PIMS

Personnel Information Management System 3.0
Quick Start Guide (eOffice Usage, EMD Manager)

NIC-EOF-PIMS-QS-001

e**Office**
A DIGITAL WORK PLACE SOLUTION

सत्यमेव जयते

Amendment History

S. No.	Date	Application Version	Author	Amendments
1.	22 April 2021	3.0	eOffice Project Division	

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About

Personnel Information Management System (PIMS) v3.0 application has been developed for eFile v7.0 aims at storing data at the global level in any organization. The data is stored at the central level that can be accessed by all the applications of eOffice.

The interface allows the EMD Manager to create/update other employee's account and also to create/update the Post mapping with the Organisation Unit. EMD Manager has two roles.

1. **Admin Creator:** It creates/updates the employee account.
   a) Creation of Employee Account.
   b) Update details of an Employee Account.
   c) Direct Transfer of Employee Account.
   d) Employee to Organization Unit Mapping for an additional charge.

2. **Post Admin:** It creates/updates the Post mapping with the Organisation Unit.
   a) Creation of Organization Unit and its hierarchy.
   b) Creation of Root OU (Organization Unit).
   c) Organization Unit Structure (Complete Structure).
   d) Creation of Org Post Mapping and its hierarchy.
   e) Root PD (Post Details).
   f) Post Detail Structure (Complete Structure).
   g) Employee to Org Post Mapping (Assignment / De-assignment).
   h) Post Delegation (Assignment / De-assignment).

However, Admin Creator and Post Admin roles can be assigned to the same or different person based on requirements from the department. Roles can be switched from the options available under the username.

I. Admin Creator:

It deals with the data related to an Employee. Creates Employee Account and updates data related to personal details and service details.

a. Creation of Employee Account:

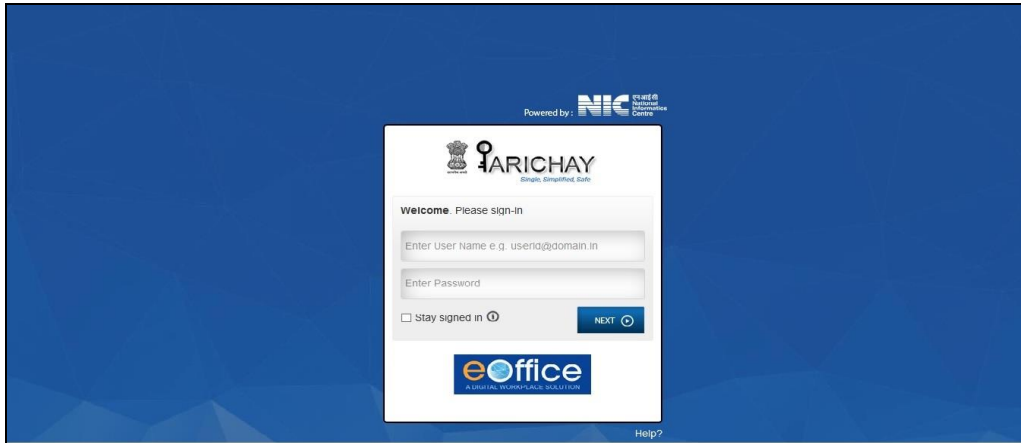1. Login to eOffice Portal with the NIC Email Credentials **(Fig.1)**.

Fig.1

2. Click the **Personnel Information Management System** (PIMS) link from the eOffice Portal Home Page left side menu **(Fig.2)**.
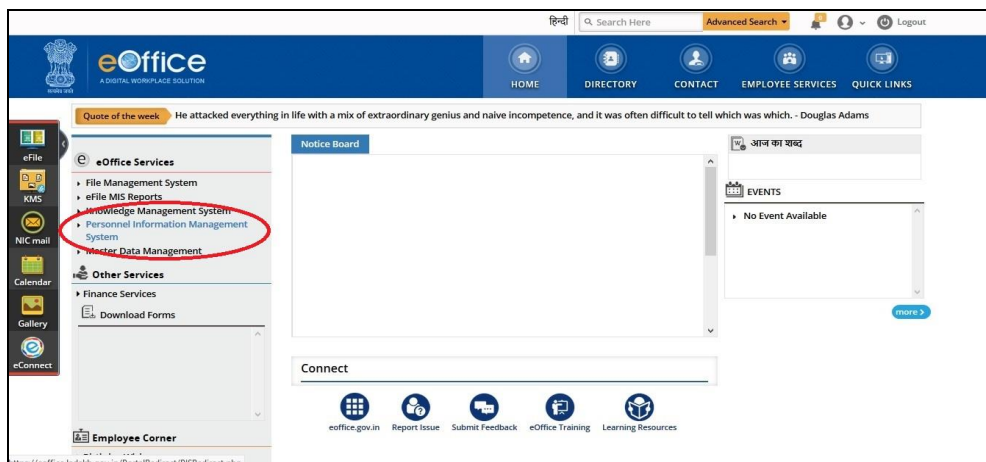

Fig.2

3. Click the **Employee Name** at top right corner to switch role, select **ADMIN CREATOR (Fig.3)**.
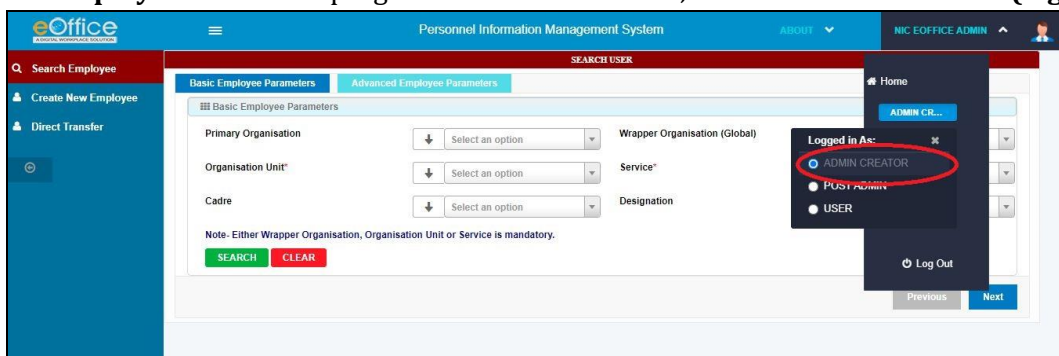

Fig.3

4. Click **Create New Employee** tab from the left side menu for Employee Account creation.

5. Fill in all the mandatory and required fields' data, section-wise. i.e. Login Details, Designation Details and Organisation / Service Details. Then Click **NEXT** button **(Fig.4)**.

Fig.4

6. Fill in all the mandatory and required fields' section-wise in Organisation /Service details. Then click the **NEXT** button **(Fig.5)**.

Fig.5

7. Fill in all the mandatory and required fields' section-wise in Designation details.

8. Click **Create User** button **(Fig.6)** to create the account in the Application.

Fig.6

b. Update details of an Employee Account:

1. Click **Search Employee** tab **(Fig.7)** from the left side menu for Employee Account search.

Fig.7

2. Search the concerned **Employee Account** with the filter of **Primary Organisation, Wrapper (Global) Organisation** or **Organisation Unit** and click the **Search** button **(Fig.8)**.

Fig.8

3. Click the **arrow (→)** button under **Action** column **(Fig.9)**, the profile page of the Employee Account gets opened beside the Search User page.

