Quick Hand out For EMD Managers

Employee Master Details (EMD) is an application in eOffice which helps building the organization structure and the employee data in the eOffice product. It is the backbone of the product that maintains the employee details which is used by various applications part of eOffice product suite.

The administration of the application or rather the employee data in the application is done by administrators at two levels -

1. **Super Administrator** – Administrator at the entire eOffice instance level (CBIC).
2. **EMD Manager** (also known as **Local Administrator**) – Administrator at the level of the respective organization / department, for example, CGST-ZONE-PANCHKULA.

The responsibility of the **Super Administrator** is, creation of master list of designations, posts etc. along with the creation of organizations/departments and their nominated user(s) as EMD Manager(s) respectively.

Whereas, the **EMD Manager is mainly responsible** for creating the organization units (list of Offices/Sections), employees, assigning employees post and etc. to get the end-user accounts created in eOffice.

This document takes us through the steps to be followed by an EMD manager to be able to create users in the system and assign roles in eOffice (i.e. functional accounts for working in 'File Management System).

Pre-requisites

1. Super Administrator must have created the account of the nominated EMD Manager.
2. Super Administrator must have provided privilege of 'Application Management System' to EMD Manager to be able to assign roles.
3. WebVPN or NIC Network to access eOffice.

Steps to Login in eOffice from network other than NIC Network (via WebVPN)

1. Open your browser, and visit '*saccess.nic.in'.*
2. Enter your official (nic/gov) email ID, in full, and password.
3. Click on **'eOffice CBIC'** link icon.
4. On the displayed page, choose the instance your wish to login.
5. On the **'Parichay'** login page, use your email ID credentials, in full, to login into eOffice.

Steps to login in eOffice from NIC network

1. Open your browser, and visit '*eoffice.cbic.gov.in*'.
2. On the displayed page, choose the instance your wish to login.
3. On the **'Parichay'** login page, use your email ID credentials to login into eOffice.

Steps to be followed by EMD Managers / Local Administrators

The following steps must be followed by the EMD Managers (also known as Local Administrator(s)) to create user accounts in the application & assign roles to the user with respect to the 'File Management System' application -

1. Go to 'Employee Master Details' Application

a) On the eOffice Home/Portal page, click on **'Employee Master Details'** application under eOffice Services.
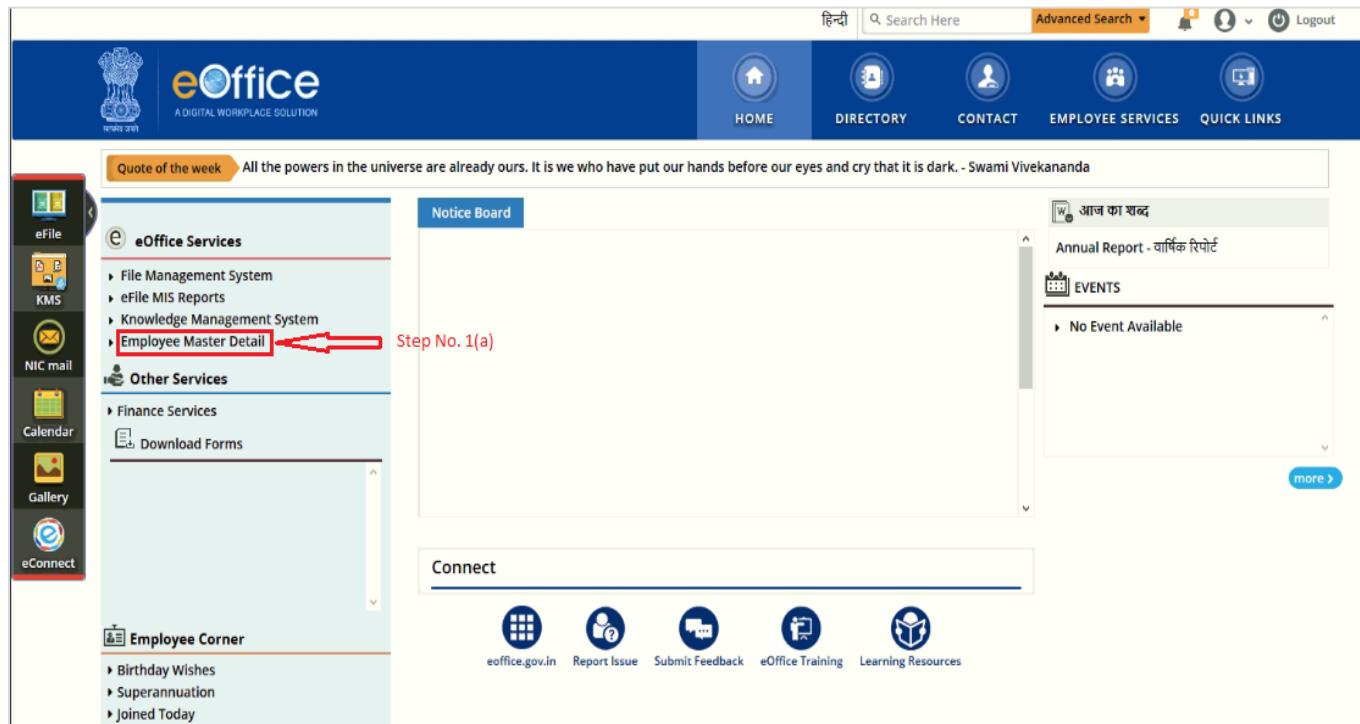
Figure 1

