

Ministry of Rural Development Government of India

A Geevika National Rural Livelihoods Mission (NRLM)



# RSETI MIS OPERATING MANUAL

# By Credo Infotech



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#### **Purpose of This Document**

This user manual aims to familiarize you with some of the tasks and processes of the MIS application.

#### **Intended Audience**

This document is intended for users at various RSETI's, who are familiar with the basic tasks and terminology of the application. It will enable you to understand the details of some of the tasks that can be performed using MIS.

# 1. Introduction

RSETI MIS (Management Information System) has been designed and developed to help RSETIs maintain their training and candidate details. This will also help the sponsoring banks to track and monitor the performances of their RSETI's. The MIS is an online application and can be accessed with Username and Password provided to the RSETIs and their controlling offices.

#### **1.1 System Requirement**

- Windows 2000, Windows XP, Windows Vista, or Windows 7
- Latest Browsers (Internet Explorer, Google Chrome, Mozilla Firefox)
- Internet Connection with a minimum bandwidth of 256kbps

This user manual covers some of the tasks that can be performed using RSETI MIS.

# **1.2 Getting Started / Navigate through MIS**

The MIS window includes standard Windows components. Of particular interest:

• The **Header Bar** displays the Logos of the Sponsoring Organizations.



 The Horizontal Toolbar contains the main menus of the tasks that performing the most common tasks.

Dashboard	Settings	Activities	Accounts	Reports

• The **Left Menu** contains the sub menus of the Horizontal menu.



• The **Main Window Area** displays information about the activities and operations you are carrying out.

lome >	Activitie	es > Programs												
														d
SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	idates	Total Cand.	Boarding Details	Batch Summary	
1	1	SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View	ī
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	1

# **1.3 How to Login in to the MIS**

Open Internet Browser (IE, Chrome, Firefox etc.) and Type the URL <u>http://www.rsetimis.org/</u> in the address bar to access the MIS.

The resultant screen will be as below.

सत्यमेव उपते	Ministry of Rural Development Government of India	Acyeevika National Rural Livelihoods Mission (NRLM)	Monitoring Cell for RSETIs National Academy of Rudseti
Login			
	Login Id Password	I Login Forgot Password?	
	SECURE The website is be	st viewed with Mozilla Firefox and Google Chrome.	chrome
	Copyrigh	t © 2010 Credo Infotech. All Rights Reserved.	

Now, use the username and password provided to your Institution to login to the system.

**Note**: the Password is case sensitive.

# **1.4 Introduction of Buttons and Icons**

4	Add New Record
Î	Delete Record
/	Edit Record
60	View Record
19	Home Button
<b>*</b>	Sign out / Logout Button

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# 2. Settings

# 2.1 How to ADD USERS

Dashboard	Settings	Activitie	s A	ccounts	Reports	Monthly I	Report	Communication				Download O	perating Manual v2.0	- <b>***</b>
Settings Change Pa	assword	Hon	ne > Se	ttings > Cre	ate Users									
Users		Institute Info												
Employee						Institute Name	e: RUDSE	ETI Agra		Bank / O	rganisation Name:	RUDSETI		
						Directo	r: R.K. I	Kapoor		Date	e of Establishment	01/01/1997		
					Dire	ctor Mobile N	lo 9412	171234			LandLine No	0562-2965110		
						Stat	te Uttar	r Pradesh	-		District	AGRA	-	
						Email	ld rudse	etagra@yahoo.co.in						
						FACUL								
			USERS	LIST	INFRASIR	UCTURE	FACUL	LIT TRAINING DETAILS	'					<b>4</b>
					User Name		User	r Type Ins	titute Name	Designation	Creat	ted On	Last Updated On	
		1	1	Agra admi	n	1	Institute Adm	nin RUDSETI.	Agra	Faculty	20/04	4/2012	20/04/2012	Ê
		2	1	B.M. Pande	ey	I	Institute User	r RUDSETI.	Agra	Senior Faculty	06/02	2/2013	06/02/2013	<b></b>
		3	1	Gurudev P	achauri	1	Institute User	r RUDSETI.	Agra	Faculty	06/02	2/2013	06/02/2013	<b></b>
		4	1	Viresh Ku	mar Singh	I	Institute User	r RUDSETI.	Agra	Senior Office Assistant	15/02	2/2013	15/02/2013	â

Select **SETTINGS** from the horizontal menu and then click on **Users** from the left menu and then select**Users List**from the horizontal menu. Now, from the above screen click on I to add more users.

Now, from the below resultant screen select the type of user you want to create and also enter all the other relevant details in the fields and click on save.

dd lloor		
Auu user		
User Type *	Select	
Name *	-Select- Institute Administrator	Email
Designation	Institute User	
Login Id *		
Password *		
Confirm Password *		

\* indicates mandatory fields

#### Edit User

You will be able to **Edit** the user by clicking on the  $\checkmark$  as shown below.

		User Name	User Type	Institute Name	Designation	Created On	Last Updated On	
1	1	Demo Admin	Institute Admin	RSETI - Demo		26/10/2012	26/10/2012	â
2	1	Ravi Shankar	Institute Admin	RSETI - Demo	AP	16/11/2012	16/11/2012	Ê
3	1	Ganesh Kanna	Institute Admin	RSETI - Demo	TNWDC	16/11/2012	16/11/2012	會

#### Delete User

You will be able to **Delete** the user by clicking on the  $\widehat{m}$  as shown below.

	User Name User Type		User Type	Institute Name	Designation	Created On	Last Updated On	
1	1	Demo Admin	Institute Admin	RSETI - Demo		26/10/2012	26/10/2012	Î
2	1	Ravi Shankar	Institute Admin	RSETI - Demo	AP	16/11/2012	16/11/2012	Ê
3	1	Ganesh Kanna	Institute Admin	RSETI - Demo	TNWDC	16/11/2012	16/11/2012	Ê

Note: Any details once deleted cannot be reverted back.

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# 2.2 How to UPDATE INFRASTRUCTURE Details:

Settings Change Password	Home > Settings > Create Users						
Users	Institute Info				Edit		
Employee	Institute Name:	RUDSETI Agra		Bank / Organisation Name:	RUDSETI		
	Director:	R.K. Kapoor		Date of Establishment	01/01/1997		
	Director Mobile No	9412171234		LandLine No	0562-2965110		
	State	Uttar Pradesh	Ŧ	District	AGRA	-	
	Email Id	rudsetagra@yahoo.co.	in				
	USERS LIST INFRASTRUCTURE	FACULTY TRAINING DE	ETAILS				Edit
	Whether the in	stitute is functioning from	Owned 👻	If functioning from a rented prem has been allotted by the	ises, whether land State Government	No 👻	100
	Whether the Director has undergone Induction Train at National Academy of RUDSET	ners' Training Programme N, Bangalore, for 11 days	No	Whether the Director is holding independent of	harge of the RSETI	Yes 👻	
		Total Faculties (in-house)	2	Tota	Office Assistants	1	
		Attenders	1		Watchman 1		

Select **SETTINGS** from the horizontal menu and then click on **Users** from the left menu and then select**INFRASTRUCTURE**from the horizontal menu. Now, from the above screen click on <u>Edit</u> to update infrastructure details. The edit screen will be activated only after clicking the <u>Edit</u> link.

Update the relevant details and click on Save.

USERS LIST INFRASTRUCTURE FACULTY TRAINING D	ETAILS				
Infrastructure Info					Cancel Sav
Whether the institute is functioning from own premises/rented one	Owne	d 💌	If functioning from a rented premises, whether land has been allotted by the State Government	No	•
Whether the Director has undergone Induction Trainers' Training Programme at National Academy of RUDSETI, Bangalore, for 11 days	No	•	Whether the Director is holding independent charge of the RSETI	Yes	
Total Faculties (in-house)	2		Total Office Assistants	1	
Attenders	1		Watchman	1	
Clase Doome	Nos.	Capacity	Work shed	Nos.	Capacity
Description	Total	Approx.	Description	Total	Approx.
Class Rooms	2	80	Work shed	1	40
Director's Room	1	2	Staff / Office Room	1	6
Kitchen	1	60	Dining Hall	1	50
Dormitory for Gents	1	35	Dormitory for Ladies	1	35
Guest Room	2	2	Computers	12	48
Laptops	1	1	Internet Connection	2	2
Multimedia Projector	1	1	Training equipment's	3	3
Comments / Remarks / Other Infrastructure (if, any)	Need O	ine more Office As	sistant		

# 2.3 How to Add Director/Faculty Training Details

Dashboard	Settings	Activities	Accounts	Reports Certifica	ates			Download Operating Manual v2.0		
Settings Change Pa	ssword	Home	> Settings > Cre	ate Users						
Users		Insti	ute Info					Edit		
Employee				Institute Nan	ne: RSETI - Demo		Bank / Organisation Name:	DEMO		
				Direct	or: Srini		Date of Establishment	01/01/1900		
				Director Mobile	No		LandLine No			
				Sta	ate Karnataka	<b>.</b>	District	BANGALORE (U)		
				Emai	Ild					
		US	ERS LIST	INFRASTRUCTURE	FACULTY TRAINING D	TAILS				
								Add Faculty Training Details		
		Train	ing Details					Edit Delete		
			N	ame	Qualification	L	Training Atte	nded		
			Basavara	j ( Director )		1.				
						2.				
						3.				

Select **SETTINGS** from the horizontal menu and then click on **Users** from the left menu and then select **FACULTY TRAINING DETAILS** from the horizontal menu. Before adding the training details kindly ensure the below.

Please Add Director/Faculty details at Employee Left Menu, then proceed to add Training details here!

If you have already added the Director / Faculties you will be able to add their training details.

Now, from the above screen click on Edit to update in training details.

You will be able to delete the training details by clicking <u>Delete</u> link.

Now you click on add <u>Faculty training Details</u> as shown below to add Training details of other Faculties in your institute.

