Workshop on E-Office
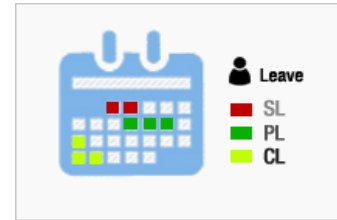# (File Management System)

CONTENTS

About e-Office

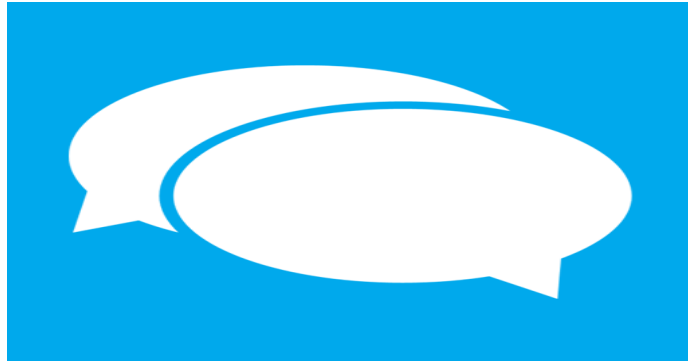# Modules in e-office package

Knowledge Management

File Management System

Leave Management System

Tour Management System

Chat and Collaborative Messaging

Personal Information Management System

Basic pre-requisite

1. NIC NET /SWAN
2. NIC/GOI Email ids
3. Scanners
4. Digital Signatures
5. Core 2 Duo Processors and above
6. 2 GB RAM and above
7. Windows 7 and above
8. IE 9 and above or Mozilla (ESR version)

File Management System

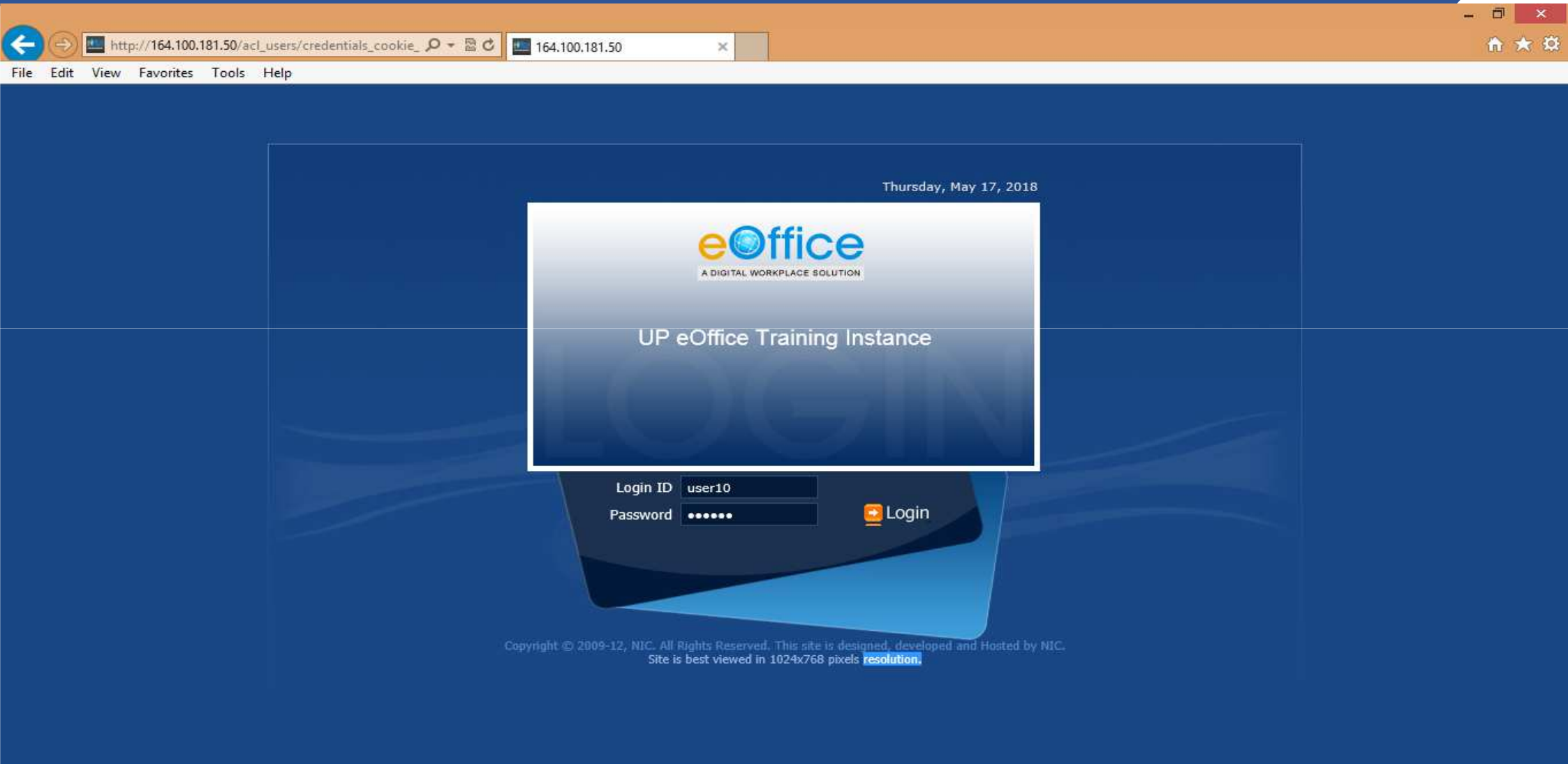|			
Workflow based system	Efficient, transparent, accountable	Components like receipt, noting , draft, dispatch	Keeping record and tracking movement
It saves time, effort and money	Diarize once use always	Tampered proof noting	Draft versions gets maintained
Facility to dispatch via post/mail	Reference tagging and attachment allowed	File/ Receipt can be attached with another File/ receipt	A file can also be linked with another file

