## Amendment Log

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Description</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>January, 2015</td>
<td>1.0</td>
<td>User Manual</td>
<td>eOffice Project Division</td>
</tr>
<tr>
<td>April, 2016</td>
<td>1.1</td>
<td>User Manual</td>
<td>eOffice Project Division</td>
</tr>
<tr>
<td>Feb, 2019</td>
<td>5.7.1</td>
<td>User Manual</td>
<td>eOffice Project Division</td>
</tr>
</tbody>
</table>
# Table of Contents

**Introduction** .................................................................................................................. 5

**Objective** .......................................................................................................................... 6

**Key Features** ....................................................................................................................... 7

**Process for Applying Tour** ................................................................................................ 9

  - Stage 1: Apply Tour ........................................................................................................... 9
  - Stage 2: Pending Approval ............................................................................................. 10
  - Stage 3: Dash Board ........................................................................................................ 11
  - Stage 4: Book Ticket ....................................................................................................... 14
  - Stage 4: Update Ticket ..................................................................................................... 15
  - Stage 5: Enter Ticket Details .......................................................................................... 15
  - Stage 6: Advance – Approval Pending .......................................................................... 16
  - Stage 7: Settlement and Expense Claims ...................................................................... 17
  - Stage 8: Claim Approval Pending .................................................................................. 19

**Common Functionalities of Tour Log Sheet** ...................................................................... 21

  - Status ................................................................................................................................. 21
  - Tour Approved List .......................................................................................................... 21
  - DSC Registration .............................................................................................................. 23
  - Help .................................................................................................................................. 24
  - Subordinate Report Details ............................................................................................. 24
  - Draft Request .................................................................................................................... 25

**Common Functionalities of Claim Details** ...................................................................... 27

  - Confirmed Expense Claim ............................................................................................. 27
  - Claim History .................................................................................................................... 28

**Common Functionalities of Cash & Account** .................................................................... 29

  - View Advance History .................................................................................................... 29
  - Tour Report ...................................................................................................................... 29
  - Account Section Report .................................................................................................. 30
  - Claims Report .................................................................................................................. 31
  - Advance Report .............................................................................................................. 32

**Common Functionalities of Protocol Section** ................................................................... 33

  - Pending Cancellation Requests ..................................................................................... 33
Update Cancellation Requests ............................................................................................................ 34
Booked ticket history .............................................................................................................................. 34
Annexure -I ........................................................................................................................................... 36
Process for Applying Tour ..................................................................................................................... 36
   Case 1: Process flow for approaching tour date (Pre-Tour) when the advance is applied .................. 36
   Case 2: Process flow for Passed date (Post-Tour) ............................................................................ 48
Annexure-II ............................................................................................................................................ 52
Process for Tour Rejection ................................................................................................................... 52
Annexure-III .......................................................................................................................................... 54
Process for Cancelling Tour Request ................................................................................................... 54
   Case 1: When the employee has not requested for advance ............................................................. 54
   Case 2: When the employee has requested for advance .................................................................. 57
Annexure-IV .......................................................................................................................................... 59
Process for Cash and Settlement ......................................................................................................... 59
   Case 1: Settlement process when the advance is applied ............................................................... 59
   Case 2: Settlement process without the advance ............................................................................. 63
Annexure-V .......................................................................................................................................... 64
Process for Withdraw Tour Request ................................................................................................... 64
Annexure-VI .......................................................................................................................................... 65
Process for Extend Tour Request ....................................................................................................... 65
Introduction

Tour management system is one of the primary modules of eOffice portal which is an internet based service which can be accessed all over by the department/ministries. This application is an automated system to manage tour related information like approval, cancellation etc. of employees in a department/Ministry. Each employee is provided with unique User Id and password for login to the system and applies for the tour. The next higher reporting and approving authority in the hierarchy will look and may accept, reject or keep it in pending state for some reason. The status of the applied tour will keep on updating by the application and reflects on the dashboard of the user. This application is to improve the process of present tour system by saving time and resources in a department.
Objective

eTour is one of the primary modules of the eOffice portal. This module will be used by employees, Admin section, protocol section, cash, and Accounts section to process all the tour related activities through electronic mode. eTour comprises of different sections as follows:

- Tour Log Sheet
- Claims Details
- Cash & Account
- eTour Admin
- Protocol Section

Let’s have a quick overview of the different sections of eTour one by one.
Key Features
Following are features to observe:

