



User Manual of Establishment Module





1. General Information

1.1 Acronyms and Abbreviations:

<u>S. No.</u>	Word / Acronyms	Definition / Abbreviation
1	ERP	Enterprise resource planning
2	CAU	Central Agricultural University
3	HRA	House Rent Allowances
4	DA	Dearness Allowances
5	LWP	Leave Without Pay
6	TA	Travelling Allowance
7	NPS	New Pension Scheme
8	GPF	General Provident Fund
9	CPF	Central Provident Fund







Click (with 'ctrl' button) on below link or copy and paste it in any browser (It is advised to use Google Chrome[©]) to open the **CAU ERP** Login Page.

http://120.138.8.151:8080/cau-iums/

Note: If user clicks on the above-mentioned link then application will be launched in default browser.

User will be navigated to CAU Login Page, as shown below. From Login Page; user will be able to enter 'User ID' & 'Password':

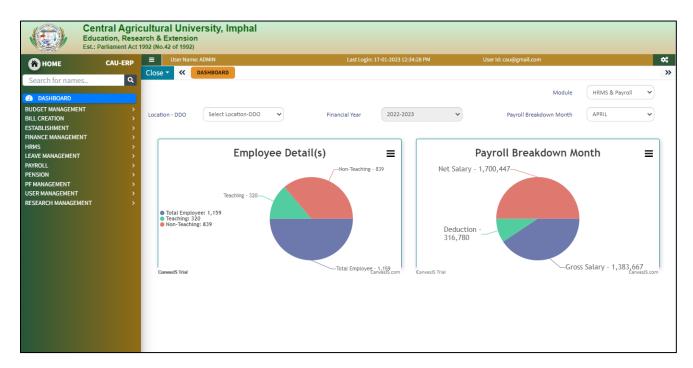


Enter the valid 'User ID' and 'Password',

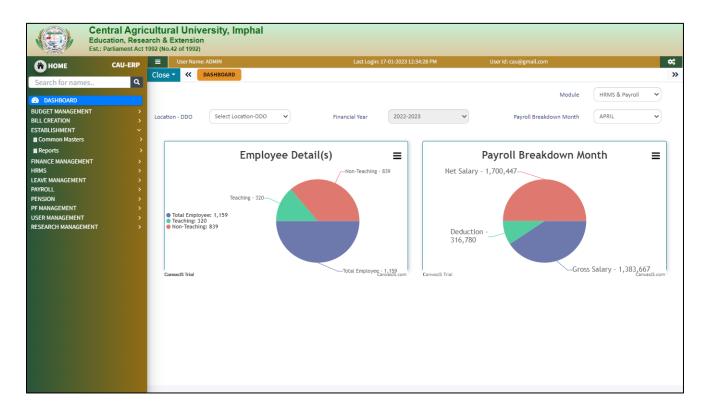
For Example: User ID- cau@gmail.com and Password-cau@gmail.com and Password-cau@gmail.com then click on 'Login to Continue...' button to navigate to 'Module Home Page' as shown below:







• Click on **'Establishment'** menu from left side, then sub menu list will be displayed as **'Common Master'** & **'Reports'** as shown below:



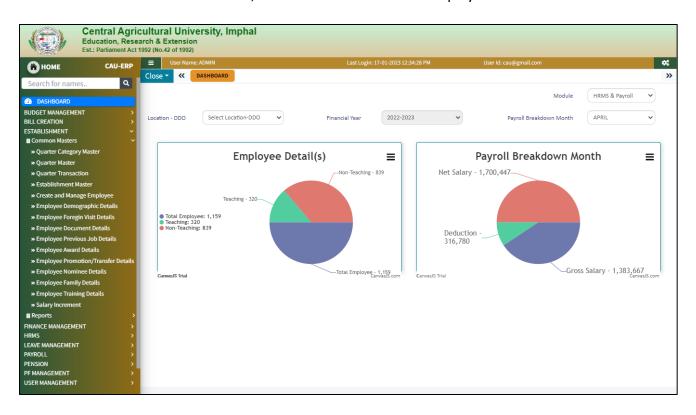
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• Click on 'Common Master' menu, then sub menu list will be displayed as shown below:





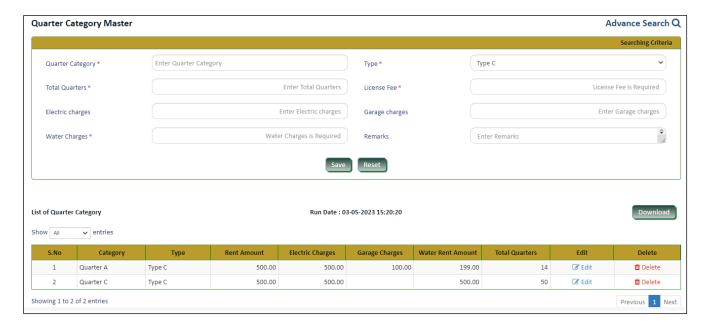


Common Masters

1. Quarter Category Master:

Using this page, Admin user can create quarter category to mapped with different quarter like quarter A, quarter B, quarter C etc. created quarter categories will be used in 'Quarter Master' page to create Employee Quarter.

• Click on 'Quarter Category Master' menu link, under 'Common Master' sub menu, then page will be opened as shown below:



- Enter data in mandatory field.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Quarter Category' table.
- On page load, it will display all saved city categories in 'List of Quarter Category' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created quarter category by clicking on 'Edit' button from saved quarter categories in 'List of Quarter Category' table.
- If created record(s) is in use in any other pages then it cannot be deleted.





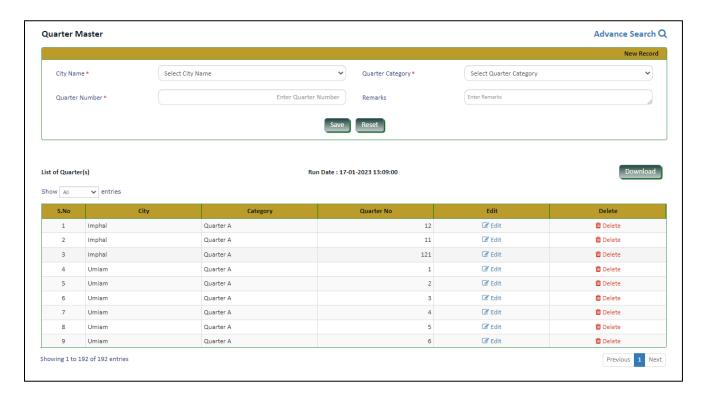


2. Quarter Master:

Using this page, Admin user can create Quarter details; created quarter will be used in 'Quarter Transaction' page for allocating quarter to employee, accordingly quarter related heads will be calculating on 'Create & Manage Employee Master' page.

Note: HRA will not be applicable for quarter allocated employee.

• Click on 'Quarter Master' menu link, under 'Common Master' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Quarter(s)' table.
- On page load, it will display all saved quarters in 'List of Quarter(s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created quarter by clicking on 'Edit' button from saved quarters in 'List of Quarter(s)' table.
- If created record(s) is in use in any other pages then it cannot be deleted.

