



Ministry of Rural Development
Government of India

Aajeevika
National Rural Livelihoods Mission (NRLM)



RSETI MIS OPERATING MANUAL

By Credo Infotech

User Manual

Version 2.1



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PREFACE

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.



- 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.

Home > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	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
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

1.3 How to Login in to the MIS

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

The resultant screen will be as below.

Ministry of Rural Development
Government of India

Aajeevika
National Rural Livelihoods Mission (NRLM)

Monitoring Cell for RSETIs
National Academy of Rurseti

Login

Login Id

Password

[Login](#) [Forgot Password?](#)

The website is best viewed with Mozilla Firefox and Google Chrome.

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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

	Add New Record
	Delete Record
	Edit Record
	View Record
	Home Button
	Sign out / Logout Button

2. Settings

2.1 How to ADD USERS

The screenshot shows the 'Settings' page with a horizontal menu at the top containing 'Dashboard', 'Settings', 'Activities', 'Accounts', 'Reports', 'Monthly Report', and 'Communication'. The 'Settings' page has a left sidebar with 'Settings', 'Change Password', 'Users', and 'Employee'. The main content area is titled 'Home > Settings > Create Users'. It features a form for 'Institute Info' with fields for Institute Name, Director, Director Mobile No, State, Email Id, Bank / Organisation Name, Date of Establishment, LandLine No, and District. Below the form is a tabbed interface with 'USERS LIST', 'INFRASTRUCTURE', and 'FACULTY TRAINING DETAILS'. The 'USERS LIST' tab is active, showing a table of users.

	User Name	User Type	Institute Name	Designation	Created On	Last Updated On	
1	Agra admin	Institute Admin	RUDSETI Agra	Faculty	20/04/2012	20/04/2012	
2	B.M. Pandey	Institute User	RUDSETI Agra	Senior Faculty	06/02/2013	06/02/2013	
3	Gurudev Pachauri	Institute User	RUDSETI Agra	Faculty	06/02/2013	06/02/2013	
4	Viresh Kumar Singh	Institute User	RUDSETI Agra	Senior Office Assistant	15/02/2013	15/02/2013	

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 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.

The screenshot shows the 'Add User' form with fields for User Type, Name, Designation, Login Id, Password, and Confirm Password. The 'User Type' dropdown is open, showing options: '--Select--', '--Select--', 'Institute Administrator', and 'Institute User'. The 'Name' field is highlighted with a red box. The 'Save' and 'Cancel' buttons are at the bottom.

* indicates mandatory fields

Edit User

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

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

Delete User

You will be able to **Delete** the user by clicking on the as shown below.

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

Note: Any details once deleted cannot be reverted back.

2.2 How to UPDATE INFRASTRUCTURE Details:

Dashboard **Settings** Activities Accounts Reports Monthly Report Communication

Download Operating Manual v2.0

Settings
Change Password
Users
Employee

Home > Settings > Create Users

Institute Info

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	District:	AGRA
Email Id:	rudsetiagra@yahoo.co.in		

[Edit](#)

USERS LIST **INFRASTRUCTURE** FACULTY TRAINING DETAILS

Infrastructure Info

Whether the institute is functioning from own premises/rented one	Owned	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
Attendees	1	Watchman	1

[Edit](#)

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 [Edit](#) to update infrastructure details. The edit screen will be activated only after clicking the [Edit](#) link.

Update the relevant details and click on Save.

USERS LIST **INFRASTRUCTURE** FACULTY TRAINING DETAILS

Infrastructure Info

Whether the institute is functioning from own premises/rented one	Owned	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
Attendees	1	Watchman	1

[Cancel](#) [Save](#)

Description	Total Nos.	Approx. Capacity	Description	Total Nos.	Approx. Capacity
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 One more Office Assistant

2.3 How to Add Director/Faculty Training Details

Dashboard **Settings** Activities Accounts Reports Certificates

Download Operating Manual v2.0

Settings
Change Password
Users
Employee

Home > Settings > Create Users

Institute Info

Institute Name:	RSETI - Demo	Bank / Organisation Name:	DEMO
Director:	Srin	Date of Establishment:	01/01/1990
Director Mobile No:		LandLine No:	
State:	Karnataka	District:	BANGALORE (U)
Email Id:			

[Edit](#)

USERS LIST **INFRASTRUCTURE** **FACULTY TRAINING DETAILS**

[Add Faculty Training Details](#)

Training Details

Name	Qualification	Training Attended
Basavaraj (Director)		1. <input type="text"/>
		2. <input type="text"/>
		3. <input type="text"/>

[Edit](#) [Delete](#)

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 [Delete](#) link.

Now you click on add [Faculty training Details](#) as shown below to add Training details of other Faculties in your institute.

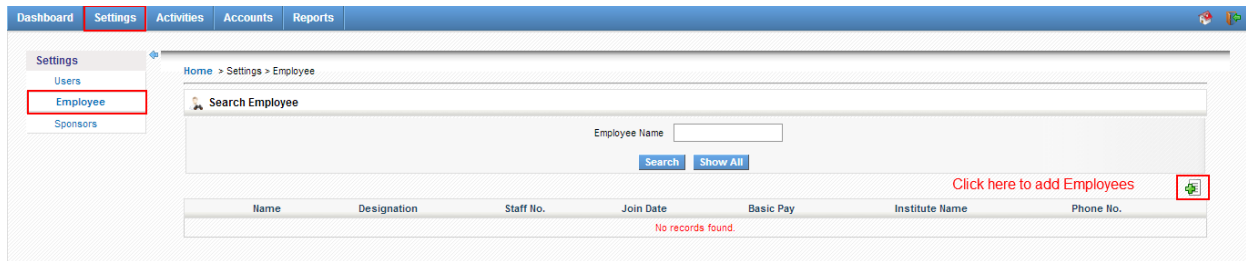
The image displays two screenshots of a web application interface for managing faculty training details.


