85981

F.No. E-12/6/2015 - DS (Admin) - Secy (IT)/2922   Dated: 29-04-2016

CIRCULAR

It is observed that EMD Managers/Administrators are not able to active /deactive/file transfers in e-office application in case of transfer/posting/Retirement/Promotion of employee.

IT Dept., GNCTD has chalked out a Standard Operating Procedure (SOP) in consideration with e-office unit of NIC which are given as under:-

1. SOP in case of Transfer of employee from one to another branch within the same Department (Annexure 1).

2. SOP in case of Transfer Posting of employee from one Department to another Department (Annexure 2)

3. SOP in case of Promotion of employee within the same Department (Annexure 3)

4. SOP in case of Promotion and transfer to another Department (Annexure 4)

5. SOP in case of Retirement of employee (Annexure 5)

EMD Manager:- In case of transfer/Promotion/Retirement of EMD Manager, the same be informed to Sh. Santulan Chaubey, through his email santulan@nic.in indicating the new EMD Manager.

All EMD Managers are directed to go through the said SOPs and shall act immediately according to said SOPs.

28/04/16

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<u>Standard Operating Procedure (SOP) for Transfer Posting of employee within Department</u>

<u>Event 1: Transfer within same Department [Global Organization]</u>

An Employee gets transferred from one organization unit (section/office) to another organization unit (section/office) within the same Global Organization Unit (Organization/Department/Ministry/Secretariat)

Example: Mr. Singh transferred from Cash Section (SO-Cash) to Admin Section as (SO-Admin) and Mr.Madhav having post (SO-Admin) transferred from Admin Section to Cash Section as a (SO-Cash) within the same department i.e. in Department of Revenue. *(Interchange)*

Step 1: Login by EMD Manger in A/c of Revenue Dept.

Step 2: De assign Mr. Singh from the post (SO-Cash).

1. Go to **Employee** tab→**Posting and Promotions**→Search user with the **Employee Code, Employee Name etc.** (whose post needs to be de-assigned)

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

Step 3: De assign Mr. Madhav from the post (SO-Admin).
       Same as step 2

Step 4: Map Mr. Madhav with the post **(SO-Cash),** Marking abbreviation and Concerned Organization   unit.

1. Go to **Employee** tab→**Posting and Promotions** →Search user   with   the **Employee**

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Code, Employee Name etc. →after selecting the **employee concerned** or press **Enter.**

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

3. After completing the above mentioned steps click on **Save** button.

Step 5: Map Mr. Singh with the post **(SO-Admin),** Marking abbreviation and Concerned Organization unit.

　　　　　Same as Step 4

Step 6: Transfer Files/Receipts from Mr. Madhav old post i.e. **(SO-Cash)** to Mr.Singh new post **(SO-Cash).**

1. Login in Admin A/c

2. In Home Page click File Management System -→ Setting -→ Transfer

3. Select **Department, Section and Transfer from** where the file needs to be transferred.

4. Click on **Search** button present at the bottom.

5. All folders i.e. Inbox, Created, Parked, Closed will be displayed.

6. Select folders from the check box from where you want to transfer the files.

7. Select **Department, Section, and Transfer To** whom the file is getting transferred.

8. Click on **Transfer button.**

9. After clicking on transfer button a prompt will be open where you need to **upload** the concerned T**ransfer Order Document** and give necessary **Remarks.**

10. Click **OK.** Files will get transferred.

Step 7: Similarly, Transfer Files/Receipts from Mr. Singh old post i.e. SO (Admin) to Mr. Madhav new post SO (Admin).

　　　　　Same as Step 6

Standard Operating Procedure (SOP) for Transfer Posting of employee One Department to another Department Globally

A user gets transferred from one Department/Organization to another   Department/Organization

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

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

Step 1: Initiate Transfer for Ms. Nazia.

1. Login in EMD Manager A/c credentials of **Department of Economic Affairs.**

2. **Click on Employee Master Database-→Transfer-→Click on Initiate Transfer**

3. Enter the **Details → Order Date →Order Number → To Location→Submit**

4. **Click on Employee Master Database-→Transfer-→Click on Inbox**

5. **Save→Finalize and Relieve .** A message prompts **"Record Saved Successfully"**

Step 2: Create a New User Mr. Brijesh.

Step 3: Map Mr. Brijesh with the Post **(DIR-DEA),** Marking abbreviation and Concerned Organization unit

Step 4: Login in EMD Manager A/c credentials of **Department of Revenue:-.** Initiate Joining for Ms. Nazia.

Initiate Joining for Ms. Nazia from EMD of Department of Revenue.

1. After **login** in to EMD, **Click on Employee Master Database-→Transfer-→** Click the **Transfer Joining Inbox** link.

2. List of transferred Users along with the status will be shown.

3. Click on **Edit** link, the List of Transferred Employee screen

4. Enter the **Designation, Actual Joining Date→ Save** button→**Submit** button.

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

1. Go to **Employee** tab→**Posting and Promotions** →Search user with the **Employee Code, Employee Name etc. → after selecting the employee concerned** or press **Enter.**

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

3. After completing above mentioned steps click on **Save** button.

Step 6: Transfer Files/Receipts from Ms. Nazia previous post **(DIR-DEA)** to Mr. Brijesh new Post.