2. Entity Mapping for Global Organisation/Department

This section allows mapping of the entity created by the Super Administrator in your Global organization/Department.

Steps to Follow:

a) Under **'Creation & Mapping'**→ Click **'Organisation'**→**'Entity'**

b) From the 'General' list of entities, select the below mentioned entities and click on ' ▶ ' to move the selected entities to the 'Available to your Organization' list.

    i. **Department**
   ii. **OFFICE**
  iii. **SECTION**

Note*:* The **'Entity Type'** list that displays here are those entities that are created by Super Admin. It is mandatory to map **'Department'** and **'OFFICE'** entity for all offices and **'SECTION'** for all sections. The creation of any new entity by EMD Manager is not suggested and is only at the discretion of Super Administrator.
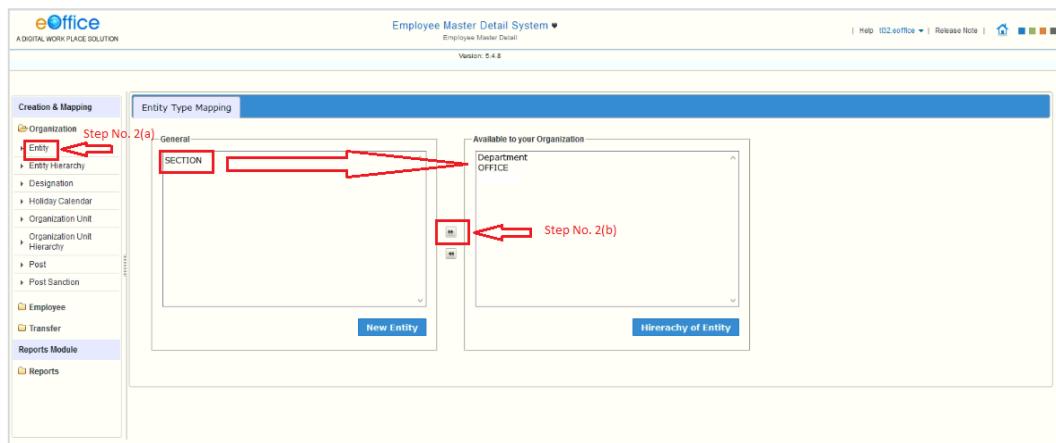
Figure 2

3. Defining the Entity Hierarchy for an Organisation

It allows the administrator to define the hierarchy of the entities of an organisation.

Steps to Follow:

    a) Under **'Creation & Mapping'** → Click **'Organisation'** → **'Entity Hierarchy'.**

    b) Choose **'Entity Type'** as **'Department'** and **'Parent Entity Type'** as **'Department'**.

    c) Tick **'Active'** check box and click on **'Save'**.

    d) Choose **'Entity Type'** as **'OFFICE'** and **'Parent Entity Type'** as **'Department'**.

    e) Tick **'Active'** check box and click on **'Save'**.

    f) Choose **'Entity Type'** as **'Section'** and **'Parent Entity Type'** as **'Office'**.

    g) Tick **'Active'** check box and click on **'Save'**.