Login Screen

E-Office Dashboard

File Management System-Inbox

Receipt inbox

Browse & Diarize (Pdf up to 20 MB,

Created (similar to draft in any mail system)

Search | Advanced

Date Range : 24/03/2015 To 17/05/2018

Send | Put in a File | Copy | Dispatch | View | Generate Acknowledgement

Hierarchical View My Receipts

Receipts

- Browse and Diarise
- Inbox (29)
- Email Diarisation
- Created
- Sent
- Closed
  - By Me
- Acknowledgement
  - Created
  - Sent
- Recycle Bin
- Initiated Action

Files

Migrate File

Dispatch

DSC

Settings

Notification

Ext Department

			Computer No		Receipt No.		Subject	Subject Category	Created On	
☐		E	5143		5143/2017/AE		kdfootkmdjjf	ACR	27/11/17 04:52	
☐		E	5123		5123/2017/AE		GPF aur charitr panjika k sambandh m	ACR	27/11/17 04:28	
☐	VIP	E	2180		2180/2017/AE		fghj	Appointments	26/09/17 06:13	
☐	VIP	E	2132		2132/2017/AE		kl;;	ACR	26/09/17 05:33	
☐	VIP	E	2104		2104/2017/AE		meeting	Miscellaneous Files	26/09/17 05:23	
☐	VIP	E	1600		1600/2017/AE		acr	ACR	20/09/17 05:35	
☐		E	1303		1303/2017/AE		gjghj	ACR	17/09/17 07:11	
☐	VIP	E	1119		1119/2017/AE		development	ACR	15/09/17 05:57	
☐	VIP	E	1100		1100/2017/AE		deveiopment	ACR	15/09/17 05:35	
☐		E	846		846/2017/AE		bch	ACR related matters	12/09/17 01:16	

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

Send Page

In 'To' option we can select the receiver of the letter (typing not allowed)	We can mark a copy to more than one officer	An officer can put 'Due Date' to Subordinate Officer	'Action' and 'Priority' can be also set while sending	Remark can also be written

eFile   Version 5.5   Search [ ] Advanced | ⑦ 🗎 ⬡

Receipts ⊟
- ▸ Browse and Diarise
- ▸ Inbox (29)
- ▸ Email Diarisation
- ▸ Created
- ▸ Sent
- ▸ Closed
  - → By Me
- ▸ Acknowledgement
  - → Created
  - → Sent
- ▸ Recycle Bin
- ▸ Initiated Action

Files ⊞
Migrate File ⊞
Dispatch ⊞
DSC ⊞
Settings ⊞
Notification ⊞
Ext Department ⊞

Send

Organization :   AE

To [   ]

Cc [   ]

(Use semicolon(;) to seperate recipients.)
Note : CC copies are non-editable (both pdf and metadata). Any change in the Main receipt will be reflected in the CC copies, till the time not put inside the file

Set Due Date [   ] 📅

Action [Forward ▾]

Priority [Choose one ▾]

Total 1000 | 1000   characters left.

