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I. Login

- Enter the Username and Password in the eOffice portal, as shown in Fig.1:

![Fig.1](image1)

- Click Login button to submit the details, if the Username and Password correctly match then the user is successfully logged in to the eOffice portal and following screen appears (as shown in Fig.2):

![Fig.2](image2)

- To open the Master Data Management Module click on the link mentioned in the right panel as highlighted in Fig.2, as result of which following home screen appears through which the Admin can log into the Master Data Management Module (Fig.3):
II. Master Data Management Module

Master Data Management Module comprises of 36 different sections:

- Basic Head
- Primary Head
- Secondary Head
- Tertiary Head
- File Code
- File Head Mapping
- Confidentiality
- Correspondence Mode
- Correspondence Type
- VIP
- Draft Nature
- Draft Prefix
- Draft Reply Type
- Language
- Subject Category
- Subject Sub Category
- Category Mapping
- Ministry
- Department
- Country
- State
- Action
- Priority
- Postal Mode
- Delivery Person
- Template
- Delegation File Head Mapping
- Delegation
- Record Room
- Department Mapping
- Block Storage
- Room Storage
- Rack Storage
- Shelve Storage
III. Categorization of the links

Based on the usability above mentioned links has been categorized as follows:

1. Diary Master
2. Communication Detail Master
3. Subject Master
4. File Heads Master
5. Record Room Master
6. Miscellaneous

Let’s have a quick overview of the different sections one by one.

1. Diary Master
Diarization Master includes the following links which contains the Meta data to be used at user level.

1.1 Confidentiality
1.2 Language
1.3 Correspondence Mode
1.4 Correspondence Type
1.5 VIP
1.6 Draft Nature
1.7 Draft Prefix
1.8 Draft Reply Type

1.1 Confidentiality

- This facilitates the Admin to View the Meta data values populating through ‘Confidentiality’ dropdown field in ‘Receipt/File Creation’ page of File Management System.
- These values are used to categorize the incoming DAKs/TAPALs/LETTERs at the time of Diarization or creation of DFAs as per their classified nature.

1.1.1 View Confidential Type:

To view the Confidentiality type, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Diary Master’ ➔ Click on ‘Confidentiality’, see Fig.4
2. As a result Confidential Type List appears as shown in Fig.5

![Confidential Type List](image)

**Fig.5**

1.1.2 Search Confidentiality:

To search the Confidentiality type, perform the following Steps:

1. Login to Master Data Management → Go to ‘Diary Master’ → Click on ‘Confidentiality’ → Enter the text which needs to be searched in ‘Search’ text box, see Fig.6

![Search Confidentiality](image)

**Fig.6**

1.2 Language

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Language’ dropdown field in ‘Receipt Diary’ and ‘DFA creation’ page of File Management System.
- These values identify the Language of Incoming DAKs/TAPALs/LETTERs received during Diarization or creation of DFAs.

1.2.1 View Language:

To view the Language type, perform the following Steps:

1. Login to Master Data Management → Go to ‘Diary Master’ → Click on ‘Language’, see Fig.7
2. As a result Language List appears as shown in Fig.8

![Fig.7](image_url)

![Fig.8](image_url)

1.2.2 Search Language:

To search the Language, perform the following Steps:

1. Login to Master Data Management → Go to ‘Diary Master’ → Click on ‘Language’ → Enter the text which needs to be searched in ‘Search’ text box, see Fig.9

![Fig.9](image_url)
1.3 Correspondence Mode

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Correspondence Mode’ dropdown field in ‘Receipt Diary’ page of File Management System.
- These values identify the mode of delivery for incoming DAKs/TAPALs/LETTERs received.

1.3.1 Add New Correspondence Mode:

For adding a new Correspondence Mode, perform the following Steps:

1. Login to Master Data Management Module ➔ Go to ‘Diary Master’ ➔ Click on ‘Correspondence Mode’, as shown in Fig.10

2. As a result Correspondence Mode List appears as shown in Fig.11
3. Click on ‘Add Correspondence Mode’, as shown in Fig.12

![Fig.12](image)

4. Enter the **Correspondence Mode Description** and **Name** then click on **Save** button, as shown in the below Figure.

![Fig.13](image)

5. After clicking on ‘Save’ button, new Correspondence Mode will be added to the list and confirmation message will be appeared as shown in Fig.14

![Fig.14](image)
1.3.2 **Edit Existing Correspondence Mode List:**

To modify the existing Correspondence Mode, perform the following Steps:

1. Login to **Master Data Management Module** ➔ Go to ‘Diary Master’ ➔ Click on ‘Correspondence Mode’ ➔ Click on ‘Edit’ icon, see Fig.15

   ![Fig.15](image)

2. Edit the **Mode Description** and **Name** as required and click on **save** button.
3. After saving the modified record, confirmation message will appear as shown in **Fig.17**

   ![Fig.17](image)

1.3.3 **Delete Correspondence Mode**

To delete the existing Correspondence Mode, perform the following Steps:

1. Login to **Master Data Management Module** ➔ Go to ‘Diary Master’ ➔ Click on ‘Correspondence Mode’ ➔ Click on ‘Delete’ icon, see **Fig.18**

   ![Fig.18](image)
2. As shown in Fig.19, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Correspondence Mode will be deleted and confirmation message will be displayed as shown in Fig.20

Note:
- Correspondence Mode can’t be deleted if any Receipt is created corresponding to that Correspondence Mode.
- Modified Correspondence Mode cannot be reflected in the existing Receipts.

1.4 Correspondence Type

- This facilitates the Admin to View or Search the Meta data values populating through ‘Correspondence Type’ dropdown field in ‘Receipt Diary’ page of File Management System.
- These values identify the type of letter received viz. DO, OM, Acknowledgement etc.

1.4.1 View Correspondence Type:

To View the Correspondence Type, perform the following Steps:
1. Login to Master Data Management → Go to ‘Diary Master’ → Click on ‘Correspondence Type’, as shown in Fig.21
2. As a result Correspondence Type List appears as shown in Fig.22

![Correspondence Type List](image)

**Fig.22**

### 1.4.2 Search the Correspondence Type:

To search the Correspondence Type, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Diary Master’ ➔ Click on ‘Correspondence Type’ ➔ Enter the text which needs to be searched in ‘Search’ text box, see Fig.23

![Search the Correspondence Type](image)

**Fig.23**
1.5 VIP

- This facilitates the Admin to View or Search the Meta data values populating through ‘VIP Type’ dropdown field in ‘Receipt Diary’ page of File Management System.
- These values identify VIP-Type from where the DAKs/TAPALs/LETTERs has been received. EX- MLA, MP, MLC etc.

1.5.1 View VIP:

To View the VIP, perform the following Steps:
1. Login to Master Data Management ➔ Go to ‘Diary Master’ ➔ Click on ‘VIP’, as shown in Fig.24

3. As a result VIP List appears as shown in Fig.25
1.5.2 **Search the VIP:**

To search the VIP Type, perform the following Steps:

1. Login to **Master Data Management**→ Go to ‘Diary Master’→ Click on ‘VIP’→ Enter the text which needs to be searched in ‘Search’ text box, see Fig. 26

![VIP List Table](image)

Fig. 26

1.6 **Draft Nature**

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘DRAFT NATURE’ dropdown field in ‘DFA Creation’ page of File Management System.
- The values define the nature of DFA being prepared viz. Acknowledgement, GO, DO Letter etc.