Top Screenshot: The interface shows a navigation bar with 'USERS LIST', 'INFRASTRUCTURE', and 'FACULTY TRAINING DETAILS'. Below this, there's a 'Training Details' section with a table. The table has columns for 'Name', 'Qualification', and 'Training Attended'. The 'Name' column contains 'Basavaraj (Director)'. The 'Qualification' column has a text input field. The 'Training Attended' column has three rows, each with a number (1, 2, 3) and a text input field. A red box highlights the 'Add Faculty Training Details' button in the top right corner.

Bottom Screenshot: This screenshot shows the same interface but with the 'Add Employee Training Details' section expanded. The 'Name' column has a dropdown menu with options '--Select--', '--Select--', and 'Ranjay Yedav'. The 'Qualification' column has a text input field. The 'Training Attended' column has three rows, each with a number (1, 2, 3) and a text input field. A red box highlights the 'Cancel' and 'Save' buttons in the bottom right corner.

Now click [Save](#) to update the changes.

2.4 How to ADD Employees








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.


*indicates mandatory fields





Edit Employee

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

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

Delete Employee

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


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

Note: Any details once deleted cannot be reverted back.

3. Activities

3.1 How to ADD In house Training Programs



Select **Activities** from the horizontal menu and then click on **Inhouse Programs** from the left menu. From the above screen click on  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.

Add Inhouse Program

Institute Name * RSETI - Demo

Program Category * --Select--

Program Type * --Select--

Program Name *

Description

Sponsor Name * --Select--

Start Date *

Government Sponsored * No

Program Sub Type * --Select--

Batch Number * 3
(Click on the number to edit.)

Total Trainees *

End Date *

Save **Cancel**

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 the name of the program in the **Program Sub Type** then please select the option **OTHERS** from the dropdown and type the **Program Name**.

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.

* indicates mandatory fields

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

Home > Activities > Programs												
Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	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
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

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.

Home > Activities > Candidates

Add Candidate

Institute Name * RSETI - Demo Program Name dairy farming Batch No 2 Roll No 2

Personal Details

Name of the candidate *

Date Of Birth --DD-- --MM-- --YYYY--

Religion --Select--

Education --Select--

Sex * --Select--

Landline: -

Phone No for communication Mob1: Mob2:

Present Occupation of the Candidate Unemployed

Father / Husband Name

Age *

Caste * --Select--

Physically Handicapped --Select--

Poverty Line * --Select--

Occupation of the Family

Photo No file chosen

Contact Details

Nativity Area * --Select--

Address

Village

Taluk / Block

District * --Select--

Hobil / Post

State * --Select--

Pin code

Bank Details

Sponsored candidate by bank No

Other Details

Training interested

Relevant Experience No Experience

If you are student, in which class you are studying

Name of the sponsor if any Bank / NGO / Govt. department

Comments/Remarks

Comments

View Candidate list of a particular training program.

Dashboard

Settings

Activities

Accounts

Reports

Activities

Inhouse Programs

Other Programs

Visitors

Tour Programme

Search Candidates

Home > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	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
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

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.

Home > Inhouse Programs > Candidates

RSETI - Demo - Dairy Farming (1)

Back

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	<div>No Photo Available</div>	Male	23	SC		In Process	
2			candidate	<div>No Photo Available</div>	Male	24	SC		In Process	
3			Demo Candidate	<div>No Photo Available</div>	Male	22	GEN	1234569870	Settled	

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

View Candidate information

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	No Photo Available	Male	23	SC		In Process	

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

Home > Activities > Candidate Profile

[Back](#)

Institute Name

RSETI - Demo

Program Name

Dairy Farming

Batch No

1

Roll No

3

Personal Details

Name of the candidate

candidate

Father / Husband Name

Date Of Birth

23/01/1989

Age

23

Religion

Caste

SC

Sex

Male

Physically Handicapped

No

Landline

Mobile No.

Present Occupation of the Candidate

Unemployed

Occupation of the Family

Contact Details

Locality Area

Rural

Address

Village

Taluk

State

Pin Code

Bank Details

Sponsored candidate by Bank

No

Other Details

Training Interrupted

Relaxant Experience

No Experience

If you are student, in which class you are studying

Name of the sponsor if any Bank / NGO / Govt. department

Comments/Remarks

Comments

Settlement Details

Sl. No.

