The *editor* role on ComplyIndia portal reflects the responsibilities of an editor.

The editor profile handles all compliance activities for companies / locations that are assigned to him through the portal. The companies / locations are assigned to the editor through the *Company Setup* available through the super admin role.

Features available on the portal for the editor role are explained below.

1. Dashboard

The editor dashboard is the first menu on the editor home page. The screen has three sections.

Section 1 indicates key status information regarding the editors work – count of

* Pending registrations
* Upcoming events
* Completed activities
* Pending activities

Section 2 displays a *performance outlook*.The performance outlook is in the form of pie chart, which displays percentage of completed, delayed and pending activities. The editor can filter the performance outlook by company, location, business area, start date and end date (please note that the editor can handle activities of multiple companies at ComplyIndia).

Section 3 is the *News* section. In this section, news items entered by the super admin profile that are relevant to the editor (pertaining to acts of his company / location etc.,) are displayed. Latest news items appear at the top.

1. Activity List

The *Activity List* is the default option which is selected when the editor logs onto the ComplyIndia portal. This is the core of the application, through which the editor manages all activities pertaining to his allocated companies.

The editor dashboard has three sections.

Section 1 (Advance Filter) allows the editor to filter the list of his activities based on

* Company
* Location
* Month
* Year
* Status and
* Act name

Editor can view details of one company at a time. After the editor logs onto the portal, at any point of time, he can change the filter criteria above and display the new list of activities.

Section 2 (Password & Links) is like a scratch pad for the editor. While the editor is performing the compliance activities, it may be necessary for him to log onto government portals either to upload documents, view certain information etc., Each company handled by the editor will have different URLs, user name and password to log on and perform the specified activity. The editor can store these information here, so that it is faster and easier for him to carry out his work.

Section 3 (Activity Details) is where bulk of the editors time is consumed. This displays the list of activities according to the filter criteria selected in Section 1.

The activity details displays individual activities to be completed along with their due dates. The editor can enter the following details against each activity and save it to the portal

* Actual date of completion
* File upload onto the portal against the activity
* Remarks / reason for delay against the activity

Once an editor saves the above details onto the portal, the activity is recorded as complete on the portal. The editor can come back at a later date to review each activity, the date of their completion and any document uploads associated with that activity.

Sometimes, the activity list may be too lengthy, depending on the date values specified in the filter, and it is wise to filter against specific locations to limit the data set to a manageable one.

1. Reports

The reports menu has three options.

* Registrations pending
* Activities pending
* Monthly MIS

Information available on some of the reports are available through other options, but the reports menu provides the possibility of downloading the reports onto local laptop / desktop.

Registrations pending

It shows the list of company wise, location wise, act wise pending registrations that need to be completed. It includes both first time pending registrations and registrations whose validity has expired and hence require renewal. Editor can do it for all companies under his fold or a selected company.

Activities pending

Information in this report is already available on the Activity List. The editor can obtain a list of pending activities for a single company or all companies under his purview. Activities are deemed to be completed, if they have an actual date against them. Incomplete activities in the date range selected are displayed on the report.

Monthly MIS

Information in this report is already available on the Activity List. It can be observed, that the only additional field on the Activity List is the *File upload*. The Monthly MIS report allows the editor to get a report of the Activity List in an excel format. The only information missing in this is the File upload.

1. Certificates

The *Registrations pending* report displayed registrations that were not done or required renewal.

The Certificate menu option, has two sections.

Section 1 (Reports) is where the following filter criteria is entered.

* Company
* State
* Location

Section 2 (Registration completed) displays company wise, state wise, location wise, act wise registration details. In this section, scanned copy of the certificates are displayed under the column *View Registration Certificate*. This section only shows registration certificates that are valid – certificates which have no end date for validity or certificates that have a end date for validity which is in the future (greater than today). While no downloads are possible from this section, the editor can view the individual registration certificates – against specific company, state, location, act etc.,

1. Registers

The *Registers* section is created with the following purpose.

Every act has set of activities which may correspond to specific output report formats (kindly note that many activities will not have any associated report formats) i.e. the outputs which are generated as a result of those activities being performed, need to be produced in a format specified by the government for one of the following two reasons

* Stored internally by the customer or an agency appointed by the customer (in the ComplyIndia portal case, the portal stores the outputs on behalf of the customer)
* Submitted to the government department in that specified format (ComplyIndia folks may generate the report using *Registers* module and then upload the outputs onto government portals)

In the super admin module, the report format definitions against each act / activity combination are created and stored. For each report format that is customized, a mapping is created between a custom data input format created by ComplyIndia (Summary1, Summary2, Summary3, Summary4 and Summary5) and the report output desired. The specific contents in the summary sheets in terms of the fields going into each format were designed by the compliance team.

Through the *Registers* option, for every company the sheets (Summary1 through Summary5) of the formats required which contain the actual data to be processed, can be submitted. The month of processing needs to be specified and the data inside the worksheet should match with the submitted date.

Once a workbook is submitted for processing, it goes into a cron queue. Upon approval, those sheets that are entered here are processed in a batch job and based on the act configurations in the database, the output reports are generated and stored against the activities for the company for the specific month. The batch jobs run according to a prespecified frequency and the entry in the queue can be deleted before processing too.