			NO DE TAIL S	FACU	INFRASTRUCTURE	SER S LIST
Add Faculty Training De						
<u>Edit</u>						ning Details
	Training Attended		cation		lame	N
		1.			aj ( Director )	Basavara
		2.				
		3.				
Add Faculty Training Detail			VING DETAILS	FAC	INFRASTRUCTURE	SERS LIST
Add Faculty Training Detai Edit Dek			NING DETAILS	FAC	INFRASTRUCTURE	JSERS LIST
Add Faculty Training Detai	Training Attended		VING DETAIL S	FAC	INFRASTRUCTURE	JSERS LIST
Add Faculty Training Deta	Training Attended	1	cation	FAC	INFRA STRUCTURE	ISERS LIST ining Details Basava
Add Faculty Training Detai	Training Attended	1.	cation	FAC	INFRA STRUCTURE	JSERS LIST aining Details Basava
Add Faculty Training Deta	Training Attended	1. 2. 3.	cation	FAC	INFRA STRUCTURE	aining Details Basava
Add Faculty Training Detai	Training Attended	1. 2. 3.	cation	FAC	INFRASTRUCTURE	aining Details Basava
Add Faculty Training Detai Edit Dei	Training Attended	1. 2. 3.	Cation	FAC	INFRASTRUCTURE	aining Details Basavi
Add Faculty Training Detai Edit Dek	Training Attended	1. 2. 3.	cation	FAC	INFRASTRUCTURE	aining Details Basavi
Add Faculty Training Detai Edit Dek	Training Attended		cation	FAC	NRRASTRUCTURE	aining Details Basavi Id Employee T
Add Faculty Training Detail Edit Dele	Training Attended		cation	FAC	INFRASTRUCTURE	USERS LIST raining Details Basavi .dd Employee T Set

Now click <u>Save</u> to update the changes.

# 2.4 How to ADD Employees

Dashboard	Settings	Activiti	es Accounts	Reports							1
Settings Users		ф Н	ome > Settings > Er	nployee							
Emplo	yee		🐛 Search Employ	yee							
Sponso	Irs						Employee Name				
							Search	Show All			
									Click here	to add Employees	4
			Name		Designation	Staff No.	Join Date	Basic Pay	Institute Name	Phone No.	
							No records	a found.			

Select **SETTINGS** from the horizontal menu and then click on **Employees** from the left menu. From the above screen click on as shown above to add more Employees.

Now, in below screen enter all the fields with relevant information about the Employee and click on save.

impioyee into			
Institute Name *	RSETI - Demo	Join Date *	
Name *		Designation *	Select
Staff No. *			
Address			
Address Phone No.		Email	
Address Phone No. Salary Info		Email	

#### \*indicates mandatory fields

#### Edit Employee

You will be able to **Edit** the Employee by clicking on the  $\checkmark$  as shown below.

		Name	Designation	Staff No.	Join Date	Basic Pay	Institute Name	Phone No.		
1	1	Rahul Sharma	Senior Faculty	0120	01/12/2009	25,000.00	RSETI - Demo		View	Î
2	1	Pankaj Yadav	Faculty	0122	01/12/2010	20,000.00	RSETI - Demo		View	Ê

#### Delete Employee

You will be able to **Delete** the Employee by clicking on the  $\square$  as shown below.

		Name	Designation	Staff No.	Join Date	Basic Pay	Institute Name	Phone No.		
1	1	Rahul Sharma	Senior Faculty	0120	01/12/2009	25,000.00 RS	SETI - Demo		View	ŵ
2	1	Pankaj Yadav	Faculty	0122	01/12/2010	20,000.00 RS	SETI - Demo		View	Ê

Note: Any details once deleted cannot be reverted back.

# 3. Activities

# **3.1** How to ADD In house Training Programs

ashboard Settings	Activities	Α	ccounts	s Reports	Monthly Report Communi	cation						f	Download Op	erating Manual	V2.3	R
Activities Training/Inhouse Progr	ams	Hor	ne > Ac	tivities > Progr	ams											
Other Programs												cli	ck here to a	idd more pr	ograms	45
Visitors		SI. No	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	r Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedback	
Tour Programme		1		SE	Rubber Tapping	358	Agricultural EDPs		04 Sep 2013	12 Sep 2013	Add I View	22	Add	View	View	Ê
Training Cost		2		SE	Comprehensive Agriculture & Allied	357	Agricultural EDPs		05 Sep 2013	10 Sep 2013	Add I View	12	Add	View	View	ŵ
Bulk Candidates Upload				0.5												4

Select **Activities** from the horizontal menu and then click on **Inhouse Programs** from the left menu. From the above screen click on  $\overline{\mathbf{4}}$  as shown above to add more **Inhouse Programs**.

Now, in below screen enter all the fields with relevant information about the **Program** and click on save.

nhouse Program			
Organisation Name	RUDSETI	Institute Name	RUDSETI Agra
Program Location *	Select	Batch Number *	366 (Click on the number to edit.)
Program Category	Self Employment	Government Sponsered *	No
Program Type *	Select	EDP Code*	( Type EDP Code. )
Program Name *			
Description			
Sponsor Name	Select	Total Candidates / Trainees *	
Start Date *		End Date *	
No. of Days * (Edit Days for excluding holidays)		Program Co-Ordinator	Select
Field Visit, if any			

Note: The fields here are inter related, when you select an option from the dropdown the next drop down will appear based on your previous selection.

In case you do not find EDP Code, please click the **Click to view EDP Code** link as shown below.

Add Inhouse Program			
Organisation Name	RUDSETI	Institute Name	RUDSETI Agra
Program Location *	Select	Batch Number *	366 (Click on the number to edit.)
Program Category	Self Employment	Government Sponsered *	No 💌
Program Type *	Agricultural EDPs	EDP Code*	Click to view EDP Code ( Type EDP Code. )
Program Name *			

This **view EDP code** link will visible only after choosing **Program type**. Please make sure **Program Type** is selected. Once you click on **Click to view EDP Code** link, you will see a pop up as shown below.

(urai Live	1110003 1411351011	(INICE)	National Academy of Rudseti	
nthly Repo				
			Agricultural EDFS - EDF Codes	
		S.No	Program SubType Name	EDP Code
		1	Advanced Dairy Management	104
		2	Bee Keeping	109
		3	Commercial Floriculture	115
		4	Comprehensive Agriculture & Allied Activities	101
		5	Comprehensive Horticulture	116
		6	Cultivation of Medicinal & Aromatic Plants	114
		7	Dairy Farming	102
		8	Dairying & Vermi composting	103
		9	Mushroom Cultivation	112
		10	Piggery	107
		11	Pisciculture (Inland Fisheries)	110
all and the		12	Plant Nursery Management	111
sation Na		13	Poultry	106
mLocatio		14	Rubber Tapping	113
II LOCATIO		15	Sericulture	105
am Categ		16	Sheep Rearing	108
			Cheep realing	100
gram Type <sup>1</sup>	Agricultural	EDPs	-	

**Description** is not mandatory, however in case you wish to add any relevant information about the program it can be added here.

The **Batch Number** is usually auto generated; however it can be edited before saving the program.

The **Sponsor** name is pulled from list of sponsors you have created through the **Settings** menu.

The **Total Trainees** field will allow you to enter the number of trainees in that particular training. This will freeze the No of trainees to this number and will not allow more trainees to be added when adding trainees.

The **Start Date** and **End Date** are calendar fields; when you click on these fields a calendar will appear from which you need to make a selection. As shown below.

Start Date *								
		Dec	[	• 2	012	-		Silve
	Su	Мо	Tu	We	Th	Fr	Sa	
	2						1	
	2	3	- 4	5	6	7	8	
	9	10	11	12	13	14	15	
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	
	20	21						

\* indicates mandatory fields

### **3.2 How to ADD Candidate/Trainee in to a Training Program**

														<u></u>
														¢
SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	idates	Total Cand.	Boarding Details	Batch Summary	
1	1	SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View	Ē
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	1

Once you have added / created a **New Training Program**, you will be able to **View** or **ADD** more **candidates** to the **Training Program** by clicking on either **View** or **ADD** as shown in the above picture.

Clicking on **ADD** as shown in the above picture it will direct you to the screen as shown below where you can enter information of a candidate and click on **Save** to save the candidate; clicking on **Save & Add More** will save the candidate information and also bring in a new application to add new candidate.

Candidate									
Institute Name * RSETI - Demo		Prog	gram Name	dairy farming		Batch No 2		Roll 1	10 2
sonal Details									
Name of the candidate *						Father / Hust	and Name		
Date Of Birth	DD 💌	-MMM- 💌		•			Age *		
Religion	Select 💌	]					Caste *	Select	•
Education	Select	•				Physically Ha	ndicapped	Select 💌	
Sex *	Select 💌	]				Pov	erty Line *	Select 💌	
	Landline:								
Phone No for communication	Mob1:					Occupation of	the Family		
	Mob2								
Present Occupation of the Candidate	Unemployed						Photo	Choose File No	o file chosen
ntact Details									
Nativity Area	Select	•							
Address									
Vilage						Hobli / Pos	t		
Taluk / Block	· []					State	Sele	ct	-
District <sup>3</sup>	Select	.]				Pin code	e		
ak Details									
Sponsered candidate by ban	No -								
oponoorod canalatic by bain									
ner Details									
Training interested						Relevant Experien	ce No E	xperience 💌	
you are student, in which class you are studying				Name of the	sponser if any Ban	k / NGO / Govt. departm	ent		
mments/Remarks									

#### View Candidate list of a particular training program.

Dashboard	Settings	Activi	ities	Account	s Reports												1	I
Activities		~	Home	Activitie	e > Programe													
Inhou	se Programs			- Activitie	a > Programa													
Other F	rograms																45	
Visitors	5		SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	idates	Total	Boarding Details	Batch Summary		
Tour Pr	ogramme													Canu.				
Search	Candidates		1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View		
	Currenduces		2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	â	

Clicking on **View** will bring the list of all the candidates in that particular training program. As shown in the below picture. You can go back to the Program list page by clicking on the **BACK** button as shown below.

RSETI - De	emo - Dairy Fa	rming (1)								
\$ SI. No.	▲ View	Edit		Photo	\$ Sex	\$ Age	≎ Caste	Contact No.	Settlement Status	Delete
1	େଟ	1	candidate	No Photo Available	Male	23	SC		In Process	Ê
2	ଜେ	1	candidate	No Photo Available	Male	24	SC		In Process	j
3	ଜେ	,	Demo Candidate	No Photo Available	Male	22	GEN	1234569870	Settled	Ê

Further, from the above screen you will be able to **View**, **Edit** or **Delete** candidate information.