Project Name

No records found

Remarks

[Save](#)

Edit Candidate information

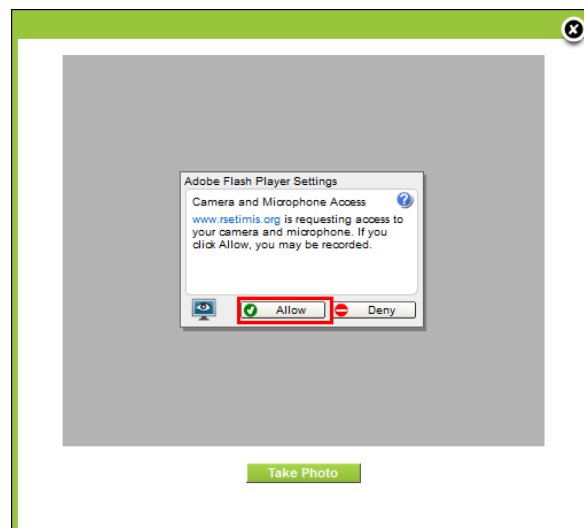
Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	No Photo Available	Male	23	SC		In Process	

By clicking the 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

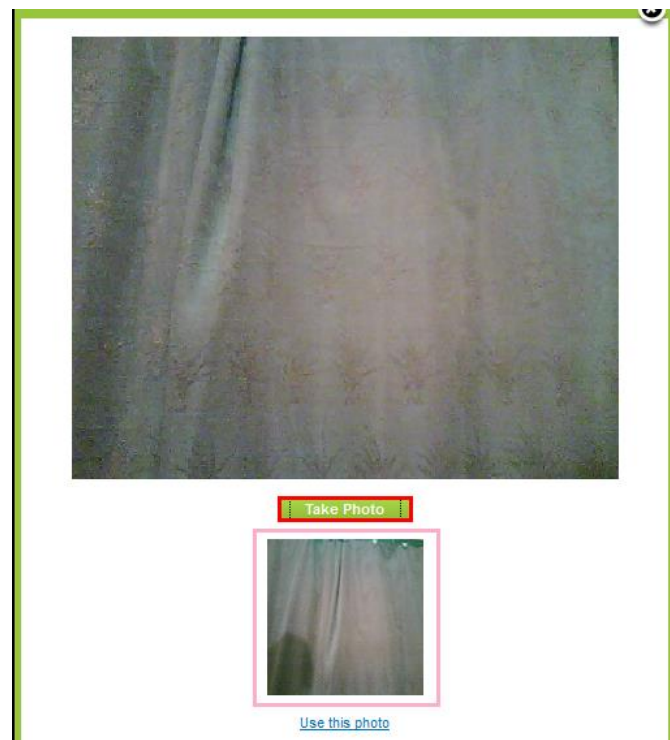
A pop up will appear as shown below,



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.

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.

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.

On this screen, you will need to first enter the rates of the respective items, viz., Breakfast, Tea/Coffee, 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:

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			Morning Tea			Lunch			Afternoon Tea			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.

Add Next Day

Delete Last Day

		Break Fast			Morning Tea			Lunch			Afternoon Tea			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
2																

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 > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	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	
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View	

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

Home > Inhouse Programs > Candidates

RSETI - Demo - Dairy Farming (1)

Back

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	<div>No Photo Available</div>	Male	23	SC		In Process	
2			candidate	<div>No Photo Available</div>	Male	24	SC		In Process	
3			Demo Candidate	<div>No Photo Available</div>	Male	22	GEN	1234569870	Settled	

Now click on [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.

Home > Activities > Candidate Profile Back


Edit Candidate + Add Settlement

Institute Name *	RSETI - Demo	Program Name	Dairy Farming	Batch No	1	Roll No	3
------------------	--------------	--------------	---------------	----------	---	---------	---

Personal Details

No Photo Available

Name of the candidate *	candidate	Father / Husband Name	
Date Of Birth	1 Jan 1989	Age *	23

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.

Home > Activities > Candidates

Add Settlement

Follow Up	Institute Visit	Date of Follow Up	
Batch No	1	Program Name	Dairy Farming
Name of the project started after training			
Place		Employment Status	--Select--
		Date	

Investment For The Project

Self		Bank	
Total			

Bank Details

Bank Loan Provided	No	Branch	
Bank Name	--Select--	Reason	
City			

Others

Earnings/Income (per month)	Whether Employment given to others. If yes, specify the number

Status

Description	
Status	Not Visited

Save
Cancel

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 > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	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
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

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

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Settlement	Delete
8			NAZMA KHATOON	No Photo Available	Female	36	MIN		In Progress	Add Settlement	
1			AFREEN	No Photo Available	Female	27	MIN		In Progress	Add Settlement	
3			MAHIRUN NISHA	No Photo Available	Female	40	MIN		In Progress	Add Settlement	

Now, Click on [Add Settlement](#) 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.

Dashboard

Settings

Activities

Accounts

Reports

Monthly Report

Download Operating Manual v1.0

Activities

Planning

Inhouse Programs

Other Programs

Visitors

Tour Programme

Search Candidates

Training Cost

Bulk Candidates Upload

LAC Meetings

Home > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedback
1		SE	Dairy Farming	352	Agricultural EDPs	Self	23 Feb 2013	28 Feb 2013	- View	34	Add	View	View
2		SE	MULTIPHONES SERVICE TRAINING PROGRAMME	351	Process EDPs	SIDBI	20 Feb 2013	21 Mar 2013	- View	42	Add	View	View
3		SE	ADVANCE MOBILE SERVICING	350	Skill Upgradation Programmes & Growth Programmes	NABARD	14 Feb 2013	23 Feb 2013	- View	31	Add	View	View
4		SE	Beauty Parlour Management	349	Process EDPs	Self	15 Jan 2013	13 Feb 2013	- View	34	Add	View	View
5		SE	Dress Designing for Women	348	Product EDPs	Self	15 Jan 2013	04 Feb 2013	- View	32	Add	View	View
6		SE	DAIRY FARMING	347	Agricultural EDPs	Self	24 Dec 2012	29 Dec 2012	- View	38	Add	View	View
7		WE	COMPUTER DATA ENTRY PROGRAMME	346	Process EDPs	NABARD	17 Dec 2012	15 Jan 2013	- View	29	Add	View	View

You will be directed to the below screen.