Note: In case the hierarchy is set to wrong relation (i.e. other than mentioned above), use **'EDIT'** option to change its state to **'FALSE'** and refer steps above to **create the hierarchical relation only as defined above.**
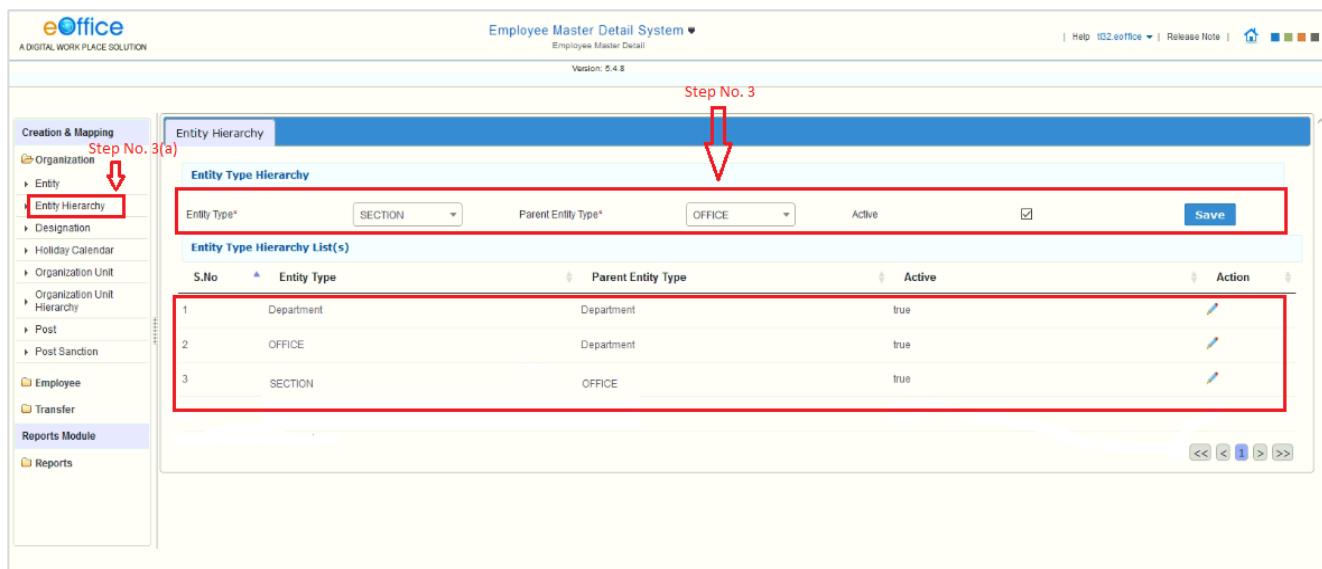

Figure 3

4. Mapping Designation(s)

This section allows mapping of the designations created by super administrator in your Global organization/Department.

Steps to Follow:

a) Under **'Creation & Mapping'**→ Click **'Organisation'**→**'Designation'.**

b) From the **'General'** list of designations, select the designations as required (refer to your **'Designation Master'** Sheet in the approved EMD data sheet) and click on ' ⏩ ' to move them to the **'Available to your Organization'** list.

