File

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

Create a new File

STEPS TO FOLLOW:

1. Click "**Create New**" from the "File" module or "**Create**" link in Quick Access Menu bar to view file creation page. (**Figure 172**)

2. Select **Nature** (Electronic/Physical) and **Type** (Non SFS/SFS) of 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.

Figure 172

> **Note:**
> - Creation of File depends upon **Role Assigned to User**
> - Selection of **Nature** and **Type** of File is **Configuration Based**

IMPORTANT POINTS:

- **Non SFS -** User must select the available file heads for the nomenclature of File.

- **SFS -**User can enter File No. without any restriction or standards

- **File No.** once generated cannot be edited however other metadata can be edited any time by the users of Dealing Section of File.

- **Created Files** can be viewed from Created Sub module of File Module.

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** link under file module to view Created File listing. (**Figure 173**)

Figure 173

- Created List displays Files that are Created (Electronic/Physical) and not yet forwarded and created files forwarded to recipient but pulled back later.

- Fields like Nature of File (E/P), 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**. (**Figure 174**)

Figure 174

- Using context menu (on mouse right click) created files can be opened in same or different tabs of browser and can be sent (**Figure 175**).

Figure 175

- Files can be searched using Module Search (Computer No., File No., Subject, Subject Category and Remarks. (**Figure 176**)

Figure 176

- Created File list of Self, Section User and User under individual post hierarchy can be viewed through **File view** (**Figure 177**).
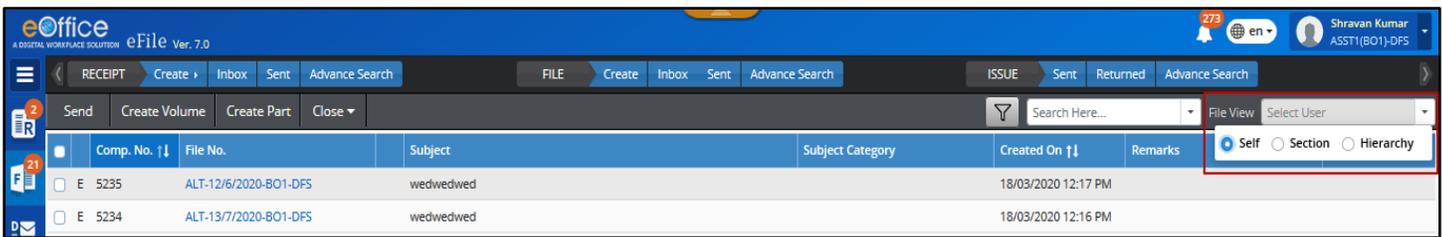
Figure 177

> **Note:**
> - Created list of Section User and User under Individual Post Hierarchy can only be viewed. File need to be pulled up, to view inner page and take various actions.

- Clickable Attachment Icon will be displayed next to File no. in case of File having an attached File/Receipt. (**Figure 178**)

Figure 178

> **Note:**
> - Clicking on Attachment Icon will display list of attached File/Receipts in a Popup window.

- Created File list can be **filtered** depending on **Nature**, **Subject Category** and **Creation Date** by clicking Filter Icon in menu bar. (**Figure 179**)