#### View Candidate information



Click on *a* as shown in the above picture to view the detailed information about the Candidate / Trainee as shown in the below picture.

Institute Name RSETI - Demo	Program Name Da	ry Farming Batch No. 1	Roll No. 3
ersonal Details			
			No Photo Available
Name of the candidate	candidate	Father / Husband Name	
Date Of Sith	01/01/1989	Age	23
Religion		Caste	sc
Education		Physically Handicspoed	No
Sex	Maie	Poverty Line	APL
Phone No for communication	Landine - Most: Mos2	Occupation of the Parniy	
Present Docupation of the Candidate	Unemployed		
ontact Details			
Nativity Area	Rural		
Address			
Habit		Vilage	
Takik		State	Arunachal Pradesh
Zę		Destrict	LOHT
Sank Detaile			
Sponsered candidate by Bank	No		
Ither Details			
Training interested		Relevant Experience	No Experience
If you are student, in which class you are studying.		Name of the sponser it any Bank / NGO / Govt, department	
commente Remarka			
Francisco			
Comments			
Settlement Details			
5.No	Project Name	Remai	rka
	No	records found	

#### Edit Candidate information

\$ SI. No.	▲ View	Edit		Photo	¢ Sex	¢ Age	\$ Caste	Contact No.	≎ Settlement Status	Delete
1	ŵ.	1	candidate	No Photo Available	Male	23	SC		In Process	â

By clicking the  $\checkmark$  as shown in the above screen the candidate / trainee screen will be displayed in the edit mode.

#### **3.3 How to add candidate photo using webcam:**

From the Candidate Add / Edit page click on Take Photo from Webcam link

ctivities 🐡	Name - Astronom - Candidates					
lanning	Home > Activities > Candidates					
house Programs	Add Candidate					
ther Programs			Dress Desig	ning for		
sitors	Institute Name RUDSETI Veta	apalem Program	Name Women	Batch No	435	Roll No 16
Ir Programme						
arch Candidates	Personal Details					
ining Cost	Name of the candidate *			Father / Husband Nar	me	
Candidates Upload	Date Of Birth	DD	YY	Ane	*	
Meetings	Religion	Select		Caste	* select-	
	Education	-Select-		Person with Disabi	litySelect	
	Sex *	Select V		Poverty Line	*Select	
		Landline: -		SGSY to SGSY/Govt. Sponsor	red No 👻	
	Phone No for communication	Mob1: (10 diait n	umber only)			
				Occupation of the Fam	nilySelect	
	Present Occupation of the Candidate	Mob2: (10 digit n	iumber only)	Email		
		onemployed	• 1////4	Linda		
			(Please do not u	Upload Photo from Local Comput bload photos with more than 150KB size	ter e.)	Browse_
						7
					No	(OR)
					Photo	Take Photo from
					Available	WebCam

A pop up will appear as shown below,



Now click on **Allow** and the web camera will be activated. As show below, now click on **Take Photo** button.



A photo will appear as shown below; you can now click on **Use this photo** link or repeat the process by clicking on **Take photo** button until a desired photo is captured.



Upon clicking of **Use this Photo** link you will be directed to the below screen.

Other Programe									
Other Programs	Add Candidate								
Visitors	Institute Name	RUDSETI A	qra	Program Name	Dairy Farming	Batch No	352	Roll No *	17
our Programme									
aining Cost	Dereseal Details								
AC Meeting	Personal Details								
	Name of the ca	ndidate *				Father / Husband Nar	me		
	Date	e Of Birth	DD 🔻	-MMM- 👻YYYYY 👻		Age	*		
		Religion	Select 👻			Caste	*Select		
	E	Education	Select	•		Person with Disabil	itySelect		
		Sex *	Select 👻			Poverty Line	* -Select	t <b>v</b>	
			Landline:	-		SGSY Candida	ite No 👻		
	Phone No for comm	unication	Mob1:						
			Mob2:			Occupation of the Fam	ily -Select	<b> </b>	•
								Take Pho	to

Now click on **Save** button at the bottom of the screen to save the photo on the candidate profile.

# **3.4** How to ADD Boarding details of a training program.

Home	> Activitie	es > Programs												
														Æ
SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	lidates	Total Cand.	Boarding Details	Batch Summary	
1	1	SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View	Û
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	Ê

Click on **Activities**>>**Inhouse Programs** to reach the list of programs and then click on **ADD** [*Boarding Details*] corresponding to the training program, as shown in the picture above. This will direct you to the screen as shown below.

aining &	Boarding															
	Training Program	dairy fai	rming				Batch N	No. 2				No.	of Candidates	10		
	No. of Days	6														
ates Brea	ak Fast (Rs.)*		Morning	Tea (Rs.) <sup>*</sup>		Lun	ch (Rs.)*		Afternoor	ı Tea (Rs.)*		Dinner (	Rs.)*	Adv	vances, if a	ny (Rs.)
ates Brea	ak Fast (Rs.)*		Morning	Tea (Rs.)*		Lun	ch (Rs.)*		Afternoor	n Tea (Rs.)*		Dinner (	Rs.)*	Adv	ances, if a	ny (Rs.)
ates Brea	ak Fast (Rs.) <sup>4</sup>		Morning	Tea (Rs.)*		Lun	ach (Rs.)*		Afternoor	ı Tea (Rs.)*		Dinner (	Rs.)*	Adv	ay Dele	ny (Rs.) ] te Last D
ates Brea Day	ak Fast (Rs.)*	Tr	Morning Break Fast	Tea (Rs.)*	Tr	Lun C Morning Te: GF	ch (Rs.)*	Tr	Afternoor Lunch GF	Tea (Rs.)*	A Tr	Dinner (	Rs.)*	Adv Add Next D	ances, if a ay Dele Dinner GF	ny (Rs.) te Last D Tota

On this screen, you will need to first enter the rates of the respective items, viz,. Breakfast, Tea/Cofee, Lunch, Dinner, etc. as shown in the above picture.

Then in the bottom part of the screen you will need to enter the no of Trainees /Candidate and No. of Guest Faculties that were available for Break Fast, Morning Tea, Lunch, Afternoon Tea and Dinner. Once entered click on save.

For example:

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In a training program if there are 15 Trainees/Candidates and 2 guest faculties the entry would look like in the screen below.

			Break Fast	t ////		Morning Te	a		Lunch		A	fternoon To	ea		Dinner	
Day	Date	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total
1	05/12/2012	15	2	17	15	2	17	15	15	30	15	2	17	15	2	17

To enter subsequent day's boarding information, Click on **Settings**>>**Inhouse Programs** to reach the list of programs and then click on **ADD** [*Boarding Details*] corresponding to the training program. Then click on **Add Next Day** button to add the next day and there is a **Delete Last Day** button to delete the last day information. As shown in the picture below.

			Break Fast			Morning Tea	а		Lunch		A	fternoon Te	ea		Dinner	
Day	Date	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Tota
1	05/12/2012	15	2	17	15	2	17	15	15	30	15	2	17	15	2	17

### 3.5 How to ADD settlement to a Trainee after Follow up

Select **Activities**>>**Inhouse Programs** and for a particular training program for which you want to add settlement details, click on View Candidates as shown in the picture below.

Home	<ul> <li>Activitie</li> </ul>	es > Programs												
														45
SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	lidates	Total Cand.	Boarding Details	Batch Summary	
1	1	SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View	Û
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	Û

Clicking on **View** will bring the list of all the candidates in that particular training program. As shown in the below picture.

RSETI - De	mo - Dairy Fa	rming (1)								Bac
\$ SI. No.	▲ View	Edit		Photo	\$ Sex	\$ Age	≎ Caste	Contact No.		Delete
1	ଜେ	,	candidate	No Photo Available	Male	23	SC		In Process	Û
2	<i>6</i> .1	,	candidate	No Photo Available	Male	24	SC		In Process	Û
3	68	1	Demo Candidate	No Photo Available	Male	22	GEN	1234569870	Settled	â

Now click on  $\checkmark$  [Edit button] for the candidate that you wish to add settlement details. This will direct you to the edit page of candidate information. As shown in the picture below.

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lit Candidate								Add Settlem
Institute Name * RSETI - Demo		Pi	rogram Name	Dairy Farming	Batch No	1	Roll No	3
ersonal Details								
							N Ph Avai	lo oto lable
Name of the candidate *	candidate				Fath	er / Husband Name		

Now, Click on **Add Settlement** as shown in the picture above to add settlement for a candidate. This will direct you to the screen below.

dd Settlement					
Follow Up	Institute Visit		Date of Follow Up		
Batch No	1		Program Name	Dairy Farming	
Name of the project started after training			Employment Status	Select	
Place			Date		
nvestment For The Project					
Self			Bank		
Total					
Bank Details					
Bank Loan Provided	No				
Bank Name	Select	•	Branch		
City			Reason		
Others					
Earnings/Income (per month)		Whether Employment	given to others. If yes, specify the numbe	er 🗌	
Status					
Description					
Description					
			A		

You can also add settlement by following the below process

Select **Activities**>>**Inhouse Programs** and for a particular training program for which you want to add settlement details, click on View Candidates as shown in the picture below.

Home >	Activitie	s > Programs												
														45
SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	lidates	Total Cand.	Boarding Details	Batch Summary	
1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View	Û
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	Ê

Clicking on **View** will bring the list of all the candidates in that particular training program. As shown in the below picture.

≎ SI. No.	• View	Edit	≎ Candidate Name	Photo	\$ Sex	\$ Age	¢ Caste	Contact No.	≎ Settlement Status	≎ Settlement	Delete
8	ଜଙ	-	NAZMA KHATOON	No Photo Available	Female	36	MIN		In Progress	Add Settlement	â
1	ଙ୍କ	1	AFREEN	No Photo Available	Female	27	MIN		In Progress	Add Settlement	ŵ
3	କେ	/	MAHIRUN NISHA	No Photo Available	Female	40	MIN		In Progress	Add Settlement	ŧ

Now, Click on <u>Add Settlement</u> as shown in the picture above to add settlement for a candidate..