- **Request No:** Generates unique no. for every tour request.
- **Status:** Allows the user to view the details of the applied tours, their status and allows performing few actions on the respective tour request.
- **Dashboard:** Provides Personal Details of the user along with status and allows taking approval actions.
- **Draft:** Allows saving the tour request as Draft and work later.
- **History:** Provides to view the history.
- **Security:** Approval is possible only through digital signing.
- **Communication:** User receives SMS and Email alerts on tour approval.
# Roles and Responsibilities

## User Based

### User
- Applies for tour.
- Applies for Claim.
- Generates report.
- Register DSC.
- Closed the tour request.

### Role Protocol Section
- Book ticket
- Update and Confirm Ticket
- Update ticket details and amount.
- Generates report.

### Role Cash and Accounts
- Approves advance request.
- Disburse advance amount.
- Sanction claim request.
- Generates various reports.

### eTour Administrator
- Create workflow for users.
- Configure various drops down options.
- Assign user for protocol section role.
- Generates report.

## Workflow Based

### Reporting Authority
- Views the complete Tour Request of an officer.
- Forwards to controlling Authority
- Digitally signed the tour request

### Controlling Authority
- Views the complete Tour Request of an officer.
- Recommend and Forwards to approving Authority
- Digitally signed the tour request

### Approving Authority
- Views the complete Tour Request of an officer.
- Approves the tour request
- Digitally signed the tour request
Process for Applying Tour

When the tour is applied, the request moves through some channel before getting approved. The applied tour process cycle depends on the tour dates i.e. whether the tour is applied for passed date (Post tour) or applied for approaching date (Pre-tour). When tour date crosses, then application moves tour request details for cash settlement in Claim Details section. The user claims their expense and forwards the details to the next concerning authority which later verifies and approves the request. The process for applying tour has been laid down.

Stage 1: Apply Tour

It facilitates the user to plan for tour in advance as well as in the post dates. It also allows the user to request for advance amount in the case when the user is planning for a tour in advance.

To apply for a Tour, user has to perform the following steps:

- Go to Tour Log Sheet, click on Apply Tour section and enter the Tour Details.
- Select office or sponsored option under tickets arranged by option.
- Select Yes option under Advanced Required and click on Next button as shown in Fig.1:

Fig.1

Note:
1. On the selection of “other” option under “choose flight”, it is mandatory for a user to upload the sanction letter for Travelling in private airlines.
2. User can upload the estimated expenditure proposal approved by the Officer under Estimated Expenditure Proposal option as shown in Fig.1.
3. Additional documents can also be uploaded under Receipts option as shown in Fig.1.
As a result tour details appear, select workflow to move the eTour request forward to the concerned officer as shown in Fig.2:

- click on **Forward** button as shown in Fig.2:

![Fig.2]

A message prompts of successful forwarded tour request as shown in Fig.3:

![Fig.3]

**Note:**
The process to apply tour for past date or post tour date is similar to the above; the only difference for the post tour is Advance Request cannot be raised.

Refer to **(Annexure-I)** for comprehensive study of applying tour.

**Stage 2: Pending Approval**

All tour requests which are waiting to be approved lies under **Pending Approval section**. Requests under this section pertain to the respective Forwarding/Approving authority to take necessary action.

- Go to **Pending Approval** and click on **Request No** as shown in Fig.4:
As a result, Approve/Reject Tour request page appears. Enter comments/reason, select Approve radio button and click on Send (Send) button as shown in Fig.5:

![Approve/Reject Tour Request](image)

**Fig.5**

**Note:**

1) If User has DSC registered then a button appears **Sign and Send** to send the tour request with digital signature.

2) If the Forwarding/Approving authority selects **Reject** option then the request gets closed, and the user has to apply for a new request.

3) Refer to [Annexure-II](#) for the comprehensive study of rejection process.

**Stage 3: Dash Board**

Dashboard helps the user to view tour details, updated status of tour and actions required to be taken in one platform.

1. Go to Dash Board; click any Request No to view the tour details as shown in Fig.6:
2. Click on Cancel link allows user to cancel the tour request (Fig.6).

3. Click on Extend link allows user to extend the tour request (Fig.6).

4. Click on Withdraw Tour link allows user to withdraw the tour request (Fig.6).

Note:
1. Refer to (Annexure-III) for the comprehensive study of cancelling tour request.
2. Refer to (Annexure-V) for the comprehensive study of Withdraw tour request.
3. Refer to (Annexure-VI) for the comprehensive study of Extend tour tour request.

