# How to create an eFile

Click on the Files menu and it will show the options like Inbox, Created (Completed), Parked, Closed (By me), Sent, Create New, Create Part.

**Inbox** contains all the received files.

Created (Completed) contains all the created files.

Parked contains the files which are parked by us.

**Closed (By me)** contains the files which are closed by us.

Sent contains files sent by us.

**Create new Non SFS (Single File System),** Non SFS File means, a file whose number will be automatically generated by the E-Office Application itself. We have to select only the heads of the filing.

**Create Part,** Part file of any eFile which is under approvals or under submission can be created.

Files 😑
▶ Inbox (1)
Submitted Files for Closing Approval
▶ Created
- Drafts
- Completed
▶ Parked
Approval Requests
Bulk Closing
▶ Closed
→ By Me
<ul> <li>Submitted Files for</li> <li>Reopening Approval</li> </ul>
▶ Sent
Create New
Create Part
▶ Recycle Bin
Initiated Action

**Recycle Bin & Initiated Action,** are usually not activated in eFile suite.

**STEP 1:** Go to **Create New (Non SFS)** option in the Files menu to create the file. It will open a window, which asks to select the file heads and Subject. On the left side of the window, we can see the watermark as "Electronic", which means it is an "Electronic File". The window is shown below.

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**STEP 2:** In the File number, we select the options that are available as the file heads. eOffice application will generate the file number automatically. Other options are automatically filled by the eOffice Application itself.

**STEP 3:** Fill the file no. and description which are mandatory to create the file and click on the "**continue working**" and which will ask to create the file or not confirm box and press "ok".

Note: Adding Proper Description (Subject) & Remarks is important as it reflects in your inbox/created/sent you can easily identify the file.

	Continue Working >
	Confirm
1	File Number will be generated (Number generated will be final and cannot be edited). Do you wish to proceed?

After confirming, this will open the file by giving the file no automatically as shown below.



**STEP 4:** On the right side of the window, we will attach the receipts created by us or available in the receipts inbox, like the folios/correspondence in the physical file. On the left side we can create eFile. Now we will attach the receipt, which is present in our receipt inbox.

On Clicking on the **ToC tab** attach dialog box will be popped up.



Click on the **Attach**, which in turn opens the Receipts dialog box to select all the available in receipts inbox, both received and created. By selecting the one of the receipts and press the attach button the respective receipt will be attached at the right side of the window as shown below.

Sea	arc	ch for the receipt		×
		2019 ▼ Search		
		Computer Number	Receipt Number	Subject
	1	E 52	52(2)/2019/0/o ASST.GM/IT/CO/RCIL	Testing
0	1	E 52	52(1)/2019/0/o ASST.GM/IT/CO/RCIL	Testing
		Attach		«<1>»

In the **ToC**, by clicking on the Receipt/Issue No., receipt will be displayed in the right side of the window to check whether the Correct Receipt attached or not.

		ToC Recent All	Previous	Notings	1		
						Choose	eOne 🔻
•		Receipt/Issue No.	▼ <u>Subject</u>	<u>▼ Type</u> ▼	Attached On	* <u>Pages</u> *	Action **
Е	0	52(2)/2019/0/o ASST.GM/IT/CO/RCIL	(CC)-Testing	PUC1	01/07/19 12:09	1-1	Reopen
			Attach				

If not correct, we can detach the receipt by clicking on the ToC (Table of Contents) tab, check (select) on the check box and select the Choose One Drop down list box, Select the Detach. The selected Receipt will be detached. **Receipt cannot be detached after any Movement of eFile.** 

Note: Any document, which has been DSC, signed in Adobe Acrobat Reader DC when put in a file (After creating its Receipt).DSC sign will not be visible in merged Correspondence (PDF) of eFile.

