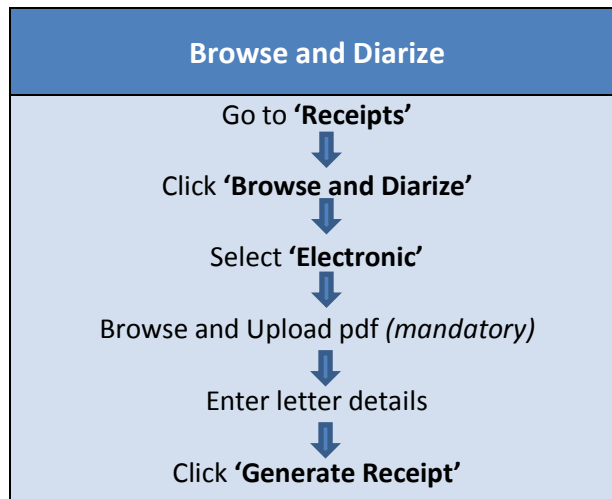


File Management System (eFile)

1. Process name – Diarization

(Go to the URL → Enter User Name and Password → FMS → Receipt)

Browse and Diarize



Actions performed –

Forwarding the receipt to others	Save the receipt generated without sending it further	Copying the details of the generated receipt to create a new receipt
Go to 'Receipts' ↓ Click 'Browse and Diarize' ↓ Generate Receipt ↓ Enter 'To' / 'Cc' ↓ Click 'Send'	Go to 'Receipts' ↓ Click 'Browse and Diarize' ↓ Generate Receipt ↓ Click 'Send to draft'	Go to 'Receipts' ↓ Click 'Browse and Diarize' ↓ Generate Receipt ↓ Click 'Copy' ↓ Upload pdf ↓ Edit the details (<i>if necessary</i>) ↓ Click 'Generate Receipt'

2. Process name – After receiving the file/receipt in Inbox

Actions performed –

(For Receipts only)

Attachment of file to receipt for reference	Dispatching a reply against a receipt	Display details of Dispatch History and Referenced Files	Attachment of receipt to file (optional)
Go to 'Receipts' ↓ Click 'Inbox' ↓ Select a receipt ↓ Click 'Attach file' ↓ Select the respective file ↓ Click 'Attach'	Go to 'Receipts' ↓ Click 'Inbox' ↓ Select a receipt ↓ Click 'Dispatch' ↓ Enter the details ↓ Click 'Dispatch By Self/CRU'	Go to 'Receipts' ↓ Click 'Inbox' ↓ Select a receipt ↓ Click 'Details'	Go to 'Receipts' ↓ Click 'Inbox' ↓ Select the receipt ↓ Click 'Put in a file' ↓ Select the respective file ↓ Click 'Attach'

(For Files only)

Details of the File/receipt movement	Close File	Park File	Details of part files and volumes if created
Go to 'Files' ↓ Click 'Inbox' ↓ Open a file/receipt ↓ Click 'Movements'	Go to 'Files' ↓ Click 'Inbox' ↓ Open a file ↓ Click 'More Action' ↓ Select 'Close File' (Only by the creator of the file) ↓ Enter Closing Remarks ↓ Click 'Close'	Go to 'Files' ↓ Click 'Inbox' ↓ Open a file ↓ Click 'More Action' ↓ Select 'Park File' ↓ Enter Remarks and Reminder Date ↓ Click 'OK'	Go to 'Files' ↓ Click 'Inbox' ↓ Open a file ↓ Click 'Details'

3. Process name – Forwarding and Replying a File/Receipt to other users

(Go to the URL → Enter User Name and Password → FMS → Files/Receipt)

