## Amendment History

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<td>Standard Operating Procedure</td>
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</tr>
</tbody>
</table>
# Table of Contents

Introduction: .......................................................................................................................... 5

Purpose: ................................................................................................................................. 5

Managing User Transfer/Promotion/Retirement in eOffice ...................................................... 7
Event 1: Transfer within same Department [Global Organization] ............................................ 8
EVENT 2: Transfer of a user from one Global OU to another Global OU. .......................... 11
Event 3: promotion .............................................................................................................. 14
  3.1: Promotion of user with in the same Department.......................................................... 14
  3.2: Promotion and Transfer between Two Department/Organization with in the same instance. .......... 15
Event 4: Retirement of a user .............................................................................................. 18
Event 5: Employee expires (having the user account).......................................................... 19
Event 6: Delegation ............................................................................................................ 20

Manage User Transfer/ Promotion/ Retirement in eOffice .................................................. 23

Roles in PIMS (Personnel Information Management System): ........................................... 23
Roles and Responsibilities: ............................................................................................... 23

Event 1: Transfer within same Department [Global Organization] ........................................ 24
EVENT 2: Transfer of a user from one Global OU to another Global OU. .......................... 27
Event 3: promotion ............................................................................................................ 30
  3.1: Promotion of user with in the same Department.......................................................... 30
  3.2: Promotion and Transfer between Two Department/Organization with in the same instance. .......... 31
Event 4: Retirement of a user .............................................................................................. 34
Event 5: Employee expires (having the user account).......................................................... 35

Annexure -1.......................................................................................................................... 36
  1.1 HOW TO CREATE USER IN EMD ................................................................. 36
  1.2 HOW TO ASSIGN A POST TO EMPLOYEE/USER ........................................ 36
  1.3 TO DE-ASSIGN THE POST ........................................................................ 36
  1.4 ASSIGNING ADDITIONAL POST .................................................................. 36
  1.5 INITIATE TRANSFER IN EMD ................................................................. 36
  1.6 TRANSFERRED JOINING IN EMD ............................................................... 38
  1.7 HOW TO MAKE EMPLOYEE INACTIVE IN EMD ....................................... 39

Annexure -2.......................................................................................................................... 40
Introduction:

Every department/Organization moves through some common activities which occur regularly or irregularly in the department like joining of an employee, transfer, promotion retirement etc. Every department has an administration which keeps record of such activities. Therefore, to facilitate the department with eOffice services the information is required to replicate and manage in eOffice Employee Master Detail (EMD) also, where EMD is a web-based Employee Master Detail system that automates the employee data management at global level.

Purpose:

Is to help and guide the admin of a department to manage the activities of transfer of an employee from one Section/Department to another Section/Department, Promotion, Delegation and Retirement through EMD and have been laid down in the below document with various cases and scenarios.
Manage User Transfer/ Promotion/ Retirement in eOffice (without PIMS)
Managing User Transfer/Promotion/Retirement in eOffice

Followings may be the Events in a Ministry/Secretariat/Department with respect to a user which needs to be updated in the eOffice EMD also, i.e.

Events:

1. Transfer of a user from one OU (section /office) to another OU (section /office) within the Department (Global Organization).  
   [Instance without PIMS] [Instance with PIMS]

2. Transfer of a user from one Global (Department/Organization) to another Global (Department/Organization).
   [Instance without PIMS] [Instance with PIMS]

3. Promotion.  
   [Instance without PIMS] [Instance with PIMS]
   3.1 Promotion of user with in the same Department.  
   3.2 Promotion and Transfer between Two Department/Organization (Global Organization) with in the same instance.

4. User retired.  
   [Instance without PIMS] [Instance with PIMS]

5. Employee expires (having eOffice user account).  
   [Instance without PIMS] [Instance with PIMS]

   [Instance without PIMS] [Instance with PIMS]
Event 1: Transfer within same Department [Global Organization]

**Instance without PIMS**
An Employee gets transferred from one organization unit (section/office) to another organization unit (section/office) within same Global O.U (Organization/Department/Ministry/Secretariat)

**Scenario-1:** Mr. Madhav (SO-Cash) gets transferred from Cash Section to Admin Section as a (SO- Admin) in Department of Revenue (i.e. within the same department) and a new user Mr. S. K. Singh will be joining as (SO-Cash) as mentioned in Figure 1.

![Figure 1](image)

Following are the Steps required to perform in case of Scenario 1.

**Step 1:** Login in EMD with the credentials of Local Admin (Department of Revenue).

**Step 2:** De-assign Mr. Madhav from the Post (So-Cash) *(Refer to 1.3 of Annexure 1)*

**Step 3:** Create a new user Mr. S. K. Singh in EMD *(Refer to 1.1 of Annexure 1)*

**Step 4:** Map Mr. S. K. Singh with the post (SO-Cash), Marking abbreviation and Concerned Organization unit. *(Refer to 1.2 of Annexure 1)*

**Step 5:** Transfer Files / Receipts from Mr. Madhav (Previous Post) to Mr. S.K. Singh (New Post) *(Refer to 2.1 of Annexure 2)*

**Step 6:** Map Mr. Madhav with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. *(Refer to 1.2 of Annexure 1)*
Scenario-2: Mr. Madhav (SO-Cash-2) gets transferred from Cash Section to Admin Section and no one joins as a (SO-Cash-2).

In this scenario, there are **two** possible cases:

**Case-I:** Mr. S.K. Singh (SO-Cash-1) and Mr. Madhav (SO-Cash-2) both are in **Cash section of Department of Revenue** and dealing with different **Subjects**. Mr. Madhav gets transferred from Cash Section to Admin Section, so Mr. S.K. Singh has been assigned with the additional charge of the (SO-Cash-2) which Mr. Madhav was handling before transfer.

Following are the **Step** required to perform in **Case-I** of Scenario-2:

**Step 1:** Login in EMD with the credentials of Local Admin of Department of Revenue.

**Step 2:** De assign Mr. Madhav from the post (SO-Cash-2). *(Refer to 1.3 of Annexure 1.)*

**Step 3:** Map Mr. S.K. Singh as an additional post (SO-Cash-2), Marking abbreviation and Concerned Organization unit. *(Refer to 1.4 of Annexure 1.)*

**Step 4:** Transfer Files / Receipts from Mr. Madhav previous post to Mr. S.K. Singh **additional post**. *(Refer to 2.1 of Annexure 2)*

**Step 5:** Map Mr. Madhav with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. *(Refer to 1.2 of Annexure 1)*

**Case-II:** Mr. Madhav (SO-Cash-2) transferred to Admin Section and neither any other person joined in place of him or nobody taking additional charge for the same.

