



सत्यमेव जयते

অসম চৰকাৰ

Govt of Assam

HANDBOOK ON

# E-office



**Assam Administrative Staff College**

Jawaharnagar, Khanapara,  
Guwahati-781022, Assam Phone: 0361-2363325,

Website: [www.aasc.gov.in](http://www.aasc.gov.in)

ARTPPG Department, GoA

ড° হিমন্ত বিশ্ব শর্মা  
Dr. Himanta Biswa Sarma



মুখ্যমন্ত্রী, অসম  
Chief Minister, Assam



## FOREWORD

The work environment across the globe is undergoing rapid changes, and the utilization of human resources is evolving accordingly, with Assam being no exception. To keep pace with these changes, it is imperative that the Assam government focuses on empowering its human resources with a global outlook while remaining grounded in Indian values.

To achieve this vision, our government is implementing effective changes in work culture and striving to instill new ideas and a broader perspective in the minds of the officials. In line with this effort, the ARTPPG Department of the Government of Assam is introducing a set of training manuals and handbooks. Our Government is ensuring the smooth functioning of the daily administration with the help of these Training Manuals/ Handbooks for the Grade-3 officials. To effectively cater to the requirements of Grade-3 officials, experts have meticulously drafted the training manuals and handbooks, aiming to cover a wide range of relevant topics. Moreover, focused attempts have been made to embed the books with relevant case studies, examples and FAQs on different topics to enable the users to adapt to the procedural yet divergent needs of today's dynamic administration.

True to the objective of our Government in creating a spirited workforce, introduction of multifaceted learning and training programme have been thought of to enable our officials realize their true potential. This would help them to reorient themselves to the day-to-day administrative developments while performing their duties with honesty and transparency.

I believe the Training Manuals / Handbooks will hold immense value as a guiding light on diverse professional trajectories. They will also serve as a roadmap to steer capacity building of the Grade-III officials in a systematic and coherent manner.

(Dr. Himanta Biswa Sarma)

**Dr. Ravi Kota, IAS**  
Chief Secretary  
Government of Assam



ড° ৰবি কোটা, ভাঃ প্ৰঃ সেঃ  
মুখ্য সচিব  
অসম চৰকাৰ



Preparation of a Training policy of a State and aligning it with the needs of the variegated workforce which has to constantly prove its relevance in this era of transition towards technology forms the very backbone of the administration in the form of a challenging task. In this due course of action, capacity building of Grade-III officials not only requires them to remain efficient in their daily official duties but also must be able to motivate them to work, learn and evolve in a comprehensive manner.

The present District training manuals for Grade-III officials have been prepared under the aegis of the Administrative Reforms Training Pension and Public Grievances Department (ARTPPG) and the Assam Administrative Staff College (AASC), who were aided by renowned experts and stakeholders from all the concerned fields. The manuals are a product of much detailed and multiple deliberations on the requisite subjects and it also includes valuable inputs from The Institute of Secretariat Training and Management (ISTM), Delhi in certain applicable topics. The Training Needs Assessment (TNA) was diligently conducted by AASC to chalk out an inclusive need based approach suited for a bottom up perspective for the Grade-III officials and also to ensure that no vital subject has been overlooked.

I believe that the Training manuals will help the Trainers and the trainees as well in a holistic manner and I earnestly request all concerned to send us feedback which would be of great help when we take up further revisionary exercises.

(Dr. Ravi Kota)  
Chief Secretary, Assam

Shantanu Gotmare, IAS  
Commissioner & Secretary  
to the Govt. of Assam  
ART, PPG etc. Department  
Dispur, Guwahati-6



### MESSAGE

The Department of Administrative Reforms, Training, Pension and Public Grievances (ARTPPG) plays a vital role in the formulation of the State Training Policy and training its civil servants to build capacity for improving 'Ease of Living' for people of Assam.

The content of the district training manuals aims to bolster capacity of the Grade-3 employees in an elaborate and lucid manner. We have worked meticulously to prepare content of the manuals by collaborating with experts and have actively collated through appropriate stakeholders, which objectively present a comprehensive picture for the officials, covering a broad spectrum of their daily official duties.

I express my sincere thanks to the Committee for vetting the full content. ARTPPG acknowledges the contributions of Committee Members in the preparation of the training manuals. Special mention must be made to the Assam Administrative Staff College, Khanapara and my team in ARTPPG Department for relentless work to get the training manuals.

I sincerely hope that these manuals will be extremely useful to the trainers, trainees and as well as the officials.

(Shantanu Gotmare)





## **Foreword**

The District Training Manuals for Grade-III officials of the Government of Assam have been designed by the Assam Administrative Staff College (AASC) with the help of renowned guest faculty and experts under the able guidance of the Administrative Reforms, Training, Pension and Public Grievances (ARTPPG) Department and inputs from the Institute of Secretariat Training and Management (ISTM), New Delhi.