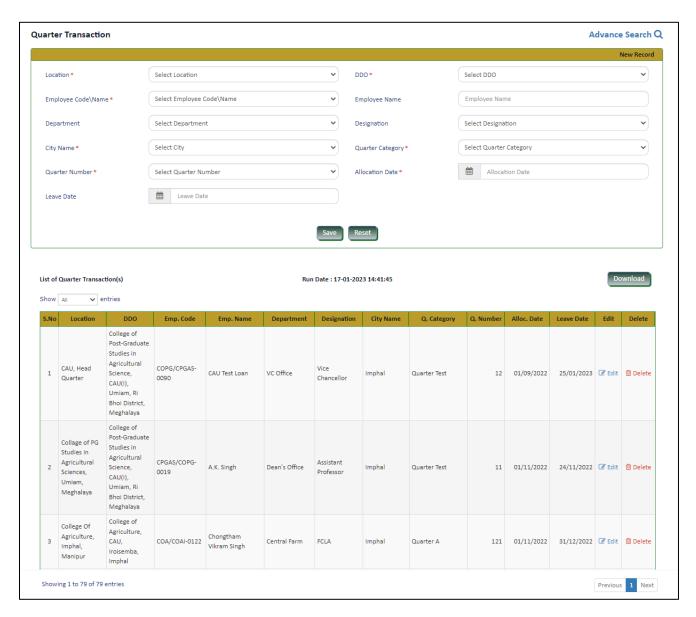




3. Quarter Transaction:

Using this page, Authorized user can allocate quarter to active employees; Allocated Quarter will be displayed in 'Create and Manage Employee' page.

• Click on 'Quarter Transaction' menu link, under 'Common Master' sub menu, then page will be opened as shown below:







- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Quarter Transaction (s)' table.
- On page load, it will display all saved quarter transaction in 'List of Quarter Transaction (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created quarter transaction by clicking on 'Edit' button from saved quarter in 'List of Quarter Transaction (s)' table.
- If created record(s) is in use in any other pages then it cannot be deleted.

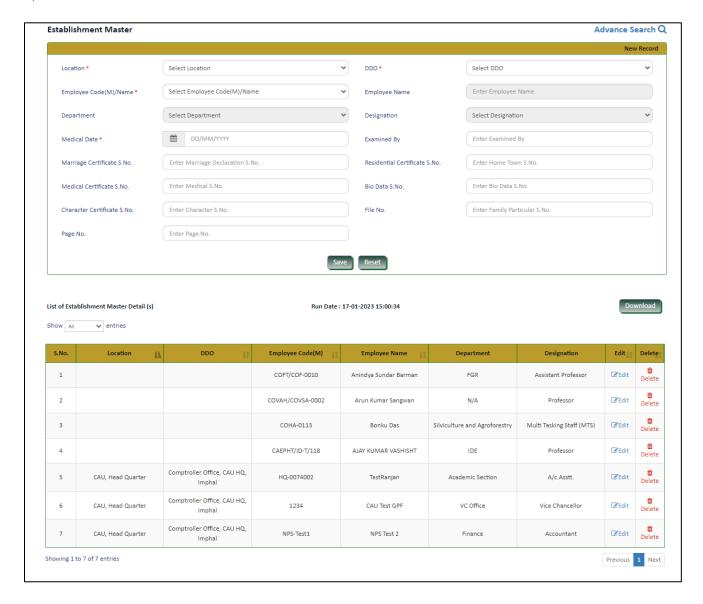




4. Establishment Master:

Using this page, Authorized user can create and manage establishment detail for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on **'Establishment Master'** menu link, under **'Common Master'** sub menu, then page will be opened as shown below:







- Enter the data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Establishment Master Detail(s) (s)' table.
- On page load, it will display all saved establishment details in 'List of Establishment Master Detail (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record
- User can Edit/Update any created establishment detail by clicking on 'Edit' button from saved cities in 'List of Establishment Master Detail (s)' table.
- If created record(s) is in use in any other pages then it cannot be deleted.

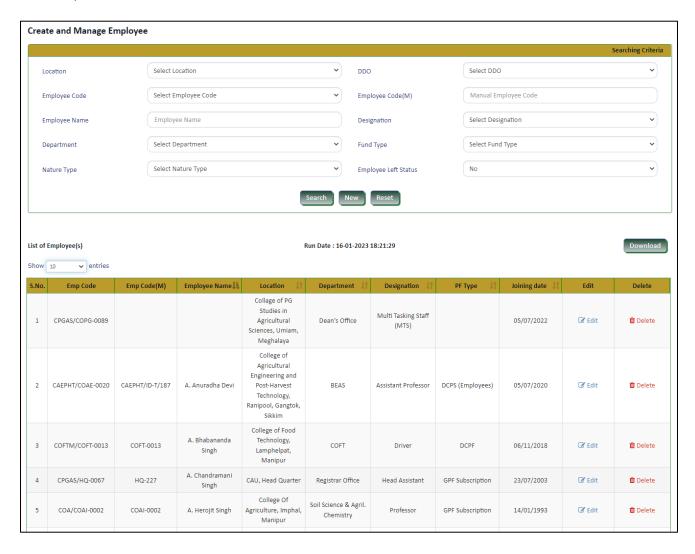




5. Create and Manage Employee:

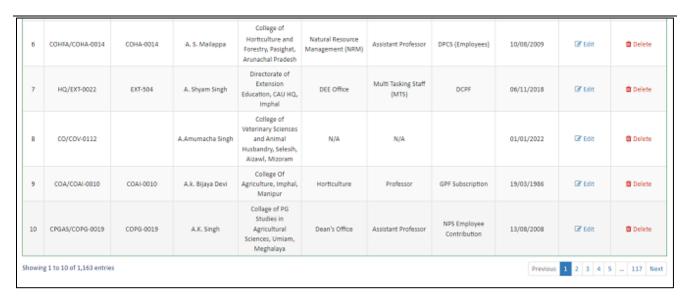
Using this page, Authorized user can create and manage Employee details, like Employee Personal details, Additional Designation, Bank Details, PF details, Salary Structure details etc., as per created post(s) from 'Post Creation Master' page.

• Click on 'Create and Manage Employee' menu link, under 'Common Master' sub menu, then page will be opened as shown below:





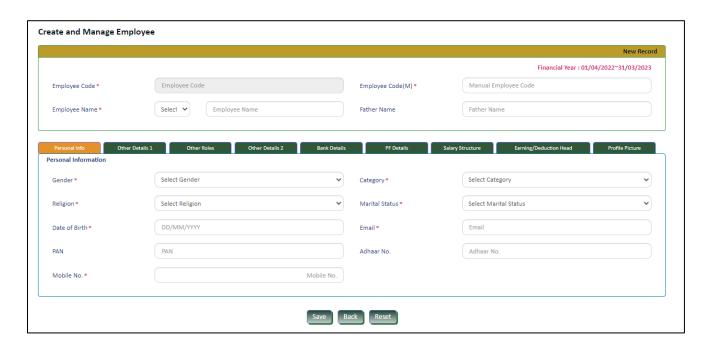




⇒ Steps to Create New Record:

• On page Load, click on 'New' button, then user will get a Screen as shown below:

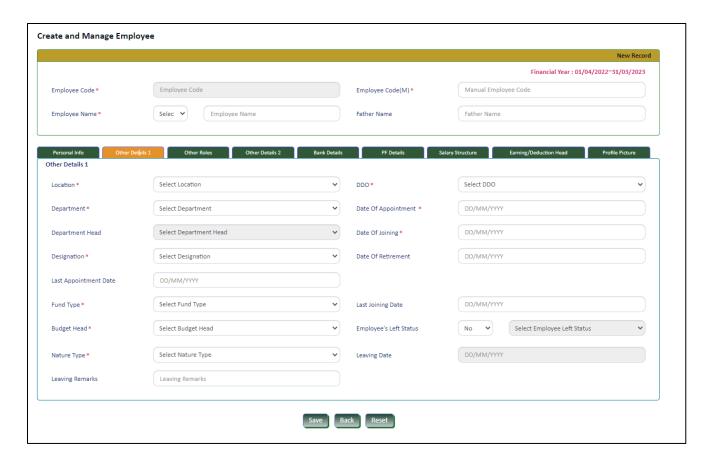
⇒ Personal Info:



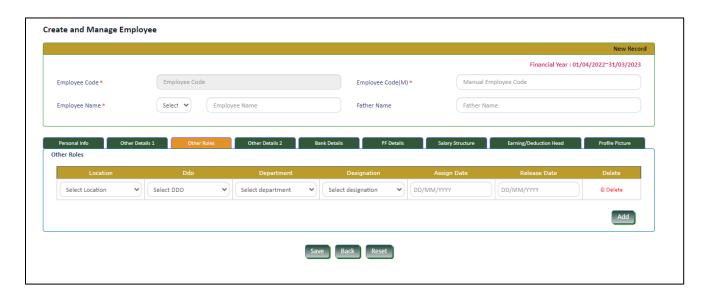




⇒ Other Details 1:



⇒ Other Role:



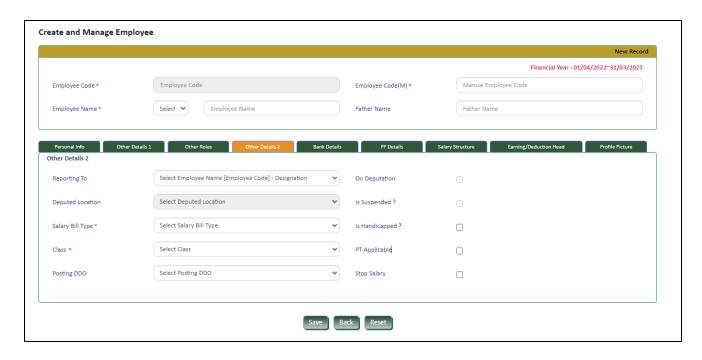
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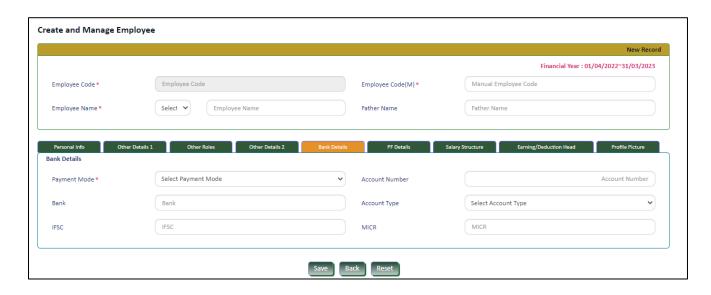




⇒ Other Details 2:



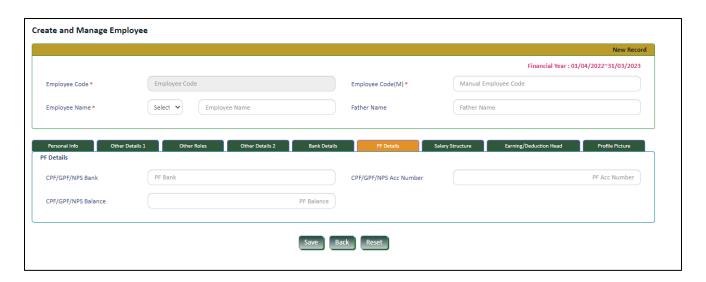
⇒ Bank Details:



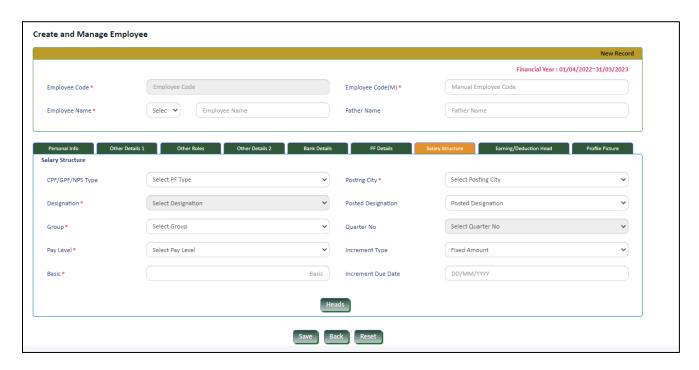




⇒ PF Details:



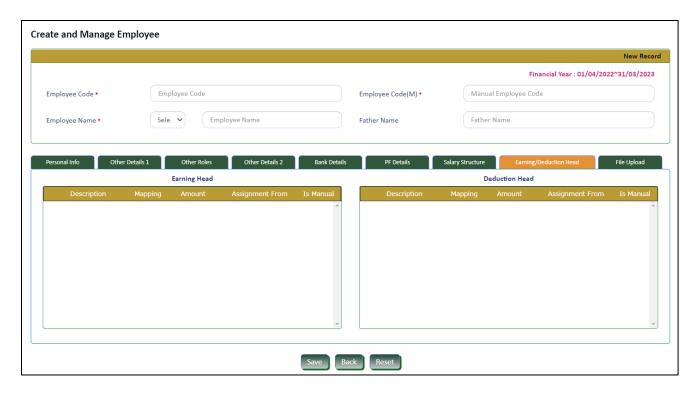
⇒ Salary Structure:



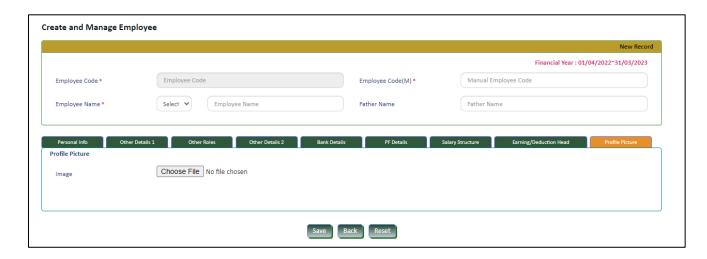




⇒ Earning/Deduction Head:



⇒ File Upload:







- Enter personal Information under 'Personal Info' tab.
- Enter details under 'Other Details 1' tab.
- Department, Designation, Fund Type, Budget Head and Nature Type will be mapped from 'Post Creation Master' page.
- Enter Other roles of Employee (If Any).
- 'Date of Appointment' should be less than or equal to 'Date of Joining' and all the salary head calculation will be done as per joining date.
- By default, 'Employee's Left Status' displays as 'No', means employees are existing in system, if it is selected as 'Yes' means user can manage their Resignation, Termination, Death etc. with date along with reason.
- User can also enter 'Increment Due Date' from this tab, increment due date will be greater than the date of joining and increment will be made accordingly from 'Salary Increment Process' page under 'Payroll' module.
- Enter details under 'Other Details 2' tab.
- Enter details under 'Bank Details' tab, under this tab user can manage account details of employee to transfer their salary/fund.
- Enter details under 'PF Details' tab, under this tab user can manage PF details of employee.
- Enter details under 'Salary Structure' tab, under this tab user enter Basic along with all the required details and click on 'Heads' button, it will redirect to 'Earning/Deduction Head' tab will all the calculated earning and deduction head.
- From 'Earning/Deduction Head' tab, user can check the calculation for both earning & deduction as per configured formula, amount, Slab etc. from 'Salary Head Master' page.

Note: i) User can change calculated earning/deduction amount by selecting 'Is Manual' check box, once Is manual check box is marked user can change amount of any head. Manually entered amount cannot be changed by clicking on Heads button.

- If Designation, Department, Fund Type, Nature, Posting City, Budget Head, Account No. etc. has been changed/updated then it will reflect on payroll reports (Under 'Payroll' module) after attendance process.
- Enter all the required credentials along with 'File Upload'
- Click on 'Save' button, then system will display a message for the user as 'Record Saved Successfully!' and record will get added in 'List of Employee(s)' table.
- Click on 'Back' button then user will be taken to the previous screen (Search Screen).
- Click on 'Search' button then it will display all the saved Employees in 'List of Employee(s)' table.
- User can Edit/Update any created employee detail by clicking on 'Edit' button from searched record.
- If created record(s) is in use in any other pages then it cannot be deleted.