Fig.9

4. By clicking the Profile page the details of Employee gets displayed **(Fig.10)**.

Fig.10

5. Click **Personal Info +** tab of the left side menu to open the personal details page wise **(Fig.11)**.
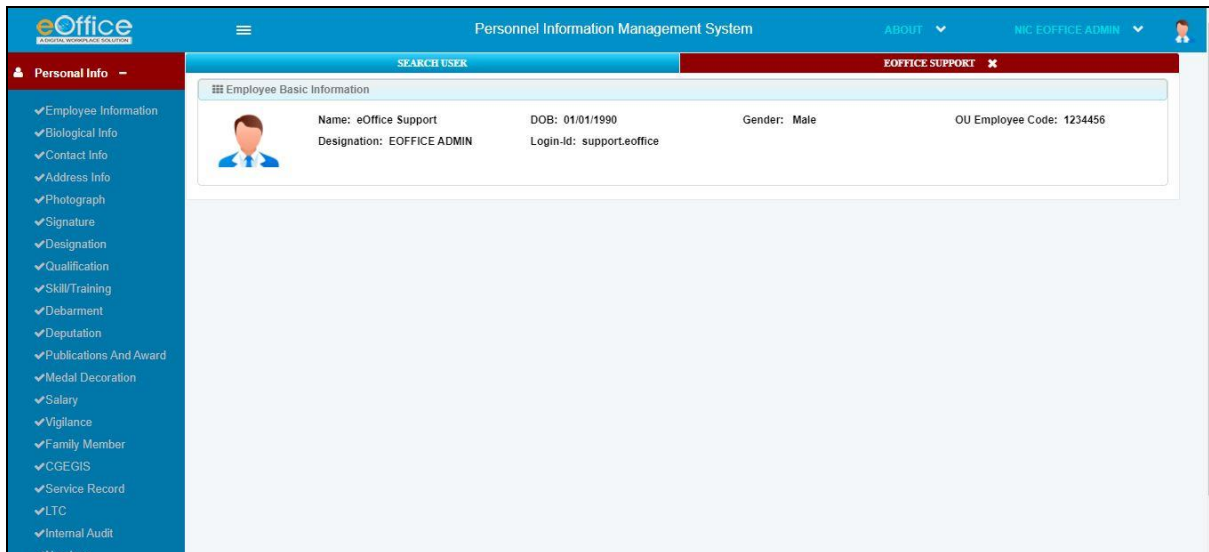

Fig.11

6. Click the required page to update required information. For eFile information in the following pages should be properly filled in:
   ➢ Employee Information
   ➢ Contact Info
   ➢ Designation
   ➢ Login ID

c. Direct Transfer of Employee Account:

When an Employee gets transferred from an **Organization** or **Organization Unit,** then the account of user needs to transfer from PIMS also. And before transfer, the users' account needs to be relieved from the mapped post. Please refer *Employee to Org Post Mapping De-Assignment* in page number 18

Following are the steps of Employee Account Transfer:

1. Click **Direct Transfer** tab of the left side menu for Employee Account search **(Fig.12)**.

Fig.12

2. Search the concerned **Employee Account** with the filter of **Primary Organisation, Wrapper (Global) Organisation,** or **Organisation Unit** and click the **Search** button **(Fig.13)**.
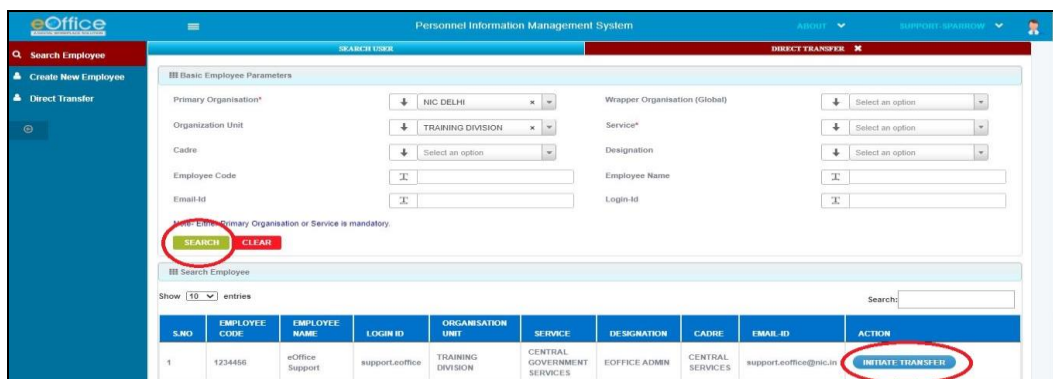
Fig.13

3. Click the **INITIATE TRANSFER** button under **Action** column, the transfer page gets opened in the pop-up window **(Fig.14)**.
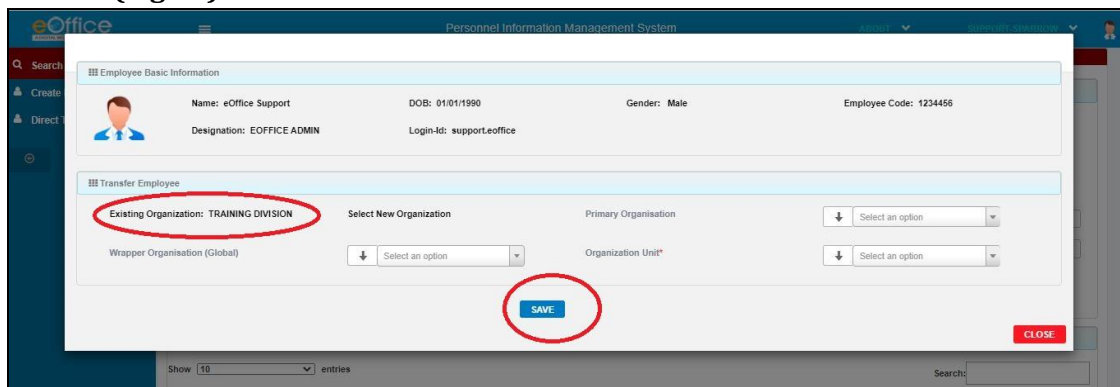
Fig.14

4. **The Existing Organization Unit** gets displayed. Selected New Organization Unit based on Primary and Wrapper Organization and click the **SAVE** button to transfer the Employee Account.

d. Employee to Organization Unit Mapping for additional charge:

When an employee gets an **additional charge (additional post)** for an **Organization Unit,** needs to map the unit with the Employee Account. So that it reflects in the unit for Post Assignment.

Following are the steps of Organization Unit Mapping:

1. Click the **Search Employee** tab of the left side menu for Employee Account search **(Fig.15)**.
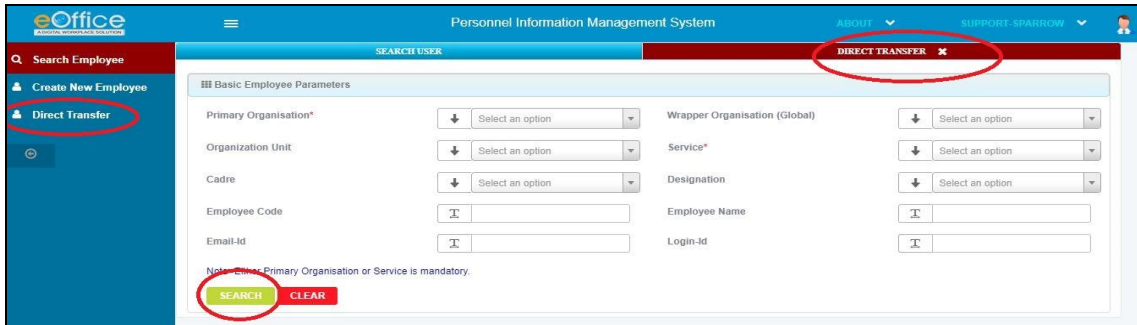