I hope these manuals will be used extensively by the trainers and trainees and will help the officials become more knowledgeable, competent and productive at their work places.

I would like to convey my gratitude to all the renowned guest faculty and to all the individuals associated with the successful publication of the manuals for their inputs and support throughout the process of designing and printing these manuals.

A handwritten signature in blue ink, appearing to read 'Riju Gogoi', written in a cursive style.

Riju Gogoi  
Director of Training  
Assam Administrative Staff College

## Content

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**\*\*NOTE:** This is only a brief description about efile. For the complete manual kindly visit

<https://eoffice.assam.gov.in/efile-docs/UserManualeFile7.0.pdf>

## INTRODUCTION

eFile is a workflow based system that includes the features of existing manual handling of files with addition of more efficient electronic system. This system involves all stages, including the Diarisation of inward receipts, creation of files, movement of receipts and files and finally, the archival of records.

With this system, the movement of receipts and files becomes seamless and there is more transparency in the system since each and every action taken on a file is recorded electronically. This simplifies decision making, as all the required information is available at a single point.

## OBJECTIVE OF THE APPLICATION

The eOffice product pioneered by National Informatics Centre (NIC) aims to support governance by using in more effective and transparent inter and intra-government processes.eOffice is based on the Central Secretariat Manual of eOffice Procedure (CSeMOP), of the Department of Administrative Reforms & Training (DARPG), Govt. of India.

The need for transforming conventional government offices into more efficient and transparent, eliminating huge amounts of paperwork has long been felt. eFile, an integral part of eOffice suite is a system designed for the Government departments, PSU's, Autonomous bodies to enable 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 of files as well as receipts.

## NEED OF eFILE

Files and receipts are an important entity in any organization. There may be thousands of paper documents in the form of Files/Receipts being dealt in an organization on a daily basis. Keeping record of these paper documents, their movement and safety involves lots of time, money and effort which in turn decreases the efficiency and productivity of an organization.

Manual techniques for diarizing, moving and recording of Files/Letters, makes the tracking of those files/letters a very difficult task, thus delaying the work and decreasing efficiency. Due to the inefficiency of tracking with the manual system, there arose a need for a Computerized File Tracking System. What began with the development and implementation of the "File Tracking System" which was a major step towards Less Paper Office, NIC (National Informatics centre) always in forefront in the adoption of new enabling technologies in information and communication technology to meet the need of the organization/society, paved the path for the eOffice, a workflow based product enabling end to end electronic file movement across the government. It ensures proper distribution of work load, thus increasing the efficiency of

the system and bringing transparency to the system. The system simulates the manual system in a digital environment.

## KEY FEATURES

- Diarization of letters and file processing
- Data security with Digital Signature and eSign
- Scope based search
- Setting due date
- Reminders
- Notifications
- Follow up
- Dashboard
- Preference setting
- Monitoring and analysis through MIS Reports
- Interdepartmental file exchange

## OUTCOMES

- **Quick Decision Making and Faster Delivery of Services**
  1. Access of Files Any Where Any Time
  2. Movement of files in real time irrespective of geographical locations
  3. Delays removed because of transparency and accountability
- **Reduction in Corruption, Venal Practices and Red Tapism**
  1. Personal priorities/discretions eliminated because of transparency and accountability
  2. Deleting/replacing the noting or tearing of files etc cannot be even thought of
- **Accountability and Transparency**
  1. Tracking of the papers and files becomes very easy and quick.
  2. Pendency Monitoring
- **Environment Friendly and Go Green Initiative**
  1. Tonnes of papers are saved which in turn saves trees
  2. Infrastructure like Printers, Cartridges, Cupboards, Office Spaces are also saved
  3. Saving on Account of travel for transporting of files from one location to other



- **Always available Files never be lost and stored for perpetuity**

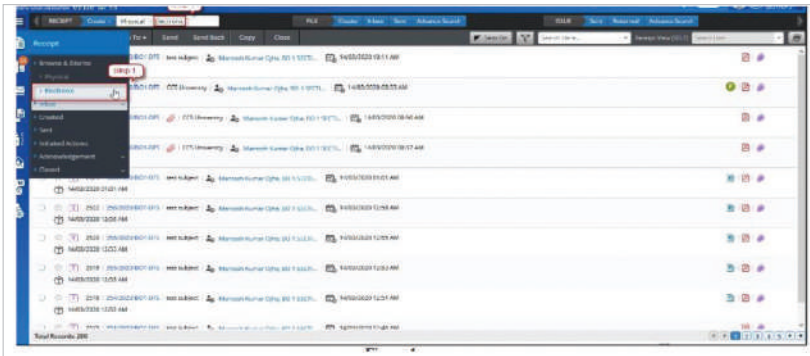
1. Natural Storms, Corona, floods but Government functioning is not at all impacted
2. Officials could work on their files seamlessly, in secured & safe manner from offices/homes

