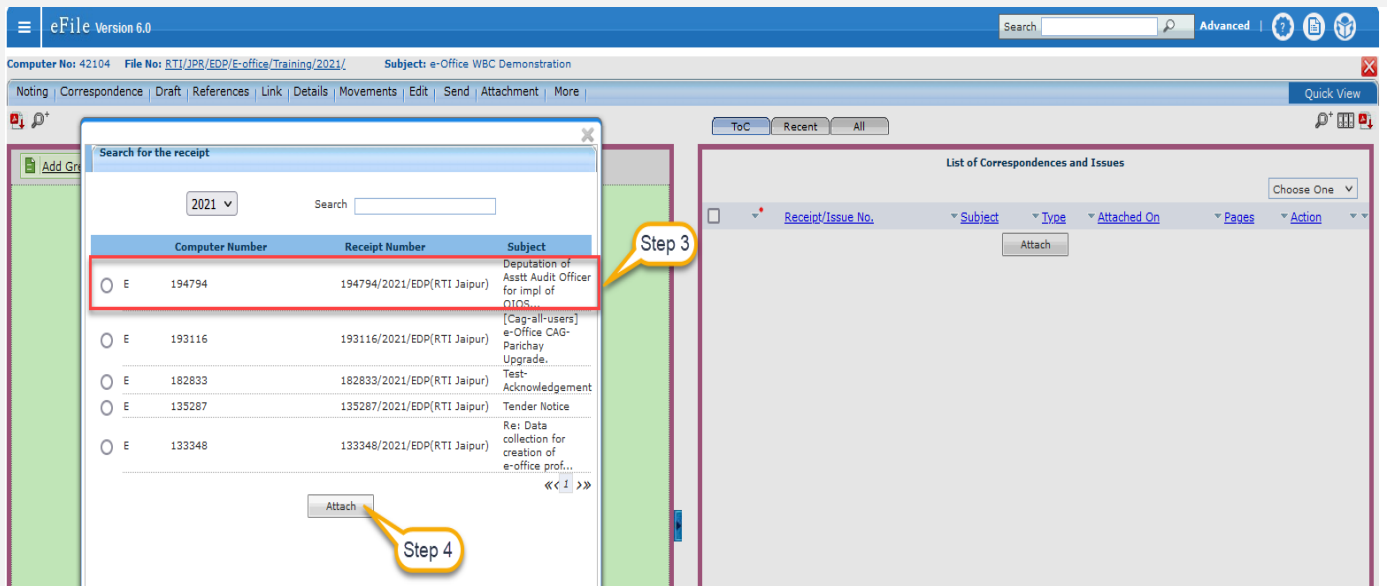
- User can attach eReceipt diarized in eOffice to an eFile opened from Inbox/Created through following process.

STEPS TO FOLLOW:

1. Click ToC menu from the right panel of file inner page.



2. Click Add Receipt action button.
3. Select receipt from year wise sorted list of Electronic Receipt.



4. Click Attach to attach selected receipt in File.

Note:

- Latest correspondences (receipt/issue) will be displayed on top the list
- List of all the attached correspondences (Issues and eReceipt) will be displayed in ToC.

Action on receipts

- Action on receipts like (Detach, Close, Mark (as PUC, FR), Unmark etc.) can be taken from correspondence list view.

The screenshot shows a web application interface titled "List of Correspondences and Issues". At the top right, there is a "Quick View" button. Below it are three tabs: "ToC", "Recent", and "All". The main area contains a table with columns: "Receipt/Issue No.", "Subject", "Type", and "Attached On". A single row is visible with a checked checkbox in the first column, a receipt number "194794/2021/EDP(RTI Jaipur)", a subject "Deputation of Asstt Audit Officer for impl of OIOS...", a type "PUC1", and a date "14/09/21 04:07". A callout bubble labeled "Step 1" points to the checked checkbox. A callout bubble labeled "Step 2" points to a context menu that is open over the row. The menu options are: "Choose One", "Mark As PUC", "UnMark", "Mark As FR", "Detach", "Close", and "Print Barcode".

STEPS TO FOLLOW:

1. Select the receipt using checkbox on which action has to be taken
2. Select the action from the drop down menu as shown

- **Mark as PUC:**

- An unmarked receipt can be marked as PUC by clicking Mark as PUC

Note:

- Not applicable for Issues and closed receipt.

- **Unmark:**

- A marked (FR/PUC) receipt in Correspondence list can be unmarked using Unmark.

Note:

- Not applicable for Issues.

- **Mark as FR:**

- An unmarked receipt can be marked as FR by clicking Mark as FR

Note:

- Not applicable for Issues and closed receipt.

- **Close:**

- It will display 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:**

- It will display detach confirmation pop up 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.
-

8.3 Add Noting

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

Add Yellow Note:

- Yellow Note is to add a draft note in a file for taking approvals from reporting before finalizing the green note.
- Once the yellow note is confirmed, it changes to green note sheet.
- Yellow Note can be used in following two scenarios:

Scenario 1: For PA/PS attached with officers:

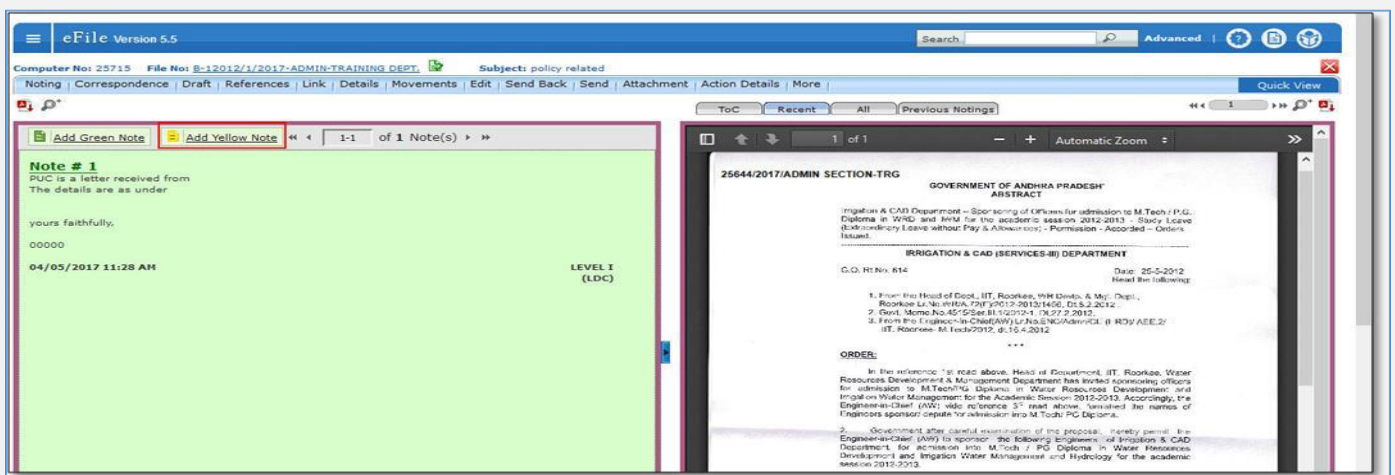
- PA/PS of the officers can write noting on yellow note when officer is giving dictation and submit file back to officer for correction or confirmation.
- Officer can either edit/discard/confirm the yellow note.
- Once it is confirmed then Yellow note changes to Green note sheet and officer can then sign and send the file to the concerned.

Scenario 2: For confirmation:

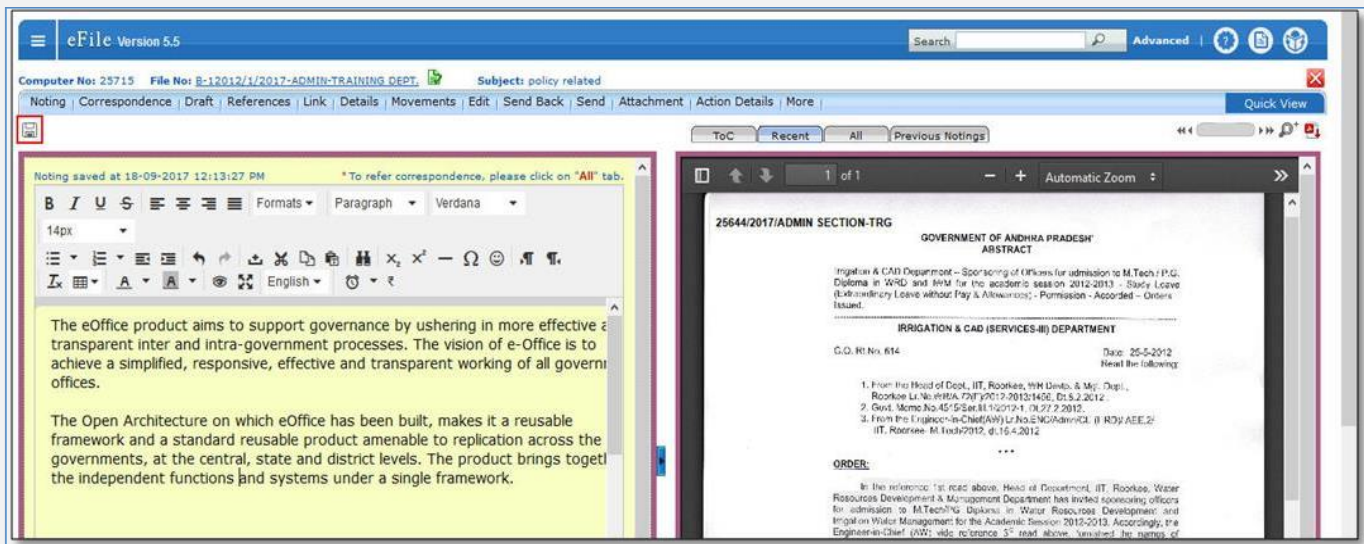
- When user is not sure about the content to be written on green sheet and requires confirmation from reporting officer then user can write content on yellow note and submit to reporting officer for correction.
- Further, reporting officer can edit yellow note for correction and submit back to user who created yellow note.

STEPS TO FOLLOW:

Step 1: Click on Add Yellow Note link.

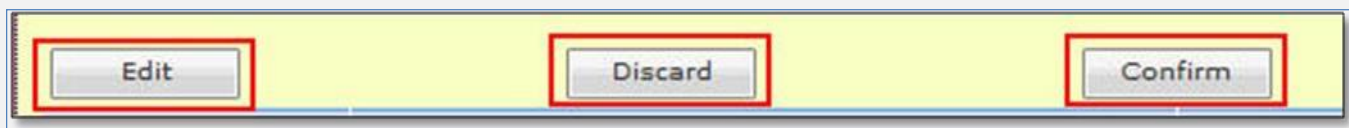


Step 2: Click on SAVE button after adding content; as shown. As a result the yellow note gets saved.



