



Ministry of Rural Development
Government of India

Aajeevika
National Rural Livelihoods Mission (NRLM)



RSETI MIS OPERATING MANUAL

By Credo Infotech

User Manual

Version 1.0



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PREFACE

Purpose of This Document

This user manual aims to familiarize you with some of the tasks and processes of the MIS application.

Intended Audience

This document is intended for users at various RSETI's, who are familiar with the basic tasks and terminology of the application. It will enable you to understand the details of some of the tasks that can be performed using MIS.

1. Introduction

RSETI MIS (Management Information System) has been designed and developed to help RSETIs maintain their training and candidate details. This will also help the sponsoring banks to track and monitor the performances of their RSETI's. The MIS is an online application and can be accessed with Username and Password provided to the RSETIs and their controlling offices.

1.1 System Requirement

- Windows 2000, Windows XP, Windows Vista, or Windows 7
- Latest Browsers (Internet Explorer, Google Chrome, Mozilla Firefox)
- Internet Connection with a minimum bandwidth of 256kbps

This user manual covers some of the tasks that can be performed using RSETI MIS.

1.2 Getting Started / Navigate through MIS

The MIS window includes standard Windows components. Of particular interest:

- The **Header Bar** displays the Logos of the Sponsoring Organizations.



- The **Horizontal Toolbar** contains the main menus of the tasks that performing the most common tasks.



- The **Left Menu** contains the sub menus of the Horizontal menu.



- The **Main Window Area** displays information about the activities and operations you are carrying out.

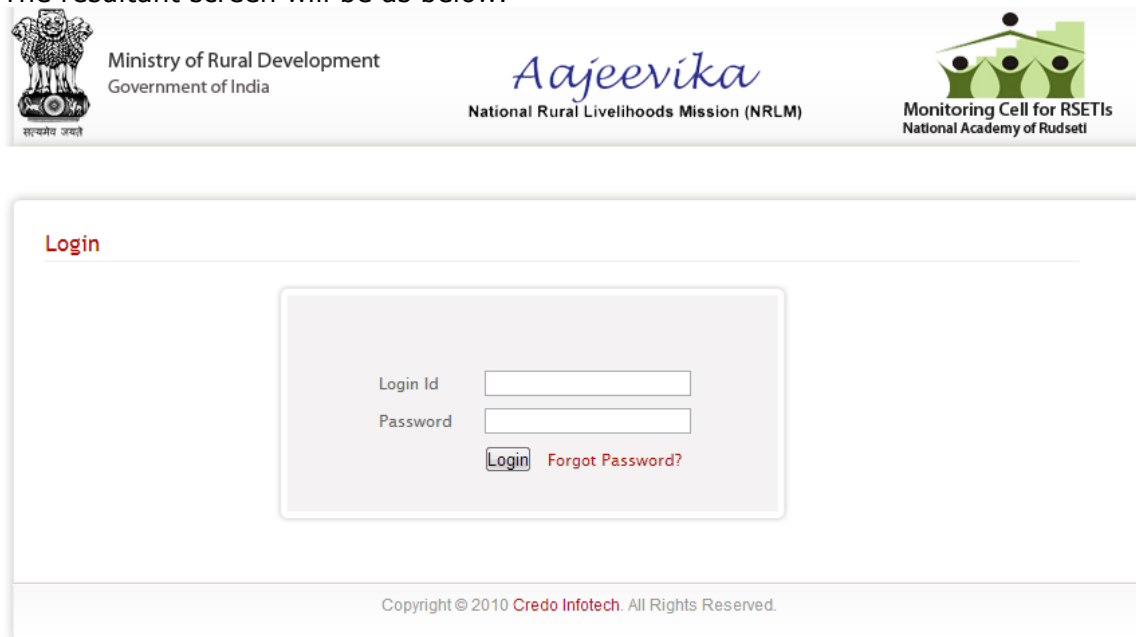
Home > Activities > Programs

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary
1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add View	10	Add	View
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

1.3 How to Login in to the MIS

Open Internet Browser (IE, Chrome, Firefox etc.) and Type the URL <http://www.rsetimis.org/> in the address bar to access the MIS.