## RECEIPTS:

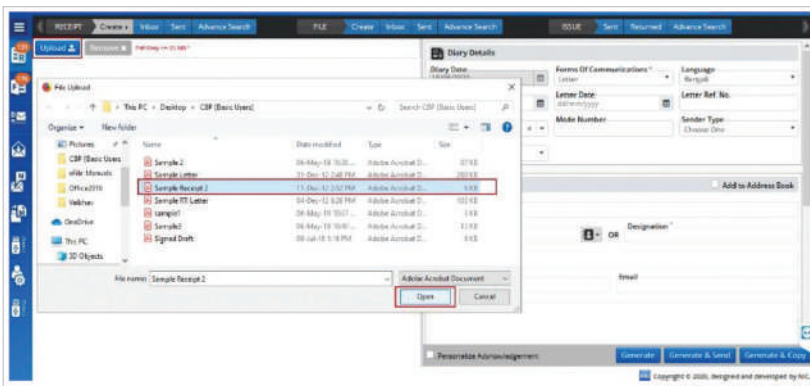
Once a DAK/Letter is diarized and a unique receipt/diary number is allotted then it becomes Receipt.

### STEPS TO FOLLOW:

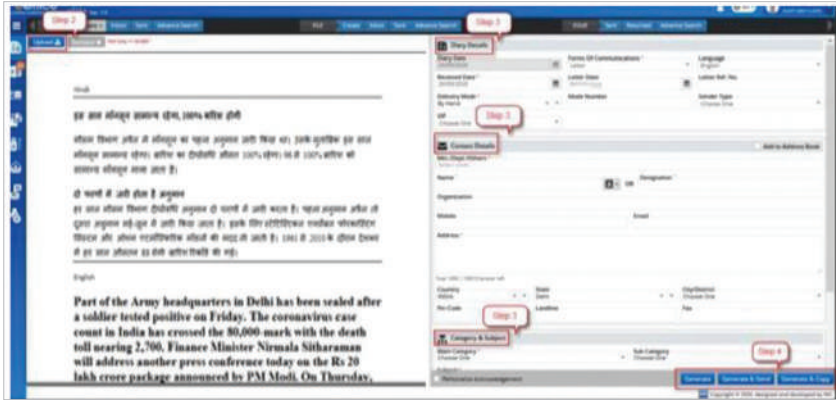
1. Click Electronic link under Browse & Diarize sub-module or Click Electronic under Create link in Quick Access Menu bar for Receipt.



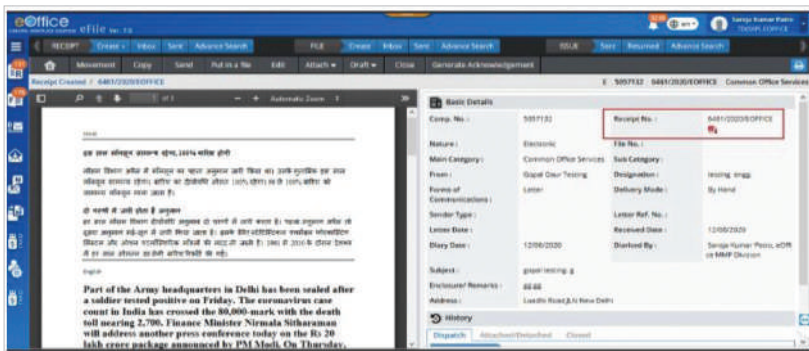
2. Click Upload button. The File Upload dialog box appears. Select the desired scanned PDF document (up to 20 MB) and click Open button.



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

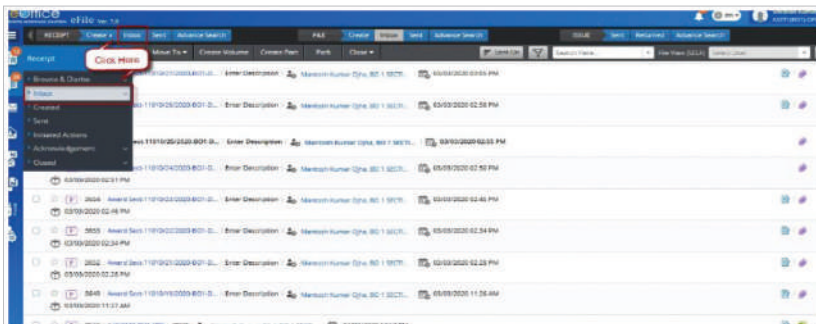


- Click Generate or Generate & Copy or Generate & Send to generate new electronic receipt with a unique Receipt No.