Step 3: After the note is saved, user can perform the action as per the authorization

- Edit: User can edit the yellow note
- Discard: User can discard the yellow note
- Confirm: User can confirm the yellow note into green note.

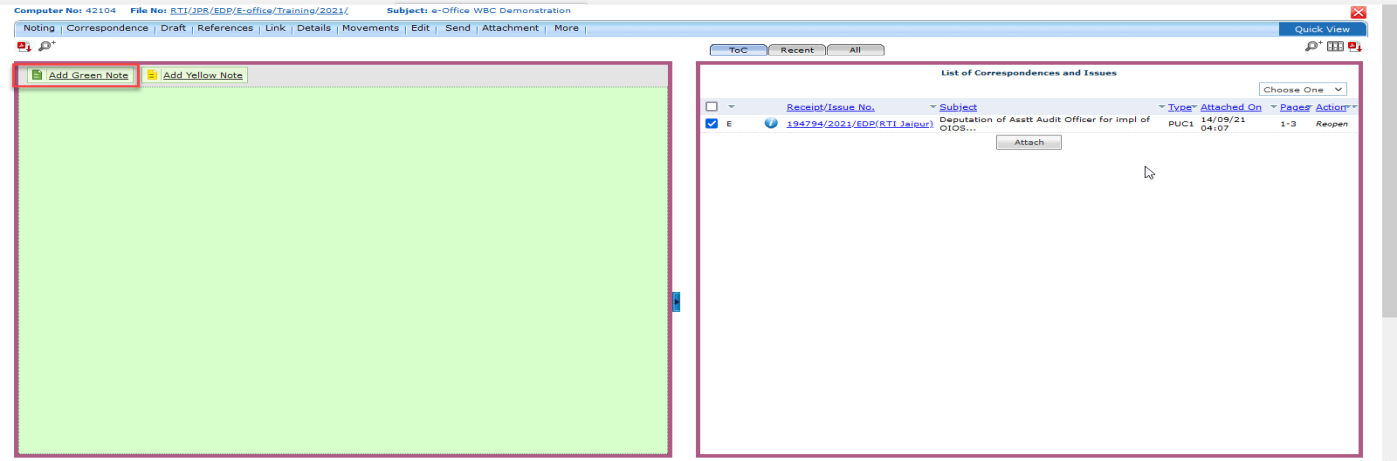


Add Green Note

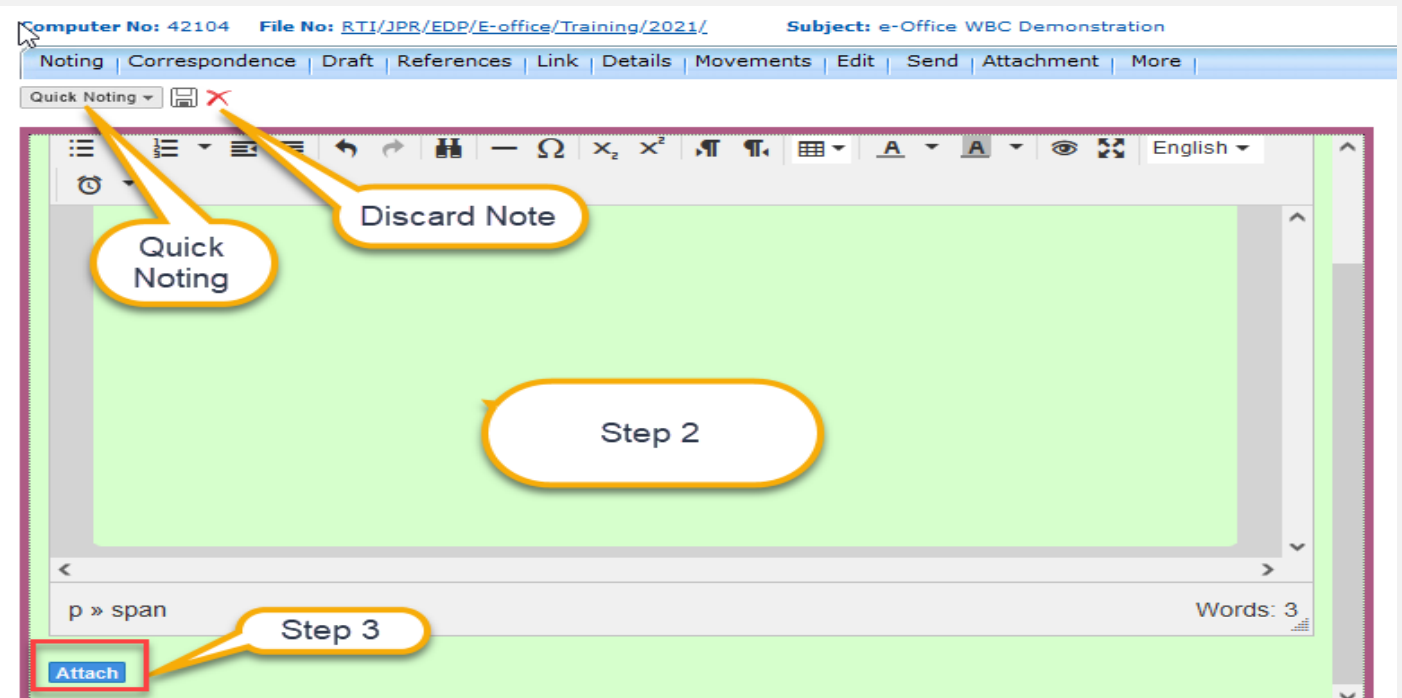
In order to add green note in an electronic file user needs to follow following steps.

STEPS TO FOLLOW:

1. Click Add Green Note Icon in noting panel of electronic file inner page.



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



Note:

- Pasted content having hyperlinked data/URLs should be saved as plain text
- Quick Noting may be used to add predefined noting.

3. Click Attachment icon to attach document (PDF) if require.

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.
 - Legends will be displayed in File Inbox/Inbox Folder/Created/Parked list to indicate file having saved Green note.
-

Discard Saved Green Noting

1. Click Discard icon on Note Action Header.
2. 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.

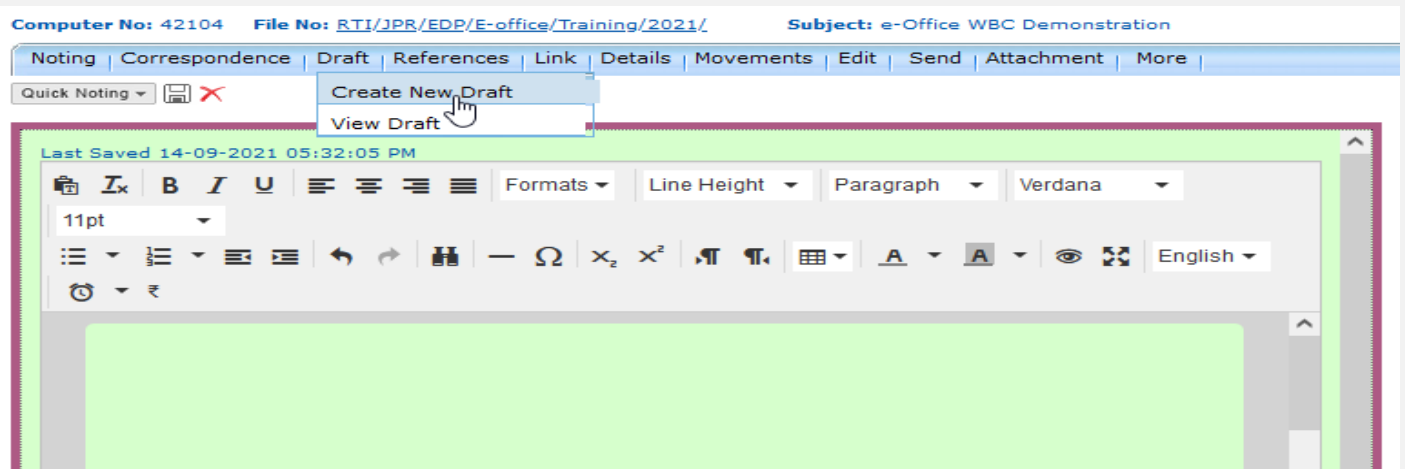
8.4 Create Draft(DFA) in an Electronic File

- Draft for approval (DFA) can be created in a standalone Electronic File (Not Attached with any other File/Receipt) available in Inbox/Inbox folder/Created/Parking list.
- There can be three different nature of Draft that can be created.
 - i. New Fresh Draft
 - ii. Reply Draft
 - iii. Reminder Draft

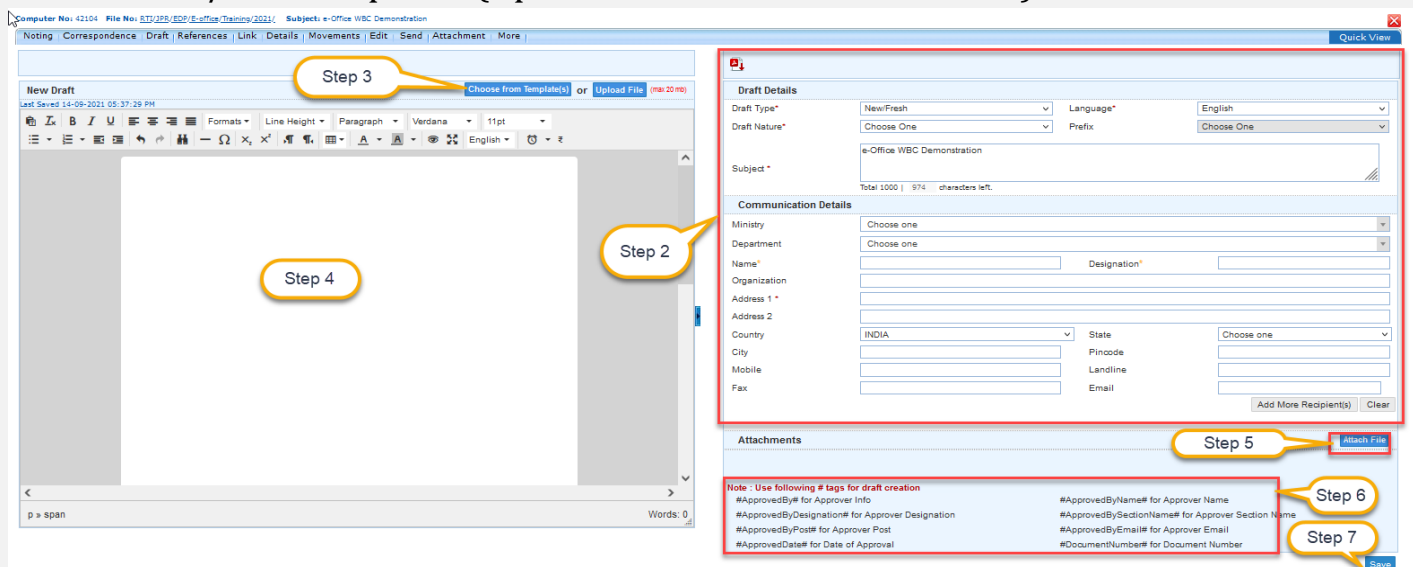
8.4.1 Create a New Fresh Draft

STEPS TO FOLLOW:

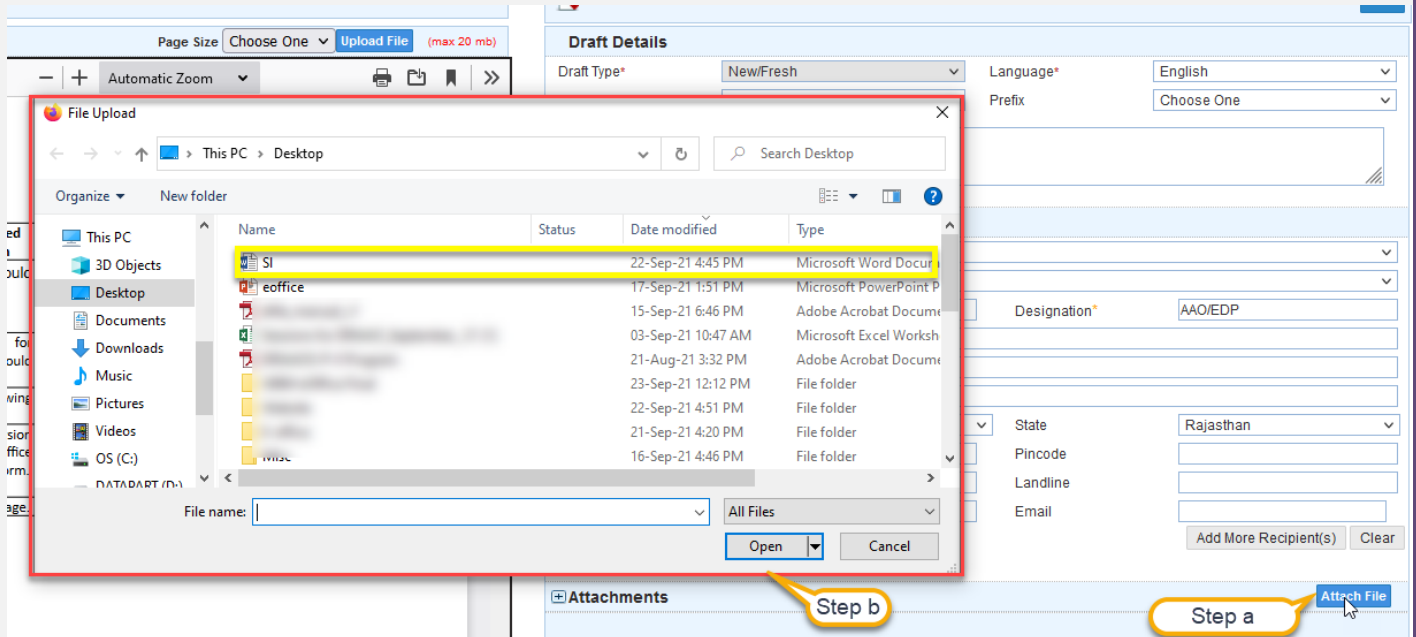
1. Click Create New Draft submenu of Draft menu from file inner page menu bar.



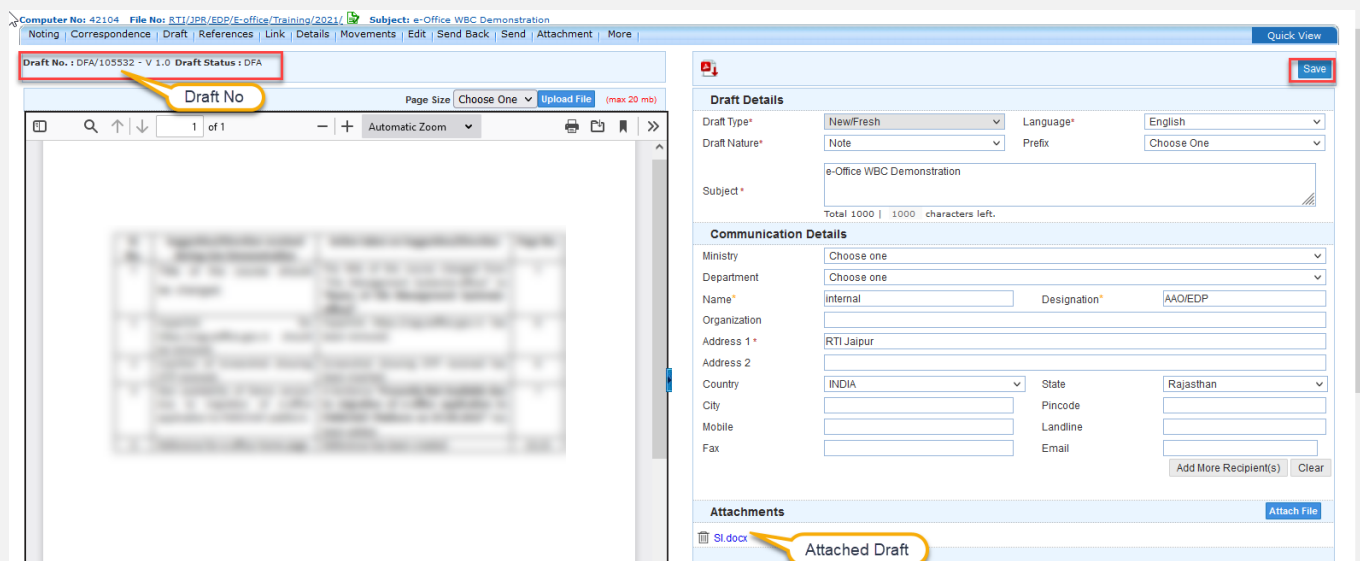
2. Select draft type as New/Fresh & Fill basic metadata categorized under Draft Details. Click Add/Edit Recipients (Optional at time of Draft Creation) action button.



3. Select from pre-defined draft template or Upload a file (PDF or Word Document Only upto 25 MB)
4. Type or paste copied content in the text area to create draft content.
5. Add Attachment if any
 - a. Click on Attach File button.



- b. The File Upload dialog box will appear. Select the desired document and click Open button
 - c. This will attach the document as shown.



6. Add Hash Tag if required (If draft created using Text Editor or Template)
7. Click Save to Save the draft. Unique Draft number will be generated by system automatically for each draft creation.

8.4.2 Create a Reply Draft

Important points:

- ✓ Receipt (of same or external instance) must be attached as a correspondence in file.
- ✓ Attached receipt in correspondence should not be in closed state.

STEPS TO FOLLOW:


1. Click Create New Draft submenu of Draft menu from file inner page menu bar.
2. Select Draft Nature as Reply (Available only when file has active receipts in correspondence)

The screenshot shows the 'New Draft' form with the following steps highlighted:

- Step 1:** The 'Draft Type' dropdown menu is set to 'Reply'.
- Step 2:** The 'Draft Nature' dropdown menu is set to 'New/Fresh'.
- Step 3:** The 'Receipt Number' dropdown menu is set to '194784/2021/EDP(RTI Jaipur)'.
- Step 4:** The 'Communication Details' section is filled out with 'RTI Mumbai' as the organization and 'SAO(CF & Admin.)' as the designation.
- Step 5:** The 'Add More Recipients' button is highlighted.
- Step 6:** The 'Choose from templates' or 'Upload File' button is highlighted.
- Step 7:** The main text area is highlighted.
- Step 8:** The 'Attach File' button is highlighted.
- Step 9:** The 'Save' button is highlighted.
- Step 10:** The 'Save' button is highlighted.

3. Select Receipt No. if there are multiple receipts in ToC.
4. Fill basic metadata categorized under Draft Details.
5. Click Add/Edit Recipients (Optional at time of Draft Creation) action button
6. Select from pre-defined draft template or Upload a file (PDF or Word Document Only upto 25 MB).
7. Type or paste copied content in the text area to create draft content.
8. Add Attachment if any.
9. Add Hash Tag if required (If draft created using Text Editor or Template)
10. Click Save to Save the draft and generate unique draft number.

Note:

- If only one receipt is available in ToC, it will be selected by default.
- Recipient details, Main Category, Sub Category and Subject of selected receipt are auto fetched in respective metadata fields.
- Clicking  icon will display details of Receipt.

8.4.3 Create a Reminder Draft

Important Points:

- ✓ In order to create a Reminder draft, Issue must be present in correspondence of file.

STEPS TO FOLLOW:

1. Click Create New Draft submenu of Draft menu from file inner page menu bar.
2. Select Draft Nature as Reminder.

Computer No: 30281 | File No: RTI/2021/F-2/4-6/Website/3 | Subject: Development & Hosting of RTI Website

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

Computer No: 30281 | File No: RTI/2021/F-2/4-6/Website/3 | Subject: Development & Hosting of RTI Website

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

New Draft
Last Saved: 14-09-2021, 06:23:29 PM

Step 5: Choose from Template(s) or Upload File (Max 20 MB)

Step 6: [Text Area]

Step 4: [Text Area]

Step 3: Issue Number dropdown

Draft Details

Draft Type*: Reminder | Language*: English
Draft Nature*: Choose One | Prefix: Choose One

Subject*: Development & Hosting of RTI Website
Total 1000 | 1000 characters left.

