File management

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TO SET THE MOOD

Accountability

There were four people and an important job to be done.

Everybody **Anybody** **Somebody** **Nobody**

Nobody knew that Everybody was not going to do it.
Everybody was sure that Somebody would do it.
Anybody could have done it.
In the end, Nobody did it.

AmUrite.com

Office is a work place where teams of people work together, mostly in a hierarchy. People are paid for their efforts by the organization.

An office is a kind of control tower where information is processed to facilitate a competent authority to take decisions to achieve organizational goals

COMMON OFFICE FUNCTIONS

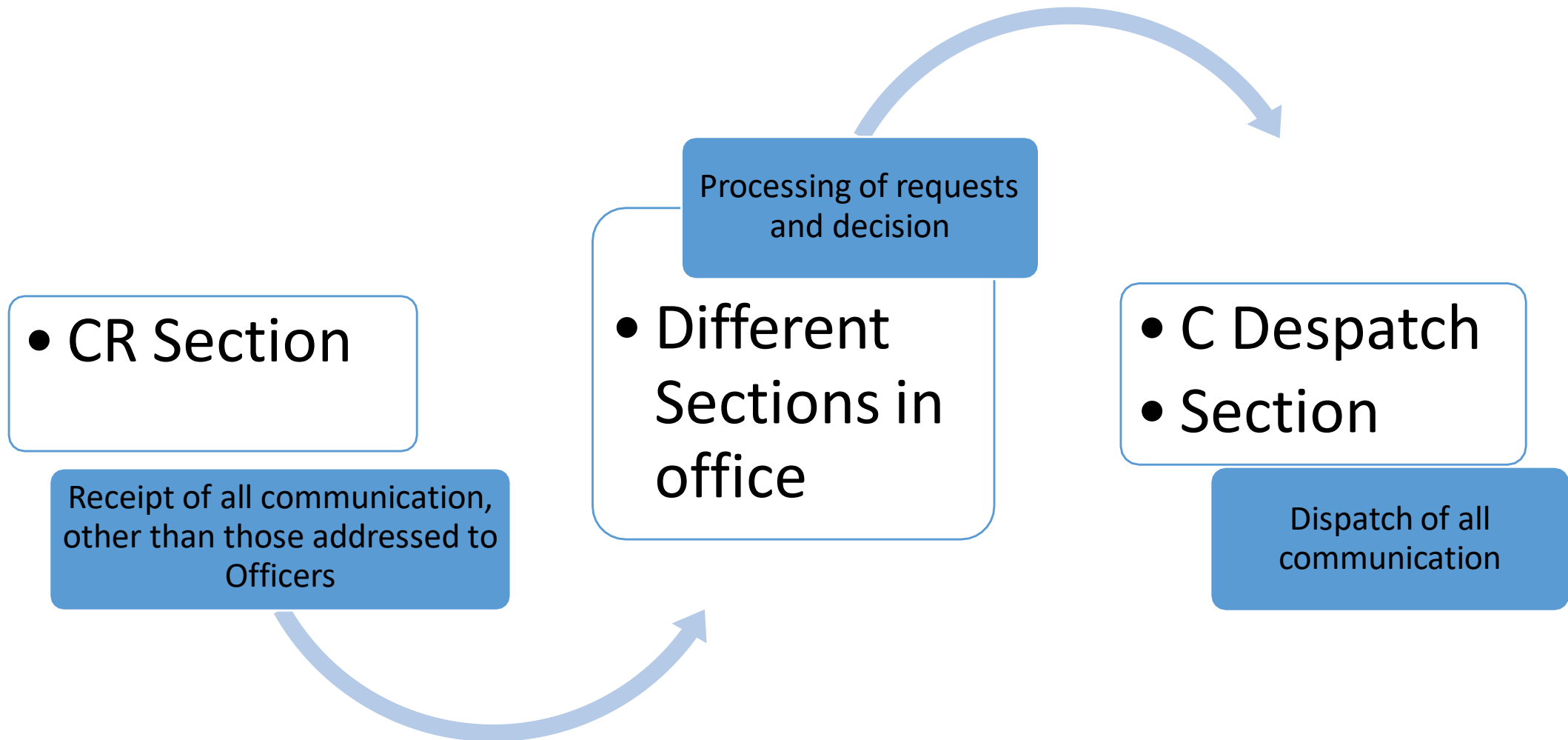COLLECTING INFORMATION

CLASSIFYING INFORMATION

STORING INFORMATION

PROCESSING   INFORMATION

MONITORING INFORMATION

TAKING   DECISION

INFORMATION
COMMUNICATING

FUNCTION	TOOLS WHICH HELP TO PERFORM FUNCTIONS
COLLECTION OF INFORMATION	INCOMING COMMUNICATION
CLASSIFICATION OF INFORMATION	FILING SYSTEMS
PROCESSING OF INFORMATION	NOTING
COMMMUNICATION OF INFORMATIONN	DRAFTING OF OUTGOINNG COMMUNICATION
MONITORING OF ACTION TAKEN	REPORTS AND RETURNS
STORING OF INFORMATION	PRINCIPLES AND TECHNIQUES OF RECORD MANAGEMENT

CR Section and other section

CR Section

Receipt of all communication, other than those addressed to Officers

Processing of requests and decision

Different Sections in office

C Despatch

Section

Dispatch of all communication

CR Section

- A section or unit within a department
- Junior Secretariat Assistant(JSA) and Multi Tasking Staff (MTS) are posted in this section
- Responsible for
  - Receipt of dak
  - Registering dak
  - Distribution of dak among the sections and officers as per the 'work allocation chart'
  - Converting physical dak into electronic document, if necessary

Dak

- All communications received or issued by a department
- Received in a centralized section
- Called Central Registry

Receipt, PUC and FR

- Receipt is a 'dak' received in the concerned section or the concerned officer
- PUC: Paper Under Consideration. It is a receipt pertaining to a case, the consideration of which is the subject matter of the case
- FR: Fresh Receipt. Any subsequent receipt on a case which brings in additional information

Email, SMS and WhatsApp

- Email received in the Department are downloaded centrally and

- forward the section or officer concerned.

