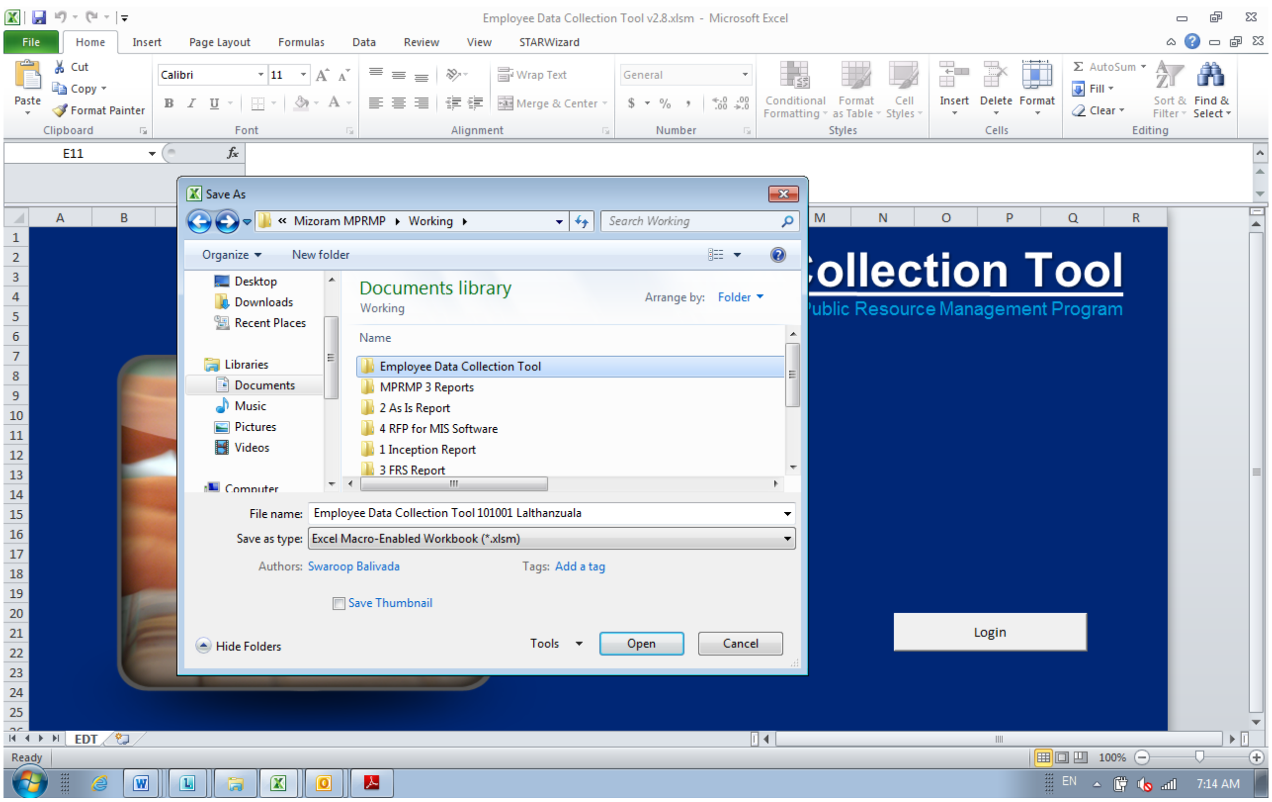
Employee Data Collection Tool

Instruction Manual

Contents

Before you Start

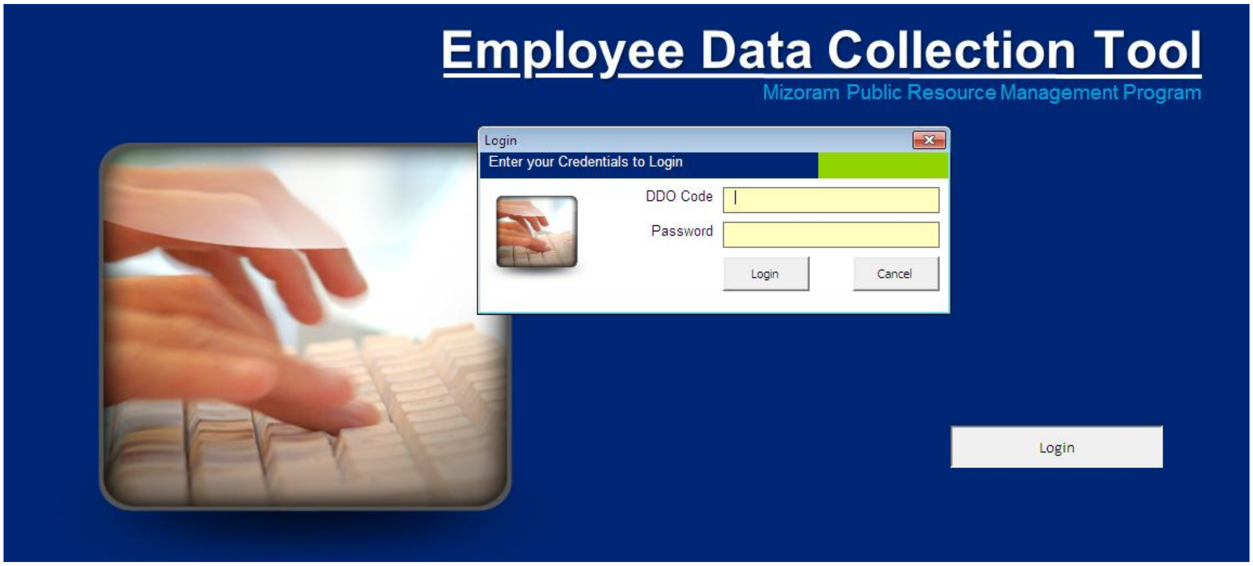
1. **Keep a printout or softcopy of this Instruction manual handy so that you can refer to it easily while doing data entry.**
2. Copy the .xlsm (Employee Data collection tool) and the instruction manual in a folder.
3. Open the .xlsm file and save it as **'Employee Data Collection Tool_<your DDO code>_<name of the person entering the data>'.**
   For example:
   DDO Code: 101001
   Name of the Person: Lathanzuala
   Then, the file should be saved as: Employee Data Collection Tool_101001_Lathanzuala



4. Thereafter 'login' as described in the next section.

Login

1. Click on Login



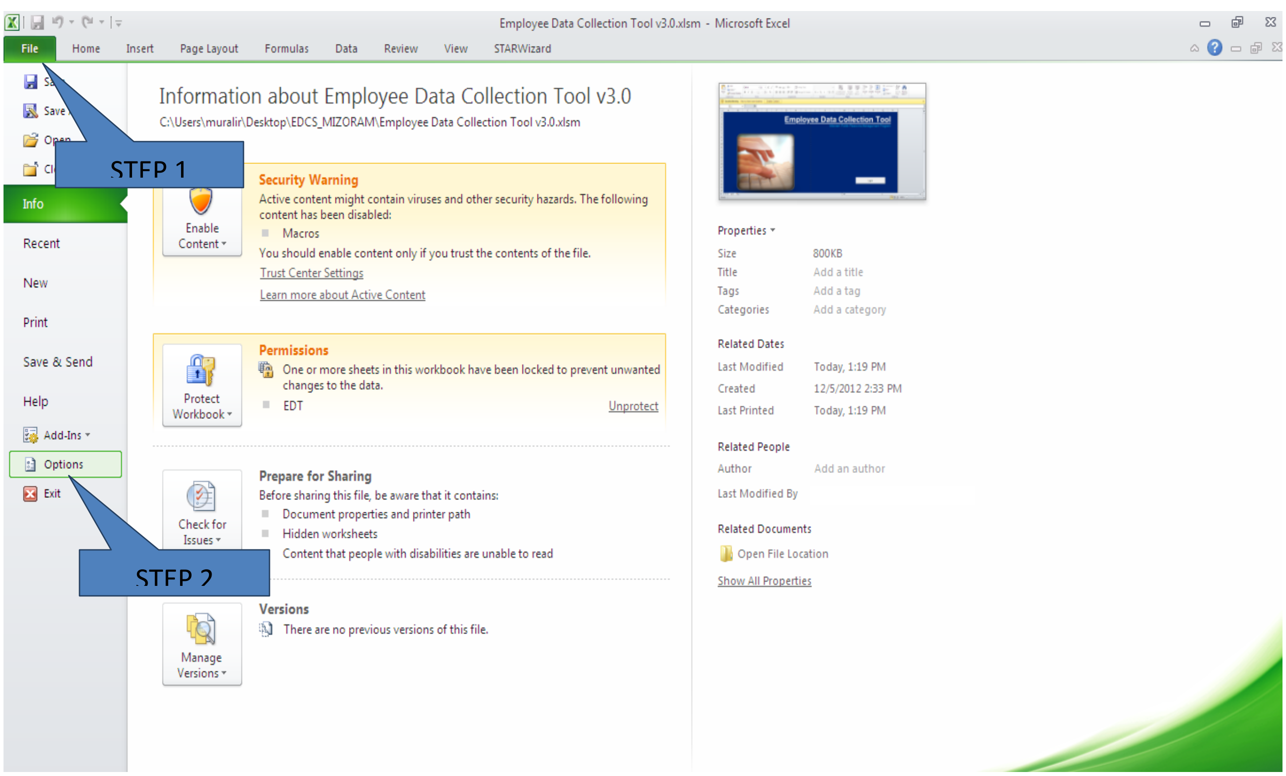
1. Enter your DDO Code
2. Enter Password – **MPRMP2013**
3. Click "Login"

Error Message

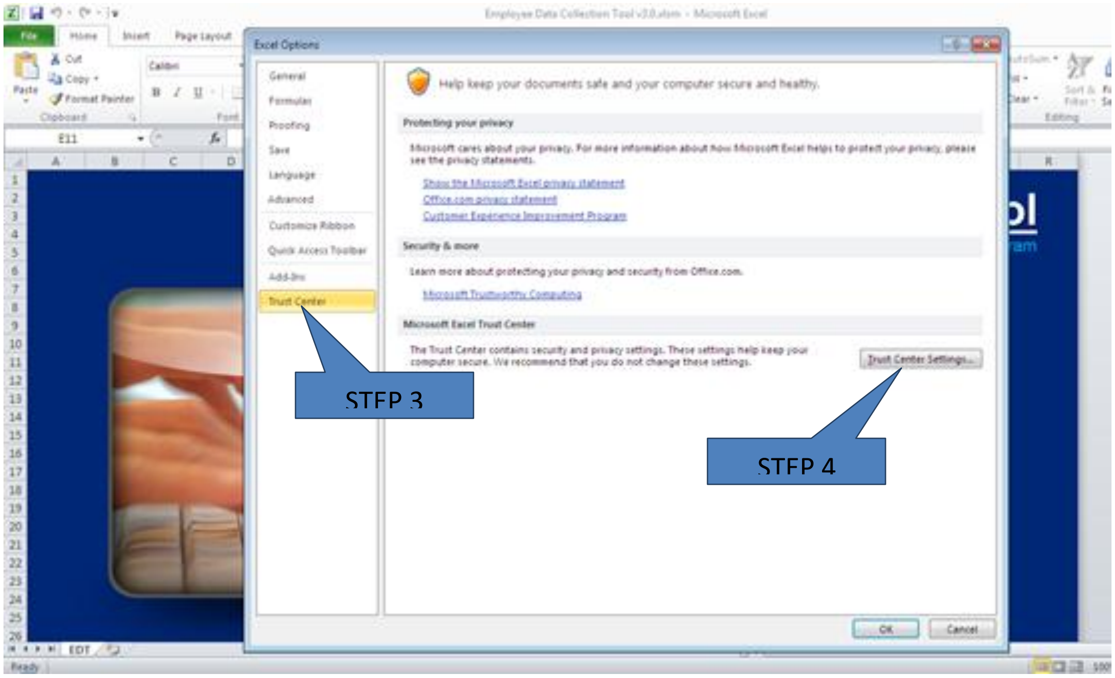
Error Message in Excel 2007/ Excel 2010

1. If you are using Excel 2007 or Excel 2010, an error box may be shown saying that the macros have been disabled.

2. Follow the steps given below to resolve the issue:
   Step 1: Click on File or Microsoft Office logo at the top left corner of MS-Excel
   Step 2: Click "Options"



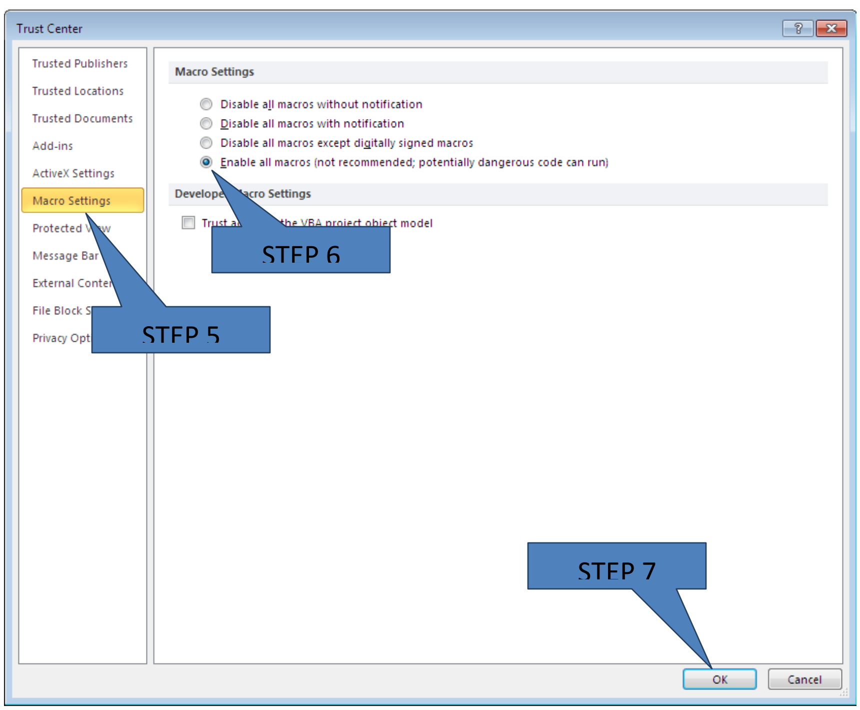
Step 3: Click "Trust Center" as shown in the picture below



Step 4: Click "Trust Center Settings"

Step 5: Click "Macro Settings"

Step 6: Select the circle beside "Enable all Macros" as shown in the picture below