Dashboard

Settings

Activities

Accounts

Reports

Monthly Report

Download Operating Manual v1.0

Activities

Planning

Inhouse Programs

Other Programs

Visitors

Tour Programme

Search Candidates

Training Cost

Bulk Candidates Upload

LAC Meetings

Home > Inhouse Programs > Candidates Feedback Details

RUDSETI Agra - Dairy Farming (352)

Back

Sl. No.	Candidate Name	Roll No	Hostel Facility	Food Quality	EDP Training Inputs	Skill Training Inputs	Resource Person	
1	SHRI NIWAS	1	--Select--	--Select--	--Select--	--Select--	--Select--	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

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

SL No.	Candidate Name	Roll No.	Hostel Facility	Food Quality	EDP Training Inputs	Skill Training Inputs	Resource Person	
1	SHRI NIWAS	1	--Select--	--Select--	--Select--	--Select--	--Select--	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	SHEELES 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

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

SL No.	Candidate Name	Roll No.	Hostel Facility	Food Quality	EDP Training Inputs	Skill Training Inputs	Resource Person	
1	SHRI NIWAS	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	SHEELES 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

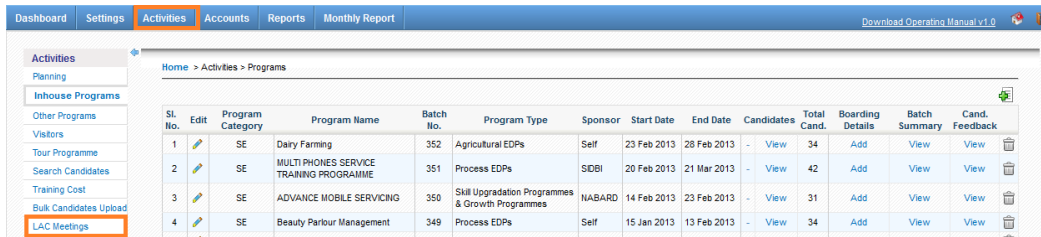
You can also add feedback for all the candidates and then click on **Save All** button as shown below

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--	--Select--	--Select--	--Select--	--Select--	Save

Save All Cancel


3.7 How to add LAC meeting Details:

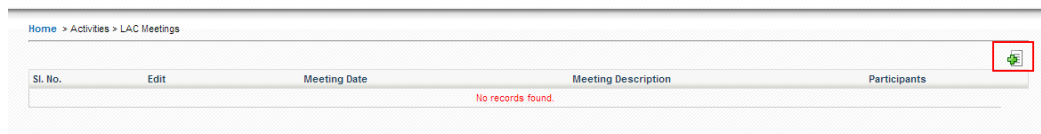
Click on **Activities** on the Horizontal Menu and then click on **LAC meetings** on the left menu as shown below.



The screenshot shows the 'Activities' menu on the left side of the application. The 'LAC Meetings' option is highlighted with a red box. The main content area displays a table of activities.

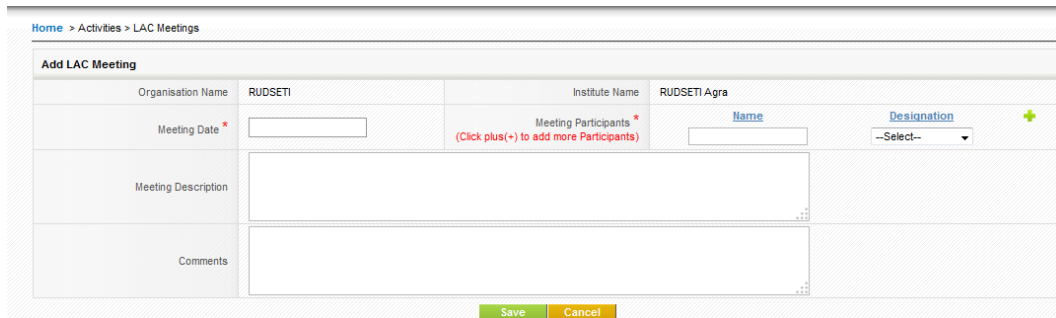
Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedback
1		SE	Dairy Farming	352	Agricultural EDPs	Self	23 Feb 2013	28 Feb 2013	-	View	34	Add	View
2		SE	MULTI PHONES SERVICE TRAINING PROGRAMME	351	Process EDPs	SIDBI	20 Feb 2013	21 Mar 2013	-	View	42	Add	View
3		SE	ADVANCE MOBILE SERVICING	350	Skill Upgradation Programmes & Growth Programmes	NABARD	14 Feb 2013	23 Feb 2013	-	View	31	Add	View
4		SE	Beauty Parlour Management	349	Process EDPs	Self	15 Jan 2013	13 Feb 2013	-	View	34	Add	View

Then to add Meeting click on add  as shown below.