Following are the **Step** required to perform in **Case-II** of Scenario-2:

**Step 1:** Login in EMD with the credentials of Local Admin of Department of Revenue.

**Step 2:** De assign Mr. Madhav from the post (SO-Cash-2). *(Refer to 1.3 of Annexure 1.)*

**Step 3:** Transfer Files / Receipts from Mr. Madhav’s previous post to concern. *(Refer to 2.1 of Annexure 2)*

**Step 4:** Map Mr. Madhav with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. *(Refer to 1.2 of Annexure 1)*

**Scenario-3:** Mr. S.K Singh having post (SO-Cash) transferred from Cash Section to Admin Section as (SO-Admin) and Mr. Madhav having post (SO-Admin) transferred from Admin Section to Cash Section as a (SO-Cash) within the same department i.e. in Department of Revenue. *(Interchange)*
Following are the Steps required to perform in Case of Scenario-3:

**Step 1:** Login in EMD with the credentials of Department of Revenue.

**Step 2:** De assign Mr. S.K Singh from the post (SO-Cash). (Refer to 1.3 of Annexure 1.)

**Step 3:** De assign Mr. Madhav from the post (SO-Admin). (Refer to 1.3 of Annexure 1.)

**Step 4:** Map Mr. Madhav with the post (SO-Cash), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1).

**Step 5:** Map Mr. S.K. Singh with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1).

**Step 6:** Transfer Files/Receipts from Mr. Madhav old post i.e. (SO-Cash) to Mr. S. K. Singh new post (SO-Cash). (Refer to 2.1 of Annexure 2)

**Step 7:** Similarly, Transfer Files/Receipts from Mr. S. K. Singh old post i.e. SO (Admin) to Mr. Madhav new post SO (Admin). (Refer to 2.1 of Annexure 2)
EVENT 2: Transfer of a user from one Global OU to another Global OU.

Instance without PIMS
A user gets transferred from one Department/Organization to another Department/Organization

Scenario-1: Ms. Nazia (DIR-DEA) transferred from Department of Economic affairs to Department of Revenue as a (DIR-DoR) and a New user Mr. Brijesh has joined in Department of Economic affairs as (DIR-DEA).

Figure 4

Following are the Steps required to perform in case of Scenario 1.

Step 1: Login in EMD with Local Admin credentials of Department of Economic Affairs. 
Step 2: Initiate Transfer for Ms. Nazia. (Refer to 1.5 of Annexure 1).
Step 3: Create a New User Mr. Brijesh. (Refer to 1.1 of Annexure 1)
Step 4: Map Mr. Brijesh with the Post (DIR-DEA), Marking abbreviation and Concerned Organization unit. (Refer to 2.1 of Annexure 2)
Step 5: Login in EMD with Local Admin credentials of Department of Revenue. 
Step 6: Initiate Joining for Ms. Nazia. (Refer to 1.6 of Annexure 1).
Step 7: Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1)
Step 8: Transfer Files/Receipts from Ms. Nazia previous post (DIR-DEA) to Mr. Brijesh new Post. (Refer to 2.1 of Annexure 2)
**Scenario-2:** Ms. Nazia transferred from **Department of Economic affairs** to the **Department of Revenue** and No one has joined in place of Ms. Nazia.

![Diagram](image)

**Figure 5**

In this scenario, there are **two** possible cases

**Case-I:** Presently Ms. Nazia (DIR-1-DEA) and Mr. Brijesh (DIR-2-DEA) both are in Department of economic affairs. Ms. Nazia transferred to Department of Revenue and Mr. Brijesh has been assigned with the additional charge as a (DIR-1-DEA).

Following are the Step required to perform in Case-I of Scenario-2:

**Step 1:** Login in EMD with Local Admin credentials of Department of Economic Affairs.
**Step 2:** Initiate Transfer for Ms. Nazia (DIR-1-DEA). (**Refer to 1.5 of Annexure 1**).
**Step 3:** Map Mr. Brijesh with the additional post (DIR-1-DEA), Marking abbreviation and Concerned Organization unit. (**Refer to 1.4 of Annexure 1**)
**Step 4:** Transfer Files / Receipts from Ms. Nazia’s old post to new additional post of Mr. Brijesh. (**Refer to 2.1 of Annexure 2**)
**Step 5:** Login in EMD with Local Admin credentials of Department of Revenue.
**Step 6:** Initiate Joining of Ms. Nazia from Department of Revenue (**Refer to 1.6 of Annexure 1**)
**Step 7:** Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. (**Refer to 1.2 of Annexure 1**)

**Case-II:** Ms. Nazia (DIR-DEA) transferred from Department of Economic Affairs to the Department of Revenue as a (DIR-REV) and neither any other person joined in place of her or nobody taking additional charge for the same.

Following are the Step required to perform in Case-II of Scenario-2:

**Step 1:** Login in EMD with Local Admin credentials of Department of Economic Affairs.
**Step 2:** Initiate transfer of Ms. Nazia from Department of Economic Affairs. (**Refer to 1.5 of Annexure 1**).
**Step 3:** Transfer Files / Receipts from Ms. Nazia’s previous post to concerned officer’s post (**Refer to 2.1 of Annexure 2**).
**Step 4:** Login in EMD with Local Admin credentials of Department of Revenue.
**Step 5:** Initiate Joining of Ms. Nazia from Department of Revenue. (**Refer to 1.6 of Annexure 1**)
**Step 6:** Map Ms. Nazia with the post (DIR-REV), Marking abbreviation and Concerned Organization unit. (**Refer 1.2 of Annexure 1**)
Scenario-3: Ms. Nazia having post (DIR-DEA) of Department of Economic Affairs transferred to Department of Revenue as (DIR-DoR) and Mr. Brijesh having post (DIR-DoR) of Department of Revenue transferred to Department of Economic Affairs as (DIR-DEA). *(Interchange)*

Following are the Steps required:

**Step 1:** Login in EMD with Local Admin credentials of Department of Economic Affairs.

**Step 2:** Initiate Transfer for Ms. Nazia from Department of Economic Affairs. *(Refer to 1.5 of Annexure 1)*.

**Step 3:** Login in EMD with Local Admin credentials of Department of Revenue.

**Step 4:** Initiate Joining of Ms. Nazia from Department of Revenue. *(Refer to 1.6 of Annexure 1)*

**Step 5:** Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. *(Refer 1.2 of Annexure 1)*

**Step 6:** Initiate Transfer of Mr. Brijesh from Department of Revenue. *(Refer to 1.5 of Annexure 1)*.

**Step 7:** Login in EMD with Local Admin credentials of Department of Economic Affairs.

**Step 8:** Initiate Joining of Mr. Brijesh from EMD of Department of Economic Affairs *(Refer to 1.6 of Annexure 1)*

**Step 9:** Map Mr. Brijesh with the post (DIR-DEA), Marking abbreviation and Concerned Organization unit. *(Refer 1.2 of Annexure 1)*

**Step 10:** Transfer Files/Receipts from Ms. Nazia’s previous post to Mr. Brijesh’s New Post. *(Refer to 2.1 of Annexure 2)*.