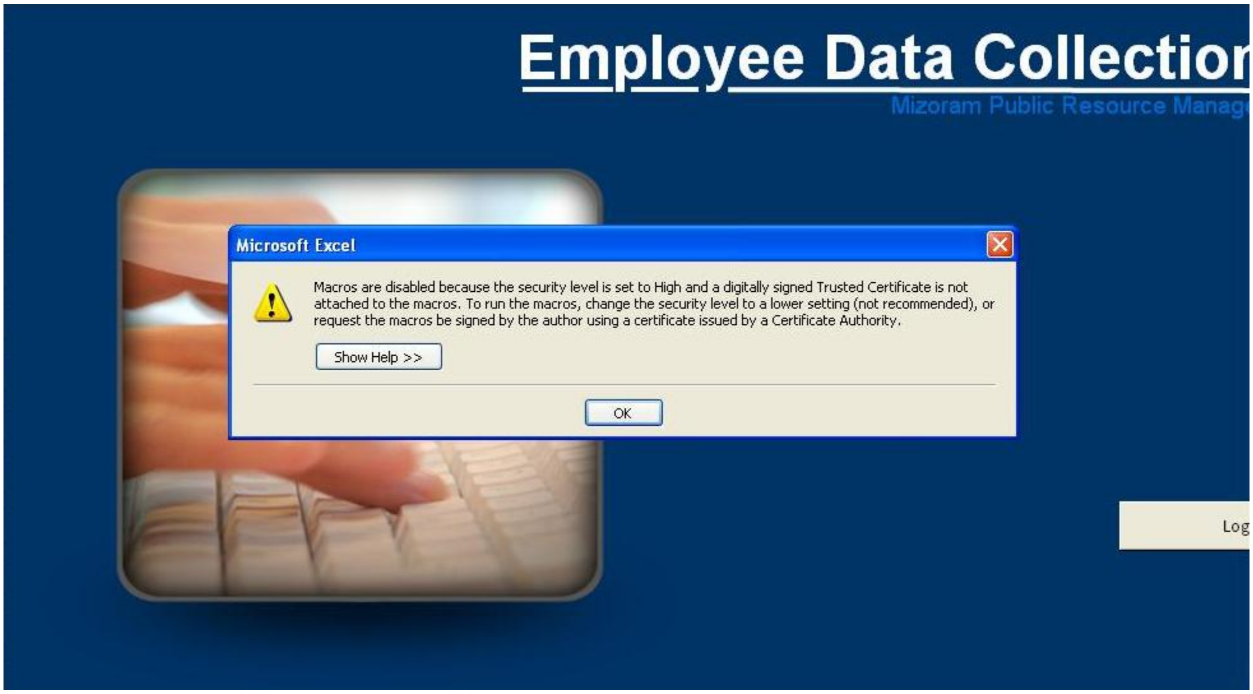


Step 7: Click "OK" until the Employee Data Collection Tool Login screen is visible

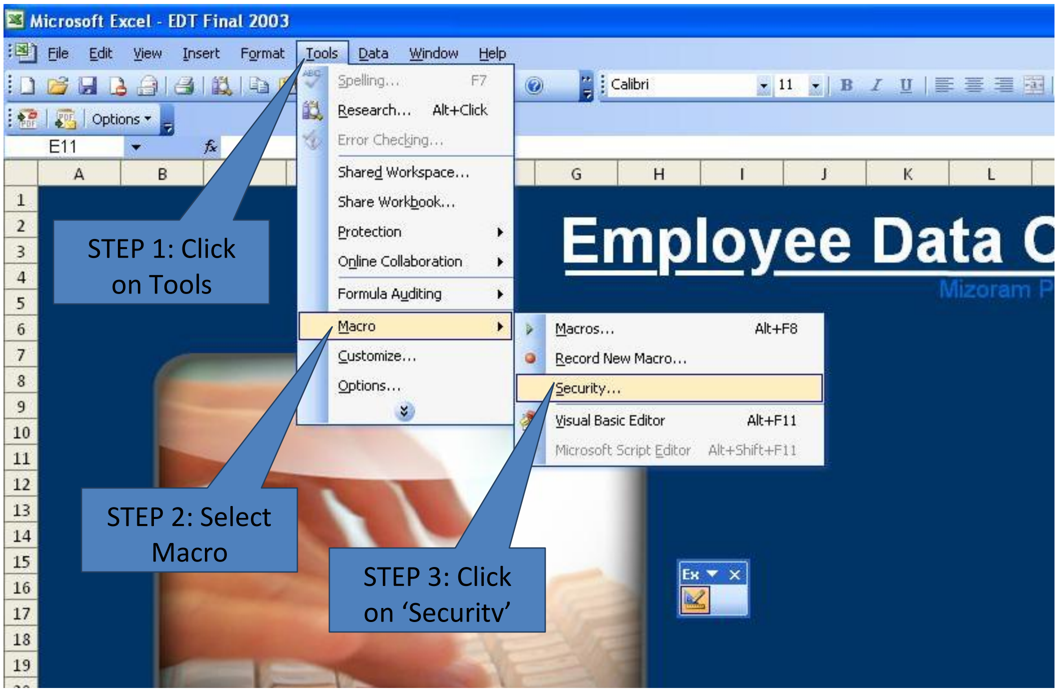
Step 8: Close the MS-Excel application and re-open the Employee Data Collection Tool again

Error Message in Excel 2003

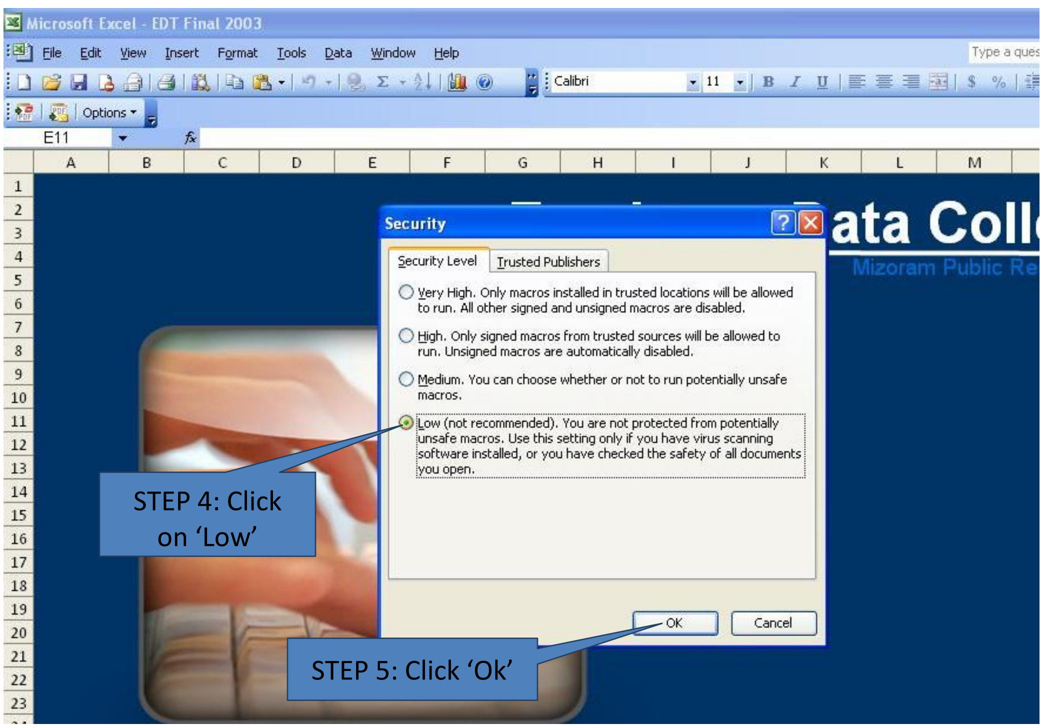
1. If you are using Excel 2003, an error box may be shown saying that the macros have disabled.



3. Follow the steps given below to resolve the issue:
   Step 1: Click on 'Tools' in the toolbar
   Step 2: Point your mouse on "Macro" as shown in the picture below
   Step 3: Click on "Security"



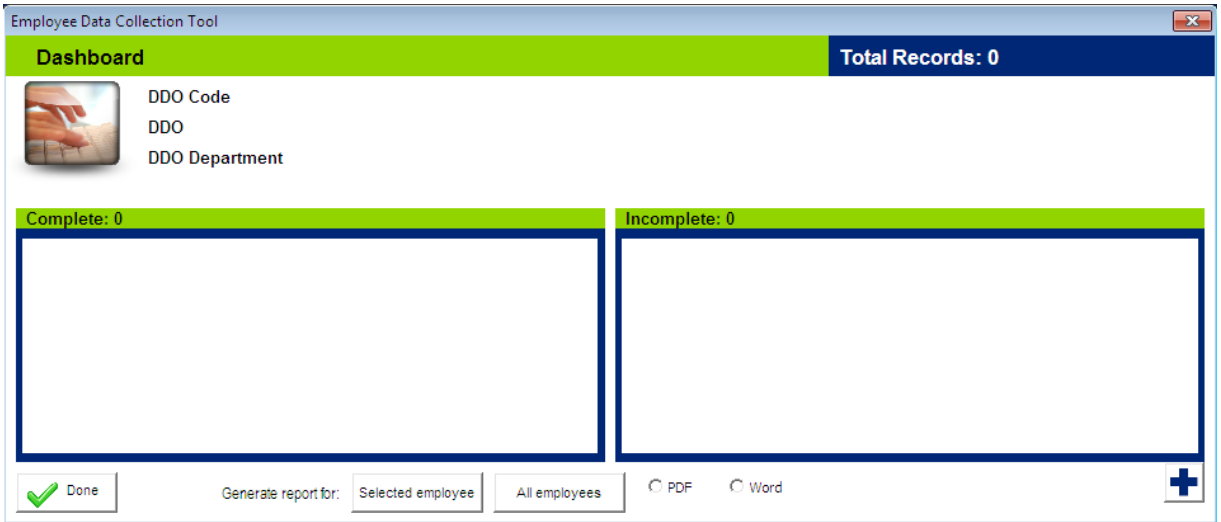
Step 4: Select the circle beside "Low" as shown in the picture below



Step 5: Click 'Ok'

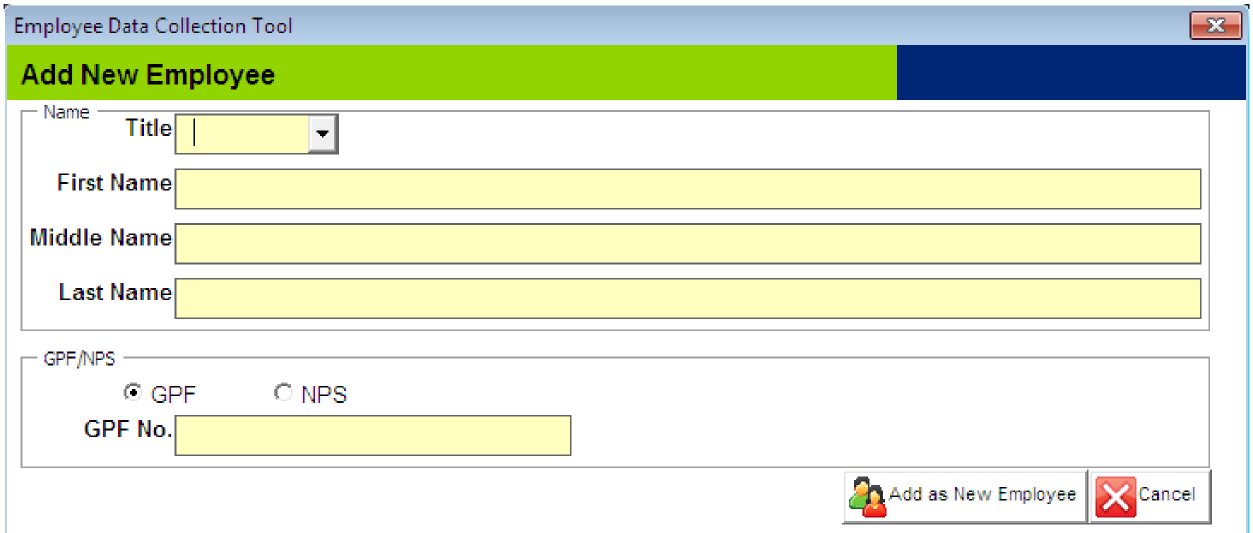
Step 6: Close the Excel file and re-open it

Dashboard



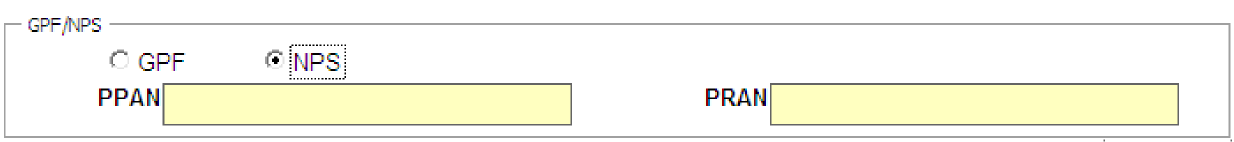
1. This is the Main Control Screen
2. Number of employees whose data has been entered is shown on top right.
3. Lists show employees with complete and incomplete data.
4. Click on “+” to start entering data for a new employee.

Add Employee



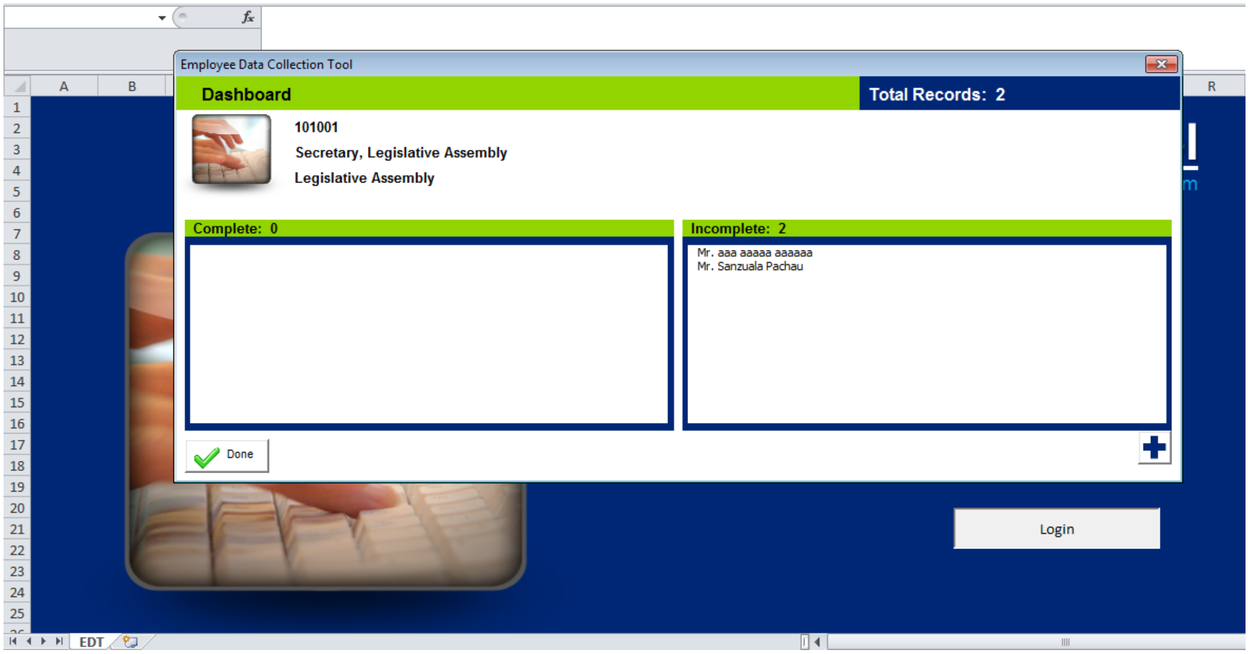
NOTE: All fields are Mandatory.

