

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.

• 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												
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	
2	1	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 <u>http://www.rsetimis.org/</u> in the address bar to access the MIS.

The resultant screen will be as below.

सत्यमेव जयते	Ministry of Rural Development Government of India	Acjeevika National Rural Livelihoods Mission (NRLM)	Monitoring Cell for RSETIs National Academy of Rudseti
Login			
	Login Id Password	Login Forgot Password?	
	Secone	took* READER*	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

45	Add New Record
Ô	Delete Record
<i>,</i>	Edit Record
ିଙ୍କ	View Record
19	Home Button
	Sign out / Logout Button

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2. Settings

2.1 How to ADD USERS

Settings Change Password	Hom	ie > S	ettings > Cr	reate Users										
Users	In	stitute	Info											Ed
Employee	Institute Name: RUDSETI Agra					Bank / Or	Bank / Organisation Name: RUDSETI							
				Di	rector:	R.K. Kapoor			Date	of Establishment	01/01/1997			
				Director Mol	bile No	9412171234				LandLine No	0562-296511	0		
					State	Uttar Pradesh		~		District	AGRA		-	
	Email Id rudsetagra@yahoo.co.in													
	USERS LIST INFRASTRUCTURE				RE	FACULTY TRAINING DETAILS								
				User Name		User Type	Institu	te Name	Designation	Creat	ted On	Last Updat	ed On	
	1	P	Agra adr	nin	Inst	itute Admin	RUDSETI Agra		Faculty	20/04	4/2012	20/04/20	12	រ
	2	1	B.M. Pan	dey	Inst	itute User	RUDSETI Agra		Senior Faculty	06/02	2/2013	06/02/20	13	1
	3	1	Gurudev	Pachauri	Inst	itute User	RUDSETI Agra		Faculty	06/02	2/2013	06/02/20	13	1

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.

dd 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	Ô
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

Delete User

You will be able to **Delete** the user by clicking on the \widehat{m} 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	P	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	â

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				RUDSETI		
Employee	Institute Name:	RUDSETI Agra		Bank / Organisation Name:			
	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 D	ETAILS			Ed	
	Whether the in:	stitute is functioning from	Owned 👻	If functioning from a rented prem has been allotted by the		No 👻	
	Whether the Director has undergone Induction Train at National Academy of RUDSET		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.

Infrastructure Info					Cancel Sa
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	
	1				
Class Rooms	2	80	Work shed Staff / Office Room	1	40
Director's Room					
Director's Room Kitchen	1	60	Dining Hall	1	50
			Dining Hall Dormitory for Ladies	1	50 35
Kitchen	1	60	-		
Kitchen Dormitory for Gents	1	60 35	Dormitory for Ladies	1	35
Kitchen Dormilory for Gents Guest Room	1 1 2	60 35 2	Dormitory for Ladies Computers	1	35 48

2.3 How to Add Director/Faculty Training Details

Dashboard	Settings	Activities	Accounts	Reports Certific	ates			Download Operating Manual v2.0
Settings Change Pa	ssword	Home	> Settings > Cre	ate Users				
Users		Instit	ute Info	Edit				
Employee				Institute Nar	ne: RSETI - Demo		Bank / Organisation Name:	DEMO
				Direct	or: Srini		Date of Establishment	01/01/1900
				Director Mobile	No		LandLine No	
				St	ate Karnataka	T	District	BANGALORE (U)
				Ema	Ild			
		US	ERS LIST	INFRASTRUCTURE	FACULTY TRAINING D	ETAILS		
								Add Faculty Training Details
		Train	ing Details					Edit Delete
			N	ame	Qualification	n	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.

		IG DETAIL S	FACULTY TRAININ	INFRASTRUCTURE	SERS LIST
Add Faculty Training D					
Edit					ning Details
Training Attended		ation	Qualific	Name	N
	1.			aj (Director)	Basavara
	2.				
	3.				
Add Faculty Training Deta		IING DETAILS	FACULTY TRAIN	INFRASTRUCTURE	USERS LIST
Add Faculty Training Detai		IING DETAIL S	FACULTY TRAIN		
			FACULTY TRAIN		raining Details
<u>Edit</u> Deli	1			8	raining Details
<u>Edit</u> Deli	12			s Name	raining Details
<u>Edit</u> Deli				s Name	raining Details
<u>Edit</u> Deli	2			s Name	raining Details
<u>Edit</u> Deli	2			Name Naraj (Director)	raining Details
Edt Del Training Attended	2	ation		Name Naraj (Director)	Taining Details Basavi Add Employee T
Edt Del Training Attended	2	ation	Qualific	Name varaj (Director) Trining Details Name elect- V	raining Details Basavi Add Employee T Se
Edt Del Training Attended	2	ation	Qualific	Name varaj (Director) Trining Details Name	Training Details Basavi Add Employee T Set

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

2.4 How to ADD Employees

Dashboard	Settings	Activit	ies Accounts	Reports							19
Settings Users		¢0	lome > Settings > En	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	s 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.

imployee Info			
Institute Name *	RSETI - Demo	Join Date *	
Name *		Designation *	Select
Staff No. *			
Address			
Address Phone No.		Email	
		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	Ê
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 R	SETI - Demo		View	ŵ
2	1	Pankaj Yadav	Faculty	0122	01/12/2010	20,000.00 R	SETI - Demo		View	Ê

Note: Any details once deleted cannot be reverted back.