- Emails addressed to Ministers/Officers will be downloaded by them or their personal staff

- SMS and WhatsAPP are also used to communicate with citizens.

- Issue of formal guidelines on SMS and WhatsApp are under consideration

File Management

What is a 'File'?

- Collection of papers

- On a specific subject

- With an alpha-numeric code

- Has one or more of the following parts:
  - Notes portion
  - Correspondence portion
  - Appendix to notes
  - Appendix to correspondence
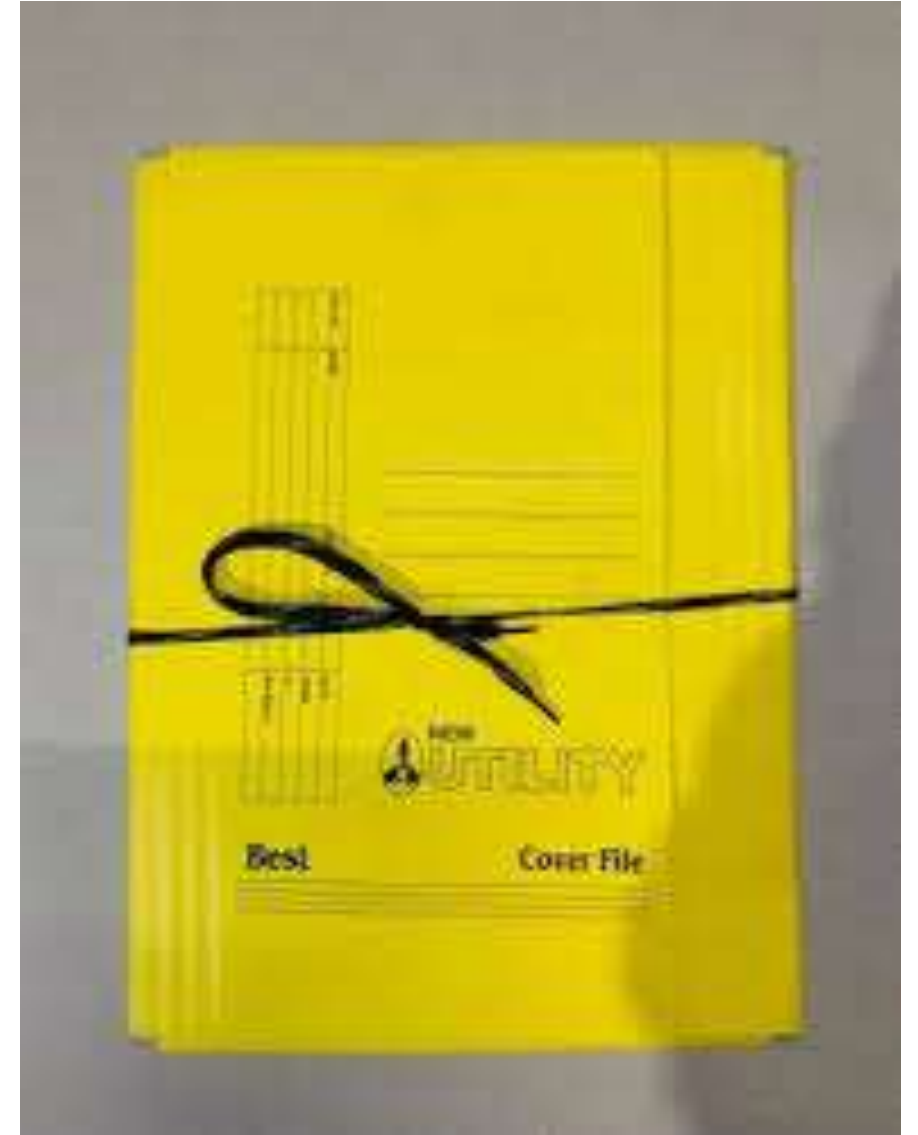
The world of Physical Files

Parts of a file:
Notes & Correspondence portions

- Notes Portion
  - Portion containing the 'notes' or 'minutes' recorded on a case
- Correspondence portion
  - Portion containing the 'receipts' & office copies of 'issue'
  - Also self-contained inter-departmental notes

Parts of a File

<<<
Noting
this
Side

>>>
Correspondence
this
side

Parts of a file:
Notes & Correspondence portions

तारीख: 12.12.2022

टिप्पणी

विषय : Permission to use the Conference Hall in RTI, Hyderabad on 15th an 16the December,2022

संदर्भ: Indent letter No.AG (A&E)TS/OE-IV/Genl/2022-23 dated 12.12.2022 *(Page 4/c)*

****

PUC is the letter cited on the captioned subject received from SAO/OE., O/o AG(A&E), elangana. In this , it was requested to accord permission to utilize the Lecture Hall and Conference all in C-Block, Third floor of this office on 15.12.2022 and 16.12.2022 (2 days) for conducting orkshop on VLC Application Change Management.

