Closing of File

This Feature allows user to **Close** the File, if actions on File are completed. User will be able to Reopen closed file whenever required.

Direct Closing of File

This feature is Role Based. User with **Role Closing** and **Role Approver** can directly Close the File from Inbox/Inbox Folder/Created List.

Important Points:

✓ File must be in Inbox/Inbox Folder/Created List.
✓ File must be of same dealing section (that of logged in user) for direct closing.
✓ Physical Files must be in received state.
✓ Inbox files to be closed must not have any File/Receipt as attachment.
✓ Inbox files to be closed must not be received from another eFile instance.

STEPS TO FOLLOW:

1. Select files in file Inbox /Inbox Folders/Created listing and click Close menu or Click open a File from Inbox /Inbox Folders/Created listing and click Close menu.
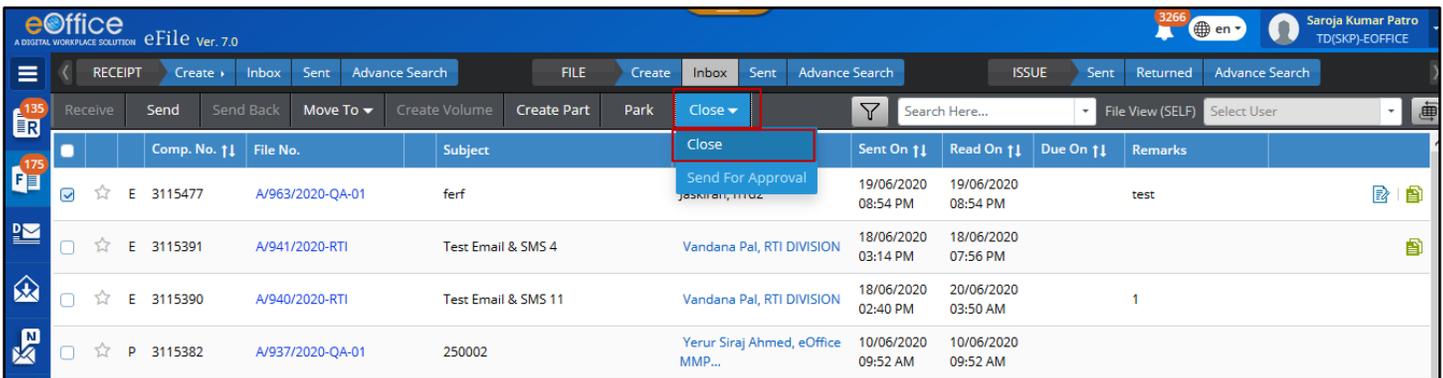

Figure 305

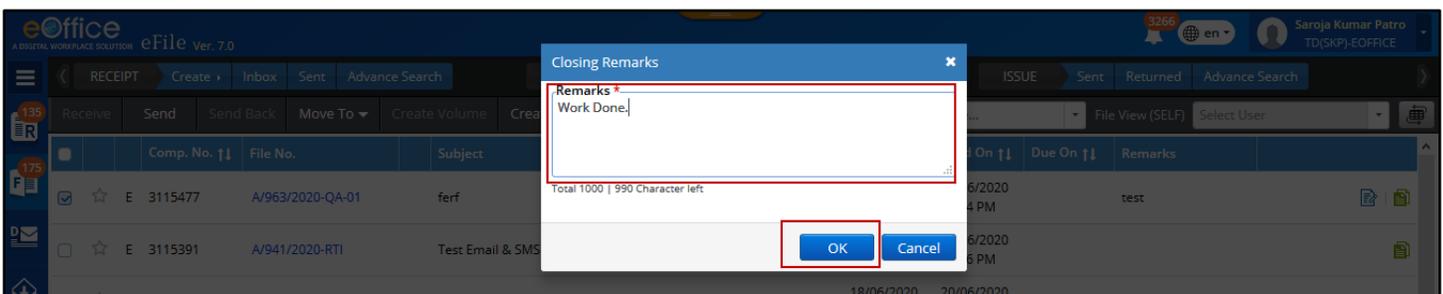2. Enter **Closing Remarks** in the file closing confirmation pop up window.

Figure 306

3. Click **OK** button to Close the File.

Note:

- Closed File will be removed from Inbox /Inbox Folders/Created list.
- Closed File will be displayed under **Closed (By Me)** list of Files module.
- All the receipts inside the file (as correspondence) will be closed.
- State of the file should be changed to CLOSED.
- Entry of Action, Action By, Action On, Action Remarks values should be displayed in File Closing History.
- No action will be allowed on the file once closed except viewing details of the file, and option to Re-Open the closed file from Closed (By Me) list.
- User will have the option to Record closed physical file from Closed (By Me) list (Configurable feature).