## 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.

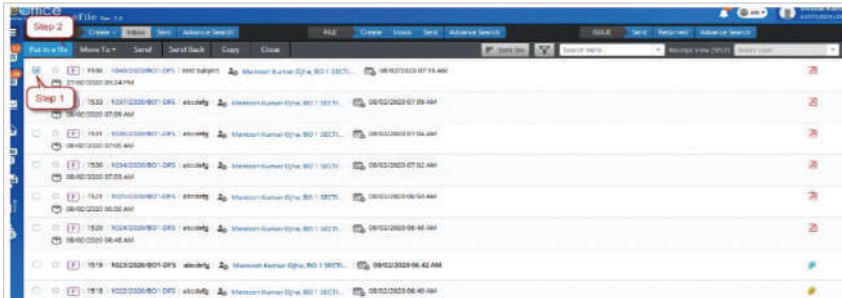


## PUT A RECEIPT INSIDE A FILE:

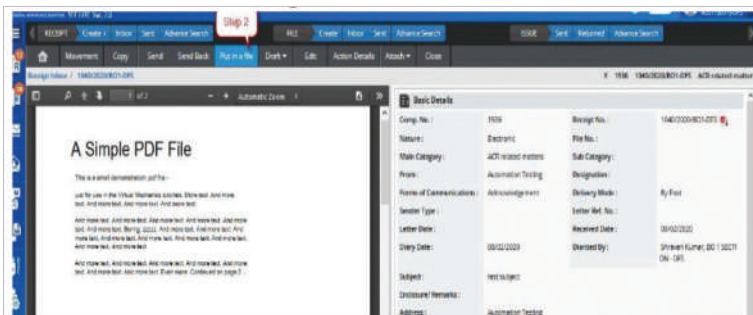
To record decisions on the note sheet against a receipt, it is necessary that the receipts may be put inside a file as correspondence. This section describes how to put up a receipt in a file.

### STEPS TO FOLLOW:

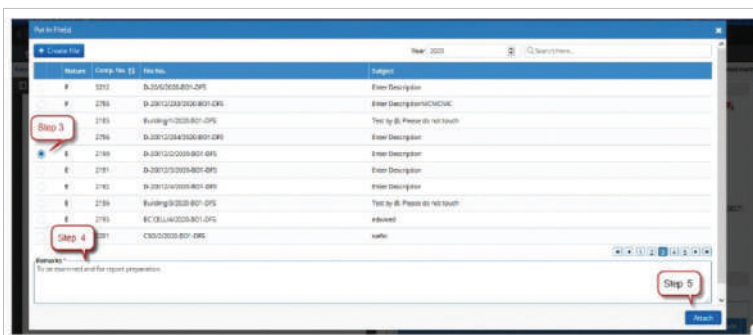
1. Select receipt or Click open receipt, from receipt Inbox or Created list.



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



3. Provide mandatory Remarks.
4. Click Attach as shown in Figure.



## FILE CREATION:

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

### STEPS TO FOLLOW:

1. Click “Create New” from the “File” module or “Create” link in Quick Access Menu bar to view File creation page.

2. Select Nature (Electronic) and File to be created.
3. Select the File-Heads from the available drop-down list under “File No”.
4. Enter Mandatory Description and provide other relevant details like Main Category, Sub-Category, Remarks, Previous References, Later References and Language.
5. Click “Continue working” to create a new file of selected Nature and Type.

### Created Files List:

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

File No.	Subject	Subject Category	Created On	Remarks
0335-801-DIFS	indiahead		18/03/2023 12:17 PM	
0335-801-DIFS	indiahead		18/03/2023 12:16 PM	
706204801-DIFS	common		18/03/2023 11:23 AM	
0335-801-DIFS	word		18/03/2023 10:46 AM	
8433-DIFS	word		18/03/2023 10:27 AM	
0335-801-DIFS	tyh		18/03/2023 10:18 AM	
8014-SFS	tyh		18/03/2023 10:17 AM	
0801-DIFS	rtg		17/03/2023 06:27 PM	
4813112005-801-DIFS	gltf		17/03/2023 04:55 PM	
8152026-801-DIFS	internom		17/03/2023 04:24 PM	