**Step 11:** Transfer Files/Receipts from Mr. Brijesh’s previous post to Mr. Ms. Nazia’s new post. *(Refer to 2.1 of Annexure 2).*
Event 3: promotion

Instance without PIMS
This event describes the events in which user gets promoted within the same Department and promotion from one Department to another Department.

3.1: Promotion of user with in the same Department.

**Scenario-1:** A User Ms. Nazia gets promoted to SO(Cash) from Assistant(admin) and is transferred from Administration section to Cash Section in the Department of Economic Affairs and New User Mr. Brijesh has joined as Assistant(Admin) in place of Ms. Nazia

![Diagram showing the promotion process](image)

**Figure 7**

Following are the Steps required to perform in case of Scenario 1

**Step 1:** Login in EMD with Local Admin credentials of Department of Economic Affairs.
**Step 2:** De-assign the post Assistant (Admin) from Ms. Nazia. *(Refer 1.3 of Annexure 1.)*
**Step 3:** Create a New User Mr. Brijesh. *(Refer to 1.1 of Annexure 1)*
**Step 4:** Map Mr. Brijesh with the post Assistant (Admin), Marking abbreviation and Concerned Organization unit. *(Refer 1.2 of Annexure 1)*
**Step 5:** Transfer Files/Receipts from Ms. Nazia’s old post to Mr. Brijesh. *(Refer to 2.1 of Annexure 2).*
**Step 6:** Map Ms. Nazia with the post (SO-Cash), Marking abbreviation and Concerned Organization unit. *(Refer 1.2 of Annexure 1)*
**Scenario-2:** A User Ms. Nazia gets promoted to SO(Cash) from Assistant(admin) and is transferred from Administration Section to Cash Section in the Department of Economic Affairs and no one has joined in place of Ms. Nazia.

In this scenario, there are two possible cases:

**Case-I:** Both Ms. Nazia and Mr. Brijesh are Assistants in Admin Section of Department of Economic Affairs (Same Department). Ms. Nazia gets promoted as (SO-CASH) & all the Files/Receipts need to be transferred to Mr. Brijesh.

Following are the Step required to perform in Case-I of Scenario-2:

**Step 1:** Login with the Local Admin credentials of Department of Economic Affairs.
**Step 2:** De-assign the post of Ms. Nazia. (Refer to 1.3 of Annexure 1.)
**Step 3:** Transfer Files / Receipts from Ms. Nazia’s previous post to Mr. Brijesh’s post (Refer to 2.1 of Annexure 2).
**Step 4:** Map Ms. Nazia with new post (SO-CASH), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1)

**Case-II:** Ms. Nazia gets promoted neither any other person joined in place of her nor anybody taking additional charge for the same

Following are the Step required to perform in Case-II of Scenario-2:

**Step 1:** Login with the Local Admin credentials of Department of Economic Affairs.
**Step 2:** De-assign the post of Ms. Nazia. (Refer to 1.3 of Annexure 1.)
**Step 3:** Transfer Files / Receipts from Ms. Nazia’s previous post to the concerned officer’s post. (Refer to 2.1 of Annexure 2).
**Step 4:** Map Ms. Nazia with new post (SO-CASH), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1)

**3.2: Promotion and Transfer between Two Department/Organization with in the same instance.**

**Scenario-1:** Ms. Nazia is Promoted as a Section Officer (SO-REV1) of Rev 1 Section in Department of Revenue from Assistant (ASST-EA) of EA Section in Department of Economic Affairs and a New user Mr. Brijesh is joining in Department of Economic Affairs as a Assistant (ASST-EA) in place of Ms. Nazia.
Following are the Steps required to perform in case of Scenario 1

**Step 1:** Login with the Local Admin credentials of Department of Economic Affairs.

**Step 2:** Initiate Transfer for Ms. Nazia. (Refer to 1.5 of Annexure 1)

**Step 3:** Create a New User Mr. Brijesh in EMD. (Refer to 1.1 of Annexure 1)

**Step 4:** Map Mr. Brijesh with the Post (ASST-EA), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1)

**Step 5:** Transfer Files/Receipts from Ms. Nazia’s previous post to Mr. Brijesh’s new post (Refer to 2.1 of Annexure 2).

**Step 6:** Login with the Local Admin credentials of Department of Revenue.

**Step 7:** Initiate Joining for Ms. Nazia from EMD of Department of Revenue. (Refer to 1.6 of Annexure 1)

**Step 8:** Map Ms. Nazia with the Post (SO-REV1), Marking abbreviation and Concerned Organization unit EMD of Department of Revenue. (Refer 1.2 of Annexure 1)
**Scenario-2:** Ms. Nazia promoted to **DIR(REV-1)** in Department of Revenue from **US(EA -1)** of Department of Economic affairs and No user has joined in place of Ms. Nazia.

![Diagram of Ministry of Finance](image)

**Figure 10**

In this scenario, there are **two** possible cases:

**Case-I:** Both Ms. Nazia **US (EA -1)** and Mr. Brijesh **US (EA-2)** are Under Secretaries in Department of economic affairs. Mr. Brijesh has been assigned with the additional charge of the post allocated to Ms Nazia

Following are the Step required to perform in Case-I of Scenario-2:

1. **Step 1:** Login with the Local Admin credentials of Department of Economic Affairs.
2. **Step 2:** Initiate Transfer for Ms. Nazia. (Refer to 1.5 of Annexure 1)
3. **Step 3:** Map Mr. Brijesh with the additional Post US (EA-1), Marking abbreviation and Concerned Organization unit. (Refer to 1.4 of Annexure 1)
4. **Step 4:** Transfer Files/Receipts from Ms. Nazia’s previous post to Mr. Brijesh’s new post (Refer to 2.1 of Annexure 2).
5. **Step 5:** Login with the Local Admin credentials of Department of Revenue.
6. **Step 6:** Initiate Joining for Ms. Nazia from EMD of Department of Revenue. (Refer to 1.6 of Annexure 1)
7. **Step 7:** Map Mr. Nazia with the post DIR (REV-1), Marking abbreviation and Concerned Organization unit. (Refer to 1.2 of Annexure 1)

**Case-II:** Ms. Nazia gets Promoted and neither any other person joined in place of her nor anybody taking additional charge for the same