Send File for Closing Approval

User having only Role Closing can send File for Closing Approval. Once approval is granted user can close the File from Submitted File for closing approval list.

Important Points:

- ✓ File must be in Inbox/Inbox Folder.
- ✓ Files in Created Folder can be directly closed without any Approval.
- ✓ File must be of same dealing section (that of logged in user).
- ✓ Physical Files must be in received state.
- ✓ Inbox files to be closed must not have any File/Receipt as attachment.
- ✓ Inbox files to be closed must not be received from another eFile instance.

STEPS TO FOLLOW:

1. Select files in file Inbox /Inbox Folders/Created listing and click **Send For Approval** submenu under Close menu or Click open a File from Inbox /Inbox Folders/Created listing and click **Send For Approval** submenu under Close menu.
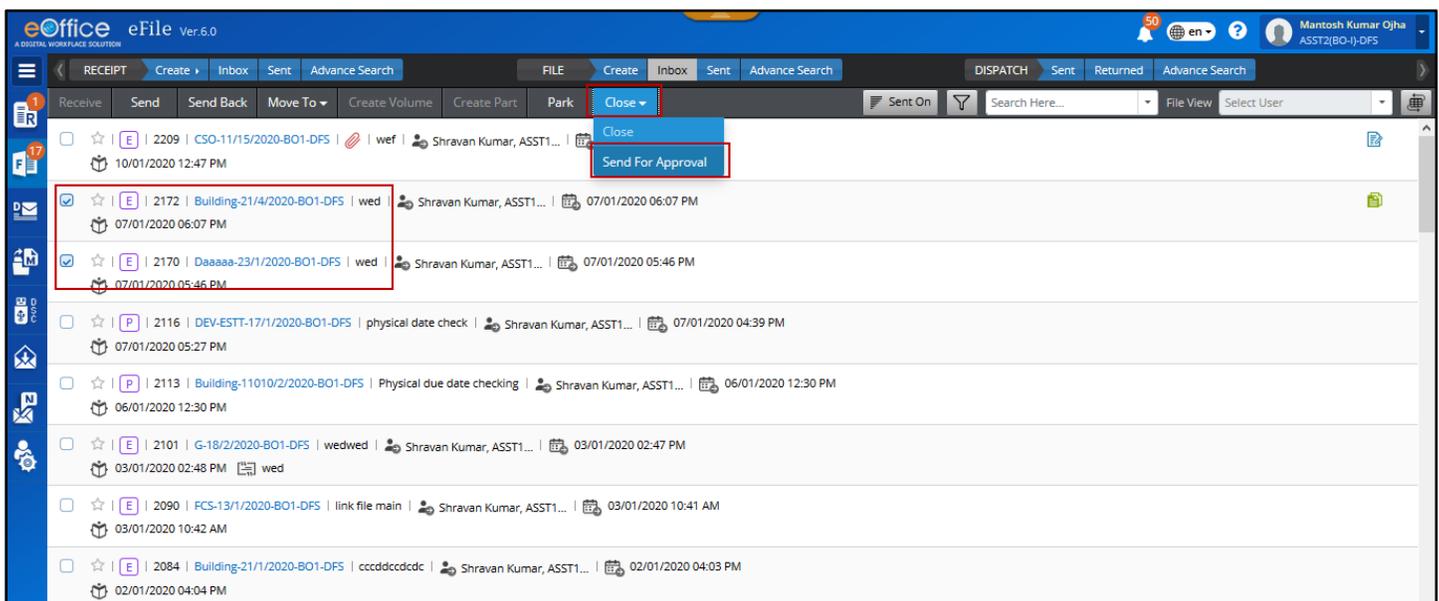

