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Introduction

Records management system deals with the files that are closed and sent for recording to the designated Record Room of the department. This manual is a set of guidelines for eFile users who will deal with the recording process and also for the Record Room staffs who will use RMS application to deal with files which have come for recording.

Note: This application is developed for recording of Physical files only.
Manual for eFile User
eFile user can do the following actions related to records management through File Management System (eFile) application.

1. Send Closed Files for recording.

2. View and take action on files Sent by Record Room in RMS Inbox.

**Send Closed Files for Recording:**

In eFile, only files closed by the logged in user will be considered for recording purpose.

The efile user can view closed files by Clicking on **Files> Closed> By me**. In the closed files list page, user can start the process of recording and send the file to Record Room by Clicking on “Record” option as shown below.

Once user clicks on Record option the following page will be displayed where user can enter all the details required for recording.
User will have to fill the mandatory metadata and then click on Submit. User can also upload any **reference document** (only pdf format up to 10 MB) giving further instructions to record room.

Once the user clicks on Submit, the file will be sent to Record Room for further processing.

The list of the sent files can be viewed by user by going to **Files>Sent** page as shown below.

Files once sent to Record Room cannot be pulled back.

**Note:** User can view the status of the sent files in Module search in File Sent Page and in Advanced Search.
View and take action on files Sent by Record Room in RMS Inbox:

Files that are sent to eFile user by the Record Room staff will be displayed in RMS Inbox module in eFile. eFile user will have to first receive the files before taking any action on them.

Files are sent from Record Room to eFile under two scenarios.

Scenario-1:
Files that are due for review are sent by Record Room to the user of the dealing section. These files will be displayed in the list with a legend “📅” for easier segregation.

Scenario-2:
Files that are returned by Record Room for various reasons (for e.g., physical file not sent to Record Room, incomplete information provided to Record Room, etc). These files are given a legend “🗑️.”
User can also use the **View menu** in menu bar to view “Returned” and “For Review” files separately.

After receiving the files in RMS Inbox, user can take three actions on the files.

**Re-record the returned file by using “Re-record” option:**

When user clicks on Re-Record option in RMS Inbox, user is redirected to “Record File” page. Here user can edit/update previous details like retention category, decision taken remarks etc. Once user clicks on Submit Button, the file is sent to Record Room for further processing.

**Note:** User can take any action like “For Recording”, Send To NAI”, “Weed Out”. 
Review the files that are due for review by using “Review” option:

When User clicks on **Review** option in RMS Inbox, user is redirected to “**Record File**” page. Here user can provide review related details.

In case after the review the file has to be retained in Record Room, then the user can select “For Recording” in “Action to be Taken” menu and edit previously set retention category and decision taken remarks.

Once user clicks on Submit button, the file will be sent to Record Room for further recording.

In case the file is not be retained in Record Room, then user can select “Send To NAI” or “Weed Out” in “Action to be Taken” menu and update decision related to the action. Once user clicks on Submit button, the file will be sent to Record Room for further action of sending the file to NAI or weeding it out.

**Note: Retention category will not be available when Action to be Taken is either “Send To NAI” or “Weed Out”**
Move the file to Closed list by using Move to Closed option:

When a file is returned from Record Room for Review or for other reasons, the file can be forwarded to concerned authority for further correction or decision making. This can be achieved by using “Move To Closed” option in the menu bar as shown below.

When user selects a file and clicks on Move To Closed option, the file is sent to Closed > By Me folder. The file can subsequently be reopened and moved forward in eFile.

Once decisions are made on the file, the file has to be closed again before it can be sent to Record Room.

User can view all the details of file and the recording details by clicking on Details option in the file listing in RMS Inbox as shown below.

Note: User can also use Advanced Search module to Receive, Re-Record and Review the files that are sent from Record Room.
Manual for Record Room User
Record Room user can do the following actions related to records management in RMS application.

1. Receive files in Inbox sent from eFile.
2. Accept received files in Inbox.
3. Return files back to eFile.
4. Send files (due for review) back to eFile.
5. Send files to NAI
6. Weed Out files.
7. Module search and advanced search

**Receive files in Inbox sent from eFile:**
Files that are sent to Record Room by eFile users are displayed in Record Room inbox.

