## Amendment History

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Introduction

Employee Master Details (EMD) application aims at data storage of an organization at the central level. The interface allows the Super admin/Local admin to manage activities of creating/adding new employees, designation, post, and other detail through EMD. The purpose of EMD is to store the data at the central level, so that the other application of eOffice can access the data from the single source. The information below direct the procedure to Add, View and Edit details in EMD.
Employee Master Details (EMD) application aims at storing data at the global level in any organization. The data is stored at the central level that can be accessed by all the applications of eOffice. The interface allows the super admin to create master details and appoints local admin, who is responsible for the management of the respective department employee's data.

EMD is a web-based system that automates and manages employee data at a global level. EMD has two users:

1. Super Admin
2. Local Admin
Local Admin: For every global organization a respective local admin is created. A local admin is a user created by super admin, where some of the privileges are given to local admin to manage data; like managing the posting and promotion of employees’, creation of organization unit etc. at the local level for the respective global organization. Also, global organization is the top organization unit to which all the other OU's of a respective department is mapped.

E.g. Ministry of Finance is a super admin (Global Organization), Dept. of Finance and Services and Dept. of Revenue are the global organizations to which all the other OU’s of that dept. (Admin, O/o secretary etc.) are mapped and report to it.

Local Admin comprises of two sections

Creation & Mapping

- Organization
- Employee
- Transfer

Report Module

Reports
Creation & Mapping

Organization

It allows the local admin to create or map new/existing organization related details to the database at confined level. Following are the activities which are managed under Organization.

Entity

The entity is a broader way of classifying organization unit. For example, an organization (Department of Revenue) has various sections like Cash, Admin etc. and the entity for all of them is “Section “likewise, Joint Secretary Office, Director Office etc. will come under the entity “Office.

Entities that are created by superadmin are the global entities which are used by the local admin for mapping to it respective organization. However, a localadmin can also create in the case when entities are not available in General list and can map to the Available to your organizationlist for its respective department.

Steps to perform actions are as under:

- Click on the Entity module as shown in Fig.1:

![Fig.1](image)

- To map the existing entities to the organization, select the desired entity from the available entities in General section (Fig.1).

- Select the desired entity from the available entities in General section which need to be moved to the Available to your Organization List (Fig.1).

- Click on the forward arrow button to move the selected entity/entities to Available to your Organization section. (Fig.1)
As a result, selected entity moved from **General** to **Available to your Organization** and the message will appear as "Record inserted successfully in your Organization" (Fig 2).

To add a new entity, click on the **New Entity** button in order to add entity in the list as shown in Fig.3:

Enter the details in required fields and click on the **save** button as shown in Fig.4:
Note:
1) Once the entity is mapped and assigned with an OU it cannot be unmapped.
2) Refer to Hierarchy of Entity module for details.

**Entity Hierarchy**

It is an arrangement/assignment of entities (Dept, Office, and Section) where each child-entity and its element are mapped to one or more elements of parent's entity. Entity hierarchy is used to define the OU type on the basis of which hierarchy of the OU is maintained. This depicts the levels in an organization unit, where entities are represented from the top level to the entities which are below to it.

Local Admin can map or associate an entity to its parent entity e.g. “Section” is a child entity where the elements of it are various sections (cash, admin, establishment) and its parent entity is “Office” whose elements are (Secretary, joint secretary) etc.

To create an Entity Hierarchy, the user has to perform the following steps:

- Click on the **Entity Hierarchy** modules shown in [Fig.5](#):
  - Enter the details in mandatory (Entity Type and Parent Entity Type) fields ([Fig.5](#)).
  - Click on the Checkbox (✓) corresponding to the field in order to **active** the state of entity hierarchy ([Fig.5](#)).
  - Click on the **Save** button. As a result, the record will be saved, as shown in **Entity Hierarchy List(s)**.

Note:
Admin can **Edit** the record by clicking on the icon as shown in [Fig.5](#).
Designation

Designation refers to nomination or appointment to hold an office or post. E.g. Director, Section Officer Etc. Designations created by super admin are the global designations which are used by the local admin for mapping to its respective organization.