Remarks [   ]

[Send]

	Receipt Number	Subject
☑	⊞ 📁 5143/2017/AE	kdfootkmdjjf

Put in a File

Search File To Attach

Create File

Year 2018 ⌄   Search [   ]

	Computer Number	File Number	Subject
○	P 5898	11	New Work Order
○	E 5933	D-20013/1/2018-agriculture education-AE	issue license

<< < 1 > >>

Attach

Draft-Create New Draft

A draft is a reply to a letter or any fresh communication by the department	A draft can always be created in a File/Receipt	A version gets maintains after every editing and marking	Officers with approver role, only can approve the DFA	A unique computer no. gets generated for each DFA

Send | Put in a File | Copy | Dispatch | Details | Movements | Edit | Attach File | Attach Receipt | Generate Acknowledgement |

New Draft   Choose from Template(s)   or   Upload File

B I U S | Formats ▾ Paragraph ▾ Verdana ▾ 14px ▾

English ▾

p » span   Words: 0

Draft Details

Draft Type*	Reply	▾	Classified	Choose one	▾
Draft Nature	Choose One	▾	Prefix	Choose One	▾
Language*	English	▾			

Subject *   GPF aur charitr panjika k sambandh m
Total 1000 | 964 characters left.

Receipt Number	5123/2017/AE ▾	Reply Type	Choose one ▾

Communication Details

Ministry	Choose one ▾		
Department	सचिवालय ▾		
Name*	Pratigya chauhan	Designation*	Anubhag Adhikari
Organization			
Address 1 *	UP sachivalay' Lucknow		
Address 2			
Country	INDIA ▾	State	Choose one ▾
City		Pincode	
Mobile		Landline	
Fax		Email	

Add More Recipient(s)   Clear

Attachments   Attach File

Note :
Use **#ApprovedBy#** For Approver Info.
Use **#ApprovedByName#** For Approver Name.
Use **#ApprovedByDesignation#** For Approver Designation.
Use **#ApprovedBy SectionName#** For Approver Section Name.
Use **#ApprovedDate#** For Date of Approval.

Save

Draft

Send | Put in a File | Copy | Dispatch | Details | Movements | Edit | Attach File | Attach Receipt | Generate Acknowledgement |

Draft No. : DFA/1401 - V 1.0 **Draft Status :** DFA

Preview | Approve | Edit

Draft for approval

draft reply

Draft Details

Draft Type*	Reply ▼	Classified	Choose one ▼
Draft Nature	Choose One ▼	Prefix	Choose One ▼
Language*	English ▼		

Subject *

kl;;

Total 1000 | 996 characters left.

Receipt Number	2132/2017/AE ▼	Reply Type	Choose one ▼

Communication Details

Attachments

Attach File

Note :
Use #ApprovedBy# For Approver Info.
Use #ApprovedByName# For Approver Name
Use #ApprovedByDesignation# For Approver Designation.
Use #ApprovedBySectionName# For Approver Section Name.
Use #ApprovedDate# For Date of Approval.