Forward/Reply

Forward			Reply	
<p>Go to 'Files/Receipts'</p> <p>↓</p> <p>Click 'Inbox'</p> <p>↓</p> <p>Select a file/receipt</p> <p>↓</p> <p>Click 'Forward'</p> <p>↓</p> <p>Enter 'To/Cc'</p> <p>↓</p> <p>Enter 'Action/Priority' <i>(optional)</i></p> <p>↓</p> <p>Click 'Send'</p>	<p>OR</p> <p>Go to 'Files/Receipts'</p> <p>↓</p> <p>Click 'Inbox'</p> <p>↓</p> <p>Select quick action for forward</p> <p>↓</p> <p>Enter 'To/Cc'</p> <p>↓</p> <p>Enter 'Action/Priority' <i>(optional)</i></p> <p>↓</p> <p>Click 'Send'</p>	<p>OR</p> <p>Go to 'Files/Receipts'</p> <p>↓</p> <p>Click 'Inbox'</p> <p>↓</p> <p>Open a file/receipt</p> <p>↓</p> <p>Click 'Send'</p> <p>↓</p> <p>Enter 'To/Cc'</p> <p>↓</p> <p>Enter 'Action/Priority' <i>(optional)</i></p> <p>↓</p> <p>Click 'Send'</p>	<p>Go to 'Files/Receipts'</p> <p>↓</p> <p>Click 'Inbox'</p> <p>↓</p> <p>Select a file / receipt</p> <p>↓</p> <p>Click 'Reply'</p> <p>↓</p> <p>Enter 'To/Cc'</p> <p>↓</p> <p>Enter 'Action/Priority' <i>(optional)</i></p> <p>↓</p> <p>Click 'Send'</p>	<p>OR</p> <p>Go to 'Files/Receipts'</p> <p>↓</p> <p>Click 'Inbox'</p> <p>↓</p> <p>Select a quick action for reply</p> <p>↓</p> <p>Enter 'To/Cc'</p> <p>↓</p> <p>Enter 'Action/Priority' <i>(optional)</i></p> <p>↓</p> <p>Click 'Send'</p>

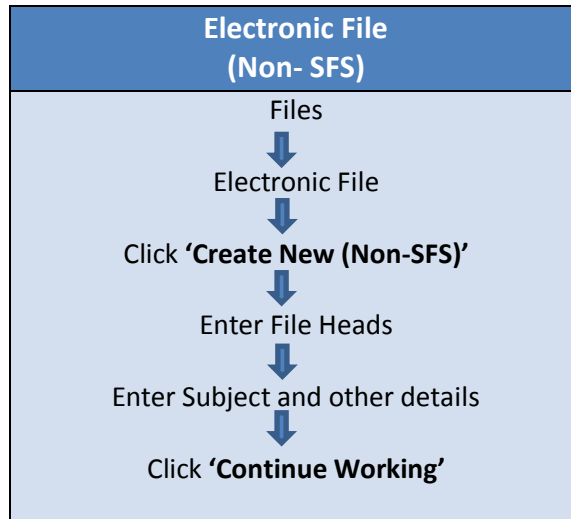
Actions performed –

Pullback the file/receipt	Follow up	View of the sent file/receipt	Part file (only for files)
<p>File/Receipts</p> <p>↓</p> <p>Sent</p> <p>↓</p> <p>Click the icon for Pullback against the file/ receipt to be pulled back</p>	<p>File/Receipts</p> <p>↓</p> <p>Inbox/Sent</p> <p>↓</p> <p>Select the file</p> <p>↓</p> <p>Click 'Mark As'</p> <p>↓</p> <p>Select 'New FollowUp'</p> <p>↓</p> <p>Select the severity</p> <p>↓</p> <p>Enter the FollowUp action</p> <p>↓</p> <p>Select the Alert Mode</p> <p>↓</p> <p>Select the date and time</p> <p>↓</p> <p>Click 'Save'</p>	<p>File/Receipts</p> <p>↓</p> <p>Sent</p> <p>↓</p> <p>Click the file/receipt number to view the sent file/receipt</p>	<p>Files</p> <p>↓</p> <p>Sent</p> <p>↓</p> <p>Select the particular file against which a part file is created</p> <p>↓</p> <p>Click Create Part</p>

4. Process name – Opening/Creating a new File

(Go to the URL → Enter User Name and Password → FMS → Files → Create New)

Create New File (Non SFS)