3.1 How to ADD In house Training Programs

tivities 🔶			es > Programs												
Inhouse Programs	Home	Activiti	ss > Programs									01			
Other Programs												UI	ck here to add m	lore Programs	45
Visitors	SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Cand	lidates	Total Cand.	Boarding Details	Batch Summary	
Tour Programme			SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	20 Nev 2012	05 Dec 2012		1.5	10	Add	View	Û

Select **Activities** from the horizontal menu and then click on **Inhouse Programs** from the left menu. From the above screen click on $\overline{\mathbf{E}}$ 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.

d Inhouse Program			
Institute Name *	RSETI - Demo		
Program Category *	Select	Government Sponsered *	No 💌
Program Type *	Select	Program Sub Type *	Select 💌
Program Name *		Batch Number*	3 (Click on the number to edit.)
Description			
Sponsor Name	Select	Total Trainees *	
Start Date *		End Date *	

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.

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	
	30	31						

* indicates mandatory fields

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

Home >	Activitie	es > Programs												
														45
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	Û
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	Ê

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.

dd Candidate								
Institute Name * RSETI - Demo	Program Ni	ame dairy	farming	Batch No 2		Roll No	2	
Personal Details								
				Father / Husban				
Name of the candidate * Date Of Birth				Father / Husban				
		YYY- 🔻			Age *	Select		
Religion	Select				Caste *			
				Physically Handi				
Sex *	Select			Poverty	Line	Select 💌		
	Landline:							
Phone No for communication	Mob1:			Occupation of the	Family			
	Mob2:							
Present Occupation of the Candidate	Unemployed				Photo	Choose File No file	chosen	
Present Occupation of the californiate	Unemployed				Photo	Choose the No the	citosen	
Contact Details								
Nativity Area *	Select							
Nativity Area								
Address								
Address								
Vilage				Hobli / Post				
Vilage Taluk / Block				Hobli / Post	Sele	ct		
Taluk / Block	Salart			State *	Sele	ct	-	
	Select 💌				Sele	ct	•	
Taluk / Block	Select 💌			State *	Selet	ct	•	
Taluk / Block District *				State *	Selet	ct [
Taluk / Block District [≪] Bank Details	Select v			State *	Seler	ct		
Taluk / Block District [≪] Bank Details				State *	Seler	ct		
Tatuk / Block District * Bank Details Sponsered candidate by bank				State *		ct	•	
Taluk / Biock District * Bank Details Sponsered candidate by bank Other Details			Name of the sponser if a	State [#] Pin code				
Taluk / Biock District * Bank Details Sponsered candidate by bank Other Details Training interested			Name of the sponser if a	State * Pin code Relevant Experience				
Taluk / Biock District * Bank Details Sponsered candidate by bank Other Details Training interested			Name of the sponser if a	State * Pin code Relevant Experience				
Taluk / Block District * Bank Details Sponsered candidate by bank Other Details Training interested If you are student, in which class you are studying			Name of the sponser if a	State * Pin code Relevant Experience				
Taluk / Block District * Bank Details Sponsered candidate by bank Other Details Training interested If you are student, in which class you are studying			Name of the sponser if a	State * Pin code Relevant Experience				

View Candidate list of a particular training program.

tivities	•															
Inhouse Programs		Home >	Activitie	es > Programs												
Other Programs																45
Visitors		SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candi	dates	Total Cand.	Boarding Details	Batch Summary	
Tour Programme					1	1		1-							1	
Search Candidates		1	1	SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add	View	10	Add	View	Ô
Search Candidates		2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	ŵ

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	mo - Dairy Fa	rming (1)								E
SI. No.	▲ View	Edit		Photo	\$ Sex	\$ Age	≎ Caste	Contact No.	Settlement Status	Delete
1	66	1	candidate	No Photo Available	Male	23	sc		In Process	â
2	65	1	candidate	No Photo Available	Male	24	sc		In Process	â
3	64	,	Demo Candidate	No Photo	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 *for* 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 / Husbard Name	
Date Of Sittle	01/01/1989	Age	23
Religion		Caste	sc
Education		Physically Handicapped	No
Sex	Maie	Poverty Line	APL
Phone No for communication	Landine - Most: Mos2	Occupation of the Parnly	
Present Docupation of the Candidate	Unemployed		
ontact Details			
Nativity Area	Rural		
Address Hobi		Vilage	
Fibble Tak/s			Arunachal Pradesh
7804 Zio		State	
20		Used	com
ank Details			
Sponsered candidate by Bank	Ne		
Other Details			
Training interested		Relevant Experience	No Experience
If you are student, in which class you are studying		Name of the sponser if any Bank / NGO / GovL department	
Commenta/Remarka			
Comments			
lettlement Details			
5.No	Project Name	Remai	