If approved, the allotment of Conference Hall and Lecture Hall will be communicated to AO/OE, O/o AG(A&E), Telangana.

अनुमोदनार्थ प्रस्तुत।

Submitted for approval please.

Q ↑ | ↓   4   of 4   − | +   Automatic Zoom ∨

The Sr. Audit Officer (Admn),
O/o The Regional Training Institute,
Telangana, Hyderabad.

Sub: Allotment of Conference Hall -reg.

*****

Sir,

With reference to the subject cited, a Workshop on VLC Application Change Management is to be conducted by this office on 16th December 2022. In this regard it is requested that the Conference hall and a Lecture Hall may be provided on 15-12-22 and 16-12-2022 for conducting the workshop. A letter of confirmation in this regard would be helpful.

Yours faithfully,

12/12

Sr. Accounts Officer/OE

Types of Noting

- ***ROUTINE CASES-***
- These cases are regular and repetitive in nature the quantum of noting required is often minimal.
- ***Correspondence Handling Cases-***
- A paragraph of noting usually suffices to dispose of correspondence handling cases. Here, the noting states the information about the correspondence received and the reply to be sent.

- ***Problem Solving and Policy and Planning Cases-***
- Like the name suggests, these types of cases involve dealing with a problem, creation, or implementation of a new policy. Since a problem can be solved in more ways than one, these are the types of cases that require a good amount of noting.
- In fact, these cases are can be so complicated that even the most accomplished officers with the best noting and drafting skills in the department can have trouble with them. This could mean that you don't see these cases as often as the routine and correspondence handling cases.

Filing of papers

- Papers are punched on the left top corner
- Filed in a chronological order
- Tagged into the appropriate portion
- Both the 'notes' portion & the 'correspondence' portion are placed in a single folder
- Left side of tag in the notes portion tagged into the left side of the file cover

Punch
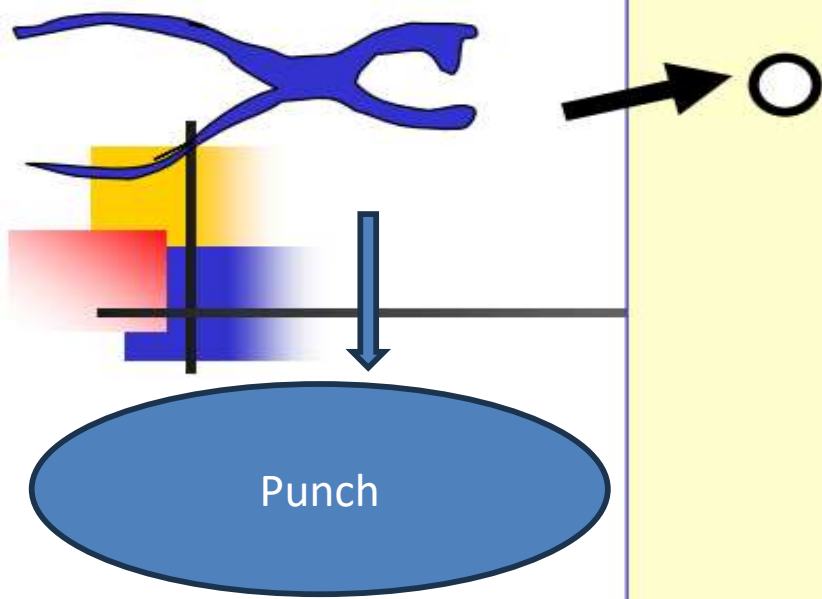
S.No.17(R)   Pg. No.22/C

" Link-up the minutes
of the previous meeting
and consult DoPT"
Sd/-
(Satish Jain)
DS(A)
5.5.15
This relates to creation of
a post of Scientific Officer,
at CS Lab, Bangalore.

2. Minutes of the previous
meeting are linked - up.
A self contained I.D. Note is
put up for approval, please.

Pg 10
-12/C

O   S.No.17(R)   22

No.F.42-34/2015-TKM
Govt. of India
Office of the PSA

New Delhi
Link-up the   Dated -- -- --
minutes of the
Previous meeting
     cretary
D/ Science & Technology

Subject :----

Sir,
This is to bring to your
kind notice that ....
--.......etc. etc.

(Dr.M Anandan)
Scientific Advisor

Filing of papers..

- Left side of tag in the correspondence portion tagged into the left side of the file cover

- Different manners of filing papers:
  - Latest on the top; or
  - Latest at the bottom

- Uniformity is to be maintained in filing of papers in any office

Filing System - Exercise

- Kindly peruse all the documents in packet
- Identify –
  - the noting side documents and
  - Correspondence side documents
- Arrange all the documents chronologically into a file

File numbering system

- Necessary for convenient–
  - Identification
  - Sorting
  - Storage &
  - retrieval
- Types of filing system
  - Conventional system
  - Functional filing system