Figure 179

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

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 clicks on **Inbox** sub module under **File** module or **Inbox** Quick Access menu of File in the Home Page to view Inbox List.
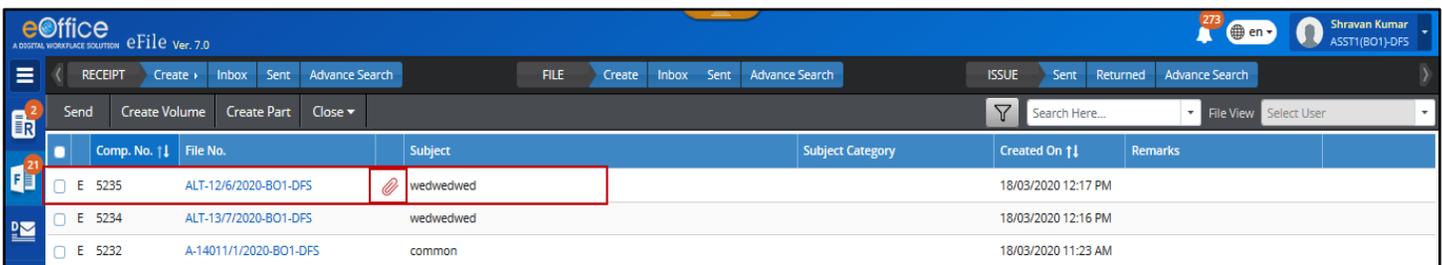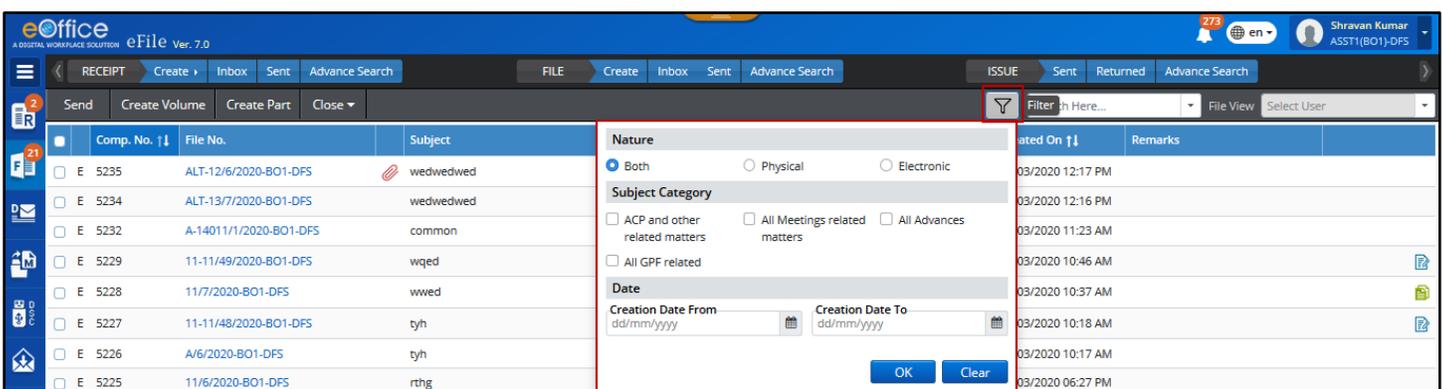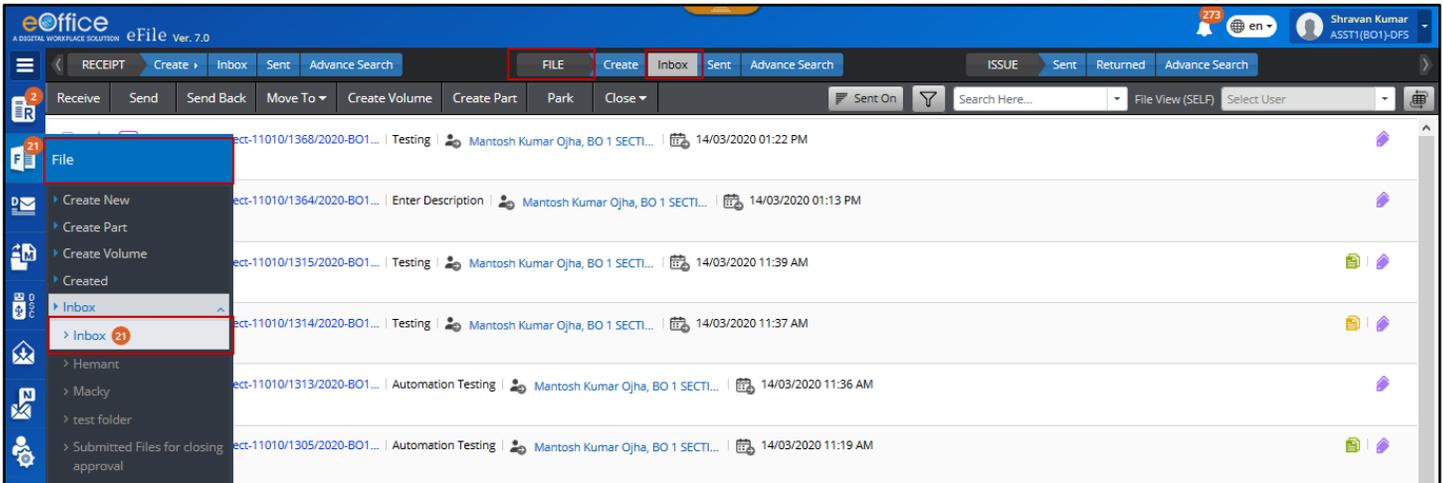

Figure 180

- 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** (Send For Approval) can be taken.

- Inbox View can be switched from Advance (Row based) to Normal (Column Based) by clicking on switch icon. (**Figure 181**)
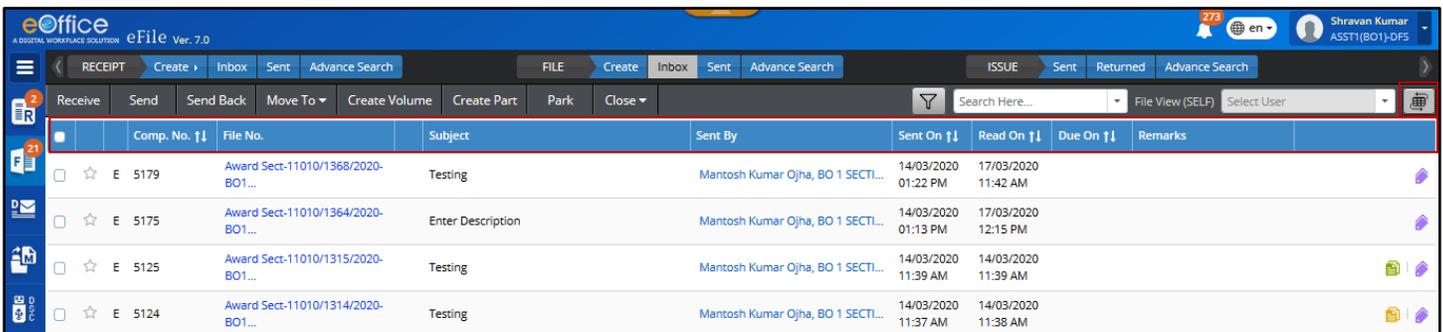
Figure 181

> **Note:**
> ▪ To configure the default view for Inbox List Refer Preferences sub module of Setting Module.

