SOP FOR PIMS

How to create/add users in eoffice

Step1:- Login to eOffice through your email id and password.

Step 2:- Click on PIMS (personal information management system) section.

Step 3:- Go to Admin creator

(by default You will work on admin creator)

Step 4:- Click on create new employee

Step 5:- Fill the following mandatory details

1:- Login type :- click on NIC gov LDAP ID

2:- Login id :- first name of nic email id before @

3:- User name and Date of birth

4:- Email id(abc.ed@uk .gov.in)

5:- Appellation (Dr/Mr/Miss/Mrs) then fill Gender.

Step 6:- Click next

Step 7:- Fill the following mandatory details :-

1:- Primary organization

2:- Wrapper organization

3:- Organization unit (choose always office)

4:- Service(choose always No service)

5:- Service Cadre (choose not applicable)

eOffice
A DIGITAL WORKPLACE SOLUTION

6:- Date of joining govt service

7:- Source of requirement

8:- OU employee code

9:- Cadre service identification number (in this fill employee code) ,

10:- Service allotment year.

Step 8:- Click next

Step9:- Fill the following mandatory details :-

1:- Designation (search your designation)

2:- Appointment Type (if you not find your appoint type then fill direct or appointment basis)

3:- Designation appointment date

4:- Designation Joining date.

Step 10:- Click on Create user. Your user will add on Data base.

How to create Post for users in eoffice

Step 1:- Go to Post Admin

Step 2:- Click on Post Echelon Then click on Post structure

Step 3:- Search your Organization then you will find all the created employee list.

The very first name is your local admin/ nodal officer name (it will highlight with green colour)

Step 4:- Click on Local admin action button for further process(icon of eye or square)

Step 5:- you will find post of local admin

Step 6:- click on **icon " > "** you will find all child post under local admin

Step 7:- click on **square icon** then you will find several options like :-

a. **Relieve employee**
b. View/ Edit employee post
c. **Create child post**
d. Delegation workbench
e. Previous employee

Step 8:- For creating child post click on **Create child post**

Step 9:- Fill all mandatory details then click on **Save**

Step 10:- After this your post is created then Click square icon of new created child post

Step 11:- You will find here **Assign employee** option

Step 12:- Click Assign option

Step 13:- Now search employee name then you will find their name with Continue Action

Step 14:- Click on Continue button and it will open Assign employee page

Step 15:- Fill the mandatory fields and upload employee joining letter pdf and details of document

Step 16:- Now Click on **Assign**

Your employee will assign and Create all child post according to your department hierarchy and also assign all the employees after creating their post.

Step 17:- Now Search for employee and check if post is assigned or not.

How to Give Role in eoffice(role mapping)

{Note:- Only from local admin id roles can be distributed. For new role contact your local admin of department.**}**

Step 1:- Go on home page of eoffice and click on **File management system**.

Step 2:- Then go on **Admin Tab** and click on **Post role mapping**

Step 3:- Now Select your department and section and then click on search

Step 4:- Under list of users click on checkbox of employee

Step 5:- now go in roles dropdown menu and select the specific roles

Step 6:- Now click on add button

Step 7:- roles has been assigned successfully.

Note:- If you want to remove roles follow **step 1** to **step 5** and on **step 6** click on remove button.

If you want to Check the given roles click on **eye icon** under **Action tab**.

Role Mapping process is completed

How to Transfer in eOffice

{Note:- For transfer first thing you do check user (whom you want to transfer) eoffice is empty or not. All the files and receipt section is empty also created or closed section is empty.**}**

Step 1:- Open **Personal Information Management System**

Step 2:- Login as **Post Admin**

Step 3:- Then click on **Post Echelon** and then **Post structure** Showing on the left side.

Step 4:- Now search the employee name with mandatory fields and you will find their post.

Step 5:- Now click on **action button** showing with the post.

Step 6:- you will go on parent/child post

Step 7:- Now click on **square icon** then click on **Relieve employee**

Step 8:- Now upload their **Transfer order pdf** and fill other details

{**Note for step 8:-** pdf name should be small and contain no special character and then save it to your system and then upload.}

Step 9:- Now click on **Relieve** option

{Note:- " employee relieve successfully "}

Step 10:- Login as **Admin Creator**

Step 11:- Click on **Direct Transfer** showing on left side

Step 12:- Now search the employee name and you will find there **Initiate Action** Option.

Step 13:- Click on **Initiate Action**

Step 14:- It will open Employee Basic information

Step 15:- Now select their **New Wrapper organization** name{e.g- Department name}and there **New organization unit** name{e.g- office name}.

Step 16:- Now click on "**save".**

//Transfer successfully//

How to Promotion in eOffice

Step 1:- Open **Personal Information Management System**

Step 2:- Login as **Post Creator**

Step 3:- Search user in **Advance employee parameter**

Step 4:- Search employee name with mandatory details.

Step 5:- You will find their details with **Action button**

Step 6:- Click on **Action button**

Step 7:- You will find their name on the head with **Red color**

Step 8:- Then click on **personal information tab**

Step 9:- There is **OU(organization unit) Assignment** option

Step 10:- Click on **OU Assignment tab**

Step 11:- Then click on their **OU** you will find it under **OU Assigned**.

Step 12:- Now go back to **personal information tab** and find **Designation Tab**

Step 13:- Click on **Designation tab** where you will find their previous designation

Step 14:- Now click on **Edit**

Step 15:- Fill some mandatory fields in users details

- Active Designation Option :- Click on **NO**
- Designation Classification :- choose others
- Designation level rank :- choose default
- Designation Appointment date

Step 16:- Now click on **Submit**

{Now designation is Inactive}

Step 17:- Now again click on **Designation** tab on **personal information.**

Step 18:- Now Give new designation to user and fill all the mandatory details according to promotion.

- Designation: - New designation
- Designation Classification: - Others
- Designation Level: - Default
- Active Designation: - Yes
- Appointment type: - promotion Basis
- Designation Joining Date

Step 19:- Click on **Submit**

//Promotion Process Completed//