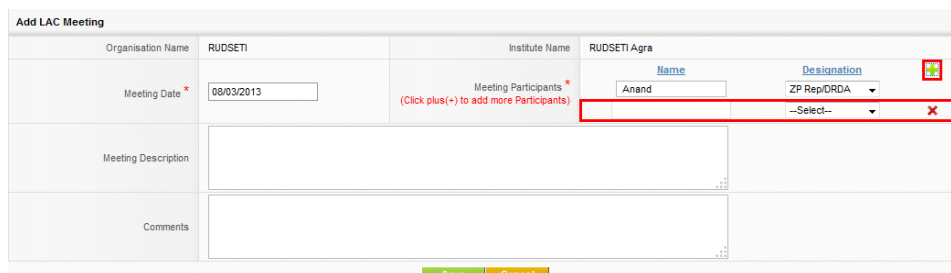
The screenshot shows the 'LAC Meetings' page. The 'add' icon (a green plus sign in a square) is highlighted with a red box in the top right corner. Below it is a table with columns: Sl. No., Edit, Meeting Date, Meeting Description, and Participants. The table is currently empty, showing 'No records found.'

You will be directed to the below screen.




The screenshot shows the 'Add LAC Meeting' form. It includes fields for Organisation Name (RUDSETI), Institute Name (RUDSETI Agra), Meeting Date (08/03/2013), Meeting Description, and Comments. There is a section for Meeting Participants with a table that has columns for Name and Designation. A red box highlights the 'add' icon (a green plus sign in a square) in the top right corner of the participants table.

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  as shown below. Enter the name under the Name filed and select their designation from the dropdown.



The screenshot shows the 'Add LAC Meeting' form with data entered. The Meeting Date is 08/03/2013. The Meeting Participants table has one row with Name 'Anand' and Designation 'ZP Rep/DRDA'. A red box highlights the 'add' icon (a green plus sign in a square) in the top right corner of the participants table.

In case you want to delete a person then click on  as shown in the above picture. And then fill all details click on **save** button as shown below

Home > Activities > LAC Meetings

Add LAC Meeting

Organisation Name	RUDSETI	Institute Name	RUDSETI Agra															
Meeting Date *	08/03/2013	Meeting Participants *	<div>(Click plus(+) to add more Participants)</div> <table border="1"> <thead> <tr> <th>Name</th> <th>Designation</th> <th></th> </tr> </thead> <tbody> <tr> <td>Anand</td> <td>ZP Rep/DRDA</td> <td>+</td> </tr> <tr> <td>velu</td> <td>Circle Head</td> <td>×</td> </tr> <tr> <td>amith</td> <td>Circle Head</td> <td>×</td> </tr> <tr> <td>siva</td> <td>--Select--</td> <td>×</td> </tr> </tbody> </table>	Name	Designation		Anand	ZP Rep/DRDA	+	velu	Circle Head	×	amith	Circle Head	×	siva	--Select--	×
Name	Designation																	
Anand	ZP Rep/DRDA	+																
velu	Circle Head	×																
amith	Circle Head	×																
siva	--Select--	×																
Meeting Description	<div>Meeting Description</div>																	
Comments	<div>Comments</div>																	

[Save](#) [Cancel](#)

The entered details after saving will be displayed as below.

Home > Activities > LAC Meetings

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

If you want edit details click on **edit**

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

Home > Activities > LAC Meetings

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

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.

Dashboard Settings **Activities** Accounts Reports Download Operating Manual v1.0

Activities

- Inhouse Programs
- Other Programs
- Visitors
- Tour Programme
- Search Candidates
- Training Cost
- Upload Excel Cand.**

Home > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	
1		SE	Multi Phones Service Training Programme	19	Process EDP	DRDA	26 Dec 2012	26 Dec 2012	- View	22	Add	View	
2		SE	Dress Designing for Women	18	Product EDP	DRDA	04 Dec 2012	24 Dec 2012	- View	32	Add	View	
3		SE	Beauty Parlour Management	17	Process EDP	Self	30 Oct 2012	30 Nov 2012	- View	18	Add	View	
4		SE	Beauty Parlour Management	16	Process EDP	Self	12 Sep 2012	11 Oct 2012	- View	15	Add	View	
5		SE	Computer Hardware (A++) and Networking (N+)	15	Process EDP	Self	19 May 2012	17 Jun 2012	- View	35	Add	View	
6		SE	Computer Hardware (A++) and Networking (N+)	14	Process EDP	Self	07 Apr 2012	06 May 2012	- View	27	Add	View	

You will be directed to the below screen.

Dashboard Settings Activities Accounts Reports Download Operating Manual v1.0

Upload Candidate Excel

Upload Excel

Batch No. --Select--

Upload File Browse...

Upload Cancel

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

Dashboard Settings Activities Accounts Reports Download Operating Manual v1.0

Upload Candidate Excel

Upload Excel

Batch No. --Select--

Upload File Browse...

Upload Cancel

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.