Conventional system

| 10 | / | 8 | / | 2023 | / | Admn |

Standard subject head

Serial number of the file
Opened under the standard subject head
During the year

Year of opening of the file

Ownership of the file

19
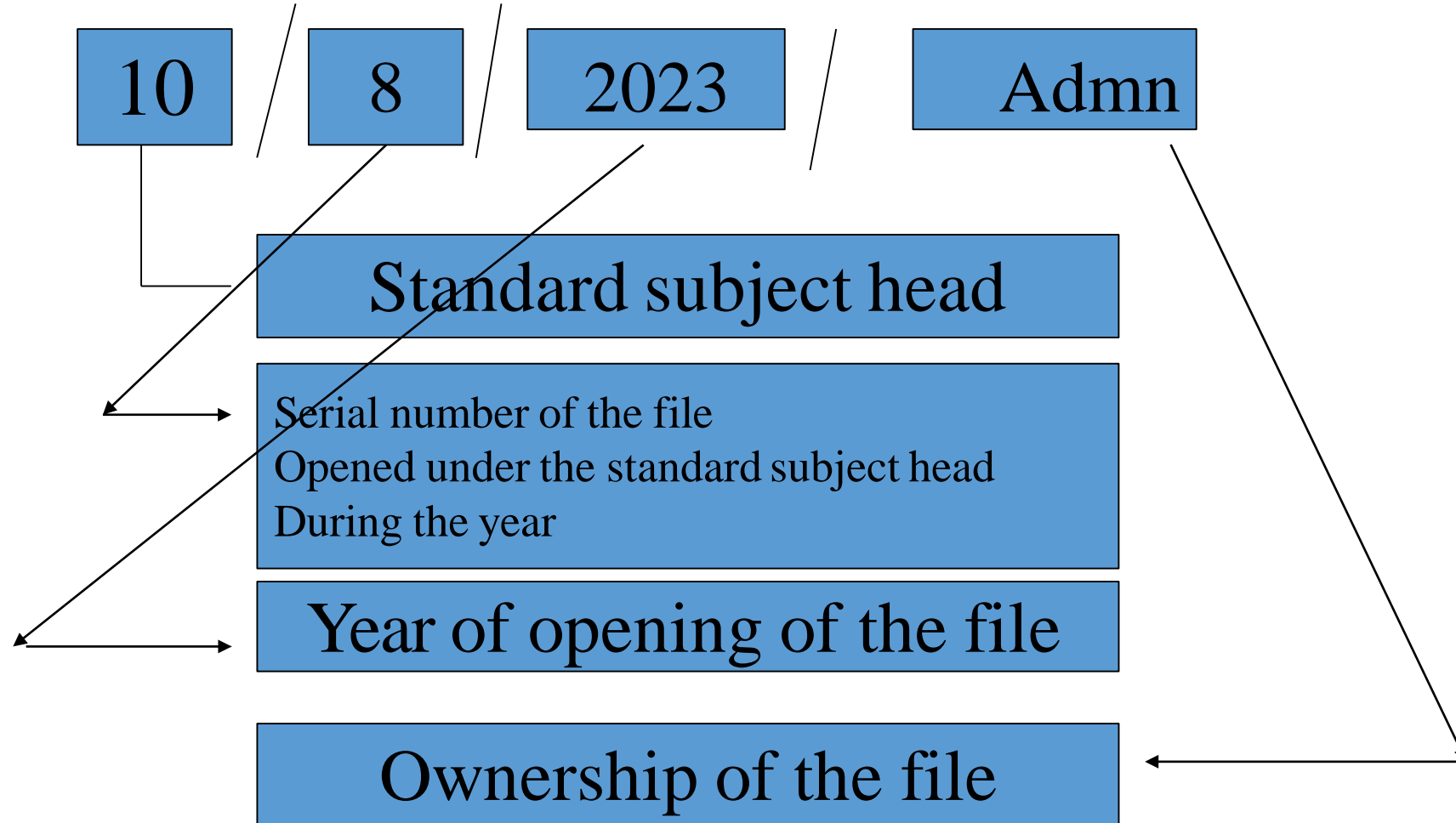
Volume of a file

- When the notes & the correspondence portions of a file becomes bulky, a second volume of the file is opened

- Bulky: 150 pages

- Against the 1st one, the suffix 'Vol-I' is added

- Originally '11011/1/2008-AdmII'; after opening 2nd volume '11011/1/2008-AdmII-Vol-I'

- Opening a new volume does not mean giving a new number!

Part file

- When opened –
  - Main file under submission
  - Need to process another FR urgently; or
  - Need to consult two or more Sections simultaneously