Issue Number: Choose One | View Reminders

Communication Details

Ministry: Choose one | 1/55684/2021
Department: Choose one | 1/62763/2021
Name*: 1/44876/2021 | Designation*
Organization:
Address 1*:
Address 2:
Country: INDIA | State: Choose one
City: | Pincode: Choose one
Mobile: | Landline:
Fax: | Email:

Add More Recipient(s) | Clear

Attachments

Step 7: Attach File

Note: Use following # tags for draft creation

#ApprovedBy# for Approver Info | #ApprovedByName# for Approver Name
#ApprovedByDesignation# for Approver Designation | #ApprovedBySectionName# for Approver Section Name
#ApprovedByPost# for Approver Post | #ApprovedByEmail# for Approver Email
#ApprovedDate# for Date of Approval | #DocumentNumber# for Document Number

Step 8: [Note Section]

Step 9: Save

3. Select Issue No. if there are multiple Issues in ToC. (Reminder popup will open displaying list of all dispatches done on selected Issue)
4. Fill basic metadata categorized under Draft Details.
5. Select from pre-defined draft template or Upload a file (PDF or Word Document Only upto 25 MB)
6. Type or paste copied content in the text area to create draft content.
7. Add Attachment if any.
8. Add Hash Tag if required (If draft created using Text Editor or Template)
9. Click Save to Save the draft and generate unique draft number.

Note:

- Recipient details, Main Category, Sub Category and Subject of selected receipt are auto fetched in respective metadata fields.

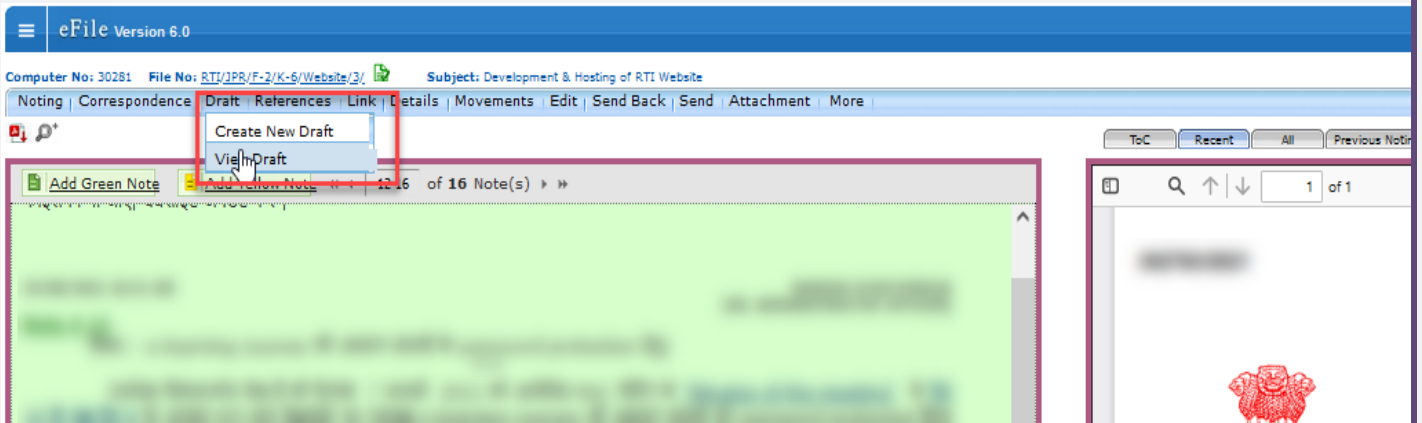
8.4.4 View Draft List

Important Points:

1. Electronic File containing the drafts must be in Created/Inbox/Parked/Closed list.
2. Electronic File must have drafts in DFA/Approved/Sign Pending/Signed State.

STEPS TO FOLLOW:

1. Click View Draft submenu of Draft menu from file inner page menu bar.



2. This will show List of all created Drafts.

A screenshot showing two tables. The first table is titled 'Draft List' and has columns: Draft No., Subject, Status, Approved By, Version, and Delete. It contains one row with Draft No. 'DFA/103885', Status 'DFA', and a 'Delete' link. The second table is titled 'Draft Version List' and has columns: Version, Created On, Created By, and Status. It contains one row with Version '1.0' and Status 'DFA'.

Draft List						Delete
<input type="checkbox"/>	Draft No.	Subject	Status	Approved By	Version	Delete
<input type="checkbox"/>	DFA/103885		DFA		Version	Delete

Draft Version List			
Version	Created On	Created By	Status
1.0			DFA

Note:

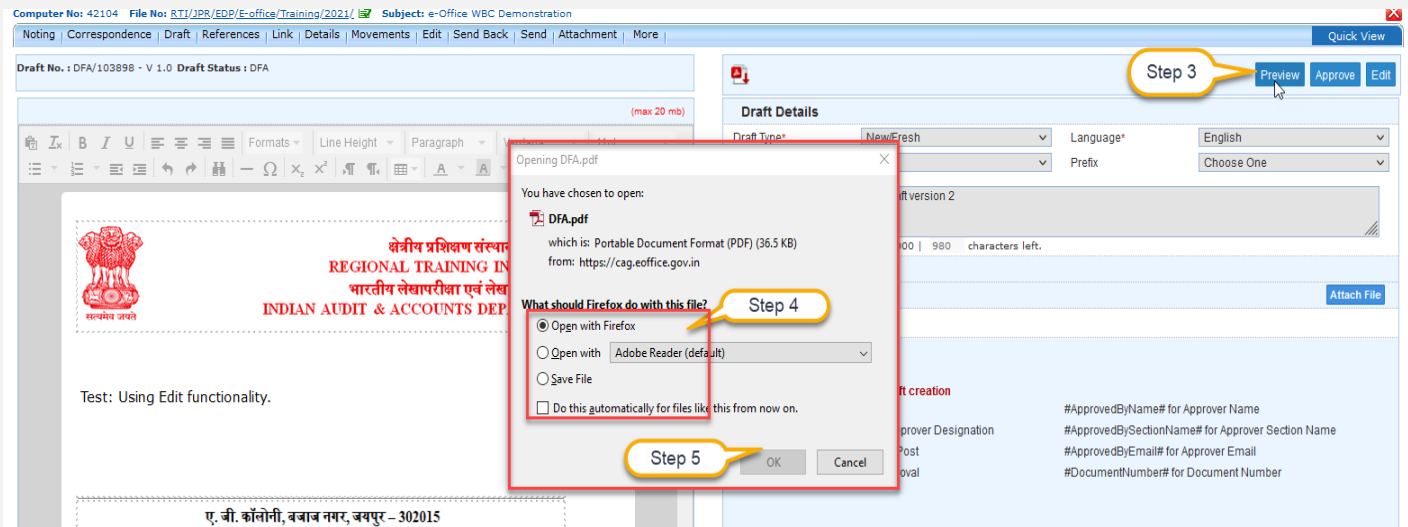
- User will be able to View Draft details (Draft No., Subject, Last Updated On and Approved By) and version details (Version, Created On, Created By, Status).
- User will be able to click open a draft, to view the Draft.
- User will be able to take following action - Show Version and Delete.

8.4.5 Preview Draft (DFA)

- This feature edit draft (DFA) content, details and Add/Edit Recipient details.
- This feature is useful to check actual formatting of created draft.

STEPS TO FOLLOW:

1. Click View Draft submenu of Draft menu from file inner page menu bar.
2. Open unapproved draft from Draft List by clicking on Draft No.
3. Click on preview button.



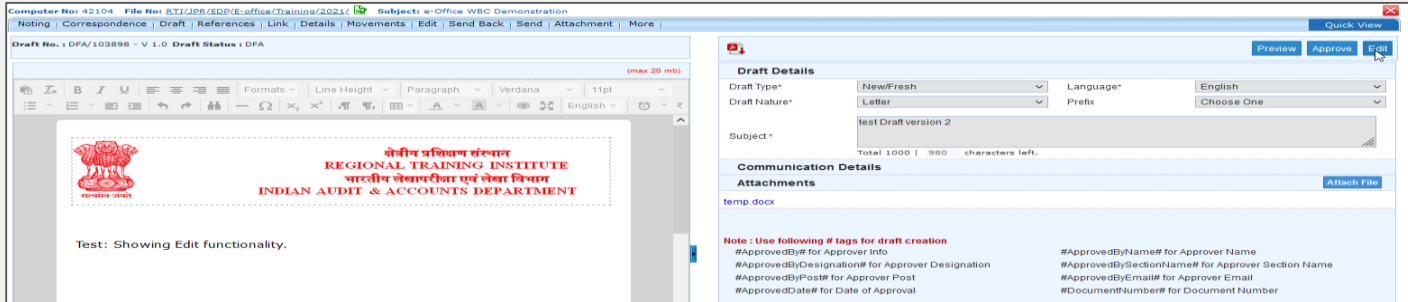
4. A dialog box asking to open the previewed draft will be visible. Select any option.
5. Enter Ok
6. This will preview the draft content

8.4.6 Edit Draft (DFA)

- This feature edit draft (DFA) content, details and Add/Edit Recipient details.

STEPS TO FOLLOW:

- Click View Draft submenu of Draft menu from file inner page menu bar.

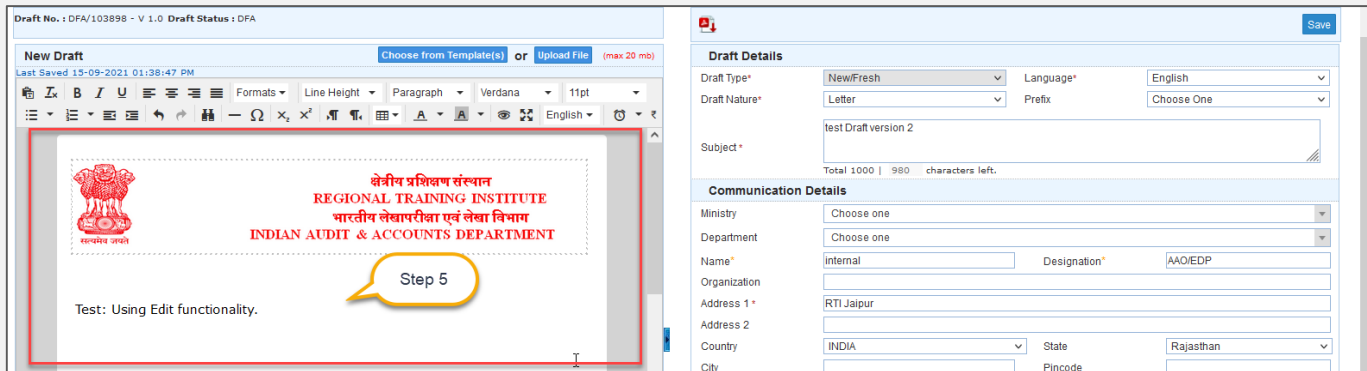


- Open unapproved draft from Draft List by clicking on Draft No.

- Click Edit Button.