Dashboard Settings Activities Accounts Reports Download Operating Manual v1.0

Upload Candidate Excel

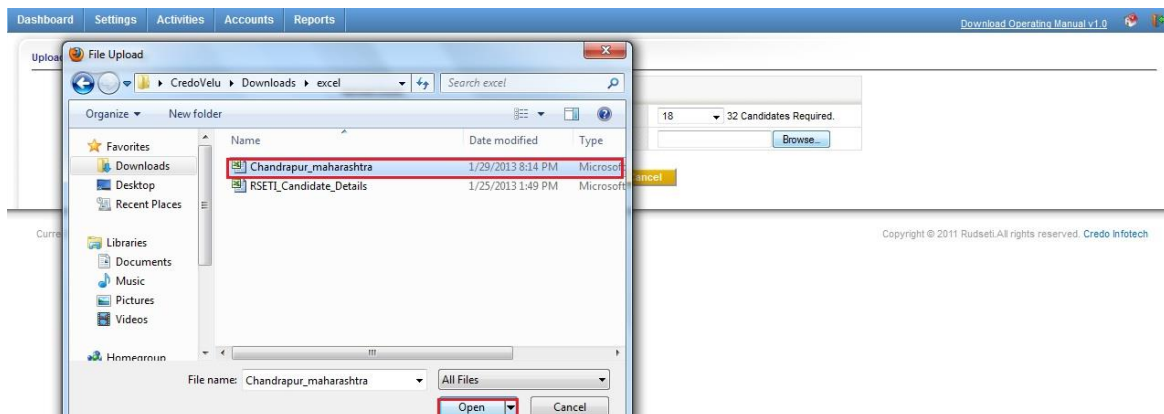
Upload Excel

Batch No. 18 32 Candidates Required

Upload File Browse...

Upload Cancel

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



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

Upload Candidate Excel

Upload Excel

Batch No. 18 32 Candidates Required

Upload File C:\Users\Credo\Velu\Don Browse...

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

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

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.

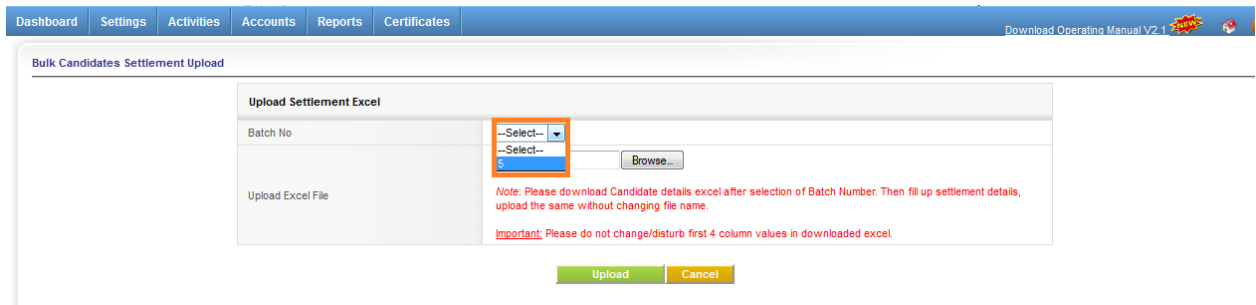
3.9 How to upload candidate Settlement Details from Excel sheet:

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

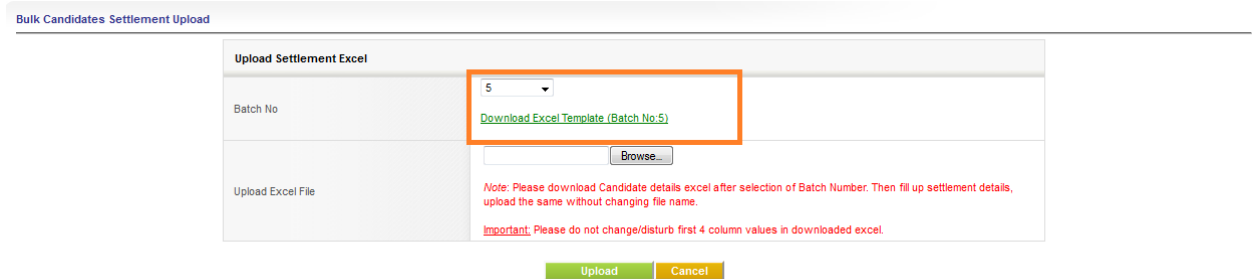
Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedback
1		WE	rubber tapping	5	Agricultural EDPs	Zila Panchayat	04 Feb 2013	28 Feb 2013	Add View	24	Add	View	View
2		SE	gems & Artificial jewellery	4	Product EDPs	District / Zila Panchayat	08 Jan 2013	31 Jan 2013	Add View	25	Add	View	View
3		SE	Food Processing & Bakery Products	3	Product EDPs	SGSY	10 Jul 2012	19 Jul 2012	Add View	22	Add	View	View
4		SE	Dairy Farming	2	Agricultural EDPs	Self	08 Mar 2012	15 Mar 2012	Add View	23	Add	View	View

You will be directed to the below screen.

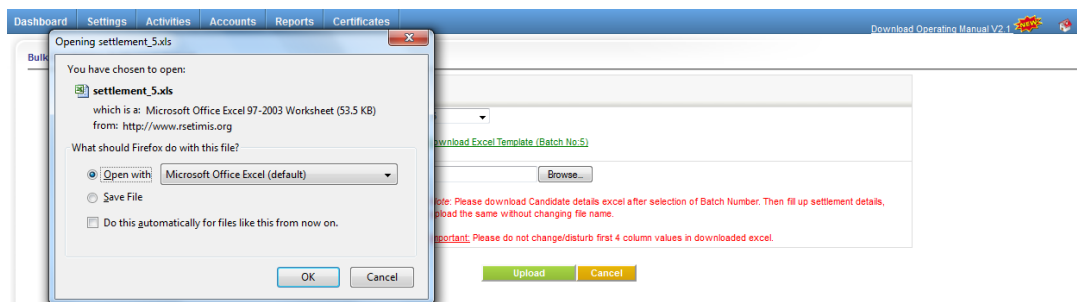
Read instructions marked in Red. Then choose batch no as shown below.