5. Click on Tour Log Sheet link, which allows the user to get the PDF of a tour request.

6. Click on Action ( ) Button under Claim Approval Pending Detail and Advance Approval Pending Details allows to take action on pending requests (Fig.6).

7. Click on Book Ticket option allows user to book ticket and confirms no dues on him from the previous tours to the department as shown in Fig.7:
8. Click on **Forward to Cash option** allows user to forward the advance request to the concerned authority as shown in **Fig.8**:

9. Click on **Advance Return link** allows user to notify for the return advance (Fig.8).
Stage 4: Book Ticket

This section allows the protocol officer to book the ticket.

- Go to Book Ticket under Protocol section module, select on checkbox corresponding to tour request and click on Submit (Submit) button OR click on Action (Action) button as shown in Fig.9:

![Fig.9](image)

Note:
The protocol section sends the letter to agency which can also be taken in hard format by clicking on Agency letter link as shown in Fig.9:

- Select the agency email Id from the drop down and click on Submit (Submit) button as shown in Fig.10:

![Fig.10](image)

Note:
If the user has selected "Self" option under “tickets arranged by” option while applying tour, then the ticket does not comes into the protocol section and directly moves to the Advance Approval Pending section of the respective authority.
Stage 4: Update Ticket
Once the ticket is rendered by the agency, this update ticket section allows the protocol officer to enter the ticket details.

- Go to Update Ticket under Protocol Section module and click on Action ( ) button as shown in Fig.11:

![Fig.11](image1)

- Enter the respective ticket details and click on Submit ( ) button as shown in Fig.12:

![Fig.12](image2)

*Booked ticket:* at the time of updating ticket, booked tickets receipts can be uploaded here as shown in Fig. 12

Stage 5: Enter Ticket Details
It keeps those records whose ticket details needs to be filled by the protocol section.

- Go to Enter ticket details section under Protocol Section Module, search the ticket and click on Action ( ) button as shown in Fig.13:

![Fig.13](image3)
Enter ticket details, click on **Add** button and click on **Save** button as shown in **Fig.14**:

**Note:** Now, user forwards the advance request to the concerned authority by clicking on **Forward Cash for Advance link** (Refer to point No 8 under Stage 3: Dash Board)

### Stage 6: Advance –Approval Pending

All the awaiting advance requests that are to be approved and are subjected to forwarding/approving/cash authority lies under this ‘Advance-Approval Pending’ section.

- Go to **Advance Approval Pending** under Tour Log Sheet module and click on **Action** button as shown in **Fig.15**:

- Enters the Pay details, sanctioning amount and clicks on **Approve** button as shown in **Fig.16**:
Stage 7: Settlement and Expense Claims

All the approved tour request whose tour date is traversed and needs to settle lies under settlement and Expense Claim(s).

- Go to **Settlement and Expense Claim(s)** under Claim Details module, click on **Action** ( ) button as shown in **Fig.17**:

  ![Fig.16](image1)

  ![Fig.17](image2)

- As a result Tour details tab opens, enter the tour details, click on **Add** ( ) button and click on **Next** ( ) Button as shown in **Fig.18**:

  ![Fig.18](image3)
Enter the details in Free board/Lodging, Food Expense, Hotel Details tab.

Select the employee name from the drop down and click on Submit button as shown in Fig.19:

Note:
Refer to (Annexure-IV) for the comprehensive study of cash and settlement process.
Stage 8: Claim Approval Pending

All the claim requests that are waiting to be approved lie under this **Claim Approval Pending** section. Requests under this section pertain to the respective Forwarding/Approving/Cash authority for necessary action.

- Go to **Claims Approval Pending**, click on **Action** button as shown in Fig.20:

![Fig.20](image)

- As a result Approve/Reject Tour request page will appear, enter the sanctioning amount and click on **Next** button as shown in Fig.21:

![Fig.21](image)

- As a result Applied Claim Approval page appears, enter the details and click on **Approve** button as shown in Fig.22:

![Fig.22](image)
Note:

1) If the user is a forwarding officer, then the respective officer will click on Recommend button as shown in Fig.22:

2) If a user is an approving authority and forwarding the tour details only for information then user will clicks on Approve and Forward button.
Common Functionalities of Tour Log Sheet

Status

- Go to Status, click on any Request No to view the tour details as shown in Fig.23:

![Fig.23](image)

- Click on Tour Log Sheet link, which allows the user to get the PDF of a tour request (Fig.23).