Note: The status selection plays a very important role. Below are the different statuses you can select.

- 1. Not Visited: This status is selected by default and remains until changed.
- **2. Settled Service:** The candidate has joined a wage employment / job, has no interest in Self-employment / Business.
- **3.** In progress Apprentice: The candidate has joined as Apprentice/Trainee to gain some experience and will start business after some time.
- **4. Settled**: Select this status only after the candidate is settled; once this status is selected and saved you will not be able to change it or add more details to settlement page.
- **5. In Progress**: Select this status when the candidate is in the process of setting up his project/business. When this status is selected you will be able to change it later and add more details to the settlement page.
- **6.** No **Progress:** Select this status when the candidate is not sure of setting up his project/business, however may setup something in 3-6 months. When this status is selected you will be able to change it later and add more details to the settlement page.
- **7. Wasted**: Select this status when the candidate is sure of not setting up a project / business of his own. When this status is selected you will not be able to change it later and add more details to the settlement page.

### **3.6 How to add Candidate Feedback:**

Click on **Activities** on the Horizontal Menu and then click on **Inhouse Program** on the left menu then click on **View** corresponding to a program as shown below.

shboard S	Settings	Acti	ivities	A	ccounts	Reports	Monthly Report									Down	oad Operating	Manual v1.0	1
Activities	٩	þ — q			ti diana Dara														
Planning			nome	S & AC	aviaes > Prog	granns								<u> </u>					<u></u>
Inhouse Pro	ograms																		4
Other Program	ms		SI. No.	Edit	Program Category	F	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Ca	ndidates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedbacl	k
Visitors			1		SE	Dairy Fan	mina	352	Agricultural EDPs	Self	23 Feb 2013	28 Feb 2013		View	34	Add	View	View	1e
Tour Program	me			27					-										-
Search Candi	dates		2	1	SE	TRAINING	PROGRAMME	351	Process EDPs	SIDBI	20 Feb 2013	21 Mar 2013		View	42	Add	View	View	Ē
Training Cost					05				Skill Upgradation Programmes						~		10		
Bulk Candidate	es Upload		3	1	SE	ADVANCI	E MOBILE SERVICING	350	& Growth Programmes	NABARD	14 Feb 2013	23 Feb 2013		view	31	Add	view	view	
LAC Meetings			4	1	SE	Beauty Pa	arlour Management	349	Process EDPs	Self	15 Jan 2013	13 Feb 2013		View	34	Add	View	View	í
			5	1	SE	Dress De	signing for Women	348	Product EDPs	Self	15 Jan 2013	04 Feb 2013		View	32	Add	View	View	É
			6	1	SE	DAIRY FA	ARMING	347	Agricultural EDPs	Self	24 Dec 2012	29 Dec 2012		View	38	Add	View	View	1
			7	1	WE	COMPUTE	ER DATA ENTRY	346	Process EDPs	NABARD	17 Dec 2012	15 Jan 2013		View	29	Add	View	View	Ê

You will be directed to the below screen.

ishboard	Settings	Activities	Accounts	Reports	Monthly Report					Download Operating Manual	v1.0 6
Activities		Home >	Inhouse Prog	ams > Candida	ates Feedback Details						
Planning											
Inhouse Pro	igrams	RUE	SETLAGRA - D	airy Farming	(352)						Bac
Other Progra	ams				(out)						
Visitors											
Tour Program	mme	▲ \$1. N	o. 🗘 Cand			+ Hostel Facility	Food Quality	EDP Training Inputs			
Search Can	didates										
Training Cos	st	1	SHRINA	VAS	1	Select +	Select +	Select 👻	Select +	Select +	Save
Bulk Candida	ates Upload	2	MUNESH	KUMAR	2	Select +	Select +	Select +	Select +	Select +	Save
LAC Meeting	gs	3	RAJESH	KUMAR	3	Select +	Select +	Select 👻	Select +	Select +	Save
		4	RAKES	BABU	4	Select +	Select +	Select +	Select +	Select +	Save

Now you can select appropriate values from the dropdown to capture feedback of the trainees/candidates.

▲ SI. No.		\$ Roll No	♦ Hostel Facility		EDP Training Inputs	\$ Skill Training Inputs	Resource Person	
1	SHRINIWAS	1	Select	Select 🔻	Select 👻	Select 👻	Select 🔻	Save
2	MUNESH KUMAR	2	Excellent	Select 🔻	Select 👻	Select 🔻	Select 🔻	Save
3	RAJESH KUMAR	3	Satisfactory	Select 🔻	Select 👻	Select 🔻	Select 💌	Save
4	RAKESH BABU	4	Excellent	Select 🔻	Select 👻	Select 👻	Select 💌	Save
5	SHEELESH KUMAR	5	Select V	Select 🔻	Select 👻	Select 👻	Select 🔻	Save
6	VUAY KISHOR	6	Select 👻	Select 🔻	Select 👻	Select 👻	Select 🔻	Save
7	DHIRENDRA	7	Select 👻	Select 👻	Select 👻	Select 👻	Select 🔹	Save

After capturing the feedback click on **Save** as shown below.

▲ SI. No.	Candidate Name	‡ Roll No	Hostel Facility	≎ Food Quality	EDP Training Inputs	\$ Skill Training Inputs	Resource Person	
1	SHRINIWAS	1	Excellent -	Very Poor 👻	Poor	Satisfactory 👻	Good 👻	Save
2	MUNESH KUMAR	2	Select 👻	Select +	Select +	Select +	Select +	Save
3	RAJESH KUMAR	3	Select 👻	Select 👻	Select 👻	Select •	Select 👻	Save
4	RAKESH BABU	4	Select 👻	Select 👻	Select 👻	Select 👻	Select 🔻	Save
5	SHEELESH KUMAR	5	Select 👻	Select 👻	Select	Select •	Select 💌	Save
6	VUAY KISHOR	6	Select 👻	Select 👻	Select 👻	Select 💌	Select 🔻	Save
7	DHIRENDRA	7	Select 👻	Select 👻	Select 🗸	Select 👻	Select 👻	Save
8	BALKISHAN	8	Select 👻	Select 💌	Select 👻	Select 💌	Select 💌	Save
9	GANGA SINGH	9	Select 🔻	Select 👻	Select 👻	Select 👻	Select 🔻	Save

You can also add feedback for all the candidates and then click on **Save All** button as shown below

27	PRADIP KUMAR	27	Select +	Select +	Select +	Select +	Select 👻	Save
28	MANOJ VASHISHTHA	28	Select 👻	Select 🗸	Select 👻	Select 👻	Select 👻	Save
29	ROOP KISHOR	29	Select +	Select 👻	Select 👻	Select 👻	Select 👻	Save
30	PUSHPENDRA SINGH	30	Select +	Select 👻	Select 👻	Select 🔻	Select 🔻	Save
31	NETRAPAL	31	Select 👻	Select 👻	Select	Select 🔻	Select 👻	Save
32	DHARAM CHANDRA	32	Select	Select	Select 👻	Select 🔻	Select 👻	Save
33	MANOJ KUMAR	33	Select 👻	Select 👻	Select 👻	Select 🔻	Select +	Save
34	JAGVEER SINGH	34	Select 👻	Save				
					ancel			
				Save All	Cancel			

# **3.7 How to add LAC meeting Details:**

Click on **Activities** on the Horizontal Menu and then click on **LAC meetings** on the left menu as shown below.

shboard Settin	gs Ac	tivities	A	ccounts	Reports Monthly Report									<u>Down</u>	load Operating	Manual v1.0	1
Activities	•	Hom		thuiting a Droom													
Planning			40	arvides > Progr	ans												<u></u>
Inhouse Program	s																Æ
Other Programs		SI.	Edit	Program	Program Name	Batch	Program Type	Sponsor	Start Date	End Date	Ca	ndidates	Total	Boarding	Batch	Cand.	
Visitors		no.		category		NO.							cand.	Details	Summary	reeuback	۰ مر
Four Programme		1	1	SE	Dairy Farming	352	Agricultural EDPs	Self	23 Feb 2013	28 Feb 2013		View	34	Add	View	View	Ē
Search Candidates		2	1	SE	MULTI PHONES SERVICE TRAINING PROGRAMME	351	Process EDPs	SIDBI	20 Feb 2013	21 Mar 2013		View	42	Add	View	View	É
Training Cost		2		cc	ADVANCE MORI E SERVICINO	250	Skill Upgradation Programmes	NARADO	14 Eab 2012	22 Eab 2012		Minur	21	Add	Mour	Manu	i e
Bulk Candidates Up	bad			JL	ADVANCE MODILE SERVICING	330	& Growth Programmes	MADARD	141602013	231602013		VIEW	31	Add	VIEW	VICW	
LAC Meetings		4	1	SE	Beauty Parlour Management	349	Process EDPs	Self	15 Jan 2013	13 Feb 2013		View	34	Add	View	View	fi

Then to add Meeting click on add 🕌 as shown below.

SI. No.	Edit	Meeting Date	Meeting Description	Participants
			No records found	

You will be directed to the below screen.

AC Meeting				
Organisation Name	RUDSETI	Institute Name	RUDSETI Agra	
Meeting Date *		Meeting Participants * (Click plus(+) to add more Participants)	Name	Designation
Meeting Description				
Commente				

Now u can add meeting details, first you select meeting date, name, and designation. For particular Meeting more than 1 person can be added by clicking on  $\stackrel{\bullet}{\longrightarrow}$  as shown below. Enter the name under the Name filed and select their designation from the dropdown.

Add LAC Meeting						
Organisation Name	RUDSETI	Institute Name	RUDSETI Agra			
			Name	Designation		
Meeting Date *	08/03/2013	Meeting Participants *	Anand	ZP Rep/DRDA 🗸		
		(click plus(+) to add more Participants)		Select 👻	×	
Meeting Description			.::			
Comments						
		Save Cancel				

In case you want to delete a person then click on  $\overset{\scriptstyle }{\longrightarrow}$  as shown in the above picture. And then fill all details click on **save** button as shown below

AC Meeting					
Organisation Name	RUDSETI	Institute Name	RUDSETI Agra		
			Name	Designation	
			Anand	ZP Rep/DRDA 🗸	
Meeting Date *	08/03/2013	Meeting Participants *	velu	Circle Head 🗸	
		(Click plus(+) to add more Participants)	amith	Circle Head 🗸	
			siva	Select 🔻	
Meeting Description	Meeting Description		.:		
Comments	Comments				

The entered details after saving will be displayed as below.