- Part file consists of –
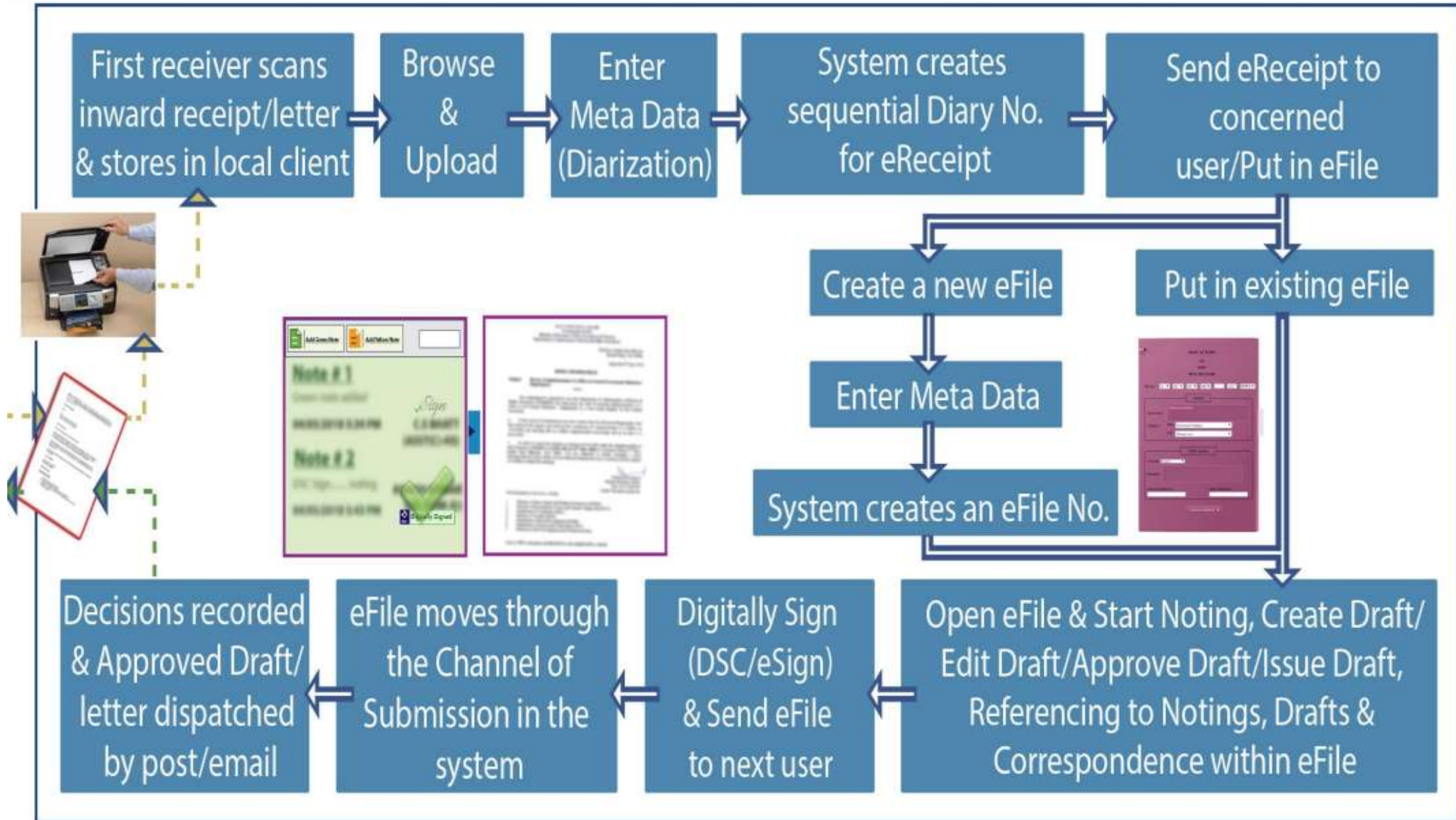 - Receipt & notes thereon

e- File

File Management System (eFile)

eFile is a workflow based system that replaces the existing manual handling of files with a more efficient electronic system.

This system involves all stages, including the electronic diarization of inward correspondence, creation of files, movement of correspondences and files, electronic signing of noting & drafts using Digital Signature Certificates (DSC), eSign, and finally, the archival of records.

Receipts	Files
• Diarization – Electronic / Email / Physical • Acknowledgement Generation • Receipt to Receipt and File Attachment • VIP Letter Tracking • Address Book • Signing on remarks • Legends on priority • Advanced Search on metadata • Receipt Status Monitoring System • Closing of Receipts	• File Creation – Electronic and Physical • Notings (Green and Yellow Note) • Correspondence • Draft for Approval (DFA) • Referencing • Digital Signatures on Noting and DFA • File to File and Receipt Attachment • Linking of File • Closing of File • Advanced Search on metadata
Dispatch	**Reports**

• Templates Selection
• Digital Signatures
• Advanced Search on metadata
• Reminders and Follow-ups
• Dispatch sent through email and post
	• MIS Reports
	    ➢ File/Diary Register Report
	    ➢ File/Diary Movement Report
	    ➢ File/Diary Pendency Reports
	    …… many more

eFile Process

First receiver scans inward receipt/letter & stores in local client → Browse & Upload → Enter Meta Data (Diarization) → System creates sequential Diary No. for eReceipt → Send eReceipt to concerned user/Put in eFile

Create a new eFile   Put in existing eFile

Enter Meta Data

System creates an eFile No.

Open eFile & Start Noting, Create Draft/ Edit Draft/Approve Draft/Issue Draft, Referencing to Notings, Drafts & Correspondence within eFile

Digitally Sign (DSC/eSign) & Send eFile to next user

eFile moves through the Channel of Submission in the system

Decisions recorded & Approved Draft/ letter dispatched by post/email

Receive | Send | Send Back | Move To ▾ | Create Volume | Create Part | Park | Close ▾