Figure 307

2. Enter approval-seeking remarks in the 'Send File for Approval' pop up window

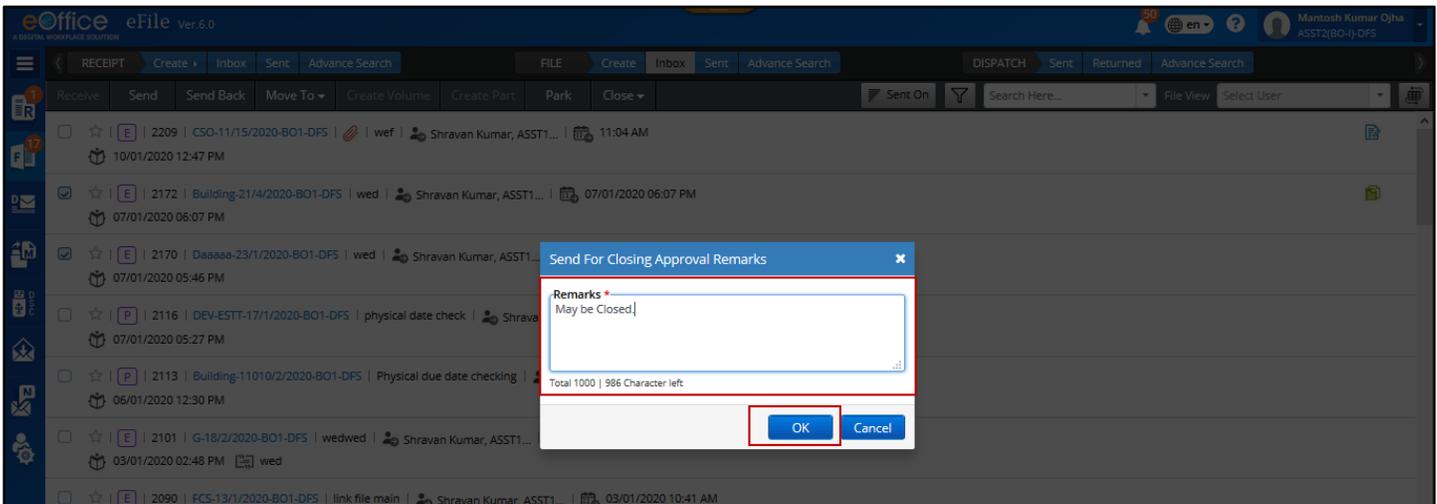3. Click **Send** button to Send Close Approval.

Figure 308

> **Note:**
> - File will be removed from inbox/inbox folder list and is displayed under Submitted Files for Closing Approval module with pending status.
> - User will be able to take actions like 'Close', 'Move to Inbox', 'Cancel' for Approved, Rejected and Pending approval status respectively.
> - User will be able to view list of approvers for that particular file by clicking on 'View Approvers' link.

Bulk Closing of File

This Feature allows user to Close Files in Bulk. User with Role Closing and Role Approver can Directly Close the File while User with only Role Closing can Send File for Closing Approval.

> **Important Points:**
> - ✓ Bulk Closing List will display Files in Inbox/Inbox Folder/Created list of Same Dealing section as of logged in User.
> - ✓ Physical Files must be in received state.
> - ✓ Inbox files to be closed must not have any File/Receipt as attachment.
> - ✓ Inbox files to be closed must not be received from another eFile instance.

STEPS TO FOLLOW:

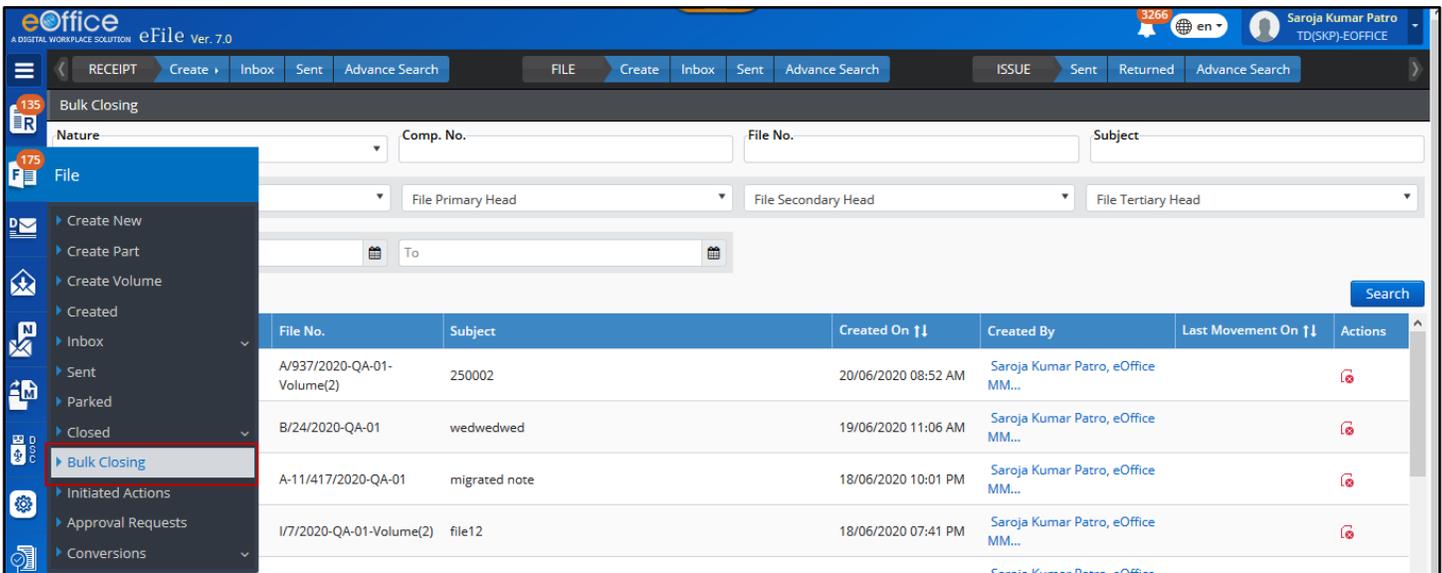1. Click **Bulk Closing** link under Files module.