<u>Note</u>: To maintain the standardized list of designation, **EMD Managers are not to create any designation**. If in case any designation is not available in the **'General'** list, then, under such circumstances, the respective **EMD Manager** should communicate the request for the same to the **Super Administrator**.
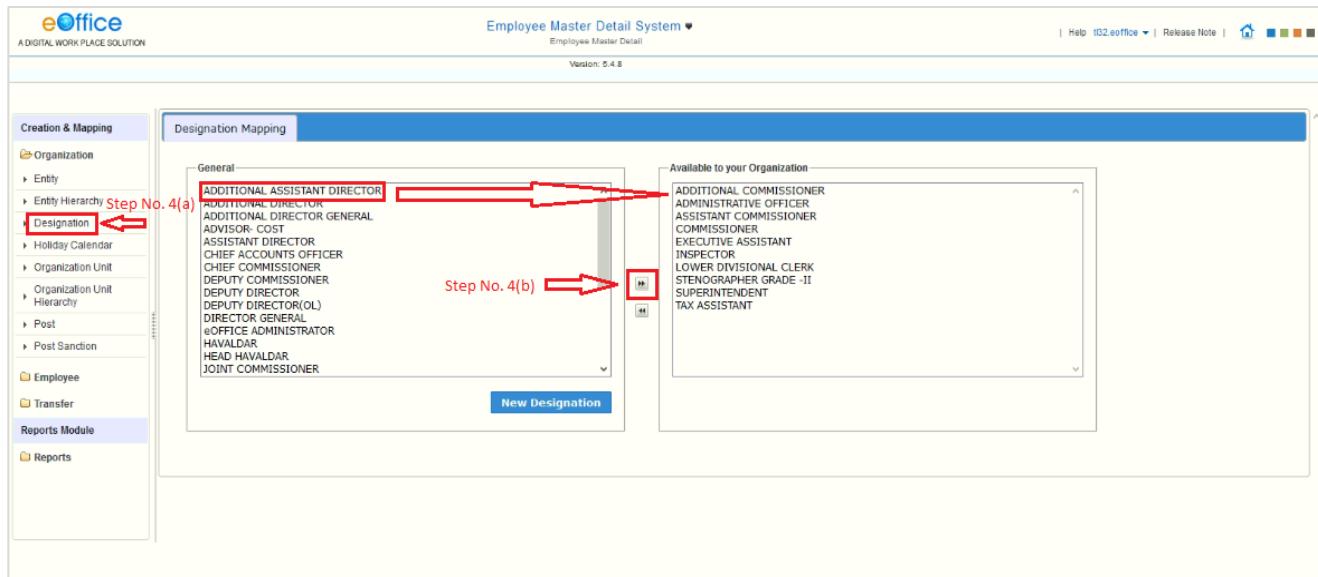
Figure 4

5. Creation of Organisation Unit(s)

This section allows creating all organization units (OUs) as maintained in the OU Master list of the Employee Master Details (EMD) sheet.

<u>IMPORTANT</u>:

a) The very first OU in the OU master list, is by the name of the Chief Commisionerate/Commissionerate/Directorate itself.

b) This OU should be created at first before creating others.

c) It is also called as **'Self OU'** because its parent OU is choosen as **'Self'**.

d) **This OU is should be already created by the Super Administrator for the EMD Manager.**

e) The EMD Manager may click on **'Show All'** to see the list of already created OU and cross-verify point **d)**.

f) While inserting the list of OUs in the application, always start from to first OU in the hierarchy.

Steps to Follow:

a) Under **'Creation & Mapping'**→ Click **'Organisation'**→**'Organization Unit'**.

b) Click on **'Add Organization'**.

c) Enter the **'Organization Name'**, **'Organization Code'**, **'Entity'** and **'Description'**.

d) Choose the **'Parent Organization Unit'**.