Following are the Step required to perform in Case-II of Scenario-2:

1. **Step 1:** Login with the Local Admin credentials of Department of Economic Affairs.
2. **Step 2:** Initiate Transfer for Ms. Nazia. **(Refer to 1.5 of Annexure 1)**
3. **Step 3:** Transfer Files / Receipts from Ms. Nazia’s previous post to concerned officer’s post **(Refer to 2.1 of Annexure 2).**
4. **Step 4:** Login with the Local Admin credentials of Department of Revenue.
5. **Step 5:** Initiate Joining for Ms. Nazia. **(Refer to 1.6 of Annexure 1)**
6. **Step 6:** Map Mr. Nazia with the post **DIR (REV-1),** Marking abbreviation and Concerned Organization unit. **(Refer to 1.2 of Annexure 1)**
Event 4: Retirement of a user

Instance without PIMS

Scenario: A User Mr. S.K Singh is getting retired and Files/Receipts will be transferred to Concerned. Following are the steps:-

Step 1: Login with local Admin credentials of the Department in which user belongs to
Step 2: De-assign the post of retired user Mr. S.K. Singh. (Refer to 1.3 of Annexure 1.)
Step 3: Transfer Files / Receipts from Mr. S.K. Singh’s to the concerned officer’s Post (Refer to 2.1 of Annexure 2).
Step 4: Inactive the Employee (Mr. S.K. Singh) from EMD. (Refer to 1.7 of Annexure 1).
Event 5: Employee expires (having the user account)

Instance without PIMS

Scenario: User A has expired and his files/receipts are still lying in his account. In this case the eFile administrator can transfer the files/receipts from User A’s account to the concerned officer’s account at a later stage.

Following are the Steps required to perform:

**Step 1:** Login with local Admin credentials of the Department in which user belongs to

**Step 2:** De-activate the post of that user who is passed over. *(Refer to 1.3 of Annexure 1.)*

**Step 3:** Transfer of Files/ Receipts from passed User to Concerned officer *(Refer to 2.1 of Annexure 2)*.

**Step 4:** Inactive the Employee A from EMD. *(Refer to 1.7 of Annexure 1).*
Event 6: Delegation

Instance without/with PIMS

**Scenario-1:** Delegation within the same Department.

Mr. Madhav *(JS-EA)* in the department of economic affairs is going on leave/Tour for duration of one month. Mr. Madhav has delegated his work allocated to Mr. S.K. Singh.

* Mr. Madhav has allotted his work to Mr. S.K. Singh

Following are the Steps required to perform:

**Step 1:** Login to EMD of Department of economic affairs.

**Step 2:** Delegate the Post of Mr. Madhav to Mr. S.K. Singh. *(Refer to 3.1 of Annexure 3)*
**Scenario-2**: Delegation in between two Department or Organization with in the same instance.
Ms. Nazia (AS-EA) of Department of economic affairs is going on leave/Tour for duration of one month and delegating her work allocated to Mr. Brijesh (AS-REV) of Department of Revenue.

*Ms. Nazia has allotted his work to Mr. Brijesh*

Following are the Steps required to perform:

**Step 1**: Login with Super admin (EMD).

**Step 2**: Map Mr. Brijesh with the additional post, Marking abbreviation and O.U (in which Ms. Nazia belongs to). *(Refer to 3.1 of Annexure 3)*

**Note:**
In Parent Organization, you need to select the Department of the user who is delegating.

**Step 3**: Login with local admin (EMD) of Department of Economic affairs.

**Step 4** Delegate Mr. Brijesh additional post of Ms. Nazia. *(Refer to 3.1 of Annexure 3)*
Manage User Transfer/ Promotion/ Retirement in eOffice (with PIMS)
Manage User Transfer/ Promotion/ Retirement in eOffice

PIMS integration with EMD: If a Ministry/ Secretariat/ Department have PIMS, then EMD and PIMS work in synchronization.

Roles in PIMS (Personnel Information Management System):

a) Creator
b) Verifier
c) P and A Officer or PAO
d) User

Roles and Responsibilities:

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<th>Responsibilities</th>
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<tr>
<td>Creator</td>
<td>Create new users in a Department/ Ministry/ Organization.</td>
</tr>
<tr>
<td></td>
<td>Rectify the data in case user raises a flag for incorrect data.</td>
</tr>
<tr>
<td></td>
<td>Manage posting and promotion of users.</td>
</tr>
<tr>
<td></td>
<td>Make employee inactive.</td>
</tr>
<tr>
<td></td>
<td><strong>Note: By default, the local admin rights will be given to the creator for managing employees.</strong></td>
</tr>
<tr>
<td>Verifier</td>
<td>Verify the details entered by the creator are correct and digitally signs using DSC.</td>
</tr>
<tr>
<td></td>
<td>Transfer user from one department to another.</td>
</tr>
<tr>
<td>P and A Officer or PAO</td>
<td>It is applicable and documented in PIMS module.</td>
</tr>
<tr>
<td>User</td>
<td>Confirms whether the data entered by the creator/ verifier in PIMS Service Book is correct or not. For incorrect data, user can raise a flag by clicking on INCORRECT button with remarks.</td>
</tr>
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Event 1: Transfer within same Department [Global Organization]

Instance with PIMS
An Employee gets transferred from one organization unit (section/office) to another organization unit (section/office) within same Global O.U (Organization/Department/Ministry/Secretariat)

Scenario-1: Mr. Madhav (SO-Cash) gets transferred from Cash Section to Admin Section as a (SO- Admin) in Department of Revenue (i.e. within the same department) and a new user Mr. S. K. Singh will be joining as (SO-Cash) as mentioned in Figure 1.

Following are the Steps required to perform in case of Scenario 1.

Step 1: Login with the creator credentials of Local Admin (Department of Revenue).
Step 2: De-assign Mr. Madhav from the Post (So-Cash) (Refer to 4.3 of Annexure 4)
Step 3: Create a new user Mr. S. K. Singh in PIMS (Refer to 4.1 of Annexure 4)
Step 4: Map Mr. S. K. Singh with the post (SO-Cash), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4)
Step 5: Transfer Files / Receipts from Mr. Madhav (Previous Post) to Mr. S.K. Singh (New Post) (Refer to 2.1 of Annexure 2)
Step 6: Map Mr. Madhav with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4)
**Scenario-2:** Mr. Madhav (SO-Cash-2) gets transferred from Cash Section to Admin Section and no one joins as a (SO-Cash-2).