Steps to perform the actions are as under:

- Click on the **Designation** link as shown in Fig 6:

![Fig 6](image)

- To map the existing designation to the organization, select the desired available designation from the General list as shown in Fig 7:

![Fig 7](image)

- Click on the **forward arrow** button to move the selected designation to **Available to your Organization** (Fig.7).
As a result, the selected designation is moved from **General** to **Available to your Organization** as shown in Fig.8:

![Fig.8](image)

**Holiday Calendar**

Holiday Calendar specifies holidays (RH/GH) scheduled for a particular organization. It creates calendar name at a confined level for its respective department. Holiday Calendar is used to map calendar from **General** section to a specific organization section. It maps all the **Calendar Data** (New Year, holidays, holiday type etc.) into one place created by super admin.

Steps to perform the actions are as under:

- Click on the **Holiday Calendar** link as shown in Fig 9:

![Fig.9](image)
To map the existing calendar to the organization, select the desired calendar name from the General list as shown in Fig 10:

Fig.10

- Click on the forward arrow ( ) button to move the selected calendar to Available to your Organization (Fig.10).
- As a result, the selected calendar will move from General to Available to your Organization as shown in Fig.11:

Fig.11

- Admin can also add New Calendar. To add, click on the New Calendar ( ) button as shown in Fig.12:
Enter the details in mandatory fields as shown in Fig.13:

- Click on the Checkbox (✓) corresponding to the field in order to Active the state of the calendar (Fig.13).

- Click on the Save (✓) button. As a result, the record will be shown in the list (Fig.13).

**Organization Unit**

Organizational Unit depicts Sections/Office/Cell name under one organization, where all the employees under one OU report directly to their reporting OU's officer. E.g. secretary and its personal staff are under one OU i.e. O/o Secretary. Likewise, all the employees of a cash section are under one OU i.e. Cash Section.

Steps to perform the actions are as under:
• Click on the **Organization Unit ( )** module as shown in **Fig.14:**

[Rough sketch of Fig.14]

• Click on the **Show All ( )** button to view all the existing organization unit as shown in **Fig.15:**

[Rough sketch of Fig.15]

• Enter the required information and click on the **Search ( )** button to search the organization unit (Fig.15).

• As a result, organization unit will appear in the list as shown in **Fig.16:**
Note:

Admin can edit the saved records by clicking on the icon Fig.16.

- To add the organization unit, click on the Organization Unit (Add Organization) button as shown in Fig.17:

- Enter the required information in Organization Unit page and click on the Save (save) button as shown in Fig.18:
Organization Unit Hierarchy
To view the hierarchies of organization unit (OU) perform the actions are as under:

- Click on the Organisation Unit Hierarchy ( ) module as shown in Fig.19:

- Search the parent organization unit from the drop-down in the search field to view the hierarchy as shown in Fig.20:
Click on the **Hierarchy** link to view the hierarchy of the respective organization unit.

Click on the **Post details** link to view Posts, Employee Name and other details of the respective OU as shown in **Fig.21**.
Post

Post refers the current job allocated to the employee in a department. Posts that are created by super admin are the global posts which are used by the local admin for mapping to its respective organization. However, local admin can also create in the case when posts are not available in General list and can map to the Available to your organization list for its respective department.

Steps to perform the actions are as under:

- Click on the post (Post) module as shown in Fig 22:

![Fig.22](image)

- To map the existing posts to the organization, select the desired post name from the General list as shown in Fig 23:

![Fig.23](image)

- Click on the forward arrow (arrow) button to move the selected post to Available to your Organization list (Fig.23).
As a result, the selected calendar will move from **General** to **Available to your Organization** as shown in **Fig.24**: 

![Fig.24](image)

- Admin can also add posts. To add, click on the **New Post** as shown in **Fig.25**: 

![Fig.25](image)

- **Add Post** page appears. Enter the required details and click on the **Save** button as shown in **Fig.26**: 

![Fig.26](image)
As a result, the record is saved and displayed in **Post List(s)**.