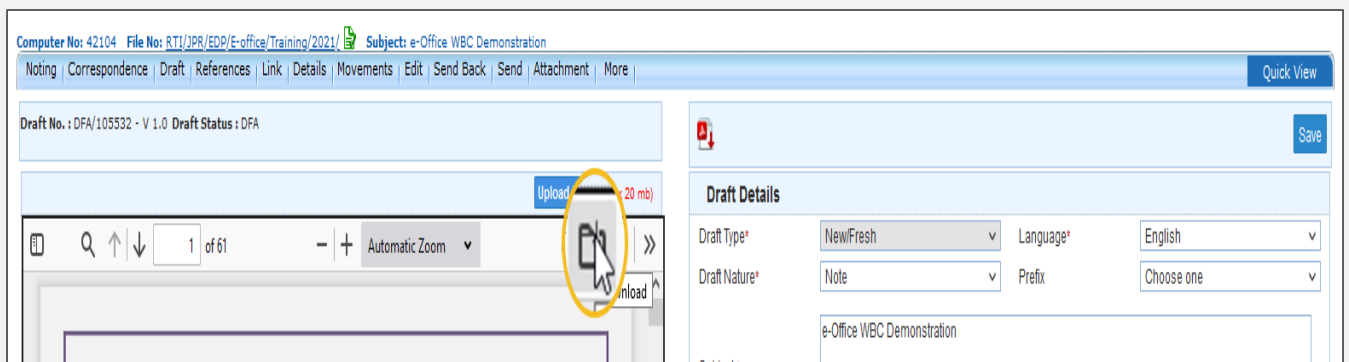
Scenario 1: In Case of DFA created using DFA Editor or Template

- Saved content of the draft will be displayed in editable form
- Edit content (option to type content, paste copied content and choose template will be available) as required.



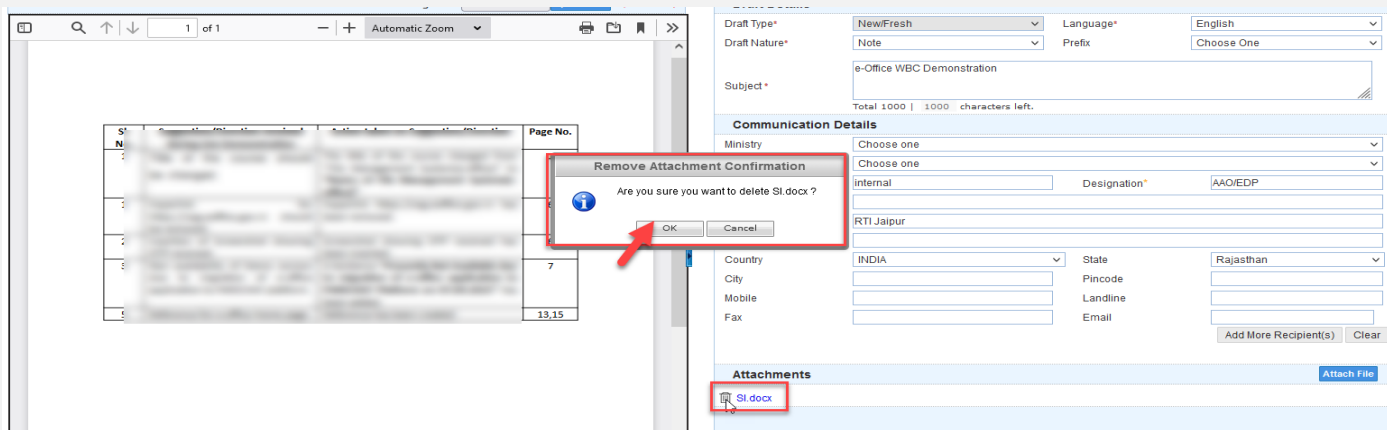
Scenario 2: In Case of DFA created using uploading Word/PDF Document

- Download uploaded document by clicking on Download Icon for further editing. A



pdf file of draft DFA will be downloaded.

5. Make required changes in the downloaded file by converting it from pdf to word. Click Upload File button to select and upload updated/edited word/pdf document or a new document from local drive.
6. Edit metadata (If required)
7. Add or remove attachment (If required)
 - An attachment may be added if required as shown in [Creating Draft Section](#).
 - An attachment may be removed if not required by clicking the delete icon in front



of an attachment.

- A confirmation dialog box will pop up. Click Ok to remove the attachment.
8. Click save. This will save the updated content of 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 may 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.

8.4.7 Show Version

- This section describes how to see previous version created by various users during the file submission

STEPS TO FOLLOW

- Clicking on Show Version Icon should display all version of respective draft.

Draft List

<input type="checkbox"/>	Draft No.	Subject	Status	Approved By		Delete
<input type="checkbox"/>	DFA/103898	test Draft version 2	DFA		Version	Delete

Draft Version List

Version	Created On	Created By	Status
1.0	15/09/21 11:18	VINOD SENCHA,AAO(EDP)VS	DFA

- Clicking on version number in draft version list will display that version.

Computer No: 42104 File No: RTI/JPB/EDP/E-office/Training/2021/ Subject: e-Office WBC Demonstration

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

Draft No. : DFA/103898 - V. 1.0 Draft Status : DFA

Draft Details

Draft Type* New/Fresh Language* English

Draft Nature* Letter Prefix Choose One

Subject* test Draft version 2
Total 1000 | 980 characters left.

Communication Details

Attachments Attach File

temp.docx

Note : Use following # tags for draft creation

#ApprovedBy# for Approver Info	#ApprovedByName# for Approver Name
#ApprovedByDesignation# for Approver Designation	#ApprovedBySectionName# for Approver Section Name
#ApprovedByPost# for Approver Post	#ApprovedByEmail# for Approver Email
#ApprovedDate# for Date of Approval	#DocumentNumber# for Document Number

ए. जी. कॉलोनी, बजाज नगर, जयपुर - 302015
A.G. Colony, Bajaj Nagar, Jaipur - 302015
दूरभाष / Tel.: 0141-2704709, फैक्स / Fax: 0141-2702927
ई-मेल / E-mail: rtijaipur@cag.gov.in, वेबसाइट / Website : www.rtijaipur.cag.gov.in

8.4.8 Delete Draft

- Only Draft in DFA State can be deleted.

STEPS TO FOLLOW

1. Click View Draft submenu of Draft menu from file inner page menu bar.

Draft List						Delete
<input type="checkbox"/>	Draft No.	Subject	Status	Approved By.		
<input type="checkbox"/>	DFA/103898	test Draft version 2	DFA		Version	Delete

Draft Version List			
Version	Created On	Created By	Status
1.0	15/09/21 11:18	VINOD SENCHA,AAO(EDP)VS	DFA

2. Click the delete button respective to the draft to be deleted.

There will be following different scenario

- a. **File without further movement:** Clicking Delete Icon in draft list should remove the Draft and its version.
- b. **File with further movement (Single Version):** Clicking Delete Icon in draft list will change the Draft and its Version Status to 'DELETED' and Draft No. and Version Link become Inactive
- c. **File with further movement (Multiple Version):** Clicking Delete Icon in draft list will change the Draft and all of its Version Status to 'DELETED' and Draft No. and Version Link become Inactive.

9 Send Files

- This feature allows user to forward Files to other users from Inbox/Created List.

STEPS TO FOLLOW:

1. Open a file from Inbox or Created list.

Computer No: 42104 File No: RTI/JPR/EDP/E-office/Training/2021/ Subject: e-Office WBC Demonstration

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

Organization: COMPTROLLER AND AUDITOR GENERAL OF INDIA (CAG)

All Reporting Officer Sub-ordinates In Channel Preferred List

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

To: [Empty] Notify: Email SMS

Total 1000 | 1000 characters left.

Remarks: [Text Area]

Set Due Date: [Calendar Icon]

Action: Forward

Priority: Choose one

eSign and Send Send

File Number	Subject	Note(Chars)
<input checked="" type="checkbox"/> RTI/JPR/EDP/E-office/Training/...	e-Office WBC Demonst..	1000

Note: Bulk signing maximum allowed characters- 1000000 Total(Formatting included) :1000

2. Click Send menu

3. Select user in To field from the Organization hierarchy list in case for single instance multiple departments.
4. Select Due Date(If Required)
5. Select Action(If Required)
6. Select Priority(If Required)
7. Enter Remarks
8. Select Notify Through (SMS/Mail) using checkbox to notify receiver. (If required)).
9. Click Send to forward file.

Note:

- Sender Name and Post details shall be appended in Green Note of File automatically after movement.
- Entry of File Sending shall be updated in File Sent list of User and Movement details of File.

9.1 Send file with eSign

- This feature allows user to digitally sign green note using eSign (Aadhaar based OTP).

Important Points:

- ✓ File should be available in file inbox/created list.
- ✓ User should have Aadhaar linked mobile number (For OTP based eSign) listed in the EMD.
- ✓ License Agreement (Consent of Authentication) should be made between the Department and eSign Service provider to avail the eSign service.

STEPS TO FOLLOW:

1. Follow Steps 1 to 8 as in sending a file
9. Click eSign and Send.
10. Read and agree to the '**Consent for Authentication form**' to proceed and then you will be redirected to the eSign service portal.
11. Enter your Aadhaar Number/Virtual ID and Click 'Get OTP.
12. Enter the OTP received on the registered (with AADHAR) mobile number.
13. Click Submit to eSign and Send.

9.2 File Sent List

- The Sent box displays the list of Files (Electronic and Physical) sent/forwarded by the user to other users in the system.
- It keeps a record of all the files 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.
- To view list of Files sent, Click 'Sent' sub module under File module.

Date Range : 26/03/2021 To 15/09/2021

Computer No.	File Number	Subject	Sent To	Sent On	Currently With	Due On	Action
E 42104							Initiate Action
E 30281							Initiate Action
E 30244							Initiate Action
E 38345							Initiate Action
E 28887							Initiate Action
E 30244							Initiate Action
E 40487							Initiate Action
E 36903							Initiate Action
E 30137							Initiate Action
E 30137							Initiate Action
E 30240							Initiate Action
E 40487							Initiate Action
E 36903							Initiate Action

LEGEND > Priority ■ Out Today ■ Most Immediate ■ Immediate 🟢 Action Initiated 🏠 Other Department 📁 Files with Draft 📄 Draft Note 🟡 Yellow Note 🔵 External Files

Description:

- The Sent list of File displays information such as, Nature of File (E/P), Computer No., File Number, Subject, Sent To, Sent On, Currently With, Due On and Actions.
- The list of File can be sorted based on Computer No., Sent On and Created On by clicking on column heads.