![Figure 2](image-url)

In this scenario, there are **two** possible cases:

**Case-I:** Mr. S.K. Singh (SO-Cash-1) and Mr. Madhav (SO-Cash-2) both are in **Cash section** of **Department of Revenue** and dealing with different **Subjects**. Mr. Madhav gets transferred from Cash Section to Admin Section, so Mr. S.K. Singh has been assigned with the additional charge of the (SO-Cash-2) which Mr. Madhav was handling before transfer.

Following are the Step required to perform in **Case-I** of **Scenario-2**:

1. **Step 1:** Login with creator credentials of Department of Revenue.
2. **Step 2:** De assign Mr. Madhav from the post (SO-Cash-2). *(Refer to 4.3 of Annexure 4.)*
3. **Step 3:** Map Mr. S.K. Singh as an additional post (SO-Cash-2), Marking abbreviation and Concerned Organization unit. *(Refer to 4.4 of Annexure 4.)*
4. **Step 4:** Transfer Files / Receipts from Mr. Madhav previous post to Mr. S.K. Singh **additional post.** *(Refer to 2.1 of Annexure 2)*
5. **Step 5:** Map Mr. Madhav with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. *(Refer to 4.2 of Annexure 4.)*

**Case-II:** Mr. Madhav (SO-Cash-2) transferred to Admin Section and neither any other person joined in place of him or nobody taking additional charge for the same.

Following are the Step required to perform in **Case-II** of **Scenario-2**:

1. **Step 1:** Login with creator credentials of Department of Revenue.
2. **Step 2:** De assign Mr. Madhav from the post (SO-Cash-2). *(Refer to 4.3 of Annexure 4.)*
3. **Step 3:** Transfer Files / Receipts from Mr. Madhav’s previous post to concern. *(Refer to 2.1 of Annexure 2)*
4. **Step 4:** Map Mr. Madhav with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. *(Refer to 4.2 of Annexure 4.)*

**Scenario-3:** Mr. S.K Singh having post (SO-Cash) transferred from Cash Section to Admin Section as (SO-Admin) and Mr Madhav having post (SO-Admin) transferred from Admin Section to Cash Section as a (SO-Cash) within the same department i.e. in Department of Revenue. *(Interchange)*
Following are the Steps required to perform in Case of Scenario-3:

Step 1: Login with creator credentials of Department of Revenue.

Step 2: De assign Mr. S.K Singh from the post (SO-Cash). (Refer to 4.3 of Annexure 4.)

Step 3: De assign Mr. Madhav from the post (SO-Admin). (Refer to 4.3 of Annexure 4.)

Step 4: Map Mr. Madhav with the post (SO-Cash), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4).

Step 5: Map Mr. S.K. Singh with the post (SO-Admin), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4).

Step 6: Transfer Files/Receipts from Mr. Madhav old post i.e. (SO-Cash) to Mr. S. K. Singh new post (SO-Cash). (Refer to 2.1 of Annexure 2)

Step 7: Similarly, Transfer Files/Receipts from Mr. S. K. Singh old post i.e. SO (Admin) to Mr. Madhav new post SO (Admin). (Refer to 2.1 of Annexure 2)
EVENT 2: Transfer of a user from one Global OU to another Global OU.

Instance with PIMS
A user gets transferred from one Department/Organization to another Department/Organization

Scenario-1: Ms. Nazia (DIR-DEA) transferred From Department of Economic affairs to Department of Revenue as a (DIR-DoR) and a New user Mr. Brijesh has joined in Department of Economic affairs as (DIR-DEA).

Following are the Steps required to perform in case of Scenario 1.

Step 1: Login with Verifier credentials of Department of Economic Affairs.
Step 2: Initiate Transfer and Relieve for Ms. Nazia. (Refer to 4.5 & 4.6 of Annexure 4).
Step 3: Login with Verifier's Credentials of Department of Revenue.
Step 4: Initiate Joining for Ms. Nazia. (Refer to 4.7 of Annexure 4).
Step 5: Login with Creator's credentials of Department of Revenue.
Step 6: Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4)
Step 7: Login with Creator credentials of Department of Economic Affairs and create a New User Mr. Brijesh in PIMS. (Refer to 4.1 of Annexure 4)
Step 8: Map Mr. Brijesh with the Post (DIR-DEA), Marking abbreviation and Concerned Organization unit. (Refer to 2.1 of Annexure 2)
Step 9: Transfer Files/Receipts from Ms. Nazia previous post (DIR-DEA) to Mr. Brijesh new Post. (Refer to 2.1 of Annexure 2)
Scenario-2: Ms. Nazia transferred from Department of Economic affairs to the Department of Revenue and No one has joined in place of Ms. Nazia.

In this scenario, there are two possible cases

Case-I: Presently Ms. Nazia (DIR-1-DEA) and Mr. Brijesh (DIR-2-DEA) both are in Department of economic affairs. Ms. Nazia transferred to Department of Revenue and Mr. Brijesh has been assigned with the additional charge as a (DIR-1-DEA).

Following are the Step required to perform in Case-I of Scenario-2:

Step 1: Login with Verifier credentials of Department of Economic Affairs.
Step 2: Initiate Transfer and Relieve for Ms. Nazia. (Refer to 4.5 & 4.6 of Annexure 4).
Step 3: Login with Verifier's Credentials of Department of Revenue.
Step 4: Initiate Joining for Ms. Nazia. (Refer to 4.7 of Annexure 4).
Step 5: Login with Creator's credentials of Department of Revenue.
Step 6: Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4)
Step 7: Login in EMD with Creator credentials of Department of Economic Affairs.
Step 8: Map Mr. Brijesh with the additional post (DIR-1-DEA), Marking abbreviation and Concerned Organization unit. (Refer to 4.4 of Annexure 4)
Step 9: Transfer Files / Receipts from Ms. Nazia's old post to new additional post of Mr. Brijesh. (Refer to 2.1 of Annexure 2)

Case-II: Ms. Nazia (DIR-DEA) transferred from Department of Economic Affairs to the Department of Revenue as a (DIR-REV) and neither any other person joined in place of her or nobody taking additional charge for the same.