After logging in to RMS application, home page of the application is displayed to user. User can then click on **Inbox menu** in the home page.

In inbox the user can view all the files that are sent to Record Room for further actions (recording, send to NAI, weed out). Different **legends** are provided for files to segregate them based on different action to be taken on them as shown below.

User can receive multiple files at one go by selecting check box for different files and click on **Receive** option in menu bar. A pop up window “**Receive File**” is displayed to user.
Record Room user gives remarks and clicks on OK to receive the selected file(s).

User can then take further action on the file as directed by eFile user.

In Inbox page, user can click on file number link to view the details of the action taken on the file as displayed below. User can view the file details even if the file is not received in Inbox. User can also view reference document only if it has been uploaded by the eFile user in the recording screen.
Accept received files in Inbox:
User can accept files that are received for recording by selecting the check box and click on Accept option in menu bar. A pop up window “Accepting Details” is displayed to user.

Record Room user then gives remarks and fills storage details and clicks on Accept. Once clicked on the Accept button, the file is moved from Inbox and displayed in Accepted files list as shown below.

Note: These accepted files can then either be returned to eFile or sent to eFile when due for review.
Return files back to eFile:

Record Room user can at any time return the Inbox files (received/unreceived) and Accepted files back to eFile user who had sent it to Record Room.

User can select any file from the Inbox listing or Accepted files listing and click on Return option in action menu bar. A pop up window “Return File” will be displayed to user.

Record Room user can fill Remarks and click on “Return”. Once clicked on the Return button, the file is removed from Inbox/Accepted files listing and is displayed in Sent To eFile list as shown below.

Note: If the eFile user is not available at the time of returning the file, then Record Room user will select any other user from Return To drop down menu. The users displayed in “Return To” drop down are users in the eFile section whose user had sent the file to Record Room.
Send files (due for review) to eFile:

When an accepted file is due for review based on its retention category, Record Room can send the file back to eFile user who will take care of the review process.

User can send files for review by selecting an accepted file and then clicking on **Send for Review** option in action menu bar. A pop up window “**Send for Review**” is displayed to user as shown below.

Record Room user can fill the remarks and send the file to eFile by clicking on **Send** button.

**Note:** If the eFile user is not available at the time of sending the file, then Record Room user will select any other user from Send To drop down menu.

All the files that are returned to eFile or sent to eFile for review purpose will be displayed in Sent To eFile listing. User can view the files by clicking on **Sent To eFile** option in main menu bar as shown below.

**Note:** Record Room user can differentiate between the returned file and sent files due for review by the use of legends 🔄 and 🌈 respectively.
Send Files to NAI:
When a file is no longer to be retained in Record Room and has to be sent to NAI, the efile user can select the action “Send To NAI” and send to Record Room for further action. Record Room user can view such files in inbox with a specific legend “_SENT TO NAI“.

Record Room users can send multiple files to NAI at one go. The files must be received in inbox before sending them to NAI.

User can select check box for file(s) and click on Send To NAI option in menu bar. A pop up window “Send To NAI” is displayed to user as shown below.

Record Room user can fill the remarks and send the selected file(s) to NAI by clicking on OK.

Record Room user can view the list of files sent to NAI in by clicking on Sent To NAI option in main menu bar as shown below.
**Weed Out files:**

When a file is no longer required in eFile or in Record Room, it can be weeded out. The efile user can select action “Weed Out” and send to Record Room. Record Room user can view such files in inbox with a specific legend “🗑️”.

Record Room users can weed out multiple files at one go. The files must be received in inbox before sending them to NAI.

User can select check box for file(s) and click on Weed Out option in menu bar. A pop up window “Weed Out” is displayed to user as shown below.

Record Room user can fill the remarks and weed out the selected file(s) by clicking on OK.

Record Room user can view the list of files that are weeded by clicking on **Weeded Out** option in main menu bar as shown below.
Dashboard View:
A provision to view the Pending files (for recording/for weeding/for sending to NAI) in inbox and files which are due for review has been provided via a dashboard view. When record room user logs in to RMS application, user can click on the respective section to access the pending files or the files due for review and take further action.
Module Search and Advanced Search:

Two different levels of Search mechanism has been provided in Record Room section.