1.6.1 **Add a new Draft Nature Value:**

To add the new DRAFT NATURE value, perform the following Steps:

1. Login to **Master Data Management**→ Go to ‘Diary Master’→ Click on ‘DRAFT NATURE’, as shown in Fig. 27

![Draft Nature Add](image)

Fig. 27
2. As a result DRAFT NATURE List appears as shown in Fig.28

![Draft Nature List](image)

Fig.28

3. Click on ‘Add Draft Nature’, as shown in Fig.29

![Draft Nature List](image)

Fig.29

4. Choose the **Draft Reply Type** and enter the **Name** then click on **Save** button, as shown in the below Figure.

![Add/Edit Draft Nature](image)

Fig.30
5. After clicking on ‘Save’ button, new Draft Nature value will be added to the list and confirmation message will be appeared as shown in Fig.31

![Fig.31](image)

1.6.2 Edit Existing Draft Nature List:

To modify the existing Draft Nature List, perform the following Steps:

1. Login to Master Data Management Module → Go to ‘Diary Master’ → Click on ‘Draft Nature’ → Click on ‘Edit’ icon, see Fig.32

![Fig.32](image)

2. Edit the Draft Reply Type and Name as required and click on save button.
3. After saving the modified record, confirmation message will appear as shown in Fig.33

![Fig.33](image)
1.6.3 **Delete Draft Nature Value**

To delete the existing Draft Nature value, perform the following steps:

1. Login to Master Data Management Module → Go to ‘Diary Master’ → Click on ‘Draft Nature’ → Click on ‘Delete’ icon, see Fig.34
2. As shown in Fig.35, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Draft Nature value will be deleted and confirmation message will be displayed as shown in Fig.36

<table>
<thead>
<tr>
<th>Note:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Draft Nature value can’t be deleted if any DFA is created corresponding to Draft Nature value.</td>
</tr>
<tr>
<td>• Modified Draft Nature value cannot be reflected in the existing DFAs.</td>
</tr>
</tbody>
</table>

1.7 Draft Prefix

➢ This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Draft Prefix’ dropdown field in ‘DFA Creation’ page of File Management System.
➢ The values identify the defined prefix used as per Draft Nature for DFA Creation.

1.7.1 Add a new Draft Prefix Value:

To add the new Draft Prefix value, perform the following Steps:
1. Login to Master Data Management ➔ Go to ‘Diary Master’ ➔ Click on ‘Draft Prefix’, as shown in Fig.37

![Fig.37]

2. As a result Draft Prefix List appears as shown in Fig.38
3. Click on ‘Add Draft Prefix’, as shown in Fig.39

![Draft Prefix List](image)

Fig.38

4. Choose the ‘Draft Nature’ and enter the name of the prefix, then click on ‘Save’ button, see Fig.40

![Add/Edit Draft Prefix](image)

Fig.40

5. After clicking on ‘Save’ button, new value will be added to the list and confirmation message will be appeared as shown in Fig.41
1.7.2 **Edit Existing Draft Prefix List:**

To modify the existing Draft Nature List, perform the following Steps:

1. Login to **Master Data Management Module** ➔ Go to ‘Diary Master’ ➔ Click on ‘Draft Prefix’ ➔ Click on ‘Edit’ icon, see Fig.42

2. Edit the **Draft Nature** and **Name** as required and click on **save** button.
3. After saving the modified record, confirmation message will appear as shown in Fig.43

1.7.3 **Delete Draft Prefix Value**

To delete the existing Draft Nature value, perform the following Steps:

1. Login to **Master Data Management Module** ➔ Go to ‘Diary Master’ ➔ Click on ‘Draft Prefix’ ➔ Click on ‘Delete’ icon, see Fig.44
As shown in Fig.45, Confirmation pop up will appear. Click on ‘Ok’ button.

Selected Draft Nature value will be deleted and confirmation message will be displayed as shown in Fig.46.

**Note:**
- Draft Prefix value can’t be deleted if any DFA is created corresponding to Draft Prefix value.
- Modified Draft Prefix value cannot be reflected in the existing DFAs.

- This facilitates the Admin to View or Search the Meta data values populating through ‘Draft Reply Type’ dropdown field in ‘DFA creation’ page of File Management System.
- The values define the type of Reply during DFA Creation; viz. Reply, New/Fresh, Reminder.

### 1.8.1 View Draft Reply Type:

To View the Draft Reply Type, perform the following Steps:

1. Login to **Master Data Management** → Go to ‘Diary Master’ → Click on ‘Draft Reply Type’, as shown in Fig.47.
2. As a result Draft Reply Type List appears as shown in Fig.48

![Draft Reply Type List](image)

**Fig.48**

1.8.2 *Search the Draft Reply Type:*

To search the Draft Reply Type, perform the following Steps:

1. Login to **Master Data Management** → Go to ‘Diary Master’ → Click on ‘Draft Reply Type’ → Enter the text which needs to be searched in ‘Search’ text box, see Fig.49

![Draft Reply Type List](image)

**Fig.49**
2. Communication Detail Master

Communication Master includes the following links which contains the Meta data to be used at user level.

- 2.1 Ministry
- 2.2 Department
- 2.3 Country
- 2.4 State

2.1 Ministry

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Ministry’ dropdown field in ‘Receipt Diary’ and ‘File Creation’ page of File Management System.
- These values identify the name of ministry from/to whom DAKs/LETTERs/TAPAL’s has been received/to be sent.

2.1.1 Add New Ministry:

For adding a new Ministry, perform the following steps:

1. Login to Master Data Management → Go to ‘Communication Detail Master’ → Click on ‘Ministry’, see Fig.50

![Fig.50](image)

2. As a result Ministry List appears as shown in Fig.51

![Fig.51](image)
3. Click on ‘Add Ministry’ in Ministry List page, as shown in Fig.51

4. Enter the Ministry Name and Code then click on Save button, see below Fig.52

5. After clicking on ‘Save’ button, new Ministry will be added to the list and confirmation message will be appeared as shown in Fig.53

2.1.2 Edit Existing Ministry List:

To modify the existing Ministry, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Communication Detail Master’ ➔ Click on ‘Ministry’ ➔ Click on ‘Edit’ icon, see Fig.54

2. Edit the Ministry Description and Name as required and click on Save button.
3. After saving the modified record, confirmation message will appear as shown in Fig. 55

![Ministry List](image)

**Fig. 55**

### 2.1.3 Delete Ministry

To delete the existing Ministry, perform the following steps:

1. Login to Master Data Management \(\rightarrow\) Go to ‘Communication Detail Master’ \(\rightarrow\) Click on ‘Ministry’ \(\rightarrow\) Click on ‘Delete’ icon, see Fig. 56

![Ministry List](image)

**Fig. 56**

2. As shown in Fig. 57, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Ministry will be deleted and confirmation message will be displayed as shown in Fig. 58

![Confirmation Pop up](image)

**Fig. 57**

![Confirmation Message](image)

**Fig. 58**

### Note:
- Ministry can’t be deleted if any Receipt/File is created corresponding to that Ministry.
- Modified Ministry cannot be reflected in the existing Receipts/Files.
2.2 Department

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Department List’ dropdown field in ‘Receipt Diary’ and ‘File Creation’ page of File Management System.
- These values identify the department within the ministry from/to whom DAKs/LETTERs/TAPAL's has been received/to be sent.