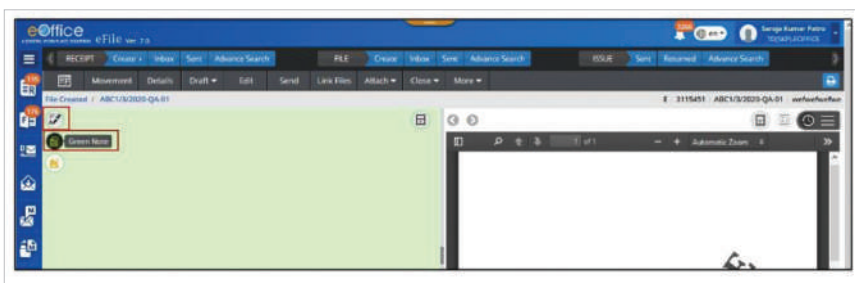
- ▶ Created List displays Files that are Created and not yet forwarded and created files forwarded to recipient but pulled back later.
- ▶ Fields like Nature of File, Computer No., File Number, Subject, Subject Category, Created On and Remarks are displayed.
- ▶ Actions like Send, Create Volume (For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

Comp. No. 11	File No.	Subject	Subject Category	Created On	Remarks
E-4224	11-F1023209-821-Q95	interview		17/09/2020 11:00 AM	
F-4221	11-F1023209-821-Q95	interview		17/09/2020 10:20 AM	
F-4236	11-F1023209-821-Q95	interview		17/09/2020 09:37 AM	
F-4228	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 18 AM	Automation Testing Remarks
F-4228	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 16 AM	Automation Testing Remarks
F-4227	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 15 AM	Automation Testing Remarks
F-4228	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 15 AM	Automation Testing Remarks
F-4228	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 12 AM	Automation Testing Remarks
F-4228	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 10 AM	Automation Testing Remarks
F-4228	11-F1023209-821-Q95	Automation Testing	ACP and other related matters	17/09/2020 08 08 AM	Automation Testing Remarks

## ADD GREEN NOTE:

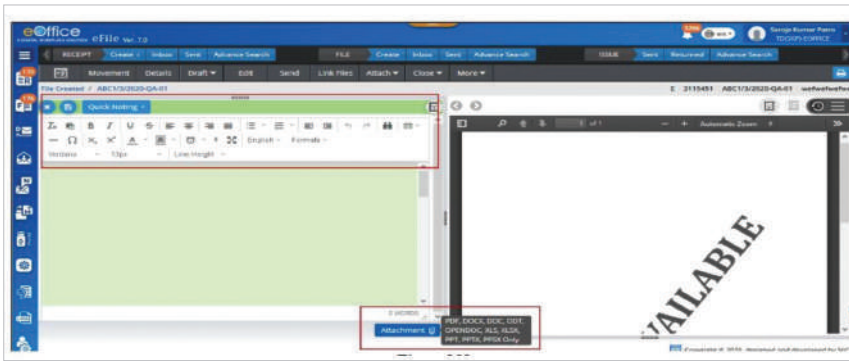
### STEPS TO FOLLOW:

1. Click 'Add Note' icon to expand and then click 'Green Note' Icon in noting panel of electronicfile 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).



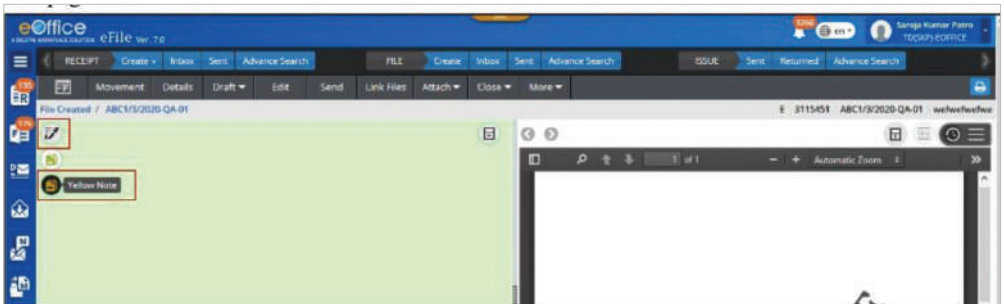


3. Click Attachment icon to attach document (PDF, DOCX, DOC, ODT, XLS, XLSX, PPT, PPTX, PPSX format) if require as shown in the above figure.
4. Click Save icon to finalize the Green note.
5. Edit the content either by typing or pasting copied data (text, table, hyperlink and image) or inserting table by using editor toolbar to make changes in the existing note.