Figure 309

2. Search File using various search parameters. (*If Required*)

3. Select Files and Click **Close** Icon/Link. (*User with Role Approver*) or **Send For Approval** (*User with only Role Closing*)
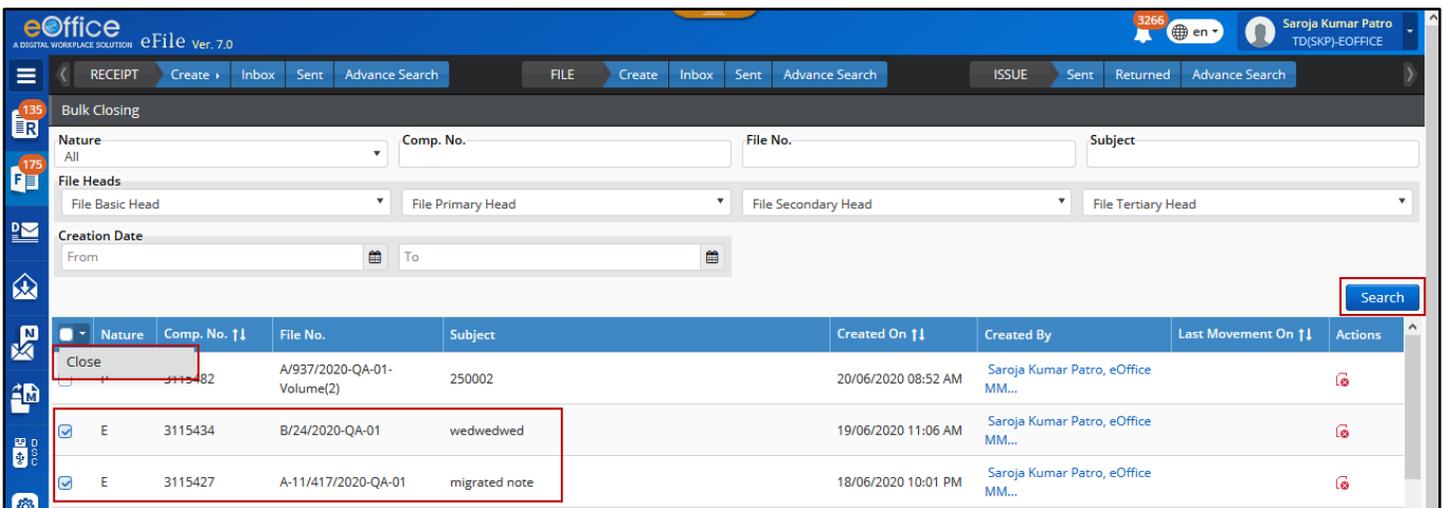

Figure 310

4. Enter Mandatory **Remarks** and click **OK** to close the selected files or Send File for Closing Approval.

Note:

- Closed File will be removed from Inbox /Inbox Folders/Created list.
- Closed File will be displayed under **Closed (By Me)** list of Files module.
- Files **Send for Closing Approval** will be displayed under **Submitted Files for Closing Approval** module with pending status.
- All the receipts inside the file (as correspondence) will be closed.
- State of the file should be changed to CLOSED.
- Entry of Action, Action By, Action On, Action Remarks values should be displayed in File Closing

- No action will be allowed on the file once closed except viewing details of the file, and option to Re-Open the closed file from Closed (By Me) list.
- User will have the option to Record closed physical file from Closed (By Me) list (Configurable feature).

Submitted Files for Closing Approval

This feature allows the user to **View** the **Submitted Files for Closing Approval** list and take various actions like **'Close', 'Move to Inbox', 'Cancel'** for **Approved, Rejected and Pending** approval status respectively.