2.2.1 Add New Department:

For adding a new Department, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Communication Detail Master’ ➔ Click on ‘Department’, see Fig.59

2. As a result Department List appears as shown in Fig.60

3. Choose the Ministry, enter the Department Name and code, then click on Save button, see below Fig.

4. After clicking on ‘Save’ button, new Department List will be added to the list and confirmation message will be appeared as shown in Fig.62
2.2.2 Edit Existing Department:

To modify the existing Department, perform the following steps:
1. Login to Master Data Management → Go to ‘Communication Detail Master’ → Click on ‘Department’ → Click on ‘Edit’ icon, see Fig.63

![Fig.63](image1)

2. Edit the Ministry, Name and Code as required and click on Save button.
3. After saving the modified record, confirmation message will appear as shown in Fig.64

![Fig.64](image2)

2.2.3 Delete Department

To delete the existing Department, perform the following steps:
1. Login to Master Data Management → Go to ‘Communication Detail Master’ → Click on ‘Department’ → Click on ‘Delete’ icon, see Fig.65

![Fig.65](image3)

2. As shown in Fig.66, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Department List will be deleted and confirmation message will be displayed as shown in Fig.67

![Fig.67](image4)
2.3 Country

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Country’ dropdown field in ‘Receipt Diary’ and ‘DFA creation’ page of File Management System.
- These values identify the name of country for communication details.

2.3.1 Add New Country:

For adding a new Country, perform the following Steps:

1. Login to Master Data Management → Go to ‘Communication Detail Master’ → Click on ‘Country’, see Fig.68

![Fig.68]

2. As a result Country List appears as shown in Fig.69

![Fig.69]

Note:
- Department can’t be deleted if any Receipt/File is created corresponding to that Department.
- Modified Department cannot be reflected in the existing Receipts/Files.
3. Click on ‘Add Country’ in Country List page, as shown in Fig.70
4. Enter the Country Name and Code then click on Save button, see below Fig.71

![Fig.71](image1)

![Fig.72](image2)

5. After clicking on ‘Save’ button, new Country will be added to the list and confirmation message will be appeared as shown in Fig.72

2.3.2 Edit Existing Country List:

To modify the existing Country, perform the following Steps:

1. Login to Master Data Management → Go to ‘Communication Detail Master’ → Click on ‘Country’ → Click on ‘Edit’ icon, see Fig.73

![Fig.73](image3)

2. Edit the Country Description and Name as required and click on Save button.
3. After saving the modified record, confirmation message will appear as shown in Fig.74

![Fig.74](image4)
### 2.3.3 Delete Country

To delete the existing Country, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Communication Detail Master’ ➔ Click on ‘Country’ ➔ Click on ‘Delete’ icon, see Fig. 75

![Fig. 75](image)

2. As shown in Fig. 76, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Country will be deleted and confirmation message will be displayed as shown in Fig. 77

![Fig. 76](image) ![Fig. 77](image)

**Note:**
- Country can’t be deleted if any Receipt/DFA is created corresponding to that Country.
- Modified Country cannot be reflected in the existing Receipts/DFA.

### 2.4 State

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘State’ dropdown field in ‘Receipt Diary’ and ‘File Creation’ page of File Management System.
- These values identify the state for the selected Country for communication details.

#### 2.4.1 Add New State:

For adding a new State, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Communication Detail Master’ ➔ Click on ‘State’
2. As a result State List appears as shown in Fig. 79

![State List](image1)

3. Choose the Country, enter the State Name and code, then click on Save button, see below Fig.

![Add State](image2)

![Successfully Added](image3)

4. After clicking on ‘Save’ button, new State List will be added to the list and confirmation message will be appeared as shown in Fig. 81

2.4.2 Edit Existing State:

To modify the existing State, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Communication Detail Master’ ➔ Click on ‘State’ ➔ Click on ‘Edit’ icon, see Fig. 82
2. Edit the **Country**, **Name** and **Code** as required and click on **Save** button.
3. After saving the modified record, confirmation message will appear as shown in **Fig.83**

![State List](image1)

**Fig.82**

2.4.3 **Delete State**

To delete the existing State, perform the following Steps:
1. Login to **Master Data Management** ➔ Go to ‘Communication Detail Master’ ➔ Click on ‘State’ ➔ Click on ‘Delete’ icon, see **Fig.84**  

![State List](image2)

**Fig.83**

![Are you sure, you want to delete it?](image3)

**Fig.84**

2. As shown in **Fig.85**, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected State List will be deleted and confirmation message will be displayed as shown in **Fig.86**

![Are you sure, you want to delete it?](image4)

**Fig.85**

![State List](image5)

**Fig.86**
3. Subject Master

Subject Master includes the following links which contains the Meta data to be used at user level.

3.1 Subject Category
3.2 Subject Sub-Category
3.3 Category Mapping

3.1 Subject Category

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Subject Category’ dropdown field in ‘Receipt Diary’ and ‘File Creation’ page of File Management System.
- These values identify the category of the DAKs/LETTERs/TAPALs or FILE(s) during Diarization & creation of File(s) respectively.

3.1.1 Add New Subject Category:

For adding a new Subject Category, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Subject Master’ ➔ Click on ‘Subject Category ’, see Fig.88

![Fig.86](image-url)
2. As a result Subject Category List appears as shown in Fig.28. Click on ‘Add Subject Category’.

![Subject Category List](image)

Fig.89

3. Add Subject Category Name and Description and Click on Save, as shown in the below Figure.

![Add/Edit Subject Category](image)

Fig.90

4. After clicking on ‘Save’ button, new Subject Category will be added to the list and confirmation message will be appeared as shown in Fig.91

![Successfully Updated Subject Category List](image)

Fig.91
3.1.2  Edit Existing Subject Category List:

To modify the existing Subject Category, perform the following Steps:

1. Login to Master Data Management → Go to ‘Subject Master’ → Go to ‘Subject Category’ → Click on ‘Edit’ icon, see Fig.92
   
   ![Fig.92](image1)

   ![Fig.93](image2)

2. Edit the Subject Category Description and Name as required and click on Save button, See Fig.93

3. After saving the modified record, confirmation message will appear as shown in Fig.94

   ![Fig.94](image3)

3.1.3  Delete Subject Category

To delete the existing Subject Category, perform the following Steps:

1. Login to Master Data Management → Go to ‘Subject Master’ → Go to ‘Subject Category’ → Click on ‘Delete’ icon, see Fig.95

   ![Fig.95](image4)

   ![Fig.96](image5)

2. As shown in Fig.96, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Subject Category will be deleted & confirmation message will be displayed as shown in Fig.97

   ![Fig.97](image6)
3.1.4 Searching Subject Category:

To search the Subject Category, perform the following Steps:

1. Login to **Master Data Management** → Go to ‘Subject Master’ → Go to ‘Subject Category’ → Enter the text which needs to be searched in ‘Search’ text box, see Fig.98

3.2 Subject Sub Category

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Subject Sub Category’ dropdown field in ‘Receipt Diary’ and ‘File Creation’ page of File Management System.
- Further classification of category for DAKS/LETTERS/TAPALs of FILE(s) during Diarization & creation of File(s) respectively.