. No.	Edit	Meeting Date	Meeting Description	Participants	
1	1	08/03/2013	Meeting Description	Anand - ZP Rep/DRDA velu - Circle Head amith - Circle Head	â

If you what delete records click on **delete** as show below

If

SI. No.	Edit	Meeting Date	Meeting Description	Participants	v.
1	0	08/03/2013	Meeting Description	Anand - ZP Rep/DRDA velu - Circle Head amith - Circle Head siva -	Î

# **3.8 How to upload candidate Details from Excel sheet:**

Click on **Activities** on the Horizontal Menu and then click on **Upload Excel Cand.** on the left menu as shown below.

hboard Settings	Activ	rities	Accou	nts Report	5	_							Download Ope	rating Manual v1.	2
Activities		Home	> Activit	ies > Programs											_
Inhouse Programs															
Other Programs															45
Visitors		SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidate	Total Cand.	Boarding Details	Batch	
Tour Programme		1	1	SE	Multi Phones Service Training Programme	19	Process EDP	DRDA	26 Dec 2012	28 Dec 2012	- View	22	Add	View	f
Search Candidates		2	1	SE	Dress Designing for Women	18	Product EDP	DRDA	04 Dec 2012	24 Dec 2012	- View	32	Add	View	E
Training Cost		3	1	SE	Beauty Parlour Management	17	Process EDP	Self	30 Oct 2012	30 Nov 2012	- View	18	Add	View	-
Upload Excel Cand.		4	1	SE	Beauty Parlour Management	16	Process EDP	Self	12 Sep 2012	11 Oct 2012	- View	15	Add	View	1
		5		SE	Computer Hardware (A+) and Networking (N+)	15	Process EDP	Self	19 May 2012	17 Jun 2012	- View	35	Add	View	ť
		6	1	SE	Computer Hardware (A+) and Networking (N+)	14	Process EDP	Self	07 Apr 2012	06 May 2012	- View	27	Add	View	1

You will be directed to the below screen.

Dashboard	Settings	Activities	Accounts	Reports					Download Operating Manual v1.0	0 P
Upload Ca	ndidate Excel									
				,	Upload Excel					
				В	atch No		Select- 👻			
				U	pload File			Browse_		
						Upload Canc	l			

From the Batch No. dropdown choose a batch no to upload details.

Dashboard	Settings	Activities	Accounts	Reports					Download Operating Manual v1.0	1	P
Upload Ca	ndidate Excel										
				ι	Ipload Excel						
				В	atch No		Select				
				U	pload File		Select 18	Browse_			
							14				
						Upload Cance	el				

Once you choose the batch number, you will be prompted with the number of candidates that are required to be added in to this batch as shown below.

iboard scrangs Acaviacs Acc			Download Operating Manual v1.0
pload Candidate Excel			
	Upload Excel		
	Batch No	18 - 32 Candidates Required.	
	Upload File	Browse	

Now click on browse to select the excel sheet, you will be directed to the below screen

Dashboard Settings Activities Accounts Reports		Download Operating Manual v1.0 🤌 🎼
♥	Search excel	
Organize 🔻 New folder	🕮 🔻 🛄 🔞 🛛 18 👻 32 Candidates Required	I
🔶 Favorites	Date modified Type Browse_	
Downloads Chandrapur_maharashtra	1/29/2013 8:14 PM Microsof	
Desktop     Desktop     Recent Places	1/25/2013 1:49 PM Microsoft	
Curre 😸 Libraries Documents Music Pictures Videos		Copyright © 2011 Rudseti All rights reserved. <b>Credo Infotech</b>
Real Homeoroun • • • • • • • • • • • • • • • • • • •	All Files   Copen  Cancel	

Browse and choose your excel sheet, then click on open. From the resulting screen select Upload as shown below. You can also click on cancel if you wish to discard the changes and select a new file.

Dashboard	Settings	Activities	Accounts	Reports	Download Operating Manual v1.0	<b>e</b> (:
Upload Ca	ndidate Excel					
				Upload Exce	el	
				Batch No	18 - 32 Candidates Required.	
				Upload File	C:\Users\CredoVelu\Dov Browse_	
					Upload Cancel	
-						
					Upload Cancel	

If the excel sheet contains any any blank column or Row (only Mandatory fields, Marked in RED) an error message is shown as below

©	2012	Credo	Infotech.	All	rights	reserved
---	------	-------	-----------	-----	--------	----------

Dashboard	Settings	Activities	Accounts	Reports						 Download Operating Manual v1.0	1 IP
Upload Ca	ndidate Excel										
					Upload Excel						
				E	latch No		-	Select 👻			
				U	Ipload File				Browse_		
						Candidate_name Age row 1 Poverty_line ro Poverty_line ro Upi	Data Error: row 10 is blank, please 7 is blank, please correct ow 13 is blank, please co ow 19 is blank, please co toad Cancel	correct.  rrect. rrect.			

Error message contains the details of the column and row that are blank; you can correct these and upload the file again.

If your excel sheet are clear of all the errors and the candidates will be uploaded and **Upload successful** message will be displayed as shown below

Dashboard	Settings	Activities	Accounts	Reports					Download Operating Manual v1.0 🥂 👰 丨	Þ
Upload Car	ndidate Excel									_
					Upload Excel					
				B	Batch No		Select 👻			
				U	Jpload File			Browse_		
						32Records Uploaded Success Upload Cano	fully			

**Note:** if you choose batch no it shows required records (Ex.22 records required) the excel sheet must have only 22 rows filled (excluding column name row), else the system will not allow the upload.

# **3.9 How to upload candidate Settlement Details from Excel sheet:**

Click on **Activities** on the Horizontal Menu and then click on **Upload Settlement Excel.** From the left menu as shown below

ishboard	Settings	Activit	ies	Ac	counts	Reports	Certificates								Download O	perating Manual	<u>v2.1</u>	f
Activities		¢	-	lome	Act	ution > Droom												
Training/I	Inhouse Prog	rams			- Acc	ivides > Program	10	<u></u>										<u></u>
Other Prog	grams																	45
Visitors				SI.	Edit	Program	Program Name	Batch	Program	Sponsor	Start Date	End Date	Candidates	Total	Boarding	Batch	Cand.	
Tour Progra	amme					cutogory			Agricultural				-	ounu	octano	ourmany	recubuci	•
Search Ca	andidates			1	1	WE	rubber tapping	5	EDPs	Zilla Panchayat	04 Feb 2013	28 Feb 2013	Add View	24	Add	View	View	Ē
Bulk Candi	idates Upload			2		SE	nems & Artificial lewellary	4	Product EDPs	District / Zilla	08 Jan 2013	31 Jan 2013	View	25	Add	View	View	6
Upload Set	ttlement Excel				· .		genne er i ninnen je rrennin j			Panchayat			Additer					
LAC Meetin	ings			3	1	SE	Food Processing & Bakery Products	3	Product EDPs	SGSY	10 Jul 2012	19 Jul 2012	Add I View	22	Add	View	View	Ê
Prospectiv	ve Candidates			4	1	SE	Dairy Farming	2	Agricultural	Self	08 Mar 2012	15 Mar 2012	Add I View	23	Add	View	View	Ê

You will be directed to the below screen.

Dashboard	Settings	Activities	Accounts	Reports	Certificates	- Downba	Departing Manual V2.1	۰
Bulk Cand	idates Settle	ment Upload						
			Upload Set	tlement Exc	el			
			Batch No			Select +		
			Upload Exce	el File		Browse Note: Prease download charading the table scota filer selection of Batch Number. Then fil up settlement details, upload the same without charading file name. Important: Prease do not chanadistub first 4 column values in downloaded excot.		
						Upload Cancel		

Read instructions marked in Red. Then choose batch no as shown below.

Dashboard	Settings	Activities	Accounts	Reports	Certificates	- Downler	d Operating Manual V2.1	1
Bulk Can	lidates Settle	ment Upload						
			Upload Set	tlement Exc	el			
			Batch No			Select-		
			Upload Exce	l File		Note: Please download Candidate details excel after selection of Batch Number. Then fill up settlement details, upload the same without changing file name.		
						Important: Please do not change/disturb first 4 column values in downloaded excel.		
						Upload Cancel		

After selection of a batch a link to download an excel sheet will appear as shown below. Download Excel Template (Batch No:5)

5 -
Batch No Download Excel Template (Batch No:5)
Upload Excel File Node: Please do wnload Candidate details excel after selection of Batch Number. Then fill up settlement details, upload the same without changing file name. Important: Please do not change/disturb first 4 column values in downloaded excel.

Now click on <u>Download Excel Template (Batch No:5)</u> link. You will be directed to the below screen.



Now select Save File and click on ok button as shown below

				No. 2712. N. 761				· · · · · · · · · · · · · · · · · · ·		
Dashb	oard	Settings	Activities	Accounts	Reports	Certificates	_	Downloa	d Operating Manual V2 1	1 😢 👔
	Ope	ning settlemer	nt_5.xls	_	-		x			
Bulk	Yo	ou have chose	n to open: .t_5.xls							
		which is a: from: http	Microsoft (	Office Excel 97-2 imis.org	2003 Workshe	eet (53.5 KB)		•	1	
	-v	Vhat should Fi	refox do witl	h this file?				winload Excel Template (Batch No:5)		
		Open wi	th Micros	oft Office Excel	(default)	•		Browse		
		Save File						ore: Please download Candidate details excel after selection of Batch Number. Then fill up settlement details,		
		🔲 Do this g	utomaticall	y for files like th	nis from now	on.		pioad me same without changing me name.		
								portant, Please do not changeroisturo inst 4 column values in downloaded excel,		
					ОК	Cancel		Upload Cancel		

Now that you have downloaded the excel template. Go to your local folder and open the downloaded file. In this file columns for **Batch no, candidate Id**, **candidate name** and **roll No's** already filled don't change these **columns** and excel **File name** as shown below.