Edit Candidate information

\$ SI. No.	▲ View	Edit		Photo	\$ Sex	¢ Age	¢ Caste	Contact No.	Settlement Status	Delete
1	6 . .	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 🐡	Home > Activities > Candidates						
lanning	Home > Activities > Candidates						
house Programs	Add Candidate						
ther Programs			Dress Design	ing for			
sitors	Institute Name RUDSETI Veta	apalem Program	Women	Batch No	435	Roll No *	16
ur Programme							
arch Candidates	Personal Details						
ining Cost	Name of the candidate *			Father / Husband Nan	ne		
Candidates Upload	Date Of Birth	DD	YY •	Age	*		
C Meetings	Religion	Select V		Caste		-	
	Education	Select		Person with Disabili		•	
	Sex *	Select V		Poverty Line			
		Landline:		SGSY to SGSY/Govt. Sponsore	ed No 👻		
	Phone No for communication	Mob1: (10 digit n	umber only)				
		Mob2: (10 diait n	umber only)	Occupation of the Fam	ilySelect		
	Present Occupation of the Candidate	Unemployed	•	Email	D		7
							_
			(Please do not up)	Upload Photo from Local Comput load photos with more than 150KB size		Browse	_
					No	(OR)	
					Photo	Take Phot	
					Available	WebCam	o trom

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 Programs	Add Candidate						
Visitors	Institute Name RUDSETI	Agra Prog	ram Name	Dairy Farming	Batch No 3	152	Roll No * 17
our Programme				,			
raining Cost	Personal Details						
AC Meeting	Personal Details						
	Name of the candidate *]		Father / Husband Name		
	Date Of Birth	DD	YY 🔻		Age *		
	Religion	Select 👻			Caste	Select	•
	Education	Select 👻			Person with Disability	Select 👻	
	Sex *	Select 💌			Poverty Line	Select 👻	
		Landline: -			SGSY Candidate	No 👻	
	Phone No for communication	Mob1:					
		Mob2:			Occupation of the Family	Select	
							Take Photo

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.

														4
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	É
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	f

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.

	Boarding															
	Training Program	dairy far	rming				Batch N	lo. 2				No.	of Candidates	10		
	No. of Days	6														
ates																(D=-)
Brea	k Fast (Rs.)*		Morning	Tea (Rs.)*		Lun	ch (Rs.)*	1	Afternoor	Tea (Rs.)		Dinner (F	(s.)	Adv	vances, if a	ny (RS.)
Brea	k Fast (Rs.)*		Morning	Tea (Rs.)*		Lur	ch (Rs.)*		Afternoor	i Tea (Rs.)*		Dinner (F	{s.)"	Adv	vances, if a]
Brea	k Fast (Rs.)*									1 Tea (Rs.) [*]				Adv	ay Delet]
Brea	k Fast (Rs.)*		Morning Break Fast		1	Lur			Lunch	1 Tea (Rs.)*	A	Dinner (F				te Last D
Brea	k Fast (Rs.)*	Tr			Tr					Total	A				ay Delet]

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		1	Morning Te	a		Lunch		A	fternoon Te	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		1	Morning Te	a		Lunch		A	fternoon T	ea		Dinner	
ay	Date	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Tota
	05/12/2012	15	2	17	15	2	17	15	15	30	15	2	17	15	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 >	 Activitie 	es > Programs												
														4
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	Ô

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

RSETI - De	emo - Dairy Fa	rming (1)								<u>B</u>
\$ SI. No.	▲ View	Edit	Candidate Name	Photo	\$ Sex	\$ Age	¢ Caste	Contact No.		Delete
1	64	1	candidate	No Photo Available	Male	23	sc		In Process	Ť
2	63	1	candidate	No Photo Available	Male	24	sc		In Process	Ĩ
3	65		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.

© 2012 Credo Infotech. All rights reserved

Edit Candidate Institute Name* RSETI - Demo Program Name Dairy Farming Batch No 1 Roll No 3 Personal Details						I
Personal Details	Edit Candidate					Add Settleme
No Photo	Institute Name * RSETI - Demo	Program Name	e Dairy Farming	Batch No 1	Roll No	3
Photo	Personal Details					
					Pł	noto
	Name of the candidate *	candidate		Father / Husband Name		
Name of the candidate Candidate Father / 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 Employmen	It given to others. If yes, specify the numbe	ir 🗌	
Status					
Description					
D d d r p turi					
Status	Not Visited 💌				

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.

														F
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	Í
2	1	SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add	View	25	Add	View	f

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	ଜେ	1	NAZMA KHATOON	No Photo Available	Female	36	MIN		In Progress	Add Settlement	ŵ
1	ଜେ	1	AFREEN	No Photo Available	Female	27	MIN		In Progress	Add Settlement	Î
3	କେ	/	MAHIRUN NISHA	No Photo Available	Female	40	MIN		In Progress	Add Settlement	â

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.