e) Click on **'Save'**.
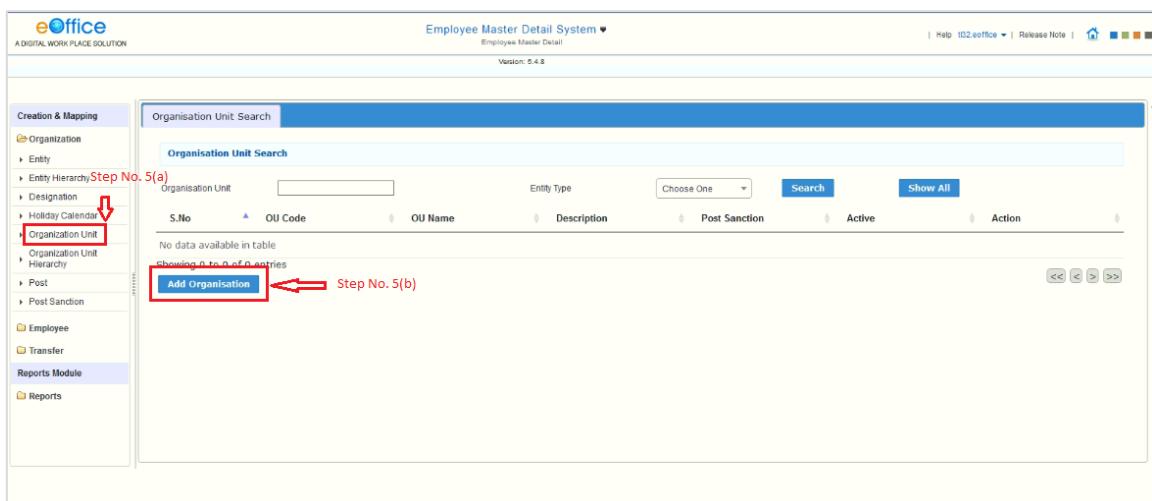
Figure 5
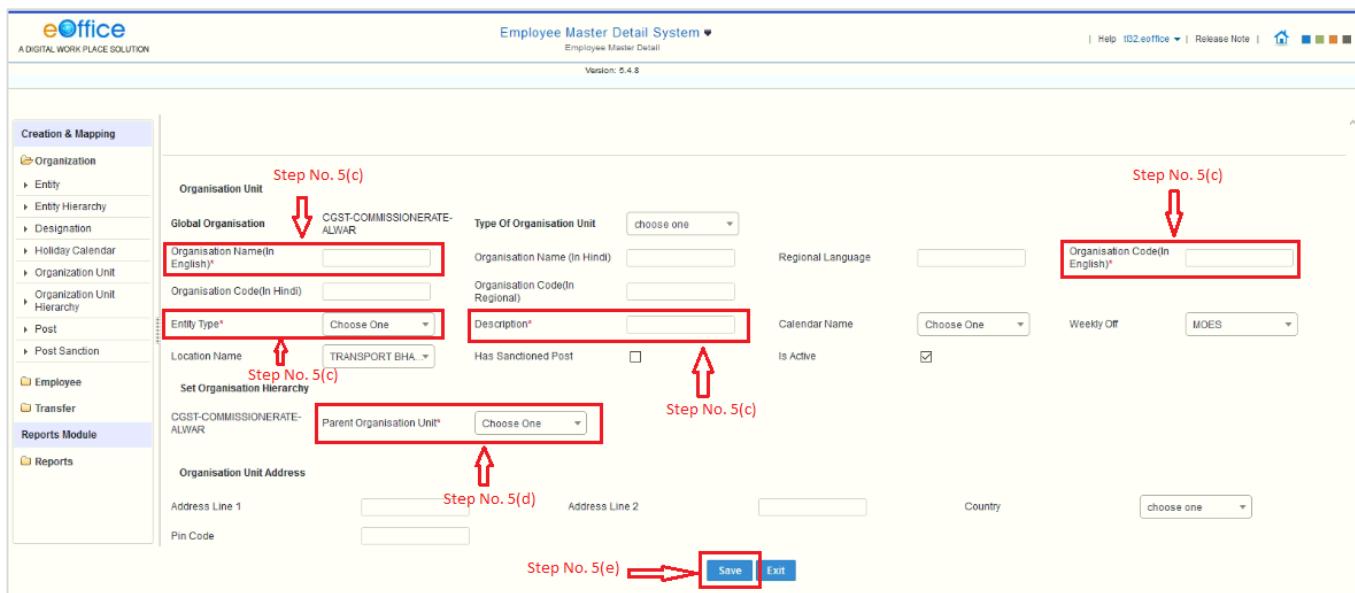
Figure 6

Other Actions (If required)

Searching an Organisation Unit	Editing an Organisation Unit	Viewing Organisation Unit Hierarchy
Under 'Creation & Mapping' → Click 'Organisation'		
Click **'Organisation Unit'** ⬇ Search an organisation unit by **'Organisation Name'/'Entity Type'** ⬇ Click **'Search'**	Click **'Organisation Unit'** ⬇ Search an organisation unit by **'Organisation Name'/'Entity Type'** ⬇ Click **'Search'** ⬇ Go to **'Actions'** ⬇ Click ' 🖉 '	Select **'Organisation Unit Hierarchy'** ⬇ Choose **'Parent Organisation Unit'** ⬇ Select from Action (**'Hierarchy'/'Post Details'**)

6. Post Mapping

This section allows mapping the designation created by super administrator in your Global organization/Department.