Fig.15

2. Search the concerned **Employee Account** with the filter of **Primary Organisation, Wrapper (Global) Organisation,** or **Organisation Unit,** and click the **Search** button **(Fig.16)**.
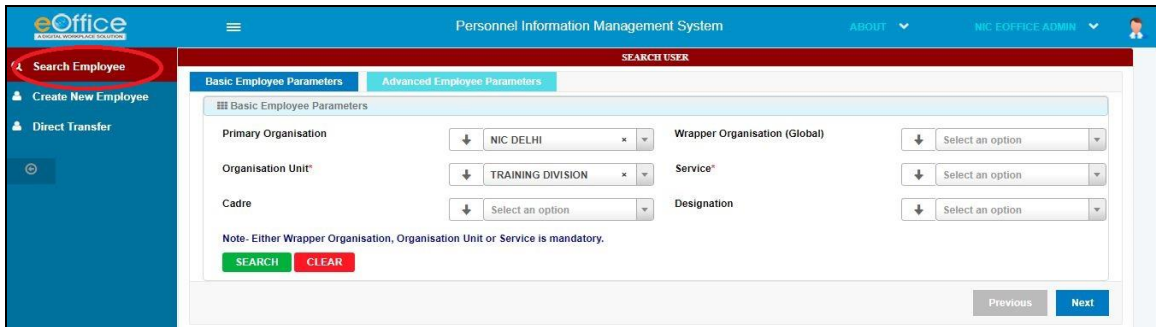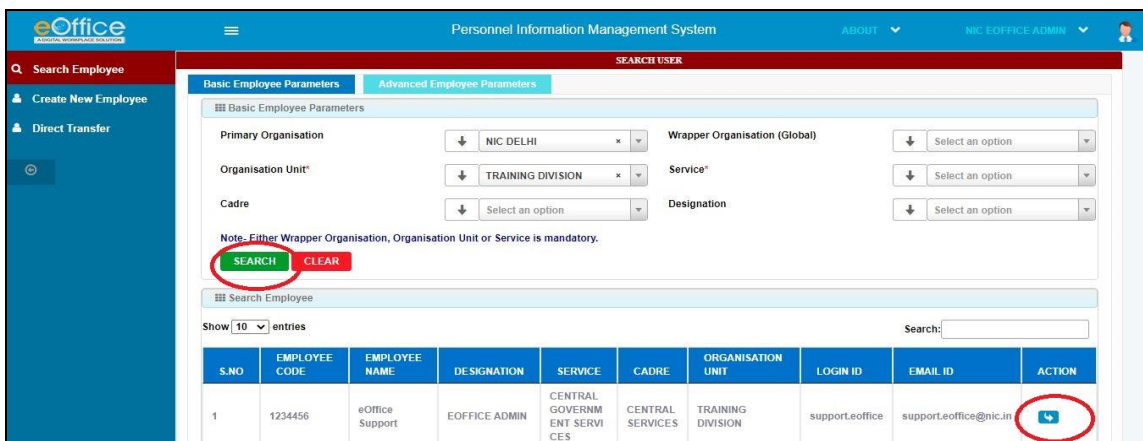

Fig.16

3. Click the **arrow (→)** button under the **Action** column **(Fig.17)**, the profile page of the Employee Account gets opened beside the search user page.
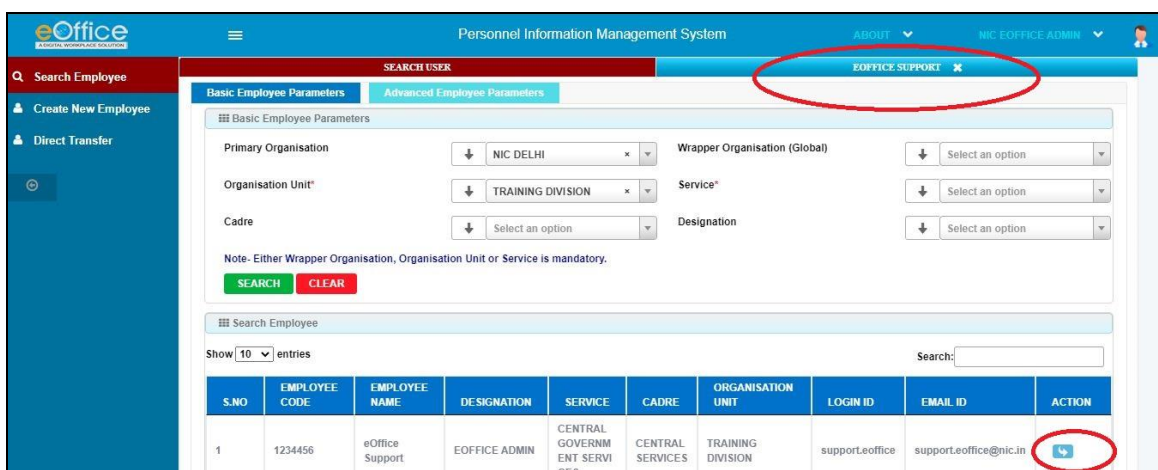

Fig.17

4. By clicking the profile page the details of Employee gets displayed **(Fig.18)**.

Fig.18

5. Click the **Personal Info +** tab of the left side menu to open the page-wise personal details **(Fig.19)**.

Fig.19

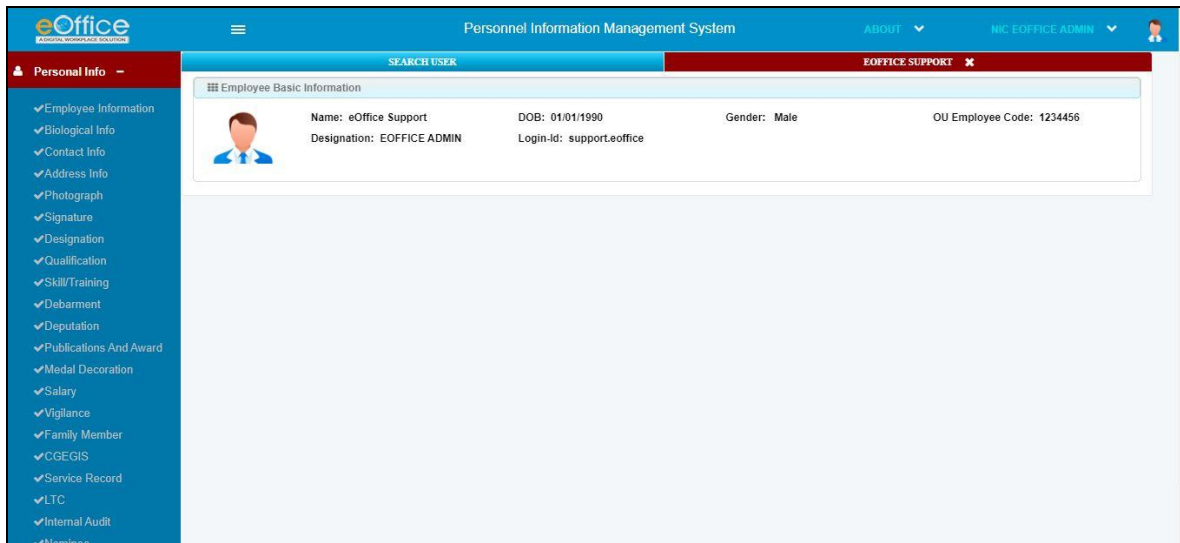6. Click the **OU Assignment /De-Assignment** page to map the desired **Organization Unit** with the selected **Employee Account**.