- File inner page can be viewed by clicking on **File Number**.

- **Sent By** user details (Name, Designation, Marking Abbreviation, Post, Section, Department, Email and Instance) can be viewed by clicking on user's name. (**Figure 182**)
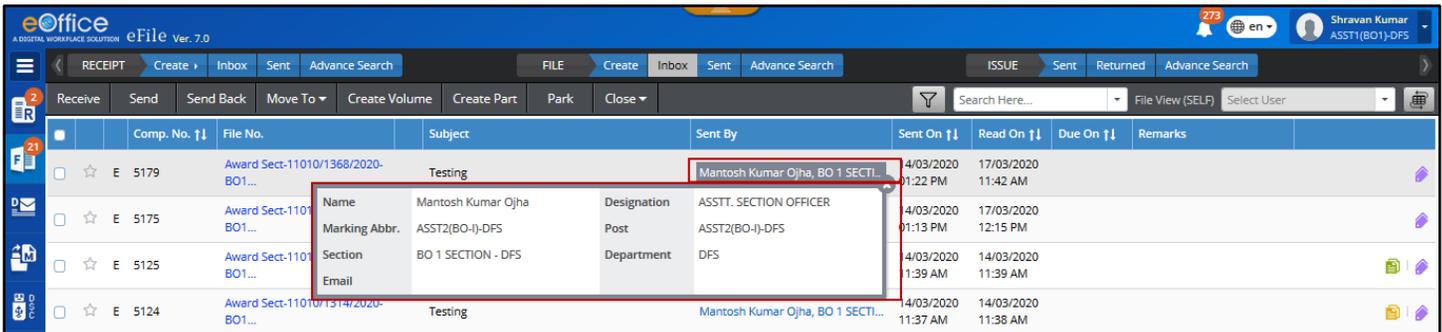
Figure 182

- List of Files can be sorted based on Computer No., Sent On and Due On. (**Figure 183**)

Figure 183

- Files can be searched using Module Search (Computer No., File No., Subject, Sent By and Remarks). (**Figure 184**)

Figure 184

- Using context menu (on mouse right click) Inbox files can be **Received** (Unreceived physical file only),**Opened in Same or Different Tab** of browser and can be **Send** or **Send Back**. (**Figure 185**)
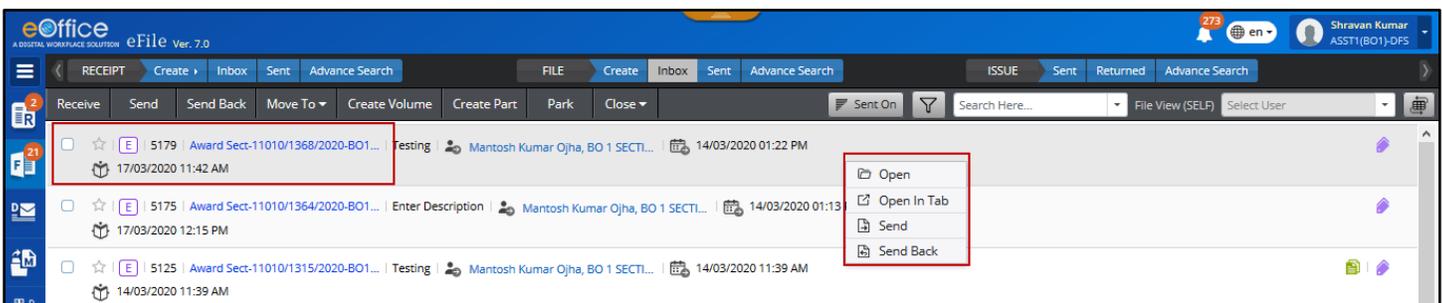
Figure 185

- Inbox file list of Self, Section User and User under individual post hierarchy can be viewed through **File view**. (**Figure 186**)
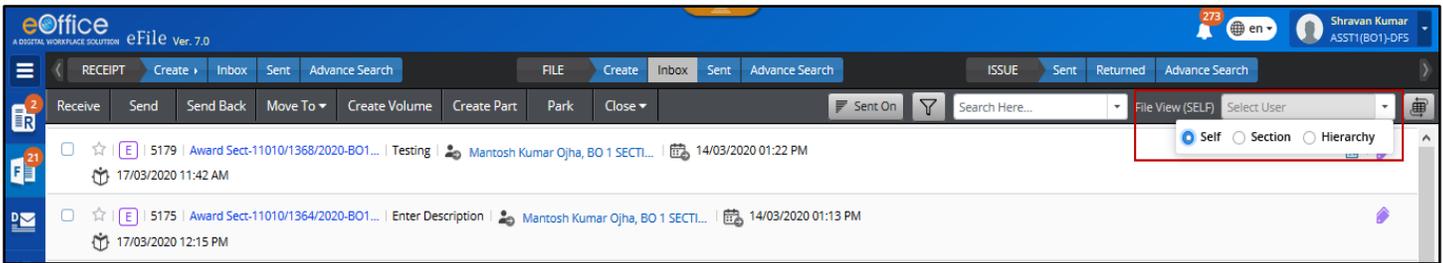
Figure 186