- Refer to Dash Board for Cancel, Book Ticket, Close and Forward Cash for Advance link.

Note:
User can take report of all the applied tours by clicking on the link Tour List Report, as shown in Fig 23.

Tour Approved List

All tour requests which are approved by the respective reporting/approving officer lies under Tour approved list.

- Go to Tour Approved List and click on Request No as shown in Fig.24:
As a result, Approve/Reject Tour request page appears. Enter comments/reason, and click on Cancel button as shown in Fig.25:

Note:
1. User can also cancel the tour request from the ‘Cancel Tour’ link available under ‘Action’ tab in Tour Approved List as shown in Fig 24.
2. Cancel Tour link is enable till the tour date is not passed.
DSC Registration

- Go to DSC Registration, select the certificate and click Register, Enter the PIN Number as shown in Fig.26:

![Fig.26]

- Certificate Information is displayed as shown in Fig.27:

![Fig.27]

- As a result, DSC registration gets confirmed and displays message “signed details saved successfully” as shown in Fig.28:

![Fig.28]
On DSC Registered user will get the Sign and Send button at the approval/Reject Tour request page as shown in Fig.29:

Help
It provides travel agency details and Protocol Section details as shown in Fig.30:

Subordinate Report Details
This section allows user to view the tours details planned by his subordinate during a period.

- Enter From Date and To Date by clicking on the calendar icon and click on Search button as shown in Fig.31:
• As a result the list will appear as shown in **Fig.32**:

![Fig.32](image)

**Note:**
User can take the PDF report of his/her subordinate tour detail by clicking on link ‘**Pdf generate**’.

**Draft Request**
The entire saved tour requests which can be edited, forwarded and deleted are listed in Draft Request.

• Go to Draft Request (s) and click on **Action** ([ ] ) button as shown in **Fig.33**:

![Fig.33](image)

• Edit the tour details and click on **Next** ( ) button as shown in **Fig.34**:

![Fig.34](image)
As a result tour details appear, Select workflow & click on Forward (Forward) button as shown in Fig.35:

Note:
User can also delete the tour request clicking on Delete (Delete) button as shown in Fig.33:
Common Functionalities of Claim Details

Confirmed Expense Claim
All the claims which are approved by the account section lies under this section.

- Go to Confirmed Expense Claim under Claim Details module, click on Action ( ) button as shown in Fig.36:

![Fig.36](image)

- click on Generate Receipt ( ) button as shown in Fig.37:

![Fig.37](image)

Note:
User can generate bill receipt and view the bill of approved claim.
Claim History
It captures the records of the applied claims and processed claims.

- Go to confirmed Claim History under Claim Details module and click on Action ( ), as a result the details of the respective tour appear as shown in Fig.38:
Common Functionalities of Cash & Account

View Advance History
It keeps all those tour request records whose advance requests have confirmed.

- Go to confirmed **View Advance History under Claim Details module**, click on **Action ( )** button as a result **Disbursed Advance View** page appears as shown in **Fig.39**:

![Fig.39](image)

- User can take the print of Advance history by clicking on **Print ( )** button as shown in **Fig.39**:

Tour Report
It displays the number of tours held in the specified time period. The report can be filtered on the basis of specific employee name or designation.

- Go to **Tour Report section** under Cash & Account Module, enter the details and click on **Search ( )** button as shown in **Fig.40**:

![Fig.40](image)
• Click on the **Search** button corresponding to the respective tour request as shown in **Fig.40**:

![Fig.40](image)

• As a result, the respective Tour Request Details page appears as shown in **Fig.42**:

![Fig.42](image)

**Account Section Report**

It displays the number of tour request records approved by the Cash & Account Section in a specified duration.

• Go to **Account Section Report** under Cash & Account Module, enter the details and click on **Search** button as shown in **Fig.43**:
As a result, searched details will appear at the bottom as shown in **Fig.44**:

**Note:**
User can generate report by clicking on the link **Generate PDF Report** as shown in **Fig.44**.

**Claims Report**
It displays the number of settled and unsettled claim records in a specified duration.

- Go to **Claim Reports** under Cash & Account Module, enter the details and click on **Submit** button as shown in **Fig.45**: 

As a result, the searched details appear at the bottom (Fig.45).