**Note:**
A user can edit/modify the record by clicking on the 📝 icon.

**Post Sanction**
This option allows the local admin to restrict the number of posts in an organization unit. E.g. cash section is sanctioned with two assistant posts, then, it is not possible for a local admin to assign third assistant post to the same organization unit.

- Click on the **Post Sanction** module as shown in Fig.27:

![Fig.27](image)

- Enter the required details. (Fig.27).

- Click on the **save** button in order to save the new details (Fig.27).

**Note:**
The **Total No. of Post** field specifies the number of posts assigned to a particular organization.
Employee

This section allows the admin to create or update new/existing employee related details through its modules.

**Employee**

- Click on the Employee module. As a result, Search Employee page appears as shown in **Fig.28**:

![Fig.28](image)

- To search existing data, enter the data and click on the Search button as shown in **Fig.29**:

![Fig.29](image)

- As a result, the record will be displayed (Fig.29).
- Click on the Show all button to view all the existing employees' data altogether as shown in **Fig.30**:
To add new employee detail, click on the **New Employee** button as shown in Fig.31:

As a result, Choose Employee Details Type pop-up appears, select the radio (Basic Information) button and click on **Submit** button as shown in Fig.32:
As a result, Employee Personal Detail Page → Employee Address Detail Page appears, enter the details and click Save (Save) button as shown in Fig.33:

![Fig.33](image)

- **Save/Next button (Save/Next)**: To save the Address details of employee, and move to Contact details and Official Address details screen.
- **Add More/Save (Add More/Save)**: To Save the entered details and to add more details.

**Note:**

Local Admin can **Edit** the record by clicking on the **Edit** icon.

**OR**

- As a result, Choose Employee Details Type pop-up appears, select the radio (Complete Information) button and click on **Submit (Submit)** button as shown in Fig.34:

![Fig.34](image)

- As a result, Details screen appears, enter the details and click **Submit (Submit)** button, as show in **Fig.35**:
As a result, message prompts “Employee Saved/Updated Successfully”.

**Employee Reactivation**
This option allows the local admin to reactivate the deactivated employees account in eOffice through EMD.

To reactivate the accounts, perform the following steps

- Click on the **Employee Reactivation** module as shown in **Fig.36**:  

  ![Employee Reactivation Module](image)

- To activate the employee account, enter the details of the employee and click on the **Search** button as shown in **Fig.37**:  

  ![Search Button](image)
As a result, details of the employee will appear. Click on the **Mark to Active** checkbox, provide necessary **Remarks** and click on the update button as shown in **Fig.38**:

A message prompts “Employee Reactivation Successful”.

**Role Mapping**

This module allows the Local Admin to map the employee created by Super Admin or other Local admin of the same organization (in case of multiple local admin for one global organization). To enable this feature the global organization should be applicable as true by super admin, otherwise the list will remain blank.

To map the employees to organization, from the following steps:

- Click on the **Role Mapping** module as shown in **Fig.39**:
- Role Mapping screen appears, select the Role from drop down, select the employee name from the Employee list.

- Click on the forward arrow (↑) button to move the selected employee to Employee Role Mapping list Fig.40:

- As a result, the selected employee will move from Employee to Employee Role Mapping as shown in Fig.41:
Increment Salary

This module allows the local admin to increase the salary on record through EMD.

To increase the salary of the employees, perform the following steps:

- Click on the Increment Salary module as shown in Fig.42:

  ![Fig.42](image)

- To increase the salary of an employee/employees, enter the details of the employee and click on the Search button as shown in Fig.43:
Enter the mandatory fields and click on the Update (Update) button as shown in Fig.44:

Note:
Check the Exception box for the employee(s) whose salary increment is not required.

Post Assignment
This module maps the created posts and organization unit (OU) with employees. It allows the local admin to assign the posts to employees which are created in EMD.