Following are the Step required to perform in Case-II of Scenario-2:

Step 1: Login with Verifier credentials of Department of Economic Affairs.
Step 2: Initiate Transfer and Relieve for Ms. Nazia. (Refer to 4.5 & 4.6 of Annexure 4).
Step 3: Transfer Files / Receipts from Ms. Nazia's previous post to concerned officer's post (Refer to 2.1 of Annexure 2).
Step 4: Login with Verifier's Credentials of Department of Revenue.
Step 5: Initiate Joining for Ms. Nazia. (Refer to 4.7 of Annexure 4).
Step 6: Login with Creator's credentials of Department of Revenue.
Step 7: Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. (Refer to 4.2 of Annexure 4)
Scenario-3: Ms. Nazia having post (DIR-DEA) of Department of Economic Affairs transferred to Department of Revenue as (DIR-DoR) and Mr. Brijesh having post (DIR-DoR) of Department of Revenue transferred to Department of Economic Affairs as (DIR-DEA). *(Interchange)*

![Diagram showing the transfer process]

Figure 6

Following are the Steps required

**Step 1:** Login with verifier credentials of Department of Economic Affairs.

**Step 2:** Initiate Transfer and relieve for Ms. Nazia from Department of Economic Affairs. *(Refer to 4.5 & 4.6 of Annexure 4)*

**Step 3:** Login with verifier credentials of Department of Revenue.

**Step 4:** Initiate Joining of Ms. Nazia from Department of Revenue. *(Refer to 4.7 of Annexure 4)*

**Step 5:** Login with creator credentials of Department of Revenue

**Step 6:** Map Ms. Nazia with the post (DIR-DoR), Marking abbreviation and Concerned Organization unit. *(Refer 4.2 of Annexure 4)*

**Step 6:** Login with verifier credentials of Department of Revenue and Initiate Transfer of Mr. Brijesh from Department of Revenue. *(Refer to 4.5 & 4.6 of Annexure 4)*

**Step 7** Login with verifier credentials of Department of Economic Affairs and initiate Joining of Mr. Brijesh from EMD of Department of Economic Affairs *(Refer to 4.7 of Annexure 4)*

**Step 8:** Login with creator credentials of Department of Economic Affairs and map Mr. Brijesh with the post (DIR-DEA), Marking abbreviation and Concerned Organization unit. *(Refer 4.2 of Annexure 4)*

**Step 9:** Transfer Files/Receipts from Ms. Nazia’s previous post to Mr. Brijesh’s New Post. *(Refer to 2.1 of Annexure 2)*

**Step 10:** Transfer Files/Receipts from Mr. Brijesh’s previous post to Mr. Ms. Nazia’s new post. *(Refer to 2.1 of Annexure 2)*
Event 3: promotion

Instance with PIMS
This event describes the events in which user gets promoted within the same Department and promotion from one Department to another Department.

3.1: Promotion of user with in the same Department.

**Scenario-1:** A User Ms. Nazia gets promoted to SO(Cash) from Assistant(admin) and is transferred from Administration section to Cash Section in the Department of Economic Affairs and New User Mr. Brijesh has joined as Assistant(Admin) in place of Ms. Nazia

![Diagram](image)

**Figure 7**

Following are the Steps required to perform in case of Scenario 1

**Step 1:** Login with Creator’s credentials of Department of Economic Affairs.

**Step 2:** De-assign the post of Ms Nazia using check box and provide To Date ➔ Click on Save Button.

**Step 3:** Create a new user Mr Brijesh in PIMS and assign the old post to him in EMD (Refer to 4.1 & 4.2 of Annexure 4)

**Step 4:** Change Designation for Ms Nazia from Assistant to SO, (Refer to 4.9 of Annexure 4)

**Step 5:** For assigning new post to Ms Nazia (Refer to 4.2 of Annexure 4)

**Step 6:** Transfer files/receipts from Ms Nazia’s old post to Mr Brijesh (Refer to 2.1 of Annexure 2)
Scenario-2: A User Ms. Nazia gets promoted to SO(Cash) from Assistant(admin) and is transferred from Administration Section to Cash Section in the Department of Economic Affairs and no one has joined in place of Ms. Nazia.

In this scenario, there are two possible cases:

Case-I: Both Ms. Nazia and Mr. Brijesh are Assistants in Admin Section of Department of Economic Affairs (Same Department). Ms. Nazia gets promoted as (SO-CASH) & all the Files/Receipts need to be transferred to Mr. Brijesh. Following are the Step required to perform in Case-I of Scenario-2:

Step 1: Login with Creator’s credentials of Department of Economic Affairs.

Step 2: De-assign the post of Ms Nazia using check box and provide To Date → Click on Save Button.

Step 3: Change Designation for Ms Nazia from Assistant to SO (Refer to 4.9 of Annexure 4)

Step 4: For assigning new post to Ms Nazia (Refer to 4.2 of Annexure 4)

Step 5: Assign Additional Post to Mr Brijesh (Refer to 4.4 of Annexure 4)

Step 6: Transfer files/receipts from Ms Nazia’s previous post to Brijesh’s post (Refer to 2.1 of Annexure 2)

Case-II: Ms. Nazia gets promoted neither any other person joined in place of her nor anybody taking additional charge for the same

Following are the Step required to perform in Case-II of Scenario-2:

Step 1: Login with Creator’s credentials of Department of Economic Affairs.

Step 2: De-assign the post of Ms Nazia using check box and provide To Date → Click on Save Button.

Step 3: Change Designation for Ms Nazia from Assistant to SO (Refer to 4.9 of Annexure 4)

Step 4: For assigning new post to Ms Nazia (Refer to 4.2 of Annexure 4)

Step 5: Assign Additional Post to Mr Brijesh (Refer to 4.4 of Annexure 4)

Step 6: Transfer files/receipts from Ms Nazia’s previous post to the concerned officer’s post (Refer to (Refer to 2.1 of Annexure 2).

3.2: Promotion and Transfer between Two Department/Organization with in the same instance.

Scenario-1: Ms.Nazia is Promoted as a Section Officer(SO-REV1) of Rev 1 Section in Department of Revenue from Assistant (ASST-EA) of EA Section in Department of Economic Affairs and a New user Mr. Brijesh is joining in Department of Economic affairs as a Assistant(ASST-EA) in place of Ms.Nazia
Figure 9

Following are the Steps required to perform in case of Scenario 1

Step 1: Login with verifier credentials of Department of Economic Affairs. Initiate Transfer and relieve for Ms Nazia

Step 2: Login with Creator’s Account of Department of Economic Affairs and Create User Mr Brijesh (Refer to Event 1)

Step 3: Assign Post to Mr Brijesh (Refer to 4.2 of Annexure 4)

Step 4: Transfer files/receipts from Ms Nazia’s old post to Mr Brijesh (Refer to 2.1 of Annexure 2)

Step 5: Login with Verifier’s account of Department of Revenue and Joining for Employee Ms Nazia

Step 6: Login with Creator’s Account of Department Revenue and assign New Designation to Ms Nazia (Refer to 4.9 of Annexure 4)

Step 7: Assign Post to Ms Nazia (Refer to 4.2 of Annexure 4)
Scenario-2: Ms. Nazia promoted to DIR(REV-1) in Department of Revenue from US(EA-1) of Department of Economic affairs and No user has joined in place of Ms. Nazia.