STEPS TO FOLLOW:

Click **Submitted Files for Closing Approval** Link Under **File➔Inbox** Module to view list of files send for closing approval.
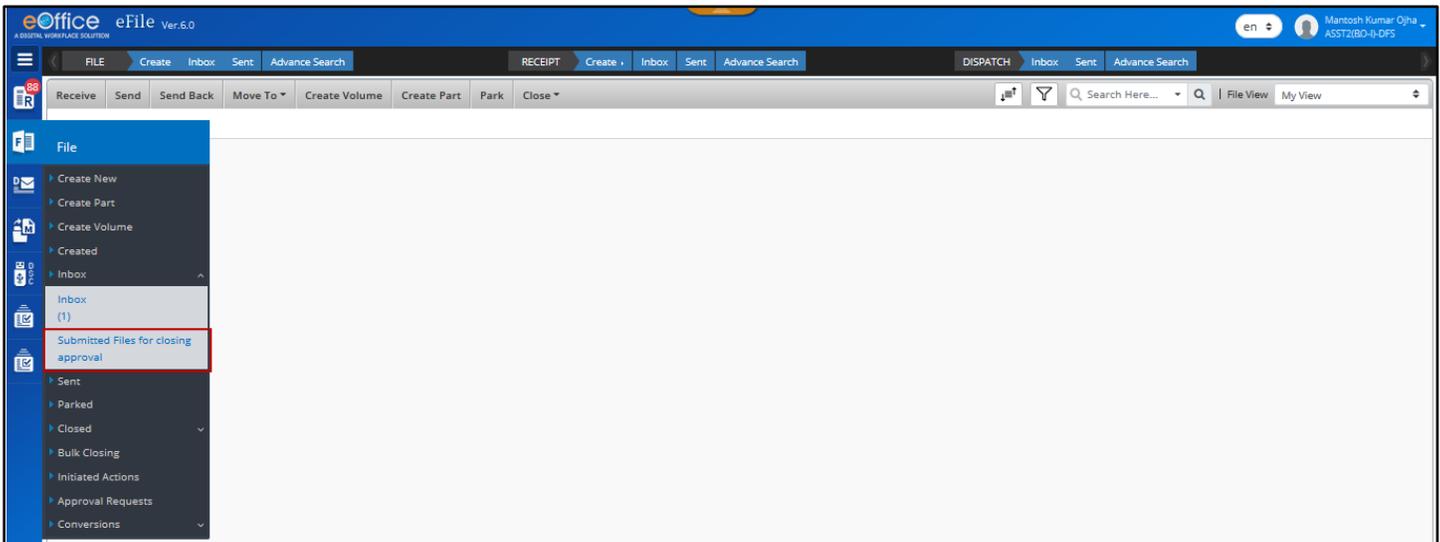
Figure 311

Figure 312

- **Submitted Files for Closing Approval** list can be **filtered** depending on **Nature, Approval Status, Initiation Date and Rejection Date** by clicking Filter Icon in menu bar.
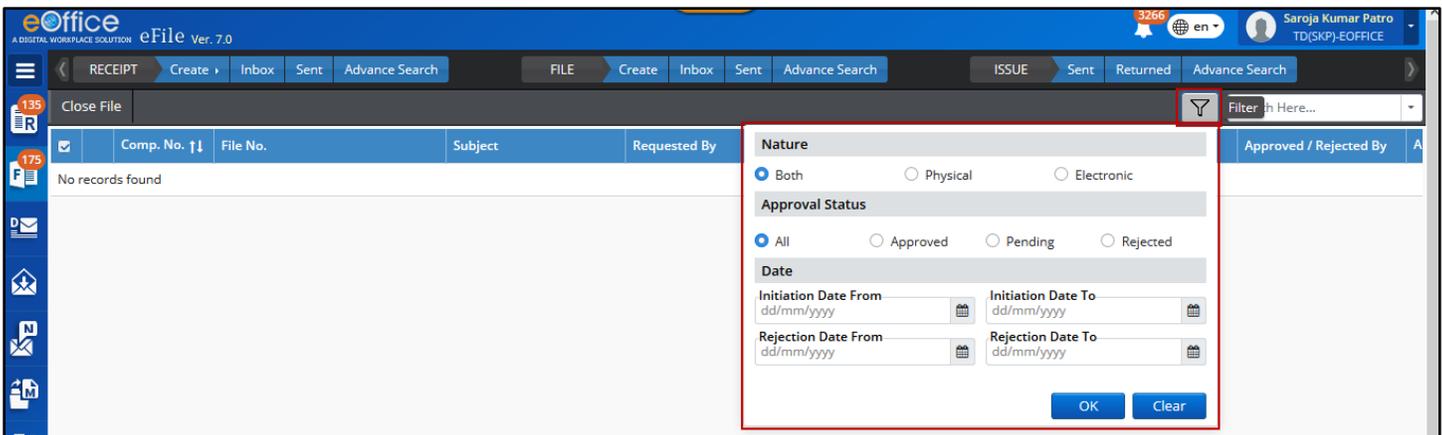

