



eoffice
A DIGITAL WORK PLACE SOLUTION

eFile

File Management System

Guidelines for Scanning

NIC-EOF-EFILE-GDL-001



Prepared by
National Informatics Centre

Amendment History

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Introduction

This document entails the procedure to be followed by the assistant/ officer responsible for scanning and metadata entry. A brief on the files to be scanned and the process to be followed for scanning of different files has been finalized and provided in the document.

Prepare Documents

Closed or Recorded/Active physical files will be scanned as and when they are moved into an eFile.

- Unpin / unstaple documents, if any (The staple pins and other pins that are binding the document set will be removed at this Step and each set will be examined for the same at least twice)
- Stick Photographs with glue (in case there are any stapled photographs, remove them and stick them with glue. This needs to be done very neatly)
- Dusting of the document (Removing any unwanted dust which may affect the quality of the image, from the documents)
- Ironing & Smoothing of the document (This is done in case of documents that are folded at the edges)
- Page Numbering-Each page of the document is numbered on the corner. This helps in maintaining the count and also in avoiding any misplaced sheets of any document during the course of file movement etc.
- Clip the document set.

Important Points to Take Care:

Make sure that the scanned documents are readable.

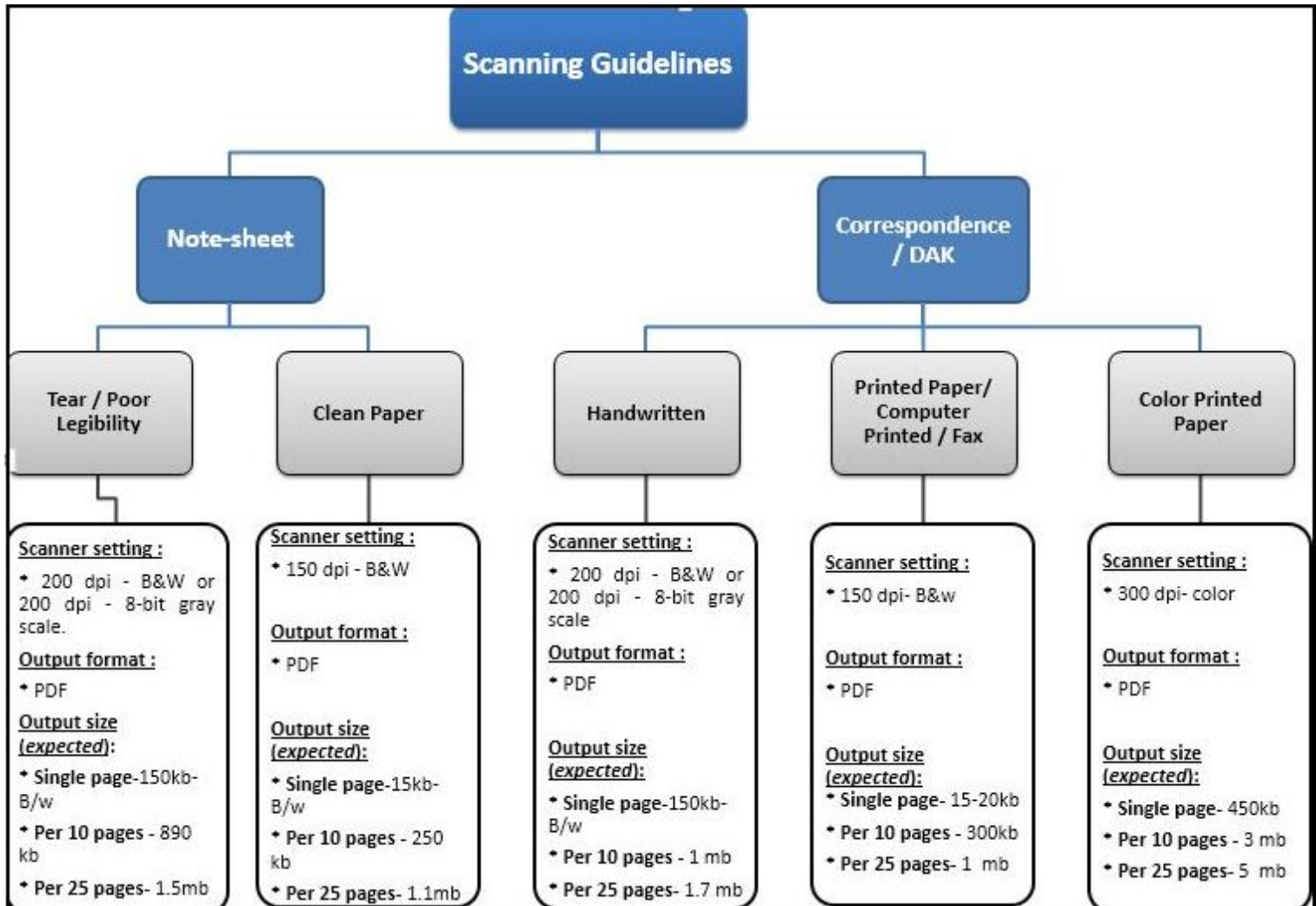
Collect the originals from the scanner collate and clip the documents once again.