The resultant screen will be as below.



Now, use the username and password provided to your Institution to login to the system.

Note: the Password is case sensitive.

1.4 Introduction of Buttons and Icons

	Add New Record
	Delete Record
	Edit Record
	View Record
	Home Button
	Sign out / Logout Button

2. Settings

2.1 How to ADD USERS

User Name	User Type	Institute Name	Designation	Created On	Last Updated On		
1	Demo Admin	Institute Admin	RSETI - Demo	26/10/2012	26/10/2012		
2	Ravi Shankar	Institute Admin	RSETI - Demo	AP	16/11/2012	16/11/2012	
3	Ganesh Kanna	Institute Admin	RSETI - Demo	TNWDC	16/11/2012	16/11/2012	

Select **SETTINGS** from the horizontal menu and then click on **Users** from the left menu. From the above screen click on as shown above to add more users.

Now, from the below screen select the type of user you want to create and also enter all the other relevant details in the fields and click on save.

* indicates mandatory fields

Edit User

You will be able to **Edit** the user by clicking on the as shown below.

User Name	User Type	Institute Name	Designation	Created On	Last Updated On		
1	Demo Admin	Institute Admin	RSETI - Demo	26/10/2012	26/10/2012		
2	Ravi Shankar	Institute Admin	RSETI - Demo	AP	16/11/2012	16/11/2012	
3	Ganesh Kanna	Institute Admin	RSETI - Demo	TNWDC	16/11/2012	16/11/2012	

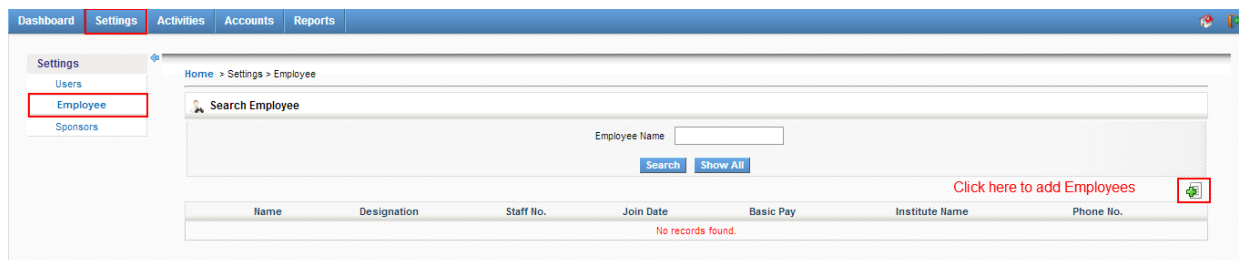
Delete User


You will be able to **Delete** the user by clicking on the as shown below.

User Name	User Type	Institute Name	Designation	Created On	Last Updated On		
1	Demo Admin	Institute Admin	RSETI - Demo	26/10/2012	26/10/2012		
2	Ravi Shankar	Institute Admin	RSETI - Demo	AP	16/11/2012	16/11/2012	
3	Ganesh Kanna	Institute Admin	RSETI - Demo	TNWDC	16/11/2012	16/11/2012	

Note: Any details once deleted cannot be reverted back.

2.2 How to ADD Employees








Select **SETTINGS** from the horizontal menu and then click on **Employees** from the left menu. From the above screen click on  as shown above to add more Employees.

Now, in below screen enter all the fields with relevant information about the Employee and click on save.


*indicates mandatory fields





Edit Employee

You will be able to **Edit** the Employee by clicking on the  as shown below.