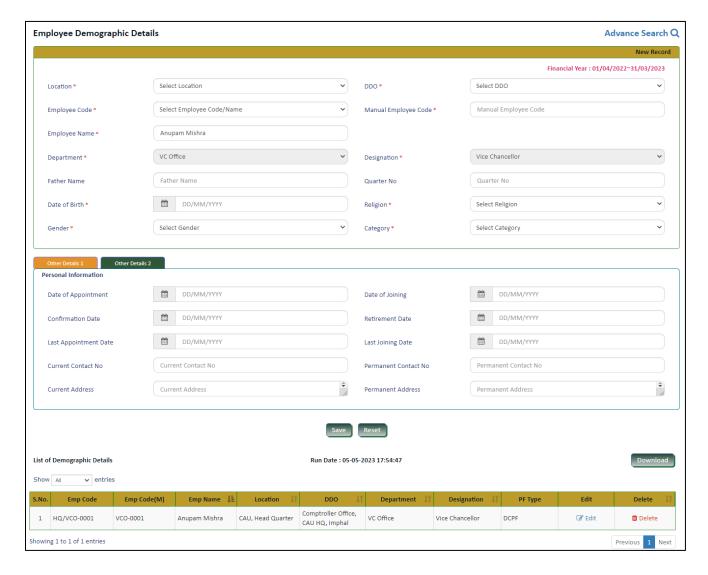
6. Employee Demographic Details:

Using this page, Authorized user can create and manage demographic detail for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

Using this page, User can maintain employee demographic details like 'Permanent Contact No', 'Current Address', 'Permanent Address', 'Identification Mark', 'Tech. Qualification' etc. in system for only those employees whose left status is 'No' from 'Create & Manage Employee' page.

• Click on 'Employee Demographic Details' menu link, under 'Common Master' sub menu then page will be opened as shown below:

Other Details 1



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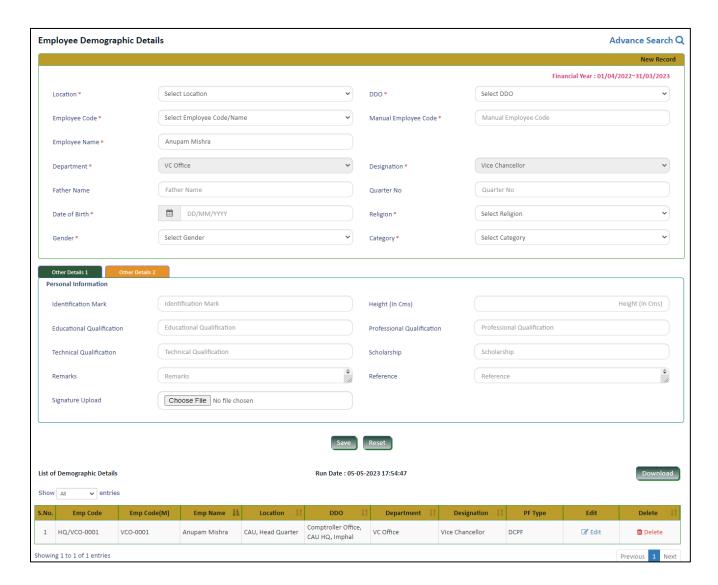
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Other Details 2



⇒ Steps to Create New Record:

- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Demographic Details' table.
- On page load, it will display all saved demographic details in 'List of Demographic Details' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record
- User can Edit/Update any created demographic details by clicking on 'Edit' button from saved demographic details in 'List of Demographic Details' table.
- If created record(s) is in use in any other pages then it cannot be deleted.

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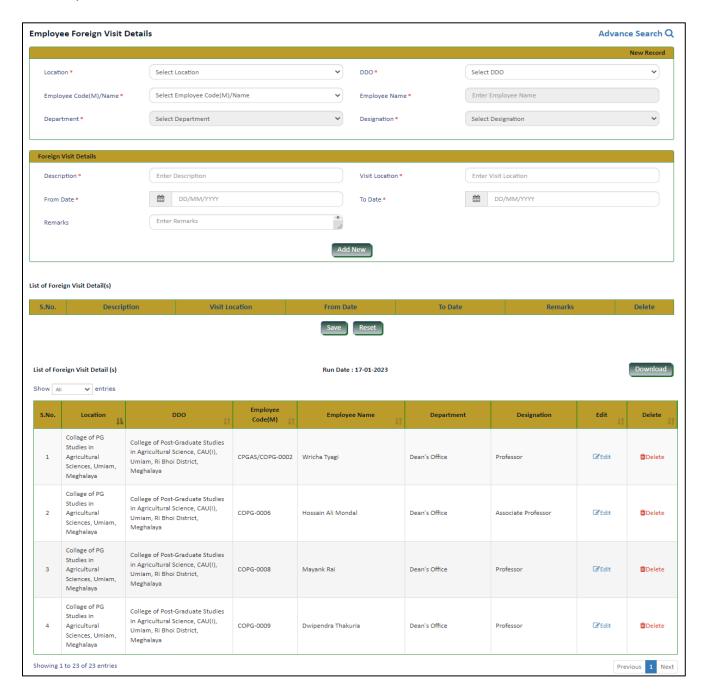




7. Employee Foreign Visit Details:

Using this page, Authorized user can create and manage foreign visit detail for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on 'Employee Foreign Visit Details' menu link, under 'Common Masters' sub menu, then page will be opened as shown below:



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- Enter the data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Foreign Visit Detail(s)' table.
- On page load, it will display all saved foreign visit details in 'List of Foreign Visit Detail(s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created foreign visit detail by clicking on 'Edit' button from saved foreign visit in 'List of Foreign Visit Detail(s)' table.
- If created record(s) is in use in any other pages then it cannot be deleted.



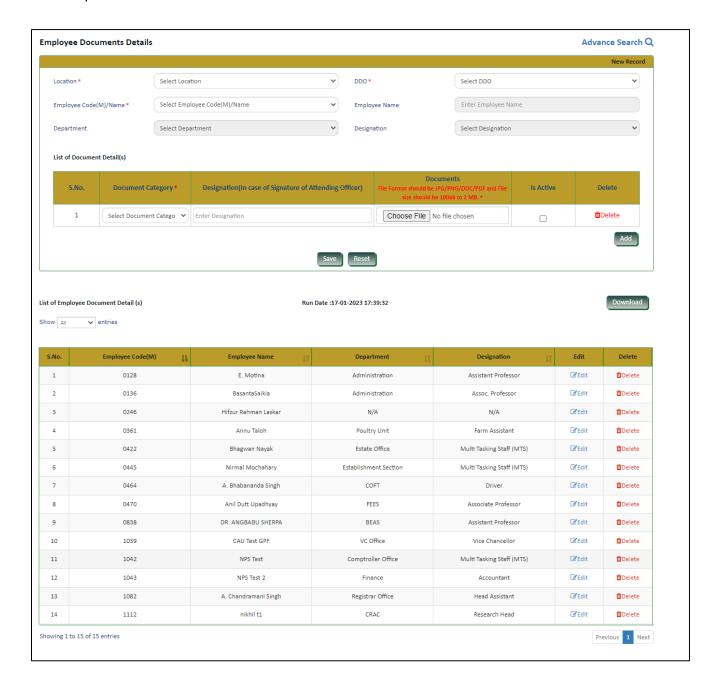




8. Employee Documents Details:

Using this page, Authorized user can upload the various document for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on 'Employee Document Details' menu link, under 'Common Masters' sub menu, then page will be opened as shown below:







- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Document Detail(s)' table.
- On page load, it will display all saved document details in 'List of Employee Document Details (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created employee document detail by clicking on 'Edit' button from saved document in 'List of Employee Document Details (s)' table.