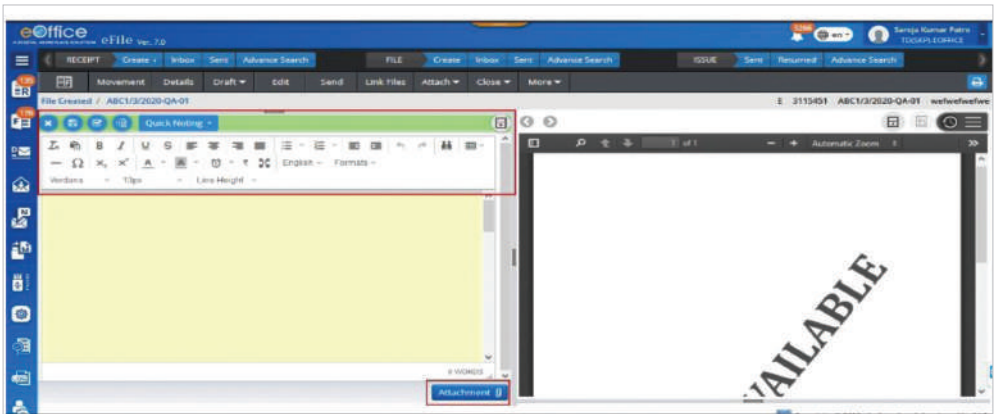
## ADD YELLOW NOTE

### STEPS TO FOLLOW:

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



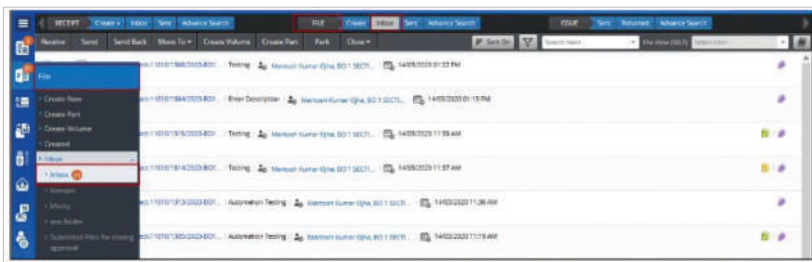
2. Enter either text by typing or paste copied data (text, hyperlink and image) in the web editor or inserts table (using editor toolbar)



3. Click Attachment icon to attach document (PDF, DOCX, DOC, ODT, OPENDOC, XLS, XLSX, PPT, PPTX, PPSX format) if required.
4. Click Save icon to finalize the Green note.

### FILE INBOX:

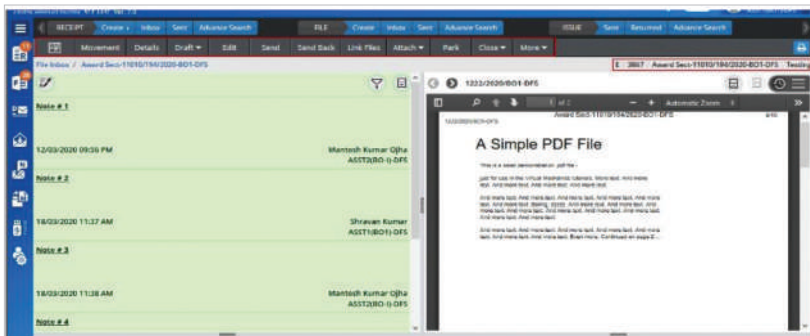
The File Inbox is the list of Files submitted/marked to a user. The Files in Inbox are in active state pending for the user's necessary action for its disposal. User can click on Inbox sub module under File module or Inbox Quick Access menu of File in the Home Page to view Inbox List



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

## ELECTRONIC FILE INNER PAGE:

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

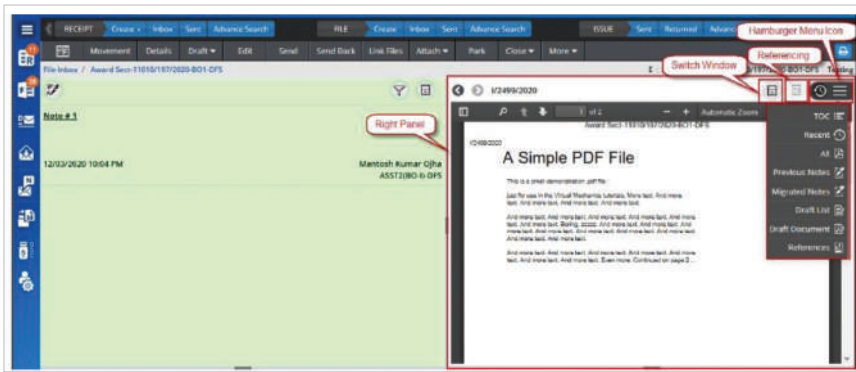


### Actions on File Inner Page

#### *Actions on Menu Bar*

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

- **Park:** Clicking on Park Menu of file will open popup to move File to Parked Folder.
- **Close:** Clicking on submenu (Close/ Send for Approval) of Close will open popup to take necessary action.
- **More:** Clicking More action menu will display following menus in drop-down.
- **Action Detail:** Clicking Action Detail will open Initiated Action detail Page.
- **Create Part:** Clicking on Create Part will open Part File creation page.
- **Merge:** Clicking on Merge will display Merge File and Merge Detail sub menu.
  - Merge File sub menu will be inactive for Electronic File.
  - Merge Detail will open details of merged File.