> **Note:**
> - Inbox list of Section User and User under Individual Post Hierarchy can only be viewed. File need to be pulled up, to view inner page and take various actions.

- Clickable Attachment Icon will be displayed next to file no. in case of file having an attached File/Receipt. (**Figure 187**)
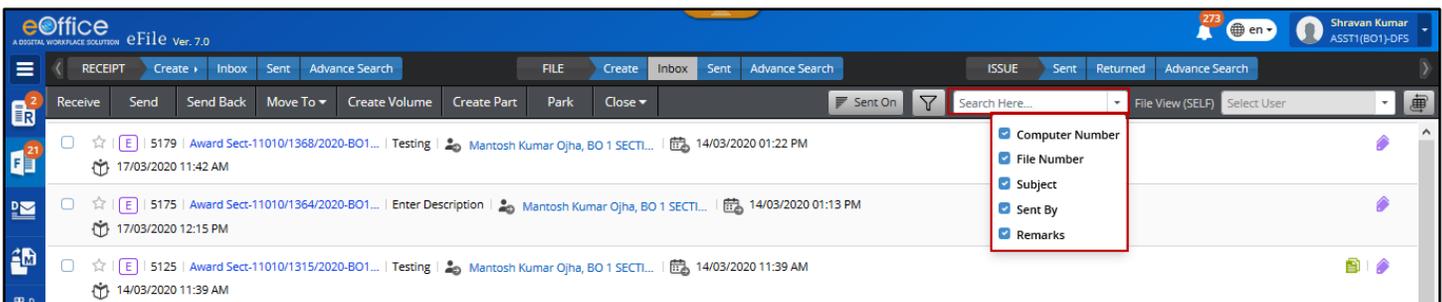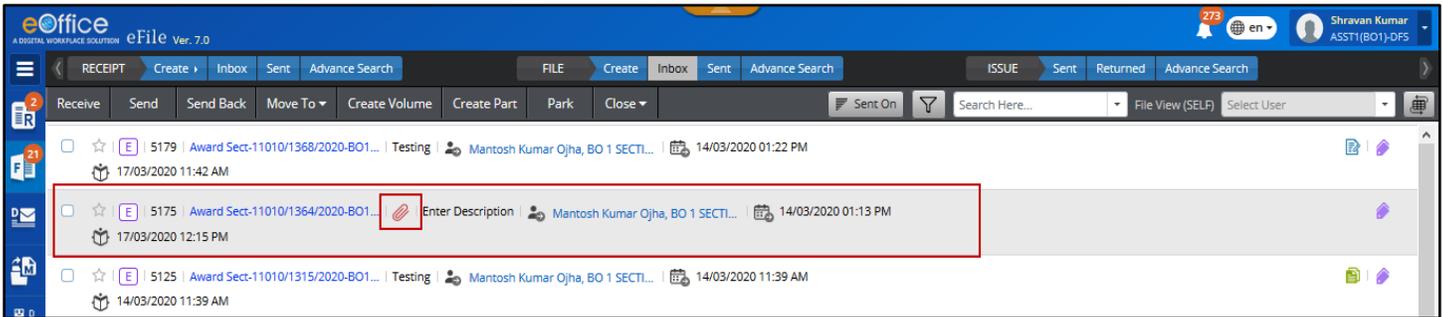

Figure 187

> **Note:**
> - Clicking on Attachment Icon will display list of attached File/Receipts in a Popup window.