Steps to Follow:

a) Under **'Creation & Mapping'** → Click **'Organisation'**→**'Post'**.

b) From the **'General'** list of posts, select the posts as required (refer to your **'Post Master'** Sheet in the approved EMD data sheet) and click on ' ▶ ' to move them to the **'Available to your Organization'** list.

Note: To maintain the standardized list of post, **EMD Managers are not to create any post**. If in case any post is not available in the **'General'** list, then, under such circumstances, the **EMD Manager** should communicate the request for the same to the **Super Administrator**.

Figure 7

7. Creation of an employee/user account profile

This section allows the creation of a user's profile in the application and assigning a designation to the user.

Steps to Follow:

a) Under **'Creation & Mapping'** → Click on **'Employee'** module→Click on **'Employee'** option.

b) Click on **'New Employee'**.

c) In the pop-up box choose **'Complete Information'**. (**Note**- It is not recommended to go for **'Basic Information'**. Entering on the basic information will not suffice the purpose of getting user on-board since all required fields are not recorded in the **'Basic Information'** section.)

d) In the displayed screen, enter the following details (refer to your EMD Sheet for employee details)-

    i. Name

    ii. Employee Code

    iii. DOB

    iv. Gender

    v. Appellation

e) Email ID

    (**Note** – **EMD Manager need not enter login ID**. It comes automatically when you click on any other

option. For example, if you enter email ID as, 'example@gov.in', the login ID as 'example' will be auto-inserted.)

   i. Choose **'Designation'**. (**Note** – In case the designation is not listed in the drop down-list, then either the designation is not mapped in step 3 above, or not available/created by Super administrator)
   ii. Click on **'Submit'**.

Other Actions –

➢ To view the users already created, click on **'Show All'**, or search by the **'Employee Name'**, **'Employee Code'**, **'Designation'**, **'Email'**,

➢ To edit the details of the employee, search the user as mentioned in the previous point and click on 🖉 ')
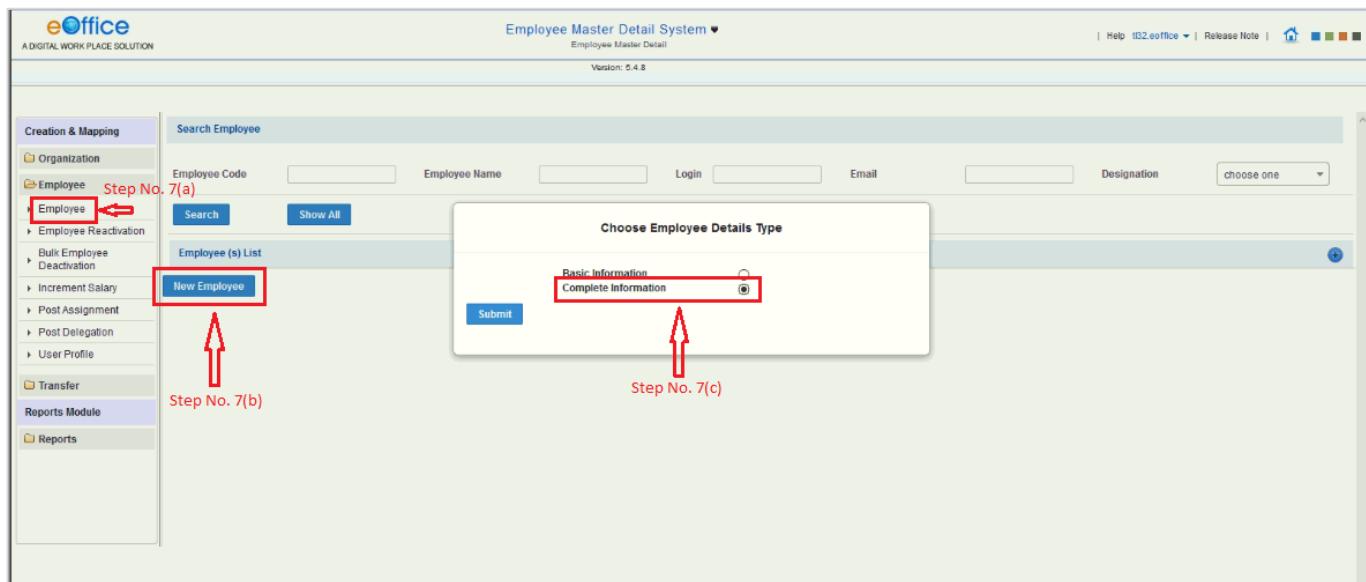
Figure 8

8. Post Assignment

This section allows to assigning post, Organization Unit (OU), marking abbreviation, post hierarchy and other important details to a user.