To assign the posts to employees, perform the following steps:

• Click on the Post Assignment module as shown in Fig.45:
Enter the mandatory field and other required fields to be searched and click on the **Search** button as shown in **Fig.46**:

As a result, if the record exists, it will be displayed in **Post(s) List** as shown in **Fig.47**:
Add/Edit details in the given fields for mapping and click on the Save button (Fig.47).

Note: button is used to sanction multiple posts to a user, having additional charge in the department.

**Post Delegation**

The process of delegation comes into the scenario; whenever the work is assigned to the subordinates in the case of leave or at certain situation. Admin can delegate the post and responsibilities of an employee to another employee for the specific time period.

The steps to delegate the post are as under:

- Click on the Post Delegation module as shown in Fig.48:

  ![Fig.48](image)

- Fill the required and mandatory details for post-delegation and click on the Submit button as shown in Fig.49:

  ![Fig.49](image)
As a result, the record will be available in the Post Delegation List(S) (Fig.49).

**Note:**
Admin can edit the record by clicking on the icon (Fig.49).

**User Profile**
It consists collective details of an employee in a brief format. It enables a user to view their basic details on a single page. The details are segregated into sections:

- Basic Details
- Contact Details
- Permanent Address Details
- Present Address Details
- Designation Details
- Work Status Pay Details
- Primary Office Location Details
- Secondary Office Location Details
- Reporting Officer Details
- Post Details
- Link Officer Details

To view the details, perform the actions are as under:

- Click on the **User Profile** module as shown in Fig.50:
As a result, the page will appear with all the sections (Fig.50).

Click on the Maximizing(+) button to view and edit some of the details.

Click on the Save (Save) button.

Note: In every section, some of the fields are only allowed to edit and update. For complete editing, PIMS application will be used.
Transfer

Transfer module specifies the employees' transfer from one department to another department or from one ministry to another ministry.

Note:
Refer the Annexure-1 (Section 1.5 INITIATE TRANSFER IN EMD) from Transfer/Promotion/Retirement Management in eOffice, SOP.
Reports

**Designation Report**  
This module generates the report on the basis of selected designation.

Steps to view the report are as under:

- Click on the **Designation Report** module as shown in **Fig.51**:

![Fig.51](image1)

- Enter the required details to be searched and click on the **Search** button (**Fig.51**).

- As a result, reports parameters will appear as shown in **Fig.52**:

![Fig.52](image2)

- Select the checkbox of the desired parameters to generate a report and click on the **View** button (**Fig.52**).

- As a result, the record will be displayed in **Designation Wise Report Data** as shown in **Fig.53**:
Note:
1) **Change Parameters** button is provided to change the parameter (Fig.53).
2) **icon** is provided to generate the pdf report (Fig.53).
3) **Excel icon** is provided to generate the excel format report (Fig.53).
4) The user can add an individual **TitleName** and **Name** for the PDF report (Fig.53).

**Post Report**
This module generates the report on the basis of the selected post.

Steps to view the report are as under:

- Click on the **Post Report** module as shown in Fig.54:

- Enter the required details to be searched and click on the **Search** button (Fig.54).

- As a result, reports parameters will appear as shown in Fig.55:
• Select the checkbox of the desired parameters to generate the report and click on the View button (Fig.55).

• As a result, the record will be displayed in Post Wise Report Data as shown in Fig.56:

Note:
1) Change Parameters button is provided to change the parameter (Fig.56).
2) icon is provided to generate the pdf report (Fig.56).
3) icon is provided to generate the excel format report (Fig.56).
4) The user can add an individual TitleName and Name for the PDF report (Fig.56).

Location Wise Report
This module generates the report on the basis of selected location and post.

Steps to view the report are as under:
Click on the **Location Wise Report** module as shown in **Fig.57**:

![Fig.57](image)

Enter the required details to be searched and click on the **Search** button (**Fig.57**).

As a result, reports parameters will appear as shown in **Fig.58**:

![Fig.58](image)

Select the checkbox of the desired parameters to generate the report and click on the **View** button (**Fig.58**).