3.2.1 Add New Subject Sub Category:

For adding a new Subject Sub Category, perform the following Steps:

1. Login to **Master Data Management** → Go to ‘Subject Master’ → Click on ‘Subject Sub Category’, as shown in Fig.99
2. As a result data entry page of Subject Sub Category List appears as shown in Fig.100

3. Select **Subject Category** from drop down list and Enter the **Name** and **Description** of **Subject Sub Category** then click on **Save** button, see below Fig.101

4. After clicking on ‘**Save**’ button, new Subject Sub Category will be added to the list and confirmation message will be appeared as shown in Fig.102
3.2.2 **Edit Existing Subject Sub Category List:**

To modify the existing Subject Sub Category, perform the following Steps:

1. Login to Master Data Management → Go to ‘Subject Master’ → Go to ‘Subject Sub Category’ → Click on ‘Edit’ icon, see Fig.103

2. Edit the **Subject Sub Category Description** and **Name** as required and click on **Save** button, See Fig.104

3. After saving the modified record, confirmation message will appear as shown in Fig.105
3.2.3 Delete Subject Sub Category

To delete the existing Subject Category, perform the following Steps:

1. Login to Master Data Management → Go to ‘Subject Master’ → Go to ‘Subject Sub Category’ → Click on ‘Delete’ icon, see Fig.106

2. As shown in Fig.107, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Subject Sub Category will be deleted and confirmation message will be displayed as shown in Fig.108

Note:
- Subject Sub Category can’t be deleted if any Receipt is created corresponding to that Subject Sub Category.
- Modified Subject Sub Category cannot be reflected in the existing Receipts/Files.
3.2.4 Searching Subject Sub Category:

To search the Subject Sub Category, perform the following steps:
1. Login to **Master Data Management** → Go to ‘**Subject Master**’ → Go to ‘**Subject Sub Category**’ → Enter the text which needs to be searched in ‘**Search**’ text box, see Fig.109

![Fig.109](image)

3.3 Category Mapping

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Subject Sub Category’ dropdown field in ‘Receipt Diary’ and ‘File Creation’ page of File Management System.
- Mapping of available Subject Categories & Sub-Categories with identified OUs or Group of OUs to provide customized view in eFile application.

3.3.1 Add New Category Mapping:

For adding a new Category Mapping, perform the following steps:
1. Login to **Master Data Management** → Go to ‘**Subject Master**’ → Click on ‘**Category Mapping**’, as shown in Fig.110

![Fig.110](image)

2. As a result Category Mapping, List appears as shown in Fig.111. Click on ‘**Add Category Mapping**’

![Fig.111](image)
3. Select name of respective **Department** from drop down list and name of **Organization Unit** from the same department as shown in **Fig.112**

![Fig.112](image1)

4. Select **Category** from drop down list and the respective **Sub Category** as shown in **Fig.113**

![Fig.113](image2)

5. To save the **Category mapping**, Click on **Save** button as shown in **Fig.114**

![Fig.114](image3)
6. After clicking on Save button, new Category Mapping will be created and confirmation message will be displayed as shown in Fig.115

![Fig.115 Category Mapping List](image)

3.3.2 Edit Existing Category Mapping:

To modify the existing Category Mapping, perform the following steps:

1. Login to Master Data Management → Go to ‘Subject Master’ → Go to ‘Category Mapping’ → Click on ‘Edit’ icon, see Fig.116

![Fig.116 Category Mapping List](image)

2. Edit the Category from drop down as required and click on Save button, See Fig.117

![Fig.117 Category Mapping](image)

3. After saving the modified record, confirmation message will appear as shown in Fig.118

![Fig.118 Confirmation Message](image)
3.3.3 Delete Category Mapping

To delete the existing Subject Category, perform the following steps:

1. Login to Master Data Management → Go to ‘Subject Master’ → Go to ‘Category Mapping’ → Click on ‘Delete’ icon, see Fig.119

2. As shown in Fig.120, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Category Mapping will be deleted and confirmation message will be displayed as shown in Fig.121
4. File Heads Master

File Heads Master includes the following links which contains the Meta data to be used at user level.

4.1 Basic Head  
4.2 Primary Head  
4.3 Secondary Head  
4.4 Tertiary Head  
4.5 File Code  
4.6 File-Head Mapping

4.1 Basic Head

- By using this link Admin can Add/Edit or Delete the Basic Head.
- Functional Heads related to main functions of the organization.

4.1.1 Add Basic Head:

For adding a new Basic Head perform the following Steps:

1. Login to Master Data Management → Go to 'File Heads Master' → Click on 'Basic Head', see Fig.122

2. As a result page of Basic Head list appears as shown in Fig.123. To add new Basic Head, Click on 'Add Basic Head' as shown in below figure.

3. Enter the Basic Head 'Subject' and 'Code' then click on Save button, as shown in the Fig.124

4. After clicking on ‘Save’ button, new basic head will be added to the list and confirmation message will be appeared as shown in Fig.125
4.1.2 **Edit existing Basic Head:**

To modify the existing Basic Head, perform the following Steps:

1. Login to **Master Data Management** \(\rightarrow\) Go to ‘File Heads Master’ \(\rightarrow\) Go to ‘Basic Head’ \(\rightarrow\) Click on ‘Edit’ icon, see **Fig.126**

2. **Edit the Basic Head** as required and click on **Save** button, See **Fig.127**

3. After saving the modified record, confirmation message will appear as shown in **Fig.128**
4.1.3 Delete Basic Head

To delete the existing Basic Head, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘File Heads Master’ ➔ Go to ‘Basic Head’ ➔ Click on ‘Delete’ icon, as shown in Fig.129

2. As shown in Fig.130, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Basic Head will be deleted and confirmation message will be displayed as shown in Fig.131

Note:
- Same Basic Code cannot be used for multiple basic heads.
- Basic Head can’t be deleted if any File is created corresponding to that Basic Head.
- Modified Basic Head cannot be reflected in the existing Files.

4.1.4 Searching Basic Head:

To search the Basic Head, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘File Heads Master’ ➔ Go to ‘Basic Head’ ➔ Enter the text which needs to be searched in ‘Search’ text box, see Fig.132
4.2 Primary Head

- By using this link Admin can Add/Edit or Delete the Primary Head.
- Activity Heads related to the activities of each functional heads.

4.2.1 Add Primary Head:

For adding a new Primary Head perform the following Steps:

1. Login to Master Data Management → Go to ‘File Heads Master’ → Click on ‘Primary Head’, see Fig.133

![Fig.133](image)

2. As a result data entry page of Primary Head appears as shown in Fig.134. To add new Primary Head, Click on ‘Add Primary Head’ as shown in below Figure.

![Fig.134](image)

3. Select Basic head from drop down list and Enter the Primary Head ‘Subject’ and ‘Code’ then click on Save button, as shown in the below Fig.135

![Fig.135](image)
4. After clicking on ‘Save’ button, new Primary head will be added to the list and confirmation message will be appeared as shown in Fig.136

![Fig.136](image)

4.2.2 Edit existing Primary Head:

To modify the existing Primary Head perform the following Steps:

1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Primary Head’ → Click on ‘Edit’ icon, see Fig.137

![Fig.137](image)

2. Edit the Primary Head as required and click on Save button, See Fig.138

![Fig.138](image)

3. After saving the modified record, confirmation message will appear as shown in Fig.139

![Fig.139](image)
4.2.3 Delete Primary Head

To delete the existing Primary Head, perform the following Steps:
1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Primary Head’ → Click on ‘Delete’ icon, as shown in Fig.140

2. As shown in Fig.141, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Primary Head will be deleted and confirmation message will be displayed as shown in Fig.142

4.2.4 Searching Primary Head:

To search the Primary Head, perform the following Steps:
1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Primary Head’ → Enter the text which needs to be searched in ‘Search’ text box, see Fig.143

Note:
- Primary Head can’t be deleted if any file is created corresponding to that Primary Head or with the any associated Secondary Head or Tertiary Head.
- Modified Primary Head cannot be reflected in the existing files.
4.3 Secondary Head

➢ By using this link Admin can Add/Edit or Delete the Secondary Head.
➢ Aspect or Operation Heads related to aspects of operations involved in each activity heads.

4.3.1 Add Secondary Head:

For adding a new Secondary Head perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘File Heads Master’ ➔ Click on ‘Secondary Head’, see Fig.144

2. As a result data entry page of Secondary Head appears as shown in Fig.145. To add new Secondary Head, Click on ‘Add Secondary Head’.