- Inbox File List can be **filtered** depending on **Nature**, **Priority**, **SubjectCategory** and **Sent Date**, **Due Date**, etc. by clicking Filter Icon in menu bar. (**Figure 188**)
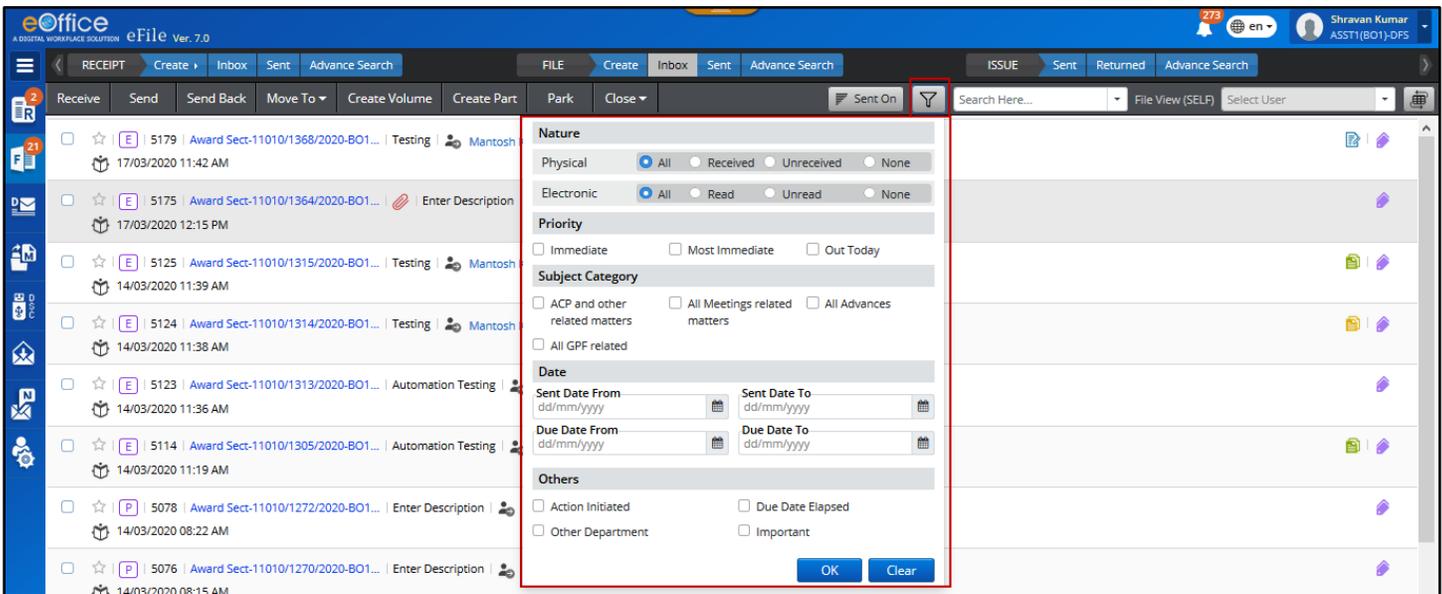
Figure 188

- Legends and Color Code will be used to differentiate various file in list.

Move File to Folder of Inbox

User can manage Inbox Files by moving selected Files to Self-created Folders in File Inbox.

STEPS TO FOLLOW:

1. Select Files from Inbox or Folder of Inbox.

2. Click destination Folder from dropdown list of My Folders under Move to menu. (**Figure 189**)
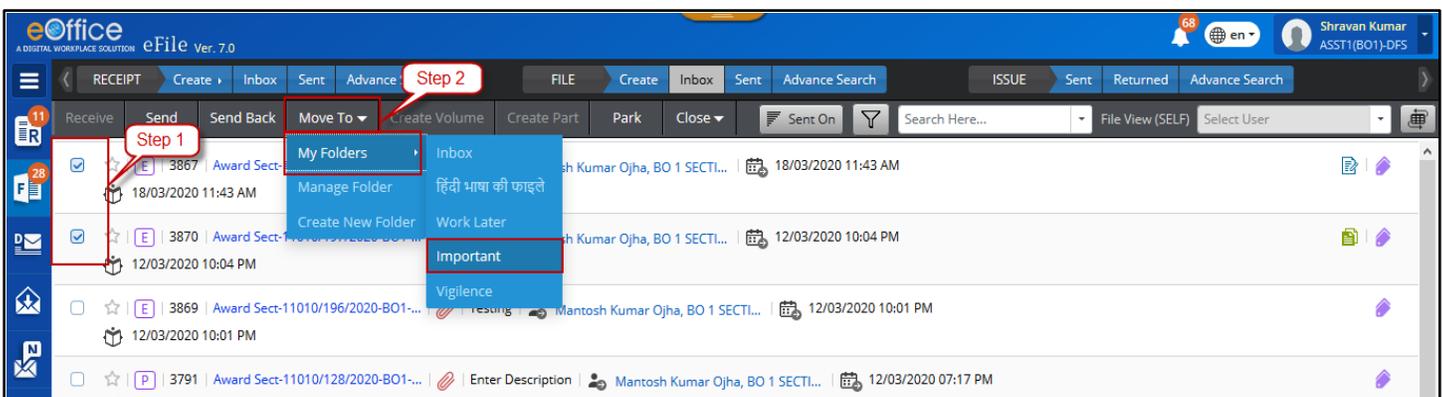
Figure 189

Note:

- For Editing Folder Name and Deleting Folders Refer Folder Management.

