



Standard Operating Process eOffice



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(eOffice Project Management Unit)
BSNL Corporate Office.**

Version/Amendment History: -

Sr. No.	Version	Date of Release	Date of Amendment	Amended By	Amendments
1.	1.0	05-08-2020			
2.	1.1	17-11-2020	11-11-2020	eOffice PMU	<ul style="list-style-type: none">• Para vi (on Page 9) in (B. File Management System) w.r.t. “Draft Approver Role” is modified as: - vi. Draft approver role: - a. For BSNL CO, Draft Approver Role in eFile will be given to the DGMs and above. b. For Circle Offices and SSAs/Field Units, Draft Approver Role will be given to the AGMs and above.
3.	1.2	08-12-2020	27-11-2020	eOffice PMU	<ul style="list-style-type: none">• Para D on Page 10 is redefined as: - <u>D. Signatures in eFile</u> i. Any file created/forwarded or any action taken by a particular user on a file in eOffice application will be deemed to have been signed by the employee himself/herself. ii. Once the draft document is approved in the system, the employee who has to sign the document shall take a print of the document, sign it by hand and then upload the same in eOffice.
4.	1.3	12-07-2021	28-06-2021	eOffice PMU	<ul style="list-style-type: none">• SOP for Invoice Management in eOffice and ERP Systems, released by MM Section, BSNL CO. (Attached as ANNEXURE)

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पी.के. पुरवार

अध्यक्ष एवं प्रबन्ध निदेशक

P.K. PURWAR

Chairman & Managing Director



Message from CMD

It gives me a great sense of pleasure to share the change in culture of BSNL Corporate Office in the past two to three months post implementation of eOffice. As envisaged, there have been significant improvements in terms of efficiencies, transparency as well as quick decision making. This implementation has helped in functioning of Corporate Office near normal even in challenging phase of Covid-19 pandemic period.

It is time for bringing this technological change throughout BSNL. Management committee has given its go ahead for rollout of eOffice on PAN India basis. It is important for all offices to follow a standard protocol, rules and policies in usage of eOffice to maintain uniformity. For that the Standard Operating Process and Policy document is a starting point.

I put on record my appreciation for the entire Recruitment Team of BSNL Corporate Office for coming up with this document that can be used throughout the Organisation for management of eOffice as well as for uniform and fast implementation on a priority project.


(Pravin Kumar Purwar)
CMD, BSNL

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अरविन्द वडनेरकर

निदेशक (एचआर)

ARVIND VADNERKAR

Director (HR)

BSNL Board



Message from Director (HR)

It gives me great satisfaction to see that the vision set by top management of BSNL for paperless BSNL has achieved its first milestone by successful implementation of eOffice at BSNL Corporate Office and Maharashtra Circle office. There have been significant changes in the way, we work now. This has made decision making quick as well as simplified since all the required information is available at a single point. This has also greatly improved transparency in file movement. During lockdown, officers worked from home and hence there was less loss of productivity during that time.

As we move towards PAN India rollout, it is important that there is a set of policies as well as Standard Operating Processes that have to be followed. Based on our learnings and experiences. This document may be updated as and when required to include any new policies or processes.

I congratulate entire Recruitment Team of BSNL Corporate Office for quickly rolling out eOffice in BSNL Corporate Office and sincerely thank them for consistently working on it and thus coming up with a SOP document on eOffice that will help BSNL become a fast, transparent, efficient and accountable Organisation.

Arvind Vadnerkar

(Arvind Vadnerkar)

DIR (HR), BSNL

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समिता लूथरा
महाप्रबंधक (भर्ती)
(Samita Luthra)
GM (Recruitment), BSNL CO




Message from GM Recruitment

BSNL had been following the conventional system of physical files for quite a long time. Looking at the problem of traditional physical system, a dire need was felt to move to a digital system. In March 2020, BSNL has started on a journey of moving its physical files into eFiles through the use of NIC software, eOffice.

eOffice has successfully passed its Phase-1 and is now into Phase-2 which aims to cover complete BSNL. The metamorphosis in work culture is being experienced by all Phase-1 eOffice users. Our endeavor should be to use this system to its highest efficiency which in turn will bring improved productivity.