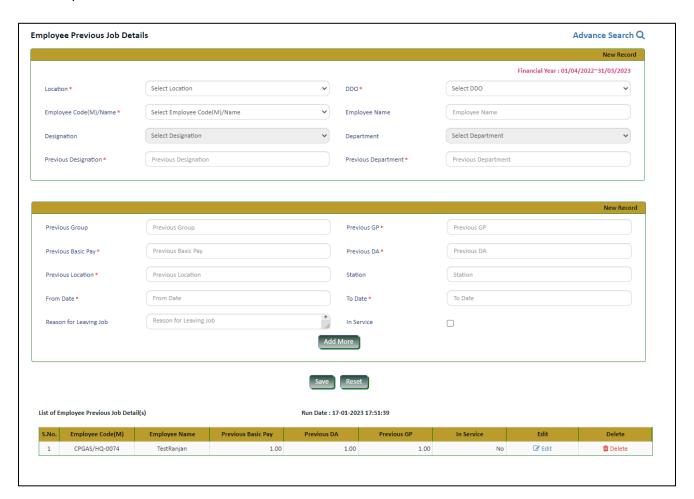




9. Employee Previous Job Details:

Using this page, Authorized user can create previous job details for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on 'Employee Previous Job Details' menu link, under 'Common Masters' sub menu then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Previous Job Details (s)' table.
- On page load, it will display all saved Employee Previous job details in 'List of Employee Previous Job Details (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created Previous Job detail by clicking on 'Edit' button from saved Previous jobs in 'List of Employee Previous Job Details (s)' table.



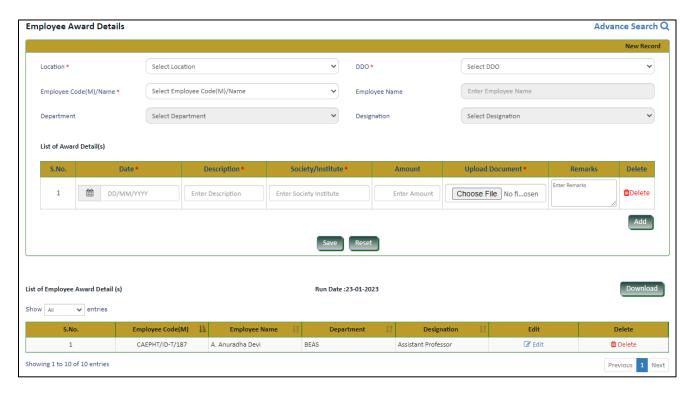




10. Employee Award Details:

Using this page, Authorized user can create and manage award details for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on 'Employee Award Details' menu link, under 'Common Masters' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Award Details (s)' table.
- On page load, it will display all saved employee award details in 'List of Employee Award Details (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created employee award detail by clicking on 'Edit' button from saved awards in 'Employee Award Details (s)' table.



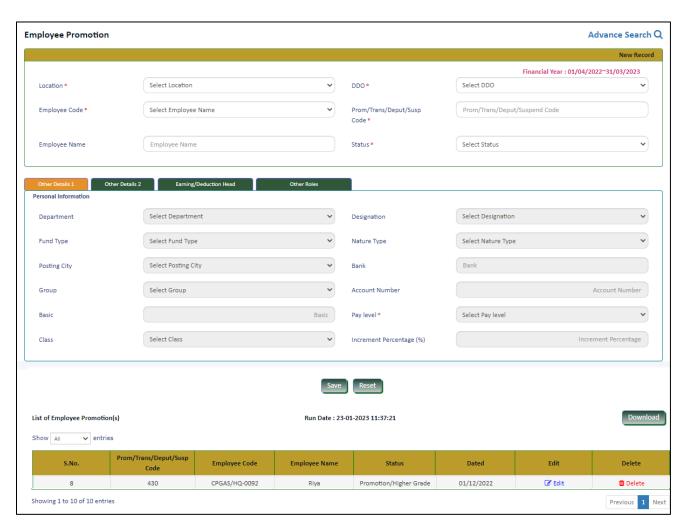


11. Employee Promotion/Transfer Details:

Using this page, Authorized user can manage Employee promotion, Employee Transfer, Employee Deputation & Employee Suspend Process for which left status is marked as 'NO' from 'Create & Manage Employee' page.

As per the changed status (Promotion, Transfer, Deputation & Suspension) employee details will get update and will be displayed on 'Create & Manage Employee' page.

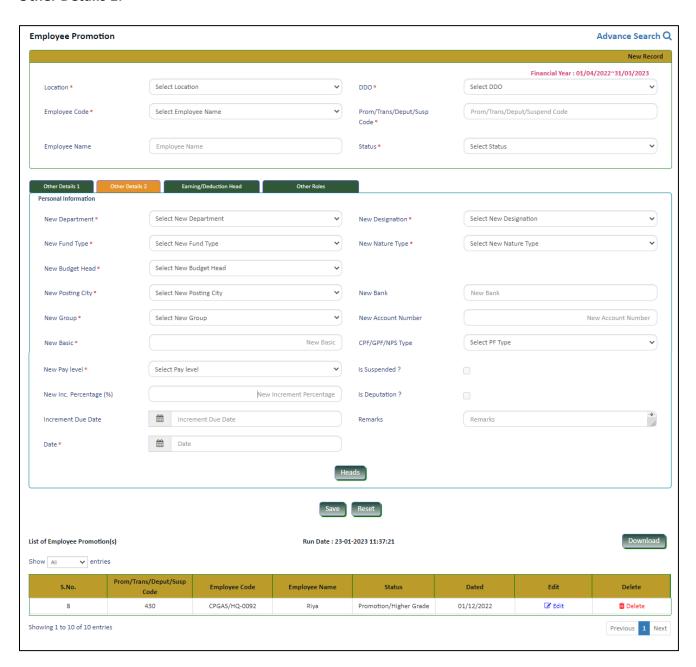
• Click on 'Employee Promotion/Transfer Details' menu link, under 'Common Masters' sub menu, then page will be opened as shown below:







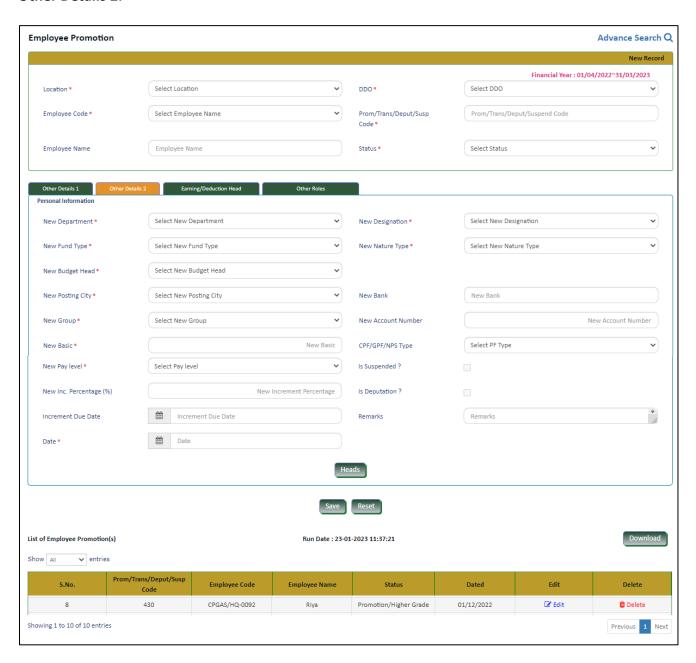
Other Details 1:



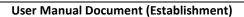




Other Details 2:

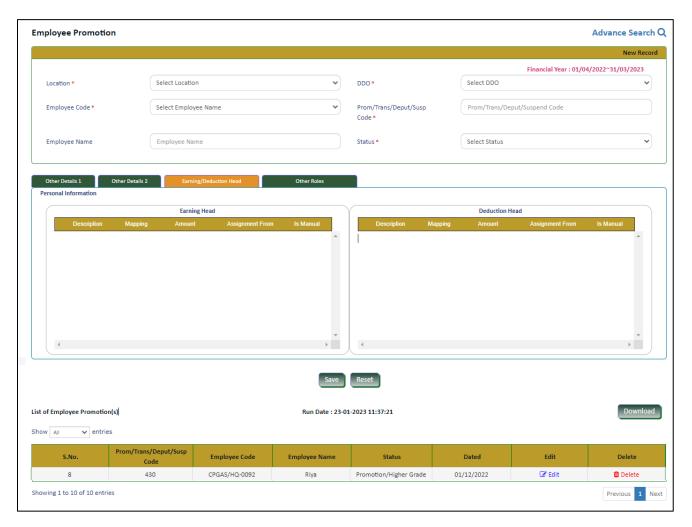








Earning/Deduction Head:



• In 'Employee Code' drop down, all those employees will be displayed whose left status is 'No' from 'Create & Manage Employee' page.

Note: As per the selected value from 'Employee Code' drop down, 'Employee Name', 'Location', 'Department', 'Designation', 'Group', 'Nature', 'Posting City', 'Fund Type', 'Budget Head', 'Bank', 'Account Number', 'Basic [Pay Band]', 'Pay Level' and 'Increment Percentage' will be filled automatically (these details has been saved in 'Create & Manage Employee' page).

• Selects value from 'Status' drop down as Promotion/Higher Grade, Transfer, Deputation and Suspended.

Note: 1) If status is selected as 'Promotion/Higher Grade' then 'New DDO' & 'New Location' drop down will be displayed as disabled, as this status will be managed in same DDO/Location.

2) If status is selected as 'Transfer' then 'New DDO' & 'New Location' drop down will be displayed as enabled, as this status will be managed in other DDO/Location and as per changed DDO/Location details will be displayed on 'Create & Manage Employee' page.





- 3) If status is selected as 'Deputation' then 'New DDO' & 'New Location' drop down will be displayed as enabled, as this status will be managed in other DDO/Location, but salary will be processed in same DDO/Location also deputation status will be displayed on 'Create & Manage Employee' page.
- 4) If status is selected as 'Suspended' then 'New DDO' & 'New Location' drop down will be displayed as disabled, as this status will be managed in same DDO/Location and salary will be managed accordingly.
- Enter details under 'Other Details 1' tab.
- Department, Designation, Fund Type and Nature Type will be mapped from 'Post Creation Master' page.
- Enter details under 'Other Details 2' tab.
- Select Date from calendar box.
- From 'Earning/Deduction Head' tab, user can check the calculation for both earning & deduction as per configured formula, amount, Slab etc. from 'Salary Head Master' page.

Note: i) User can change calculated earning/deduction amount by selecting 'Is Manual' check box, once Is manual check box is marked user can change amount of any head. Manually entered amount cannot be changed by clicking on Heads button.

• If Designation, Department, Fund Type, Nature, Posting City, Account No. etc. has been changed/updated then it will reflect on payroll reports (Under 'Payroll' module) after attendance process.

- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Promotion(s)' table.
- On page load, it will display all saved Employee Promotion/Transfer/Suspend/Deputation Details in **'List of Employee Promotion(s)'** table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any saved employee details by clicking on 'Edit' button from saved Promotions in 'Employee Promotion Details (s)' table.
- If created record(s) is in use in any other pages then it cannot be edited/deleted.

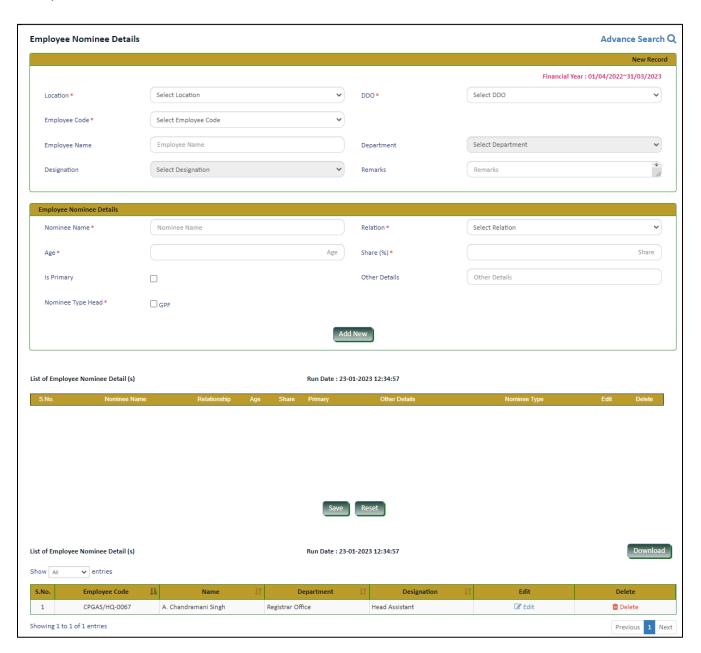




12. Employee Nominee Details:

Using this page, Authorized user can create & manage nominee details for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on 'Employee Nominee Details' menu link, under 'Common Master' sub menu, then page will be opened as shown below:







- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Nominee Details (s)' table.
- On page load, it will display all saved Nominee Details in 'List of Employee Nominee Details (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created Nominee by clicking on 'Edit' button from saved Nominee in 'Employee Nominee Details (s)' table.

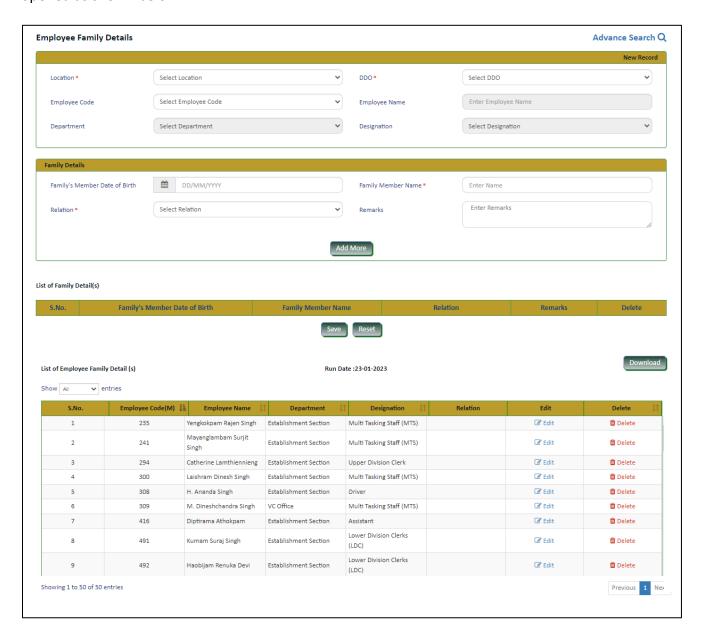




13. Employee Family Details:

Using this page, Authorized user can create & manage family details for employee created under 'Create and Manage Employee' page and whose left status is marked as 'NO'.

• Click on 'Employee Family Details' menu link, under 'Common Master' sub menu, then page will be opened as shown below:







- Enter data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Family Details (s)' table.
- On page load, it will display all saved Family Details in 'List of Employee Family Details (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created Nominee by clicking on 'Edit' button from saved cities in 'Employee Family Details (s)' table.