Advance Report
It displays the number of Pending, Approved and Disbursed advance records in a specified duration.

- Go to Advance Reports under Cash & Account Module, enter the details and click on Submit button as shown in Fig.46:

As a result, the searched details appear at the bottom as shown in Fig.46.
Common Functionalities of Protocol Section

Pending Cancellation Requests

This section allows protocol section to send the intimation to the ticket booking agency for the cancellation of booked ticket.

- Go to **Pending Cancellation Requests** under Protocol Section module and click on **Action** button as shown in **Fig.47**:

![Fig.47](image)

- As a result, the screen appears click on **Submit** button as shown in **Fig.48**:

![Fig.48](image)

- As a result, mail is sent to concerned agency for the cancellation of tickets and a message “Mail Sent Sucessfully” displayed on the screen as shown in **Fig.49**:

![Fig.49](image)
**Update Cancellation Requests**

This section allows protocol section to update the cancelled tour ticket requests which are booked by the ticket booking agency.

- Go to **Update Cancellation Requests** under Protocol Section module and click on **Action** button as shown in Fig.50:

![Fig.50](image)

- As a result, a prompt for the confirmation of ticket to the user appears as shown in Fig.51:

![Fig.51](image)

- Click on **OK** button & the update of cancelled booked ticket gets confirmed (Fig.51).

**Booked ticket history**

It captures all those records of ticket which are booked by the protocol section.

- Go to **Booked Ticket History** under Protocol Section module, enter the "From and To Date" and click on **Search** button as shown in Fig.52:
As a result, the report appears at the bottom of the screen as shown in Fig.53:

**Fig.53**

**Note:**
User can take the PDF report by clicking on Generate Report button (Fig.53).
Annexure -I

Process for Applying Tour

When the tour is applied, the request moves through some channel before getting approved. The applied tour process cycle depends on the tour dates i.e. whether the tour is applied for passed date (Post tour) or applied for approaching date (Pre-tour). The process for applying tour has two condition which further had scenarios which have been laid down.

Case 1: Process flow for approaching tour date (Pre-Tour) when the advance is applied

- Scenario 1: When tickets are arranged by the Office or Sponsors
- Scenario 2: When employee tickets are arranged by self

Case 2: Process flow for Passed date (Post-Tour)

Case 1: Process flow for approaching tour date (Pre-Tour) when the advance is applied

Scenario 1: When tickets are arranged by the Office or Sponsors

Employee enters the tour details ⇒ Sends to the concerned forwarding officer ⇒ Sends to the concerned controlling (if any) or approving officer ⇒ Employee sends the request for book ticket to protocol section ⇒ Protocol section sends the intimation to the ticket agency ⇒ Protocol section updates the ticket details ⇒ Tour details are updated at the ticket desktop by Protocol Section ⇒ Sends to the concerned officer for disbursement of advance if requested by the user ⇒ Moved to Claim Details Section after tour period is over.

![Diagram](image)

Fig.A.1.1
Steps involved for the above scenario are as follows:

**Step 1:** Enter tour details, select office or sponsored option under tickets arranged by, select Yes option under Advanced Required, also enter the advance amount and click on Next button as shown in Fig.A.1.2

![Fig.A.1.2](image)

**Step 2:** The entered details can be saved as draft and can be reviewed again from the Draft request section. User forwards the request to the next concerned authority by clicking on Forward button as shown in Fig.A.1.3

![Fig.A.1.3](image)
Step 3: Forwarding authority clicks on the tour Request No. from Pending Approval section as shown in Fig. A.1.4

Note:
1) User can simultaneously check the current status of their tour request under Status header.
2) User can download the details from tour log sheet link under Status header (Fig.A.1.5).
3) User can cancel their tour request till the tour request has not reached to the cash and settlement section.

Step 4: The forwarding authority forwards the request to approving authority by selecting on Recommend option and click on Send button and as shown in Fig.A.1.6:
Step 5: Approving authority selects the tour request from Pending Approval section, select the status as Approve and click on Send button as shown in Fig.A.1.7:

Step 6: Now the user books the ticket by clicking on Book Ticket option from their dashboard as shown in Fig.A.1.8 and confirms no dues on him/her from the previous tours to the department.
**Step 7:** The tour request is now received at Protocol Section, the protocol user goes to **Book Ticket** section and clicks on **Action** ( ) button as shown in **Fig.9:**