SOP document has been put in place taking into consideration all experiences, learnings and recommendations from NIC. As we move forward, more learnings will come and the aim will be to keep polishing this document with effective processes. Any improvement to these policy guidelines/processes shall be adopted across BSNL with the approval of Director (HR), BSNL for purpose like improvement in system functionality, enhanced convenience to the users, data security and confidentiality, compliance of government directive and policies etc.

My heartfelt thanks to my entire team in formulating this Standard Operating Process document.


(Samita Luthra)
GM (Recruitment), BSNL CO

Preface

This document contains broad policy guidelines and Standard Operating Processes for eOffice which has been framed with an objective to help all Officers in adopting eOffice in BSNL.

eOffice has been developed by National Informatics Centre based on Central Secretariat Manual of Office Procedure of DoPT, GOI. The hardware has been hosted on BSNL IDC through cloud.

eOffice 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 diary of inward letters, creation of files, making notes and referencing, preparation of draft for approval, issue of letter, movement of receipts and files and finally the archival of records. With this system, the movement of receipts and files becomes seamless and there is more transparency in the system since each and every action taken on a file is recorded electronically. eFiles can be easily searched and retrieved and actions on them can be taken instantly. They can also link to and reference relevant files, documents, rulings and decisions. This simplifies decision making, as all the required information is available at a single point.

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Standard Operating Processes

A. Receipt (DAK Management)

- i. On receiving a fresh correspondence, either in hardcopy or softcopy, only one-time Diarization work is to be done by the employee authorized for diarizing in eOffice at the section where it is initially received and hard copy of the correspondence is to be preserved in Physical file/files. After electronic diarization of the dak, it may be sent to the addressee/concerned eOffice users through eOffice.
- ii. Typically, CR section of an office receives all physical Dak and then it is distributed further. At this point, all Dak is to be diarized and sent in eOffice to concerned user. Any closed envelope marked with 'Confidential', 'Personal', 'Secret' or 'Top Secret' is to be opened by the addressee only. Depending upon the confidentiality or secrecy, the addressee has to decide for its movement through eOffice.
- iii. Requirement of addition of new subject in 'Main Category' and its 'Sub-Subject Category' is of continuous nature. A correspondence, the subject of which does not appear in 'Main Category', should be initially diarized by selecting 'General' in 'Main Category' and after addition of the respective subject, the said receipt should be edited to keep under appropriate category head for future record.
- iv. Subject should be as per subject of correspondence.
- v. The following shall be treated as Receipt and should be sent only through eOffice amongst eOffice users: -
 - a) All official correspondence being received in hard copy or soft copy duly signed by the Sender (like

letter, meeting notice, meeting agenda, minutes of the meeting, record note of discussions, Action taken reports, Notices, Memorandum, Memo, Office orders, notifications, Work/Purchase order, RTI applications, Circulars, guidelines, reports, PQ, Application or representation by employee/Trade Union/Association etc.)

b) Scanning should be done on maximum 200 DPI and preferably in Black and White, for eOffice purpose to avoid big file size.

- vi. Sometimes voluminous documents may be received in hard copy as enclosures to a letter. The diarization employee has to scan only the letter and mention in the Enclosure field about the enclosures while diarizing meta data. This enclosure is to be sent to the dealing section in hard copy as per prevalent practice.
- vii. Sometimes, the scanned images may exceed more than 20 MB size and it may not be uploaded. In that case, it should be compressed to minimize the size within 20 MB so that it can be uploaded.
- viii. Fill up all the meta data fields, whichever available. This is important in order to trace a receipt in future. While filling meta data field Name of the sender is to be filled like **Raj Kumar Bansal**. If abbreviated name is given in the letter like RK Bansal, the same should be filled like RK Bansal and not R.K. Bansal or R K Bansal or Shri RK Bansal.
- ix. Write the eOffice receipt number and date on the hardcopy of the correspondence received and put the same in physical file for future reference.

- x. The correspondences which are getting diarized in eOffice do not require diarization in physical receipt register. eOffice provides facility of Report generation in respect of Receipt, File and Dispatch in various formats, therefore, physical docketing at every section should be stopped.
- xi. Receipts, if received in Duplicate or those Receipts, for which no action is required should be closed by the recipient.
- xii. Retention period for physical folders shall be specified in due course.
- xiii. Storage of physical dak after scanning shall be done as follows: -
 - a) Central Repository Unit (CRU) will retain physical dak in a folder.
 - b) Dak will be kept chronologically. At periodic intervals, the folder will be stitched and kept safely by CRU in its custody.
 - c) Any dak required in physical form by a section will be collected by them from CRU. In such a case, CRU shall keep a copy of the first page of the dak and take receipt on it from the recipient.