As a result, the record will be displayed in **Location Wise Report Data** as shown in **Fig.59**:
Note:
1) **Change Parameters** button is provided to change the parameter (Fig. 59).
2) **icon** is provided to generate the pdf report (Fig. 59).
3) The user can add an individual **TitleName** and **Name** for the PDF report (Fig. 59).

**HOD Wise Report**

This module generates the report on the basis of selected HOD name of the department.

Steps to view the report are as under:

- Click on the **HOD Wise Report** module as shown in Fig. 60:

- Enter the required details to be searched and click on the **Search** button (Fig. 60).

- As a result, reports parameters will appear as shown in Fig. 61:
Select the checkbox of the desired parameters to generate the report and click on the View button (Fig. 61).

As a result, the record will be displayed in HOD Wise Report Data as shown in Fig. 62:

Note:
1) Change Parameters button is provided to change the parameter (Fig. 62).
2) icon is provided to generate the pdf report (Fig. 62).
3) icon is provided to generate the excel format report (Fig. 62).
4) The user can add an individual TitleName and Name for the PDF report (Fig. 62).

Master Report Page
This module generates the report which provides the complete detail of employees. The detail includes:

- Section Group
- Employee Code
Steps to view the report are as under:

- Click on the **Master Report Page** module as shown in **Fig.63**:

![Fig.63](image)

- Enter the required details to be searched and click on the **Search** button (**Fig.63**).

- As a result, reports parameters will appear as shown in **Fig.64**:

![Fig.64](image)

- Select the checkbox of the desired parameters to generate a report and click on the **View** button (**Fig.64**).
As a result, the record will be displayed in **Master Report(s) List** as shown in Fig.65:

![Fig.65]

- Click on the **Show All** button to view all the existing employees' report altogether (Fig.65).

**Note:**
1) **Change Parameters** button is provided to change the parameter (Fig.65).
2) ![icon](image) is provided to generate the pdf report (Fig.65).
3) ![icon](image) is provided to generate the excel format report (Fig.65).
4) The user can add an individual **TitleName** and **Name** for the PDF report (Fig.65).

**Basic Employee Report**

This module generates a report, which provides basic detail of employees. The report maintains employees' details (Name, Designation, email Id etc.) depending on selected criteria.

Steps to perform the actions are as under:

- Click on the **Basic Employee Report** module as shown in Fig.66:
Enter the required details to be searched and click on the Search button (Fig. 66).

As a result, reports parameters will appear as shown in Fig. 67:

Select the checkbox of the desired parameters to generate the report and click on the View button (Fig. 67).

As a result, the record will be displayed in Basic Employee Details list as shown in Fig. 68:
Click on the **Show All** (Fig.68) button to view all the existing employees report altogether.

**Note:**
1) **Change Parameters** button is provided to change the parameter (Fig.68).
2) **icon** is provided to generate the pdf report (Fig.68).
3) **Excel** icon is provided to generate the excel format report (Fig.68).
4) The user can add an individual **TitleName** and **Name** for the PDF report (Fig.68).

**Inactive Employee Report**

This module generates the report, which provides the details of inactive (Retired/ superannuated, Transfer, Expired) employees in EMD.

Click on the **Inactive Employee Report** (Fig.69) module as shown in Fig.69:

Enter the required details to be searched and click on the **Search** (Fig.69) button.

As a result, reports parameters will appear as shown in Fig.70:
Select the checkbox of the desired parameters to generate the report and click on the View button (Fig.70).

As a result, the record will be displayed in Inactive Report data list as shown in Fig.71:

Click on the Show All button to view all the existing employees reports altogether (Fig.71).

Note:
1) Change Parameters button is provided to change the parameter (Fig.71).
2) icon is provided to generate the pdf report (Fig.71).
3) icon is provided to generate the excel format report (Fig.71).
4) The user can add an individual TitleName and Name for the PDF report (Fig.71).