1. **Name**
   1.1. Select the title of the employee from the dropdown list
   1.2. Enter the First Name, Middle Name and Last Name of the employee.
2. **GPF/NPS**
   2.1. Click on the button beside GPF or NPS (as applicable)
      2.1.1. If GPS button is clicked, then provide GPF Number in the box
      2.1.2. If NPS button is clicked, then provide PPAN and PRAN Number in the boxes as shown below



3. **<u>BE CAREFUL WHILE ENTERING DATA IN THIS SECTION AS YOU WILL NOT BE ABLE TO EDIT IT</u>**
4. **<u>Make sure the information is typed correctly</u>**
5. **Click on "Add as New Employee"**

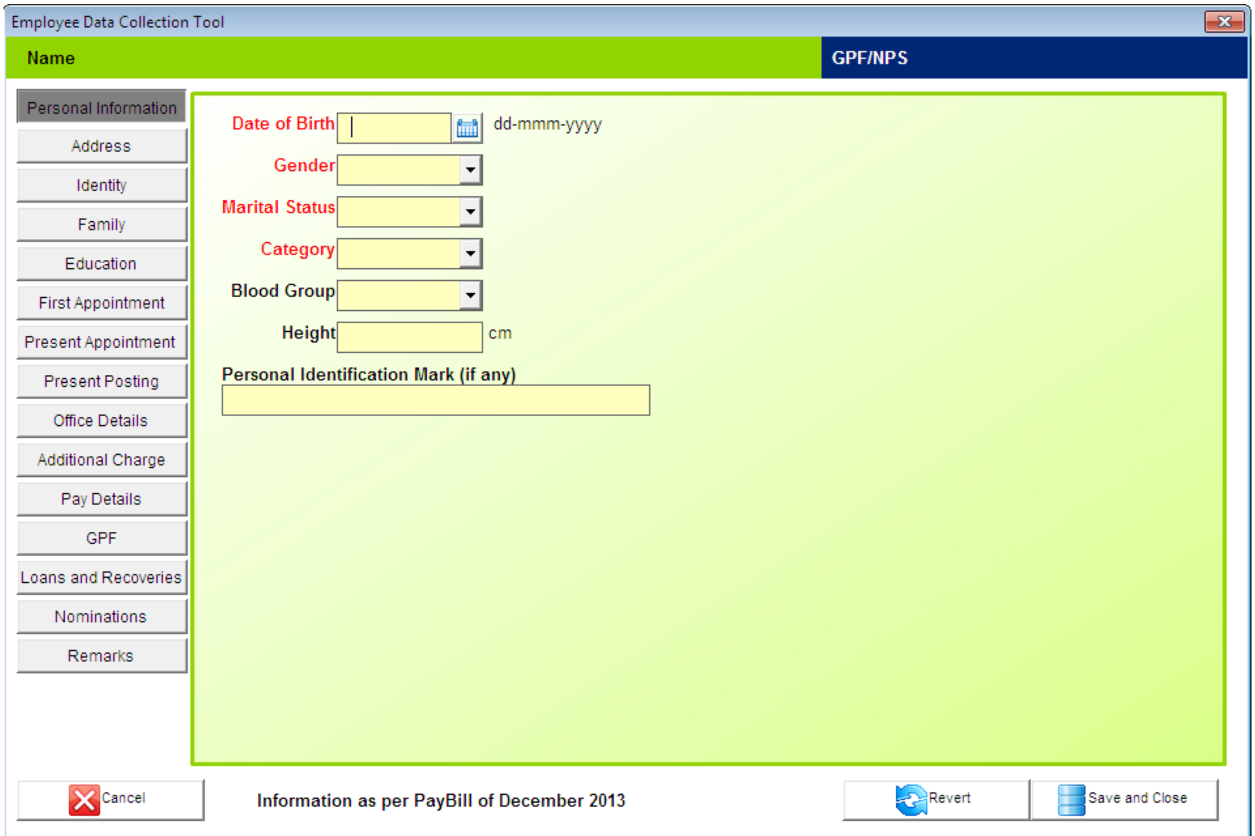
The New Employee will be shown as Incomplete in the Dashboard.



Before entering further details of each employee please enter the name of all employees under you in 'Add New Employee' screen

After names of all employees are added, DOUBLE click on each Employee name to open the Details Form and enter the data as described in next sections.

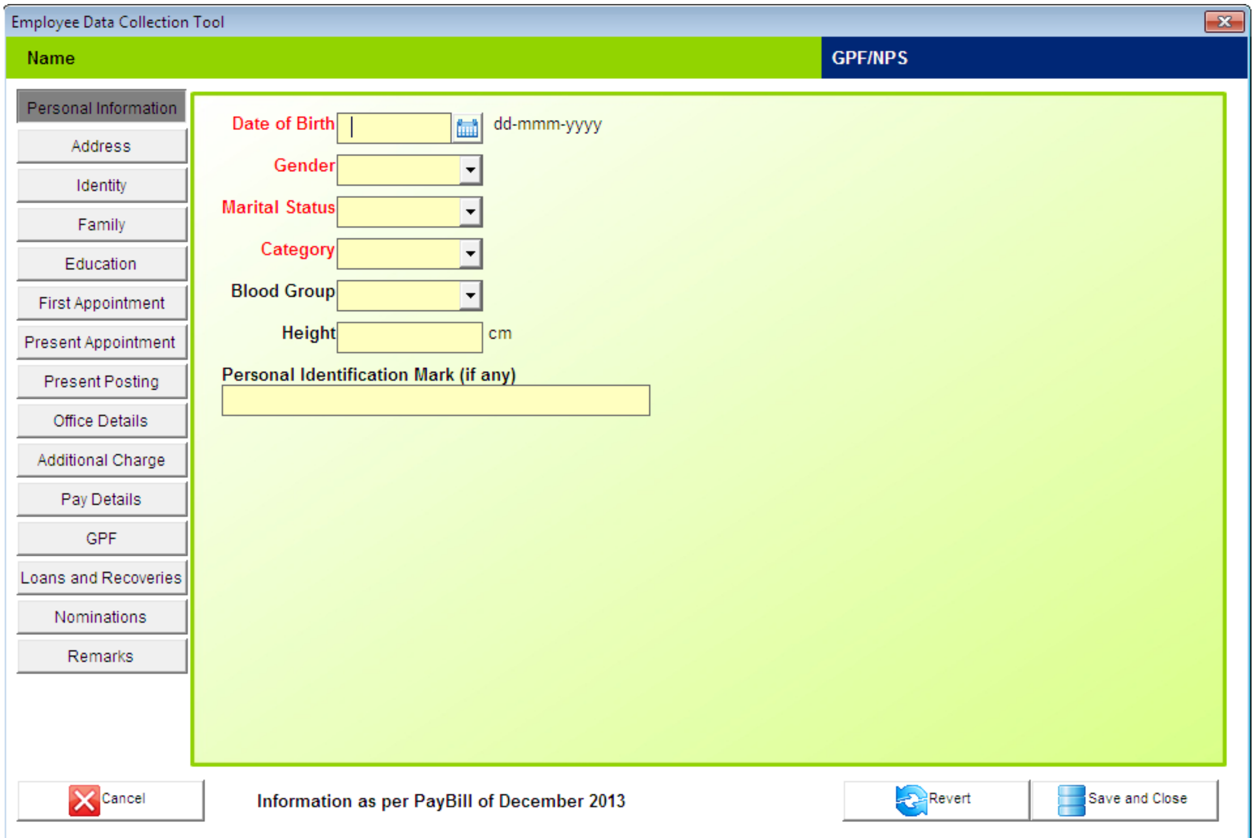
Details Form



1. There are 16 Tabs out of which 14 Tabs are for entering detailed information of the Employee. The last Tab is for Remarks.
2. Instructions for filling each tab are also given in each Tab.
3. **All fields in "Red" are Mandatory.**
4. **The employee data provided in the tool should be entered as per PayBill of December 2013**
5. Only after data for All Mandatory fields have been entered, the employee will show in the Complete List on the Dashboard.

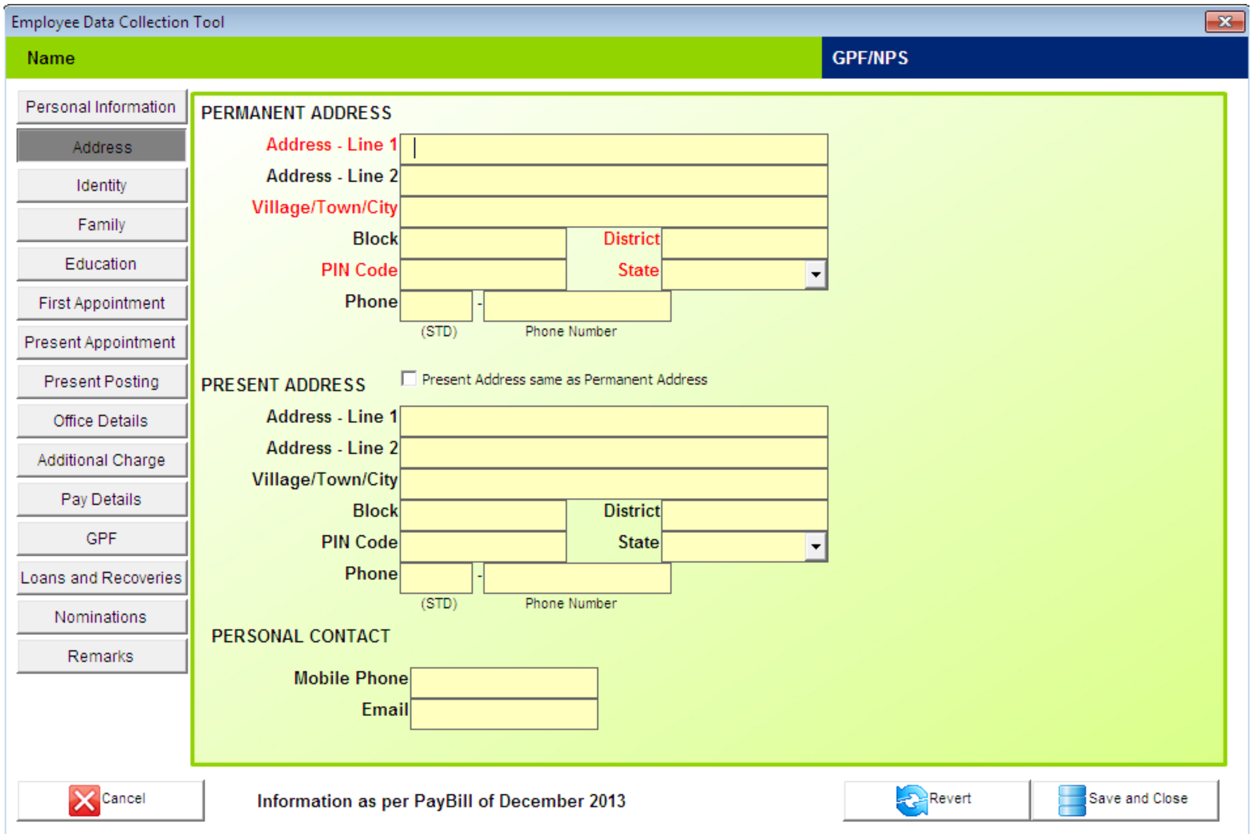
THE EMPLOYEE SALARY/PAY DATA SHOULD BE ENTERED AS PER PAYBILL OF DECEMBER 2013

Personal Information



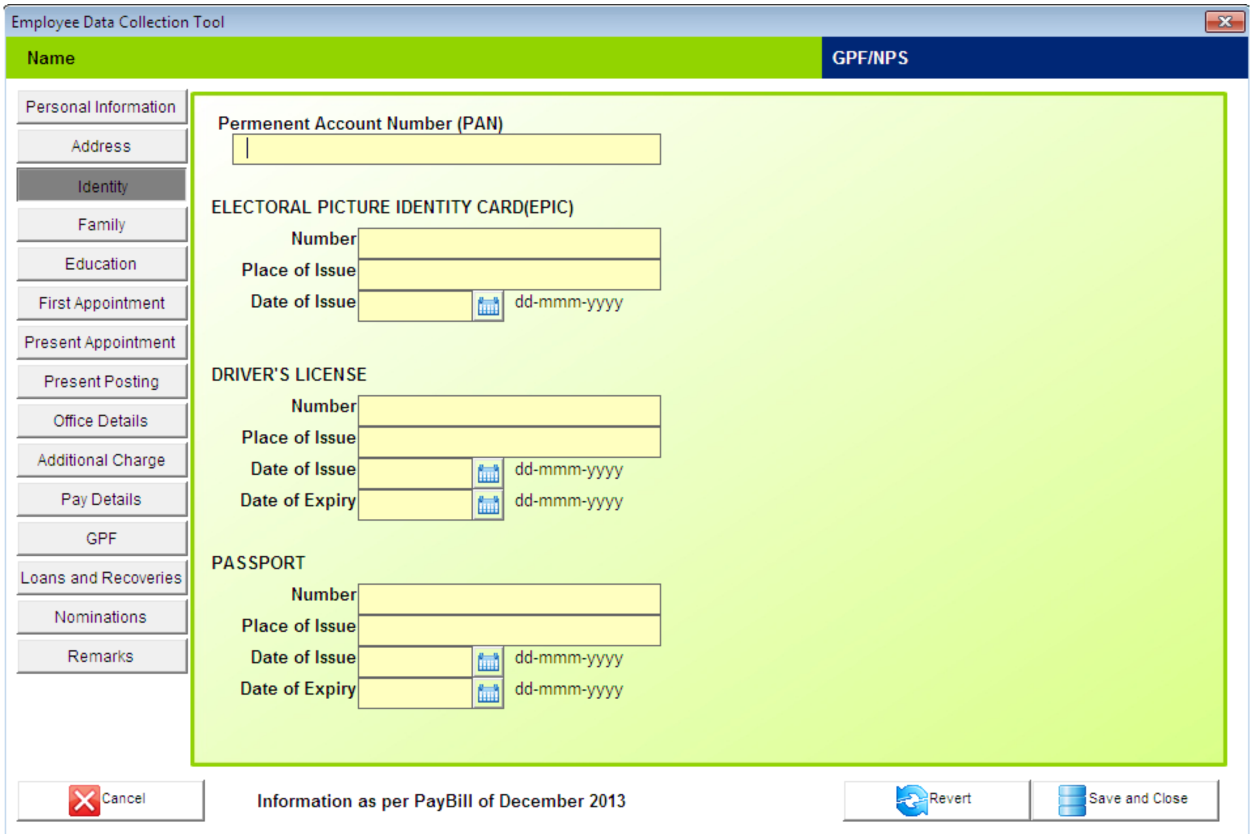
1. **Date of Birth**
    1.1. Click on the "Calendar" Button to open Date Picker.
    1.2. Use the dropdown list to select Month and Year.
    1.3. Click on the Date and it will fill up the field.
2. **Gender**
    2.1. Choose Gender from the list.
3. **Marital Status**
    3.1. Choose Marital Status from the list.
4. **Category**
    4.1. Choose Category from the list.
5. **Blood Group**
    5.1. Choose Blood Group from the list.
6. **Height**
    6.1. Input Height of the employee in centimeters.
7. **Personal Identification Marks**
    7.1. Input personal identification Marks

Address



1. **Permanent Address**
   1.1. Enter Permanent address of the Employee as per the fields.
   1.2. Choose State from the Dropdown list.
2. **Present Address**
   2.1. Enter Present address of the Employee as per the fields
   2.2. If the Present Address of the Employee is same as the Permanent Address, click on the box next to "Present Address" for a tick mark. The Permanent Address will be copied automatically.
3. **Personal Contact**
   3.1. Enter personal mobile of the employee.
   3.2. Enter email id of the employee.