B. File Management

- i. Once the file classification work of a particular section gets completed and mapped, the user of the said section can create a new file for the mapped subjects.
- ii. The purpose of eOffice is to build institution history and for that, it is imperative that files are created in a judicious manner. Opening up file for every matter has to

be strictly avoided. It should be ensured that cases are put up only in created relevant files. Creation of new files should be done only when required and Section Heads should monitor this. Also, Part file in the system should be used only when it is a necessity i.e. main file is in movement and there is an urgent need to put up the file.

- iii. Receipts are to be attached on the correspondence side. Documents referred in the note should be uploaded under 'References'. If any eFile is required to be referred, the same may be linked through 'Link' button. Any eFile which seeks consideration along with present file may be attached through 'Attachment' of file. For attaching a scanned copy of physical file, the same should be attached in NoteSheet of eFile. In case of any of above, it is the responsibility of the user to specifically mention in the Green Note regarding references uploaded, File/Receipt attached, File linked etc.
- iv. When work on a file has been done (e.g. a note got approved and some approved draft has been issued), the file typically is in the inbox of the officer who has initiated the file. At this point, the file should be parked otherwise, it will be shown as pending in the inbox. Whenever some new work comes on that file, the file should be unparked and work done on the same. The file should be closed when the work is permanently complete for the file.
- v. File closing will be given to the AGMs and above.
- vi. Draft approver role: -
 - a. For BSNL CO and Circle Offices, Draft Approver Role in eFile will be given to the DGMs and above.

b. For SSAs/Field Units, Draft Approver Role will be given to the AGMs and above.

C.Issue/Dispatch

- i. In eOffice, a user can issue communication in two ways i.e. in reply to a receipt received and from subject related file.
- ii. At present, there is no provision of circulation of communication issued amongst the eOffice users. NIC has been requested to make provision for this. Till any provision is made, the issue/dispatch, which is required to be circulated amongst eOffice users should be converted to receipt by the issuer and should be sent through eOffice receipt to eOffice users. Conversion of Issue/Dispatch at Issuer's end would avoid multi diarization at the recipient's end as well as would ascertain delivery of information.

D.Use of Digital Signatures (DSCs/eSign)

- i. Any file created/forwarded or any action taken by a particular user on a file in eOffice application will be deemed to have been signed by the employee himself/herself.
- ii. All employees should set use of OTP feature while logging in to eOffice for enhanced security.

Once DSC/eSign facility is made available by eOffice "Project Management Unit", following policy will come into practice: -

- iii. DSCs to be provided for DGM and above level officers.
- iv. BSNL eSign facility to be provided for all AGMs and AOs/CAOs.

E. Role of different users in eOffice

i. Role of eOffice users

eOffice user should check whether his or her name, post and the section is reflecting properly while working in File Management System. If user finds any correction is required, the same should be informed to eOffice Team of concerned office.

ii. Role of Nodal Officer at Section Level

A Nodal Officer has to be nominated at each Section. He or she should be well conversant with all the features of File Management System of eOffice so that he can train and guide other users of his Section. In case of promotion, transfer, superannuation or any form of exit, joining, release, interchange of work within section, delegation of power etc, the Nodal Officer will be responsible to get the data updated and get the files transferred in eOffice through eOffice Team.

iii. Role of eOffice Team at each Circle Office or SSA or Unit

There shall be eOffice Team at each Circle Office as well as SSA or Unit. The responsibilities of the eOffice Team will be: -

- a) To establish a helpdesk for the users.
- b) Employee Master Detail (EMD) Management.
- c) File transferring and role change as requisitioned by the Nodal Officer of the Section.
- d) To forward the request of Nodal Officer to Super Admin (through Circle Office for SSA eOffice Team) for adding a new subject category or file classification, Change in the name of Local Admin etc.
- e) To arrange training of different levels.
- f) Coordination with Nodal Officers.

iv. Role of Super Admin at Global Level

NIC recommends that there should be only one Super Admin in an instance of eOffice. Super Admin role will be at Corporate Office with eOffice “Project Management Unit” (PMU) and the responsibility of Super Admin shall be

- a) Overall technical administration of eOffice.
- b) Creation of Global Organisation Units.
- c) Creation of Local Admins and giving suitable roles.
- d) Coordination with NIC and Cloud partner for Server issues.