	Name	Designation	Staff No.	Join Date	Basic Pay	Institute Name	Phone No.		
1	 Rahul Sharma	Senior Faculty	0120	01/12/2009	25,000.00	RSETI - Demo		View	
2	 Pankaj Yadav	Faculty	0122	01/12/2010	20,000.00	RSETI - Demo		View	

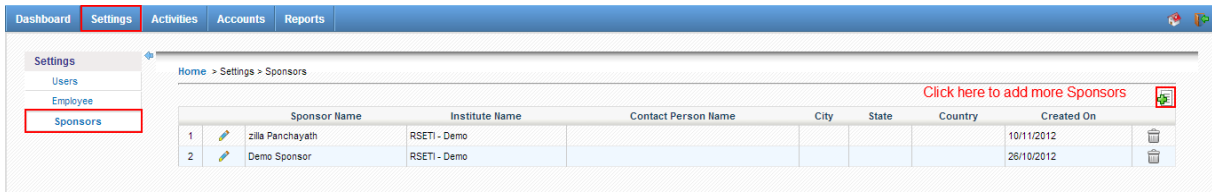
Delete Employee


You will be able to **Delete** the Employee by clicking on the  as shown below.

	Name	Designation	Staff No.	Join Date	Basic Pay	Institute Name	Phone No.		
1	 Rahul Sharma	Senior Faculty	0120	01/12/2009	25,000.00	RSETI - Demo		View	
2	 Pankaj Yadav	Faculty	0122	01/12/2010	20,000.00	RSETI - Demo		View	

Note: Any details once deleted cannot be reverted back.

2.3 How to ADD Program Sponsors








Select **SETTINGS** from the horizontal menu and then click on **Sponsors** from the left menu. From the above screen click on  as shown above to add more **Sponsors**.

Now, in below screen enter all the fields with relevant information about the **Sponsor** and click on save.


*indicates mandatory fields





Edit Sponsor

You will be able to **Edit** the Sponsor by clicking on the  as shown below.

	Sponsor Name	Institute Name	Contact Person Name	City	State	Country	Created On	
1	 zilla Panchayath	RSETI - Demo					10/11/2012	
2	 Demo Sponsor	RSETI - Demo					26/10/2012	

Delete Sponsor

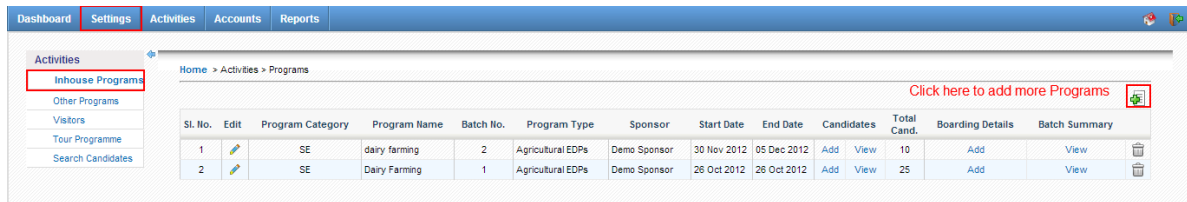
You will be able to **Delete** the Sponsor by clicking on the  as shown below.


	Sponsor Name	Institute Name	Contact Person Name	City	State	Country	Created On	
1	 zilla Panchayath	RSETI - Demo					10/11/2012	
2	 Demo Sponsor	RSETI - Demo					26/10/2012	

Note: Any details once deleted cannot be reverted back.

3. Activities

3.1 How to ADD In house Training Programs



Select **Activities** from the horizontal menu and then click on **Inhouse Programs** from the left menu. From the above screen click on  as shown above to add more **Inhouse Programs**.

Now, in below screen enter all the fields with relevant information about the **Program** and click on save.

Add Inhouse Program

Institute Name * RSETI - Demo

Program Category * --Select--

Program Type * --Select--

Program Name *

Description

Sponsor Name * --Select--

Start Date *

Government Sponsored * No

Program Sub Type * --Select--

Batch Number * 3
(Click on the number to edit.)

Total Trainees *

End Date *

Note: The fields here are inter related, when you select an option from the dropdown the next drop down will appear based on your previous selection.

In case you do not find the name of the program in the **Program Sub Type** then please select the option **OTHERS** from the dropdown and type the **Program Name**.