2.1 TRANSFER OF FILES/ THROUGH eFileADMINISTRATOR

1. Login in Admin A/c

2. In Home Page click File Management System -→ Setting -→ Transfer

3. Select **Department, Section and Transfer from** where the file needs to be transferred.

4. Click on **Search** button present at the bottom.

5. All folders i.e. Inbox, Created, Parked, Closed will be displayed.

6. Select folders from the check box from where you want to transfer the files.

7. Select **Department, Section, and Transfer To** whom the file is getting transferred.

8. Click on **Transfer button**.

9. After clicking on transfer button a prompt will be open where you need to **upload** the concerned T**ransfer Order Document** and give necessary **Remarks**.

10. Click **OK**. Files will get transferred.

SOP for Promotion of employee in the same Department

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

Step1: Login in EMD with Local Admin credentials of Department of Economic Affairs.

Step 2: De-assign the post Assistant (Admin) from Ms. Nazia.
Login in EMD through Local Admin→Employee Tab→Posting and Promotion →Search employee→ deactive the post from check box and enter to date(till date user is having charge of that post)→ save

Step 3: Create a New User Mr. Brijesh.

Step 4: Map Mr. Brijesh with the post Assistant (Admin),Marking abbreviation and Concerned Organization unit.
Login in EMD through Local Admin→Employee Tab→Posting and Promotion →Search employee→ Click on check box→Select the post of employee→Marking abbreviation→Organization unit→Save

Step 5: Transfer Files/Receipts from Ms. Nazia's old post to Mr. Brijesh.
1. Login in Admin A/c

2. In Home Page click File Management System -→ Setting -→ Transfer

3. Select **Department, Section and Transfer from** where the file needs to be transferred.

4. Click on **Search** button present at the bottom.

5. All folders i.e. Inbox, Created, Parked, Closed will be displayed.

6. Select folders from the check box from where you want to transfer the files.

7. Select **Department, Section, and Transfer To** whom the file is getting transferred.

8. Click on **Transfer button**.

9. After clicking on transfer button a prompt will be open where you need to **upload** the concerned **Transfer Order Document** and give necessary **Remarks**.

10. Click **OK**. Files will get transferred.

Step 6: Map Ms. Nazia with the post (SO-Cash), Marking abbreviation and Concerned Organization unit.
Same as Step 4

<div align="right">Annexure 4</div>

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

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

Step1: Login with the Local Admin credentials of Department of Economic Affairs.

Step 2: Initiate Transfer for Ms. Nazia.
Login in EMD Manager A/c credentials of **Department of Economic Affairs.**

1. **Click on Employee Master Database-→Transfer-→Click on Initiate Transfer**

2. Enter the **Details □ Order Date □Order Number □ To Location→Submit**

3. **Click on Employee Master Database-→Transfer-→Click on Inbox**

4. **Save□Finalize and Relieve .** A message prompts **"Record Saved Successfully"**

Step3: Create a New User Mr. Brijesh in EMD.

Step 4: Map Mr. Brijesh with the Post(ASST-EA), Marking abbreviation and Concerned Organization unit

Login in EMD through Local Admin→Employee Tab→Posting and Promotion →Search employee→ Click on check box→Select the post of employee→Marking abbreviation→Organization unit→Save

Step 5: Transfer Files/Receipts from Ms. Nazia's previous post to Mr. Brijesh's new post
1. Login in Admin A/c

2. In Home Page click File Management System -→ Setting -→ Transfer

3. Select **Department, Section and Transfer from** where the file needs to be transferred.

4. Click on **Search** button present at the bottom.

5. All folders i.e. Inbox, Created, Parked, Closed will be displayed.

6. Select folders from the check box from where you want to transfer the files.

7. Select **Department, Section, and Transfer To** whom the file is getting transferred.

8. Click on **Transfer button**.

9. After clicking on transfer button a prompt will be open where you need to **upload** the concerned **Transfer Order Document** and give necessary **Remarks**.

10. Click **OK**. Files will get transferred.

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

Step 7: Initiate Joining for Ms. Nazia from EMD of Department of Revenue.

1. After login in to EMD, Click on Employee Master Database-→Transfer-→ Click the Transfer Joining Inbox link.

2. List of transferred Users along with the status will be shown.

3. Click on Edit link, the List of Transferred Employee screen

4. Enter the Designation, Actual Joining Date☐ Save button☐Submit button.

Step 8: Map Ms. Nazia with the Post (SO-REV1), Marking abbreviation and Concerned Organization unit EMD of Department of Revenue.

SOP for Retirement of employee

Scenario: A User Mr. Singh is getting retired and Files/Receipts will be transferred to Concerned.

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

Step 2: De-assign the post of retired user Mr. Singh:-

Login in EMD through Local Admin→Employee Tab→Posting and Promotion →Search employee→ deactive the post from check box and enter to date(till date user is having charge of that post)→ save

Step 3: Transfer Files / Receipts from Mr.Singh's to the concerned officer's Post Login in Admin A/c

1. In Home Page click File Management System -→ Setting -→ Transfer

2. Select **Department, Section and Transfer from** where the file needs to be transferred.

3. Click on **Search** button present at the bottom.

4. All folders i.e. Inbox, Created, Parked, Closed will be displayed.

5. Select folders from the check box from where you want to transfer the files.

6. Select **Department, Section, and Transfer To** whom the file is getting transferred.

7. Click on **Transfer button**.

8. After clicking on transfer button a prompt will be open where you need to **upload** the concerned **Transfer Order Document** and give necessary **Remarks**.

9. Click **OK**. Files will get transferred.

Step 4: Inactive the Employee (Mr. S.K. Singh) from EMD

Login to EMD from local admin→Employee tab→Employee→Search Employee→click action(edit)→uncheck the active check box→provide to Date→click on submit button