In this scenario, there are two possible cases:

**Case-I:** Both Ms. Nazia US (EA-1) and Mr. Brijesh US (EA-2) are Under Secretaries in Department of economic affairs.

Mr. Brijesh has been assigned with the additional charge of the post allocated to Ms Nazia.

Following are the Step required to perform in Case-I of Scenario-2:

1. Step 1: Login with Verifier's account of Department of Economic Affairs and initiate Transfer and relieve for Ms Nazia.
2. Step 2: Login with Creator's account of Department of Economic Affairs and Assign Additional Post for Mr Brijesh (Refer to 4.4 of Annexure 4)
3. Step 3: Transfer files/receipts from Ms Nazia's old post to Mr Brijesh (Refer to 2.1 of Annexure 2)
4. Step 4: Login with Creator's account of Department of Revenue and assign New Designation to Ms Nazia (Refer to 4.9 of Annexure 4)
5. Step 5: Assign Post to Ms Nazia (Refer to 4.2 of Annexure 4)

**Case-II:** Ms. Nazia gets Promoted and neither any other person joined in place of her nor anybody taking additional charge for the same.

Following are the Step required to perform in Case-II of Scenario-2:

1. Step 1: Login with Verifier's account of Department of Economic Affairs and initiate Transfer and Relieve Ms Nazia.
2. Step 2: Login with Verifier's account of Department of Revenue and initiate joining for Employee Ms Nazia.
3. Step 3: Login with Creator's account of Department of Revenue and assign New Designation to Ms Nazia (Refer to 4.9 of Annexure 4)
4. Step 4: Assign Post to Ms Nazia (Refer to 4.2 of Annexure 4)
5. Step 5: Transfer files/receipts from Ms Nazia's previous post to the concerned officer's post (Refer to 2.1 of Annexure 2)
Event 4: Retirement of a user

Instance with PIMS

Scenario: A User Mr. S.K Singh is getting retired and Files/Receipts will be transferred to Concerned. Following are the steps:-

**Step 1:** Login with eFile Admin’s account. Transfer files/receipts from Ms Nazia’s account to the concerned officer’s post (Refer to 2.1 of Annexure 2)

**Step 2:** Login with Creator’s account. De-assign the post of Ms Nazia (Refer to 4.3 of Annexure 4)

**Step 3:** Go to Employee → Change Work Status to Retired → Click on Submit

Note:
Employee cannot be deactivated in Employee Tab
Event 5: Employee expires (having the user account)

Instance with PIMS

**Scenario:** User A has expired and his files/receipts are still lying in his account. In this case the eFile administrator can transfer the files/receipts from User A’s account to the concerned officer’s account at a later stage.

Following are the Steps required to perform:

1. **Step 1:** Login with eFile Admin’s account. Transfer files/receipts from Ms Nazia’s account to the concerned officer’s post *(Refer to 2.1 of Annexure 2)*
2. **Step 2:** Login with Creator’s account. De-assign the post of Ms Nazia *(Refer to 4.3 of Annexure 2)*
3. **Step 3:** Go to Employee → Change Work Status to Expired → Click on Submit

**Note:**

Employee cannot be deactivated in Employee Tab
Following are the action which will be performed in EMD:

1.1 HOW TO CREATE USER IN EMD

Step 1: Login in EMD through Local Admin.

Step 2: Go to Employee tab→Employee→New Employee button→select complete Information→Submit button.

Step 3: Enter Employee details and click on Submit button. After clicking Submit button ‘User Created successfully’ prompt will appear (*Fields are mandatory so please fill them)

1.2 HOW TO ASSIGN A POST TO EMPLOYEE/USER

Step 1: Login in EMD through Local Admin of the concerned Department.

Step 2: Go to Posting and Promotions (under Employee Tab in EMD of Local Admin)→Search user with the Employee Code, Employee Name etc.→Search button or press Enter.

Step 3: Click on the Check box to make it active→select the Post of the concerned from the Drop down List of Posts→Provide marking abbreviation of the concerned→select the Organization Unit (O.U) of the concerned from the Drop down List of Organization unit.

Step 4: After completing above mentioned steps click on Save button.

1.3 TO DE-ASSIGN THE POST

Step 1: Login in EMD through Local Admin of the concerned Department.

Step 2: Go to Employee tab→Posting and Promotions→Search user with the Employee Code, Employee Name etc. (whom post needs to be de-assigned)

Step 3: Deactivate the post from Check box and enter To date (till date user is having charge of that post)→Save button.

1.4 ASSIGNING ADDITIONAL POST

Step 1: Login in EMD through Local Admin of the concerned Department.

Step 2: Go to Posting and Promotions under Employee Module→Search user with the Employee Code, Employee Name etc. to whom additional Post needs to be provided→Search button or press Enter.

Step 3: Click (+) button (Appear on the right corner)→another row will appears.

Step 4: Click on the Check box to make it active→select the Post of the concerned from the Drop down List of Posts→Provide marking abbreviation of the concerned→select the Organization Unit (O.U) of the concerned from the Drop down List of Organization unit.

Step 5: After completing above mentioned steps click on Save button.

1.5 INITIATE TRANSFER IN EMD

Step 1: Login in EMD through Local Admin of the Department in which currently User/Employee exist.

Step 2: Click on Initiate Transfer link under Transfer module.
Step 3: Search user with the Employee Code, Employee Name etc.→ Search button or press Enter. (As described in Figure 1)

Step 4: Click on Initiate button under action tab. (As described in Figure 1)

Step 5: After Clicking on Initiate button the Initiate Transfer screen will appear

Figure 2

Enter the Details → Order Date → Order Number → To Location. (As described in Figure 2)

Step 6: Click on Inbox of Transfer, Screen will appear as Figure 3
Save → Finalize and Relieve as showing in Figure 3. A message prompts “Record Saved Successfully” is shown in Figure 4.

1.6 TRANSFERRED JOINING IN EMD

Step 1: After login in to EMD, Click the Transfer Joining Inbox link.
Step 2: List of transferred Users along with the status will be shown.
Step 3: Click on Edit link, the List of Transferred Employee screen appears as shown in Figure 5.
Step 4: Enter the Designation, Actual Joining Date→Save button→Submit button.