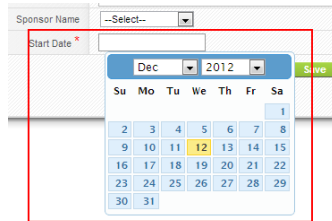
Description is not mandatory, however in case you wish to add any relevant information about the program it can be added here.

The **Batch Number** is usually auto generated; however it can be edited before saving the program.

The **Sponsor** name is pulled from list of sponsors you have created through the **Settings** menu.

The **Total Trainees** field will allow you to enter the number of trainees in that particular training. This will freeze the No of trainees to this number and will not allow more trainees to be added when adding trainees.

The **Start Date** and **End Date** are calendar fields; when you click on these fields a calendar will appear from which you need to make a selection. As shown below.



* indicates mandatory fields

3.2 How to ADD Candidate/Trainee in to a Training Program

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary
1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add View	10	Add	View
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

Once you have added / created a **New Training Program**, you will be able to **View** or **ADD** more **candidates** to the **Training Program** by clicking on either **View** or **ADD** as shown in the above picture.

Clicking on **ADD** as shown in the above picture it will direct you to the screen as shown below where you can enter information of a candidate and click on **Save** to save the candidate; clicking on **Save & Add More** will save the candidate information and also bring in a new application to add new candidate.

Home > Activities > Candidates

Add Candidate

Institute Name * RSETI- Demo Program Name dairy farming Batch No 2 Roll No 2

Personal Details

Name of the candidate * Father / Husband Name

Date Of Birth --DD-- --MM-- --YYYY-- Age *

Religion --Select-- Caste * --Select--

Education --Select-- Physically Handicapped --Select--

Sex * --Select-- Poverty Line * --Select--

Landline: -

Phone No for communication Mob1:

Mob2:

Occupation of the Family

Present Occupation of the Candidate Unemployed Photo No file chosen

Contact Details

Nativity Area * --Select--

Address

Village Hobli / Post

Taluk / Block State * --Select--

District * --Select-- Pin code

Bank Details

Sponsored candidate by bank No

Other Details

Training interested Relevant Experience No Experience

If you are student, in which class you are studying Name of the sponser if any Bank / NGO / Govt. department

Comments/Remarks

Comments

View Candidate list of a particular training program .

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary
1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add View	10	Add	View
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

Clicking on **View** will bring the list of all the candidates in that particular training program. As shown in the below picture. You can go back to the Program list page by clicking on the **BACK** button as shown below.

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	No Photo Available	Male	23	SC		In Process	
2			candidate	No Photo Available	Male	24	SC		In Process	
3			Demo Candidate	No Photo Available	Male	22	GEN	1234569870	Settled	

Further, from the above screen you will be able to **View**, **Edit** or **Delete** candidate information.

View Candidate information

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	No Photo Available	Male	23	SC		In Process	

Click on as shown in the above picture to view the detailed information about the Candidate / Trainee as shown in the below picture.

View Candidate	
Institute Name	RSETI - Demo
Program Name	Dairy Farming
Batch No.	1
Roll No.	3
<div style="text-align: center;">No Photo Available</div>	
Personal Details	
Name of the candidate	candidate
Date Of Birth	23/11/1989
Religion	Hindu
Education	10th
Sex	Male
Physically Handicapped	No
Cast	SC
Landline	
Poverty Line	APL
Phone No for communication	9821
Occupation of the Family	Unemployed
Present Occupation of the Candidate	
Contact Details	
Locality Area	Rural
Address	
Village	
Taluk	
State	Andhra Pradesh
Zip	
District	LOHIT
Bank Details	
Sponsored candidate by Bank	No
Other Details	
Training interested	
Relaxation Experience	No Experience
If you are student, in which class you are studying: _____ Name of the sponsor if any Bank / NGO / Govt. department: _____	
Comments/Remarks	
Comments: _____	
Settlement Details	
Sl. No.	Project Name
	No records found
Remarks: _____	

Edit Candidate information

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	No Photo Available	Male	23	SC		In Process	

By clicking the as shown in the above screen the candidate / trainee screen will be displayed in the edit mode.