3. Select Basic head and corresponding Primary Head from drop down list and Enter the Secondary Head ‘Subject’ and ‘Code’ then click on Save button, as shown in the below Fig.146
4. After clicking on ‘Save’ button, new Secondary head will be added to the list and confirmation message will be appeared as shown in Fig. 147

4.3.2 Edit existing Secondary Head:

To modify the existing Secondary Head perform the following Steps:

1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Secondary Head’ → Click on ‘Edit’ icon, see Fig. 148

2. Edit the Secondary Head as required and click on Save button, See Fig. 149

3. After saving the modified record, confirmation message will appear as shown in Fig. 150
4.3.3 Delete Secondary Head

To delete the existing Secondary Head perform the following Steps:
1. Login to Master Data Management ➔ Go to ‘File Heads Master’ ➔ Go to ‘Secondary Head’ ➔ Click on ‘Delete’ icon, as shown in Fig.151

2. As shown in Fig.152, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Secondary Head will be deleted and confirmation message will be displayed as shown in Fig.153

<table>
<thead>
<tr>
<th>Note:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Secondary Head can’t be deleted if any file is created corresponding to that Secondary Head or with the any associated Secondary Head or Tertiary Head.</td>
</tr>
<tr>
<td>• Modified Secondary Head cannot be reflected in the existing files.</td>
</tr>
</tbody>
</table>

4.3.4 Searching Secondary Head:

To search the Secondary Head, perform the following Steps:
1. Login to Master Data Management ➔ Go to ‘File Heads Master’ ➔ Go to ‘Secondary Head’
→ Enter the text which needs to be searched in ‘Search’ text box, see Fig.154

![Fig.154](image)

4.4 **Tertiary Head**

- By using this link Admin can Add/Edit or Delete the Tertiary Head.
- Factor Heads for factors to be taken into consideration relating to each of aspect or operation heads.

4.4.1 **Add Tertiary Head:**

For adding a new Tertiary Head perform the following Steps:

1. Login to **Master Data Management** → Go to ‘File Heads Master’ → Click on ‘Tertiary Head’, as shown in Fig.155

![Fig.155](image)

2. As a result data entry page of Tertiary Head appears as shown in Fig.156. To add new Tertiary Head, Click on ‘Add Tertiary Head’ as shown below Figure.

![Fig.156](image)

3. Select **Basic head** and corresponding **Primary Head** and **Secondary Head** from drop down list and Enter the Tertiary Head ‘Subject’ and ‘Code’ then click on **Save** button, as shown in the below Fig.157
4. After clicking on ‘Save’ button, new Tertiary Head will be added to the list and confirmation message will be appeared as shown in Fig.158

4.4.2 Edit existing Tertiary Head:

To modify the existing Tertiary Head perform the following Steps:

1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Tertiary Head’ → Click on ‘Edit’ icon, see Fig.159

2. Edit the Tertiary Head as required and click on Save button, See Fig.160
3. After saving the modified record, confirmation message will appear as shown in Fig.161

![Fig.161](Image)

4.4.3 Delete Tertiary Head

To delete the existing Tertiary Head perform the following Steps:

1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Tertiary Head’ → Click on ‘Delete’ icon, as shown in Fig.162

![Fig.162](Image)

![Fig.163](Image)

2. As shown in Fig.163, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Tertiary Head will be deleted and confirmation message will be displayed as shown in Fig.164

![Fig.164](Image)

Note:
- Tertiary Head can’t be deleted if any file is created corresponding to that Tertiary Head or with the any associated Secondary Head or Tertiary Head.
- Modified Tertiary Head cannot be reflected in the existing files.
4.4.4  Searching Tertiary Head:

To search the Tertiary Head, perform the following Steps:

1. Login to Master Data Management → Go to ‘File Heads Master’ → Go to ‘Tertiary Head’
   → Enter the text which needs to be searched in ‘Search’ text box, see Fig.165

![Fig.165](image)

4.5  File Code

- By using this link Admin can Add/Edit or Delete the File Code.
- Abbreviated Code for the Section pertaining to the File-Creation.

4.5.1  Add File Code:

For adding a new File Code, use the following Steps:

1. Login to Master Data Management → Go to ‘File Head Master’ → Click on ‘File Code’, as shown in Fig.166

![Fig.166](image)

2. As a result page of File Code List appears as shown in Fig.167. Click on ‘Add File Code’ to enter the new File code.

![Fig.167](image)
3. Select the respective **Organization Unit Name** to which **File Code** needs to be assigned, enter the **File code** then click on **Save** button, as shown in **Fig.168**

![Add/Edit File Code](image)

**Fig.168**

4. After clicking on **Save** button, new File Code will be added to the list and confirmation message will be appeared as shown in **Fig.169**

![File Code List](image)

**Fig.169**

### 4.5.2 Edit existing File Code:

To modify the existing File Code, perform the following Steps:

1. Login to **Master Data Management** → Go to **File Head Master** → Click on **File Code** → Search the **File Code** which needs to be modified, as shown in **Fig.170**

![File Code List](image)

**Fig.170**

2. Click on **Edit** icon, as shown in **Fig.171**. Edit the **File Code Details** as required and click on **save** button.
After saving the modified record, confirmation message will appear as shown in Fig.172

4.5.3 Delete File Code

To delete the existing File Code, perform the following steps:
1. Login to Master Data Management → Go to ‘File Head Master’ → Click on ‘File Code’ → Search the File Code which needs to be deleted, as shown in Fig.173
2. Click on ‘Delete’ icon, as shown in Fig.174
3. As shown in Fig.175, Confirmation pop up will appear. Clicking on ‘Ok’ button, selected File Code will be deleted and confirmation message will be displayed as shown in Fig.176

<table>
<thead>
<tr>
<th>S.No</th>
<th>Global Organization Unit</th>
<th>Organization Unit</th>
<th>File Code</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>INDUSTRIES ENERGY AND LABOUR</td>
<td>Search Organization Unit</td>
<td>1</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>2</td>
<td>RURAL DEVELOPMENT AND WATER CONSERVATION</td>
<td>Search Organization Unit</td>
<td>Accounts Yojana 2(RDD)</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
</tbody>
</table>

Fig.176

**Note:**
- File Code can’t be deleted if any file is created corresponding to that File Code.
- Modified File Code cannot be reflected in the existing files.
- Same File Code can be assigned to Multiple Organization Units.
- Multiple File Codes can be assigned to Single Organization Unit.

4.6 Retention Category

- The values displayed in this Master will be used for specifying the File Category details at the time of recording of Files in e-RMS Module by referring to the Record Retention Schedule which contains what kind of record should be kept for what duration.
- Based on the available storage facilities in the department this value needs to be chosen while entering the other Recording details.

4.6.1 View the list of Retention Category:

To view the Retention Category List, perform the following Steps:

1. Login to Master Data Management → Go to ‘Record Room Master’ → Click on ‘Retention Category’, see Fig.177
2. As a result List of Retention Category will be displayed as shown in Fig.178.

4.6.2 Search the Existing value of ‘Retention category’

To search the existing Retention Category value, perform the following Steps:
1. Master Data Management → Go to ‘Record Room Master’ → Click on ‘Retention Category’, see Fig.179

2. As a result List of Retention Category will be displayed as shown in Fig.180
3. Enter the text which needs to be searched in ‘Search’ text box as shown in Fig.181

4.7 File Head Mapping

- Using this link Administrator is able to map the File Heads with the Group.
- Mapping of available File-Heads with identified OUs or Group of OUs to provide customized view in eFile application.

4.7.1 Add File Head Mapping:

For adding a new File Head Mapping, perform the following steps:

1. Login to Master Data Management → Go to ‘File Head Master’ → Click on ‘File-Head Mapping’, see Fig.182
2. As a result **File Head Mapping List** will appear as shown in Fig. 183. Click on ‘Add File-Head Mapping’.