7. First, search the list of Organization Unit with filters of **Primary** and **Wrapper** Organization, then **move** the desired Organization Unit to the **right side** by clicking the (**>>**) button and then, click the **SAVE** button **(Fig.20)**.
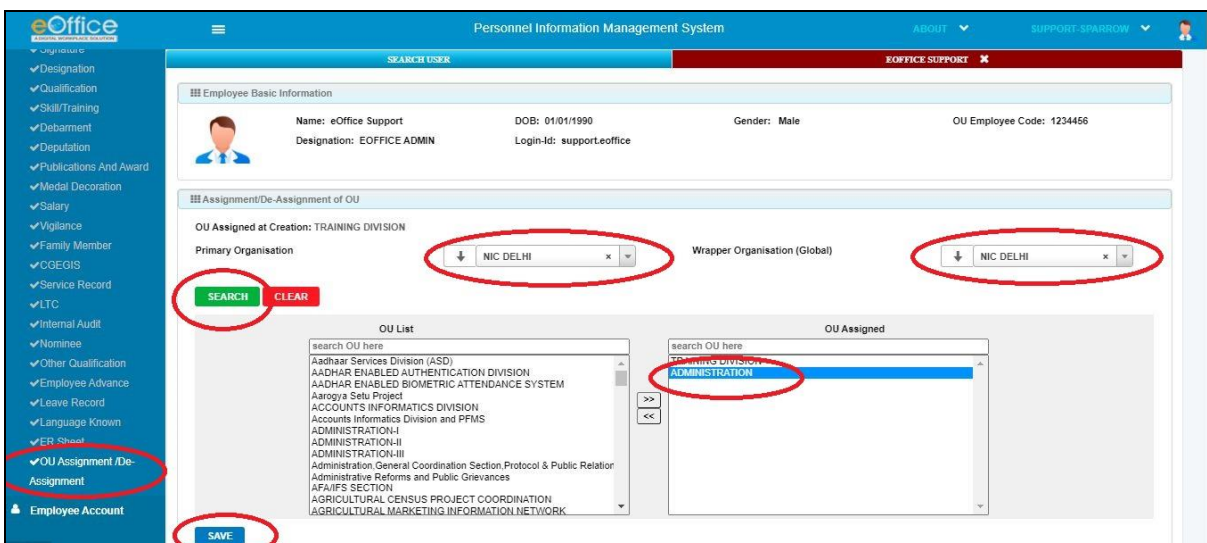

Fig.20

II. Post Admin:

It deals with the data related to Organization Units and Org Post mapping with their hierarchy.

a. Creation of Organization Unit and its hierarchy:

1. Click the **Employee Name** at the top right corner to switch roles, select **POST ADMIN (Fig.21)**.
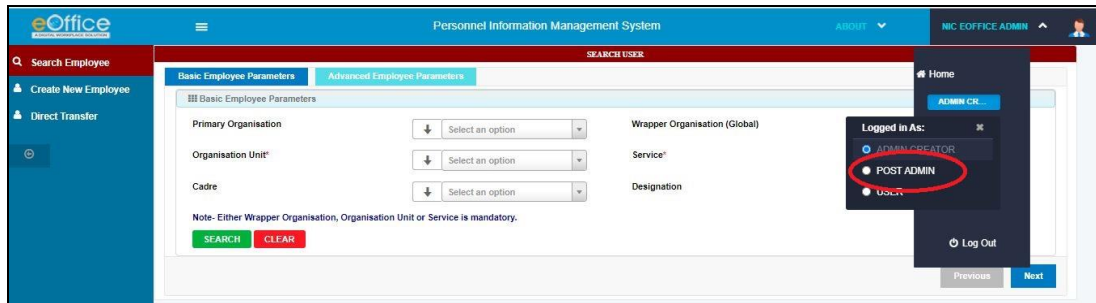

Fig.21

2. Click the **Org Structure** tab under **Organogram** of the left side menu to Search an already created Organisation Unit **(Fig.22)**.
3. **Org Structure** contains the list of Organization Units in a Global/Wrapper Organization.
4. Further, the hierarchy of the Organization Unit can also be viewed from the selected Organization Unit.
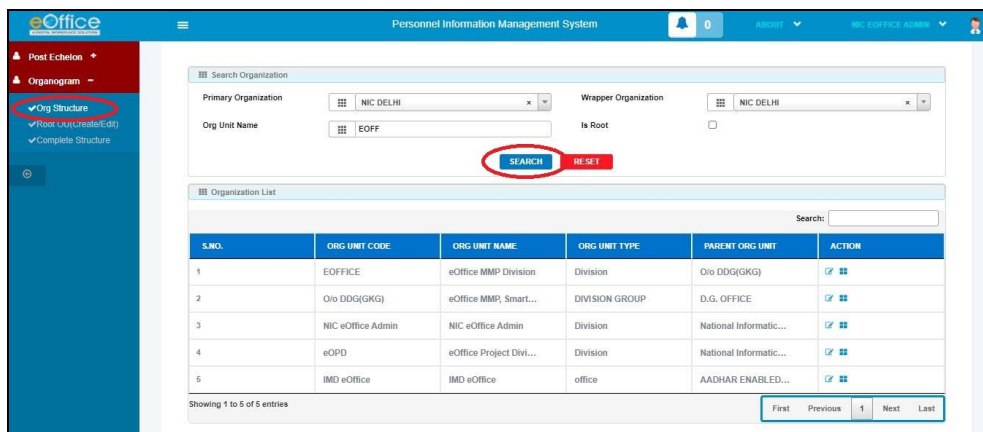

Fig.22

5. Click the **edit** button beside Organisation Unit under the **ACTION** column to update the Organisation Unit name and its details **(Fig.23)**.
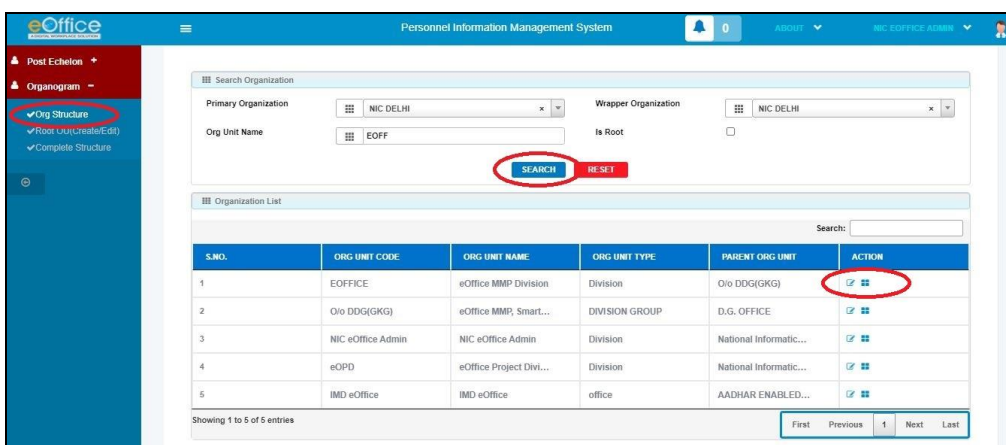

Fig.23

6. Click the **view Org Unit hierarchy** button beside Organisation Unit under **ACTION** column to view its hierarchy down the line or Create NEW Organisation Unit. To Create a NEW Organisation Unit, select the Parent Organisation Unit first.

7. Click the **Arrow (>)** button shows the child Organisation Unit(s) one level down the line. On the mouse-hovering above the rounded icon the option to Create **Child Organisation Unit** is displayed **(Fig.24)**.