3.3 How to ADD Boarding details of a training program.

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary
1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add View	10	Add	View
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

Click on **Activities>>Inhouse Programs** to reach the list of programs and then click on **ADD [Boarding Details]** corresponding to the training program, as shown in the picture above. This will direct you to the screen as shown below.

Training Program		dairy farming	Batch No.	2	No. of Candidates	10										
No. of Days		6														
Rates																
Break Fast (Rs.)*	Morning Tea (Rs.)*	Lunch (Rs.)*	Afternoon Tea (Rs.)*	Dinner (Rs.)*	Advances, if any (Rs.)											
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>											
		Add Next Day		Delete Last Day												
Day	Date	Break Fast			Morning Tea			Lunch			Afternoon Tea			Dinner		
		Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total
1		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		Save		Cancel												

On this screen, you will need to first enter the rates of the respective items, viz., Breakfast, Tea/Coffee, Lunch, Dinner, etc. as shown in the above picture.

Then in the bottom part of the screen you will need to enter the no of Trainees /Candidate and No. of Guest Faculties that were available for Break Fast, Morning Tea, Lunch, Afternoon Tea and Dinner. Once entered click on save.

For example:

In a training program if there are 15 Trainees/Candidates and 2 guest faculties the entry would look like in the screen below.

Day	Date	Break Fast			Morning Tea			Lunch			Afternoon Tea			Dinner		
		Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total
1	05/12/2012	15	2	17	15	2	17	15	15	30	15	2	17	15	2	17

To enter subsequent day's boarding information, Click on **Settings>>Inhouse Programs** to reach the list of programs and then click on **ADD [Boarding Details]** corresponding to the training program. Then click on **Add Next Day** button to add the next day and there is a **Delete Last Day** button to delete the last day information. As shown in the picture below.

		Break Fast			Morning Tea			Lunch			Afternoon Tea			Dinner		
Day	Date	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total	Tr	GF	Total
1	05/12/2012	15	2	17	15	2	17	15	15	30	15	2	17	15	2	17
2																

3.4 How to ADD settlement to a Trainee after Follow up

Select **Activities>>Inhouse Programs** and for a particular training program for which you want to add settlement details, click on View Candidates as shown in the picture below.

Sl. No.	Edit	Program Category	Program Name	Batch No.	Program Type	Sponsor	Start Date	End Date	Candidates	Total Cand.	Boarding Details	Batch Summary
1		SE	dairy farming	2	Agricultural EDPs	Demo Sponsor	30 Nov 2012	05 Dec 2012	Add View	10	Add	View
2		SE	Dairy Farming	1	Agricultural EDPs	Demo Sponsor	26 Oct 2012	26 Oct 2012	Add View	25	Add	View

Clicking on **View** will bring the list of all the candidates in that particular training program. As shown in the below picture.

Sl. No.	View	Edit	Candidate Name	Photo	Sex	Age	Caste	Contact No.	Settlement Status	Delete
1			candidate	No Photo Available	Male	23	SC		In Process	
2			candidate	No Photo Available	Male	24	SC		In Process	
3			Demo Candidate	No Photo Available	Male	22	GEN	1234569870	Settled	

Now click on [Edit button] for the candidate that you wish to add settlement details. This will direct you to the edit page of candidate information. As shown in the picture below.