3. Choose the Department and Organization Unit to which File Heads needs to be mapped, as shown in Fig.184

4. Select the required element from the ‘Available’ list and click on forward arrow to transfer in the ‘Selected’ list, as shown in Fig.184

5. Select the File Heads which needs to be mapped with the selected Organization Unit and Department, as shown in Fig.184
6. After clicking on ‘Save’ button, new File Head Mapping will be created and added to the list and then confirmation message will be appeared as shown in Fig. 185.

![Fig. 185](image.png)

### 4.7.2 Edit Existing Group Name:

To modify the existing Group, perform the following Steps:

1. Login to Master Data Management \(\rightarrow\) Go to ‘File Head Master’ \(\rightarrow\) Click on ‘File-Head Mapping’ \(\rightarrow\) Click on ‘Edit’ icon, see Fig. 186

![Fig. 186](image.png)
2. Edit the **File Head Mapping** details, as required and click on **Save** button.
3. After saving the modified record, confirmation message will appear as shown in **Fig.187**

![Fig.186](image1)

**Fig.186**

![Fig.187](image2)

**Fig.187**

4.7.3 **Delete File Head Mapping**

To delete the existing File Head Mapping, perform the following Steps:
1. Login to **Master Data Management** → Go to ‘**File Head Master**’ → Click on ‘**File-Head Mapping**’ → Click on ‘**Delete**’ icon, see **Fig.188**

![Fig.188](image3)

**Fig.188**

![Fig.189](image4)

**Fig.189**

2. As shown in **Fig.189**, Confirmation pop up will appear. Click on ‘**Ok**’ button.
3. Selected File Head Mapping will be deleted and confirmation message will be displayed as shown in **Fig.190**

![Fig.190](image5)

**Fig.190**
5. Record Room Master

Record Room Master includes the following links which contains the Meta data to be used at user level.

- 5.1 Record Room
- 5.2 Department Mapping
- 5.3 Block Storage
- 5.4 Room Storage
- 5.5 Rack Storage
- 5.6 Shelve Storage

Values entered in the above mentioned masters will be reflected and used in e-RMS module.

5.1 Record Room

- Facilitates to enter the Master Entry for Record-Rooms available within a particular instance. These Record Room details will be used for Specifying the storage details for the recording of File in e-RMS Module
- Based on the available storage facilities in the department this value needs to be entered.

5.1.1 Add new values of Room:

To add the new Room, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Record Room Master’ ➔ Click on ‘Record Room’, see Fig.191

2. Click on ‘Add Record Room’ link as shown in Fig.192.
3. As a result data entry page for adding a Record Room value will be appeared as shown in Fig.193

4. Enter the ‘Access Role’, ‘Code’ & ‘Description’. Then click on ‘Save’ button.

5. After clicking on Save button, confirmation message pop-up will be displayed, as shown in Fig.194

5.1.2 Edit the Existing value of ‘Record Room’

To modify the existing Record Room details, perform the following Steps:

1. Master Data Management ➔ Go to ‘Record Room Master’ ➔ Click on ‘Record Room’ ➔ Click on ‘Edit’ icon, see Fig.195

**NOTE #01:** “Access Role” value from the “Record Room” Master is to be used in “Application Management System (ADMIN)” module.

**NOTE #02:** Additional Module & Sub-module has to be created by the name of “RMS” in the “ADMIN” module with creation of new Role(s) as per information available for Access Role(s) in MDM.
2. Edit the details as required and click on Save button, as shown in Fig. 196

3. After saving the modified record, confirmation message will appear as shown in Fig. 197

5.1.3 Delete Record Room

To delete the existing Record Room details, perform the following steps:
1. Master Data Management → Go to ‘Record Room Master’ → Click on ‘Record Room’ → Click on ‘Delete’ icon, see Fig. 198
4. As shown in Fig.199, Confirmation pop up will appear. Click on ‘Ok’ button.
5. Selected Record Room will be deleted and confirmation message will be displayed as shown in Fig.200

5.2 Department Mapping

- This Master provides the interface for mapping of available departments in the instance with the available Record-Room(s).
- Based on the actual storage to be provided as per the available storage facilities in the department this value needs to be entered.

5.2.1 Add new Department-Mapping:

To add the new Department mapping details, perform the following Steps:
1. Login to Master Data Management → Go to ‘Record Room Master’ → Click on ‘Department’, see Fig.201
2. Click on ‘Add Department Mapping’ link as shown in Fig.202

3. As a result data entry page for adding Department Mapping details will be appeared as shown in Fig.203

4. Select ‘Record Room’ and ‘Department’. Then click on ‘Save’ button.
5. After clicking on Save button, confirmation message pop-up will be displayed, as shown in Fig.204
5.2.2 Edit the Existing mapping of 'Department'

To modify the existing mapping of ‘Department’, perform the following Steps:

1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Department’ → Click on ‘Edit’ icon, see Fig.205

2. Edit the details as required and click on Save button, as shown in Fig.206

3. After saving the modified record, confirmation message will appear as shown in Fig.207

5.2.3 Delete Department Mapping

To delete the existing mapping details, perform the following Steps:

1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Department’ → Click on ‘Delete’ icon, see Fig.208
2. As shown in Fig.209, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Department Mapping will be deleted and confirmation message will be displayed as shown in Fig.210

![Fig.208](image)

![Fig.209](image)

![Fig.210](image)

**Note:**
- Department can’t be deleted if any File is recorded using the Record Room mapped with the same department.
- Modified details of Department cannot be reflected in the already Recorded Files.

5.3 Block Storage

- The values entered in this Master will be used for specifying the Storage structure Master for keeping records in a Record-Room.
- Based on the available storage facilities in the department this value needs to be entered.

5.3.1 Add new values of Block:

To add the new Block, perform the following Steps:
1. Login to **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Block’, see Fig.211
2. Click on ‘Add Block’ link as shown in Fig.212.

3. As a result data entry page for adding a Block value will be appeared as shown in Fig.213

4. Select ‘Record Room’ and enter the ‘Block No.’ & ‘Description’. Then click on ‘Save’ button.
5. After clicking on Save button, confirmation message pop-up will be displayed, as shown in Fig.214

5.3.2 Edit the Existing value of ‘Block’

To modify the existing Postal Mode, perform the following Steps:
1. Master Data Management  Go to ‘Record Room Master’  Click on ‘Block’  Click on ‘Edit’ icon, see Fig.215
2. Edit the details as required and click on Save button, as shown in Fig.216

3. After saving the modified record, confirmation message will appear as shown in Fig.217
5.3.3 Delete Block

To delete the existing Block, perform the following Steps:
1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Block’ → Click on ‘Delete’ icon, see Fig.218

![Fig.218](image)

2. As shown in Fig.219, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Block will be deleted and confirmation message will be displayed as shown in Fig.220

![Fig.219](image)

![Fig.220](image)

**Note:**
- If there is no concept of Block Storage to be used by Department then in MDM, need to enter the block value as ‘Default’ by department.
- Block can’t be deleted if any File is recorded corresponding to that Block.
- Modified Block cannot be reflected in the already Recorded Files.

5.4 Room Storage

- The values entered in this Master will be used for specifying the storage details for the recording of Files in e-RMS Module.
- Based on the available storage facilities in the department this value needs to be entered.
5.4.1 **Add new values of Room:**

To add the new Room, perform the following Steps:

1. Login to **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Room’, see Fig.221

![Fig.221](image)

2. Click on ‘Add Room’ link as shown in Fig.222.

![Fig.222](image)

3. As a result data entry page for adding a Room value will be appeared as shown in Fig.223

![Fig.223](image)
4. Select ‘Record Room’ & ‘Block No’ and enter the ‘Room No.’ & ‘Description’. Then click on ‘Save’ button.