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

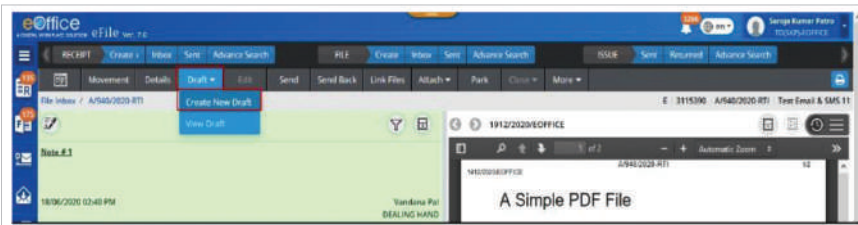
- **Draft Document:** Clicking on Draft document menu icon will display latest draft. version
- **References:** Clicking in Reference menu icon will display list of all attached local References.

## CREATE DRAFT (DFA) IN AN ELECTRONIC FILE:

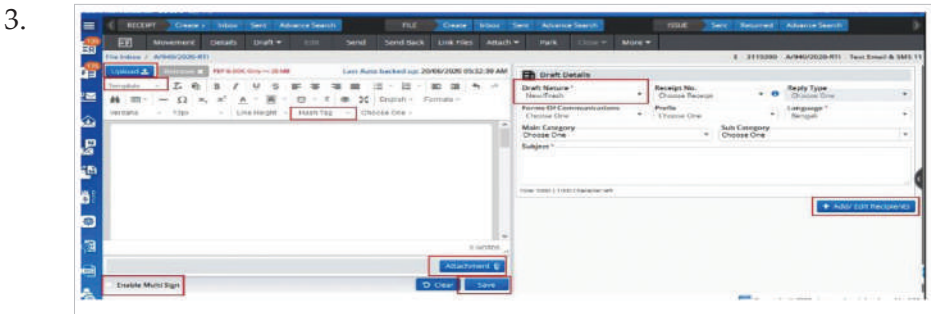
Draft for approval (DFA) can be created in a standalone Electronic File (Not Attached with any other File/Receipt) available in Inbox/Inbox folder/ Created/Parking list.

### Steps to Follow:

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



2. Select from pre-defined draft template or Upload a file (PDF or Word Document Only up to 25 MB) or type or paste copied content in the text area to create draft content.



4. Add Hash Tag if required (If draft created using Text Editor or Template)
5. Add Attachment if any.
6. Check Enable Multi Sign checkbox. (If draft needs to be signed by multiple signing authority)
7. Fill basic metadata categorized under Draft Details.
8. Click Add/Edit Recipients (Optional at time of Draft Creation) action button.
9. Click Save to Save the draft and generate unique draft number.

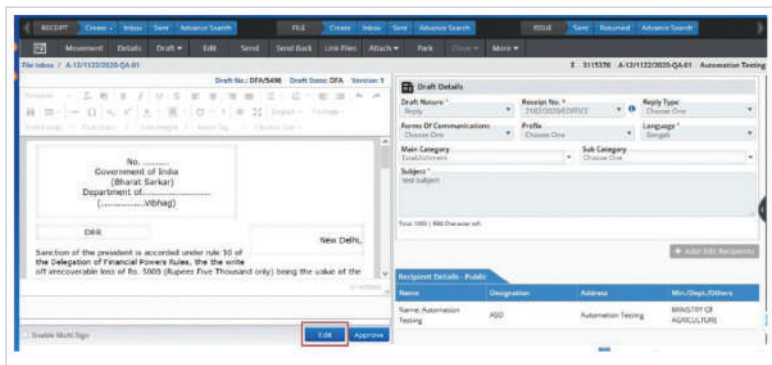


## EDIT DRAFT (DFA):

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

### STEPS TO FOLLOW:

1. Click View Draft submenu of Draft menu from file inner page menu bar or Draft List Dropdown menu on Right panel of File Inner Page to view List of all created Drafts.
2. Open unapproved draft from Draft List by clicking on Draft No.
3. Click Edit Button.
- 4.