Home > Activities > Candidate Profile

Edit Candidate Add Settlement


Institute Name * RSETI - Demo Program Name Dairy Farming Batch No 1 Roll No 3

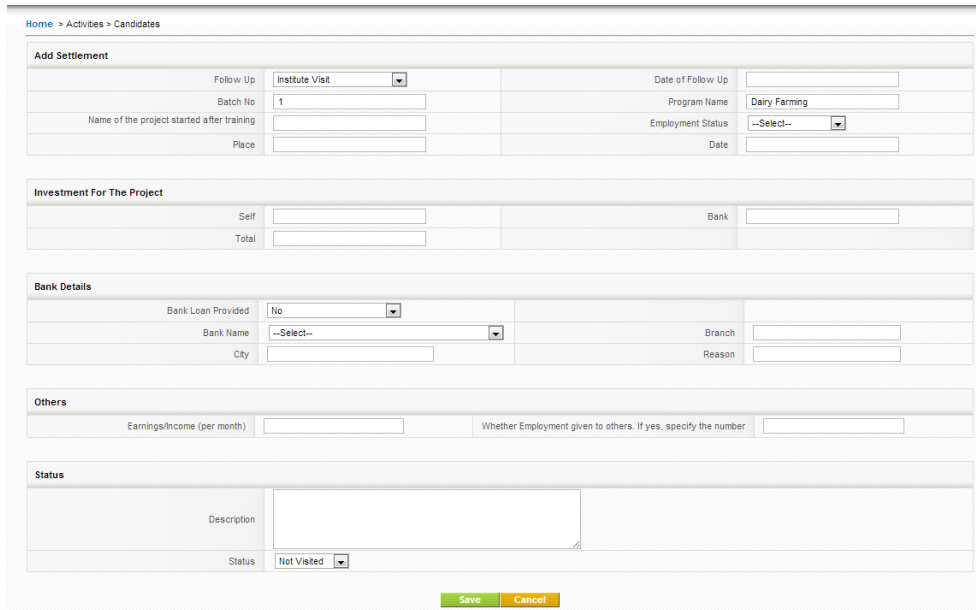
Personal Details

Name of the candidate * candidate Father / Husband Name

Date Of Birth 1 Jan 1989 Age * 23

No Photo Available

Now, Click on  **Add Settlement** as shown in the picture above to add settlement for a candidate. This will direct you to the screen below.



The screenshot shows a web application interface for adding settlement details for a candidate. The breadcrumb navigation is 'Home > Activities > Candidates'. The form is titled 'Add Settlement' and contains the following sections:

- Add Settlement:** Includes fields for 'Follow Up' (dropdown menu with 'Institute Visit' selected), 'Date of Follow Up', 'Batch No' (text box with '1'), 'Program Name' (text box with 'Dairy Farming'), 'Name of the project started after training', 'Employment Status' (dropdown menu with '--Select--' selected), 'Place', and 'Date'.
- Investment For The Project:** Includes 'Self' and 'Bank' input fields, and a 'Total' field.
- Bank Details:** Includes 'Bank Loan Provided' (dropdown menu with 'No' selected), 'Bank Name' (dropdown menu with '--Select--' selected), 'City', 'Branch', and 'Reason'.
- Others:** Includes 'Earnings/Income (per month)' and 'Whether Employment given to others. If yes, specify the number'.
- Status:** Includes a 'Description' text area and a 'Status' dropdown menu with 'Not Visited' selected.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

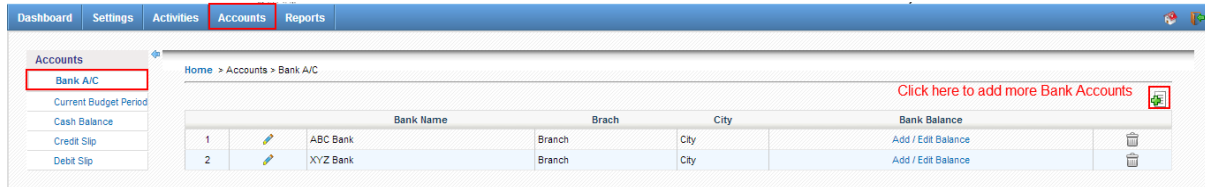
Note: The status selection plays a very important role. Below are the different statuses you can select.