Dispatch Screen

Send | Put in a File | Copy | Dispatch | Details | Movements | Edit | Attach File | Attach Receipt | Generate Acknowledgement |

Draft No. : DFA/1401 - V 1.0 **Draft Status :** Approved

Draft Details

Draft Type*	Reply ▼	Classified	Choose one ▼
Draft Nature	Choose One ▼	Prefix	Choose One ▼
Language*	English ▼		
Subject *	kl;;		
	Total 1000 | 996 characters left.		
Receipt Number	2132/2017/AE ▼ 📄	Reply Type	Choose one ▼

Communication Details

Ministry	Cabinet secretariat ▼		
Department	Choose one ▼		
Name*	rr	Designation*	dm
Organization			
Address 1 *	dfg		
Address 2			
Country	ARMENIA ▼	State	Choose one ▼
City		Pincode	
Mobile		Landline	
Fax		Email	

Add More Recipient(s)   Clear

Attachments

Attach File

Note :
Use #ApprovedBy# For Approver Info.
Use #ApprovedByName# For Approver Name
Use #ApprovedByDesignation# For Approver Designation.
Use #ApprovedBySectionName# For Approver Section Name.
Use #ApprovedDate# For Date of Approval.

draft reply

Dispatch By Self | Dispatch By CRU | Edit

Dispatch- By mail/Post

Send | Put in a File | Copy | Dispatch | Details | Movements | Edit | Attach File | Attach Receipt | Generate Acknowledgement |

Draft No. : DF/V/1401 - V 1.0 Draft Status : Approved

draft reply

Attach File

Attachments

Attach File

Dispatch Options

☐ **Email Details**

☑ **Postal & Out Register Details**

Postal Mode	Choose One ▼	Postal Charge	
Medium	Choose One ▼	Weight	
Mode Number			
Peon Book No		Peon Name	Choose One ▼
Out Date	🗓	Out Time	
Delivery Date	🗓	Delivery Time	
Delivery Status	Choose one ▼		

Note :
Use **#ApprovedBy#** For Approver Info.
Use **#ApprovedByName#** For Approver Name
Use **#ApprovedByDesignation#** For Approver Designation.
Use **#ApprovedBySectionName#** For Approver Section Name.
Use **#ApprovedDate#** For Date of Approval.

Dispatch can be send through e mail or by post

Either send it with follow up or without follow up

Send With Followup   Send Without Followup

File- Crete New- (Non-SFS)

To create a new file

File creation- File cover

File Heads

Government Of Uttar Pradesh

AE
agriculture education

File No.* [Ch ⌄] [Ch ⌄] [Ch ⌄] [Ch ⌄] [_____] [2018] [agricul ⌄]

Subject

Description*: [_____]

Category   Main: [Choose one ⌄]
            Sub: [Choose One ⌄]

Other Details

Classified [ ] [Choose One ⌄]

Remarks   [_____]

Previous Reference [_____]   Later Reference [_____]

Continue Working ➤

Once file No. generated. it cannot be changed

Correspondence (to attach a letter into File)

File Created

Computer No: 6031   File No: B-12013/1/2018-agriculture education-AE   Subject: cover

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

ToC: Table of Content

ToC   Recent   All

Add Green Note   Add Yellow Note

Letter section

Noting section:
1. Green Note
2. Yellow Note

eoffice

Yellow Note

Draft Creation

Select create new draft after clicking draft

Rest of the steps are same as in case draft in receipt section

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

Quick View

Quick Noting ▾ 🖫 ✖

ToC   Recent   All   Previous Notings

Noting saved at 17-05-2018 01:32:18 PM   *To refer correspondence, please click on "All" tab.

B I U S ≡ ≡ ≡ ≡ Formats ▾ Paragraph ▾ Verdana ▾ 14px ▾

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👁 ⛶ English ▾ ⏰ ▾ ₹

yellow note

p » span   Words: 1

Attach

List of Correspondences and Issues

Choose One ▾

		Receipt/Issue No.	Subject	Type	Attached On	Pages	Action
☐	▾						
☐	E	5531(3)/2017/AE	(CC)-confidential		28/12/17 04:07	1-108	Reopen

Attach

Expectations from the Districts

Infra GAP analysis (H/W, S/W, DSC, Scanners)

Preparation of GAP analysis report

DSC/E-mail id preparation

File heads/EMD Data preparation

To ensure training/workshop for district officials

To ensure handholding on e-Office to officials

Archival policy on physical papers

Decision on files to start with e-Office

Strategy for transition of legacy files (2nd phase)

Ensure Transfer/ retirement case management (EMD)

Decision on CRU /individual level diarization

To work from remote location, VPN is required

Question and Answers

Helpline

- Helpline Number: 0522-2286808/809

- Email ID: praveenuplc@gmail.com

Thank you…