Search Here... | File View (SELF) | Select User

		Comp. No. ↑↓	File No.	Subject	Sent By	Sent On ↑↓	Read On ↑↓	Due On ↑↓	Remarks
☐	☆ E	17829	PD/RTI-HYD/Bills/Medical/2019/ ...	Medical Claims of RTI,Hyderabad staff	R S VANI PRASAD, Admin (RTI Hy ...	07/10/2023 04:33 PM	08/10/2023 07:26 PM		
☐	☆ E	22403	No.PD/RTI-HYD/L&S/LP-Stationer ...	**Local Purchase of Stationery items and Library boo ...**	RAHIM P, Admin (RTI Hyderabad)	07/10/2023 01:08 PM			
☐	☆ E	15090	No.PD/RTI-HYD/L&S/OOE-Misc/201 ...	**Sanctions and Expenditure under OOE-Miscellaneous**	RAHIM P, Admin (RTI Hyderabad)	07/10/2023 12:50 PM			
☐	☆ E	15660	No.PD/RTI-HYD/Admn/Deputation/ ...	Selection of officials for filling up of vacant p ...	KURAPATI VENKATA SESHA YASO KR ...	27/09/2023 03:33 PM	27/09/2023 04:24 PM		
☐	☆ E	18010	No.PD/RTI-HYD/Admn/Deputation- ...	Extension of Deputation Tenure in RTI, Hyderabad	KURAPATI VENKATA SESHA YASO KR ...	26/09/2023 03:27 PM	27/09/2023 10:07 AM		
☐	☆ E	17207	PD/RTI-HYD/Admn/Staff/Return/2 ...	Monthly staff position return to Headquarters offi ...	R S VANI PRASAD, Admin (RTI Hy ...	25/09/2023 09:41 AM	25/09/2023 09:41 AM		
☐	☆ E	5469	No.PD/RTI-HYD/Admn/Genl-Misc/2 ...	Correspondence on General and Miscellaneous Admini ...	KURAPATI VENKATA SESHA YASO KR ...	08/09/2023 06:11 PM	11/09/2023 01:36 PM		
☐	☆ E	17289	No.PD/RTI-HYD/Admn/Budget-ITHa ...	Proposals for seeking funds from CAG office under ...	KURAPATI VENKATA SESHA YASO KR ...	06/09/2023 05:23 PM	07/09/2023 03:18 PM		
☐	☆ E	5751	No.PD/RTI-HYD/Admn/RTI-Bldg/20 ...	**Construction of RTI, Hyderabad building at Kattalm ...**	KURAPATI VENKATA SESHA YASO KR ...	06/09/2023 05:22 PM			
☐	☆ E	20669	No.PD/RTI-HYD/Admn/WorkAllocat ...	Allocation of work among officers and Staff of RTI ...	KURAPATI VENKATA SESHA YASO KR ...	06/09/2023 05:22 PM	07/09/2023 03:16 PM		

Total Records: 39

« ‹ 1 2

Receive | Send | Send Back | Move To ▾ | Create Volume | Create Part | Park | Close ▾ | ▽ | Search Here... ▾ | File View (SELF) | Select User

Receipt 2

Browse & Diarise ⌄
› Physical
› Electronic

Inbox ⌄
› Inbox 2

Created

Sent

Initiated Actions

Acknowledgement ⌄
› Created

Closed ⌄
› With Me

File 4

Dispatch

Received Letters

☐		Comp. No. ↑↓	File No.		Subject	Sent By	Sent On ↑↓	Read On ↑↓	Due On ↑↓	Remarks
☐	☆ E	17829	PD/RTI-HYD/Bills/Medical/2019/ ...		Medical Claims of RTI,Hyderabad staff	R S VANI PRASAD, Admin (RTI Hy ...	07/10/2023 04:33 PM	08/10/2023 07:26 PM		
☐	☆ E	22403	No.PD/RTI-HYD/L&S/LP-Stationer ...		Local Purchase of Stationery items and Library boo ...	RAHIM P, Admin (RTI Hyderabad)	07/10/2023 01:08 PM			
☐	☆ E	15090	No.PD/RTI-HYD/L&S/OOE-Misc/201 ...		Sanctions and Expenditure under OOE-Miscellaneous	RAHIM P, Admin (RTI Hyderabad)	07/10/2023 12:50 PM			
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☐	☆ E	18010	No.PD/RTI-HYD/Admn/Deputation- ...	📎	Extension of Deputation Tenure in RTI, Hyderabad	KURAPATI VENKATA SESHA YASO KR ...	26/09/2023 03:27 PM	27/09/2023 10:07 AM		
☐	☆ E	17207	PD/RTI-HYD/Admn/Staff/Return/2 ...		Monthly staff position return to Headquarters offi ...	R S VANI PRASAD, Admin (RTI Hy ...	25/09/2023 09:41 AM	25/09/2023 09:41 AM		
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☐	☆ E	17289	No.PD/RTI-HYD/Admn/Budget-ITHa ...		Proposals for seeking funds from CAG office under ...	KURAPATI VENKATA SESHA YASO KR ...	06/09/2023 05:23 PM	07/09/2023 03:18 PM		
☐	☆ E	5751	No.PD/RTI-HYD/Admn/RTI-Bldg/20 ...		Construction of RTI, Hyderabad building at Kattalm ...	KURAPATI VENKATA SESHA YASO KR ...	06/09/2023 05:22 PM			

Total Records: 39

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incurred towards certain essential items for **RCB&KI, Hyderabad.**
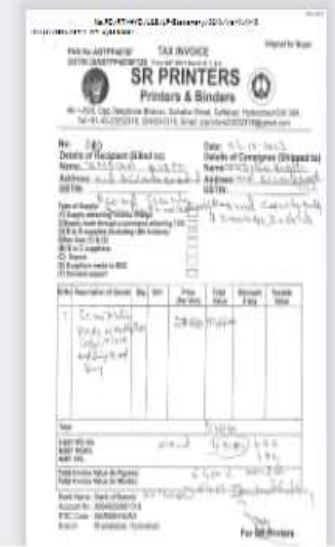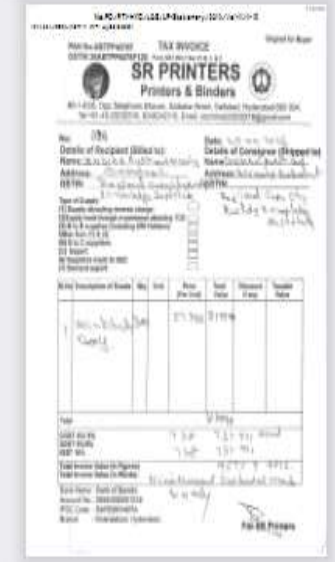
It is to submit that the following expenditure for an amount of **₹ 16,127**/- **(pg no. 179 & 180)** was incurred in RCB&KI, Hyderabad.