Activities															-
Planning	Ноп	ne > Ai	ctivities > Prog	rams											
Inhouse Programs															4
Other Programs	SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidate	Total Cand.	Boarding Details	Batch Summary	Cand. Feedbac	,
Visitors	1	1	SE	Dairy Farming	352	Agricultural EDPs	Self	23 Feb 2013	28 Feb 2013	- View	34	Add	View	View	Ê
Tour Programme 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	Ê
Training Cost	3		SE	ADVANCE MOBILE SERVICING	350	Skill Upgradation Programmes	NARADO	14 Feb 2013	00 E+h 0040	- View	31	Add	View	View	Ê
Bulk Candidates Upload	3	1	ac	ADVANCE MODILE SERVICING	330	& Growth Programmes	NADARD	14 160 2013	23 FED 2013	- View	31	Add	VIEW	VIEW	-
LAC Meetings	4	1	SE	Beauty Parlour Management	349	Process EDPs	Self	15 Jan 2013	13 Feb 2013	- View	34	Add	View	View	Ê
	5	1	SE	Dress Designing for Women	348	Product EDPs	Self	15 Jan 2013	04 Feb 2013	- View	32	Add	View	View	Ê
	6	1	SE	DAIRY FARMING	347	Agricultural EDPs	Self	24 Dec 2012	29 Dec 2012	- View	38	Add	View	View	6
	7		WE	COMPUTER 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.

	Activities A	ccounts Reports	Monthly Report					Download Operating Manua	<u>al v1.0</u> 1
Activities	Home > Inh	iouse Programs > Candida	tee Feedback Detaile						
Planning		iouae rrograma > candide	ites recourse betails						
Inhouse Programs	BUDGE		(353)						
Other Programs	RUDSE	TI Agra - Dairy Farming	(352)						Ba
Visitors									
Tour Programme	▲ \$1. No.	Candidate Name			Food Quality				
Search Candidates									
Training Cost	1	SHRINWAS	1	Select +	Select +	Select +	Select +	Select +	Save
Bulk Candidates Upload	2	MUNESH KUMAR	2	Select	Select 👻	Select	Select	Select	Save
LAC Meetings	3	RAJESH KUMAR	3	Select	Select	Select 🔻	Select +	Select	Save
	4	RAKESH BABU	4	Select	Select	Select 👻	Select +	Select v	Save

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

▲ SI. No.	Candidate Name	\$ Roll No	♦ Hostel Facility		EDP Training Inputs	\$ \$kill Training Inputs	Resource Person	
1	SHRINIWAS	1	Select	Select 🔻	Select 👻	Select 👻	Select 🔻	Save
2	MUNESH KUMAR	2	Select Excellent	Select 🔻	Select 👻	Select 👻	Select 🔻	Save
3	RAJESH KUMAR	3	Good Satisfactory Poor	Select v	Select 👻	Select 🔻	Select 👻	Save
4	RAKESH BABU	4	Excellent Very Poor	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		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 v	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 +	Select v	Select 👻	Select 👻	Select 👻	Save
				Save All Ca	ncel			
				· <u>·····</u>				
				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.

ashboard Settings A	ctivitie	3 A	ccounts	Reports Monthly Report								<u>Down</u>	load Operating	Manual v1.0	0 1
Activities Planning	Hom	e > Ac	tivities > Progr	ams											
Inhouse Programs															Æ
Other Programs	SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candi	dates Tota		Batch Summary	Cand. Feedbacl	k
Visitors	1		SE	Dairy Farming	352	Agricultural EDPs	Self	23 Feb 2013	28 Feb 2013	2.1	/iew 34	Add	View	View	Ê
Tour Programme				MULTI PHONES SERVICE											
Search Candidates	2	1	SE	TRAINING PROGRAMME	351	Process EDPs	SIDBI	20 Feb 2013	21 Mar 2013	- \	/iew 42	Add	View	View	Ê
Training Cost	3		SE	ADVANCE MOBILE SERVICING	350	Skill Upgradation Programmes	NABARD	14 Eab 2012	23 Feb 2013		/iew 31	Add	View	View	Ê
Bulk Candidates Upload			JL	ADVANCE MODILE SERVICING	330	& Growth Programmes	INADARD	141602013	201002013		16W 31	Add	VIEW	VICTV	
LAC Meetings	4	1	SE	Beauty Parlour Management	349	Process EDPs	Self	15 Jan 2013	13 Feb 2013	- \	/iew 34	Add	View	View	龠

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

il. 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				
Comments				

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.

Organisation Name	RUDSETI	Institute Name	RUDSETI Agra		
			Name	Designation	
Meeting Date *	08/03/2013	Meeting Participants * (Click plus(+) to add more Participants)	Anand	ZP Rep/DRDA 🛛 👻	
		(Click plus(+) to add more Participants)		Select 🗸	×

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

ld LAC 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.