Identity



1. **Permanent Account Number**
    1.1. Enter the Permanent Account Number (PAN) of the employee
2. **Electoral Picture Identity Card (EPIC)**
    2.1. Number
        2.1.1. Enter the EPIC number.
        2.1.2. Ensure the EPIC number is correctly entered
    2.2. Place of Issue
        2.2.1. Enter the place of issue of Electoral Picture Identity Card
    2.3. Date of Issue
        2.3.1. To input date into any of the fields, click on the “Calendar” Button next to it to open Date Picker.
        2.3.2. Use the dropdown list to select Day, Month and Year.
        2.3.3. Click on “OK” and it will fill up the field.
3. **Driver’s License**
    3.1. Number
        3.1.1. Enter the Driver’s License number.
        3.1.2. Ensure the Driver’s License number is correctly entered
    3.2. Place of Issue
        3.2.1. Enter the place of issue of Driver’s License

3.3. Date of Issue and Date of Expiry

3.3.1. To input date into any of the fields, click on the "Calendar" Button next to it to open Date Picker.

3.3.2. Use the dropdown list to select Day, Month and Year.

3.3.3. Click on "OK" and it will fill up the field

4. Passport

4.1. Number

4.1.1. Enter the Passport number.

4.1.2. Ensure the Passport number is correctly entered

4.2. Place of Issue

4.2.1. Enter the place of issue of Passport

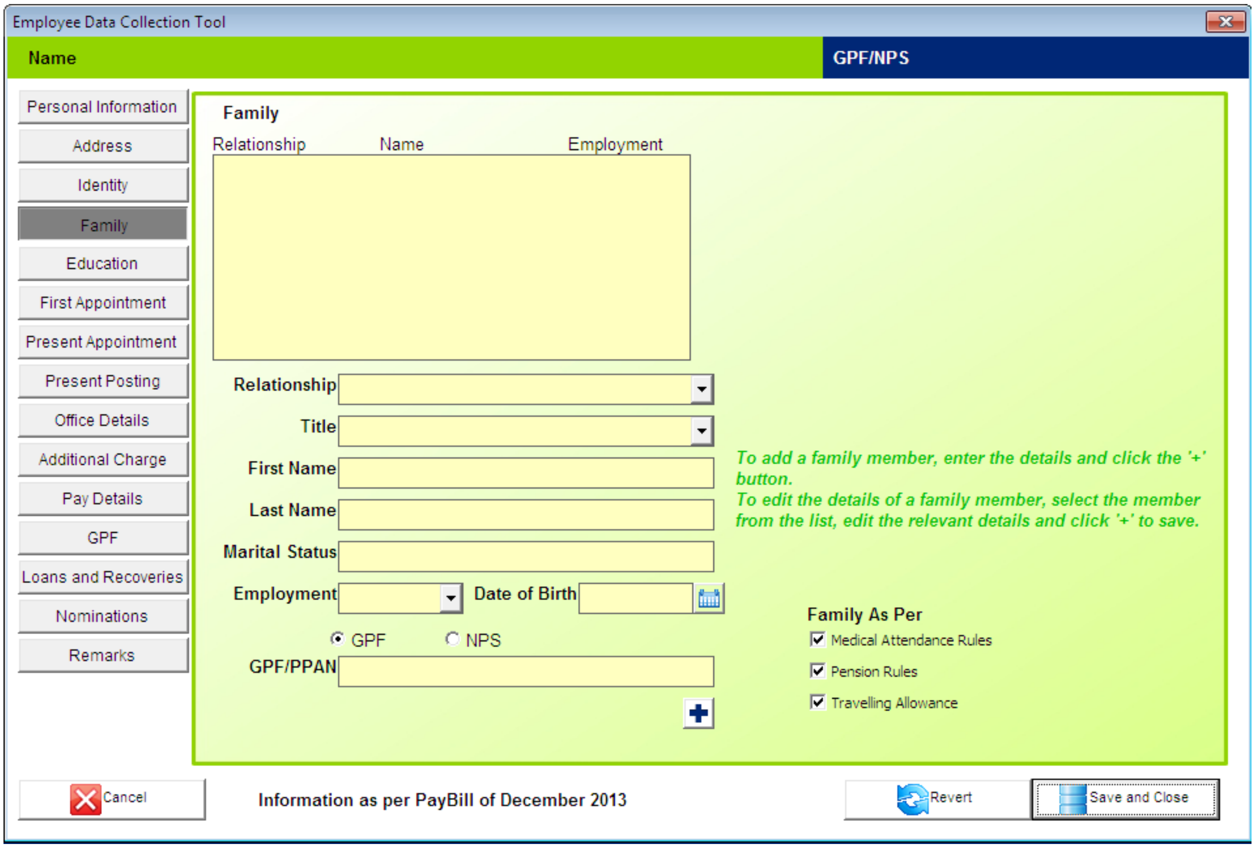
4.3. Date of Issue and Date of Expiry

4.3.1. To input date into any of the fields, click on the "Calendar" Button next to it to open Date Picker.

4.3.2. Use the dropdown list to select Day, Month and Year.

4.3.3. Click on "OK" and it will fill up the field.

Family



1. **Relationship**
    1.1. Choose the relationship of the family member from the Dropdown List.
2. **Title**
    2.1. Choose the title of the family member from the Dropdown List.
3. **Name**
    3.1. Enter the First and Last name of the employee
4. **Marital Status**
    4.1. Type the marital status of the family member
    4.2. The valid options are: Married, Single, Divorced, Separated, Widowed.
5. **Employment**
    5.1. Choose Employment category of the family member from the Dropdown List.
6. **Date of Birth**
    6.1. Click on the “Calendar” Button to open Date Picker.
    6.2. Use the dropdown list to select Year, Month and Date and Click on the “OK”
7. **GPF/ NPS**
    7.1. Click on the button beside GPF OR NPF (as applicable) and provide the GPF OR NPS number (as applicable) of the family member if he/ she is a government employee in the box below.
8. **Medical Attendance Rules**

8.1. Click on the Option box next to “Medical Attendance Rules” for a tick mark to indicate that the person is identified as Family Member as per Medical Attendance Rules

9. Pension Rules

9.1. Click on the Option box next to “Pension Rules” for a tick mark to indicate that the person is identified as Family Member as per Pension Rules

10. Traveling Allowance

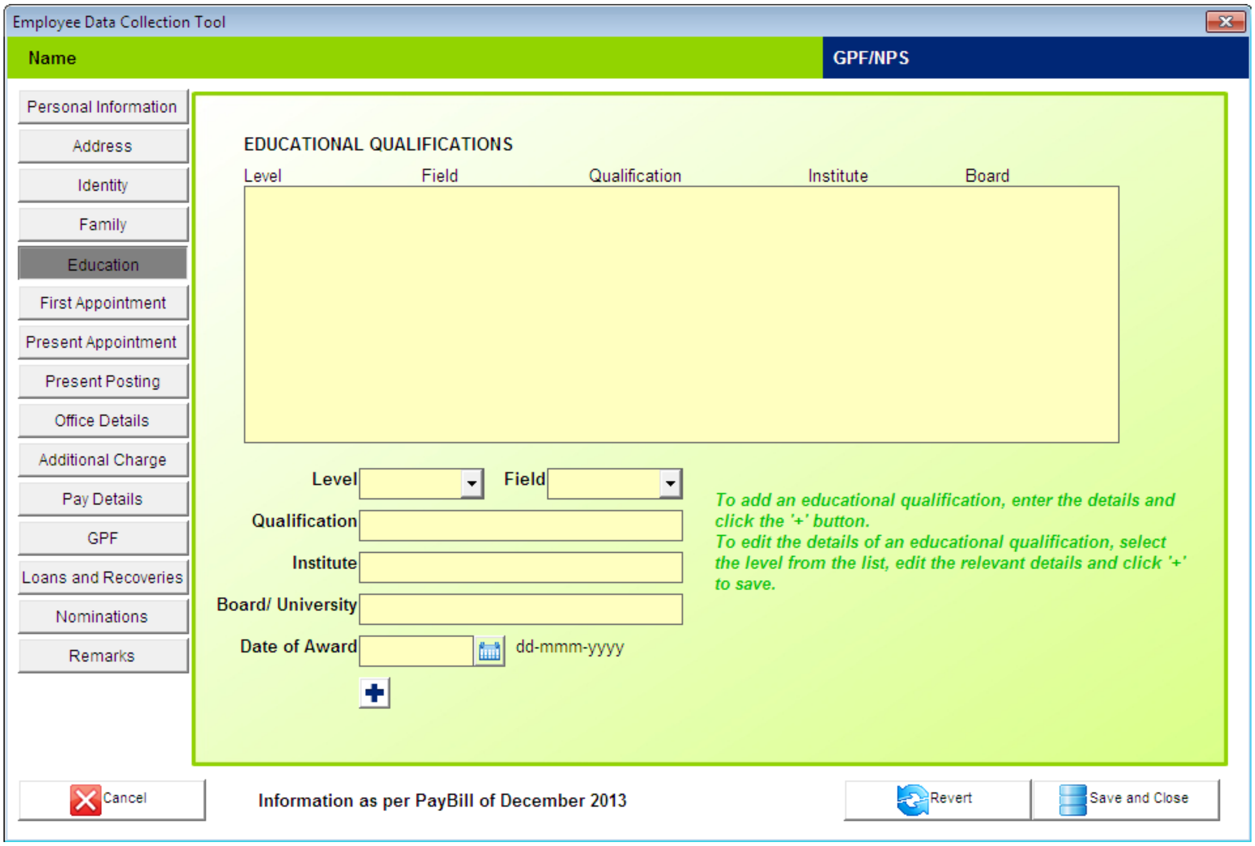
10.1. Click on the Option box next to “Traveling Allowance” for a tick mark to indicate that the person is identified as Family Member as per Traveling Allowance

11. Add more family members

11.1. Once the details of the family member are provided, Click on “+” to start entering data for another family member.

11.2. Repeat steps 1 to 10 for adding additional family members.

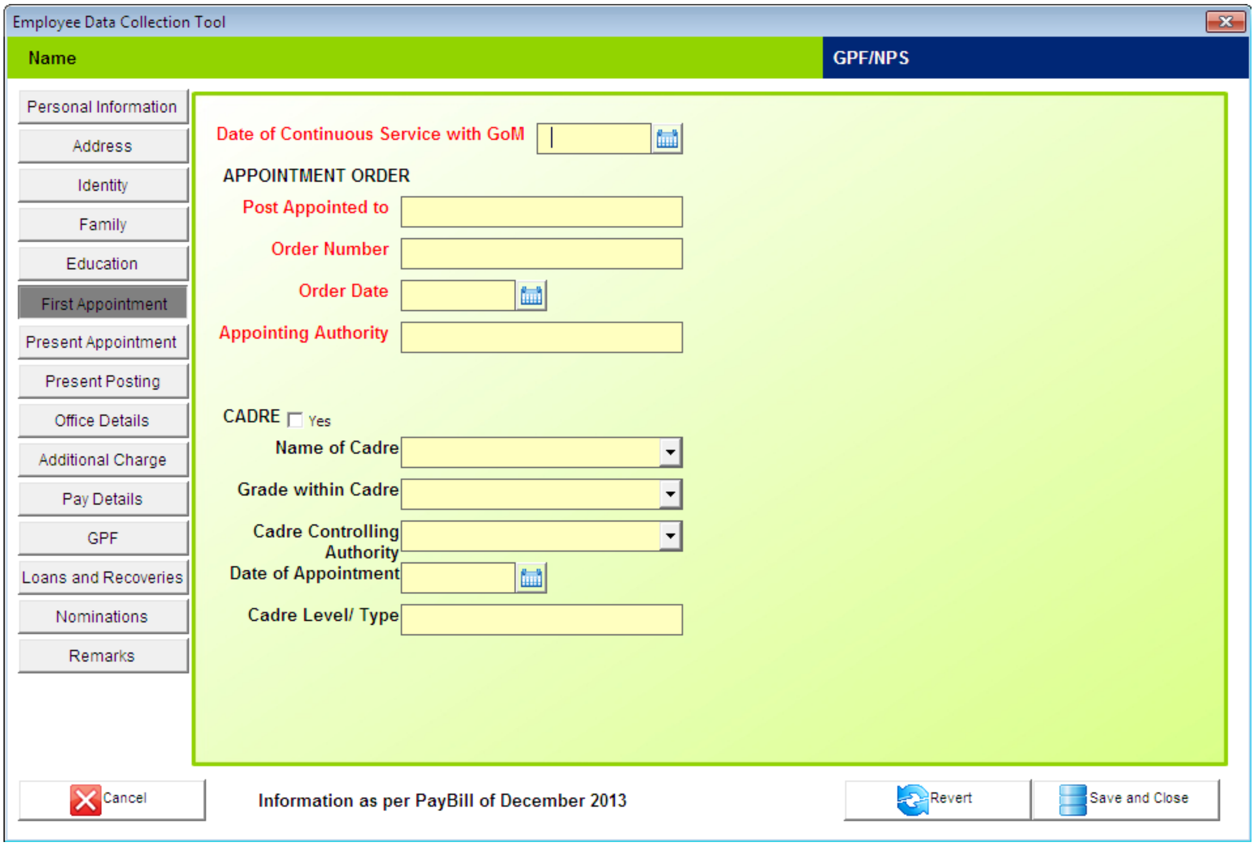
Education



NOTE: Each educational qualification of the employee has to be entered

1. **Level**
   1.1. Choose Level of the qualification from the Dropdown list
2. **Field**
   2.1. Choose the relevant field from the Dropdown list
3. **Institute**
   3.1. Enter Name of Institute
4. **Board/ University**
   4.1. Enter Name of Board/ University
5. **Date of Award**
   5.1. To enter Date of award, click on the “Calendar” Button next to it to open Date Picker
   5.2. Use the dropdown list to select Month and Year
   5.3. Click on “OK” and it will fill up the field
6. Click on the “+” button to add the Qualification to the List.
7. **Keep on repeating the above steps for each educational qualification**
8. For editing an educational information, click on specific qualification in the List on top of the screen to edit it.