Fig.24

8. By clicking the **Create Child** option, the form to create a New Organisation Unit gets opened under the selected Parent Organisation Unit.
9. Fill in the mandatory fields section-wise and click the **SAVE** button **(Fig.25)**. The First section of the form is mandatory.
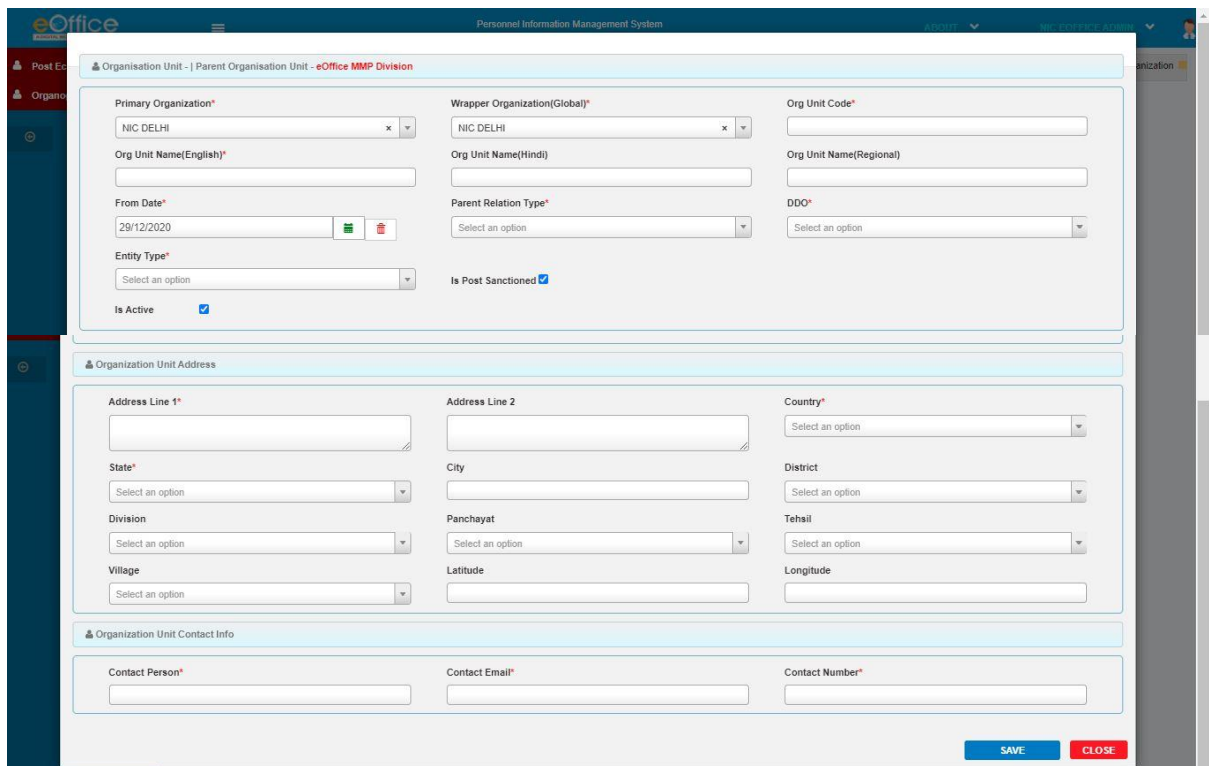

Fig.25

b. Root OU (Organization Unit):

It defines as the highest Organisation Unit in an Organisation from where the hierarchy starts. There can be multiple Wrapper (Global) Organisations in an eOffice instance but ideally, there should be only one root OU as the hierarchy needs to be maintained from the top Organisation Unit. It is generally created at the inception of a particular eOffice instance. Can be changed at a later stage but should be handled carefully.

1. Click the **Root OU (Create/Edit)** tab under Organogram of the left side menu to the checklist of Root OU **(Fig.26)**.

Fig.26

2. There is two action button under the Action Column:
   a. **Create Root Organisation Unit:** For a newly created Wrapper Organisation, there is a provision to create the first OU as a root OU from here. Once a root OU is created can be edited also.
   b. **Assign an existing Organisation Unit as Root:** If the OUs are already created in a Wrapper Organisation and the Root OU is not created yet then we can assign one of the OU as Root. Root OU can be de-assigned also if required.

c. Org Detail Tree:

It is the tree-like structure of Organization Units from the selected one for ease of understanding the hierarchy of Organization **(Fig.27)**.
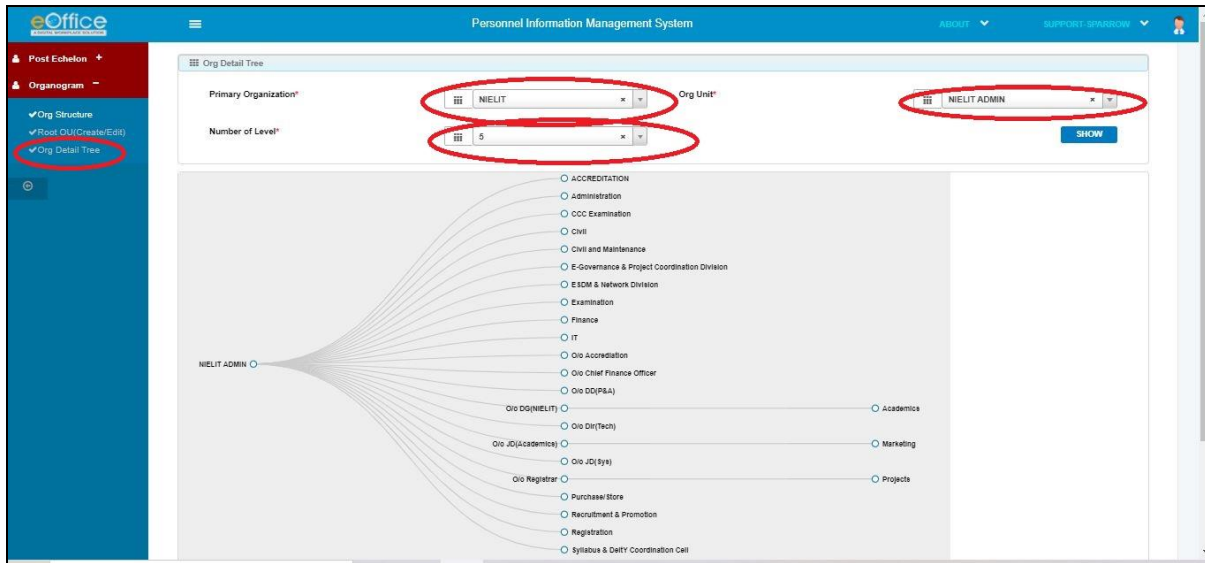

Fig.27

d. Creation of Org Post Mapping and its hierarchy:

1. Click the **Post Structure** tab under **Post Echelon** of the left side menu to Search an already created Org Post Mapping. **Post Structure** contains the list of Posts mapped with the Organization Units.
2. On selecting a particular post, the details of an employee mapped to that post are shown.
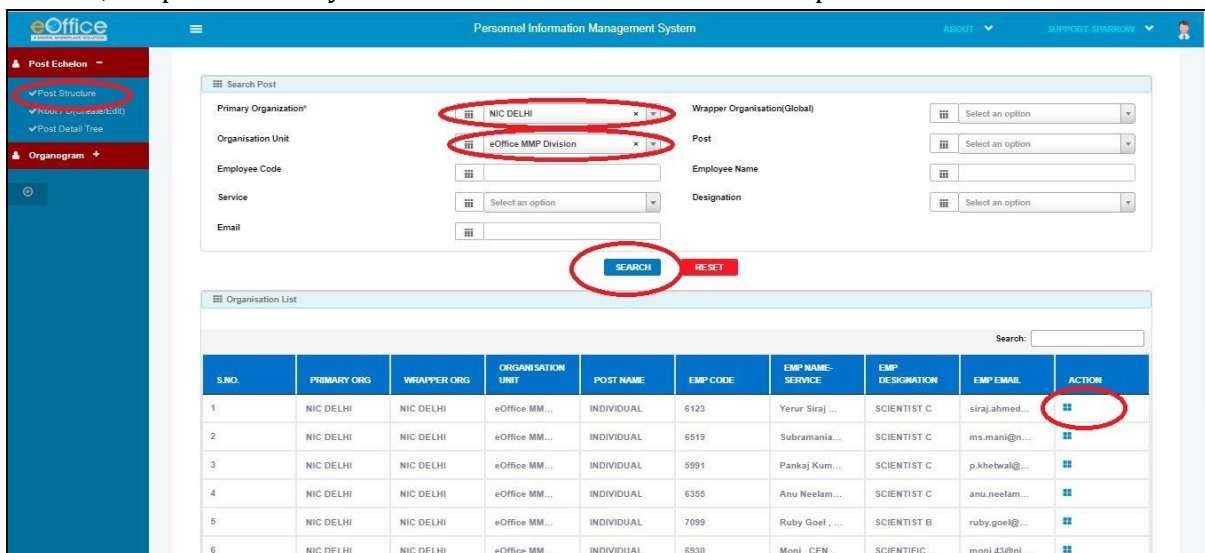3. Further, the post hierarchy can also be viewed from the selected post.

Fig.28

4. Click the **view Org Post Mapping** hierarchy button beside a particular Org Post Mapping under the ACTION column to view its hierarchy down the line or Create NEW Org Post Mapping. To Create a **NEW Org Post Mapping,** select the Parent Org Post Mapping first.

5. By clicking the **Arrow (>)** button shows the **child Org Post Mapping(s)** one level down the line. On the mouse hovering above the rounded icon the option to Create Child Org Post Mapping is displayed **(Fig.29)**.
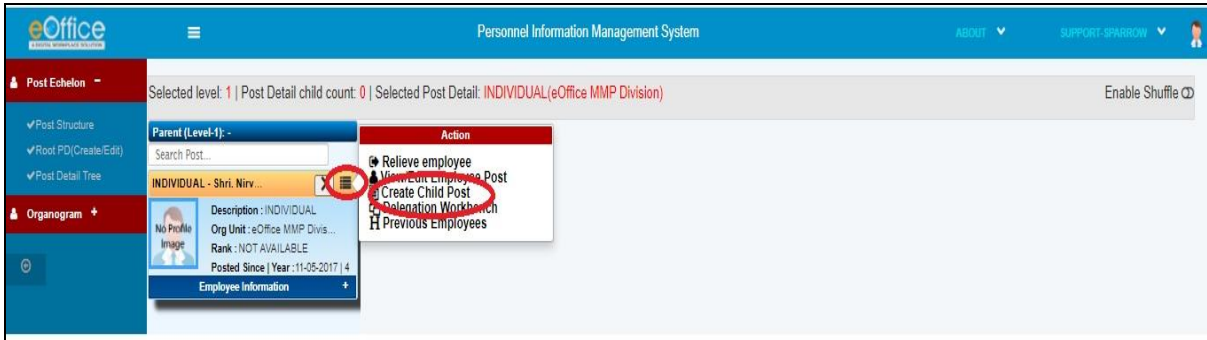
Fig.29

6. By clicking the **Create Child** option, the form to create a New Org Post Mapping gets opened under the selected Parent Org Post Mapping. Fill in the mandatory fields and click the **SAVE** button **(Fig.30)**.
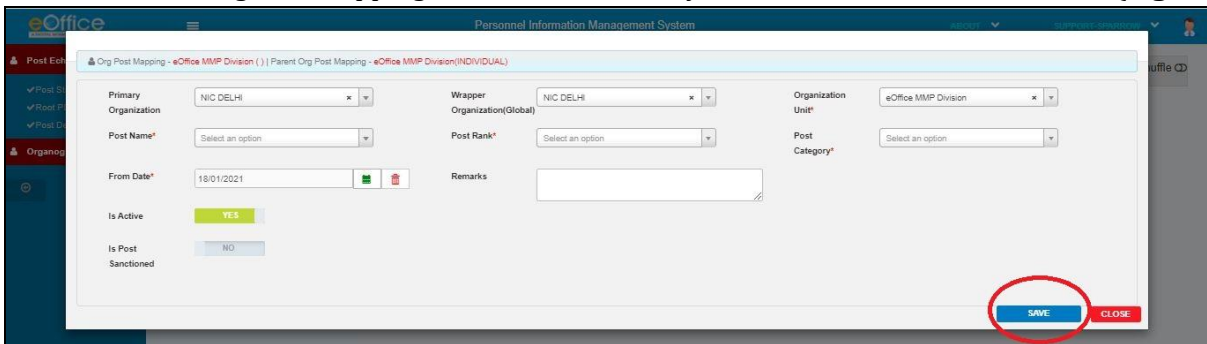
Fig.30

e. Employee to Org Post Mapping Assignment:

1. On Mouse-hovering on the **Action** button of the selected **Org Post mapping,** an option of **Assign Employee** is available to assign an employee if no one is assigned to it yet **(Fig.31)**.
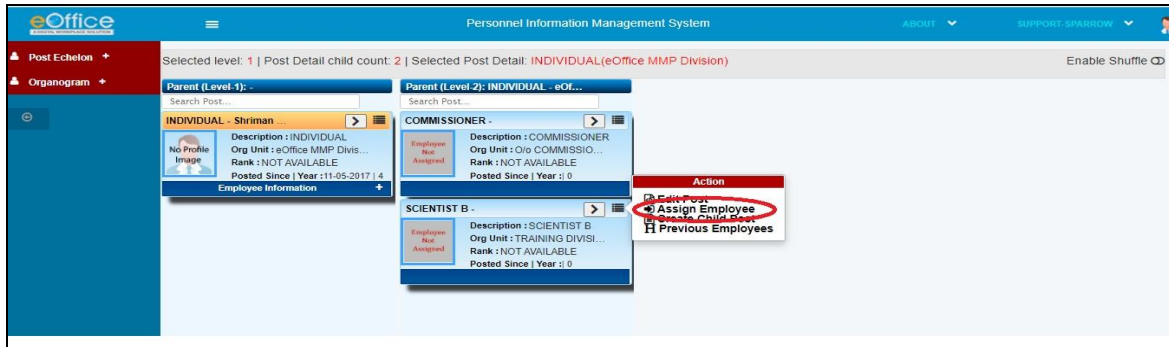
Fig.31

2. Search the concerned **Employee** with the filter of **Primary Organisation** or **Wrapper (Global) Organisation and Organisation Unit, etc (Fig.32)**.
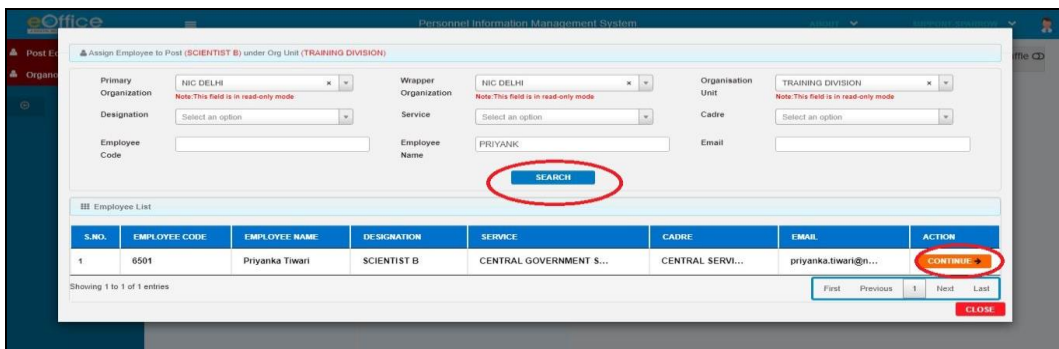
Fig.32

3. Click the **Continue** button **(Fig.32)** under the Action button for Employee Assignment to the particular **Org Post mapping**.