One can view the DSC signed PDF by downloading the particular Receipt

					- /								
										List of Correspo	ondences and I	ssues	
52(2)/2019/0/o A \$ \$ T.GM/IT/CO/RCIL	J.C.	File No :	RCILCO-COU ASST.GM/IT/	PROJ(EO CO/RCIL-I	PFF)/3/2019 Part(1)	-0/0	~	Receipt	/Inde No.	1/17/00/001	▼ <u>Subject</u>	<u>▼ Type</u> ▼ <u>At</u>	ttached On 👻
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General		Sub Category :								11-23	Attach		
testing at co		Sent Date :	24/06/19 04:2	6 PM									
		Letter Date :											
Testing		Enclosures:											
By Post		Sender Type :											
5													
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# 1. How to Create a Noting on eFile?

We can write the Noting on the left side of the window.

There are two options which are available in the left window are "Add Green Note" and "Add Yellow Note".

Computer No: 96 File No: <u>RCILCO-COOPROJ(EOFE)/3/2019-O/o ASST.GM/IT/CO/RCIL-Part(1)</u> Subject: Testing1	X
Noting   Correspondence   Draft   References   Link   Details   Movements   Edit   Send   Attachment   More	Quick View
<b>Ξ</b> , ρ <sup>+</sup>	Recent All ₽ <sup>+</sup>
Add Green Note	1/1 Ó 🛓 👼 🗳
	1 52(2)/2019/0/o ASST.GM/IT/CO/RCIL
	test pdf.txt test pdf for file upload in eoffice - vikrant

**Green Note** means the normal noting that we do on green note sheets on usual files and are forwarded to another Officer/Supervisor/Staff. No one can edit a green note, which has been written by a user.

**Yellow Note** means a note akin to a yellow slip that is generally used by Private Secretaries or OSDs to assist an Officer in understanding summary of a file. This can be edited, deleted or confirmed by the next officer. Now we will proceed with a comparison -

Green Note	Yellow Note
Once the Green Note is sent in a file, it Can't be changed overwritten or deleted	It is a draft noting, which is not publ Until confirmed
It will be Published on Noting side with	After Writing the Yellow Note we ha
Sender's details.	the three options:-
It is always AutoSaved.	Edit: - Edit the Yellow Note. Discard: - Discard the Yellow Not
If Pulled Back by Sender, Green	<ul> <li>Confirm - Confirm the Yellow Not</li> </ul>
Note is then editable (only if not digitally signed).	Once the yellow note gets confirme noting is finalized and saved to mai
	Green Noting.
	Need to save, before sending.



Here one can type the Draft Noting as in MS Word.

After saving the eFile, version of file is displayed along with the "Edit" "Discard" and "Confirm" Options is as shown below.

**Edit** – By clicking on the Edit option, we can edit the eFile.

**Discard** - The changes will be discarded.

**Confirm** - The "Yellow note" will be converted into the "Green note".

Edit	Discard	Confirm
Version	Created On	<u>CreatedBy</u>
<u>1.0</u>	7/1/19 12:17 PM	ANISH SINGH GUSAIN

Note: Ensure to add Noting (Green or Yellow) before sending any eFile as by default eOffice Platform will publish a Blank Green Note by Sender.

In addition, at a time only one noting is active, either yellow note or Main Green sheet note.

# 2. <u>How to send the eFile?</u>

Click on **send** tab.

**Sending the file is same as the sending of receipts**. Click on the "Send" button, selecting the details of the Officer/Supervisor/Staff in the preferred list of the send dialog box. The eFile will be sent, and the details can be seen in the sent tab.

The **Pullback** option is available to the eFile also.

Comput	ter No: 96	File No: RCILCO-	COOPROJ(EOFF)/	/3/2019-0/o A	SST.GM/IT/CO	/RCIL-Part(1)	Subject: Te	sting1	
Notin	g Corres	pondence   Draft	References   L	Link   Details	Movements	Edit   <mark>Sen</mark>	d Attachment	More	
P) 🖉	+								ToC Recent All
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### Yellow notes cannot be digitally signed.