9.3 File Pull Back

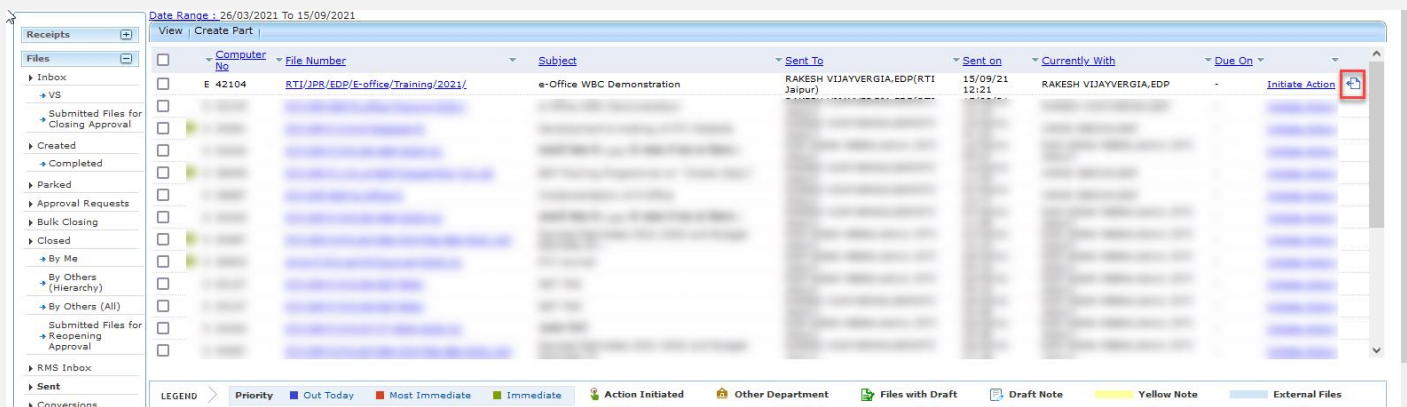
- This feature allows user to Pull Back forwarded file from the user to whom it was marked.
- This may be required in case where user forwards the file to an unintended person mistakenly, or the person is un-available so the subject matter (file) may be pulled back and re-assigned to someone else.

Important Points:

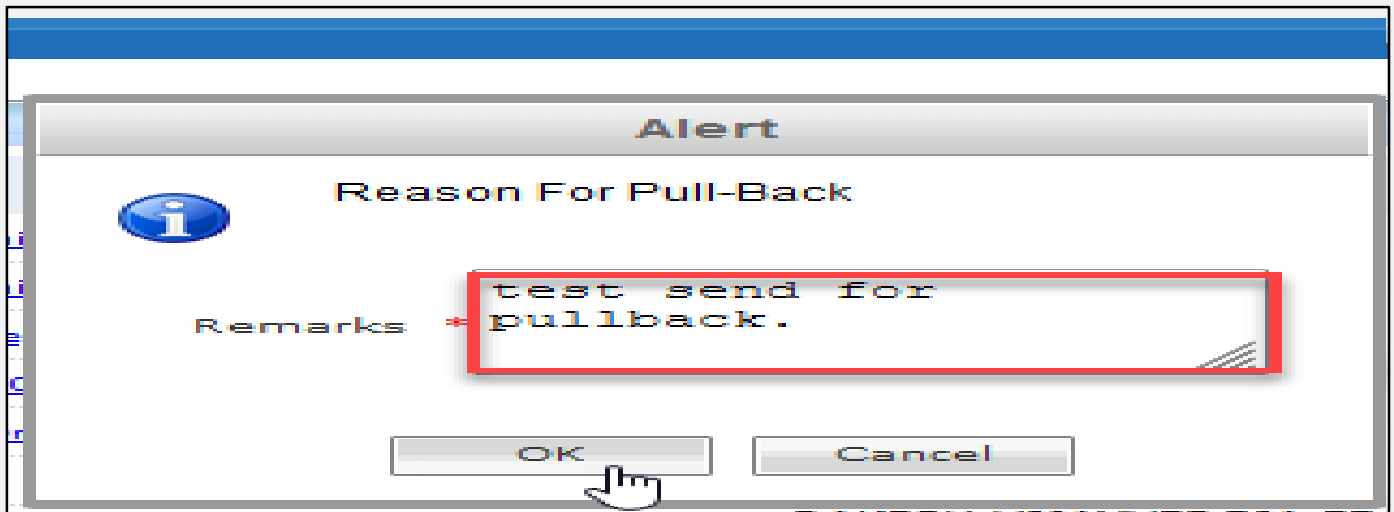
- ✓ This can only be done until the recipient has not opened the file.
- ✓ Pull Back link/icon will be available for only those file which are eligible for Pull Back.

STEPS TO FOLLOW:

1. Click Pull Back icon with respect to file to be pulled from sent list of files module.



2. Enter Pull Back remarks.



3. Click OK in the Pull Back Confirmation pop up to pull back the selected File.

10. Approve Draft (DFA)

- This section describes steps to approve a draft.
- If the Draft Approving Authority wants to change the content of the draft. Please refer the instructions in [Edit Draft Section](#).

Important Points:

- ✓ This option is available to the official only having the draft approving authority.
- ✓ Draft content is not available for editing, once draft is approved.
- ✓ Removal or Adding of attachment is not possible after approval.
- ✓ Only Recipient details can be edited after approval.

STEPS TO FOLLOW:

1. Open a draft (DFA) by clicking draft no link to be approved from Files → view draft → 'List of Drafts'.
2. Click Approve.

Draft No. : DFA/103898 - V 1.0 Draft Status : DFA

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Test: Using Edit functionality.

Approval Confirmation

Once draft gets approved no further changes can be made.
#DocumentNumber# tag used for displaying the document number is not available in the draft content. Would you like to proceed further.

#ApprovedByName# for Approver Name
#ApprovedBySectionName# for Approver Section Name
#ApprovedByEmail# for Approver Email
#DocumentNumber# for Document Number

3. An approval confirmation pop will appear as shown above.
4. Click 'Ok' on approval confirmation pop-up.
5. This will approve the draft.

11. Signing Approved Draft

- This section describes the digital signing process of an approved draft.

11.1 eSign

This feature allows user to digitally sign Draft using eSign.

Important Points:

- ✓ User should have Aadhaar linked mobile number (For OTP based eSign) listed in the Employee Master Data.

STEPS TO FOLLOW:

1. Open an Approved draft from the 'List of Drafts'.

Quick View

Draft Details

Draft Type*	New/Fresh	Language*	English
Draft Nature*	Letter	Prefix	Choose One
Subject *	test Draft version 2 Total 1000 980 characters left.		

Communication Details

Ministry	Choose one		
Department	Choose one		
Name*	internal	Designation*	AAO/EDP
Organization			
Address 1 *	RTI Jaipur		
Address 2			
Country	INDIA	State	Rajasthan
Mobile		Landline	
Fax		Email	

Add More Recipient(s) Clear

Attachments Attach File

temp.docx

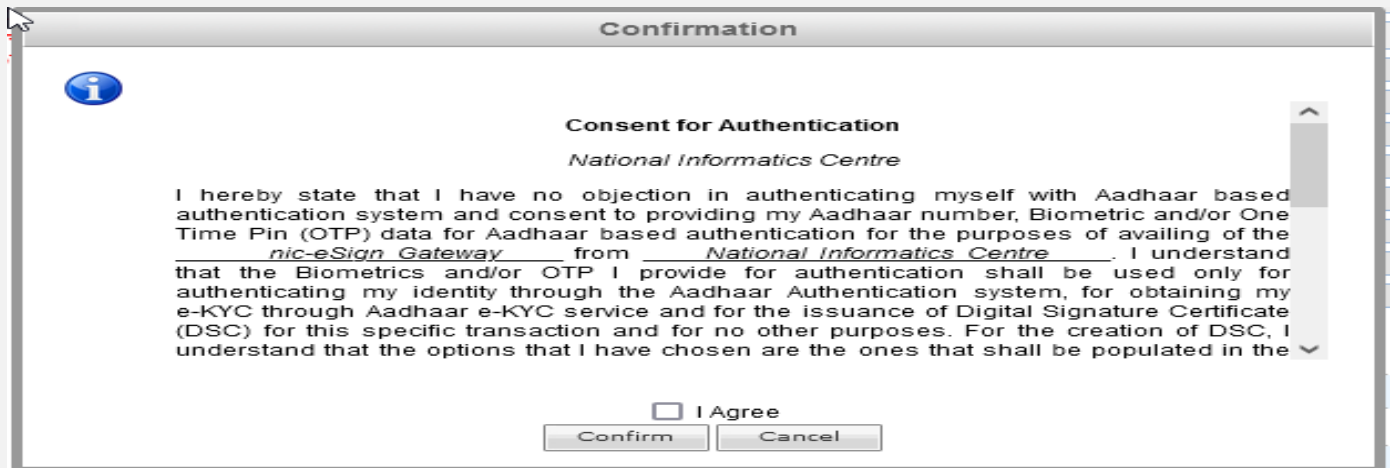
Note : Use following # tags for draft creation

#ApprovedBy# for Approver Info	#ApprovedByName# for Approver Name
#ApprovedByDesignation# for Approver Designation	#ApprovedBySectionName# for Approver Section Name
#ApprovedByPost# for Approver Post	#ApprovedByEmail# for Approver Email
#ApprovedDate# for Date of Approval	#DocumentNumber# for Document Number

Notify Through SMS

eSign Dispatch By Self Dispatch By CRU Edit Custom Sign

2. Click 'eSign' button.
3. To proceed, read and agree to the 'Consent for Authentication form'.



Confirmation

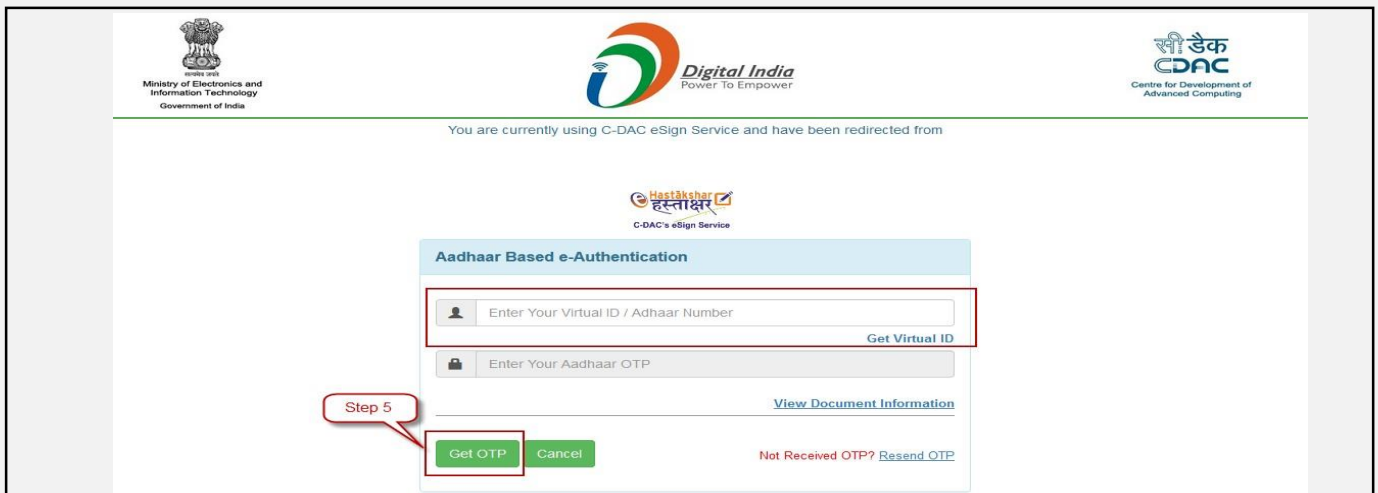
Consent for Authentication
National Informatics Centre