8	Home	• (24 • ) ∓ Insert	Page Layout Formulas Data Ri	view Vie	settlement_5 Compat	ibility Mode] - Microsof Pro 7 Team	it Excel	_	<u> </u>
Paste	∦ Cut i Copy ∛ Form Ilipboard	y nat Painter	$\begin{aligned} \ bhi & \cdot \ 1 & \cdot \ A^* A^* \  & \equiv \\ I & \underline{U} & \cdot \ \underline{M}^* \  & \underline{\Delta}^* A^* \\ & Font & G \end{aligned} \\ \begin{bmatrix} E \\ E \\ E \\ E \\ \hline E \hline \hline E \\ \hline E \\ \hline E \hline \hline E \\ $	<mark>≡</mark> ≫- ≣ i≢ i≢ Aligni	Wrap Text G Merge & Center * ment G	Seneral → S → % → 100 400 Number 5	Conditional Format Formatting * as Table * St Styles	Cell Insert Delete Format Cells	∑ AutoSum * Fill * Clear * Editing     Sort & Find & Filler * Select * Editing
	W10	• (*	Jx						
4	A	B	C	D	E		F	G	
1 Bat	ch No 🛛	Candidate Id	Candidate Name	Roll No	Follow_Up Type	Date	e of Follow Up	Name of the project sta	rted after training Employm
2 5	ſ	195428	Vadivel Prospective	1					
3 5	r	74797	candidate	2					
4 5	ł	109171	vadivel	3					
5 5	ł	117466	Srinivas Shenov	4					

Now you can fill candidate settlements details in this excel. Columns that are marked Red are mandatory fields.

Go to **Upload Settlement Excel** in our application click on **Browse** button as shown below.

Bulk Candidates Settlement Upload		
	Upload Settlement Excel	
	Batch No	5   Download Excel Template (Batch No.5)
	Upload Excel File	Bowe
		Upload Cancel

Browse and choose your excel sheet, then click on open. From the resulting screen select Upload as shown below. You can also click on cancel if you wish to discard the changes and select a new file.

Upload Settlement Excel	
Batch No	5   Download Excel Template (Batch No:5)
	C:\Users\CredoVelu\Dov Browse_
Upload Excel File	Note: Please download Candidate details excel after selection of Batch Number. Then fill up settlement details, upload the same without changing file name.
	Important; Please do not change/disturb first 4 column values in downloaded excel.
	Upload Cancel

If the excel sheet contains any blank column or Row (only Mandatory fields, Marked in RED) an error message is shown as below

Upload Settlement Excel	
Batch No	Select 👻
Upload Excel File	Browse
	Data Error: Please select Employment Status for below Settled/Apprentice Candidate(s): Srinivas Shenoy (117466) Optionu Cancer

In case of error, make changes accordingly and try to upload the file again. If your excel sheet are clear of all the errors then the candidates will be uploaded and **Upload successful** message will be displayed as shown below

Upload Settlement Excel	
Batch No	Select- 🔻
Upload Excel File	Browse
	4 Settlement Details Uploaded Successfully.
	Upload Cancel

**Note:** if you select **upload** button make sure **batch no** is selected else the system will not allow the upload.

# 3.10 How to ADD Prospective Candidates

Dashboard	Settings	Activities	Accounts	Reports	Monthly Report	Communication				Download Operating Ma	mual v1.0
Activities											
Plannin	g		Home > Activi	ties > Prospec	tive Candidates						
Inhouse	e Programs										45
Other P	Programs		SI. No.	Edit	Name	Father Name	Age	Caste	Nativity Area	Marital Status	
Visitors	5		1	1	selvaraj	arumugam	21	OBC	Rural	Married	Û
Tour Pr	ogramme		2	1	FASDES	к	21	SC	Urban	UnMarried	Ê
Search	Candidates		3	1	moorthi	к	22	ST	Urban	UnMarried	Ê
Training	g Cost		4	1	suruli	к	21	ST	Rural	Married	Ê
Upload	Excel Cand.		5	1	karthik	к	20	OBC	Rural	Married	Ê
LAC Me	eeting										
Prosp	ective Candid	lates									

Select **Activities** from the horizontal menu and then click on **Prospective Candidates** from the left menu. From the above screen click on F as shown above to add more **Prospective Candidates**.

Clicking on **ADD** as shown in the above picture it will direct you to the screen as shown below where you can enter information of a prospective candidate and click on Save to save the prospective candidate; clicking on Save & Add More will save the prospective candidate information and also bring in a new application to add new prospective candidate.

	Institute Name	RUDSETI Agra	
rsonal Details			
Name of the candidate *		Father / Husband Name *	
Date Of Birth	DD •MMM- •YYYY •	Age *	
Religion	Select +	Caste *	Select +
Education	Select V	Person with Disability	Select 💌
Sex*	Select	Poverty Line *	-Select
Marital Status	Landline:	SGSY to SGSY/Govt Sponsored	No
Phone No for communication	Mob1: (10 digt number only) Mob2: (10 digt number only)	Occupation of the Family	Select
Present Occupation of the Candidate	Unemployed	Email ID	
			Take Photo from Wel
ntart Natalle			Available
ntact Details	-Caleff		Available
ntact Details Nativity Area <sup>®</sup> Address	-Select-		Available
ntact Details Nativity Area * Address	-Select-	ai Maa / D	Available
ttact Details Nativity Area * Address Villeen nmenta/Remarks	-Select- •	.ti Nate (C	Available des resources rate
ntact Details Nativity Area * Address ments/Remarks Comm	-Select- •		Available des mession na

#### Edit prospective Candidate information

								4
SI. No.	Edit	Name	Father Name	Age	Caste	Nativity Area	Marital Status	
1	1	selvaraj	arumugam	21	OBC	Rural	Married	â
2	1	FASDES	к	21	SC	Urban	UnMarried	Ê
3	1	moorthi	к	22	ST	Urban	UnMarried	â
4	1	suruli	к	21	ST	Rural	Married	â
5	1	karthik	к	20	OBC	Rural	Married	Ê

By clicking the  $\checkmark$  as shown in the above screen the candidate / trainee screen will be displayed in the edit mode.

#### **3.11** How to Add Candidates from prospective candidates:

ashboard Settings	Activities	Ac	counts	Reports	Certificates								Download O	perating Manual	V2.1	F 📢
Activities	¢¤	Home		uitine > Dreame												
Training/Inhouse Prog	grams		ACI	viues > Program												
Other Programs																45
Visitors		SI.	Edit	Program	Program Name	Batch	Program	Sponsor	Start Date	End Date	Candidates	Total	Boarding	Batch	Cand.	
Tour Programme		NO.		Category		NO.	Type					Cano.	Details	summary	reeubac	ĸ
Search Candidates		1	1	WE	rubber tapping	5	Agricultural EDPs	Zilla Panchayat	04 Feb 2013	28 Feb 2013	Add 😰 View	24	Add	View	View	Ô
Bulk Candidates Upload		2		CE.	name & Artificial jawallany	4	Product EDPa	District / Zilla	08 Jan 2013	31 Jan 2013	(B) View	25	٨dd	View	View	-
Upload Settlement Excel		-	·	SL.	genis & Antincial jewellary	-	FIGURE	Panchayat	00 341 2013	51 541 2015	Add EP VION	25	Add	V 10 VV	V 10 W	
LAC Meetings		3	1	SE	Food Processing & Bakery Products	3	Product EDPs	SGSY	10 Jul 2012	19 Jul 2012	Add 😰 View	22	Add	View	View	Ô
Prospective Candidates		4	1	SE	Dairy Farming	2	Agricultural EDPs	Self	08 Mar 2012	15 Mar 2012	Add 😰 View	23	Add	View	View	Ê

Select Activities from the horizontal menu and then click on Training/Inhouse

**Programs** from the left menu. From the above screen, click on is to add from **Prospective Candidates List**. Clicking on **ADD** as shown in the above picture, this will direct you to the screen as shown below.

Activities	*										
Training/Inhouse Program	ns —	e > innouse P	rograms > Pro	pective Cand	dates						
Other Programs		Search Pros	spective Can	didates							
/isitors			Faar	h Ru Nama			Training Internated Type				
our Programme			Sear	in by Maille	•		training interested type		•		
Search Candidates						Search	h Show All				
lulk Candidates Upload	Sel	ect / Add Pr	ospective (	andidates	for rubber tapr	ning (5)					
Ipload Settlement Excel			ospective (	unandutes	for rubber tapp	3119 (5)					
AC Meetings	SII	lo Name	Age Se	x Caste	Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Selec
Prospective Candidates	1	selvaraj	21 Fem	ale SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	

If you want to search candidates, you can use **search prospective candidates** as shown below.

Activities					0						_
Training/Inhouse Programs	nome	> innouse P	rograms >	Prospective	Candidates						
Other Programs	S. 5	earch Pros	spective C	andidates							
Visitors				anala Da N			Testsian Islandad Tests				
Tour Programme			5	earch by Iv			training interested type		•		
Search Candidates						Search	Show All				
Bulk Candidates Upload	Selec	t / Add Pr	ospectiv	e Candida	ates for rubber tann	aing (5)					
Jpload Settlement Excel			oopoour	o ounana	accontransfer capp				-		
AC Meetings	SI No	Name	Age	Sex Ca	iste Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Sele
Prospective Candidates	1	selvaraj	21 F	emale S	SC APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	

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After searching you can select the candidates by selecting check box in the list as shown below

Activities	Home	> Inhouse I	Program	a > Prospec	tive Candi	lates						
'raining/Inhouse Programs		- inteduct	rogram	a - mospee	are cana	Juico						
ther Programs	<u></u> 5	Search Pro	spectiv	e Candida	tes							
sitors				Carach D.	Harry			Testale a laterated Taxa				
ur Programme				Search by	Name	•		training interested type		•		
earch Candidates							Search	Show All				
ulk Candidates Upload	Solo	-t / Add P	roenor	tivo Can	lidatos	for rubber tann	ing (5)					
bload Settlement Excel	50100	.cr Add i	rospec	uve cum	nuucs	or rubber tupp	mg (5)					
AC Meetings	SI No	Name	Age	Sex	Caste	Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Selec
ospective Candidates	1	selvaraj	21	Female	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	

After selecting candidates click on **Add** button as shown below.

ctivities												
raining/Inhouse Programs	Home	> innouse i	rogram	s > Prospec	tive Candi	dates						
Other Programs	<u>s</u> :	Search Pro	spectiv	e Candida	ites							
/isitors												
our Programme				Search By	/ Name			I raining interested Type		*		
earch Candidates							Search	Show All				
ulk Candidates Upload	Solo	ct / Add P	rospor	tive Can	antehih	for rubber tann	aing (5)					
pload Settlement Excel			rospec	ure cui	andates	ior rubber tapp	ang (s)					
AC Meetings	SIN	o Name	Age	Sex	Caste	Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Se
connective Candidates	1	selvaraj	21	Female	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	5

The selected candidates will be moved to the program.