The details of expenditure

	Expenditure debitable to OOE- LPS	Amount ₹.
1.	Procurement of Scribbling books (500 nos) for training participants	16,127
	Grand Total	**16,127/-**

अनुमोदन के लिए प्रस्ताव

ESIGN | Registration | DASHBOARD | View | RECEIPT | Create ▸ | Inbox | Sent | Advance Search | FILE | Create | Inbox | Sent | Advance Search | ISSUE | Sent | Retur

2

| Receive | Send | Send Back | Move To ▾ | Create Volume | Create Part | Park | **1** ⋮ | ▽ | Search Here... ▾ | File View (SELF) | Select User |

4

		Comp. No. ↑↓	File No.	Subject	Sent By	Sent On ↑↓	Read On ↑↓	Due On ↑↓	Remarks
☐	☆	E 17829	PD/RTI-HYD/Bills/Medical/2019/ ...	Medical Claims of RTI,Hyderabad staff	R S VANI PRASAD, Admin (RTI Hy ...	07/10/2023 04:33 PM	08/10/2023 07:26 PM		
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☐	☆	E 5751	No.PD/RTI-HYD/Admn/RTI-Bldg/20 ...	**Construction of RTI, Hyderabad building at Kattalm ...**	KURAPATI VENKATA SESHA YASO KR ...	**06/09/2023 05:22 PM**			

Total Records: 39

« ‹ **1** 2

File Inbox / No.PD/RTI-HYD/L&S/LP-Stationer ... E Comp. No.: 22403 File No.: No.PD/RTI-HYD/L&S/LP-Stationery/2019/Vol-II/II-15

Subject: Local Purchase of Stationery items and Library boo ...

incurred towards certain essential items for RCB&KI, Hyderabad.

It is to submit that the following expenditure for an amount of **₹ 16,127**/- **(pg no. 179 & 180)** was incurred in RCB&KI, Hyderabad.

The details of expenditure

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1.	Procurement of Scribbling books (500 nos) for training participants	16,127
	Grand Total	**16,127/-**

अनुमोदन के लिए प्रस्ताव

Movement | Details | Draft ▾ | Edit | Send | Send Back | Link Files | Attach ▾ | Park | Close ▾ | Review ▾ | More ▾

File Inbox / No.PD/RTI-HYD/L&S/LP-Stationer ...   E Comp. No.: 22403   File No.: No.PD/RTI-HYD/L&S/LP-Stationery/2019/Vol-II/II-15   Subject: Local Purchase of Stationery items and Library boo ...

✎ Add Green Note   ✎ Add Yellow Note

Note # 99

No.RCB&KI-Hyd/LS& Bills/2022-23/

Date: 06/10/2023

टिप्पणी

विषय : **Financial Sanction towards miscellaneous expenditure incurred towards certain essential items for RCB&KI, Hyderabad.**

It is to submit that the following expenditure for an amount of **₹ 16,127/- (pg no. 179 & 180)** was incurred in RCB&KI, Hyderabad.
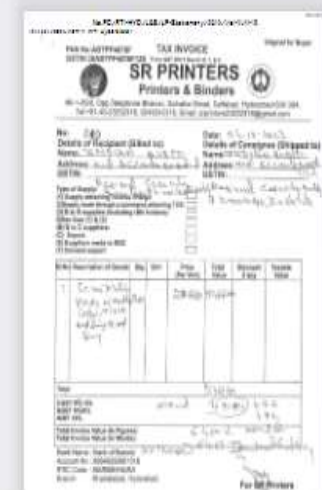
The details of expenditure

	Expenditure debitable to OOE- LPS	Amount ₹.

List of Correspondences

		Receipt/Issue No.	Subject	Marked As	Attached On ↑↓	Issued On ↑↓	Pages	Remarks
☐	ⓘ	1244394/2023/Admin (RTI Hyderabad)	Scribbiling note pads		07/10/2023 01:06 PM		179-180	Scribbling note pads
☐	ⓘ	1219929/2023/Admin (RTI Hyderabad)	Purchase of Scribbling notes for training particip ...		27/09/2023 01:05 PM		177-178	scribbling books
☐	ⓘ	1189892/2023/Admin (RTI Hyderabad)	Scribbling pad		16/09/2023 02:02 PM		176-176	ref
☐	ⓘ	1147880/2023/Admin (RTI Hyderabad)	Classmate pens		02/09/2023 05:00 PM		174-175	Classmates pens

« ‹ 1 2 3 4 › »

Add Receipt

DRAFTING

➢ A draft is rough copy of the communication which is intended to be issued to convey decision or decisions or views of the competent authority.

➢ Drafting is the process of preparing rough copy.