Module Search:

In RMS application, a search mechanism has been provided in each of the listing pages (Inbox, Accepted, Sent To eFile, Sent to NAL, Weeded Out) for users to search the files which are currently in Record Room or files on which Record Room has taken any action.

User can search for the file by typing computer number or file number in Search box provided in the menu bar. User can also click on drop down (adjacent to search box) to view and search using different parameters as listed below.

Search parameters:

1) Date Range
2) Computer Number
3) File Number
4) Department name
5) Section Name
6) Retention Category

In addition to these fixed parameters, different filters have been provided in selective list pages (Inbox, Accepted, Sent To eFile) to enhance the search output.
**Inbox List module search:**
This search will display the files that have been sent to Record Room from eFile.

User can take help of search filters like **For Recording, For Sending to NAI** and **For Weeding Out** to segregate files which are to be stored in Record Room, sent to NAI or weeded out respectively.

Note: The Date range in Inbox module search is the time within which the files were sent from eFile to Record Room.

**Accepted Files List Module Search:**
This search will display the files that have been received and accepted by the Record Room for recording.

In addition to fixed search parameters, user can take help of search filter **Pending for Review** to view files which are due for review as shown below.

Note: The Date range in Accepted Files module search is the time within which the files were accepted in Record Room.
**Sent to eFile List module search:**
This search will display the files that have been sent back to eFile (either returned or sent for review purpose).

User can take help of search filters **Returned** and **Sent For Review** to search files which have been returned to eFile or sent to eFile for Review purpose as shown below.

![Sent to eFile List module search](image)

**Note:** The Date range in Sent To eFile module search is the time within which the files were sent to eFile from Record Room.

**Sent To NAI List module search:**
This search will display the files that have been sent to NAI by Record Room. User can search the files on the basis of different search parameters as displayed below.

![Sent To NAI List module search](image)

User cannot take any more action on files, once they are sent to NAI.

**Note:** the Date range in Sent to NAI module search is the time within which the files were sent to NAI from Record Room.
Weeded Out List module search:

This search will display the files that have been weeded out by Record Room. User can search the files on the basis of different search parameters as displayed below.

User cannot take any more action on files, once they are weeded out.

Note: The Date range in Weeded Out module search is the time within which the files were weeded out by Record Room.
Advanced Search:
An enhanced search mechanism has been provided with basic and advanced parameters to search any file that is dealt in the Record Room.

Basic Parameters:
1) Computer Number
2) File Number
3) Main Category
4) Sent From eFile (Date range of maximum one year)

In addition to these basic search parameters, different sets of advanced parameters are provided for different search tabs (Pending, Accepted, Due for Review, Sent To NAI, Weeded Out) with additional search filters for each listing as shown below.

The search output will display the basic file details like computer no., file no., subject, retention period, decision taken remarks and status. User will also be able to take further action on files by using the different Action options preceding the file details.

Search for pending files in Inbox:
User can search and segregate the files that were sent by eFile user and are pending in the inbox of Record Room. User has been provided search filters (Unreceived, UnAccepted, For Sending to NAI and Weeding Out) which can be used for an enhanced search.

User can search for pending files and from the advanced search output can take further action (Receive, Return, Accept, Send To NAI, Weed Out) on them as displayed below.
Search for Accepted Files:
User can search and segregate the files that were accepted by Record Room for recording. User has been provided advanced search parameters (Accepted Date Range, Storage Details) for enhanced search.

User can search for pending files and from the advanced search output can take further action (Return, Send for Review) on them as displayed below.
Search files that are Due for Review:
User can search and segregate the accepted files that are due for review. User has been provided an advanced search parameter (Review Due Date Range) for enhanced search.

User can search for these files and from the advanced search output can take further action (Return, Send for Review) on them as displayed below.

Search files that are Sent to NAI:
User can search files that have been sent to NAI by the Record Room. User has been provided a Date Range as advanced parameter for enhanced search as shown below.

The date range is the period in which files were sent to NAI. User cannot take any further action on the search output.
Search files that are Weeded Out:
User can search files that have been weeded out by the Record Room. User has been provided a Date Range as advanced parameter for enhanced search as shown below.

The date range is the period in which files were weeded out. User cannot take any further action on the search output.
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