Edit Meeting Date Meeting	Description Participants	
1 08/03/2013 Meeting Description	Anand - ZP Rep/DRDA velu - Circle Head antith - Circle Head siva -	â

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

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

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.

ctivities	pi													_
Inhouse Programs	Home	> Activi	ties > Programs											
Other Programs														45
Visitors	SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary	
Tour Programme	1	1	SE	Multi Phones Service Training Programme	19	Process EDP	DRDA	26 Dec 2012	28 Dec 2012	- View	22	Add	View	龠
Search Candidates	2	1	SE	Dress Designing for Women	18	Product EDP	DRDA	04 Dec 2012	24 Dec 2012	- View	32	Add	View	â
Training Cost	3	1	SE	Beauty Parlour Management	17	Process EDP	Self	30 Oct 2012	30 Nov 2012	- View	18	Add	View	Ê
Upload Excel Cand.	4	1	SE	Beauty Parlour Management	16	Process EDP	Self	12 Sep 2012	11 Oct 2012	- View	15	Add	View	Ê
	5	1	SE	Computer Hardware (A+) and Networking (N+)	15	Process EDP	Self	19 May 2012	17 Jun 2012	- View	35	Add	View	â
	6		SE	Computer Hardware (A+) and Networking (N+)	14	Process EDP	Self	07 Apr 2012	06 May 2012	- View	27	Add	View	ŵ

You will be directed to the below screen.

d Candidate Excel			
	Upload Excel		
	Batch No	Select 👻	
	Upload File	Browse	

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

			Download Operating Manual v1.0
load Candidate Excel			
	Upload Excel		
	Batch No	Select	
	Upload File	Select 18 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.

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 Uploa Settings File Upload		Download Operating Manual v1.0 🤌 🧚
· · · · · · · · · · · · · · · · · · ·	Search excel	
Organize 🔻 New folder	III 🔹 🚺 🔞 🔰 18 🗸 32	Candidates Required.
🔶 Favorites	Date modified Type	Browse_
Downloads Chandrapur_maharashtra	1/29/2013 8:14 PM Microsof	
Desktop Brecent Places	1/25/2013 1:49 PM Microsoft	
Curre Curres		Copyright © 2011 Rudseti.All rights reserved. Credo Infotech
a& Homearoun ▼ ✓	All Files	

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	0 B
Upload Ca	ndidate Excel	1								
				Uploa	Excel					
				Batch I	0		18	➡ 32 Candidates Required.		
				Upload	ile		C:\Users\	CredoVelu\Dov Browse_		
						load Canc				
					terra contra		(All states)			
					Upload		Can	cel		

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

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Dashboard	Settings	Activities	Accounts	Reports						Download Operating Manual v1.0	19 IP
Upload Ca	ndidate Excel										
					Upload Excel						
				1	Batch No			-Select 👻			
				1	Upload File				Browse_		
						Age row Poverty_line r Poverty_line r	Data Error: e row 10 is blank, please 7 is blank, please corre ow 13 is blank, please c ow 19 is blank, please c ow 19 is blank, please c Cancel	orrect.			

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	1	Þ
Upload Ca	ndidate Excel	li.									_
					Upload Excel						
				В	atch No		Select 👻				
				U	pload File			Browse_			
						32Records Uploaded Success Upload Cano					

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

Activities		*	Home	> Acti	vities > Program	19											
Training/Ir	nhouse Progra	ams			rices - rregian	~											-
Other Progr Visitors			SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidate	s Total Cand	Boarding Details	Batch Summary	Cand. Feedback	49 ,
Tour Progra Search Can			1		WE	rubber tapping	5	Agricultural EDPs	Zilla Panchayat	04 Feb 2013	28 Feb 2013	Add I 😰 Vi	ew 24	Add	View	View	Ē
	lates Upload lement Excel		2	1	SE	gems & Artificial jewellary	4	Product EDPs	District / Zilla Panchayat	08 Jan 2013	31 Jan 2013	Add 😰 Vi	ew 25	Add	View	View	ĩ
LAC Meetin			3	1	SE	Food Processing & Bakery Products	3	Product EDPs	SGSY	10 Jul 2012	19 Jul 2012	Add I 🗊 Vi	ew 22	Add	View	View	ĩ
Prospective	Candidates		4	1	SE	Dairy Farming	2	Agricultural EDPs	Self	08 Mar 2012	15 Mar 2012		ew 23	Add	View	View	1

You will be directed to the below screen.

Dashboard	Settings	Activities	Accounts	Reports	Certificates	- Downba	Departing Manual V2.1	@
Bulk Cand	idates Settle	ment Upload						
			Upload Set	tlement Exc	el			
			Batch No			Select +		
			Upload Exce	el File		Browse Note: Prease download Candidate details exoct after selection of Batch Number. Then fill up settlement details, upload the same without changing file name. Important, "Prease do not changeducture first 4 column values in downloaded exoct.		
						Upload Cancel		

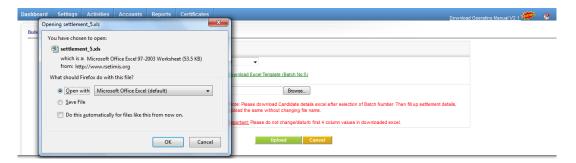
Read instructions marked in Red. Then choose batch no as shown below.