Figure 313

- File available in **Submitted Files for Closing Approval list** can be **Searched** using module search (Computer No., File No., Initiated By, Approved/Rejected By, Dealing Section, Requesting Remarks and Status).
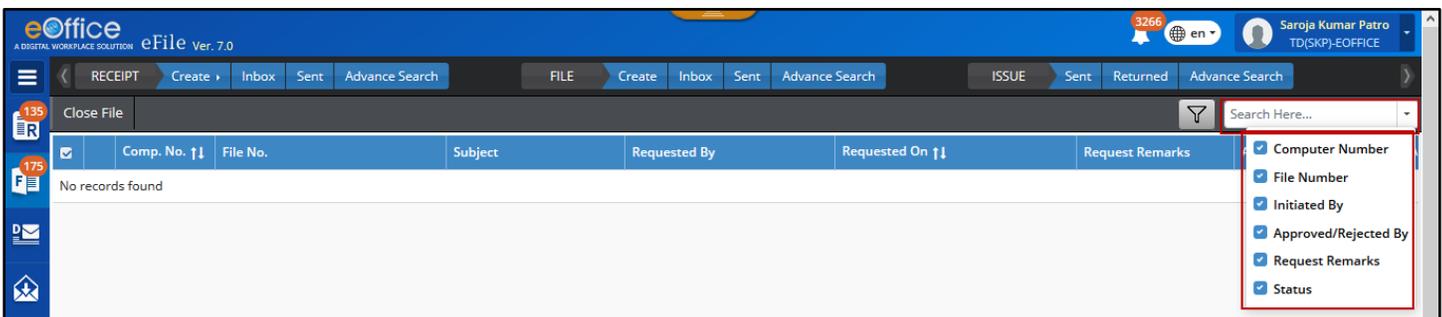

Figure 314

- Files with **Approved** Status can be **Closed** by clicking on **Close** Menu or Link.

- Files with **Rejected** Status can be moved to Inbox by clicking on **Move to Inbox** Link.

- Files with **Pending** Status can be **Cancelled** by clicking on **Cancel** Link.

- List of **Approvers** can be viewed for that particular file by clicking on '**View Approvers**' link.

List of Closed Files

This section describes the different lists available to check the receipts which are in closed state.

STEPS TO FOLLOW:

1. Click **Closed** sub module under **File** module.

2. Click **'By Me'** or **'By Others (Hierarchy)'** or **'By Others (All)'**, as required.

Closed (By Me):

Figure 315

- It displays the list of Files closed by self.

- User will not be able to take any action on Files with closed state, except to View, Re-open/Send for Reopening Approval.

- Closed File List can be **filtered** with help of various search options such as **Closing date range, Computer No., File No**, **Subject**, **Remarks and File Heads**.

By Others (Hierarchy) –

Figure 316

- It displays the list of Files closed by others users in the viewer's hierarchy down line.

- User will not be able to take any action on Files with closed state, except to view them.

- Closed File List can be **filtered** with help of various search options such as **Section, Closing date range, Computer No., File No**, **Subject**, **Remarks and File Heads**.
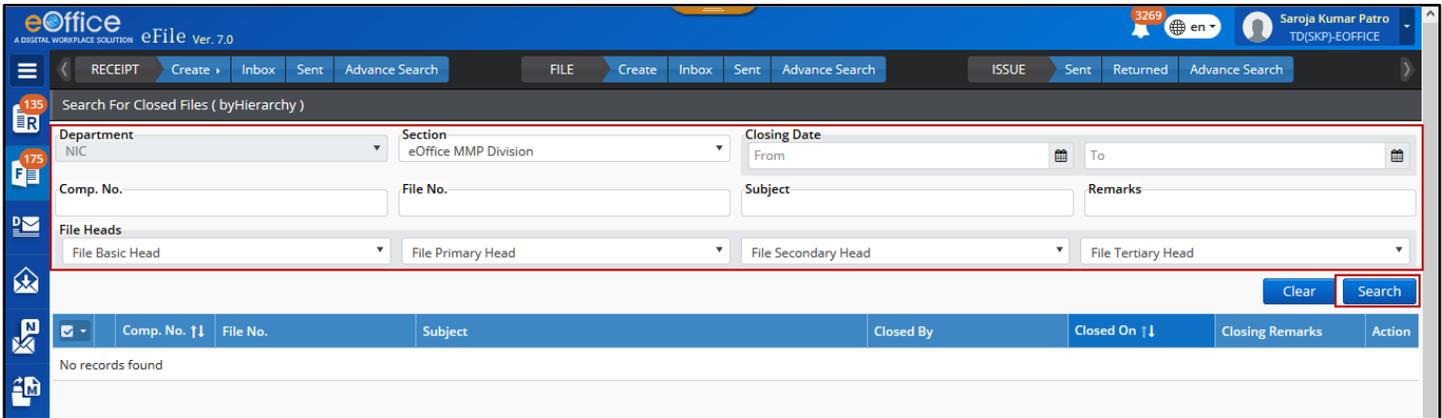