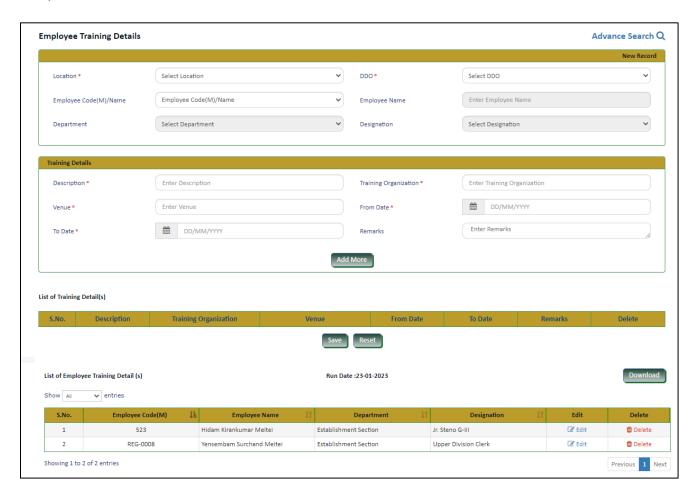




14. Employee Training Details:

Using this page, Authorized user can create & manage training details for employee (created under 'Create and Manage Employee' page) whose left status is marked as 'NO' from 'Create & Manage Employee' page.

• Click on 'Employee Training Details' menu link, under 'Common Masters' sub menu, then page will be opened as shown below:



⇒ Steps to Create New Record:

- Enter the data in all mandatory fields.
- Click on 'Save' button, then system will display message as 'Record Saved Successfully!' and record will get added in 'List of Employee Training Details (s)' table.
- On page load, it will display all saved Training Details in 'List of Employee Training Details (s)' table.
- Click on 'Advance Search' link on right top of the page, it will open window to search any specific record.
- User can Edit/Update any created training details by clicking on 'Edit' button from saved training details in 'Employee Training Details (s)' table

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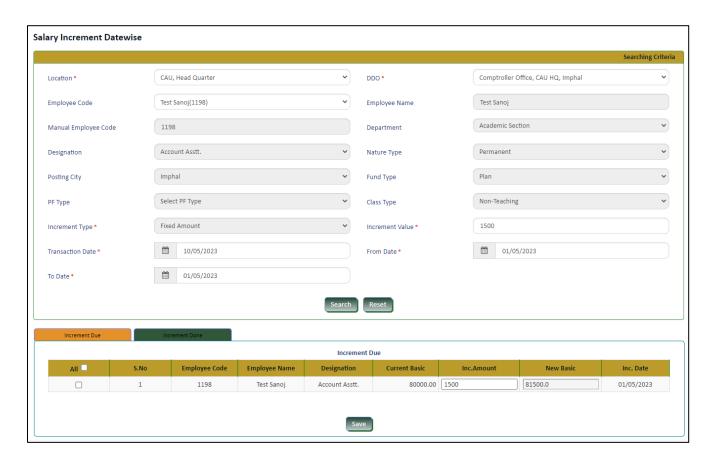


15. Salary Increment:

Using this page, Authorized user can manage salary revision/increment from this page and revised amount will be displayed on 'Create & Manage Employee' page.

User will be able to search the employees and make increment for selected employee; once increment is made then updated salary structure will be displayed on 'Create and Manage Employee page'.

• Click on 'Salary Increment' menu link, under 'Common Masters' sub menu, then page will be opened as shown below:



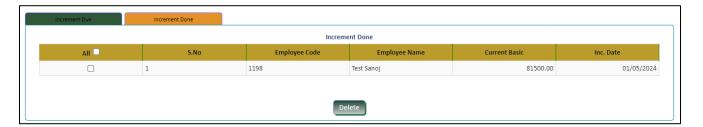
- Select value from 'Employee Code' drop down (as per selected value from Location & DDO, All the employee will be displayed whose left status is 'No' on 'Create & Manage Employee' page.
- User can also search the employee by selecting 'From Date' & 'To Date' (By 'From Date' & 'To Date' only those employees will be searched whose Increment due date exists in between).
- User can search the employee for making increment, by entering 'Transaction Date', 'From Date' & 'To Date'.
- Enter all the required credentials & click on the 'Search' button, employee will be searched and displayed under 'Increment Due' panel.



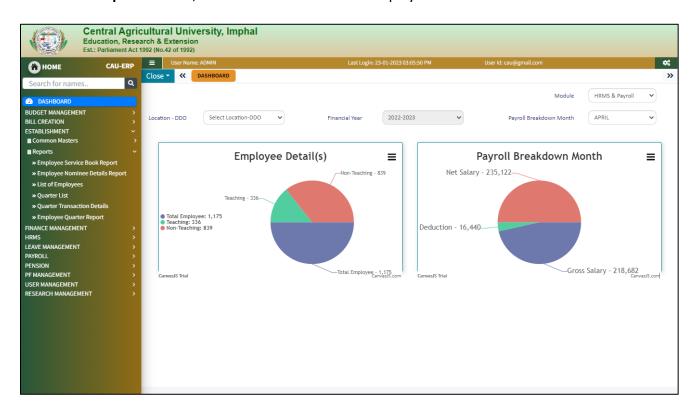


Note: Transaction Date will always current date.

• Select the employee by selecting 'All' check box and click on the 'Save' button, Increment made successfully & will be moved to 'Increment Done' panel. Increment will be calculated as per current 'Basic' and calculated amount will be considered as 'New Basic' amount only and it will be updated on 'Create & Manage Employee' page and page will be displayed as given below:



- Click on 'Save' button, then system will display message as 'Salary Increment Done Successfully!
- If created record(s) is in use in any other pages then it cannot be deleted.
- Click on 'Reports' menu, then sub menu list will be displayed as shown below:









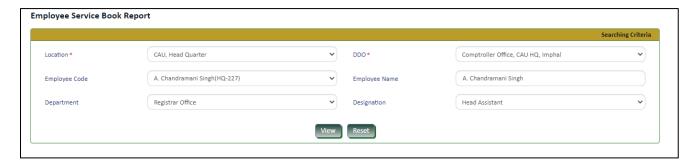
Reports

In this section, user can download the various reports like employee service book Report, employee nominee details Report, Quarter list, Quarter Transaction Details, and Employee Quarter Report etc.

1. Employee Service Book Report:

Using this page, Authorized user can view & download employee service book report.

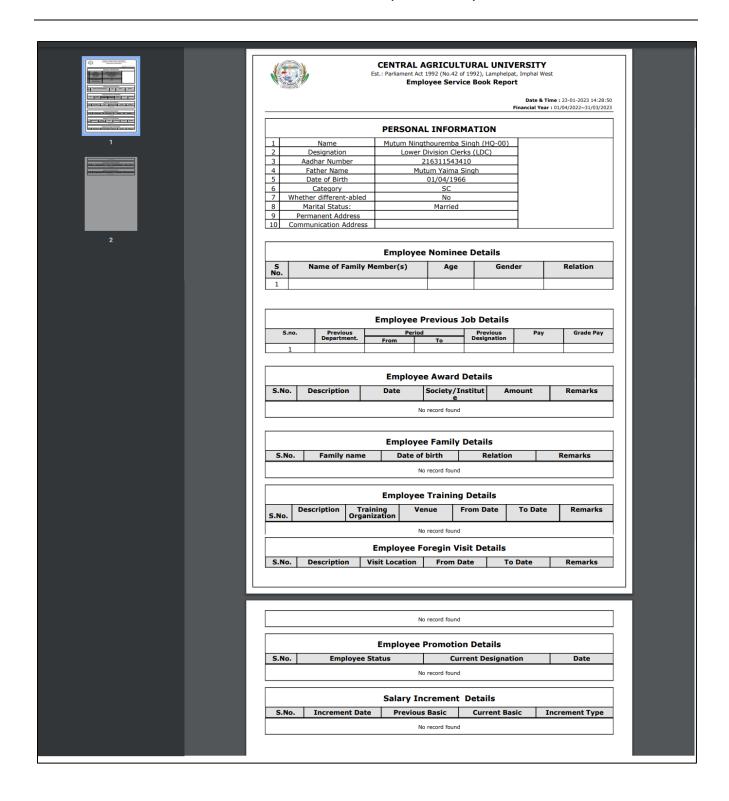
• Click on 'Employee Service Book Report' menu link, under 'Reports' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'View' button.
- Employee Service Book Report will be downloaded in PDF as given below:







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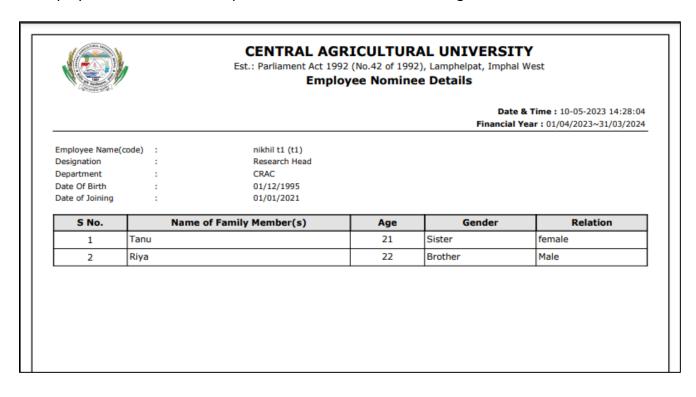
2. Employee Nominee Details Report:

Using this page, Authorized user can view & download employee nominee details report.

• Click on 'Employee Nominee Details Report' menu link, under 'Reports' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'View' button.
- Employee Nominee Details Report will be downloaded in PDF as given below:



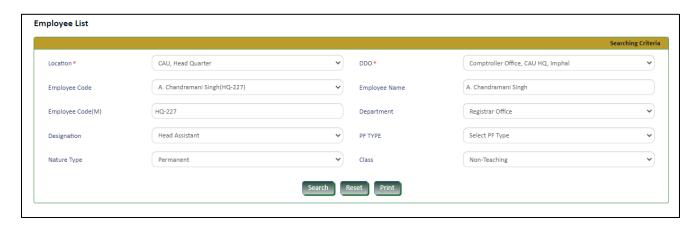




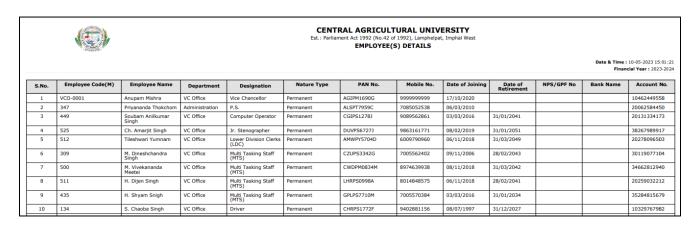
3. List of Employees:

Using this page, Authorized user can view & download employee details report (which has been created on 'Create & Manage Employee' page).

• Click on 'List of Employees' menu link, under 'Reports' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'Print' button.
- 'List of Employee' will be downloaded in PDF as given below:







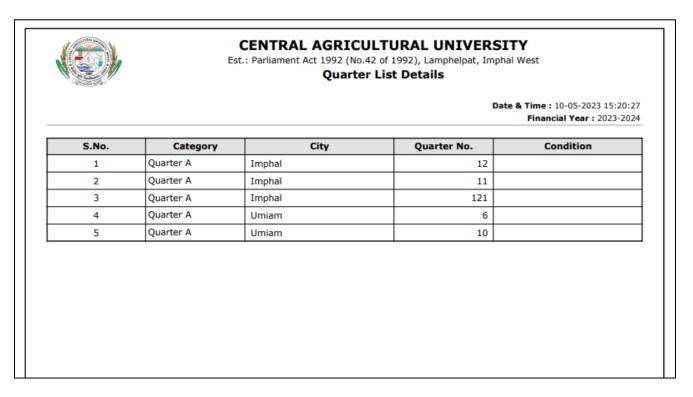
4. Quarter List:

Using this page, Authorized user can view & download available active quarter details report.

• Click on 'Quarter List' menu link, under 'Reports' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'Print' button.
- Quarter List will be downloaded in PDF as given below:



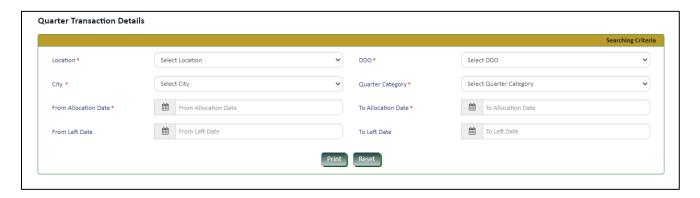




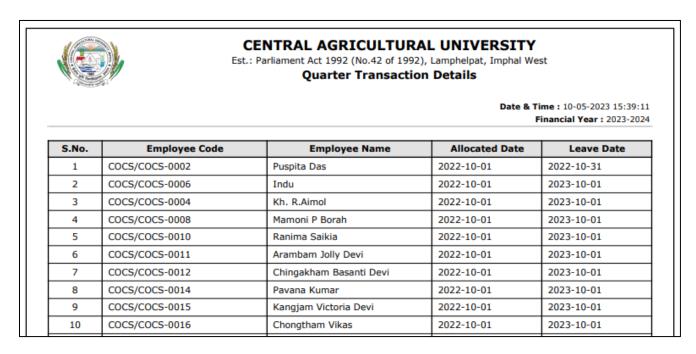
5. Quarter Transaction Details:

Using this page, Authorized user can view & download quarter allocation/left details report.

• Click on 'Quarter Transaction Details' menu link, under 'Reports' sub menu, then page will be opened as shown below:



- Enter data in all mandatory fields.
- Click on 'Print' button.
- Quarter Allocation Details will be downloaded in PDF as given below:



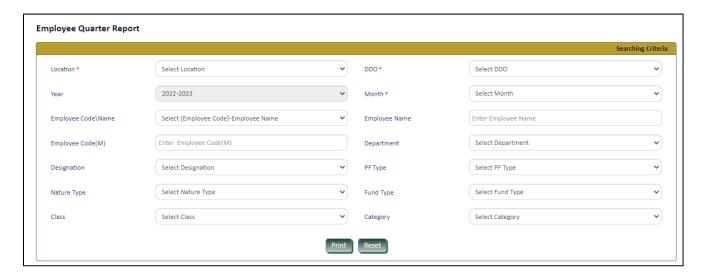




5. Employee Quarter Report:

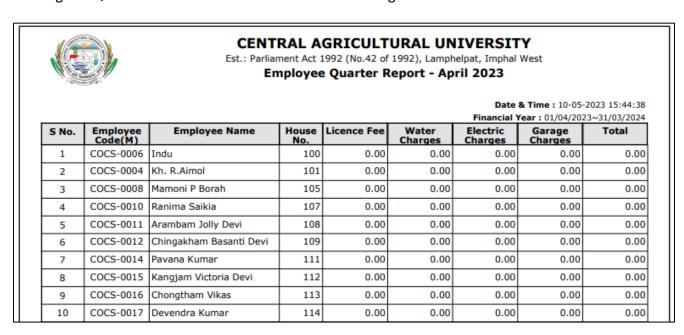
Using this page, Authorized user can view & download assigned quarter details report.

• Click on 'Employee Quarter Report' menu link, under 'Reports' sub menu, then page will be opened as shown below:



⇒ Steps to Download Report:

- Enter data in all mandatory fields.
- Click on 'Print' button.
- Assigned Quarter Details will be downloaded in PDF as given below:



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