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 V
Download Excel Template (Batch No:5)
Upload Excel File Upload Excel File Note: Please do writed 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

Dashbo	ard Settings	Activities	Accounts	Reports	Certificates		Downba	d Operating Manual V2.1	1
Bulk		en to open: nt_5.xls	office Excel 97-2 mis.org	2003 Workshe	eet (53.5 KB)	x			
	What should F	vith Micros	this file? oft Office Excel for files like th		• on.		ownload Excel Template (Batch No.5) Browne. ofe: Please download Candidate details excel after selection of Batch Number. Then fill up settlement details, pload the same without changing file name.		
				ОК	Cancel		<u>portant</u> . Please do not change/disturb first 4 column values in downloaded excel. Uptoad 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.

) ~ (~ ~) =	Stational Manager, 1	-	settlement_5 Comp	atibility Mode	e] - Microsof	ft Excel			_		
Hom	ne Insert	Page Layout Formulas Data R	eview Vie	w Load Test Nitr	o Pro 7 T	eam						0 - 🕫
Paste	ору		<mark>=</mark> ≫- ≡ ≇ ≇	📑 Wrap Text 🛃 Merge & Center 🛪	General \$ • %	• 00. 00.		ormat Cell		elete Format		& Find &
Clipboa	ard 🕞	Font G	Align	nent 🕞	Numb	er Gi	Styl	,	(Cells	Editing	Seiter
W10) • (f _x										
A	В	C	D	E			F			G		F
	Candidate I	d Candidate Name	Roll No	Follow_Up Typ	e	Date	e of Follow Up	N	ame of the	e project star	ted after training	Employme
2 5	195428	Vadivel Prospective	1									
3 5	74797	candidate	2									
2 5 3 5 4 5 5 5	109171	vadivel	3									
5 5	117466	Srinivas Shenoy	4									
6												

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	Browse Note: Please download Candidate details excel after selection of Batch Number. Then fill up settlement details, upbad the same without changing the name. Important: Please do not change/disturb first 4 column values in downloaded excel.
		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)
Upload Excel File	C:\Users\CredoVelu\Dov 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.
	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 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.
	Data Error: Please select Employment Status for below Settled/Apprentice Candidate(s): Srinivas Shenoy (117466) Oproad 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_ 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

ctivities	*	Home > Activi	line o Denner	tive Condidates						
Planning		Home > Activi	ues > Prospec	uve candidates						r
Inhouse Programs										
Other Programs		SI. No.	Edit	Name	Father Name	Age	Caste	Nativity Area	Marital Status	L
Visitors		1	1	selvaraj	arumugam	21	OBC	Rural	Married	1
Tour Programme		2	1	FASDES	к	21	SC	Urban	UnMarried	ť
Search Candidates		3	1	moorthi	к	22	ST	Urban	UnMarried	1
Training Cost		4	1	suruli	к	21	ST	Rural	Married	f
Upload Excel Cand.		5	1	karthik	к	20	OBC	Rural	Married	1
LAC Meeting										

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 🔻	Person with Disability	Select 💌
Sex *	Select	Poverty Line *	Select
Marital Status *	Select		
	Landine: -	SGSY to SGSY/Govt. Sponsored	No 👻
Phone No for communication	Mob1: (10 digit number only) Mob2: (10 digit number only)	Occupation of the Family	Select
Present Occupation of the Candidate	Unemployed	Email ID	
ntact Details			Available Take Photo from Wel
Nativity Area *	Select 🗸		
Address		Hohi / D	nat l
Address			
Viliana	nts		

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	Ô
2	1	FASDES	к	21	SC	Urban	UnMarried	Ê
3	1	moorthi	к	22	ST	Urban	UnMarried	Û
4	1	suruli	к	21	ST	Rural	Married	Ê
5	1	karthik	к	20	OBC	Rural	Married	Û

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:

shboard Settings	Activities	Ac	counts	Reports	Certificates									Download Op	erating Manual	<u>v2.1</u>	1
Activities		Home	> Activ	ities > Program	ns												
Training/Inhouse Prog Other Programs	grams																4
Visitors		SI. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Can	didates	Total Cand.	Boarding Details	Batch Summary	Cand. Feedbac	
Tour Programme Search Candidates		1		WE	rubber tapping	5	Agricultural	Zilla Panchayat	04 Feb 2013	28 Feb 2013	Add	🖗 view	24	Add	View	View	 E
Bulk Candidates Upload		2	1	SE	gems & Artificial jewellary	4	Product EDPs	District / Zilla Panchayat	08 Jan 2013	31 Jan 2013	Add	🚯 view	25	Add	View	View	ដ
Upload Settlement Excel 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	ť
Prospective Candidates		4	1	SE	Dairy Farming	2	Agricultural EDPs	Self	08 Mar 2012	15 Mar 2012		🚯 View	23	Add	View	View	ĩ