- 1. Not Visited:** This status is selected by default and remains until changed.
- 2. Settled:** Select this status only after the candidate is settled; once this status is selected and saved you will not be able to change it or add more details to settlement page.
- 3. In Progress:** Select this status when the candidate is in the process of setting up his project/business. When this status is selected you will be able to change it later and add more details to the settlement page.
- 4. No Progress:** Select this status when the candidate is not sure of setting up his project/business, however may setup something in 3-6 months. When this status is selected you will be able to change it later and add more details to the settlement page.
- 5. Wasted:** Select this status when the candidate is sure of not setting up a project / business of his own. When this status is selected you will not be able to change it later and add more details to the settlement page.


4. Accounts

This is a basic accounting module that has been provided as add on to the MIS. Below are some of the operations that can be handled in this module.

4.1 How to add Bank Account Details



Click on **Accounts** on the Horizontal Menu and then click on **Bank A/C** on the left menu. You will be directed to a screen as shown above.

Then Click on  to add more Bank Accounts. You will be directed to the below screen.


The screenshot shows the 'Add Bank Account' form. It has several input fields: 'Bank Name *', 'Address', 'Branch *', 'City', 'State', and 'Pin Code'. The asterisk indicates mandatory fields. There are 'Save' and 'Cancel' buttons at the bottom of the form.

Enter all the relevant details and click on Save.

* indicates mandatory fields

Once the Bank account has been created, you will be directed to the Bank Account list page as shown below. Now click on **Add/Edit Balance**, to add or edit opening balance of a particular bank account.

The screenshot shows the 'Bank Account list page' with a table of bank accounts. The table has columns for 'Bank Name', 'Branch', 'City', and 'Bank Balance'. The table contains three rows: 'ABC Bank', 'XYZ Bank', and 'RST Bank'. The 'Bank Balance' column has a link 'Add / Edit Balance' for each row. A plus icon is visible in the top right corner of the table area.

Upon clicking of **Add/Edit Balance** you will be directed to a page as shown below. Now click on  to arrive at the below screen.


The screenshot shows the 'Add Bank Amount' form. It has several input fields: 'Institute' (RSETI - Demo), 'Bank' (ABC Bank), 'Year' (a dropdown menu with '--Select--'), and 'Amount *'. There are 'Save' and 'Cancel' buttons at the bottom of the form.

Now select the year and enter the amount and click on **save**.

4.2 How to add current Budget period

Click on **Accounts** on the Horizontal Menu and then click on **Bank A/C** on the left menu. You will be directed to a screen as shown below.


The screenshot shows the 'Accounts' module interface. The left sidebar has 'Current Budget Period' highlighted. The main content area is titled 'View Budget Period' and contains two input fields: 'Current budget year starts from' and 'Current budget year ends on'. A red box highlights an edit icon in the top right corner.

Now click on  to add/edit the **Current Budget Period**.

4.3 How to Add Cash Balance

Click on **Accounts** on the Horizontal Menu and then click on **Cash Balance** on the left menu. You will be directed to a screen as shown below.


The screenshot shows the 'Accounts' module interface. The left sidebar has 'Cash Balance' highlighted. The main content area is titled 'View Cash Balance' and contains an input field for 'Opening Cash Balance'. A red box highlights an edit icon in the top right corner.

Now click on  to add/edit the **Cash Balance**.

4.4 How to Add Credit Slips

Click on **Accounts** on the Horizontal Menu and then click on **Credit Slip** on the left menu. You will be directed to a screen as shown below.

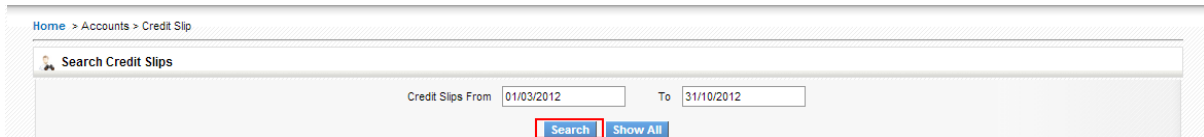
The screenshot shows the 'Accounts' module interface. The left sidebar has 'Credit Slip' highlighted. The main content area is titled 'Search Credit Slips' and includes search filters for 'Credit Slips From' and 'To', along with 'Search' and 'Show All' buttons. Below is a table with columns: Date, Slip No, Amount Credited, and Mode of Credit. A red box highlights an add icon in the top right corner.