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. (**Figure 190**)

Electronic File Inner page can be opened by clicking on File no. link from various list pages viz. Inbox/Inbox Folder/Created/Parked Folder.
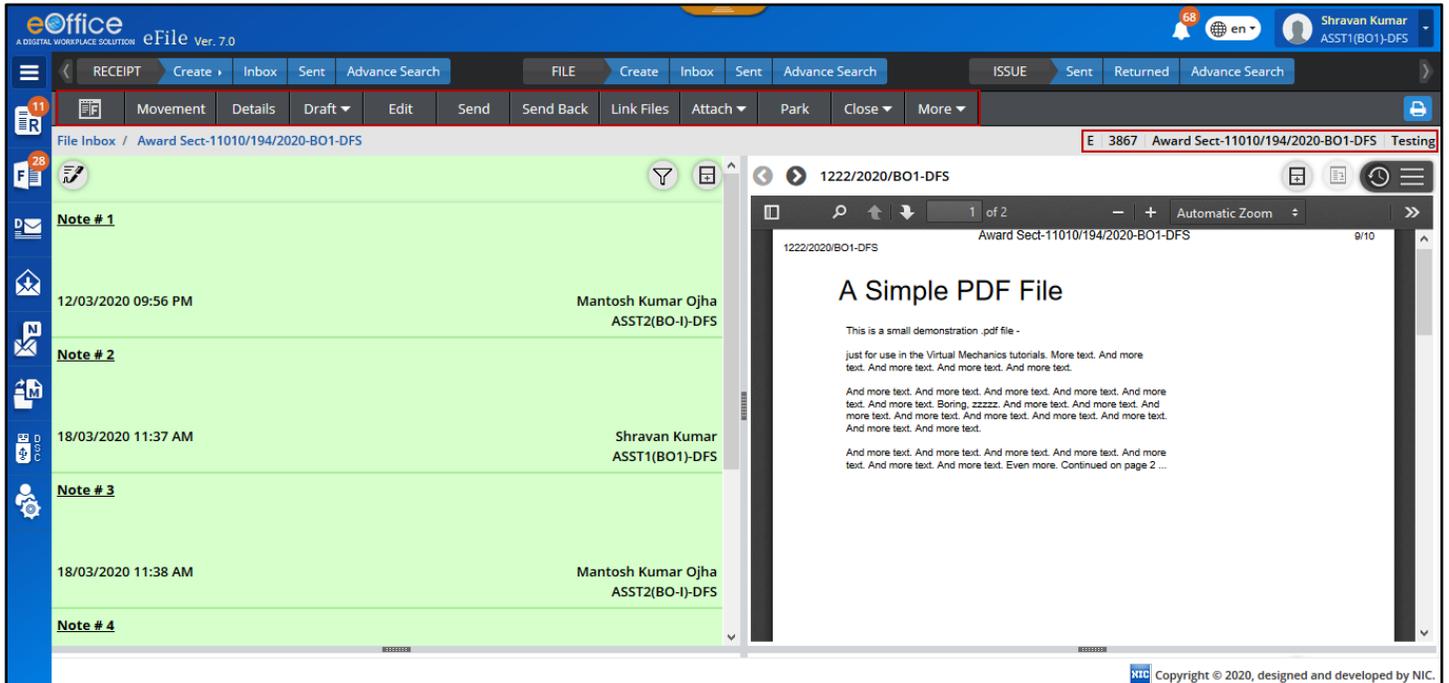
Figure 190

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.

  o Clicking **Create new** sub menu of **Draft,** will open Draft editor page.

  o 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.

- **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.

Note:

- Menus/Action Buttons which are not applicable in currently opened file will remain Inactive.
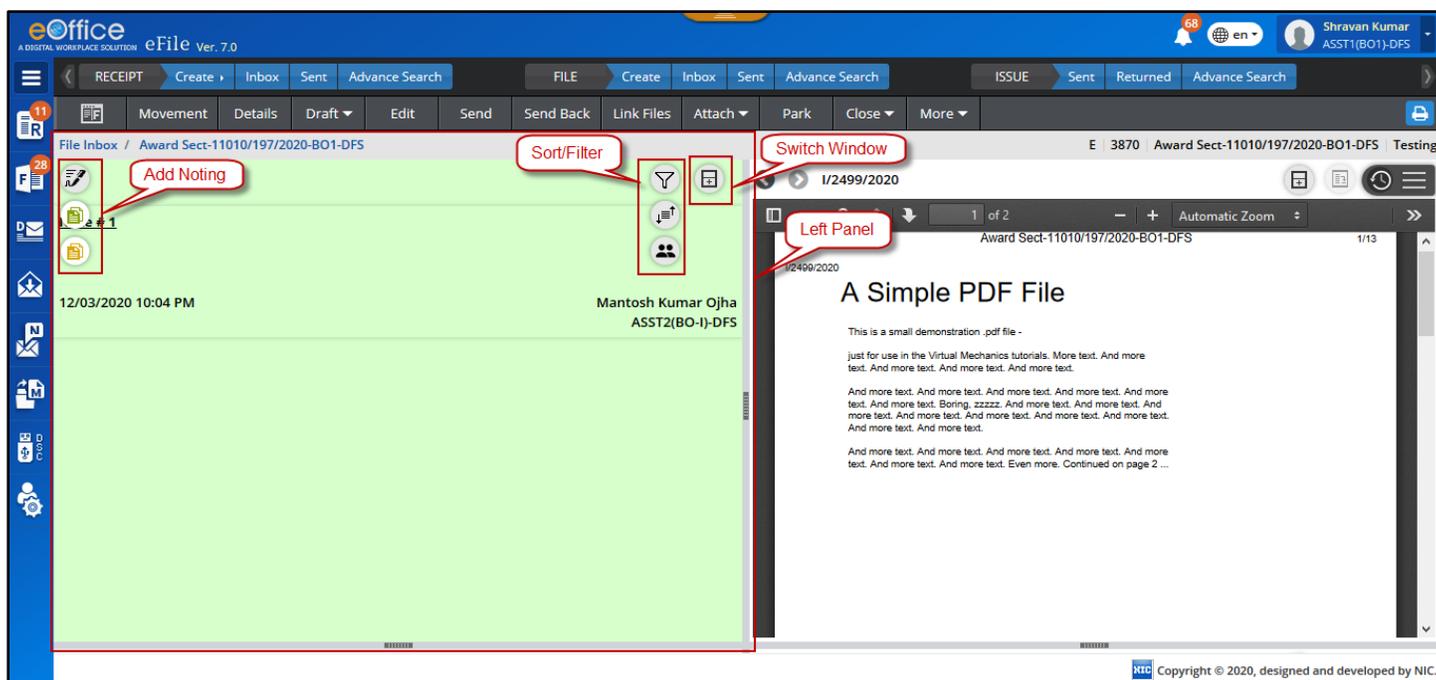