Steps to Follow:

a) Under **'Creation & Mapping'**→ Click on **'Employee'** module→ Click on **'Post Assignment'** option.

b) Search the employee by entering **'Employee Code'** or **'Employee Name'** details and click on **'Search'**.

c) In the displayed screen, enter the following employee details (refer to your EMD Sheet for employee details) –

   i.   Choose **'Post'** of the user. (Note – In case the post is not listed in the drop down-list, then either the designation is not mapped in step 5 above, or not available/created by Super administrator)
   ii. Enter **'Marking Abbreviation'** of the user.
   iii. Under **'Organization'** drop-down, choose **organization unit (OU)** the user belongs to.
   iv. OU Head – Select the check box, only in the case if the user to whom the post is being assigned in this step, is also the head of this OU as selected in **step iii)** above.
   v.   Primary – This option is to be selected if the post selected in **step i)** above is the primary charge of the user. (**Note –** Every user will have one primary charge/post, mandatorily. For Additional charge this is not to be selected.)

d) Click on **'Save'**.

e) In the displayed screen, enter the user's reporting officer details (OU name, Marking Abbreviated and Reporting Officer Name). [This option establishes employee hierarchy to its reporting officer]

Figure 9

ADDITIONAL POST ASSIGNMENT

This section describes the steps to add an additional post / charge in case the individual hosts multiple charges.

Steps to Follow: *(Refer figure 10 and figure 11)*

a) Follow Point 8. a) And b), mentioned above.

b) Click on the ➕ icon (sanction another post).

c) In the new inserted row, enter details as mentioned in point 8.c) above and click on **'Save'**.

d) In the displayed screen, enter the user's reporting officer details (OU name, Marking Abbreviated and Reporting Officer Name). [This option establishes employee hierarchy to its reporting officer]

Note:

➢ Additional charge can only be assigned only if the primary charge is pre-assigned.

➢ EMD Manager can only assign an additional charge of a post within in the same Commissionerate / Directorate, i.e. from one OU to another but within in the same Commissionerate / Directorate.

➢ If a user has an additional charge of a post of other **'Global Department'**, for example, if a Commissioner has an additional charge of any other Commissionerate also, then under such scenario, then additional post can only be assigned by the **'Super Administrator'**.

Figure 10

Figure 11

9. Assigning Roles

This section describes the steps to assign roles to a user with respect to the application (such as 'File Management System').

Steps to Follow:
a) Go eOffice Portal/Home Screen. (*Figure 12)*.
b) Click on **'Admin'** Section (available by clicking on the **'down arrow'** at the top right corner, right before the **'logout'** option.)
c) In the displayed screen, click on **'Application Management System'** to expand the sub-menus.
d) In the listed sub-menus, click on **'Application Post Role'**.
e) Click on **'Add Role'.**
f) In the displayed screen, choose the following (In order as listed below) –
    i. **Application Name** – 'eFile'
    ii. **Global Org Name** – Your own Commisionerate/Directorate (Global Organization) name.
    iii. **Post** – Select the post of the employee to which you wish to assign role.
    iv. **Employee Name** – Choose the name of the employee.

v.   **Status** – 'True' (to assign the roles)

vi. **Move the required roles** from the General list of roles available on the right, to the left box to assign. (**Note**-List of roles on the left box are the roles assigned/to be assigned to the user. And the roles available on the right box are the general list of all roles available)

Figure 12

Figure 13

Figure 14

Figure 15

IMPORTANT NOTE

1. For users to be able to create eFiles in the **'File management System'**, the list of File codes is to be entered in the application by the Super Administrator.

2. The file codes are entered against each **'Organization Unit'** name.

3. Hence, **Super Administrator** can only enter the list of File Codes against OUs, once the **EMD Manager** has created all OUs.

4. Once the EMD Manager has created all OUs, he/she must communicate the same to the **Super Administrator** for further population of **File Heads** in the application.