First Appointment



1. **Date of Continuous service with Govt. of Mizoram**
   1.1. To enter Date of Passing, click on the "Calendar" Button next to it to open Date Picker
   1.2. Use the dropdown list to select Month and Year
   1.3. Click on "OK" and it will fill up the field
2. **Appointment Order**
   2.1. Enter the details in the Post appointed to
   2.2. Enter the order number
   2.3. Enter the order issue date
      2.3.1. To enter Date of Passing, click on the "Calendar" Button next to it to open Date Picker
      2.3.2. Use the dropdown list to select Month and Year
      2.3.3. Click on "OK" and it will fill up the field
   2.4. Enter the name of appointment authority
3. **Cadre**
   3.1. If First Appointment was under a Cadre, click on the checkbox next to "Cadre" to tick it.
   3.2. Name of the cadre
      3.2.1. Select the name of the cadre from the drop down list.
   3.3. Grade within Cadre
      3.3.1. Select the grade within the cadre from the drop down list.
   3.4. Cadre controlling authority

3.4.1. Select the Cadre controlling authority from the drop down list.

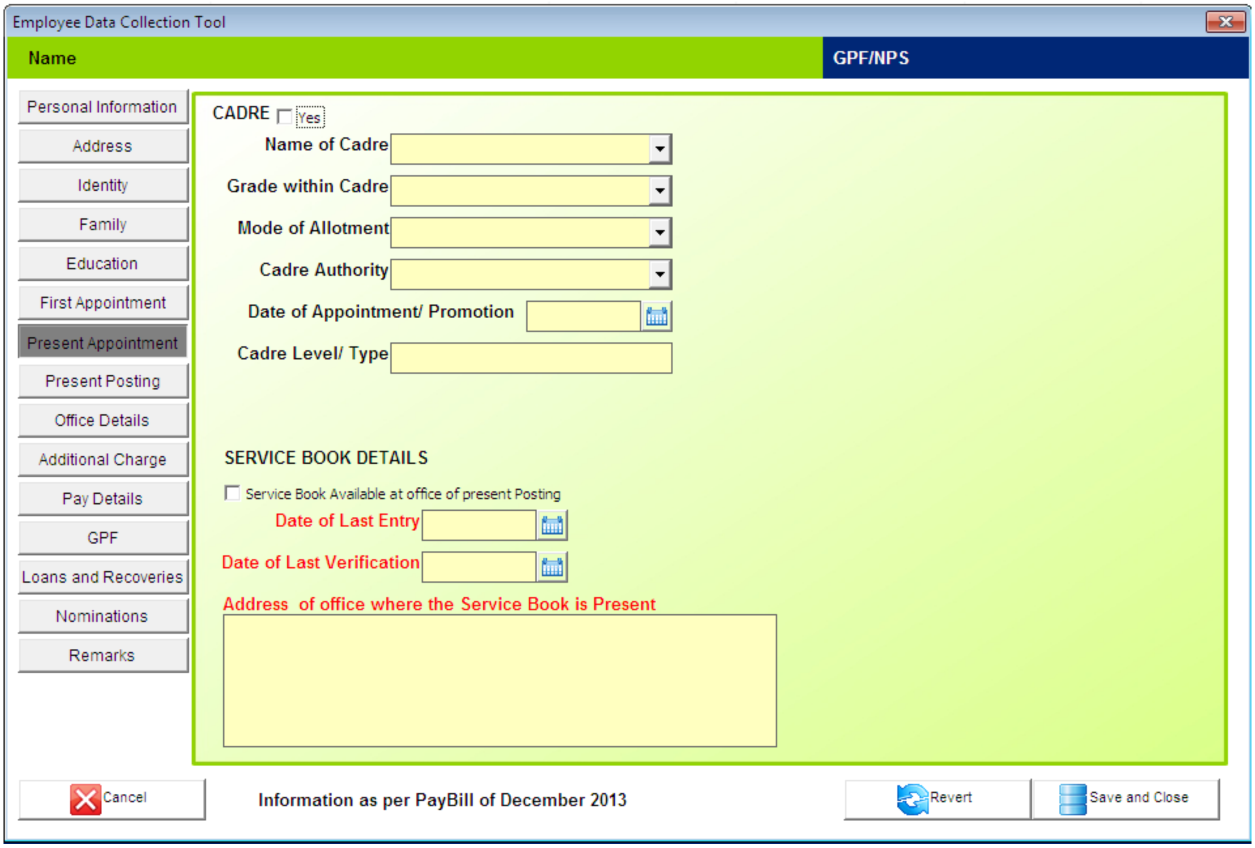
3.5. Date of Appointment

3.5.1. For entering date into specific field, click on the “Calendar” Button next to it to open Date Picker

3.5.2. Use the dropdown list to select Month and Year

3.5.3. Click on “OK” and it will fill up the field

Present Appointment



1. **Cadre**
   1.1. If present appointment is at Cadre level, click on the Checkbox next to "Cadre" to tick it.
2. **Name of the Cadre**
   2.1. Select the Name of the Cadre from the drop down list
3. **Grade within the Cadre**
   3.1. Select the Grade within the Cadre from the drop down list
4. **Mode of Allotment**
   4.1. Select the Mode of allotment from the dropdown list.
5. **Cadre Authority**
   5.1. Select the Cadre Authority from the dropdown list.
6. **Date of appointment/ promotion**
   6.1. Click on the Calendar button to input date of appointment/ promotion.
   6.2. Use the dropdown list to select Month and Year
   6.3. Click on "OK" and it will fill up the field
7. **Service book details**
   7.1. If the service book is available in the office of present posting, click on the checkbox to tick it.
8. **Date of last entry**
   8.1. To enter date of last entry in the Service Book, click on the corresponding "Calendar" button to open the date picker.

8.2. Use the dropdown list to select Month and Year

8.3. Click on "OK" and it will fill up the Date of Last Entry.

9. Date of last verification

9.1. To enter date of last verification of the Service Book, click on the corresponding "Calendar" button to open the date picker.

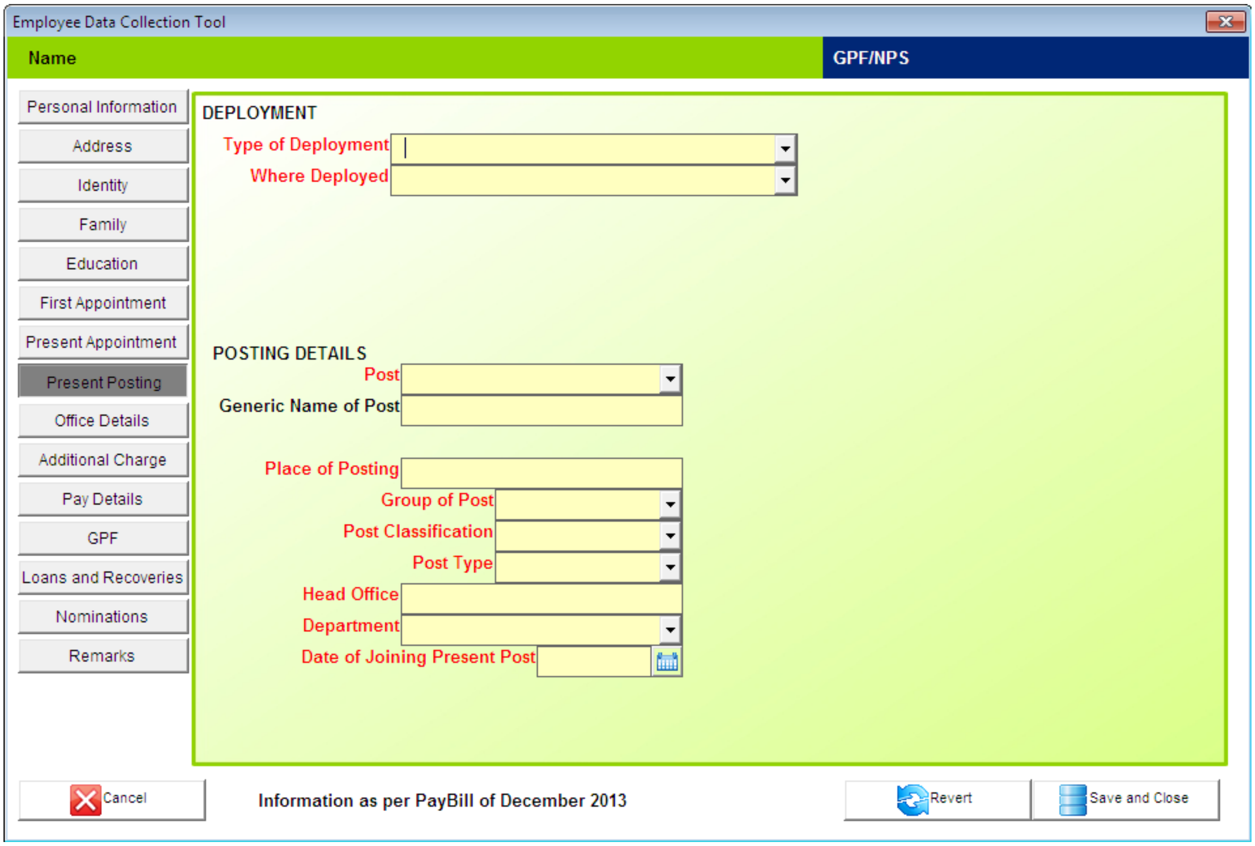
9.2. Use the dropdown list to select Month and Year

9.3. Click on "OK" it will fill up the Date of Last Verification.

10. Address of the office where the Service Book is present

10.1. Enter the address of the office where the Service Book is present in the text box.

Present Posting



1. **Deployment**
   - **1.1. Type of Deployment**
     - 1.1.1.Choose the type of deployment from the dropdown box
   - **1.2. Where Deployed**
     - 1.2.1.Choose the type of deployment office from the dropdown list.
2. **Posting Details**
   - **2.1. Post**
     - 2.1.1.Choose the Present Post from the dropdown list.
   - **2.2. Generic name of the post**
     - 2.2.1.Enter the generic name of the post, if any.
   - **2.3. Place of posting**
     - 2.3.1.Enter name of the place of present posting.
   - **2.4. Group of Post**
     - 2.4.1.Select the group of post from the dropdown lists.
   - **2.5. Post Classification**
     - 2.5.1.Select the classification of post from the dropdown lists.
   - **2.6. Post Type**
     - 2.6.1.Select the type of post from the dropdown lists.
   - **2.7. Head office**