Actions performed –

Link/Delink Files	Edit the details on the cover-page of the file	Send
Files ↓	Files ↓	Files ↓
Create New ↓	Create New ↓	Create New ↓
Click ' Link/Delink ' ↓	Click ' Edit ' ↓	Click ' Send ' ↓
Click ' Attach ' ↓	Modify the details except the File number ↓	Enter ' To ' ↓
Choose file ↓	Click ' Save '	Click ' Send '
Click ' Attach '		

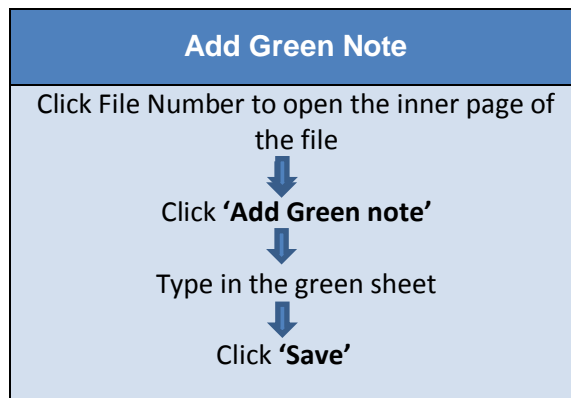
Actions performed –

Add Green Note	Add Yellow Note	Attach Correspondences	Drafting a fresh letter/Reply	References
<p>Files ↓ Create New ↓ Click 'Add Green Note' ↓ Type the Noting ↓ Click 'Save' <i>(For Details Refer Process 5)</i></p>	<p>Files ↓ Create New ↓ Click 'Add Yellow Note' ↓ Type the Note ↓ Click 'Save' <i>(For Details Refer Process 5)</i></p>	<p>Files ↓ Create New ↓ Click 'Correspondences' ↓ Click 'Attach' ↓ Choose a receipt ↓ Click 'Attach'</p>	<p>Files ↓ Create New ↓ Click 'Draft' ↓ Select 'Create new Draft' ↓ Click 'New/Fresh' or 'Reply' ↓ Enter details ↓ Type a letter ↓ Click 'Save' <i>(For Details Refer Process 6)</i></p>	<p>Files ↓ Create New ↓ Click 'References' ↓ Local references ↓ Click 'Browse' ↓ Choose a document ↓ Click 'Attach'</p>

5. Process name – Noting

(Go to the URL → Enter User Name and Password → eFile → Files → Create New/ Completed/ Inbox → Click File number)

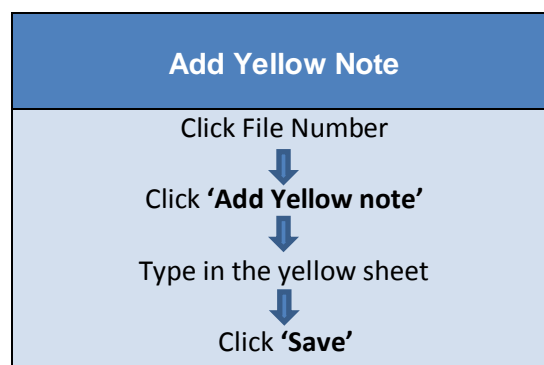
Add Green Note



Actions performed –

Reference to Correspondence	Reference to previous noting
<p>Click 'Add Green Note'</p> <p>↓</p> <p>Type in the green sheet</p> <p>↓</p> <p>Select text to be referred</p> <p>↓</p> <p>Click the reference button</p> <p>↓</p> <p>Click 'Save'</p>	<p>Click the file number</p> <p>↓</p> <p>Click 'Previous noting'</p> <p>↓</p> <p>Click paragraph button</p> <p>↓</p> <p>Click 'Add Green Note'</p> <p>↓</p> <p>Type in the green sheet</p> <p>↓</p> <p>Select text to be referred</p> <p>↓</p> <p>Click the paragraph number from the previous noting</p> <p>↓</p> <p>Click 'Save'</p>