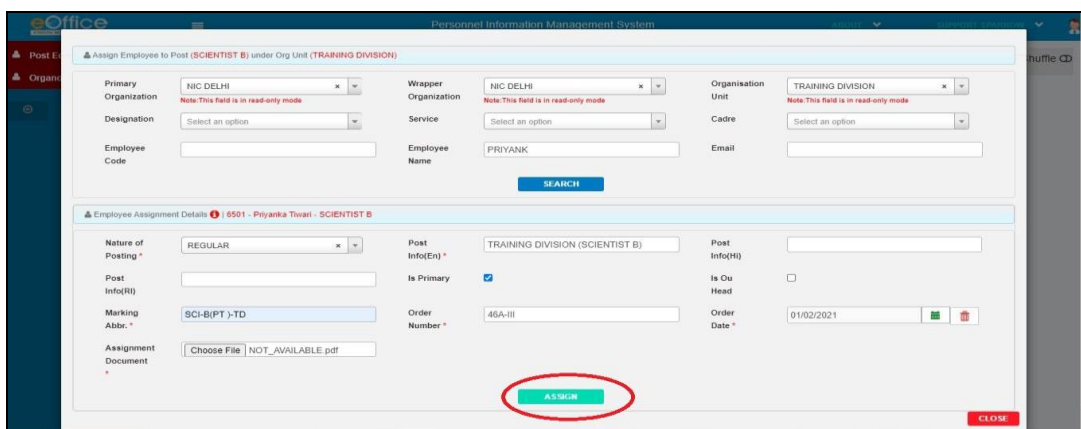4. Fill in the **Employee Assignment Details** and upload an order copy **(Fig.33)**.

Fig.33

5. Click the **Assign** button to assign an Employee to the **Org Post mapping (Fig.33)**.

f. Employee to Org Post Mapping De-Assignment:

1. On Mouse-hovering on the Action button of the selected **Org Post mapping,** an option of **Relieve Employee** is available for Employee De-Assignment from a particular **Org Post mapping** if an employee is already assigned to it **(Fig.34)**.
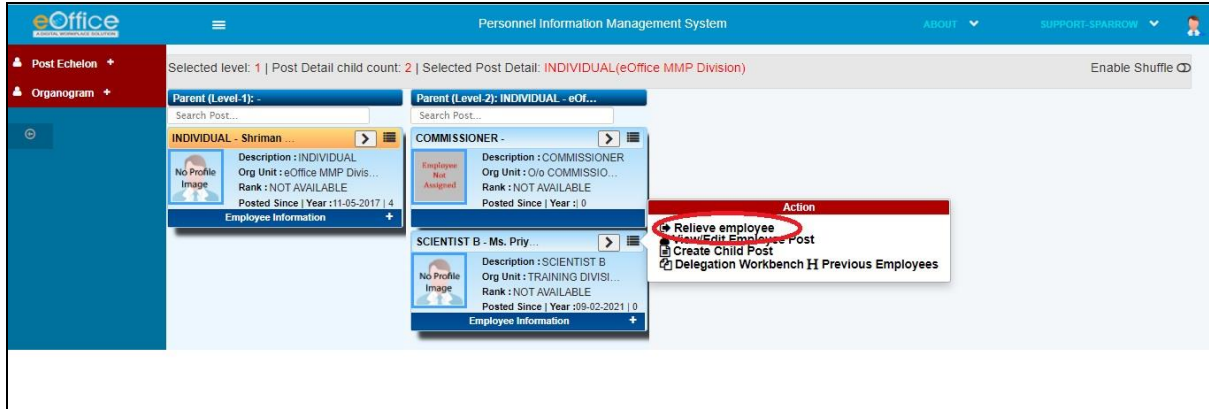

Fig.34

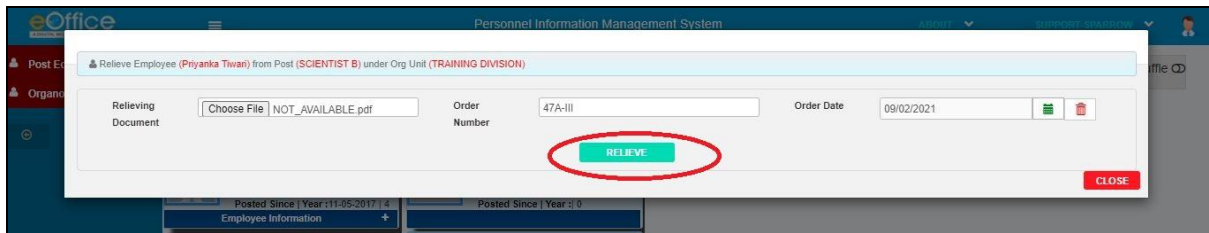2. Fill in the Relieving Information Details and upload an order copy **(Fig.35)**.

Fig.35

3. Click **Relieve** button **(Fig.35)** to relieve an Employee from the **Org Post mapping**.

g. Post Delegation Assignment / De-assignment:

1. On Mouse-hovering on the Action button of the selected **Org Post mapping,** an option of **Delegation Workbench** is available to assign/de-assign delegation for a particular **Org Post mapping** if an employee is already assigned to it **(Fig.36)**.
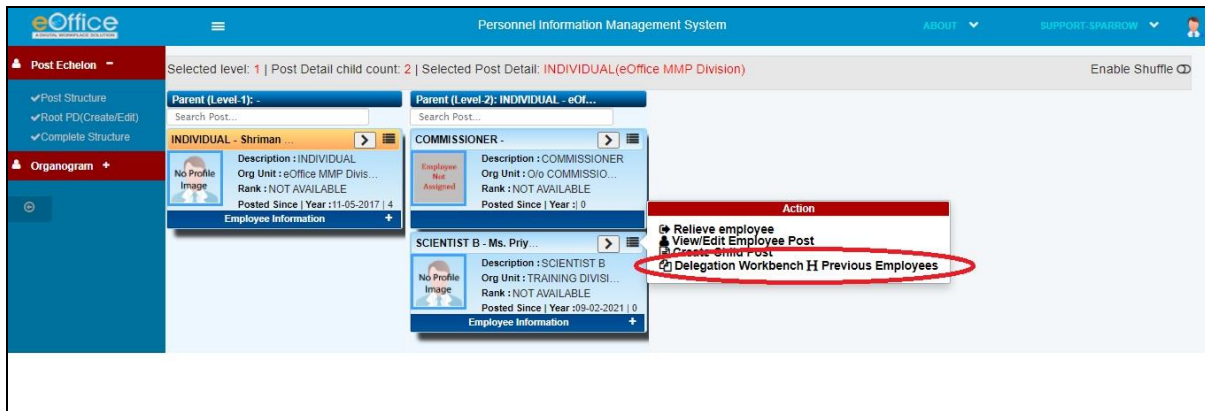