#### 3.12 How to ADD TRAINING COST

In this section you will be able to maintain a record of all the training cost reimbursements/refunds from various organizations.

FROM MORD:

shboard Settings	Activities	Accounts	Reports	Monthly Report	Communication	1					<u>D</u>	ownload Operat	ting Manual V2.2 🐲	
Program Cost	<b>*</b>	> A stivities >	Dearer Cant											
Fraining/Inhouse Programs	Home	> Activities > 1	Program Cost											<u></u>
Other Programs			500000											
Visitors	FR	OWINORD	FROMUT	THERS										
Tour Programme														
Search Candidates														
Training Cost	SI. No		Program	n Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	DDI Defined		
Dull One distance Halter d	1	Dainy Farmir									-	DPL Refutio	Status	
Bulk Candidates Upload		Dairy Farmin	ng		201	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select	•
Upload Settlement Excel	2	Dairy Farmin	ng Ig		201 200	Jan 18, 2013 Jan 18, 2013	Jan 23, 2013 Jan 23, 2013	6	20 30	20 6		24000 7200	Select	•
Upload Settlement Excel	2	Dairy Farmin Dairy Farmin	ng 1g 1g		201 200 199	Jan 18, 2013 Jan 18, 2013 Jan 18, 2013	Jan 23, 2013 Jan 23, 2013 Jan 23, 2013	6 6	20 30 20	20 6 20		24000 7200 24000	Select Select	
Upload Settlement Excel LAC Meetings Prospective Candidates	2 3 4	Dairy Farmin Dairy Farmin Dairy Farmin	ng 1g 1g v Parlor		201 200 199 194	Jan 18, 2013 Jan 18, 2013 Jan 18, 2013 Dec 15, 2012	Jan 23, 2013 Jan 23, 2013 Jan 23, 2013 Dec 20, 2012	6 6 6	20 30 20	20 6 20		24000 7200 24000 12000	Select Select Select	

Select **Activities** from the horizontal menu and then click on **Training Cost** from the left menu and then select **FROM MORD** from the horizontal menu, as shown in the picture above.

Now, from the resultant screen show below; the lists of programs conducted are shown (Note: Program should have at least 1 BPL candidate to be shown in this list). Here the maximum refund amount that can be claimed is automatically calculated and shown.

SI. No.	Program Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	BPL Refund	Status	
1	Dairy Farming	201	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select	•
2	Dairy Farming	200	Jan 18, 2013	Jan 23, 2013	6	30	6		7200	Select	-
3	Dairy Farming	199	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select	•
4	EDP - Beauty Parlor	194	Dec 15, 2012	Dec 20, 2012	6	10	10		12000	Select	-
5	Dairy Farming	193	Dec 15, 2012	Dec 20, 2012	6	20	20		24000	Select	•
6	Dairy Farming	192	Dec 10, 2012	Dec 15, 2012	6	22	22		26400	Select	-
7	Dairy Farming	191	Dec 10, 2012	Dec 15, 2012	6	30	30		36000	Select	•
8	Dairy Farming	190	Dec 04, 2012	Dec 09, 2012	6	32	32		38400	Select	•
9	Goat Farming	188	Nov 30, 2012	Dec 05, 2012	6	20	20		24000	Select	•
10	Goat Farming	187	Nov 30, 2012	Dec 05, 2012	6	22	22		26400	Select	-
11	Computer Hardware (A+) & Networking (N+)	185	Nov 04, 2012	Dec 18, 2012	45	34	7		35000	Select	•
12	Domestic Electrical Appliance Repair	184	Oct 06, 2012	Nov 04, 2012	30	22	5		25000	Select	-
13	BEE KEEPING	183	Sep 22, 2012	Sep 27, 2012	6	59	3		3600	Select	•
14	Multi Phone Service	182	Sep 21. 2012	Oct 20. 2012	30	24	10		50000	Select	-

From the above screen you have to enter **Trng.cost**, this will serve as a reference in future. Once the documents are ratified and submitted to the respective agency for refund you can change **status** by selecting **Submitted for Refund** as shown below.

SI. No.	Program Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	<b>BPL Refund</b>	Status
1	Dairy Farming	201	Jan 18, 2013	Jan 23, 2013	6	20	20	50000	24000	Select
2	Dairy Farming	200	Jan 18, 2013	Jan 23, 2013	6	30	6		7200	Select Submitted for Refund
3	Dairy Farming	199	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select 👻
4	EDP - Beauty Parlor	194	Dec 15, 2012	Dec 20, 2012	6	10	10		12000	Select 👻
5	Dairy Farming	193	Dec 15, 2012	Dec 20, 2012	6	20	20		24000	Select 🗸
6	Dairy Farming	192	Dec 10, 2012	Dec 15, 2012	6	22	22		26400	Select 👻

Once the record is saved the status will be shown as shown in the below screen.

SI. No.	Program Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	BPL Refund	Status
1	Dairy Farming	201	Jan 18, 2013	Jan 23, 2013	6	20	20	50000	24000	Submitted for Refund 👻
2	Dairy Farming	200	Jan 18, 2013	Jan 23, 2013	6	30	6		7200	-Select 👻

Once you have received the funds, you can come back and change the status to **refund received** as shown below.

SI. No.	Program Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	BPL Refund	Status
1	Dairy Farming	201	Jan 18, 2013	Jan 23, 2013	6	20	20	50000	24000	Submitted for Refund 🖵
2	Dairy Farming	200	Jan 18, 2013	Jan 23, 2013	6	30	6		7200	Select Submitted for Refund
3	Dairy Farming	199	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Refund Received
4	EDP - Beauty Parlor	194	Dec 15, 2012	Dec 20, 2012	6	10	10		12000	Select 👻
5	Dairy Farming	193	Dec 15, 2012	Dec 20, 2012	6	20	20		24000	Select 🗸

After updating the status, it will be shown as below.

SI. No.	Program Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	BPL Refund	Status
1	Dairy Farming	201	Jan 18, 2013	Jan 23, 2013	6	20	20	50000	24000	Refund Received
2	Dairy Farming	200	Jan 18, 2013	Jan 23, 2013	6	30	6		7200	Select +
3	Dairy Farming	199	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select 👻
4	EDP - Beauty Parlor	194	Dec 15, 2012	Dec 20, 2012	6	10	10		12000	Select 👻

#### FROM OTHERS:

Dashboard	Settings	Activities	Accounts	Reports	Monthly Report	Communication				Download Operating	n Manual V2.2	ø
Program C	ost Suse Programs	¢ Hon	ne > Activities >	Program Cost								
Other Progr	ams			EDON/	OTHERS							
Visitors			FROM MORD	PROMO	JIHERS							
Tour Progra	mme											-
Search Can	didates											<b>(</b>
Training Cos	it .						Trai	ning Cost				
Bulk Candid	ates Upload		SI. No.	Program Na	me Batcl	h No. Claimed	Claimed Date	Received	Received Date	Description	Document	
Upload Sett	ement Excel						No records fo	ound.				
LAC Meeting	js											
Prospective	Candidates											
Annual Acti	on Plan											

Select **Activities** from the horizontal menu and then click on **Training Cost** from the left menu and then select **FROM OTHER** from the horizontal menu. Now, from the above screen click on ਓ to add a records.

Now, from the below resultant screen select the **batch no** for which you want to record to training cost and refund details and all the other relevant details in the fields and click on save.

Activities	Home > Activities > Training Cost		
raining/Inhouse Programs			
Other Programs	Add Training Cost		
Visitors	Organisation Name	RUDSETI Institute Name	RUDSETI Baran
Four Programme		Colort Descent Name	
Search Candidates	Batch Number "	Program Name	
Fraining Cost	Training Cost Claimed *	Claimed Date *	
Bulk Candidates Upload	Training Cost Received *	Received Date *	
Jpload Settlement Excel	Training Cost given by	Select Vpload File, if any	Browse.
AC Meetings			
rospective Candidates	Description		
Annual Action Plan			

#### \* indicates mandatory fields

Now, you will be directed to a screen as shown below.

Dashboard	Settings	Activitie	Acco	unts Repor	ts Monthly	Report	Communicatio	on			Download Operating Manual V	12.2
Program Training/	n Cost Inhouse Program	ф Н	ome > Act	ivities > Program	Cost							
Other Pro	ograms		FROM M	IORD FR	OM OTHERS							
Tour Prog	gramme	-										_
Search C	Candidates											45
Training	Cost						Tra	aining Cost				
Bulk Can	didates Upload		SI. No.	Program Name	Batch No.	Claimed	Claimed Date	e Received	Received Date	Description	Document	
Upload S	ettlement Excel		1 Da	airy Farming	201	12000	11/04/2013	10000	26/04/2013	nothing	<u>i</u>	1
LAC Mee	tings											
Prospect	tive Candidates											
Annual A	Action Plan											
						Training	Cost					
SI. No.	Program Na	ime B	atch No.	Claimed	Claimed D	ate R	eceived R	Received Date		Description	Document	
1 E	airy Farming		201	12000	11/04/2013	10	000 26/	04/2013	nothing		<u>à</u>	1

If you want to edit details click on edit  $\checkmark$  button as shown above. You can also update any reference document by clicking on the button  $\boxed{}$ .