Add Yellow Note



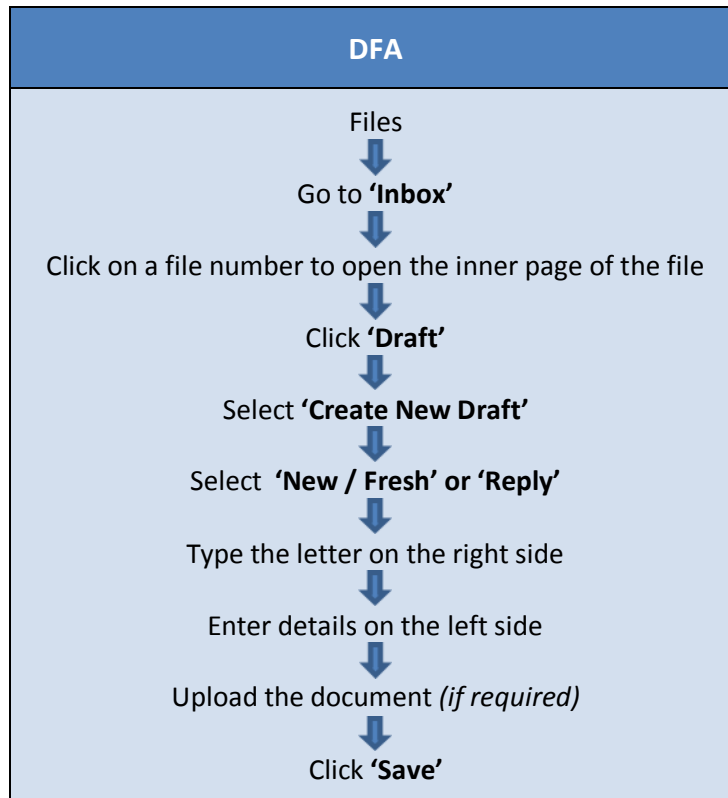
Actions performed –

Editing text in yellow note	Discarding Yellow Note	Confirming Yellow Note
<p>Click file number</p> <p>↓</p> <p>Click 'Edit'</p> <p>↓</p> <p>Click 'Save'</p>	<p>Click the file number</p> <p>↓</p> <p>Click 'Discard'</p>	<p>Click the file number</p> <p>↓</p> <p>Click 'Confirm'</p>

6. Process name – Creation, Approval and Dispatch of DFA in Files

(Go to the URL → Enter User Name and Password → FMS → Files → Inbox → Open selected file → Draft)