5. After clicking on Save button, confirmation message pop-up will be displayed, as shown in Fig.224

![Fig.224](image)

5.4.2 *Edit the Existing value of ‘Room’*

To modify the existing Postal Mode, perform the following Steps:

1. **Master Data Management** ➔ ‘Record Room Master’ ➔ Click on ‘Room’ ➔ Click on ‘Edit’ icon, see Fig.225

![Fig.225](image)

2. Edit the details as required and click on Save button, as shown in Fig.226

![Fig.226](image)

3. After saving the modified record, confirmation message will appear as shown in Fig.227

![Fig.227](image)
5.4.3 Delete Room

To delete the existing Room, perform the following Steps:

1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Room’ → Click on ‘Delete’ icon, see Fig.228

2. As shown in Fig.228, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Room will be deleted and confirmation message will be displayed as shown in Fig.229
The values entered in this Master will be used for specifying the actual storage details for the recording of Files in e-RMS Module.

Based on the actuals storage to be provided as per the available storage facilities in the department this value needs to be entered.

5.5.1 Add new values of Rack:

To add the new Rack, perform the following Steps:

1. Login to Master Data Management → Go to ‘Record Room Master’ → Click on ‘Rack’, see Fig.230
2. Click on ‘Add Rack’ link as shown in Fig.231.

![Fig.231](image)

3. As a result data entry page for adding a Rack value will be appeared as shown in Fig.232

![Fig.232](image)

4. Select ‘Record Room’, ‘Block No.’ & ‘Room No.’ and enter the ‘Rack No.’ & ‘Description’. Then click on ‘Save’ button.

5. After clicking on Save button, confirmation message pop-up will be displayed, as shown in Fig.233

![Fig.233](image)
5.5.2  

*Edit the Existing value of 'Rack'*

To modify the existing Postal Mode, perform the following Steps:

1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Rack’ → Click on ‘Edit’ icon, see Fig.234

![Fig.234]

2. Edit the details as required and click on Save button, as shown in Fig.235

![Fig.235]

3. After saving the modified record, confirmation message will appear as shown in Fig.236

![Fig.236]
5.5.3 Delete Rack

To delete the existing Rack, perform the following steps:

1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Rack’ → Click on ‘Delete’ icon, see Fig.237

   ![Fig.237](image)

   Fig.237

2. As shown in Fig.238, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Rack will be deleted and confirmation message will be displayed as shown in Fig.239

   ![Fig.240](image)

   Fig.240

   ![Fig.241](image)

   Fig.241

   **Note:**
   - Rack can’t be deleted if any File is recorded corresponding to that Rack.
   - Modified Rack No. cannot be reflected in the already Recorded Files.

5.6 Shelve Storage

➤ The values entered in this Master will be used for specifying the actual storage details for the recording of Files in e-RMS Module.
Based on the actuals storage to be provided as per the available storage facilities in the department this value needs to be entered.

5.6.1 Add new values of Shelve:

To add the new Shelve, perform the following steps:

1. Login to Master Data Management → Go to ‘Record Room Master’ → Click on ‘Shelve’, see Fig.242

![Fig.242](image1)

2. Click on ‘Add Shelve’ link as shown in Fig.243

![Fig.243](image2)

3. As a result data entry page for adding a Shelve value will be appeared as shown in Fig.244

![Fig.244](image3)
4. Select ‘Record Room’, ‘Block No.’, ‘Room No.’ & ‘Rack No.’ and enter the ‘Shelve No.’ & ‘Description’. Then click on ‘Save’ button.
5. After clicking on Save button, confirmation message pop-up will be displayed, as shown in Fig.245

![Fig.245]

5.6.2 Edit the Existing value of ‘Shelve’

To modify the existing Shelve details, perform the following Steps:
1. Master Data Management → Go to ‘Record Room Master’ → Click on ‘Shelve’ → Click on ‘Edit’ icon, see Fig.246

![Fig.246]

2. Edit the details as required and click on Save button, as shown in Fig.247

![Fig.247]

3. After saving the modified record, confirmation message will appear as shown in Fig.248
5.6.3 **Delete Shelve**

To delete the existing Shelve, perform the following Steps:

1. **Master Data Management** → Go to ‘Record Room Master’ → Click on ‘Shelve’ → Click on ‘Delete’ icon, see Fig.249

![Fig.249](image)

2. As shown in Fig.250, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Shelve will be deleted and confirmation message will be displayed as shown in Fig.251

![Fig.250](image)

![Fig.251](image)
6. Miscellaneous
Miscellaneous Master includes the following links which contains the Meta data to be used at user level.

- 6.1 Action
- 6.2 Priority
- 6.3 Postal Mode
- 6.4 Delivery Person
- 6.5 Delegation File Head
- 6.6 Delegation Mapping

6.1 Action

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Action’ dropdown field in ‘Send’ screen of Receipt/File in File Management System.
- Nature of actions demarcated for next recipient at the time of sending of File(s)/Receipt(s).

6.1.1 Add New Action:

For adding a new Action, perform the following Steps:

1. Login to Master Data Management ➔ Go to ‘Miscellaneous’ ➔ Click on ‘Action’, see Fig.252

![Fig.252](image)

2. As a result Action List appears as shown in Fig.253
3. Enter the **Action Type** and **Description**, then click on **Save** button, see below **Fig.254**

4. After clicking on ‘Save’ button, new Action value will be added to the list and confirmation message will be appeared as shown in **Fig.255**

**6.1.2 Edit Existing Action:**

To modify the existing Action, perform the following Steps:

1. Login to Master Data Management→ Go to ‘Miscellaneous’→ Click on ‘Action’→Click on ‘Edit’ icon, see **Fig.256**

2. Edit the **Action Type** and **Description** as required and click on **Save** button.
3. After saving the modified record, confirmation message will appear as shown in Fig.257

![Fig.257](image)

6.1.3 Delete Action

To delete the existing Action, perform the following Steps:

1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Action’ → Click on ‘Delete’ icon, see Fig.258

![Fig.258](image)

2. As shown in Fig.259, Confirmation pop up will appear. Click on ‘Ok’ button.

3. Selected Action value will be deleted and confirmation message will be displayed as shown in Fig.260

![Fig.260](image)

Note:
- Action value can’t be deleted if any Receipt/File is sent using that Action value.
- Modified Action value cannot be reflected in the existing Receipts/Files.
6.2 Priority

- This facilitates the Admin to View the Meta data values populating through ‘Priority’ dropdown field in ‘Receipt/File Send’ page of File Management System.
- These values identify the urgency of File(s)/Receipt(s) at the time of sending.

6.2.1 View Priority Type:

To view the Priority type, perform the following Steps:

1. Login to Master Data Management \(\rightarrow\) Go to ‘Miscellaneous’ \(\rightarrow\) Click on ‘Priority’, see Fig.261

![Fig.261](image)

2. As a result Priority List appears as shown in Fig.262

![Fig.262](image)

6.2.2 Search Priority:

To search the Priority value, perform the following Steps:

1. Login to Master Data Management \(\rightarrow\) Go to ‘Miscellaneous’ \(\rightarrow\) Click on ‘Priority’ \(\rightarrow\) Enter the text which needs to be searched in ‘Search’ text box, see Fig.263

![Fig.263](image)
6.3 Postal Mode

- This facilitates the Admin to Add/Edit or Delete the Meta data values populating through ‘Postal Mode’ dropdown field in ‘Draft Dispatch’ page of File Management System.
- Postal-Mode details for approved issues being dispatched.