2.7.1. Enter Head Office of the Post.

2.8. Department

2.8.1. Choose the Department from the dropdown list.

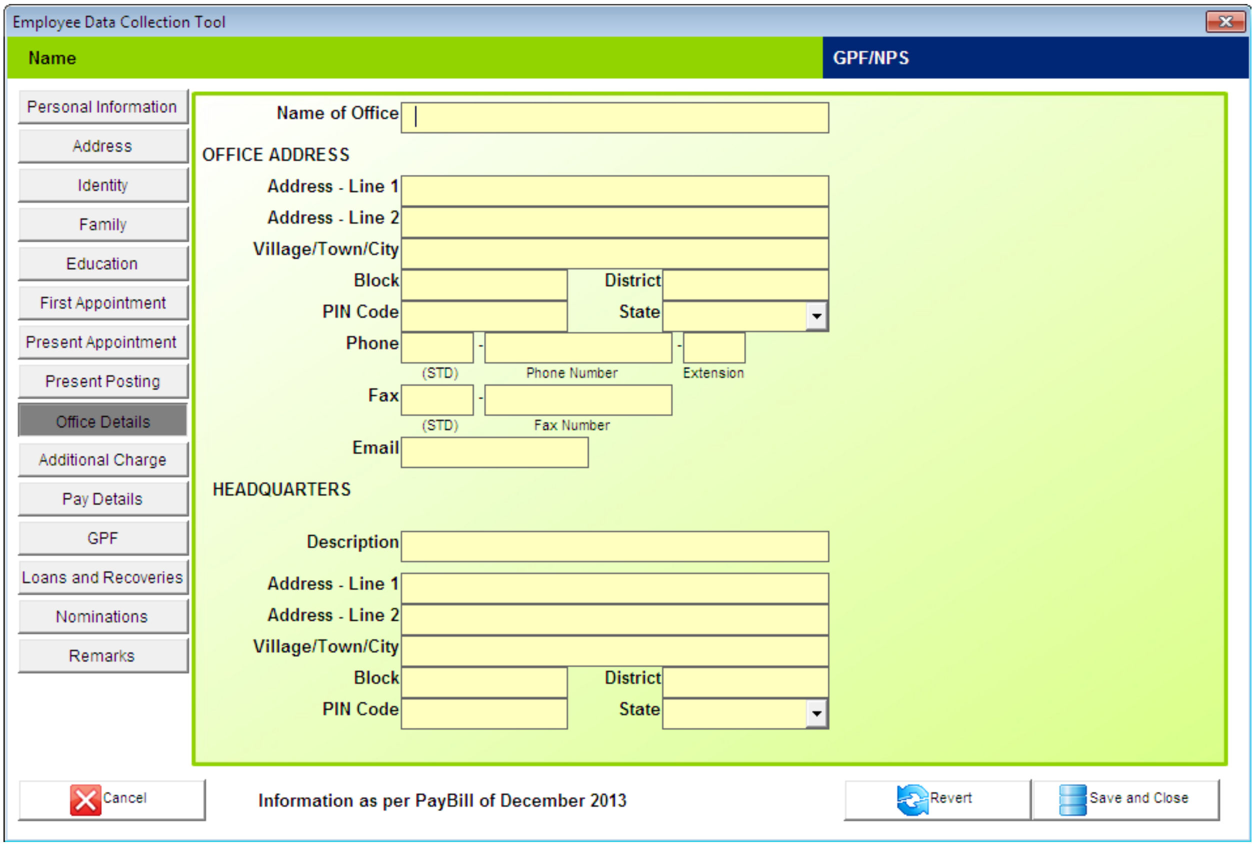
2.9. Date of Joining the present post

2.9.1. To enter the Date of Joining the present post click on the “Calendar” button to open the date picker.

2.9.2. Use the dropdown list to select Month and Year

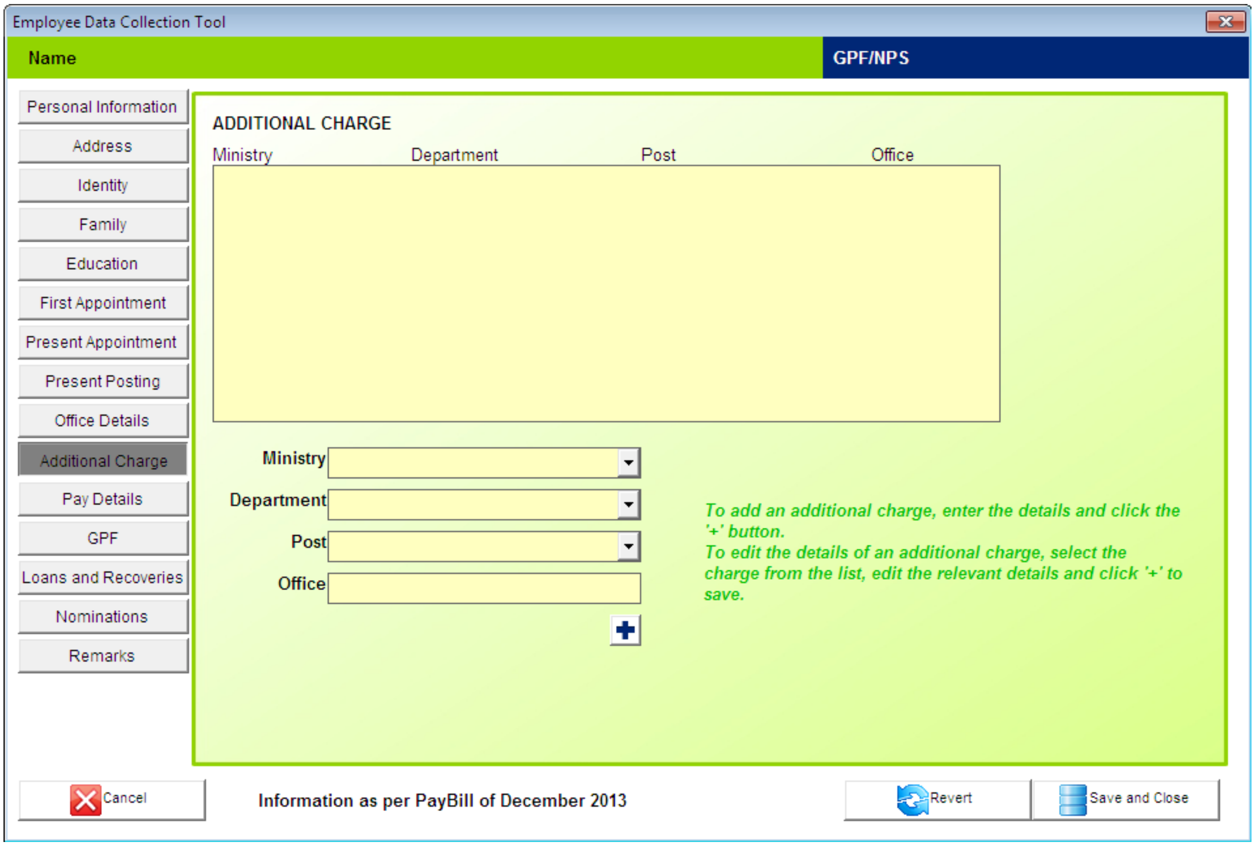
2.9.3. Click on “OK” and it will fill up the Date of Joining the present post.

Office Details



1. **Name of the Office**
   1.1. Enter Name of the Office where currently posted
2. **Office Address**
   2.1. Enter Address of the Office. Choose the State from the Dropdown list.
3. **Headquarters**
   3.1. Enter Address of the Headquarters of the Office. Choose the State from the Dropdown list.

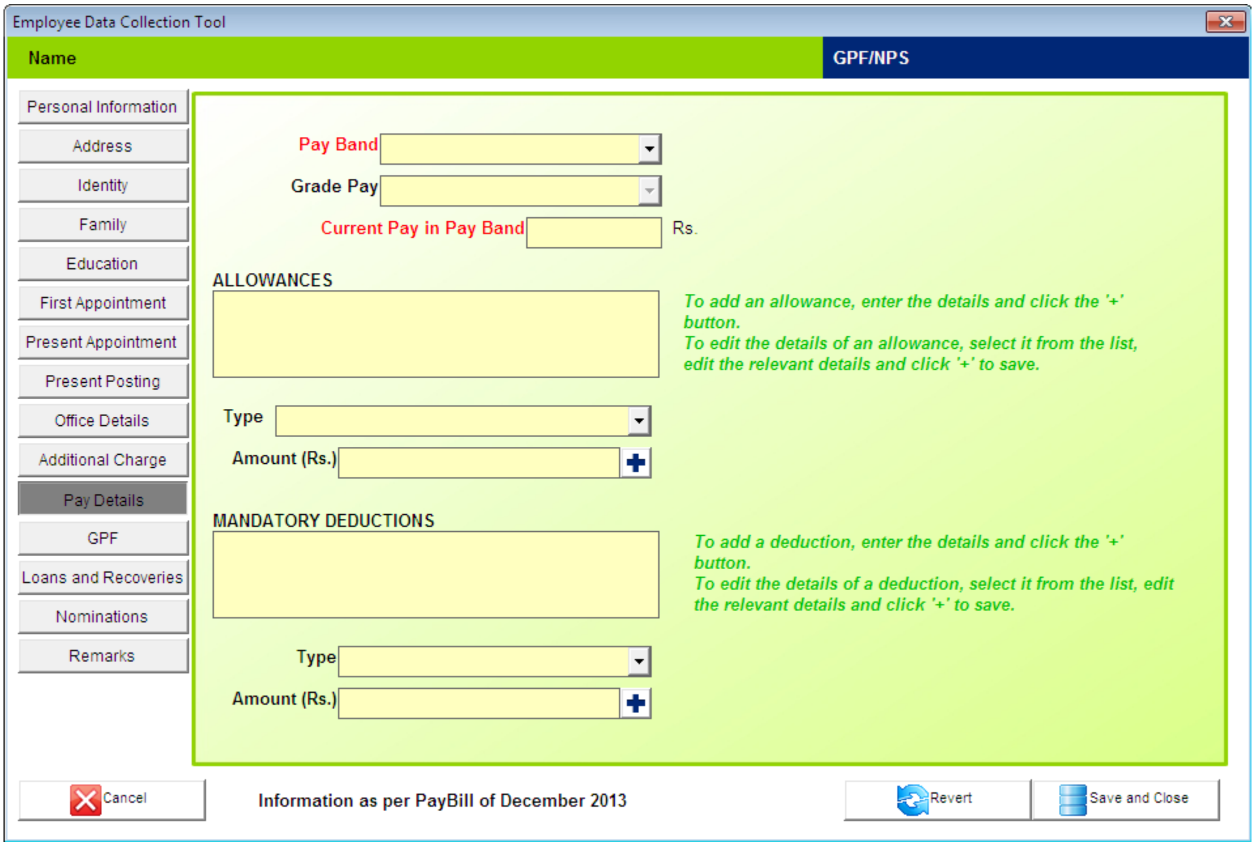
Additional Charge



1. **Ministry**
   1.1. To add a new Additional Charge, choose the Ministry from the Dropdown List.
2. **Department**
   2.1. Choose the Corresponding Department from the Dropdown List.
3. **Post**
   3.1. Choose the Post from the Dropdown List.
4. **Office**
   4.1. Enter Name of the Office.
5. Click the '+' Button to add it to the list.
6. **Repeat the above steps for as many additional charge as required**
7. All the Additional Charges once entered will be shown up in the List (Listed by Ministry).
8. To edit any specific entry, click it from the list and follow step 1 to 6.

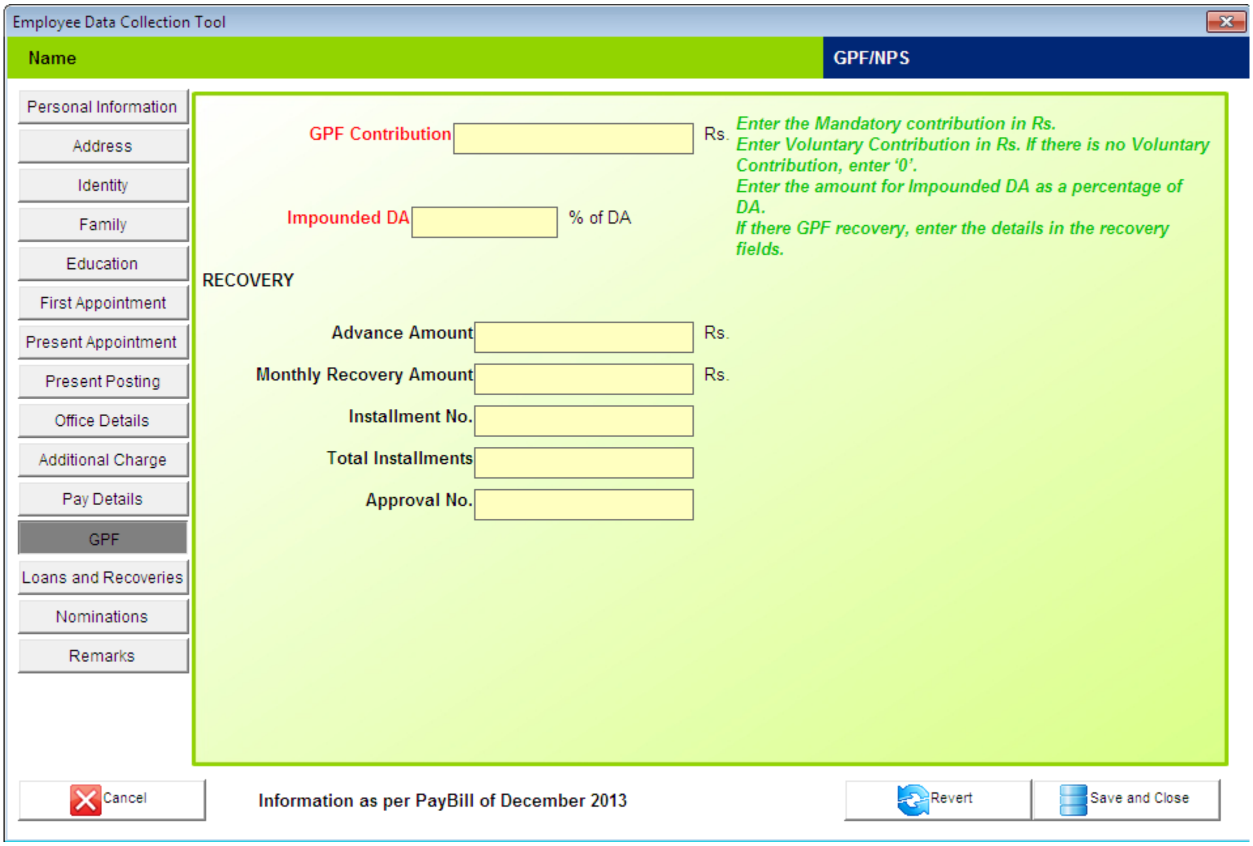
Pay Details

Enter the salary data as per Pay Bill for December 2013



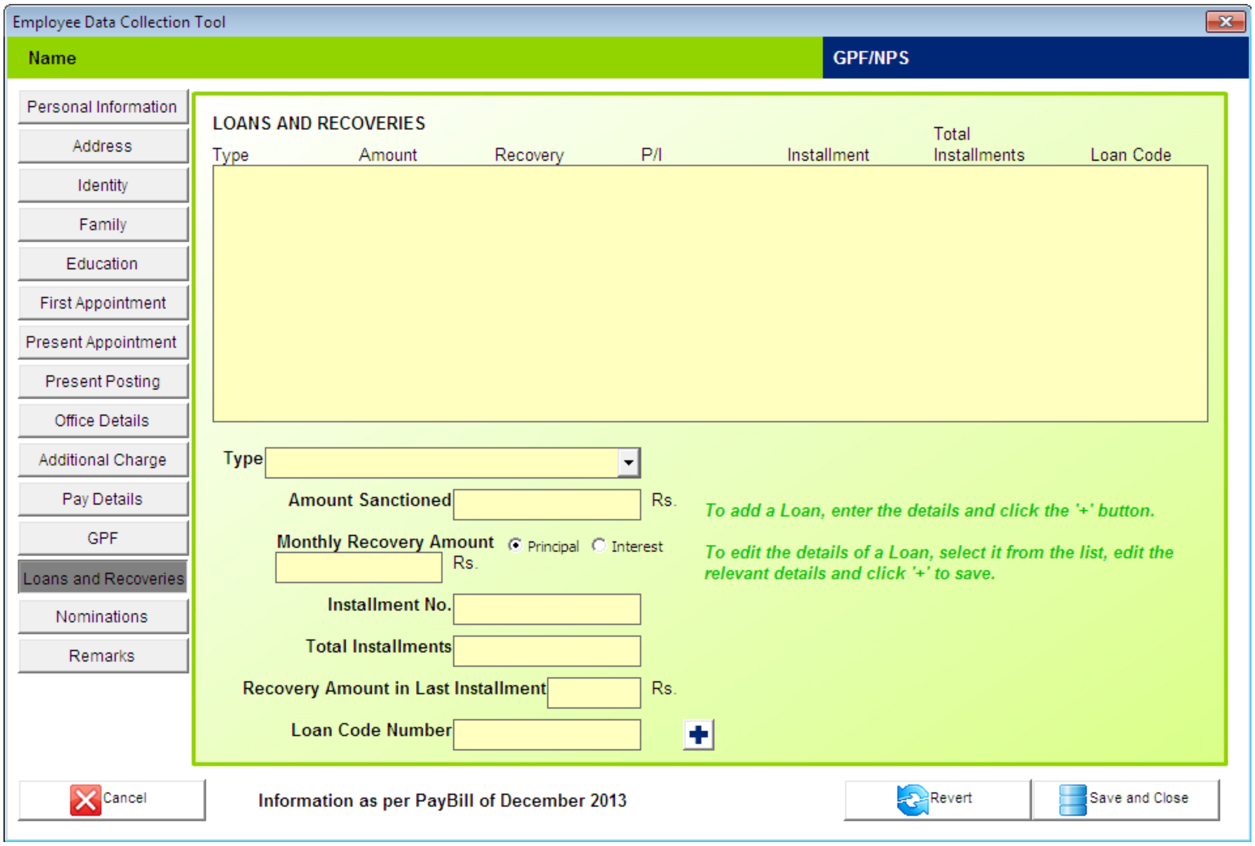
1. **Pay band**
   1.1. Choose the Pay Band from the Dropdown list.
2. **Grade Pay**
   2.1. Choose the Grade Pay from the Dropdown list.
3. **Current pay in Pay Band**
   3.1. Enter the current pay in Pay Band in Rs.
4. **Allowances**
   4.1. To add allowances choose the type of allowance from the dropdown list
   4.2. Enter the Allowance amount and click the '+' button to add it to the Allowances List.
   4.3. **Repeat the above steps for as many Allowances as required**
   4.4. To edit an Allowance, click it from the list and change following steps 4.1 to 4.3.
5. **Deductions**
   5.1. To add deductions choose it from the dropdown list
   5.2. Enter the deduction and click the '+' button to add it to the Deductions List.
   5.3. **Repeat the above steps for as many Deductions as required**
   5.4. To edit a Deduction, click it from the list and change following step 5.1 to 5.3.