Creation of DFA



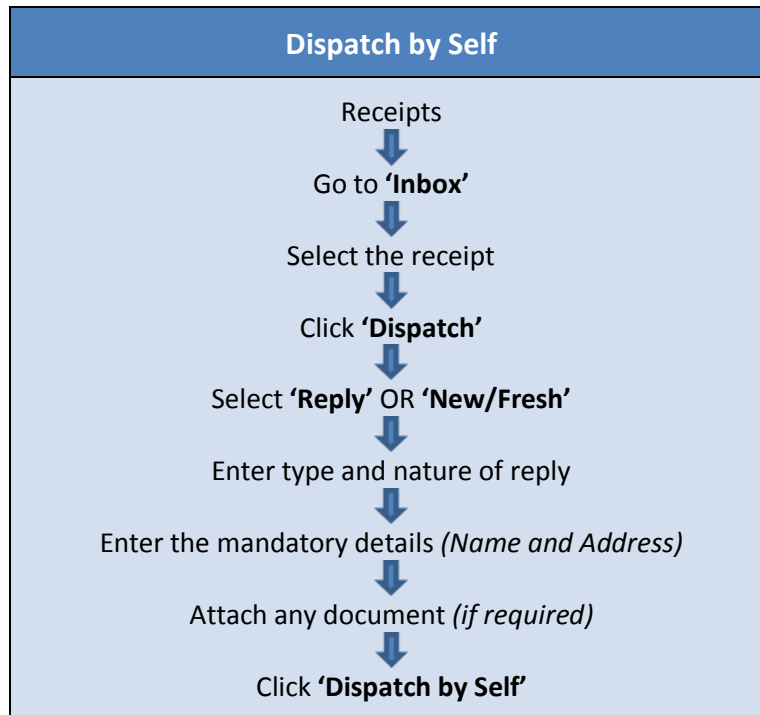
Actions performed –

Drafting fresh letter	Drafting reply	Approval of DFA	Dispatch of DFA (by Self)	Dispatch of DFA (By DND/CRU)
<p>Files ↓ Go to 'Inbox' ↓ Click on a file number to open the inner page of the file ↓ Click 'Draft' ↓ Select 'Create New Draft' ↓ Click 'New/Fresh' ↓ Enter details ↓ Type a letter ↓ Click 'Save'</p>	<p>Files ↓ Go to 'Inbox' ↓ Click on a file number to open the inner page of the file ↓ Click 'Draft' ↓ Select 'Create New Draft' ↓ Click 'Reply' ↓ Browse the receipt against which the reply is to be created ↓ Enter 'Reply Type' ↓ Type a letter ↓ Click 'Save'</p>	<p>Files ↓ Go to 'Inbox' ↓ Click on a file number to open the inner page of the file ↓ Click 'Draft' ↓ Select 'View draft' ↓ Click 'DFA number' or the 'Version of DFA' ↓ Click 'Approve' ↓ Click 'Send'</p>	<p>Files ↓ Go to 'Inbox' ↓ Click on a file number to open the inner page of the file ↓ Click 'Draft' ↓ Select 'View draft' ↓ Click 'DFA number' with status 'Approved' ↓ Click 'Dispatch by Self' ↓ Select 'By Post / Mail' ↓ Enter the necessary details ↓ Click 'Send'</p>	<p>Files ↓ Go to 'Inbox' ↓ Click on a file number to open the inner page of the file ↓ Click 'Draft' ↓ Select 'View draft' ↓ Click 'DFA number' with status 'Approved' ↓ Click 'Dispatch by DND' ↓ Select 'DND user' and 'Delivery Mode' ↓ Enter 'Remarks' ↓ Click 'OK'</p>

7. Process name – Sending of Issual against a standalone Receipt

(Go to the URL → Enter User Name and Password → FMS → Receipt → Dispatch)

Dispatching a DFA against a Receipt



*Letter dispatched through the option "Dispatch by Self" can be seen in the 'Sent' of the Dispatch module of the Officer.

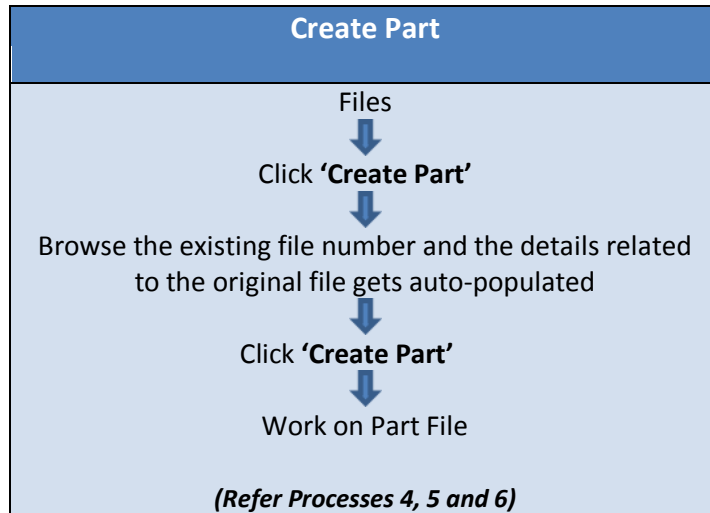
Actions Performed –

Sent	Returned	
Print Envelope	Receive	Resend
Files	Select a particular Receipt	Select a particular Receipt (with complete details and attachments)
↓	↓	↓
Go to 'Dispatch'	Click 'Receive'	Click 'Resend'
↓		
Click 'Sent'		
↓		
Select a dispatched letter		
↓		
Click 'Print Envelope'		
↓		
Save and take a printout		

8. Process name – Creation of Part files

(Go to the URL → Enter User Name and Password → FMS → Files → Create Part)