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 Progra	ms Hon	ne > Inhouse P	rograms > Pros	pective Cand	dates						
Other Programs		Search Pro	spective Can	didates							
Visitors			Faar	h By Name			Training Interested Type		-		
Tour Programme			Searc	in by Maille	•				•		
Search Candidates						Search	h Show All				
Bulk Candidates Upload	So	ect / Add P	ospective (andidates	for rubber tapp	aing (5)					
Jpload Settlement Exce	·										
AC Meetings	SI		Age Se			Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Selec
Prospective Candidates		l 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				-								
Training/Inhouse Programs	Home	> Inhouse P	rograms > I	Prospectiv	re Candid	ates						
Other Programs	🦕 S	earch Pros	spective C	Candidate	es							
Visitors								Training Interested Type				
Tour Programme			50	earch By	Name	-		I raining interested Type		•		
Search Candidates							Search	h Show All				
Bulk Candidates Upload	Solor	t / Add D	ornectiv	o Candi	idatos f	or rubber tapp	aing (5)					
Jpload Settlement Excel			oopoour	o ounui	uatoon	or report capt	g (o)					
AC Meetings	SI No	Name		Sex	Caste	Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Select
Prospective Candidates	1	selvaraj	21 F	emale	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	

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

Activities	Þ											
Training/Inhouse Programs	Home	> Inhouse F	Program	s > Prospec	tive Candi	Jates						
Other Programs	<u>s</u> , :	Search Pro	specti	e Candida	tes							
/isitors				Search By	Harry			Training Interested Type				
our Programme				Search by	Name	•		Training Interested Type		•		
earch Candidates							Search	Show All				
lulk Candidates Upload	Sele	rt / Add P	rosner	tive Can	lidates	for rubber tapp	ing (5)					
Jpload Settlement Excel		otritida i		uro oum	induced							
AC Meetings	SIN	o Name		Sex	Caste	Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Selec
Prospective 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	nome	> Inhouse i	rogram	s > Prospec	tive Candi	Jates		Training Interested Type Search Show All				
Other Programs		Search Pro	spectiv	e Candida	ites							
/isitors				Search By	Mana			Technic Interested Terrs				
our Programme				Search by	Name	-		training interested type		•		
earch Candidates							Search	Show All				
ulk Candidates Upload	Solo	ct / Add P	rospor	tive Can	didates	for rubber tapp	aing (5)					
pload Settlement Excel		cer nuu r	rospec	ure cui	andates		ang (s)					
AC Meetings	SI N		Age	Sex	Caste	Poverty Line	Training Intrested Type	Training Intrested SubType	Nativity Area	District	State	Sel
rospective Candidates	1	selvaraj	21	Female	SC	APL	Agricultural EDPs	Bee Keeping	Rural	BANGALORE (U)	Karnataka	

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:

ashboard	Settings	Activitie	es	Accounts	Reports	Monthly Report	Communication	n					D	ownload Opera	ting Manual V2.2 🐲	ĥ
Program Co		¢	lome	> Activities >	Program Cos	t										
	use Programs				1											
Other Program	ims		FR	OM MORD	FROM	OTHERS										
Tour Program	nme															
Search Cand																
Training Co	ost		SI. No.		Progr	am Name	Batch No.	Start Date	End Date	Total Days	Total Cand.	BPL Cand.	Trng. Cost	BPL Refund	Status	
Bulk Candidat			1	Dairy Farmin	ng		201	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select	•
Upload Settle	ement Excel		2	Dairy Farmin	ng		200	Jan 18, 2013	Jan 23, 2013	6	30	6		7200	Select	•
LAC Meetings	S		3	Dairy Farmir	ng		199	Jan 18, 2013	Jan 23, 2013	6	20	20		24000	Select	-
Prospective (Condidatoo						194	Dec 15, 2012	Dec 00, 0040	6	10	10		12000	Select	
ricopective	Canuluates		4	EDP - Beaut	y Parior											•

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	BPL Refund	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:

ashboard Setting	Activities	Accounts	Reports	Monthly Report	Communication				Download Operating	g Manual V2.2 🐗
Program Cost	\$									
Training/Inhouse Prog	ams Ho	me > Activities	> Program Cost							
Other Programs										
Visitors		FROM MORD	FROM OT	THERS						
Tour Programme										
Search Candidates										
Training Cost						Trair	ning Cost			
Bulk Candidates Uploa	d	SI. No.	Program Nam	ne Batch	h No. Claimed	Claimed Date	Received	Received Date	Description	Document
Upload Settlement Exc	el					No records fo	und.			
LAC Meetings										
Prospective Candidate	s									
Annual Action 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				
Training/Inhouse Programs	-					
Other Programs		Add Training Cost				
Visitors		Orgar	nisation Name	RUDSETI	Institute Name	RUDSETI Baran
Tour Programme		Pe	tch Number *	Select V	Program Name	
Search Candidates						
Training Cost		Training C	ost Claimed *		Claimed Date *	
Bulk Candidates Upload		Training Co	st Received *		Received Date *	
Upload Settlement Excel		Training	Cost given by	Select 👻	Upload File, if any	Browse_
LAC Meetings						
Prospective Candidates			Description			
Annual Action Plan			Description			