**Step 8:** Select the **Agency Email Id** and click on **Submit** ( ) Button as shown in **Fig.A.1.10:**
Step 9: Once the ticket is rendered by the agency, the protocol section updates the ticket details by clicking on Update Ticket section as shown in Fig.11:

Step 10: The protocol section clicks on Action ( ) Button, enters the ticket details received from agency and clicks on Submit ( ) Button as shown in Fig.A.1.12:

Note: Booked tickets/receipts can also be uploaded while updating the ticket details, as shown in Fig.A.1.12.
Step 11: After updating the ticket, enter the ticket details, amount under **Enter ticket Details** header in protocol section. Click on Action button, as shown in Fig.A.1.13. Then, fill the ticket details & click on Add button, as shown in Fig.A.1.14:

![Fig.A.1.13](image1)

![Fig.A.1.14](image2)

Step 12: Now, the user forwards the advance request to the concerned authority by clicking on **Forward Cash for Advance** link from dashboard as shown in Fig.A.1.15:

![Fig.A.1.15](image3)
Note:
Once the ticket details are entered by the Protocol section at ticket desktop, the ticket moves in the free flow channel and the user can send advance approval to any concerned authority in their department.

**Step 13:** Approving authority clicks on Action (𝐤) button corresponding to the request no under Advance – Approval Pending section as shown in Fig.A.1.16:

![Fig.A.1.16](image)

**Step 14:** The concerned authority enters the Advance sanction amount, Pay Mode and clicks on Approve (𝐤) button as shown in Fig.A.1.17:

![Fig.A.1.17](image)

**Step 15:** Advance amount is disbursed by the Cash & account section. Then the tour request moves to Claim details section once the tour date passes.
Scenario 2: When employee tickets are arranged by self:
Employee enter tour details ⇒ Sends to the concerned forwarding officer ⇒ Sends to the concerned controlling (if any) or approving officer ⇒ Employee forwards the tour request in free flow approval channel to the concerned for Advance disbursement ⇒ Moved to Cash and Settlement after tour period is over.

Steps involved for the above scenarios are as follows:

**Step 1:** Enter tour details, select Self option under tickets arranged by option, select Yes radio button in Advanced Required option, enter the advance amount and click on Next (Next) button as shown in Fig.A.1.19:
**Step 2:** User forwards the entered tour request detail to the next concerned authority by clicking on Forward button (Forward) as shown in Fig.A.1.20:

![Fig.A.1.20](image)

**Step 3:** Forwarding authority clicks on the tour Request No. from Pending Approval section, selects Recommend option, click on Send (Send) button as shown in Fig.A.1.21:
**Step 5:** The request is received at Approving authority, select the tour request from dashboard or from Pending Approval section, select Approve under status option and click on Send button as shown in Fig. A.1.22:

![Fig. A.1.21](image)

**Step 6:** Now, the user forwards the advance request to the concerned authority by clicking on Forward Cash for Advance link from their dashboard as shown in Fig. 23:

![Fig. A.1.23](image)
Step 7: User selects the concerned forwarding authority name for advance approval and clicks on Submit (Submit) button as shown in Fig.A.1.24:

![Fig.A.1.24](image)

Step 8: Approving authority clicks on Action (Action) button corresponding to advance approval request comes under Advance –Approval Pending section as shown in Fig.A.1.25:

![Fig.A.1.25](image)

Step 9: The concerned authority enters the advance Pay mode and sanctioning amount and clicks on Approve (Approve) button as shown in Fig.A.1.26:

![Fig.A.1.26](image)
**Step 10:** Now, the ticket request will move to Claim Details section once the tour date over.

**Case 2: Process flow for Passed date (Post-Tour)**

Tour Details entered by the employee ⇒ Send to Concerned forwarding officer ⇒ Send to Concerned controlling (if any) or approving Officer ⇒ Tour request is send to ticket desktop at Protocol Section ⇒ Employee forwards tour request for approval in free flow channel to Cash and Settlement for disbursement ⇒ After disbursement tour request gets closed by the employee.