GPF



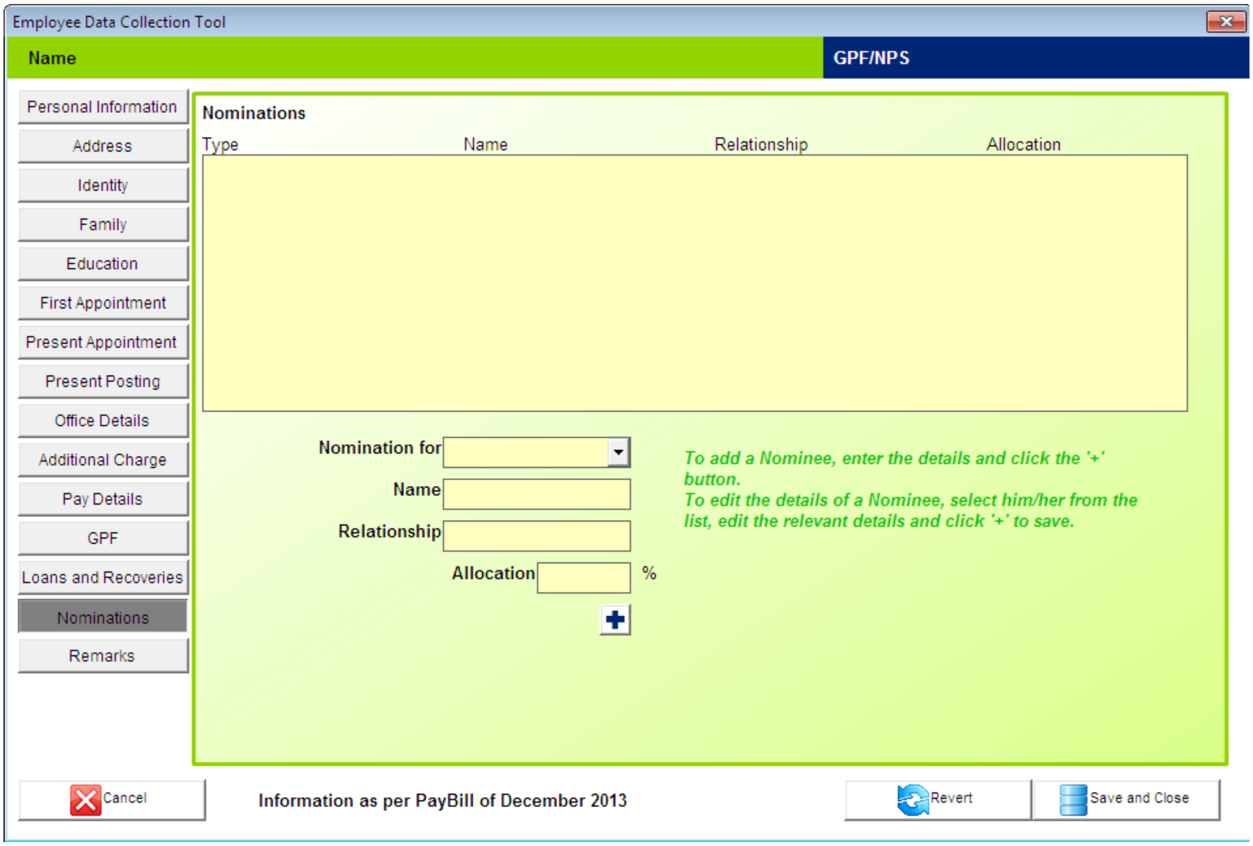
1. **GPF Contribution**
   1.1. Enter the GPF contribution in Rs.
2. **Impounded DA**
   2.1. Enter the amount for Impounded DA as a percentage of DA.
3. **Recovery**
   If there GPF recovery, enter the details in the recovery fields.
   3.1. Enter the advance amount in Rs.
   3.2. Enter the monthly recovery amount in Rs.
   3.3. Enter the current installment number
   3.4. Enter the total number of installments
   3.5. Enter the approval number

Loans and Recoveries



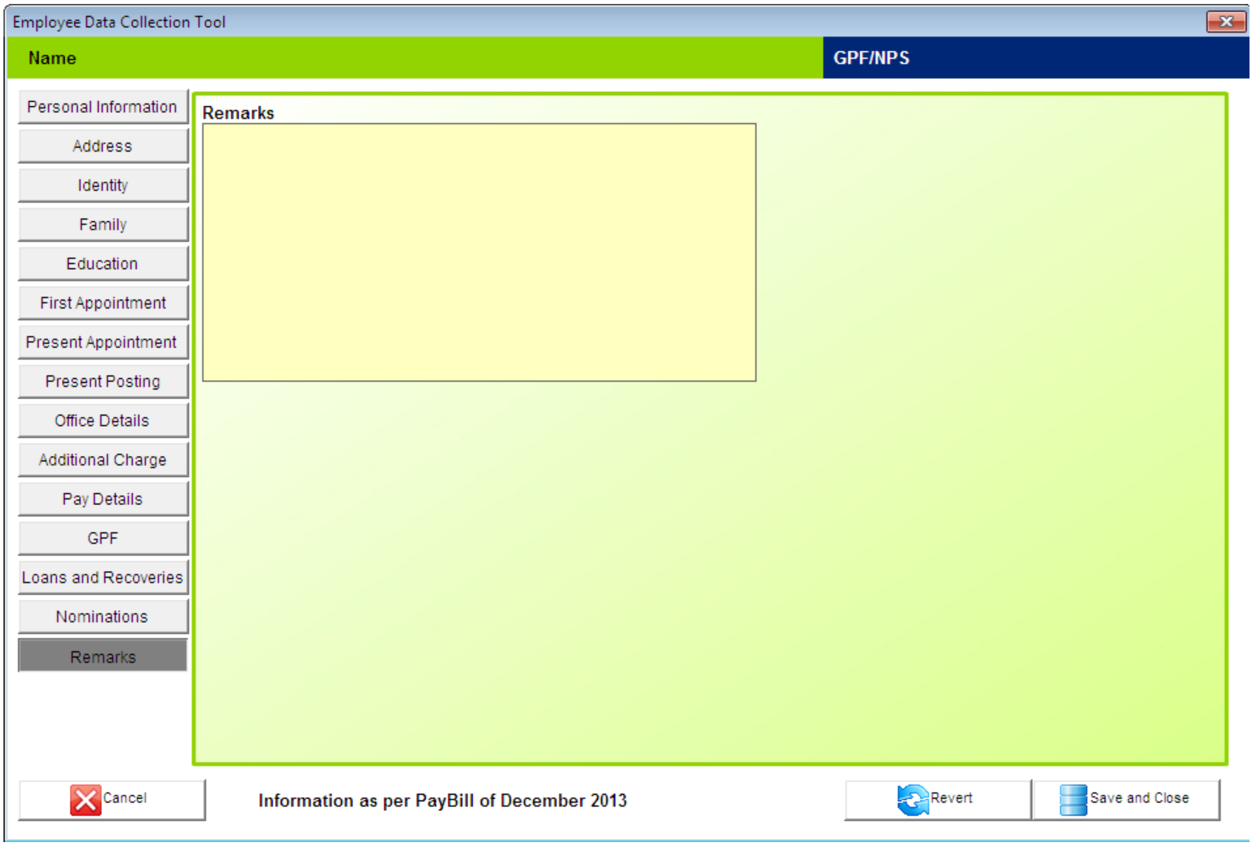
1. **Loan type**
   1.1. Choose the type of Loan from the Dropdown list.
2. **Amount Sanctioned**
   2.1. Enter the Loan Sanctioned Amount in Rs.
3. **Monthly Recovery Amount**
   3.1. For the Monthly Recovery Amount, click the button to indicate whether principal and interest
   3.2. Enter the Monthly Recovery Amount in Rs. in the box below.
4. **Installment Number**
   4.1. Enter the present installment no.
5. **Total Installments**
   5.1. Enter the total number of installments.
6. **Recovery amount in Last installment**
   6.1. Enter the recovery amount in Last installment in Rs.
7. **Loan Code Number**
   7.1. Enter the Loan Code Number.
8. Click on the '+' to add the Loans list.
9. **Repeat the above steps for as many Loans as required**
10. To edit specific entry, choose it from the List and follow steps 1-8.

Nominations



1. **Nominations For field**
    1.1. Schemes provided in the dropdown list include: GPF, DCRG, MGEGIS, NPS
    1.2. Choose the type of employee benefit scheme from the Dropdown list.
2. **Name**
    2.1. Enter the name of the nominee.
3. **Relationship**
    3.1. Enter the relationship of the nominee
4. **Allocation**
    4.1. Enter the allocation percentage for the nominee.
5. Click on the '+' to add the nominee list.
6. **Repeat the above steps for as many Nominees as required**
7. To edit specific entry, choose it from the List and follow steps 1-5.

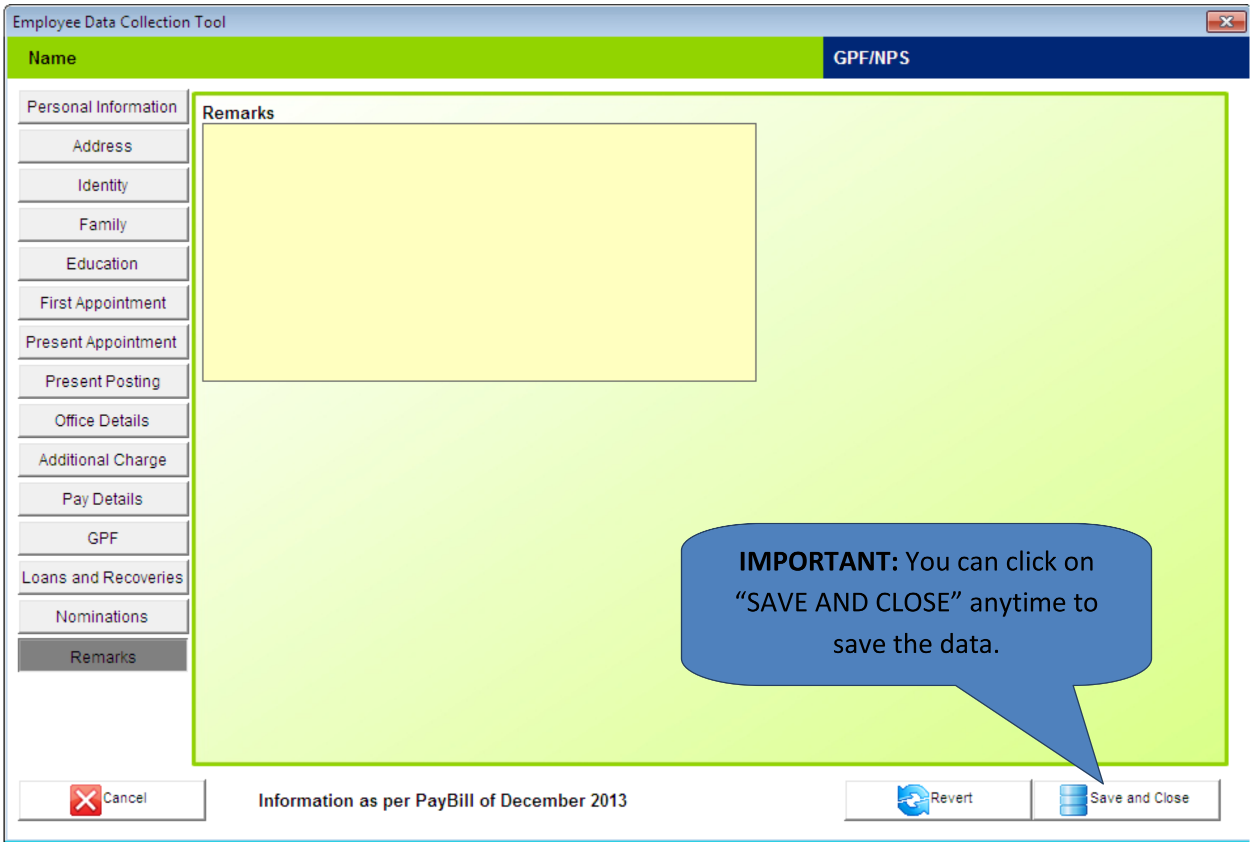
Remarks



1. Remarks

1.1. Enter any additional information/ remarks related to the employee.

Save and Close



1. **Save and Close**
   1.1. Click on Save and Close button as shown in the figure above.
   1.2. If the mandatory fields are not entered, the employee name will be shown in the Incomplete list on the Dashboard.
   1.3. Only after data for all mandatory fields have been entered, the employee will show in the Complete List on the Dashboard.
   1.4. **While entering data you can go from one Tab to another without pressing this button** (data will be automatically saved)

Report Generation

1. Generating Report

1.1. On completion of filling the details in all the fields, the employee name is shown in the "Completed" table (the employee name moves to the left side of the dashboard).