* indicates mandatory fields

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

Dashboar	d Settings	Activities	Acco	ints Repo	rts Monthly	Report	Communicatio	on			Download Operating Manual V2.2	1
-	am Cost	Ho	me > Acti	vities > Program	Cost							
Training	g/inhouse Programs	=										
Other P	rograms		FROM M	000 50	OM OTHERS							
Visitors	5		FROM M		OW OTHERS							
Tour Pr	ogramme											
Search	Candidates											45
Training	g Cost						Tra	ining Cost				
Bulk Ca	indidates Upload	:	SI. No. F	rogram Name	Batch No.	Claimed	Claimed Date	e Received	Received Date	Description	Document	
Upload	Settlement Excel		1 Da	ry Farming	201	12000	11/04/2013	10000	26/04/2013	nothing	<u>i</u>	
LAC Me	eetings											
Prospe	ctive Candidates											
Annual	Action Plan											
						Training	Cost					
SI. No.	Program Nar	ne Ba	atch No.	Claimed	Claimed [Date R	eceived R	eceived Date		Description	Document	
1	Dairy Farming		201	12000	11/04/2013	10	000 26/	04/2013	nothing		🔍 🧪	

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

Activities	<u>م</u>	ome > Activities >	A second A set	e Plan					
Training/Inhouse Programs		Jine > Activities 3	Annual Actio	in man					
Other Programs		Annual Action P	lan						
Visitors		Organi	sation Name	RUDSETI	Institute Name	RUDSETI Baran	Financial Year	Select 👻	
Tour Programme									
Search Candidates									
Training Cost									
Bulk Candidates Upload									
Upload Settlement Excel									
LAC Meetings									
Prospective Candidates									

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

al Action Plan						
Organisation Name	RUDSETI	Institute Name	RUDSETI Baran	Financial Year	Select	-
					Select	
					2013 - 2014	1

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 RI	JDSETI		
			Financ	ial Year	2013 - 2014	•									
							Honorarium		Lodging			Travelling	Travelling /		
Program Sub Type	Cat.	No. of Prgms	No. 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	+	L	<u> </u>			l	L	I	1	I	L	(1	1
rocess ED)P 🕂														
Product EDI	77777777														
General EDI															
Skill Upgrad	dation	•													

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	p 🛉														
General EDI	р 🕂														
Skill Upgrad	dation	+													
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	Candidates	Total	Faculty /		Expenses		Training	Travelling Allowance for Trainees (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

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

Program Sub Type	Cat.	No. of Prgms					Honorarium for External Faculty / Assistant (Rs.)	Boarding Expenses (Rs.)	for	Printing / Stationary Expenses (Rs.)	Training	Travelling	Travelling / Monitoring and Follow-Up Expenses (Rs.)	Misc. / Travel Expenses	Opening / Closing Expenses (Rs.)	
Agriculture EDP 🕂																
Advanced Dairy Management	- SE -	3	30	90	32	96	20000	2000	3000	3455	4567	2333	100	0	0	1
Process EDP 🕂																////
Product EDP 🕂																777
General EDP 🕂																
Skill Upgradation 🕂																

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

oard Settings Acti							1
Bank A/C	Home > A	ccounts > Ba	nk A/C			Click bara to add more P	Pank Assounts
Current Budget Period						Click here to add more B	ank Accounts
Cash Balance			Bank Name	Brach	City	Bank Balance	
Credit Slip	1	1	ABC Bank	Branch	City	Add / Edit Balance	Û
Debit Slip	2	4	XYZ Bank	Branch	City	Add / Edit Balance	_

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.

						¢
		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	Ê
3	1	RST Bank	Branch	City	Add / Edit Balance	

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.

tome > Accounts > Bank A/C			
Add Bank Amount			
Institute	RSETI - Demo	Bank	ABC Bank
Year	Select 💌	Amount *	
	Save	Cancel	

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 Acti	itties Accounts Reports	۹ ه
Accounts Bank A/C	Home > Accounts > Current Budget Period	
Current Budget Period	View Budget Period	
Cash Balance	Current budget year starts from	
Credit Slip Debit 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.

Dashboard Settings	Activ	ities Accounts	Reports	🔹 😢 🕞
	<u>a</u> =			
Accounts	2	Home > Accounts >	> Cash Balance	
Bank A/C				
Current Budget Period		View Cash Balan	ice 📝	
Cash Balance			Opening Cash Balance	
Credit Slip			opening opening	
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 Bank A/C	\$	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	Activi	ties Accounts R	eports					🔅 🖗
Bank A/C	¢	Home > Accounts > Del						
Current Budget Period Cash Balance Credit Slip		💃 Search Debit Slip)\$	Debit Slips From	To			
Debit Slip					Search Show All			4
		Date	Slip No	Expenditure Type	Account Head No records found.	Amount Debited	Mode of Debit	

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.

bit 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	To	
	Search Show All	

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