➢ It is prepared on behalf of the competent authority.

ESIGN | Registration | DASHBOARD | View | RECEIPT | Create ▸ | Inbox | Sent | Advance Search | FILE | Create | Inbox | Sent | Advance Search | ISSUE | Sent | Returned | Advance Search ⟩

Movement | Details | Draft ▾ | Edit | Send | Send Back | Link Files | Attach ▾ | Park | Close ▾ | Review ▾ | More ▾

nbox / No.PD/RTI-HYD/L&S/LP-S | Create New Draft | E | Comp. No.: 22403 | File No.: No.PD/RTI-HYD/L&S/LP-Stationery/2019/Vol-II/II-15 | Subject: Local Purchase of Stationery items and Library boo ...

View Draft

Add Green Note | ✏ Add Yel... | 🔽 | ▦

List of Correspondences

99

No.RCB&KI-Hyd/LS& Bills/2022-23/

Date: 06/10/2023

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☐	ⓘ	1219929/2023/Admin (RTI Hyderabad)	Purchase of Scribbling notes for training particip ...		27/09/2023 01:05 PM		177-178	scribbling books
☐	ⓘ	1189892/2023/Admin (RTI Hyderabad)	Scribbling pad		16/09/2023 02:02 PM		176-176	ref
☐	ⓘ	1147880/2023/Admin (RTI Hyderabad)	Classmate pens		02/09/2023 05:00 PM		174-175	Classmates pens

« ‹ 1 2 3 4 › »

Add Receipt

GUIDELINES FOR DRAFTING

➢ A DRAFT SHOULD CARRY THE MESSAGE SOUGHT TO BE CONVEYED IN A LANGUAGE THAT IS CLEAR AND CONCISE. INCAPABLE OF MISCONSTRUCTION

➢ REPETITION OF WORDS/ IDEAS/ OBSERVATIONS SHOULD BE AVOIDED.

➢ BE LUCID, BRIEF AND COMPLETE

➢ BE DIVIDED INTO PARAGRAPHS, ACCORDING TO THE LOGICAL SEQUENCE OF IDEAS EXPRESSED. HAVE COHERENCE OF FLOW OF IDEAS

GUIDELINES Contd.......

➤ CONTAIN REFERENCE TO PREVIOUS CORRESPONDENCE, IF ANY.

➤ ALL DRAFTS PUT UP SHOULD HAVE THE FILE NUMBER.

➤ SHOULD CLEARLY SPECIFY THE ENCLOSURES WHICH ARE TO ACCOMPANY THE FAIR COPIES

➤ RESULT IN THE DESIRED RESPONSE FROM THE RECIPIENT

K.N. DEEPAK RAJ
AAO(Admn)

en

ESIGN   Registration   DASHBOARD   View   RECEIPT   Create ›   Inbox   Sent   Advance Search   FILE   Create   Inbox   Sent   Advance Search   ISSUE   Sent   Returned   Advance Searc

Movement   Details   Draft ▾   Edit   Send   Send Back   Link Files   Attach ▾   Park   Close ▾   Review ▾   More ▾   Close ▾

File Inbox / PD/RTI-HYD/Bills/Medical/2019/ ...   E   Comp. No.: 17829   File No.: PD/RTI-HYD/Bills/Medical/2019/III-3   Subject: Medical Claims of RTI,Hyderabad sta

◉ Internal

Organisation

RTI Hyderab...   ›   Choose One   ›

All	Preferred List	Recent 5	In channel	Sub-ordinates	Send Back

Reporting Officer

To *

Notify Through : ☐ Email ☐ SMS

Note : Email/SMS will be sent based on checkbox selection (Notify Through), irrespective of User Preferences and Instance Configuration..

Remarks

Total 1000 | 1000 Character left

Set Due Date
dd/mm/yyyy 🗓

Action
Choose One ▾

Priority
Choose One ▾

	File / Receipt Components		Comp. No.	File No. / Receipt No.	Subject	Note
☑		E	17829	PD/RTI-HYD/Bills/Medical/2019/III-3	Medical Claims of RTI,Hyderabad staff	

Note : Noting in the attached files, if any, will be finalized after movement of main file/receipt.

Current Note	Intimate To

✏ Edit

Note : Before forwarding the file, kindly check the correctness of the Green Note, given above.

✏ eSign(OTP) & Send ❗   🔏 DSC Sign & Send ❗   Send

MONTHLY PROGRESS REPORT

Monthly progress reports of recording and review of files—
(i) On the first working day of each month, the record clerk will prepare, in duplicate, progress reports on the recording and review of files for the preceding month, and submit them, together with the following records, to the section officer:
(a) register for watching the progress of recording.
(b) lists of files received for review.
(ii) The section officer will check the two statements, submit one copy of the report to the branch officer and send the other to the designated unit looking after Internal Work Study.
(iii) The designated section for Internal Work Study (DSIWS) will:
(a) post the figures in the forms at Appendices 43 and 44 of MoP and return the reports to the section concerned;
(b) prepare the consolidated statement for the department as a whole by vertically totalling the columns in the form at Appendices 43 and 44 of MoP;
(c) watch the progress of recording and review work generally; and
(d) bring to the notice of the designated O&M officer and the Secretary, any significant trends in the matter.

Information Management

- File register

- Guard File

- Standard Process Sheet

- E-Office Tools:
    - Setting Priority
    - Reminder and email/sms notification
    - File Movement
    - Reports – pendency