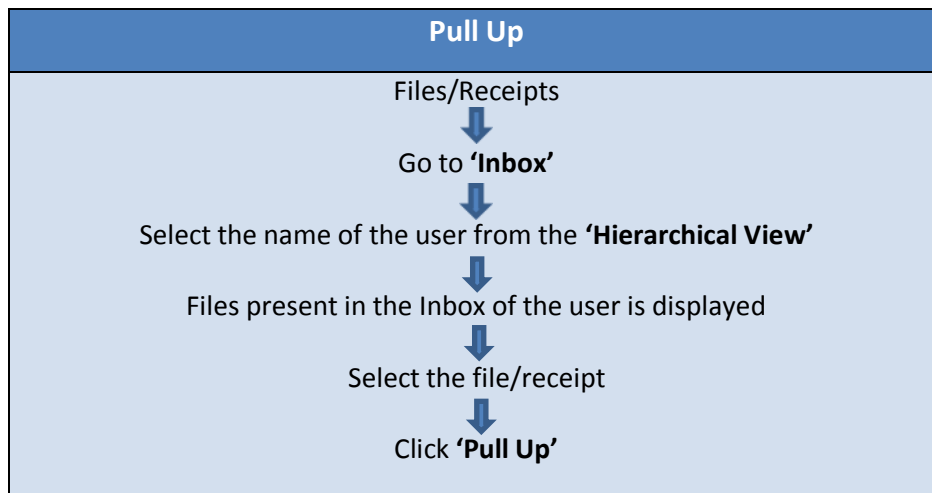
Create Part



9. Process name – Pull Up

(Go to the URL → Enter User Name and Password → FMS → Files/Receipts)