The Yellow Note is usually sent to the Officer for the corrections. In the receiver's inbox, to differentiate the Yellow and Green Note, on the Computer no. (Which is automatically generated by the eOffice Application) a Yellow colour highlighter is displayed which is shown below.



We cannot detach a receipt after movement of eFile.

# 3. How to Convert a Yellow Note to Green Note?

Whenever there are no corrections to be done, the Officer/Supervisor/Staff can confirm this note. It turns into green colour. By clicking on the "**Confirm**", the Yellow Note will be converted into Green Note on asking the confirmation dialog box and press "**Ok**" to convert.

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Edit	Discard	Confirm
Version	Created On	<u>CreatedBy</u>
1.0	7/1/19 12:17 PM	ANISH SINGH GUSAIN

After Converting the Green note, the left side of the window displayed in Greencolour and **the Green note auto saved.** 

Note: At a time only one noting is active, either yellow note or Main Green sheet note.



# 4. How to keep flags in an eFile for referencing?

# Flags for Correspondence Side

We use flags in a normal hard file to go directly and refer to a dak / page. In the Same way, we can keep flags in eOffice in Green note. Select the Text to which need the **Reference** in the right side folios/Correspondence.

≡ cFile Version 5.5_09	Search DAdvanced   🕢 🕒
Computer No: 93 File No: <u>RCILCO-COOPROJ(EOFF)/7/2019-0/o ASST.GN/IT/CO/RCIL</u> Subject: Demo	17
Noting   Correspondence   Draft   References   Link   Details   Movements   Edit   Send   Attachment   More	Quic Reference
Quick Noting + 📄 🗙	
Last Saved 11:06-2019 12:59:48 PM B I U E E E E Formals ↓ Line Height ▼ Paragraph ▼ Verdana ▼ 18pt ↓ E ▼ E 下 E 正 G 今 伊 摄 - Ω 爪 ¶、田▼ A ▼ ▲ ▼ ⑧ 発 English ▼ ⑦ ▼ ₹	15320190/b ASSLGMIL/CORCE
Digitisation Framework at Page Number - 10	In the overall transition to eOffice, the digitization of documents and files play a key role. Hence establishing a framework for digitization is critical for the transition to an electronic mode of functioning. The framework helps to build an integrated approach, connecting the areas that are considered essential in greparing the user department/ ministry for making the transition. The framework will include the Standrade, Policies, Guidelines and Best Practices that will help ary organization intending to implement eOffice.
	The Digiti action Framework has been de signed to be incyne with the overall eOffice Implementation The overall framework illustrated in the figure below, depicts the areas that include the Governance

Select the note for which reference needs to be marked(shown as above "Page Number 10") then Click on the reference icon on the top right of the Folios which is shown below and give the input as reference page no of the right side folios.





# Flags for Noting Side

Write noting on Green Note and go to previous Noting on right side of the Previous Noting Window.



Now select the written note on left and then **Reference**, a pop-up for "**Refer Noting**" will appear in which one can refer noting via Page No. or via Note No.

Noting   Correspondence   Draft   References   Link   Details   Movements   Edit   Send Back   Send   Attachment   More	Quick View
Couck Noting V 🗟 🗙	ToC Recent All (Previous Notings) *** \$\mathcal{P}^{+} \box[1] \$\mathcal{B}_{1}\$ \$\mathcal{B}_{2}\$ \$\m
Last Saved 01:07-2019 01:14:3         ● By Page No. ○ By Note No.           B I 및 ■ = =         Page No.*	13/06/2019 1:29 PM ANISH SURGH GUSAIN (SR.MANAGER/IT/CO/RCIL) Digitally Signed
IE + E + E E E Ok Cancel Note no. 4	Page: 1
	Note # 4 Draft created pls check
	13/06/2019 1:37 PM ANISH SINGH GUSAIN (SR.MANAGER/IT/CO/RCIL)
	Draft is updated with ver 1.1

Hyperlink/Reference will only be activated once the eFile is moved.

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