#### 3.13 How to ADD Annual Action Plan

ashboard	Settings	Activities	Accounts F	Reports	Monthly Report	Communication			Download O	perating Manua	1V2.2
Activities											
Training/Inh	iouse Program	s —	e > Activities > An	Inual Action	Plan						
Other Progr	rams	A	nual Action Plan								
Visitors			Organisatio	on Name	RUDSETI		Institute Name	RUDSETI Baran	Financial Year	Select	-
Tour Progra	amme										
Search Car	ndidates										
Training Co	st										
Bulk Candid	dates Upload										
Upload Sett	tlement Excel										
LAC Meetin	igs										
Prospective	e Candidates										
Annual Ac	ction Plan										

Select **Activities** from the horizontal menu and then click on **Annual Action Plan** from the left menu as shown above.

ual Action Plan						
Organisation Name	RUDSETI	Institute Name	RUDSETI Baran	Financial Year	Select	-
					Select	
					2013 - 2014	

Now, from the above screen choose **Financial year** to add annual action plan, after choosing the financial year it will show as shown as below.

			Organisatio	n Name	RUDSETI Ba	iran					Institu	te Name R	UDSETI		
			Financ	ial Year	2013 - 2014	•									
Program Sub Type	Cat.	No. of Prgms	No. of Days per Prgm	Total Days	No. of Candidates per Prgm	Total Cand.	Honorarium for External Faculty / Assistant (Rs.)	Boarding Expenses (Rs.)	Lodging Expenses for Trainees (Rs.)	Printing / Stationary Expenses (Rs.)	Rent for Training (Rs.)	Travelling Allowance for Trainees (Rs.)	Travelling / Monitoring and Follow-Up Expenses (Rs.)	Misc. / Travel Expenses (Rs.)	Opening Closing Expenses (Rs.)
griculture	EDP	+													
rocess ED	P														
roduct EDI	P														
eneral EDI	P T														
un opgrad	aution	· · · · · · · · · · · · · · · · · · ·													

Above screen shows program subtype, click on respective add the planned program.

Program Sub Type	Cat.	No. of Prgms	No. of Days per Prgm	Total Days	No. of Candidates per Prgm	Total Cand.	Honorarium for External Faculty / Assistant (Rs.)	Boarding Expenses (Rs.)	Lodging Expenses for Trainees (Rs.)	Printing / Stationary Expenses (Rs.)	Rent for Training (Rs.)	Travelling Allowance for Trainees (Rs.)	Travelling / Monitoring and Follow-Up Expenses (Rs.)	Misc. / Travel Expenses (Rs.)	Opening / Closing Expenses (Rs.)
Agriculture	EDP	+													
Process ED	)P 🕇														
Product EDI	р 🕂														
General EDI	р 🕂														
Skill Upgrad	datior	1 <b>+</b>													
Other Exper	nses	+													

Upon clicking the button you will be directed to the below screen. Now, in below screen enter all the fields with relevant information about the **Annual Action Plan** and click on save if you want to close click on close.

Program Sub Type	Cat.	No. of Prgms	No. of Days per Prgm	Total Days	No. of Candidates per Prgm	Total Cand.	Honorarium for External Faculty / Assistant (Rs.)	Boarding Expenses (Rs.)	Lodging Expenses for Trainees (Rs.)	Printing / Stationary Expenses (Rs.)	Rent for Training (Rs.)	Travelling Allowance for Trainees (Rs.)	Travelling / Monitoring and Follow-Up Expenses (Rs.)	Misc. / Travel Expenses (Rs.)	Opening / Closing Expenses (Rs.)	
Advanced Dairy Management -	SE 👻	3	30	90	32	96	20000	2000	3000	3455	4567	2333	100			Save X

Now, you will be directed to a screen as shown above.

Program Sub Type	Cat.	No. of Prgms	of Days per Prgm	Total Days	No. of Candidates per Prgm	Total Cand	for External Faculty / Assistant (Rs.)	Boarding Expenses (Rs.)	Expenses for Trainees (Rs.)	Printing / Stationary Expenses (Rs.)	Rent for Training (Rs.)	Allowance for Trainees (Rs.)	Monitoring and Follow-Up Expenses (Rs.)	Misc. / Travel Expenses (Rs.)	Opening / Closing Expenses (Rs.)	
griculture EDP 🕇																
dvanced Dairy Management	- SE -	3	30	90	32	96	20000	2000	3000	3455	4567	2333	100	0	0	1
ocess EDP 🕂																
oduct EDP 🕂																
eneral EDP 🕂																
till Upgradation 🕂															•	
her Expenses 💠																

You will be able to Edit the plan by clicking on the  $\checkmark$  and Delete the plan by clicking on the  $\overline{m}$  as shown above.

Repeat the process for all the other EDPs.

Note: Any details once deleted cannot be reverted back.

# 4. Accounts

This is a basic accounting module that has been provided as add on to the MIS. Below are some of the operations that can be handled in this module.

# 4.1 How to add Bank Account Details

Dashboard Settings	Activi	ties Acc	counts F	Reports				۵
A								
Accounts		Home > Ac	counts > Ba	ink A/C				
Bank A/C							Click boro to add moro R	ank Accounte
Current Budget Per	riod						Click here to add hore b	
Cash Balance				Bank Name	Brach	City	Bank Balance	
Credit Slip		1	1	ABC Bank	Branch	City	Add / Edit Balance	Û
Debit Slip		2	1	XYZ Bank	Branch	City	Add / Edit Balance	Ê

Click on **Accounts** on the Horizontal Menu and then click on **Bank A/C** on the left menu. You will be directed to a screen as shown above.

Then Click on 🔨 to add more Bank Accounts. You will be directed to the below screen.

dd Bank Account		
Bank Name *		
Address		
Branch *	City	
State	Pin Code	

Enter all the relevant details and click on Save.

#### \* indicates mandatory fields

Once the Bank account has been created, you will be directed to the Bank Account list page as shown below. Now click on **Add/Edit Balance**, to add or edit opening balance of a particular bank account.

						1
		Bank Name	Brach	City	Bank Balance	
1	1	ABC Bank	Branch	City	Add / Edit Balance	Ê
2	1	XYZ Bank	Branch	City	Add / Edit Balance	â
3	1	RST Bank	Branch	City	Add / Edit Balance	Ê

Upon clicking of Add/Edit Balance you will be directed to a page as shown below. Now click on E to arrive at the below screen.

ome > Accounts > Bank A/C			
Add Bank Amount			
Institute	RSETI - Demo	Bank	ABC Bank
Year	Select	Amount *	

Now select the year and enter the amount and click on **save**.

#### 4.2 How to add current Budget period

Click on **Accounts** on the Horizontal Menu and then click on **Bank A/C** on the left menu. You will be directed to a screen as shown below.

Dashboard Settings Activi	les Accounts Reports	0 P
Accounts *	Home > Accounts > Current Budget Period	
Current Budget Period	View Budget Period	
Cash Balance	Current budget year starts from	
Credit Slip	Current budget year ends on	

Now click on 🖍 to add/edit the **Current Budget Period**.

#### 4.3 How to Add Cash Balance

Click on **Accounts** on the Horizontal Menu and then click on **Cash Balance** on the left menu. You will be directed to a screen as shown below.

Das	hboard Settings	Activ	vities Accounts	Reports		🧶 🕞
		<u>_</u>				
1	Accounts	1	Homo > Accounto >	a - Cash Balance		
	Bank A/C		Home > Accounts >	s - Casil Dalaile		
	Current Budget Peri	d	View Cash Balan	ince	1	
	Cash Balance			Opening Cash Balance		
	Credit Slip			epointy earlier		
	Debit Slip					

Now click on 🥓 to add/edit the **Cash Balance**.

#### 4.4 How to Add Credit Slips

Click on **Accounts** on the Horizontal Menu and then click on **Credit Slip** on the left menu. You will be directed to a screen as shown below.

Dash	ooard Settings	Activiti	ies Accounts	Reports			🤹 🖗
A	counts	\$	Home > Accounts >	> Credit Slip			
	Current Budget Perio		💃 Search Credi	it Slips			
	Cash Balance	-				Credit Slips From To	
	Credit Slip						
	Debit Slip					Search Show All	
				Date	Slip No	Amount Credited	Mode of Credit
						No records found.	

Now click on 🔄 to add **Credit Slip**. Upon clicking you will be directed to the below screen where you will be able to enter the details of the credit slip.

Credit Amount			
Date *		Slip No	1
Mode of Payment *	Select		
Amount *		Suspense Credit	Yes / No
Remarks / Towards			

#### Search for Credit Slips

You will be able to search for Credit slips of a particular date range. By selecting the date and clicking on Search.

Home > Accounts > Credit Slip
💃 Search Credit Slips
Credit Slips From 01/03/2012 To 31/10/2012
Search Show All

This action will get all the credit slips of a particular date range you have selected.

#### 4.5 How to Add Debit Slips

Click on **Accounts** on the Horizontal Menu and then click on **Debit Slip** on the left menu. You will be directed to a screen as shown below.

Dashboard Settings	Activiti	es Accounts R	eports					🧶 🖗
Accounts Bank A/C	\$	Home > Accounts > Del	pit Slip					
Current Budget Period Search Debit Slips								
Cash Balance								
Credit Slip				Debit Slips From	То			
Debit Slip					Search Show All			
								45
		Date	Slip No	Expenditure Type	Account Head	Amount Debited	Mode of Debit	
					No records found.			

Now click on 🕌 to add **Debit Slip**. Upon clicking you will be directed to the below screen where you will be able to enter the details of the debit slip.

ebit Amount			
Date *		Slip No	1
Mode of Payment *	Select	Capital Expenditure Revenue Expenditure	Select
Amount *		Suspense Debit	Yes / No
Remarks / Towards			

Once you have entered and selected the relevant items, click on **Save**.

#### Search for Debit Slips

You will be able to search for Debit slips of a particular date range. By selecting the date and clicking on Search.

💃 Search Debit Slips		
Debit Slips From	То	
	Search Show All	

This action will get all the Debit slips of a particular date range you have selected.