Now click on  to add **Credit Slip**. Upon clicking you will be directed to the below screen where you will be able to enter the details of the credit slip.

The screenshot shows the 'Accounts' module interface. The left sidebar has 'Credit Slip' highlighted. The main content area is titled 'Credit Amount' and contains a form with the following fields: Date, Mode of Payment, Amount, Remarks / Towards, Slip No (set to 1), and Suspense Credit (Yes/No). At the bottom are 'Save' and 'Cancel' buttons.

Search for Credit Slips

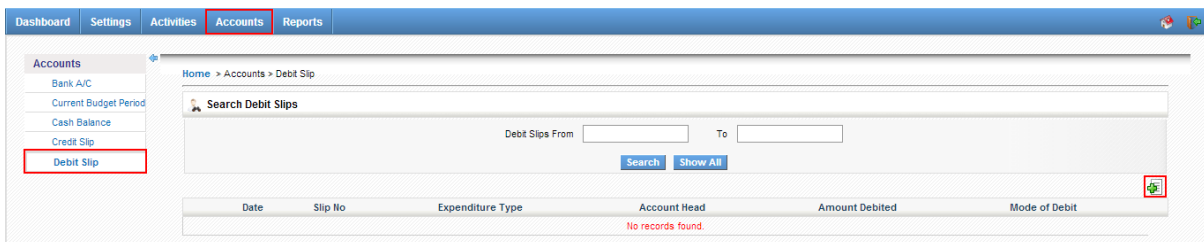
You will be able to search for Credit slips of a particular date range. By selecting the date and clicking on Search.




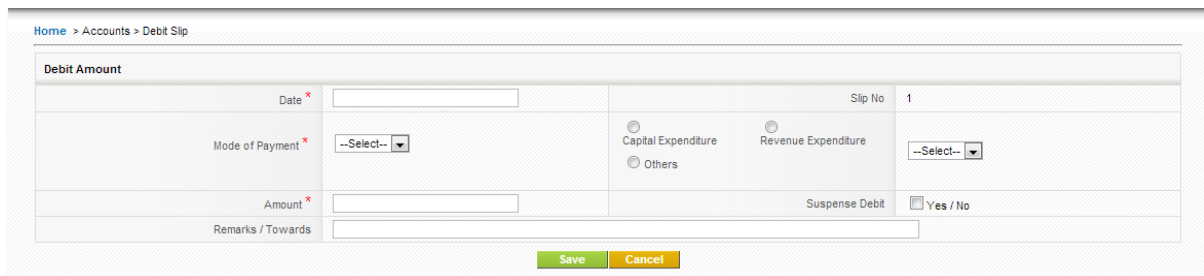
This action will get all the credit slips of a particular date range you have selected.

4.5 How to Add Debit Slips

Click on **Accounts** on the Horizontal Menu and then click on **Debit Slip** on the left menu. You will be directed to a screen as shown below.



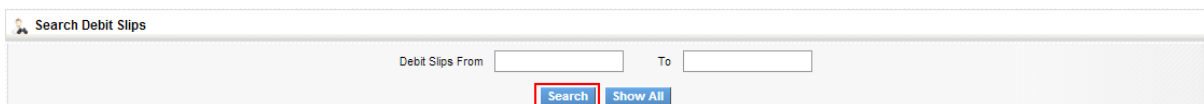
Now click on  to add **Debit Slip**. Upon clicking you will be directed to the below screen where you will be able to enter the details of the debit slip.



Once you have entered and selected the relevant items, click on **Save**.

Search for Debit Slips

You will be able to search for Debit slips of a particular date range. By selecting the date and clicking on Search.



This action will get all the Debit slips of a particular date range you have selected.