![Diagram of process flow for Passed date (Post-Tour)](image)

**Steps involved for the above case are as follows:**

**Step 1:** Enter the tour details and click on **Next** button as shown in Fig.A.1.28:

![Image showing the process of entering tour details](image)
Step 2: The user forwards the entered tour request detail to the next concerned authority by clicking on **Forward** button as shown in **Fig.A.1.29**:

![Fig.A.1.29](image)

Step 3: Forwarding authority clicks on the tour **Request No.** from their dashboard or from **Pending approval** section as shown in **Fig.A.1.30**:

![Fig.A.1.30](image)

Step 4: The forwarding authority selects **Recommend** option under status and forwards the request to approving authority by clicking on **Send** as shown in **Fig.A.1.31**:

![Fig.A.1.31](image)
Step 5: The approving authority selects tour request from their dashboard or from Pending Approval section, select Approve option under status and click on Send button as shown in Fig.A.1.32:

Step 6: Protocol Section searches for the request, enters the ticket details, sanctioning ticket amount under Enter ticket Details option and click on Add button as shown in Fig.A.1.33:
Step 7: Now, the ticket request will be forward to the Cash and Settlement section once the tour date passes.

Note:
Refer to (Annexure-IV) for the comprehensive study of cash and settlement process.
Annexure-II

Process for Tour Rejection

If concerned authority finds any problem in entered details of tour request, then the officer may reject the applied tour request and user starts with a fresh tour request.

Fig.A.2.1

Steps involved for the above process are as follows:

**Step 1:** The concerned officer clicks on the tour request no. from **Pending Approval** section or from the dashboard, as shown in **Fig.A.2.2**:

*Fig.A.2.2*

**Step 2:** The concerned officer selects on **Not Recommended/Reject** option with the appropriate remarks and clicks on the Send  button as shown in **Fig.A.2.3**:  

*Fig.A.2.3*
**Step 3:** The user will receive the status under his dashboard as shown in **Fig.A.2.4:**
Annexure-III

Process for Cancelling Tour Request

If an employee wants to cancel their tour request due to any reason, then the request goes to the next approving officer who may approve or cancel. The cancellation process is taken care on the basis of whether the advance is taken by the employee or not. The process for cancelling the tour request with cases has been laid down.

Case 1: When the employee has not requested for advance

Case 2: When the employee has requested for advance

Case 1: When the employee has not requested for advance

User clicks on the cancel link ⇒ Concerned officer approves the request ⇒ Tour request gets cancelled

![Flowchart](image)

Fig.A.3.1

Steps involved for the above case are as follows:

**Step 1:** The user clicks on the **Cancel** link from **Status** section or from the **dashboard**, as shown in **Fig.A.3.2**.
Step 2: The user enters the reason for the cancellation of tour, selects the concerned workflow and clicks on the Submit button as shown in Fig.A.3.3:

![Fig.A.3.3](image)

Step 3: As a result, a message prompts as shown in Fig.A.3.4:

![Fig.A.3.4](image)
Step 4: The Approving authority clicks on request no. from Pending Approval section as shown in Fig.A.3.5:

![Fig.A.3.5](image)

Step 5: Approving authority enters the reason, selects the respective status and click on the Send (Send) button, as shown in Fig.A.3.6:

![Fig.A.3.6](image)

Step 5: As a result the message prompts as shown in Fig.A.3.7:

![Submit successfully.](image)

Step 8: Once the request is submitted, the Cancel link gets disabled for that particular tour request under tour log sheet, as shown in Fig.A.3.8:

![ NIC, 2019 Ver. 5.7.1 ](image)
Case 2: When the employee has requested for advance

Employee clicks on the cancel link ⇒ Concerned officer approves the request ⇒ Tour request gets cancelled ⇒ Employee clicks on advance return and sends the intimation to the cash section.

**Fig.A.3.8**

**Fig.A.3.9**

**Step 1:** For tour cancellation refer to (Case1: When the employee has not requested for advance) mentioned under process for cancelling tour.

**Step 2:** After cancellation of tour, employee clicks on the **Advance Return** link as shown in **Fig.A.3.10** to send the intimation for returning of the cash.
Step 3: Advance return amount page appears, enter the amount and click on the Submit button, shown in Fig.A.3.11:

Fig.A.3.10

Fig.A.3.11

Step 4: A message prompts, as shown in Fig.A.3.12:

Fig.A.3.12

Note:
1. ‘Cancel’ link will enable once the tour has been approved by the approving authority.
2. ‘Cancel’ link will remain active till the tour request has not been moved in to Claim Details section.
Annexure-IV

Process for Cash and Settlement
When the tour date crosses, the application moves the tour request details for cash and settlement under Claim Details section. The users claim their expenses and forward their details to the next concerning authority which later verifies and approves the request. The process for cash and settlement has further cases which have been laid down.