Figure 317

Note:

▪ Users with role **'Role_ClosedByOthersHierarchy'** will only be able to see this list.
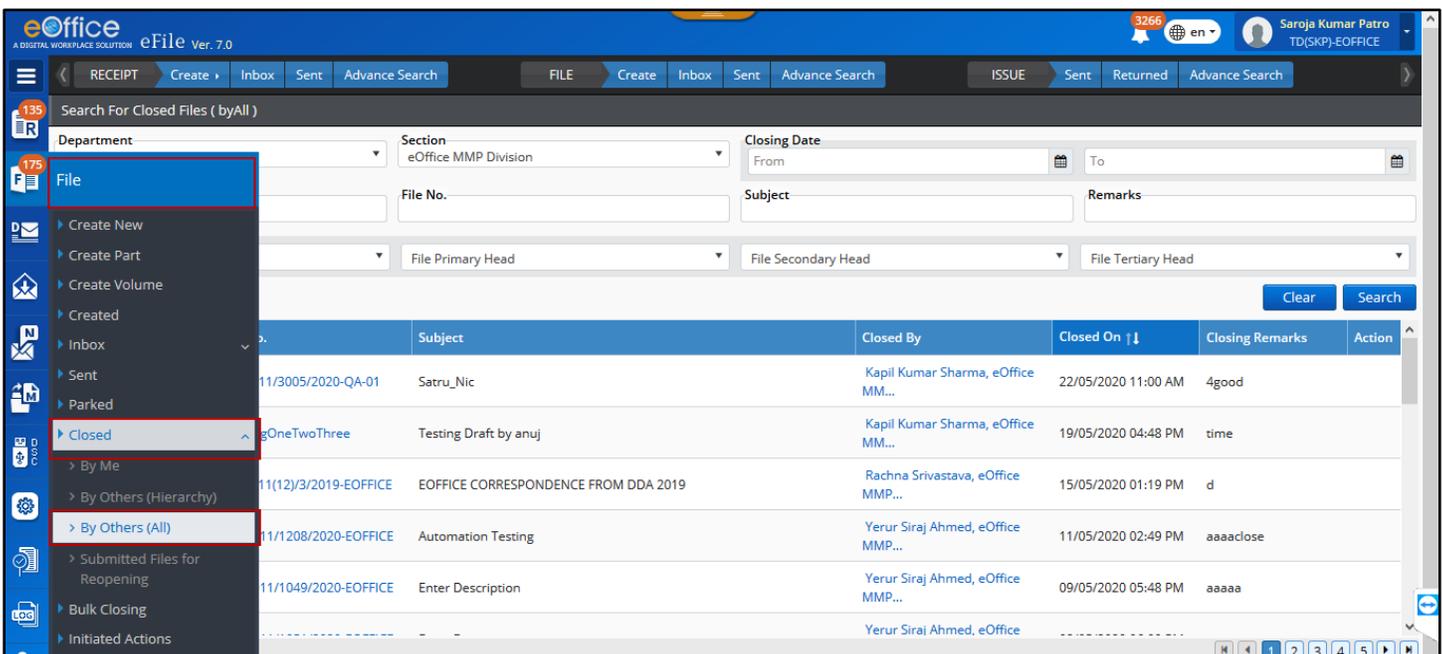
By Others (All)

Figure 318

- It displays the list of receipts closed by others users in the viewer's hierarchy downline.

- User will not be able to take any action on receipts with closed state, except to view them.