Actions on Left Panel (Noting Panel)

Figure 191

- **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.
- **Switch View:** Clicking on Switch View Icon switches the view of Noting Panel to Split view panel.
- **Sort/Filter Note:** Clicking in Sort/Filter note Icon display icon to Sort by ASC/DESC and Sort By Post.
  - **Sort by ASC/DESC:** Clicking on Icon will sort noting by Note no., in Ascending or Descending order.
  - **Sort by Post:** Clicking on Icon will display post of all users mentioned in Green Note and selecting one of them will display noting of selected post.
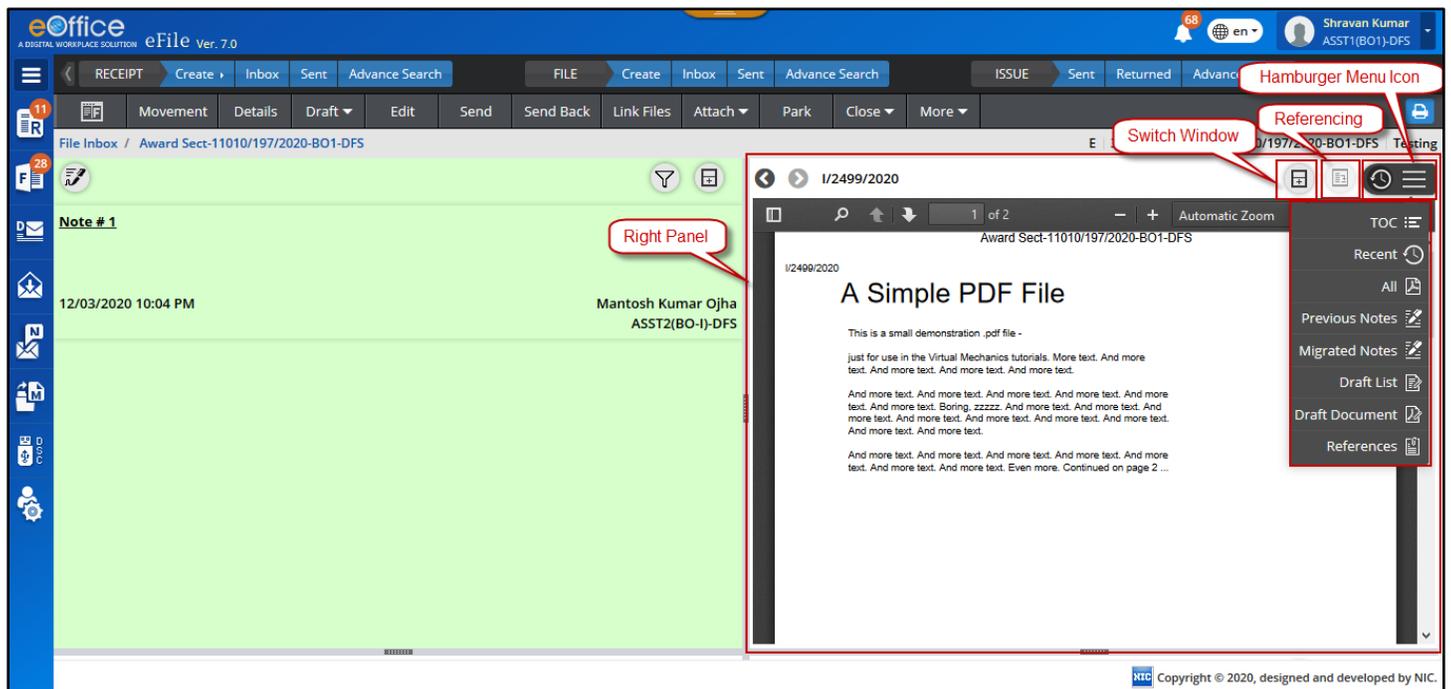
Actions on Right Panel

Figure 192

- **Switch View:** Clicking on Switch Window Icon switches view of Correspondence Panel to Split view panel.
- **Referencing Icon:** Clicking on Reference Icon will provide option to refer previous note or attached correspondence in Green or Yellow note in file.