1.7 HOW TO MAKE EMPLOYEE INACTIVE IN EMD

Step 1: Login to EMD from Local admin.
Step 2: Go to Employee tab→Employee→Search user with the Employee Code, Employee Name etc.
Step 3: Click Action (edit).
Step 4: Uncheck the active Check box.
Step 5: Provide To date
Step 6: Click on Submit button.
2.1 TRANSFER OF FILES/ THROUGH eFile ADMINISTRATOR

Step 1: Select Department, Section and Transfer from where the file needs to be transferred.
Step 2: Click on Search button present at the bottom.
Step 3: All folders i.e. Inbox, Created, Parked, Closed will be displayed.
Step 4: Select folders from the check box from where you want to transfer the files.
Step 5: Select Department, Section, and Transfer To whom the file is getting transferred.
Step 6: Click on Transfer button.
Step 7: After clicking on transfer button a prompt will be open where you need to upload the concerned Transfer Order Document and give necessary Remarks.
Step 8: Click OK. Files will get transferred.
Annexure - 3

3.1 DELEGATION OF POWER THROUGH EMD

Case 1: Delegation with in the same Department:

Step 1: Login in EMD through Local Admin.

Step 2: Go to Employee tab→Post Delegation select Organisation Name, Post Name, Employee Name etc. And *fields are mandatory→Submit button as shown in Figure 1

![Figure 1](image1.png)

Case 2: Delegation between two Departments.

Step 1: Login in EMD from Super Admin.

Step 2: Go to Employee Data→Post Assignment→Search employee to whom post is going to be delegated.
Step 3: Click on (➕) Sanction another post button, as shown in Figure 2

Step 4: Assign new post in the parent O.U of the department of which Employee is taking additional charge.

Step 5: Login with Local Admin (EMD) of the Department in which additional post is assigned.

Step 6: Go to Employee tab ➔ Post Delegation select Organisation Name, Post Name, Employee Name etc. and * fields are mandatory ➔ Submit button. (Refer Step 1 Annexure 3)
Annexure -4

Following are the action which will be performed in PIMS and EMD:

4.1 HOW TO CREATE USER IN PIMS
   Step 1: Login with Creator’s account.
   Step 2: Go to Personnel Information System -Click on Create New User.
   Step 3: Enter details and submit (* fields are mandatory).
   Step 4: Search the employee using “Search Tab”.
   Step 5: From the Searched Employee List click on “Click to Select” under Action tab to select the particular employee.
   Step 6: Go to Employee Identity I menu and click on “Designation” under “BIO DATA I” and provide Designation to the employee. (Note: Designation given will be shown under the Employee Designation List)
   Step 7: Fill the NIC email ID of the employee using “Communication Address” sub menu.
   Step 8: Go to Employee Identity II menu. Update the salary details of the employee and click on “submit”.

Note:
The updated Salary details will be shown under the Employee Salary Detail List)
After a time interval of 2mins the fields updated in PIMS will be auto synced and reflected in EMD.

4.2 ASSIGN A POST TO EMPLOYEE/USER
   Step 1: Login Login with Creator’s account.
   Step 2: Go to Posting and Promotions (under Employee Tab in EMD of Local Admin)→Search user with the Employee Code, Employee Name etc. →Search button or press Enter.
   Step 3: Click on the Check box to make it active→select the Post of the concerned from the Drop down List of Posts→Provide marking abbreviation of the concerned→select the Organization Unit (O.U) of the concerned from the Drop down List of Organization unit.
   Step 4: After completing above mentioned steps click on Save button.

4.3 TO DE-ASSIGN THE POST
   Step 1: Login Login with Creator’s account.
   Step 2: Go to Employee tab→Posting and Promotions→Search user with the Employee Code, Employee Name etc. (whom post needs to be de-assigned)
   Step 3: Deactivate the post from Check box and enter To date (till date user is having charge of that post)→Save button.

4.4 ASSIGNING ADDITIONAL POST
   Step 1: Login with Creator’s account.
Step 2: Go to Posting and Promotions under Employee Module ➔ Search user with the Employee Code, Employee Name etc. to whom additional Post needs to be provided ➔ Search button or press Enter.
Step 3: Click (+) button (Appear on the right corner) ➔ another row will appears.
Step 4: Click on the Check box to make it active ➔ select the Post of the concerned from the Drop down List of Posts ➔ Provide marking abbreviation of the concerned ➔ select the Organization Unit (O.U) of the concerned from the Drop down List of Organization unit.
Step 5: After completing above mentioned steps click on Save button.

4.5 INITIATE TRANSFER IN PIMS
Step 1: Login with Verifier’s account.
Step 2: Go to PIS ➔ Click on Initiate Transfer
Step 3: Search user with Employee Code/Designation/Name etc.
Step 4: Select user from Searched Employee List ➔ Click on Initiate Transfer Button

4.6 INITIATE RELIEVING IN PIMS
Step 1: Login with Verifier’s account
Step 2: Go to PIS ➔ Click on Relieving Employee
Step 3: Select the employee name ➔ Select Transfer To from the drop down list ➔ Select relieved date
Step 4: Click on Relieve Transfers

4.7 INITIATE JOINING IN PIMS
Step 1: Login with Verifier’s account.
Step 2: Go to PIS ➔ Click on Joining Employee
Step 3: Select user and provide Joining Date
Step 4: Click on Submit Button

4.8 MAKE EMPLOYEE INACTIVE IN PIMS
Step 1: Login with Creator’s account.
Step 2: Go to Employee tab ➔ Employee ➔ Search user with the Employee Code, Employee Name etc.
Step 3: Click Action (edit).
Step 4: Uncheck the active Check box.
Step 5: Provide To date
Step 6: Click on Submit button

4.9 ASSIGN NEW DESIGNATION IN PIMS
Step 1: Login into the Application with NIC email ID login credentials.
Step 2: Search Employee using the Search Screen with any of the field available.
Step 3: Click on “Click To Select” under Action tab with respect to the concerned Employee
Step 4: Click on “Designation” under “BIO DATA I”
Step 5: Click on “Employee Designation List” by Scroll Down at the bottom of the page.
Step 6: Click on “Edit” under Action tab with respect to the ACTIVE Designation of the Employee.
Step 7: Enter “To date” to deactivate the Active Designation of the Employee and click on “SUBMIT” Button. 
Assign New Designation from Employee Designation under Designation by filling all the mandatory fields.
Glossary

Login Credentials: Refers the unique user id and password provided to user.
De-Assign: To take away the assigned duties/roles.
Delegation: Temporarily assignment of role/duties/work from a person to another.
Global organizational unit: Global Organization unit is the administratively separate unit and restricts the data access in terms of organization/employee etc.
Local Admin: Local Admin is a user created by super admin to manage the data of respective global organization unit.
Marking Abbreviation: Is a format of identification used by the organization for marking the files and receipt from one employee to other.
Organizational Unit: Logical separation or actual separation of units within organization can depict section/office/cell etc. have its own hierarchy in organization unit.
Post: Work/responsibilities assigned to a user.
Super Admin: Is to manage all master/reference data/roles, management of Local Admin and Local Departments etc. in the instance.