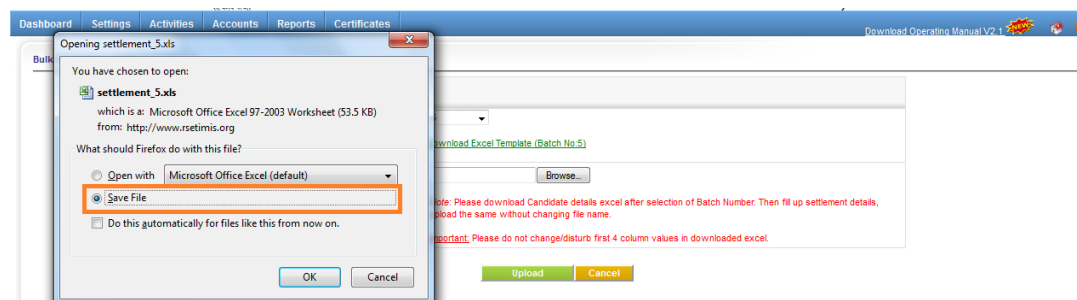
After selection of a batch a link to download an excel sheet will appear as shown below.
[Download Excel Template \(Batch No:5\)](#)



Now click on [Download Excel Template \(Batch No:5\)](#) link. You will be directed to the below screen.



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



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.

Batch No	Candidate Id	Candidate Name	Roll No	Follow_Up Type	Date of Follow Up	Name of the project started after training	Employment
5	195428	Vadivel Prospective	1				
5	74797	candidate	2				
5	109171	vadivel	3				
5	117466	Srinivas Shenoy	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.

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.

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

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...

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.

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 Manual v1.0

Activities
Planning
Inhouse Programs
Other Programs
Visitors
Tour Programme
Search Candidates
Training Cost
Upload Excel Cand.
LAC Meeting
Prospective Candidates

Home > Activities > Prospective Candidates

Sl. No.	Edit	Name	Father Name	Age	Caste	Nativity Area	Marital Status
1		selvaraj	arumugam	21	OBC	Rural	Married
2		FASDFS	K	21	SC	Urban	UnMarried
3		moorthi	K	22	ST	Urban	UnMarried
4		suruli	K	21	ST	Rural	Married
5		karthik	K	20	OBC	Rural	Married

Select **Activities** from the horizontal menu and then click on **Prospective Candidates** from the left menu. From the above screen click on  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.

Add Candidate

Institute Name RUDSETI Agra

Name of the candidate *
Date Of Birth --DD-- --MM-- --YYYY--
Religion --Select--
Education --Select--
Sex * --Select--
Marital Status * --Select--
Landline
Phone No for communication
Present Occupation of the Candidate

Father / Husband Name *
Age
Caste * --Select--
Person with Disability --Select--
Poverty Line --Select--
SGSY to SGSY/Govt. Sponsored
Occupation of the Family --Select--
Email ID

Upload Photo from Local Computer
(Please do not upload photos with more than 150KB size.)

No Photo Available

(OR) Take Photo from WebCam

Nativity Area * --Select--
Address

Comments/Remarks











Save


Save & Add More

Cancel

Edit prospective Candidate information

Home > Activities > Prospective Candidates

Sl. No.	Edit	Name	Father Name	Age	Caste	Nativity Area	Marital Status	
1		selvaraj	arumugam	21	OBC	Rural	Married	
2		FASDFS	K	21	SC	Urban	UnMarried	
3		moorthi	K	22	ST	Urban	UnMarried	
4		suruli	K	21	ST	Rural	Married	
5		karthik	K	20	OBC	Rural	Married	

By clicking the  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:


Dashboard Settings **Activities** Accounts Reports Certificates Download Operating Manual V2.1

Activities

Training/Inhouse Programs

Home > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedback
1		WE	rubber tapping	5	Agricultural EDPs	Zilla Panchayat	04 Feb 2013	28 Feb 2013	  View	24	Add	View	View
2		SE	gems & Artificial Jewellery	4	Product EDPs	District / Zilla Panchayat	08 Jan 2013	31 Jan 2013	  View	25	Add	View	View
3		SE	Food Processing & Bakery Products	3	Product EDPs	SGSY	10 Jul 2012	19 Jul 2012	  View	22	Add	View	View
4		SE	Dairy Farming	2	Agricultural EDPs	Self	08 Mar 2012	15 Mar 2012	  View	23	Add	View	View

Select **Activities** from the horizontal menu and then click on **Training/Inhouse Programs** from the left menu. From the above screen, click on  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.

Dashboard Settings Activities Accounts Reports Certificates Download Operating Manual V2.1

Activities

Training/Inhouse Programs

Home > Inhouse Programs > Prospective Candidates

Search Prospective Candidates

Search By: Name --Training Interested Type--

Search Show All

Select / Add Prospective Candidates for rubber tapping (5)

Sl No	Name	Age	Sex	Caste	Poverty Line	Training Interested Type	Training Interested SubType	Nativity Area	District	State	Select
1	selvaraj	21	Female	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	<input type="checkbox"/>

Add Cancel

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

Dashboard Settings Activities Accounts Reports Certificates Download Operating Manual V2.1

Activities

Training/Inhouse Programs

Home > Inhouse Programs > Prospective Candidates

Search Prospective Candidates

Search By: Name --Training Interested Type--

Search Show All

Select / Add Prospective Candidates for rubber tapping (5)

