POORNIMA
INSTITUTE OF ENGINEERING & TECHNOLOGY

# E- Governance Policy

ISI - 2, Poornima Marg, Sitapura, Jaipur, Rajasthan 302022

**Policy Statement**

The primary objective of Poornima Institute of Engineering and Technology, Jaipur is to incorporate e-governance into its operations, transactions, and services through the adoption of an e-governance policy. This policy aims to improve efficiency, effectiveness, transparency, and accountability in various departments of the institution, including Administration, Finance and Accounting, Admissions, Student Support, and Examination. To achieve this goal, the institute intends to digitize its administrative processes, making them more efficient and accessible. This will involve the implementation of online systems for tasks such as leave applications, attendance tracking, and employee performance evaluations. By digitizing these processes, the institute aims to reduce paperwork, eliminate manual errors, and enhance overall efficiency. Additionally, the Finance and Accounting department will utilize online payment systems, electronic invoicing, and digital record-keeping to simplify financial transactions and ensure transparency and accountability. The Admissions department will also benefit from e-governance, as the institute plans to introduce an online application system, streamlining the admissions process for prospective students. Furthermore, an online counseling system will be implemented to provide guidance and support to students during the admissions process. In terms of Student Support, the institute will establish an online portal where students can access academic resources, submit assignments, and communicate with faculty members. This centralized platform will enhance the learning experience and provide students with easy access to important information and support services. Lastly, the Examination department will undergo a digital transformation with the introduction of online examination systems. This comprehensive approach to e-governance will revolutionize the institute's operations and ensure a seamless and efficient experience for all stakeholders.

Overall, the implementation of e-governance in various departments of Poornima Institute of Engineering and Technology, Jaipur aims to revolutionize the institution's operations, transactions, and services. By embracing digital technologies and streamlining processes, the institute aims to enhance efficiency, effectiveness, transparency, and accountability, ultimately providing a better experience for its stakeholders.

**Objectives:**

- Streamline various operational aspects of the institution by implementing a comprehensive and user-friendly Enterprise Resource Planning (ERP) solution.
- Embrace E-governance across all institutional functions to enhance efficiency and simplify the governance system both internally and externally.
- Foster transparency and accountability in all institute operations to promote a culture of trust and responsibility.
- Establish a paperless environment within the institute to reduce waste and promote sustainability.
- Enhance accessibility and speed of information retrieval to ensure easy and quick access to relevant data.

**Action Plan**

1. **Administration:**

- The office will utilize ERP software to monitor the regular operation of all service units, ensuring efficient management.

- Attendance Management Software will be used by faculty and staff to accurately record and manage attendance, as well as internal assessments.
- Real-time information sharing with parents, students, and staff regarding absenteeism, academic performance, holidays, and other important updates will be facilitated through digital messaging services such as SMS and email.
- The administrative office will employ powerful Excel and File Management System Tools to effectively manage the database.
- Embrace paperless transactions by increasing the utilization of Google services, including Google Sheets for data collection, Google Docs for preparing notices and activity reports, and Google Forms for creating feedback forms.
- Communication with Governing Body members, teaching and non-teaching staff will be conducted via email by the administration.
- Administrative information, such as notices and circulars, will be regularly published on the website and displayed digitally at strategic locations.
- Biometric attendance will be mandatory for all employees.
- A fully wireless workplace with 24x7 internet access and strategically placed CCTV cameras will ensure a secure environment.
- ICT will be implemented in all administrative functions and tasks, enhancing efficiency and productivity.

**2.Finance and Accounts:**

- The institution will utilize Tally software, SHARP, and ERP (TCS-iON) for managing its accounting processes.
- All payments and transactions will be conducted online through various methods such as NEFT, RTGS, bank transfers, UPI, and more.
- It is recommended to acquire the latest versions of the software programs.
- Utilize software tools to generate profit and loss statements, balance sheets, and other financial reports.
- Tally software should be utilized for generating all analysis reports.
- Implement necessary security measures to ensure the confidentiality of transactions.
- Regularly provide training to both new and existing employees on the updated versions of the software.
- Employ an automated Payroll Management System to handle salary calculations, salary slips, and salary disbursements to bank accounts, TDS, Provident Fund, allowances, and other related areas.

**3.Student Admission and Support:**

The adherence to the rules and regulations of the Rajasthan Engineering Admission Process (REAP) is a fundamental principle upheld by the Poornima Institute of Engineering and Technology. The institute prides itself on its commitment to transparency, openness, and ethical practices throughout the admission procedure. To ensure that prospective students have access to comprehensive information, the institute has published a comprehensive brochure on its official website, elucidating the entire admission process. Additionally, an efficient Admission Portal is employed to manage various aspects of admissions, including the number of applicants per course, withdrawals, and fee submissions. Commencing the admission process necessitates the completion of a specific Online Application Form, which is conveniently accessible through an online software platform facilitated by the Admission Coordinator.