All the physical records (per connection) shall be bound in a file. The file should have details of the content and a barcode on the top to help faster retrieval.

If DPI (Dots Per Inch) is more, photo is sharp but the size of the file is more.

If DPI is less, photo is dull but the size of the file is less

Scanning Guidelines



How to select files to be scanned?

This section outlines the guidelines to be followed by the assistant who will be responsible for scanning the files that are in processing and for files that are closed.

- a. **Current files** – Current files are those which are currently in circulation/ in use. They deal with cases that are open and decisions on the issues being considered in them are yet to be finalized. An active file may contain many documents or a few documents depending on its use.
- b. **Closed/Recorded files** – Files are marked as closed/recorded once all actions are complete on the file and the Section Officer gives his approval for closing the file. Closed files have no outstanding fair communications to be issued and no further action due.

Closed/Recorded files may be scanned more selectively with only relevant correspondences and notes being captured. As these files require no further action, versioning and change tracking is not a significant requirement and hence linking/ referencing can be minimized to the documents which directly feed into the actions taken.

Closed files/Recorded files will be scanned as and when they are referenced.

How to select pages in the file for scanning?

All pages in the file will be scanned except the following:

- a. Extra Copies of G.O.s/ D.O. letters issued in the file
- b. Copies of other, older G.O.s referred to in the file. Digitization of knowledge (GOs, acts etc.) is a separate activity. The knowledge bank will be populated after digitization, that digitization of acts, rules, etc. is not related to the file scanning activity.
- c. Copies of vouchers, tickets etc which have been billed already
- d. O.C.s, rough drafts etc. of letters/G.O.s/ Project Reports – fair copies of which have been scanned earlier
- e. Any correspondence/ noting/ issue etc. for which soft copy is already available

How to scan the selected file?

Depending on the contents and complexity of the file we can scan the file as a single pdf or we can scan each page in the file as a separate pdf. The following guidelines are to be followed for scanning active and closed files:

a. Active files -

- i. All notings will be scanned page by page and stored as separate pdf files
- ii. All correspondences will be scanned as single pdf file and logical groups will be created for different sets of correspondences

b. Closed files -

- iii. All notings and correspondences will be scanned and stored as a single pdf file

Metadata Entry

Metadata is data describing the context, content and structure of files/ receipts and their management over time. Metadata allows users to control, manage, find, understand and preserve records over time. The metadata for active files and closed files as per the eFile application is as follows:

| | | | |
|-------------------------|-----------------------------------|----------------------------------|-------------------------------|
| For Active Files | File no | For Closed/Recorded Files | E-file no. |
| | Created by (Name of Section/Desk) | | Closed by |
| | Date & time of creation | | Section |
| | From | | Ministry/ Department |
| | Section | | Office of |
| | Ministry/ Department | | Subject |
| | Office of | | Sub-Subject |
| | Subject Description | | Date & time of creation |
| | Sub Subject | | Created by |
| | Priority/ Urgency | | Remark (if any) |
| | Remarks | | Retention period |
| | Due Date | | Classification/Categorization |
| | Classification/Categorization | | |

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