Sl No	Name	Age	Sex	Caste	Poverty Line	Training Interested Type	Training Interested SubType	Nativity Area	District	State	Select
1	selvaraj	21	Female	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	<input type="checkbox"/>

Add Cancel

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

Dashboard Settings Activities Accounts Reports Certificates Download Operating Manual V2.1

Activities

- Training/Inhouse Programs
- Other Programs
- Visitors
- Tour Programme
- Search Candidates
- Bulk Candidates Upload
- Upload Settlement Excel
- LAC Meetings
- Prospective Candidates

Home > Inhouse Programs > Prospective Candidates

Search Prospective Candidates

Search By Name --Training Interested Type--

Search Show All

Select / Add Prospective Candidates for rubber tapping (5)

Sl No	Name	Age	Sex	Caste	Poverty Line	Training Interested Type	Training Interested SubType	Nativity Area	District	State	Select
1	selvaraj	21	Female	SC	APL		Bee Keeping	Rural	BANGALORE (U)	Karnataka	<input type="checkbox"/>

Add Cancel

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

Dashboard Settings Activities Accounts Reports Certificates Download Operating Manual V2.1

Activities

- Training/Inhouse Programs
- Other Programs
- Visitors
- Tour Programme
- Search Candidates
- Bulk Candidates Upload
- Upload Settlement Excel
- LAC Meetings
- Prospective Candidates

Home > Inhouse Programs > Prospective Candidates

Search Prospective Candidates

Search By Name --Training Interested Type--

Search Show All

Select / Add Prospective Candidates for rubber tapping (5)

Sl No	Name	Age	Sex	Caste	Poverty Line	Training Interested Type	Training Interested SubType	Nativity Area	District	State	Select
1	selvaraj	21	Female	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	<input checked="" type="checkbox"/>

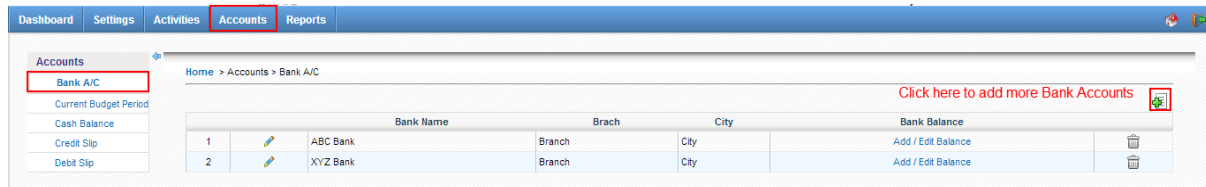
Add Cancel

The selected candidates will be moved to the program.


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



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.


The screenshot shows the 'Add Bank Account' form. It has fields for 'Bank Name', 'Address', 'Branch', 'City', 'State', and 'Pin Code'. The 'Bank Name' and 'Branch' fields are marked with a red asterisk, indicating they are mandatory. There are 'Save' and 'Cancel' buttons at the bottom.

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.

The screenshot shows the 'Bank Account' list page. It has a breadcrumb 'Home > Accounts > Bank A/C'. A table lists bank accounts with columns: 'Bank Name', 'Branch', 'City', and 'Bank Balance'. The table contains three rows: 'ABC Bank', 'XYZ Bank', and 'RST Bank'. A red box highlights the 'Add / Edit Balance' link in the 'Bank Balance' column for the first row.

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


The screenshot shows the 'Add Bank Amount' form. It has fields for 'Institute', 'Year', 'Bank', and 'Amount'. The 'Institute' field is pre-filled with 'RSETI - Demo'. The 'Bank' field is pre-filled with 'ABC Bank'. The 'Year' field is a dropdown menu with '--Select--' selected. The 'Amount' field is marked with a red asterisk, indicating it is mandatory. There are 'Save' and 'Cancel' buttons at the bottom.

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.


The screenshot shows the 'Accounts' menu on the left with 'Current Budget Period' highlighted. The main area is titled 'Home > Accounts > Current Budget Period'. It contains a 'View Budget Period' section with two input fields: 'Current budget year starts from' and 'Current budget year ends on'. An edit icon (pencil) is visible in the top right corner of the 'View Budget Period' section.

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.


The screenshot shows the 'Accounts' menu on the left with 'Cash Balance' highlighted. The main area is titled 'Home > Accounts > Cash Balance'. It contains a 'View Cash Balance' section with an input field for 'Opening Cash Balance'. An edit icon (pencil) is visible in the top right corner of the 'View Cash Balance' section.

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.

The screenshot shows the 'Accounts' menu on the left with 'Credit Slip' highlighted. The main area is titled 'Home > Accounts > Credit Slip'. It contains a 'Search Credit Slips' section with input fields for 'Credit Slips From' and 'To', and buttons for 'Search' and 'Show All'. Below this is a table with columns: 'Date', 'Slip No', 'Amount Credited', and 'Mode of Credit'. The table currently shows 'No records found.' An add icon (plus) is visible in the top right corner of the table area.

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.

The screenshot shows the 'Credit Slip' form for adding a new entry. It has a title 'Home > Accounts > Credit Slip' and a section 'Credit Amount'. The form includes fields for 'Date', 'Mode of Payment', 'Amount', 'Remarks / Towards', 'Slip No' (with a value of 1), and 'Suspense Credit' (with a checkbox for 'Yes / No'). There are 'Save' and 'Cancel' buttons at the bottom.


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.

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.

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.

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.

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