6.3.1 Add New Postal Mode:

For adding a new Postal Mode, perform the following Steps:
1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Postal Mode’, see Fig.264

![Fig.264](image)

2. As a result Postal Mode List appears as shown in Fig.265

![Fig.265](image)

3. Enter the Postal Mode Description and Name then click on Save button, see below Figure.

![Fig.266](image) ![Fig.267](image)
4. After clicking on ‘Save’ button, new Postal Mode will be added to the list and confirmation message will be appeared as shown in Fig.267

6.3.2 Edit Existing Postal Mode:

To modify the existing Postal Mode, perform the following Steps:

1. Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Postal Mode’ → Click on ‘Edit’ icon, see Fig.268

2. Edit the Postal Mode Description and Name as required and click on Save button.
3. After saving the modified record, confirmation message will appear as shown in Fig.269

6.3.3 Delete Postal Mode

To delete the existing Postal Mode, perform the following Steps:

1. Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Postal Mode’ → Click on ‘Delete’ icon, see Fig.270

2. As shown in Fig.271, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Postal Mode will be deleted and confirmation message will be displayed as shown in Fig.272
Note:
- Postal Mode can’t be deleted if any Draft is dispatched corresponding to that Postal Mode.
- Modified Postal Mode cannot be reflected in the already dispatched Drafts.

6.4 Delivery Person

- This facilitates the Admin to Add/Edit or Delete the populating through ‘Delivery Person’ dropdown field in ‘Draft Dispatch’ page of File Management System.
- List of Dispatch-Riders for an organization to circulate issues.

6.4.1 Add New Delivery Person:

For adding a new Delivery Person, perform the following Steps:

1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Delivery Person’, see Fig.273

2. As a result Delivery Person List appears as shown in Fig.274. Click on ‘Add Delivery Person’.

3. Enter the Delivery Person Name and Code then click on Save button, see below Figure.
4. After clicking on ‘Save’ button, new Delivery Person will be added to the list and confirmation message will be appeared as shown in Fig.276

6.4.2 Edit Existing Delivery Person:

To modify the existing Delivery Person, perform the following Steps:

1. Login to Master Data Management→Go to ‘Miscellaneous’→Click on ‘Delivery Person’→Click on ‘Edit’ icon, see Fig.277

2. Edit the Delivery Person Name and Code as required and click on Save button.
3. After saving the modified record, confirmation message will appear as shown in Fig.278

6.4.3 Delete Delivery Person

To delete the existing Delivery Person, perform the following Steps:
1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Delivery Person’ → Click on ‘Delete’ icon, see Fig.279

![Fig.279](image)

2. As shown in Fig.279, Confirmation pop up will appear. Click on ‘Ok’ button.
3. Selected Delivery Person will be deleted and confirmation message will be displayed as shown in Fig.280

![Fig.279](image) ![Fig.280](image)

**Note:**
- Delivery Person can’t be deleted if any Draft is dispatched corresponding to that Delivery Person.
- Modified Delivery Person cannot be reflected in the already dispatched Drafts.

### 6.5 Delegation File Head Mapping

- This facilitates the Admin to Add/Edit or Delete the File Head Mapping assigned to the delegation.
- Due to this mapping, the person to whom the charge is delegated will be able to view only the mapped File Heads.
- Mapping of File-Heads to customized group for re-use in delegation privilege.

#### 6.5.1 Add New Delegation File Head Mapping:

For adding a new Delegation File Head Mapping, perform the following Steps:
1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Delegation File Head Mapping’, see Fig.281
2. As a result Delegation File Head Mapping List appears as shown in Fig.283.
3. Click on ‘Add Delegation File Head Mapping’.
4. Choose the Group Type, Enter the Group Name and select the File Heads which needs to be viewed and used by the delegated user. Then click on Save button, see Fig.284
5. After clicking on ‘Save’ button, new Delegation File Head Mapping will be added to the list and confirmation message will be appeared as shown in Fig.285

<table>
<thead>
<tr>
<th>S.No</th>
<th>Group name</th>
<th>Group Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Madhava</td>
<td>Custom</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ministry of Earth Sciences</td>
<td>Ministry</td>
<td></td>
</tr>
</tbody>
</table>

Fig.285

6.6.2 Edit Existing Delegation File Head Mapping:

To modify the existing Delegation File Head Mapping, perform the following Steps:
1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Delegation File Head Mapping’ → Click on ‘Edit’ icon, see Fig.286

<table>
<thead>
<tr>
<th>S.No</th>
<th>Group name</th>
<th>Group Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Madhava</td>
<td>Custom</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ministry of Earth Sciences</td>
<td>Ministry</td>
<td></td>
</tr>
</tbody>
</table>

Fig.286

2. Edit the Delegation File Head Mapping as required and click on Save button.
3. After saving the modified record, confirmation message will appear as shown in Fig.287

<table>
<thead>
<tr>
<th>S.No</th>
<th>Group name</th>
<th>Group Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>Custom</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ministry of Earth Sciences</td>
<td>Ministry</td>
<td></td>
</tr>
</tbody>
</table>

Fig.287
6.6.3 Delete Delegation File Head Mapping

To delete the existing Delegation File Head Mapping, perform the following Steps:

1. Login to Master Data Management \(\rightarrow\) Go to ‘Miscellaneous’ \(\rightarrow\) Click on ‘Delegation File Head Mapping’ \(\rightarrow\) Click on ‘Delete’ icon, see Fig.288

![Fig.288](image)

2. As shown in Fig.289, Confirmation pop up will appear. Click on ‘OK’ button.
3. Selected Delegation File Head Mapping will be deleted and confirmation message will be displayed as shown in Fig.290

![Fig.289](image)  ![Fig.290](image)

6.6 Delegation

- When the charge of any user (Delegator) is delegated to another user (Delegatee) then Administrator will be able to transfer the privileges of Delegator to Delegatee. Privileges such as mapping of File Heads, Subject Categories, VIP Types, and Classified etc. can be transferred to Delegatee.
- List of available delegations from EMD. Customizing delegation privilege as per the required scope.
- It is used to limit the scope of assigned delegation by filtering through File/Receipt Subject Categories & other available parameters.

6.6.1 Setting Delegation Privileges for File:

For setting Delegation Privileges, perform the following Steps:

1. Login to Master Data Management \(\rightarrow\) Go to ‘Miscellaneous’ \(\rightarrow\) Click on ‘Delegation’, see Fig.291
2. As a result, page of Delegation List appears as shown in Fig.292. Click on ‘Privileges’.

![Delegation List](image1)

**Fig.292**

3. As a result, page of ‘Setting Delegation Privileges’ appears as shown in Fig.293. Click on ‘File Privileges’.

![File Privileges](image2)

**Fig.293**

4. Select the required element from the ‘Available’ list and click on forward arrow to transfer in the ‘Selected’ list, as shown in Fig.294.

5. After saving the settings, selected privileges will be set for the ‘Delegatee’.
6.6.2 Setting Delegation Privileges for Receipt:

For setting Delegation Privileges, perform the following Steps:

1. Login to Master Data Management → Go to ‘Miscellaneous’ → Click on ‘Delegation’, see Fig.295

2. As a result, page of Delegation List appears as shown in Fig.296. Click on ‘Privileges’. 
3. As a result, page of ‘Setting Delegation Privileges’ appears as shown in Fig.297
4. Click on ‘Receipt Privileges’.

5. Select the required element from the ‘Available’ list and click on forward arrow to transfer in the ‘Selected’ list, as shown in Fig.298.
6. After saving the settings, selected privileges will be set for the ‘Delegatee’. 