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No. BSNLCO-COMN/18(13)/4/2021-MMT

Dated: 16.06.2021

Through BSNL Intranet Portal

To,

The Chief General Managers
All Telecom Circles/ Field Units, BSNL

The PGMs/Sr.GMs/GMs
BSNL Corporate Office, New Delhi

Subject: Standard Operating Procedure (SOP) for Invoice management in the e-Office and ERP systems.

Pursuant upon implementation of eOffice in BSNL, several references have been received from Circles regarding the use of the ERP and eOffice system for certain processes related to invoice management.

In order to avoid duplication of work in the ERP & e-Office system, a comprehensive Standard Operating Procedure (SOP) has been envisaged which is to be scrupulously followed by all the units of BSNL. The details of SOP are as below:

S.No	Action /Instruction
1	There is neither any conflict nor overlap with processes/workflows already defined on ERP. After implementation of ERP, all processes for which workflows have been created in ERP, are to be executed on ERP only, hence these processes in physical files became redundant and stand discontinued.
2	As the process of tender is not being done through ERP, the processing of tenders will continue to be followed on e-Office. Purchase requisition, which provide the justification for a purchase proposal, must be generated and approved on ERP before a tender proposal is processed on e-office. All tenders for CAPEX or OPEX must be done against approved purchase requisition only. However if budget allotment is not possible during approval of PR, a notional budget may be allotted for purchase request and tendering process initiated on e-office. Award of work / APO shall be approved only after the actual budget is allotted.
3	Tender process up to finalization of the Agency shall continue to be done on e-Office.
4	All processes from issue of Advance Purchase Order (APO) onwards shall be done in ERP work flow only. Any PO issued without ERP PO number will be considered unauthorized. The executives vested with authority of approval of Purchase/Work Orders must approve these documents in ERP workflow ONLY. The PO should be complete with all terms & conditions as is required as per Company's procurement policy.

5	The process for receipt of stores & services is already configured in MM module of ERP. These processes are configured to be used in real time, instead of being secondary system to be updated after the event. The invoices received in concerned branches should be processed on ERP capturing all details. The approval by each functionary in the workflow is done through an authenticated login to ERP system, hence the same is digital/ electronic approval, and shall be treated as such. The process of endorsements made on the invoices under authentication by the unit level functionaries receiving the physical invoices shall continue.
6	After processing the invoices through SES/MIGO, the physical invoices should be transferred to Accounts Office. For reference purpose, SES/MIGO DOCUMENT NUMBER shall be written on the physical invoice.
7	Upon receipt of physical invoices in the accounts office, the MIRO work flow approval shall be initiated by Accounts Office. The workflow on ERP should not be followed up with movement of physical file or a process on e-Office. Any functionary wishing to refer physical document may however record the same in workflow and seek such documents, which will then be provided by concerned /relevant officers in physical file with reference of the same being recorded on ERP.
8	Authorities competent for authorizing release of payment have been given the role of "payment block removal" which is available in workflow only. The definitions and components of workflow are controlled centrally.
9	A user ID and role for audit functionaries is already available in ERP which is activated upon request of a circle, as per schedule of audit, to be used by both, P&T audit as well as statutory auditor(s).
10	Non PO based payments like Rent, Electricity Bill etc. are already part of ERP workflow and no physical/ eOffice file to be used in this case
11	For payments related to staff claims, most of the processes are implemented in ESS of ERP. Hence all ESS related items should not be part of physical/ e-Office file.
12	Any process which is not there in ERP [e.g.- staff (whether serving or retired) related claims exceeding limits] shall be done through eOffice.
13	All physical files shall be replaced with eOffice and ERP related process shall continue in ERP only. The practice of processing physical/ e-Office case, to be followed up with the process on ERP must be stopped IMMEDIATELY. Based on cases, if required, reference of e-file /ERP numbers can be mentioned in ERP / eOffice for linking (for any information required at a later date).

This is issued with the approval of competent authority.

(Bhagwati Prasad)
AGM (MMT)
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Copy to:

- 1) PPS to CMD, BSNL
- 2) DIR CFA/ EB/ CM /HR/Fin, BSNL Board.