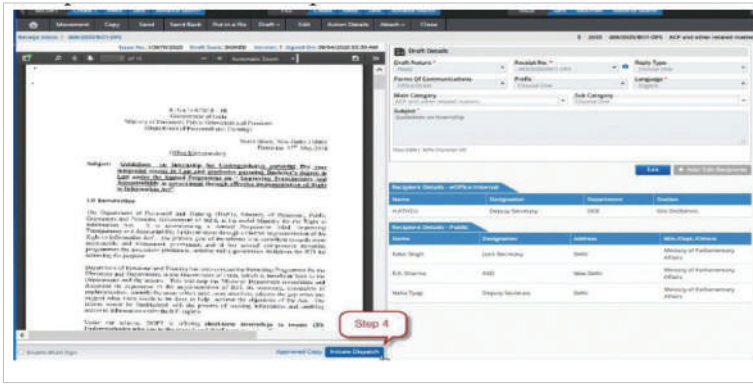
5. In Case of DFA created using DFA Editor or Template, Saved content of the draft should be displayed in editable form. In Case of DFA created using uploading, Download uploaded Word document by clicking Download Icon for further editing and click on update to save the edited content of the draft.

## DISPATCH FROM FILE:

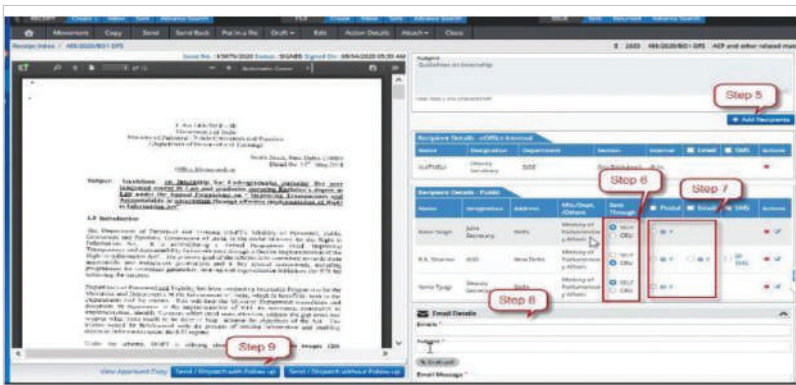
This feature allows User to Dispatch Signed Draft (Issue) letters through Self or CRU.

### STEPS TO FOLLOW:

1. Click the signed draft no. from the 'List of Drafts' required to dispatch.
2. Click 'Initiate Dispatch' to initiate the Dispatch Process.



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



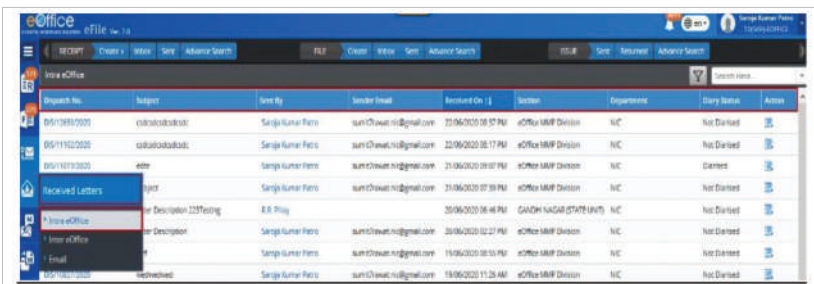
- Click Send/Dispatch without follow-up.

### INTRA eOffice RECEIVED LETTERS:

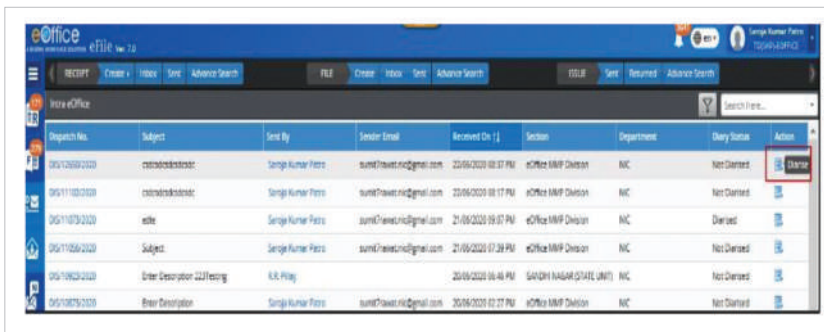
This feature allows user to view and diaries letters received from Intra eOffice (Department within same eFileInstance) as a Receipt in eFile Module.

### STEPS TO FOLLOW

- Click Intra eOffice link under 'Received Letters' module.



2. Click Diarise Icon for dispatch in the Intra eOffice Received Letters list.



3. Move dispatch content, PDF attachment and Uploaded document for merging into a single document (PDF) and click on diarize or diarize separately as required.
4. Click Preview to view and verify the merged PDF.
5. Click Diarize to open electronic receipt Diarisation page. (PDF will be auto populated)
6. Follow the diary process as mentioned in Electronic Receipt Diarisation to create electronic receipt.

**NOTE:**

For complete manual kindly refer to-

<https://eoffice.assam.gov.in/efile-docs/UserManualeFile7.0.pdf>