- Closed File List can be **filtered** with help of various search options such as **Department,Section, Closing date range, Computer No., File No**, **Subject**, **Remarks and File Heads**.
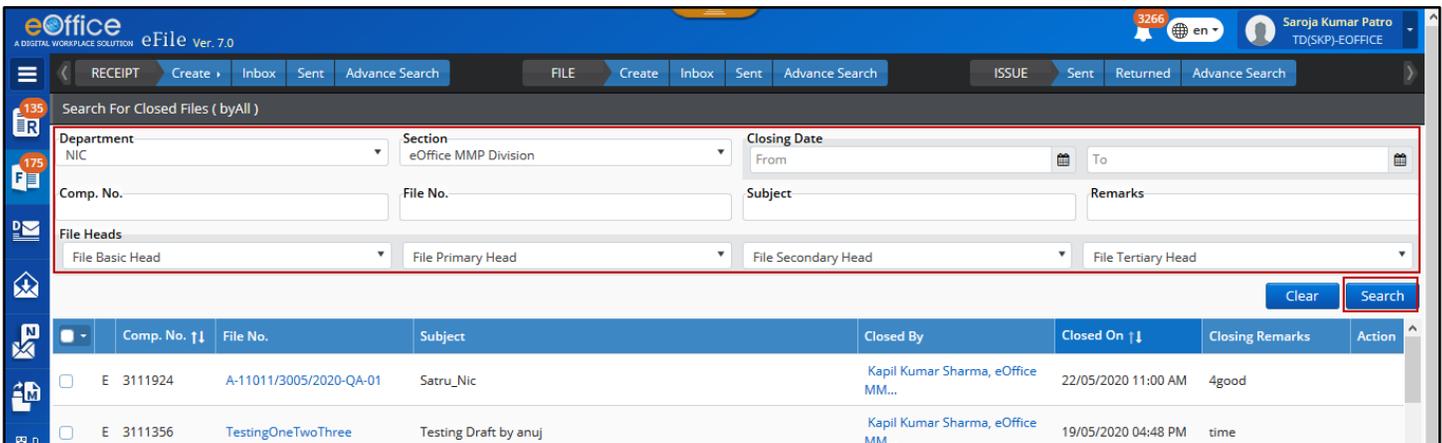
Figure 319

Note:

- Users with role **'Role_ClosedByOthersAll'** will only be able to see this list.

Closed File History:

'Closed File History' provides the details about the number of times the file was closed and re-opened. These details include the type of action taken place (close/re-open), action taken by (user details), action taken date and its remarks for the action.

STEPS TO FOLLOW:

1. Click opens a File from Inbox/Inbox folder/Created/Sent/Closed.

2. Click **Details** Menu.
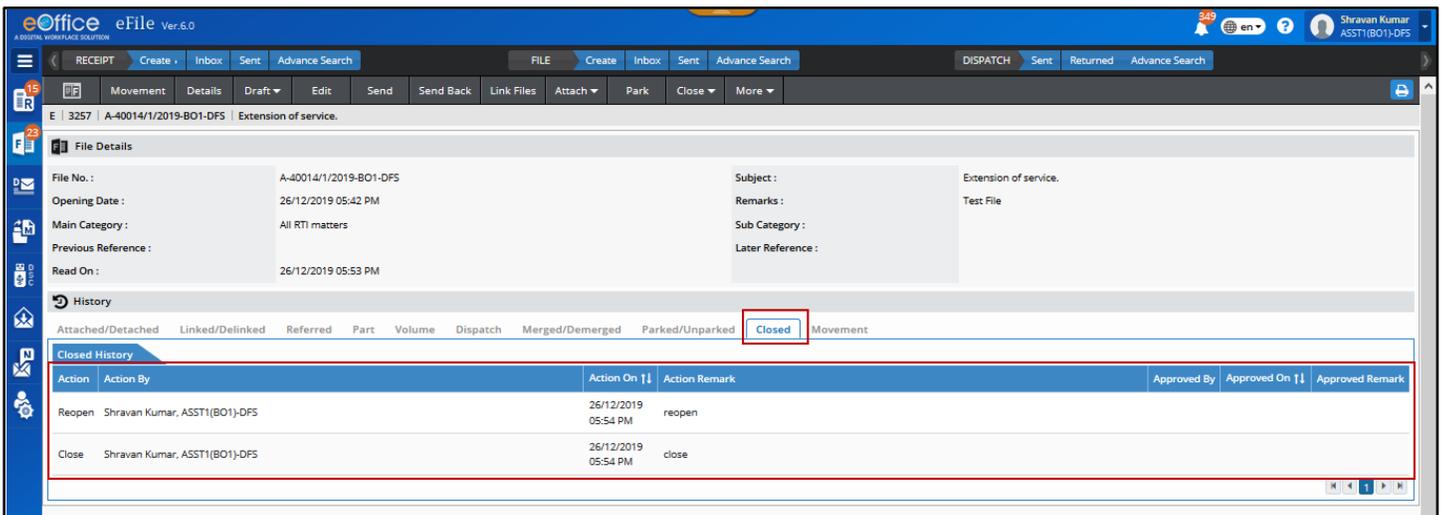
3. Click **Closed Tab** under History details.

Figure 320