Fig.36

2. Click **Modify/De-Assign Delegated To** tab **(Fig.37)** to check whether delegation for this post is already active.
3. The **To Date** can be updated to increase the delegation period. And **Delegation** can be **de-assigned** from here also after completion of the delegation period.
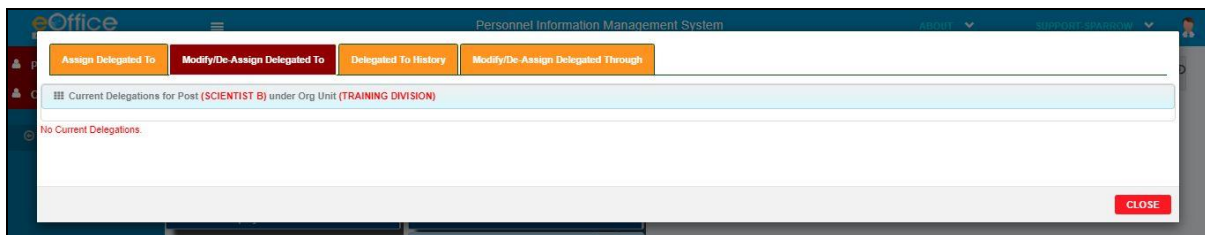

Fig.37

4. Click **Assign Delegated To** and search the **Org Post mapping** to whom the delegation is to be assigned **(Fig.38)**.
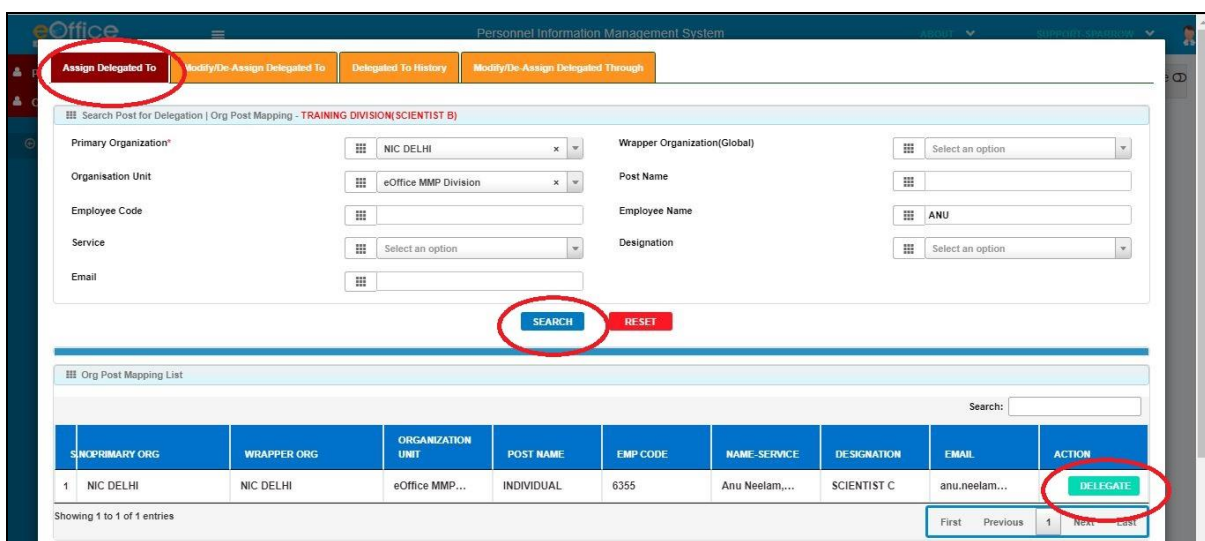

Fig.38

5. Click the **DELEGATE** button under the **Action** tab to assign delegation for a particular **Org Post mapping (Fig.39)**.

Fig.39

6. Click **Submit** button **(Fig.39)** by selecting the **Delegation Type** and **From & To dates**.

h. Root PD (Post Details):

1. It defines the highest post of the office instance and its creation is mandatory under every eOffice instance.

2. There can be multiple Wrapper (Global) Organisations in an eOffice instance but there can be only one Root PD as the hierarchy needs to be maintained from the highest Post. It is generally created at the inception of a particular eOffice instance. Can be changed at a later stage but should be handled carefully.
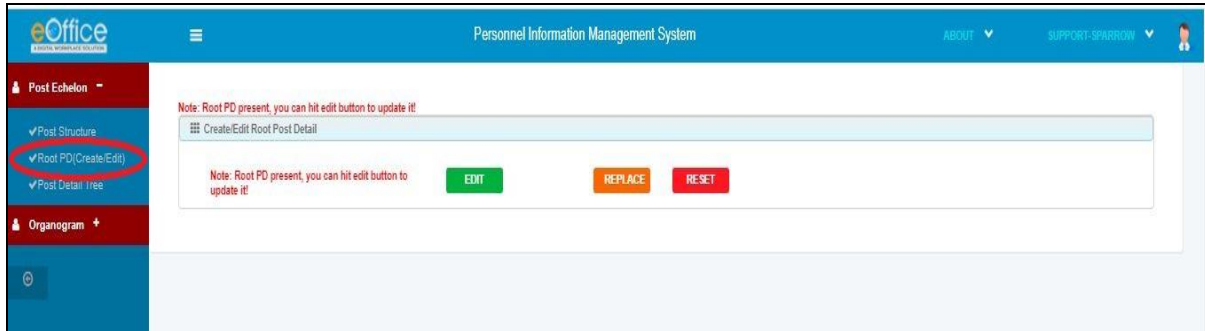

Fig.40

i. Post Detail Tree:

It is the tree-like structure of Post Details from the selected one for ease of understanding the hierarchy of Post in an Organization.
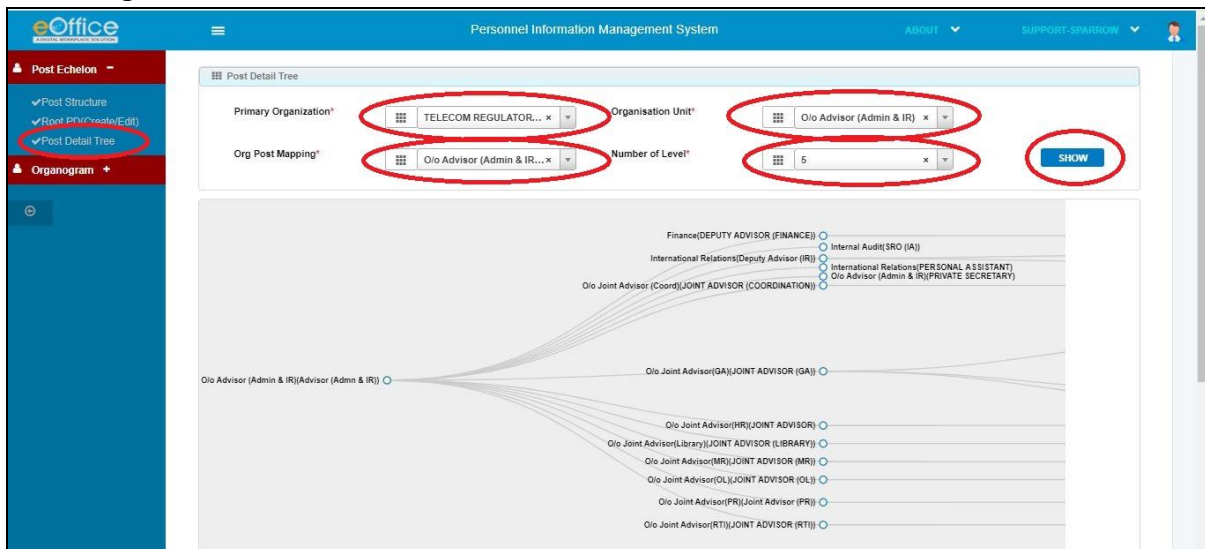

Fig.41

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