Note:

Referencing Icon will be active only on selection of text in Green/Yellow Note Editor and only if Correspondence or Previous Noting is available in File.

- **Action Menu dropdown list (Hamburger menu Icon):** Clicking on Action Menu dropdown list will display dropdown list of menus (TOC, Recent, All, Previous Noting, Migrated Noting, Draft List, Draft Document and References)

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

> **Note:**
>
> Migrated Noting menu will be visible only for Migrated File having migrated Green Note.

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

Physical File Inner Page

Physical File Inner pages displays Nature of File, Computer No., File No., Subject, Correspondence panel and various menus to work on file.

Physical File Inner page can be opened by clicking on File no. link from various list pages viz. Inbox/Inbox Folder/Created/Parked Folder.

Figure 193

Actions on File Inner Page

- **File Home Page:** Clicking **File homepage Icon** will display 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.

- **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.

- **Convert:** Clicking **Convert** will open File conversion page to convert physical file to Electronic File

- **Link:** Clicking Link Menu will open **Linked Files** List with option to Link Files.

- **Attach:** Clicking sub menu **Attach File/Attach Receipt** of **Attach File** menu will open File/Receipt Attachment Page.

- **Park:** Clicking **Park** Menu of file will open popup to move File to Parked Folder.

- **Close:** Clicking submenu (**Close/ Send for Approval**) of Close will open popup to take necessary action.

- **Dispatch:** Clicking **Dispatch** will open dispatch page of File.

- **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.

  - **Create Volume:** Clicking on Create Volume will open File Volume creation Page.

  - **Merge:** Clicking on **Merge** will display **Merge File** and **Merge Detail** sub menu.

    - **Merge File** sub menu will open File Merging Page with option to select physical files and merge.

    - **Merge Detail** will open details of merged File with option to Demerge or Merge with another.

- **Print/Download:** Clicking on **Download** will display a Print/Download page to View or Download Complete/Customized File, Correspondences, Local Reference, Movement History and Action Detail.
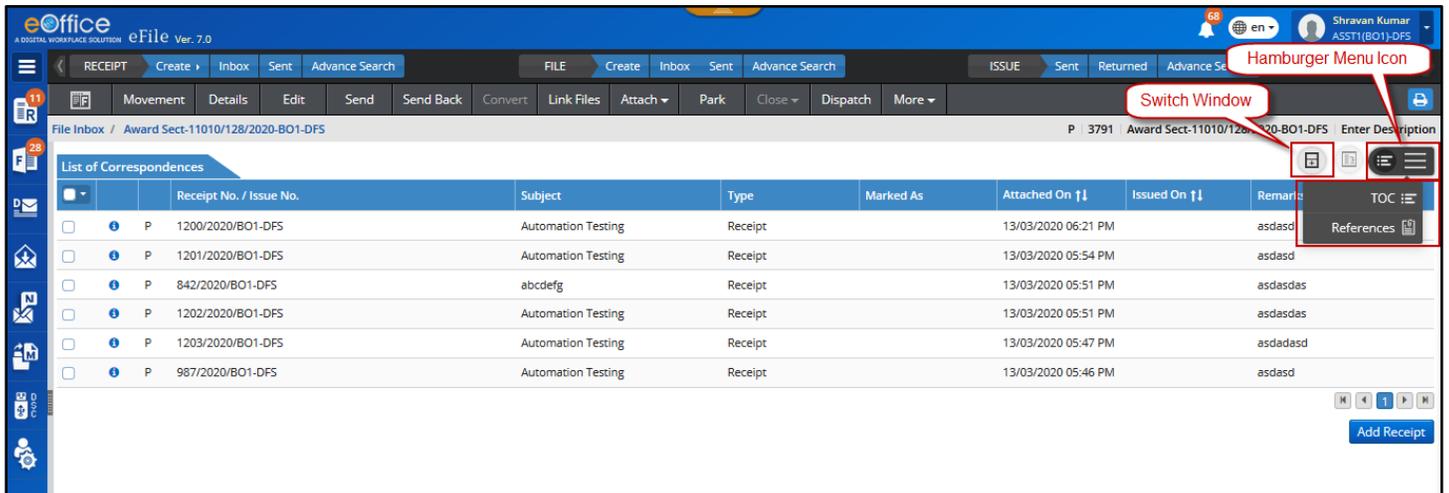
Actions on Correspondence Panel

Figure 194

- **Switch View:** Clicking **Switch Window Icon** switches view of Correspondence Panel to Split view panel.
- **Action Menu dropdown list (Hamburger menu Icon):** Clicking Action Menu dropdown list will display dropdown list of menus (TOC and References)
  - **ToC (Correspondence List):** Clicking ToC menu icon will open List of Correspondence attached within a File.
  - **References:** Clicking in Reference menu icon will display list of all attached local References.