Case 1: Settlement process when the advance is applied

Case 2: Settlement process without the advance

Case 1: Settlement process when the advance is applied
User enters the tour claim details and verifies ⇒ Approving officer verifies ⇒ Forwards to the Cash Section ⇒ Verification and disbursement of remaining amount by cash section ⇒ User returns the amount to the department if claim amount is less than advance taken ⇒ User closes the request.

![Diagram](Fig.A.4.1)

Steps involved for the above case are as follows:

**Step 1:** Go to Settlement and Expense Claim(s) section under Claim Details module and click on the Action button as shown in **Fig.A.4.2:**
Step 2: User enters all the tour details under **Tour Details** tab, boarding details under **Free Board/Lodging** tab, expense related to food under **Food Expense** tab and **Hotel details** as shown in Fig. A.4.3:

Step 3: User certifies the claimed details under **Self Declaration** tab, selects the concerned officer name and clicks on the **Submit** button as shown in Fig. A.4.4:
Step 4: The concerned officer verifies the claimed request by clicking on Action (③) button under Claims-Approval Pending section as shown in Fig.A.4.5:

Step 5: As a result, a prompt appears showing the advance amount taken by the user as shown in Fig.6:
Step 6: Now, the concerned officer enters the details (if any) and sanction the remaining amount i.e. amount left after deducting the advance amount from the total claim applied and clicks on Next button as shown in Fig.A.4.7:

Fig.A.4.7

Step 7: As a result, Applied Claim-Approval page appears. Officer approves the claim amount & clicks on Approve button as shown in Fig.A.4.8:

Fig.A.4.8
Step 6: Now, the request will move to the user **Confirmed Expense Claim(s)** section.

**Note:**
User returns the amount to the department if the claimed amount is less than the advance taken.

**Case 2: Settlement process without the advance**
User enters the tour claim details and verifies ⇒ Approving officer verifies ⇒ Forwards to the Cash Section ⇒ Verification and disbursement by Cash Section ⇒ User closes the request.

![Diagram of the process](image)

**Fig.A.4.9**

**Note:**
Refer to the steps of case 1 mentioned under **(Case 1: Settlement process when the advance is applied)**.
Annexure-V

Process for Withdraw Tour Request
If an employee wants to withdraw their tour request due to any reason, then before approving of tour request user is able to withdraw the tour request. Once the tour request has been approved by the approving authority then the withdraw link will be disable for the user.

Steps involved for the above case are as follows:

**Step 1:** Go to Dashboard, click on withdraw tour link as shown in Fig.A.5.2:

Note:
After clicking on withdraw tour link, user is redirected to ‘Draft Tour Request’ page from where tour can be reapplied if required.
Annexure-VI

Process for Extend Tour Request

If an employee wants to extend their tour period due to any reason, then 'Extend' link will enable for user at the dashboard.

Preconditions for Extending Tour request:

- If user has requested for the Advance then advance status should be "Advance Disbursed" & applied tour date has been passed.
- If user has not requested for the advance then the status should be "Moved to Claim Details" & applied tour date has been passed.

After extending the tour request, the request will go to the concerned approving authority where officer approves the Extend tour request.

User generates the Extend tour request ⇒ Approving officer verifies ⇒ Tour request moved to claim Details section/advance disbursed after applied tour period is over ⇒ User fill the claim details & forwards to the Cash Section ⇒ Verification and disbursement by cash section.

Steps involved for the above case are as follows:

**Step 1:** Go to dashboard, click on 'Extend' link for extending the tour period, as shown in Fig.A.6.1:

![Fig.A.6.1](image)

**Step 2:** As a result, tour apply page will appear. User can extend the ‘To’ date and click on Next (Next) button as shown in Fig.A.6.2:
Step 3: Select the workflow to forward the tour request to the concerned approving authority and click on Forward (Forward) Button as shown in Fig.A.6.3:

Step 4: Approving Authority will get the 'Extend' tour request under 'Pending Approval' section. Click on extend tour request Id as shown in Fig.A.6.4:
**Step 5:** As a result, 'Approve/Reject Tour Request' page will open. Officer can Approve/Reject extend Tour request by giving the appropriate comments/reason and click on send (Send) button as shown in Fig.A.6.5:

![Fig.A.6.5](image)

After the tour period is over, request will move to Claim Details section with the user.

**Note:** Refer to (Annexure-IV) for comprehensive study of Cash and Settlement Process.