I hereby state that I have no objection in authenticating myself with Aadhaar based authentication system and consent to providing my Aadhaar number, Biometric and/or One Time Pin (OTP) data for Aadhaar based authentication for the purposes of availing of the nic-eSign Gateway from National Informatics Centre. I understand that the Biometrics and/or OTP I provide for authentication shall be used only for authenticating my identity through the Aadhaar Authentication system, for obtaining my e-KYC through Aadhaar e-KYC service and for the issuance of Digital Signature Certificate (DSC) for this specific transaction and for no other purposes. For the creation of DSC, I understand that the options that I have chosen are the ones that shall be populated in the

I Agree

Confirm Cancel

4. It will redirect to the eSign service portal.



Ministry of Electronics and Information Technology
Government of India

Digital India
Power To Empower

सी डेक
CDAC
Centre for Development of Advanced Computing

You are currently using C-DAC eSign Service and have been redirected from

Hastakshar
हस्ताक्षर
C-DAC's eSign Service

Aadhaar Based e-Authentication

Enter Your Virtual ID / Adhaar Number [Get Virtual ID](#)

Enter Your Aadhaar OTP [View Document Information](#)

Step 5 [Get OTP](#) Cancel [Not Received OTP? Resend OTP](#)

5. Enter your Aadhaar Number/Virtual ID and Click 'Get OTP'.
6. Enter the OTP received on the registered mobile number.
7. Click 'Submit' to eSign the approved draft.

Note:

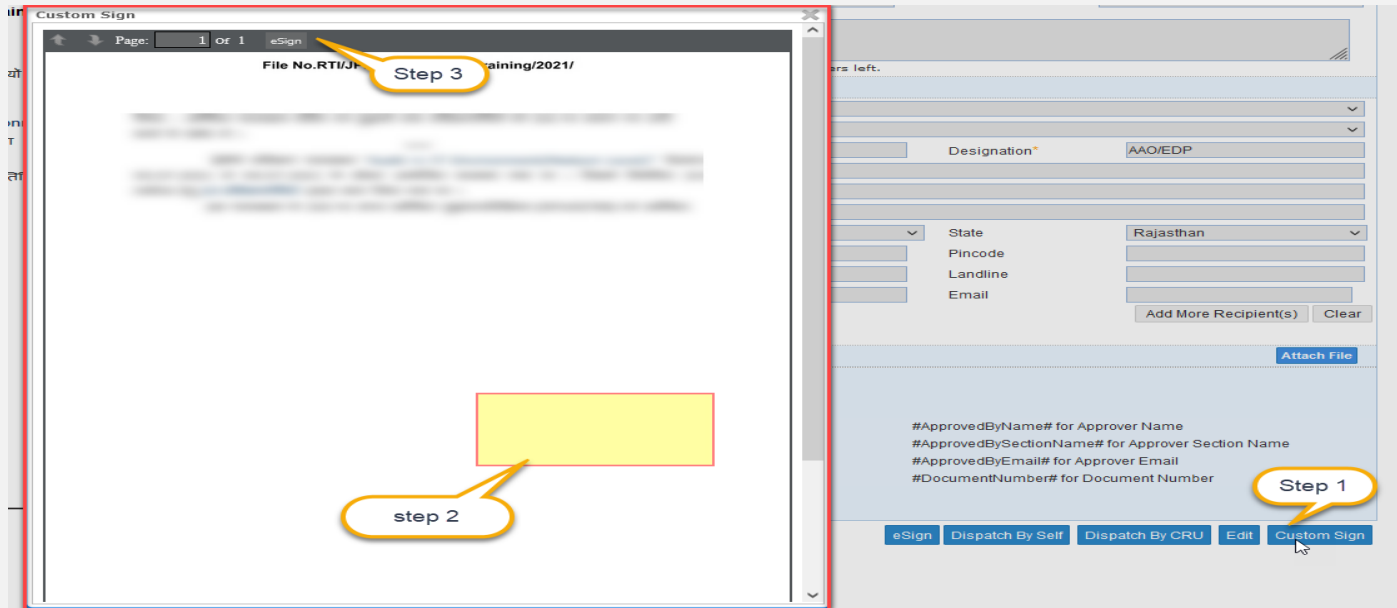
- Draft status will change to Signed.
- User shall be able to view Digital Signature(s) on signature panel of signed draft.
- Option of Edit (Recipient Detail) and Dispatch will be available.
- Signing details (user's name, date and time stamp of signing) should be embossed on the Approved DFA content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

11.2 Custom Sign

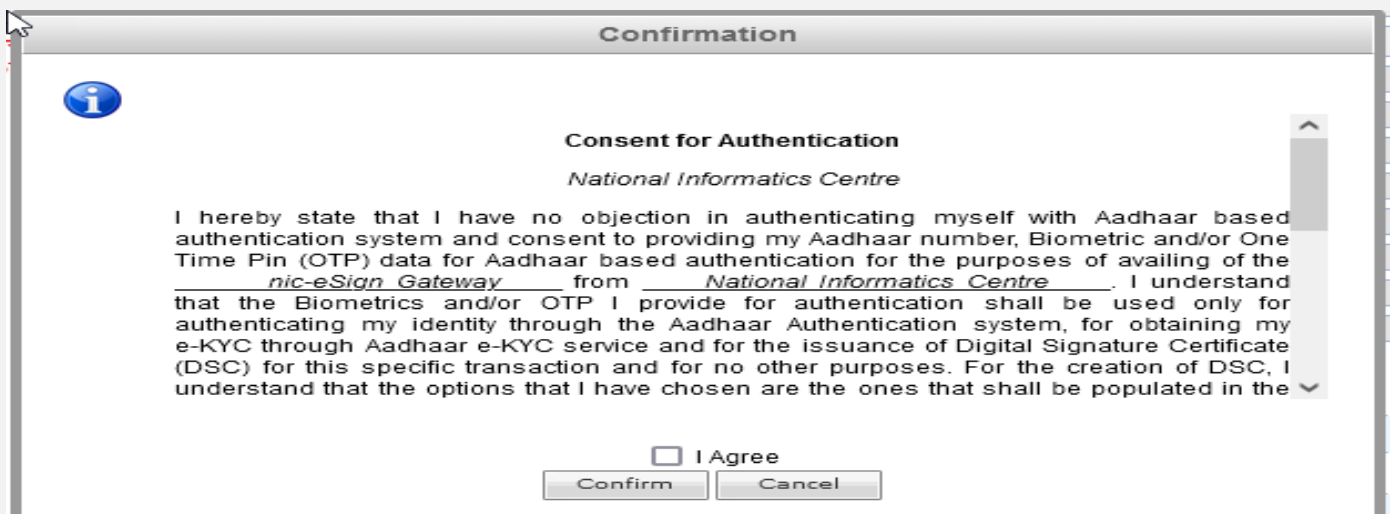
- This feature allows **user** to digitally sign by selecting custom location on an approved Draft.

STEPS TO FOLLOW:

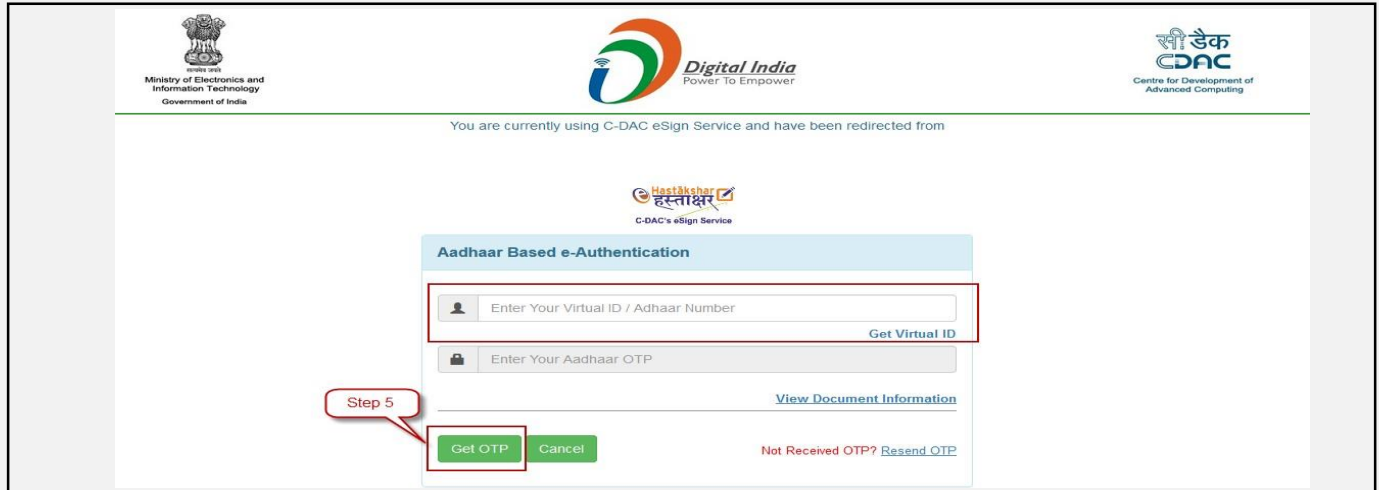
- Open an Approved draft from the 'List of Drafts than Click on 'Custom Sign' button.



- A dialog box showing approved letter will pop up. Select the area of signature by using the dragging of mouse as shown.
- After selecting area click on esign.
- To proceed, read and agree to the 'Consent for Authentication form'.