1.2. Select the employee name

1.2.1.Select the employee name for generating the report (the selected employee name will be highlighted in blue as shown in the picture below)

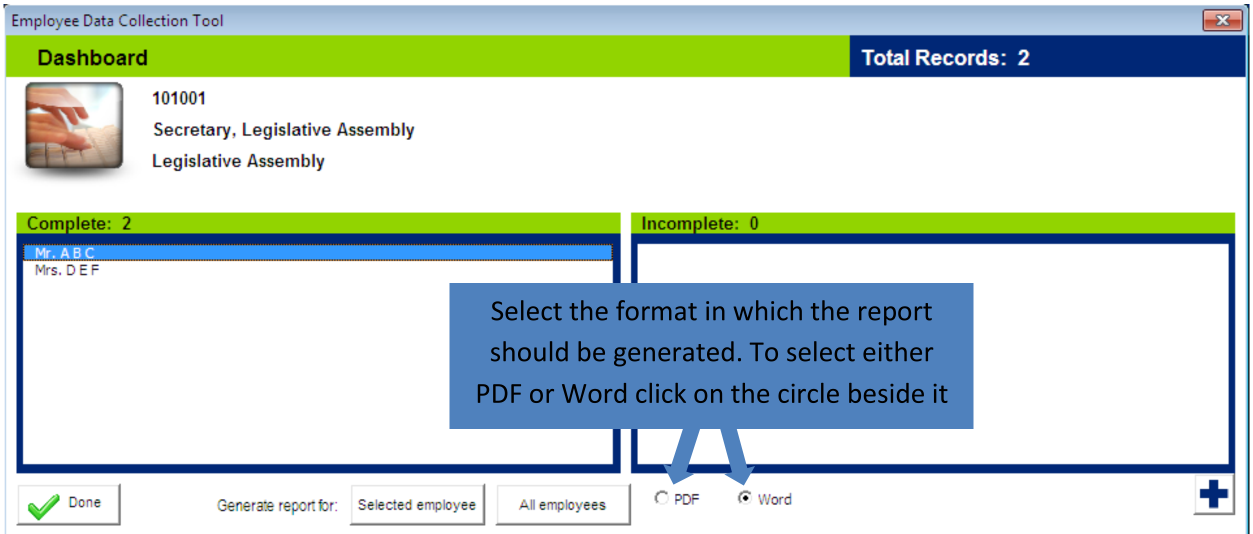
1.3. Selecting the report format

1.3.1. Select the format in which you want the report to be generated

1.3.2. The Employee Data Collection tool can generate the report in two formats:

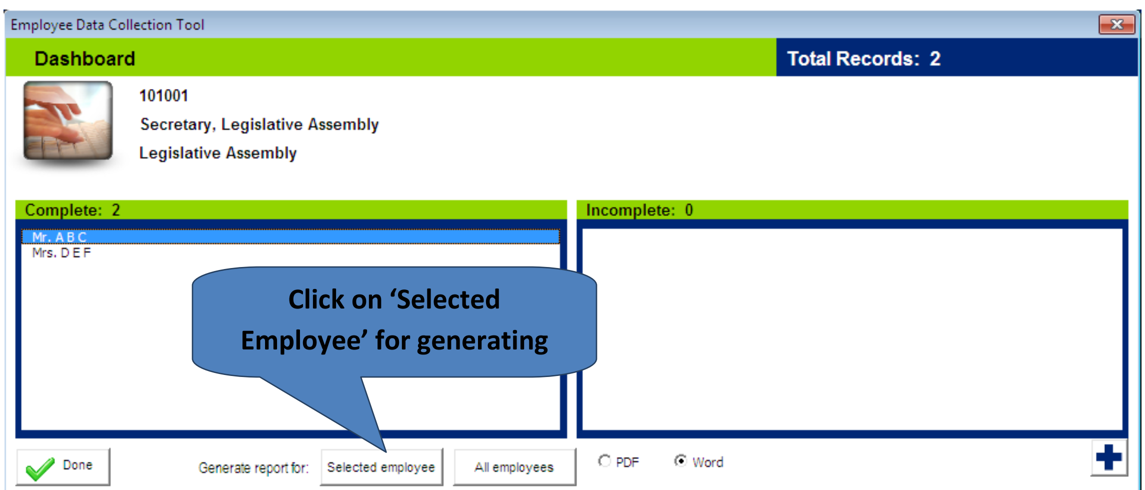
a. PDF format (.pdf)

b. MS-Word format (.doc/.docx)



1.4. Generate report for Selected Employee:

1.4.1. Click on "**Selected Employee**" button for generating the report.



1.5. Saving the report:

1.5.1. Saving the report in MS-Word format

1.5.1.1. On clicking the "Selected Employee" button

1.5.1.2. A Ms-Word file will be opened with the employee details

1.5.1.3. Save the the file name of MS-Word document as **Employee Data Collection Tool_Employee Name**

For example, if the employee name is ABC, enter the file name as **Employee Data Collection Tool_ABC**

1.5.1.4. Make sure that there is no similar file name already available in the computer

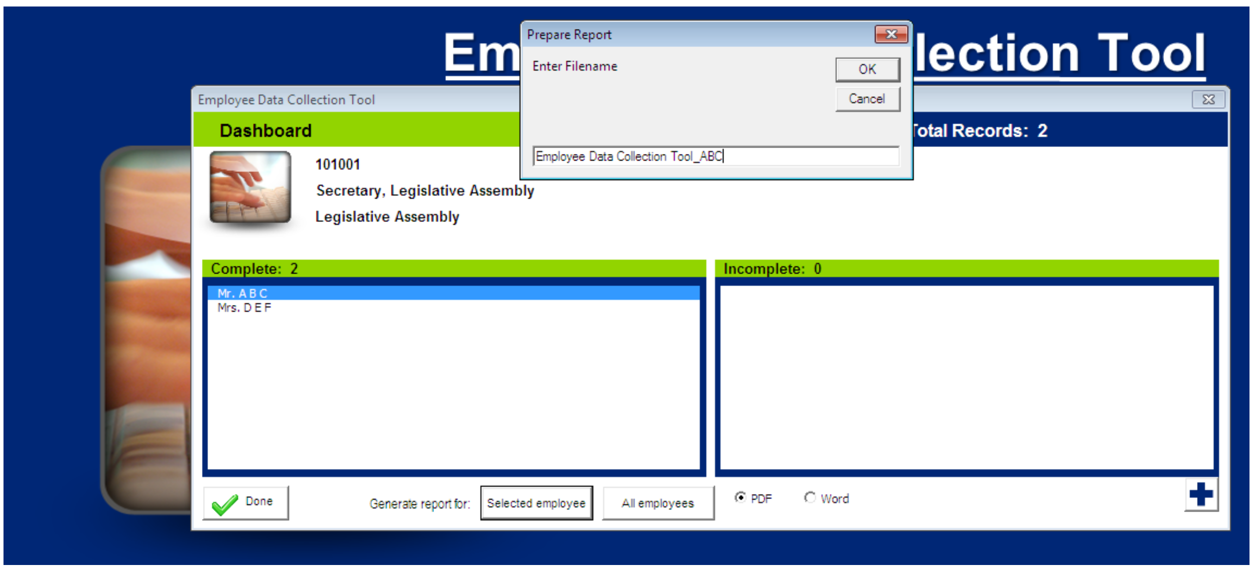
1.5.2. Saving the report in PDF format

1.5.2.1. On clicking the "Selected Employee" button, an option box is diplayed in which the file name has to be entered

1.5.2.2. Please enter the file name as **Employee Data Collection Tool_Employee Name**
For example, if the employee name is ABC, enter the file name **Employee Data Collection Tool_ABC**

1.5.2.3. Make sure that there is no similar file name already available in the computer

1.5.2.4. Click "OK" button to generate the employee report



1.6. Generate report for all employees:

1.6.1.If you want to generate the report for all employees at once, follow the steps given below:

1.6.1.1. Select the format in which you want the report to be generated (PDf or Word)

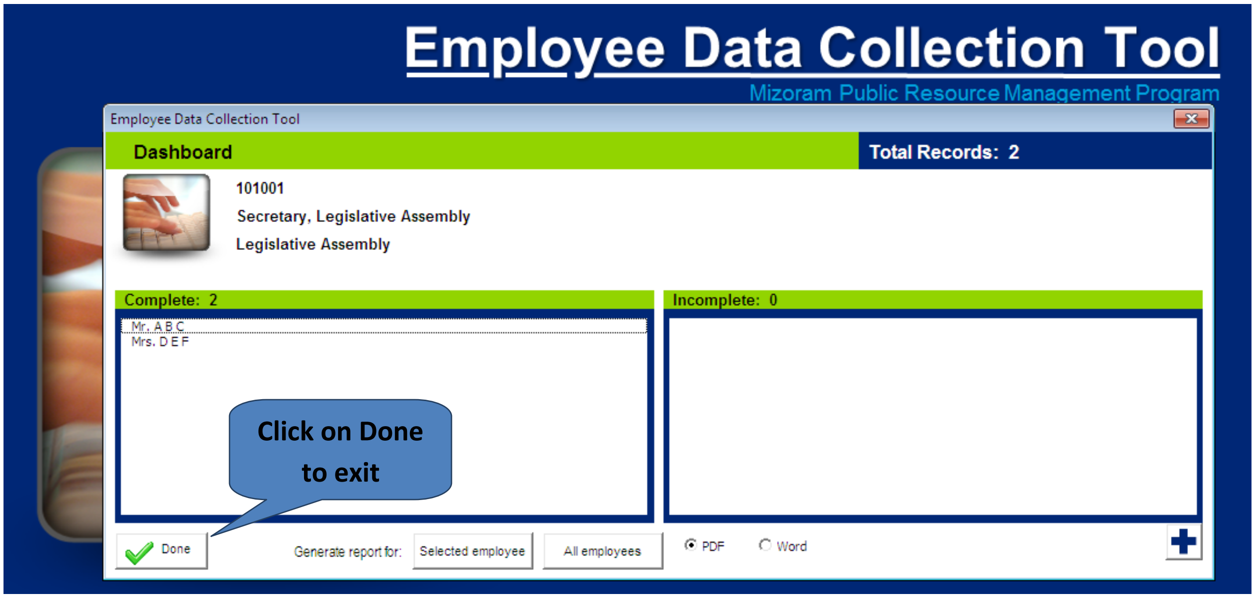
1.6.1.2. Click on "**All Employees**" button for generating all employee reports

1.6.1.3. Save the file name as Employee Data Collection Tool_DDO Code
For example, if the DDO code is 100001, enter the file name as Employee Data Collection Tool_100001

IMPORTANT:

- **The report will be generated in PDF format by default.**
- **It is recommended to select PDF format for generating the report.**
- **Word format should be selected only if you are using MS-Office 2007 or older versions**

Exit, Save and Close



1. Exit

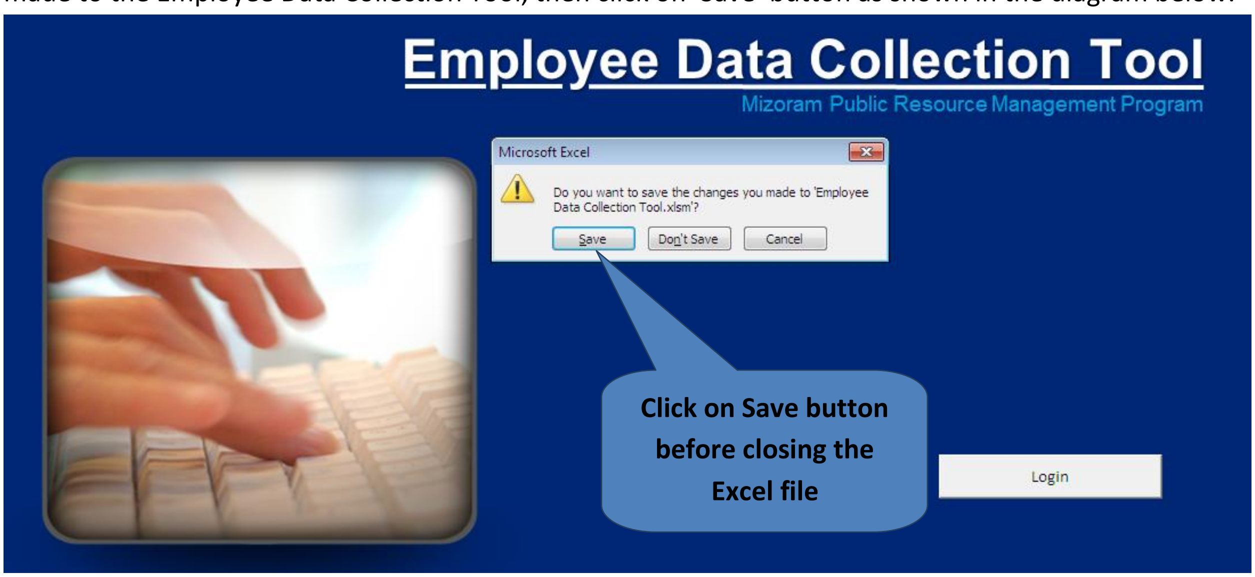
To exit from the Employee Data Collection Tool, click on the RED X on the top right hand of the screen as shown above.

2. Save the excel file

Press 'Ctrl' and 'S' buttons together on the keyboard to save the excel file (OR) Click on File on the top left corner of the excel file and click on 'Save'.

3. Close the Employee Data Collection Tool

Click on the Cross (X) button to close the excel file. Incase a window appears for saving the changes made to the Employee Data Collection Tool, then click on 'Save' button as shown in the diagram below.



Methodology for Employee Data Collection

Data Entry and Data Collection Monitoring

- DDOs enters employee data in the tool
- DDOs will take print out details of each employee from the tool and give it to the respective employee for verification and accuracy of information.
- Respective employee will check and sign on the document as a proof of their verification and correctness of the data.
- Based on the comments from the employee, if necessary, modifications will be done by the DDO in the Employee Data Collection tool
- After completion of data entry (including necessary modifications) the DDO will send back the filled up MS-Excel with employee data along with hard copy of the reports duly signed by the employees to the respective TOs.
- TOs in turn will send the excel file and documents from all DDOs under him/ her to the Nodal Officer in FMU.
- Nodal officers in the respective department will keep track of the DDOs from whom data has been received.
- Any DDO, who sends incomplete data of any employee, shall be requested to resend such data after ensuring completeness.

Data Handover and Migration

- All the excel files received will be handed over to the selected IT Consultant for uploading in the payroll database at the time of implementation of the Payroll system.
- After the data in the payroll database is verified with the details of each employee in the signed document, the signed documents will be sent back to respective DDOs

Roles of stakeholders in Employee Data Collection

FMU	• FMU provides support and technical assistance for filling the employee data • Coordinate with HODs and TOs for regular updates and issue resolution • Ensure smooth operation of Employee Data Collection exercise
HEAD OF THE DEPARTMENT	• HOD is responsible for leading the Employee Data Collection exercise at the department level • HOD receives EDC tool and instruction manual from FMU for distribution to the DDOs • Coordinates and communicates information to the DDOs
TREASURY OFFICER	• TO is responsible for supporting the DDOs in Employee Data Collection • Provides support to the DDOs in clarifying their doubts in entering data in the tool and passing the unresolved queries to the FMU for further clarification • Responsible for collecting the filled excel file and documents from DDOs and submit to FMU

DDOs	• DDOs are responsible for entering the data in Employee Data Collection tool • Coordinate with the employees for verifying the accuracy of data • Get the report signed by the employee • Submit the completely filled excel file and documents to TOs for further submission

Contact Details for further assistance

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