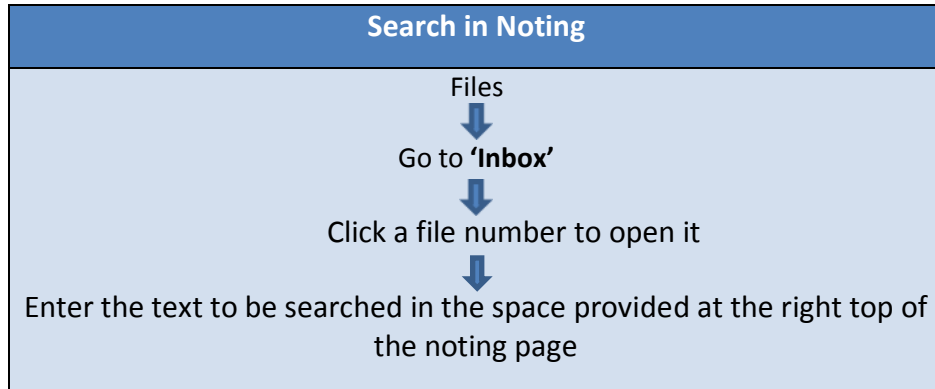
Pull Up



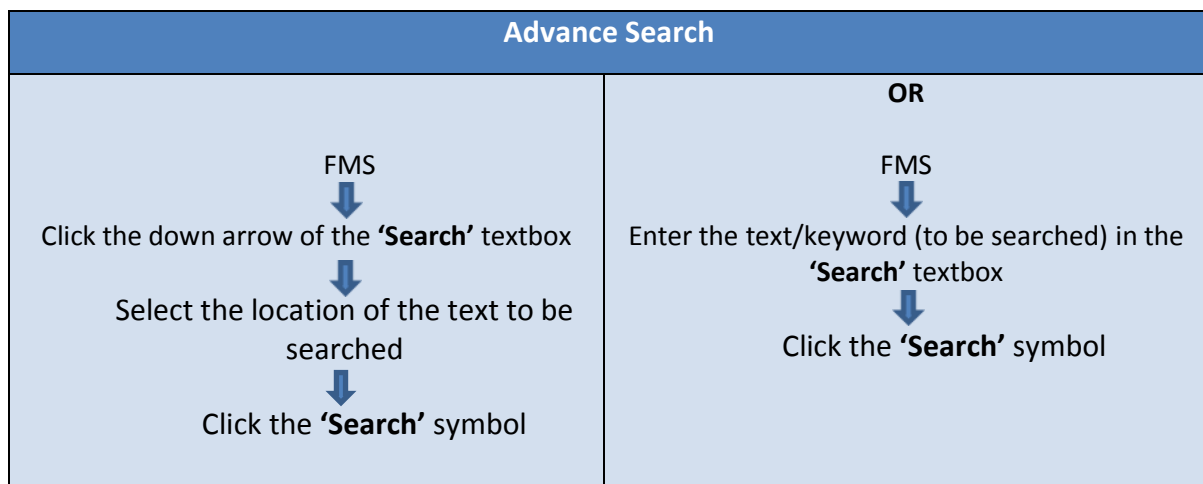
10. Search

(Go to the URL → Enter User Name and Password → FMS)

10. a. Search in Noting



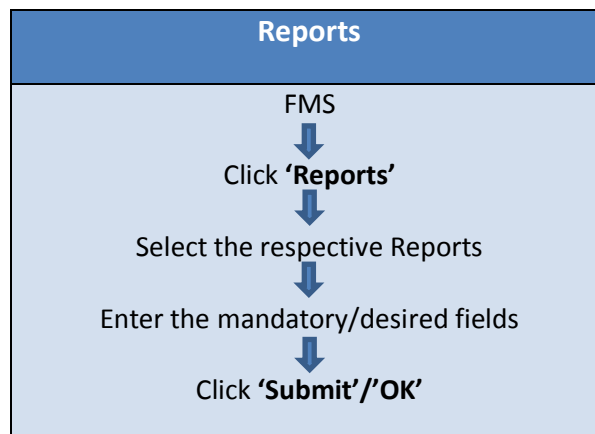
10. b. Advance search



11. Reports

(Go to the URL → Enter User Name and Password → FMS)

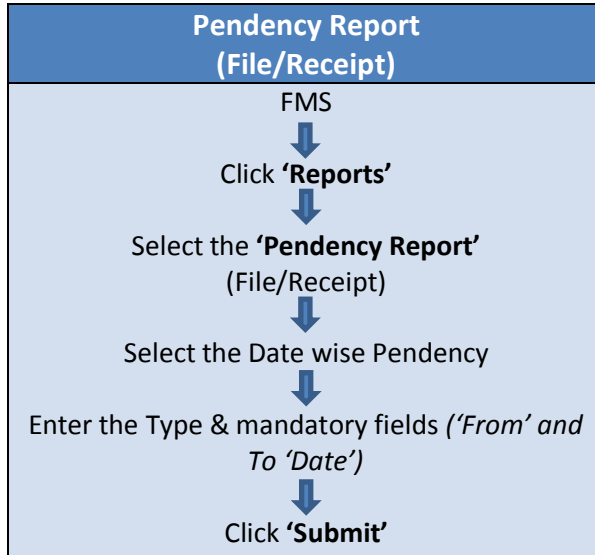
Reports –



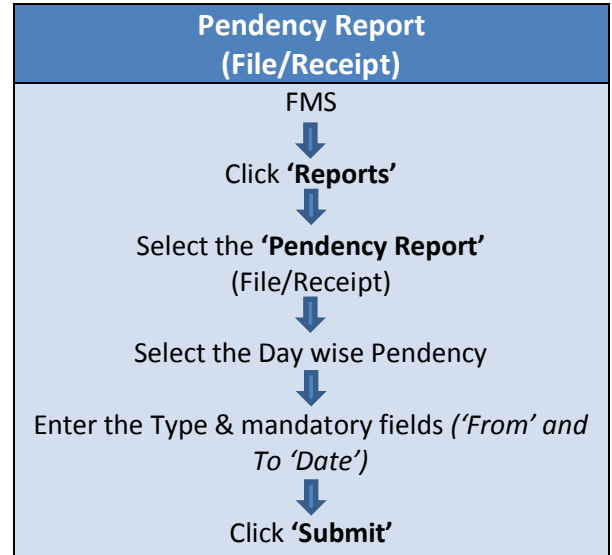
11. a. Pendency Report

Two types of pendency reports can be generated –

* Date wise Pendency



* Day wise Pendency



11. b. Movement Reports