5. It will redirect to the eSign service portal.

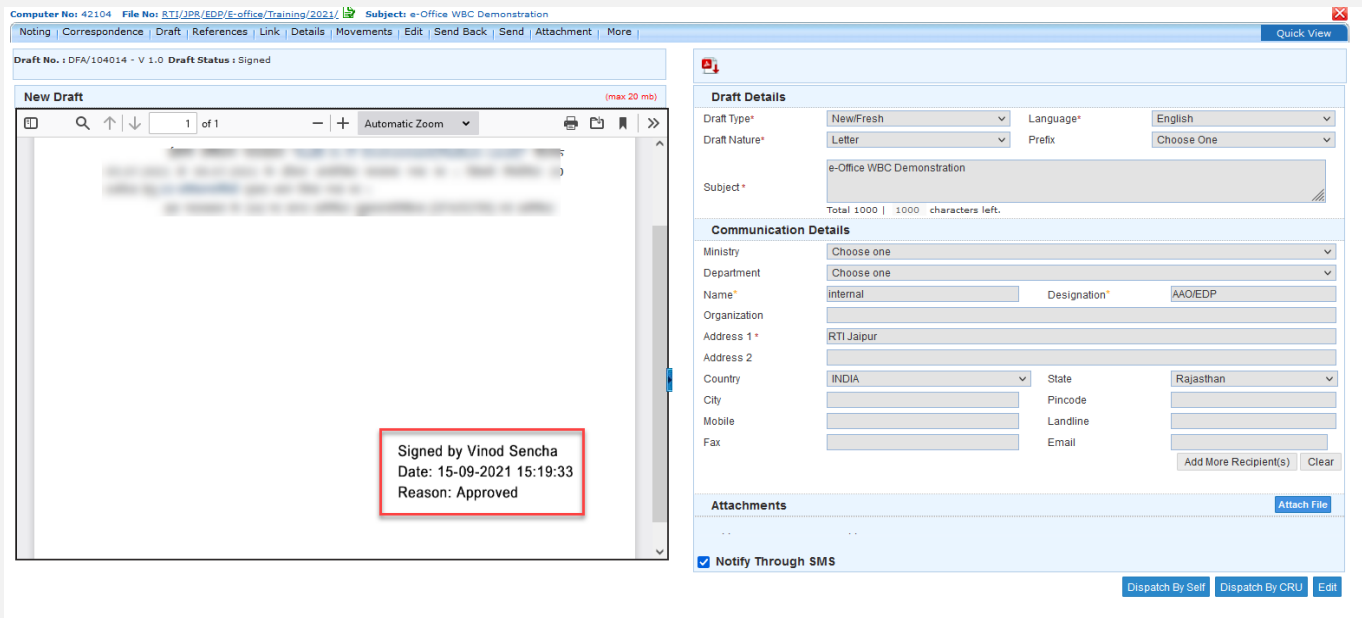


6. Enter your Aadhaar Number/Virtual ID and Click 'Get OTP'.

7. Enter the OTP received on the registered mobile number.

8. Click 'Submit' to eSign the approved draft.

9. The esign will be made at the selected location in step 2.



12. Dispatch from File

- This feature allows User to Dispatch Signed Draft (Issue) letters through Self or CRU (Central Registering Unit).

12.1 Dispatch by Self

STEPS TO FOLLOW:

1. Open the signed/approved draft to be dispatched from 'View Drafts' Menu.
2. Click on dispatch by self.

The screenshot displays the 'New Draft' window on the left and the 'Draft Details' form on the right. The 'New Draft' window shows a signed draft with the text 'Signed by Vinod Sencha' and a callout 'Step 3'. The 'Draft Details' form is divided into several sections: 'Draft Details' (Draft Type, Draft Nature, Subject, Language, Prefix), 'Communication Details' (Ministry, Department, Name, Designation, Organization, Address, Country, State, City, Pincode, Mobile, Landline, Fax), 'Attachments' (Attach File), 'Dispatch Options' (Email Details, Postal & Out Register Details), and a 'Note' section at the bottom. Callouts 'Step 4', 'Step 5a', and 'Step 5b' highlight specific areas of the form. The 'Note' section contains the following text: 'Note : Use following # tags for draft creation #ApprovedBy# for Approver Info #ApprovedByDesignation# for Approver Designation #ApprovedByPost# for Approver Post #ApprovedDate# for Date of Approval #ApprovedByName# for Approver Name #ApprovedBySectionName# for Approver Section Name #ApprovedByEmail# for Approver Email #DocumentNumber# for Document Number'. At the bottom right, there are two buttons: 'Send With Followup' and 'Send Without Followup'.

3. Intended recipients are listed under 'Communication Details'.
4. Click 'Add Recipients' to add more, if required.
5. Enter Dispatch Option
 - 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.

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.

6. There will be two dispatch option–

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 '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.

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

12.2 Dispatch by CRU

STEPS TO FOLLOW:

1. Open the signed/approved draft to be dispatched from 'View Drafts' Menu.

The screenshot displays the e-Office WBC Demonstration interface. The main window shows a draft document titled "File No.RTI/JPR/EDP/E-office/Training/2021/". The document content includes the logo of the Regional Training Institute, Indian Audit & Accounts Department, and contact information for the Jaipur office. The interface is divided into several sections:

- Draft Details:** Shows communication details such as Ministry, Department, Name (internal), Designation (AAO/EDP), Organization, Address 1 (RTI Jaipur), Address 2, Country (INDIA), State (Rajasthan), City, Pincode, Mobile, Landline, Fax, and Email.
- Attachments:** Shows an attached file named "temp.docx".
- Dispatch Options:** Shows the "Dispatch By CRU Details" section with a dropdown for "CRU User(s)" (Choose One) and a dropdown for "Delivery Mode" (By Hand). There is also a "Remarks" text area.
- Note:** A note at the bottom provides instructions on how to use tags for draft creation, such as #ApprovedBy# for Approver Info, #ApprovedByDesignation# for Approver Designation, #ApprovedBySectionName# for Approver Section Name, #ApprovedByPost# for Approver Post, #ApprovedByEmail# for Approver Email, #ApprovedDate# for Date of Approval, #ApprovedByName# for Approver Name, #ApprovedBySectionName# for Approver Section Name, #ApprovedByEmail# for Approver Email, and #DocumentNumber# for Document Number.

2. Click on dispatch by CRU
3. In Dispatch options fill the CRU Details.
 - 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.
4. Rest of the step is same as shown in Dispatch by self (point no 6)

13. 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.

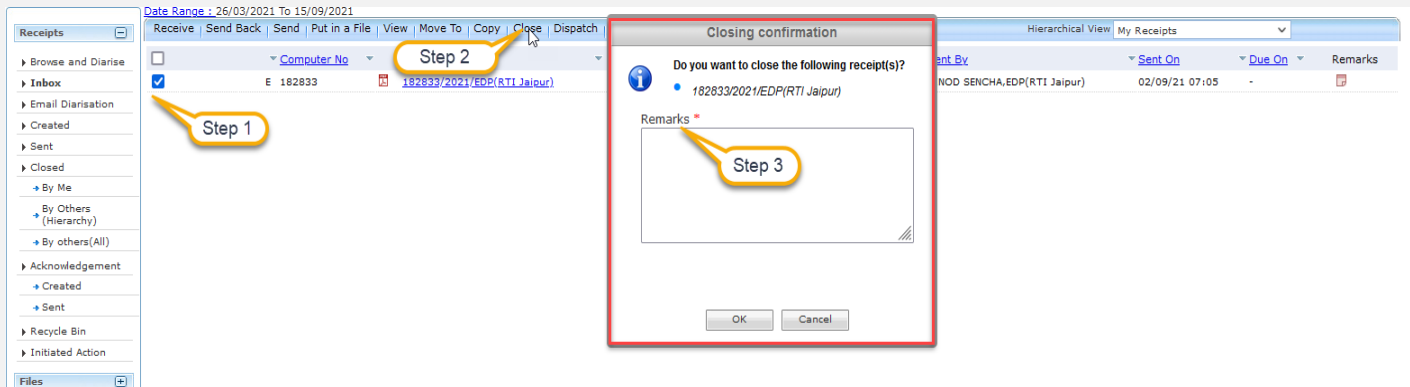
This section describes the process of closing receipts in Inbox.

Important Points:

- ✓ Receipt(s) which have attached files/receipts cannot be closed, they must be detached first.
- ✓ 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/Created using check box or Click a receipt number in inbox
2. Click 'Close' menu.



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

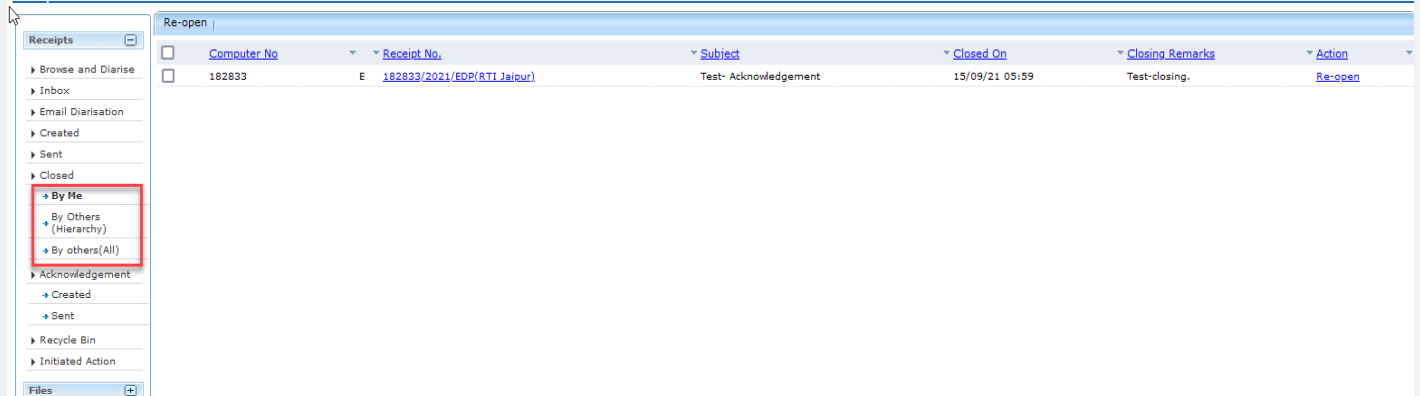
Receipt will move from Inbox/Created list to **Closed By Me** list.

13.1 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.



Closed (By Me) – It displays the list of receipts closed by self.

By Others (Hierarchy) –It displays the list of receipts closed by others users in the viewer's hierarchy.

By Others (All)- It displays the list of receipts closed by others users in the viewer's hierarchy down line.