- Utilize an ERP system to effectively handle and organize all student information, encompassing course enrollment and fee submission.
- Consistently maintain and refresh the college website to ensure the prompt sharing and dissemination of real-time information, encompassing admission details and online transaction interfaces, among other relevant content.
- The designated Information and website committee is responsible for regularly updating the college website.
- Regularly publish informative updates on the Alumni Portal, providing relevant information about graduated students.
- During the admissions process, distribute a digital brochure, a captivating video teaser, and engaging social media posts that highlight comprehensive details about the courses, approved intake capacity, placement opportunities, and available amenities.

**4. Examination:**

- Implement ERP to manage the entire examination process.
- Make student examination records available online, with an interactive platform for students to check their internal evaluation and semester marks/grades and, if necessary, raise anomalies online.
- Maintain examination process compatibility with affiliating university regulations in terms of e-governance policy.

The Institute shall continuously review and update the approved policy and is committed to its implementation.

**5. Website:**

The institute established a website that will serve as a central hub of information, providing details about the institution, its activities, important announcements, and available courses. To ensure the smooth functioning of the website, the college will engage the services of a dedicated service provider or web designer. Additionally, training will be provided to the administrative and teaching staff to enable them to make necessary updates on the website. A Website Committee will be formed to oversee the administration of the college website, including the regular updating, maintenance, and overall functionality. The Committee will also be responsible for identifying and implementing any required changes to the website. The college aims to present itself as a vibrant and active institution through its website, and all important notifications will be promptly published on the site as soon as they are released.

**6. Conclusion:**

The successful implementation of this E-Governance Policy will enhance the overall efficiency, transparency, and accountability of governance processes at Poornima Institute of Engineering and Technology. By leveraging ICT effectively, PIET aims to create a digital ecosystem that empowers stakeholders and facilitates the achievement of its academic and administrative objectives.

**Annexure: ERP Manual**

**1. Introduction to ERP:**

Provide an overview of the Enterprise Resource Planning (ERP) system implemented at Poornima Institute of Engineering and Technology (PIET).

Explain the purpose and benefits of using ERP for integrating and automating various administrative and academic processes.

**2. Access and Authentication:**

Describe the process for accessing the ERP system, including login credentials and authentication methods.

Provide guidelines for maintaining the security of login credentials and reporting any suspicious activities.

**3. Navigation and User Interface:**

Explain the layout and navigation features of the ERP software, including menus, tabs, and search functions.

Provide screenshots and step-by-step instructions for navigating different modules and functionalities.

**4. Modules and Functionalities:**

Detail the various modules available in the ERP system, such as student information management, academic planning, finance, human resources, etc.

Describe the key functionalities of each module and how they contribute to streamlining institutional operations.

**5. Data Entry and Management:**

Provide guidelines for entering and updating data in the ERP system, including student records, course details, employee information, etc.

Explain data validation rules, error handling procedures, and best practices for maintaining data integrity.

**6. Reporting and Analytics:**

Explain how to generate reports and analyze data using the reporting tools available within the ERP system.

Provide examples of commonly used reports for monitoring academic performance, financial transactions, resource utilization, etc.

**7. Workflow and Approval Processes:**

Describe the workflow automation features of the ERP system for managing approval processes,

such as course registrations, leave requests, purchase orders, etc.
Outline the steps for initiating, routing, and tracking workflow tasks within the system.

**8. Troubleshooting and Support:**
Provide troubleshooting tips for common issues encountered while using the ERP system, such as system errors, data discrepancies, etc.
Explain how to contact the IT support team for assistance and escalate unresolved issues if necessary.

**9. Data Security and Privacy:**
Highlight the importance of safeguarding sensitive information stored in the ERP system and adhering to data security protocols.
Provide guidelines for user roles and permissions, data encryption, backup procedures, and compliance with data protection regulations.

**10. Updates and Maintenance:**
Explain the process for installing updates, patches, and enhancements to the ERP software to ensure optimal performance and functionality.
Provide information on scheduled maintenance activities and downtime notifications to minimize disruptions to system availability.

**11. Conclusion**:
Summarize the key points covered in the ERP manual and emphasize the importance of adhering to ERP policies and procedures for efficient institutional management.

**Note:** This enclosed ERP manual serves as a reference guide for users of the ERP system at Poornima Institute of Engineering and Technology. It should be regularly updated to reflect any changes or enhancements to the ERP software and related processes.

POORNIMA
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# TCS iON ERP MANUAL

## Session- 2023-24

ISI - 2, Poornima Marg, Sitapura, Jaipur, Rajasthan 302022
**Website: www.piet.poornima.org**

## Introduction:

The TCS-iON software, along with other software specifically designed to minimize manual labor and enhance transparency and efficiency, is employed as the ERP system at Poornima Institute of Engineering and Technology (PIET). This centralized system facilitates the efficient allocation of resources for faculty and students, ensuring the smooth functioning of the college.

### Modules available in the ERP software are as below:

- Module for Student Admissions
- Module for Academic Management
- Module for Student Support
- Module for Finance and Online Payments
- Module for Administration

### Objectives of the ERP System:

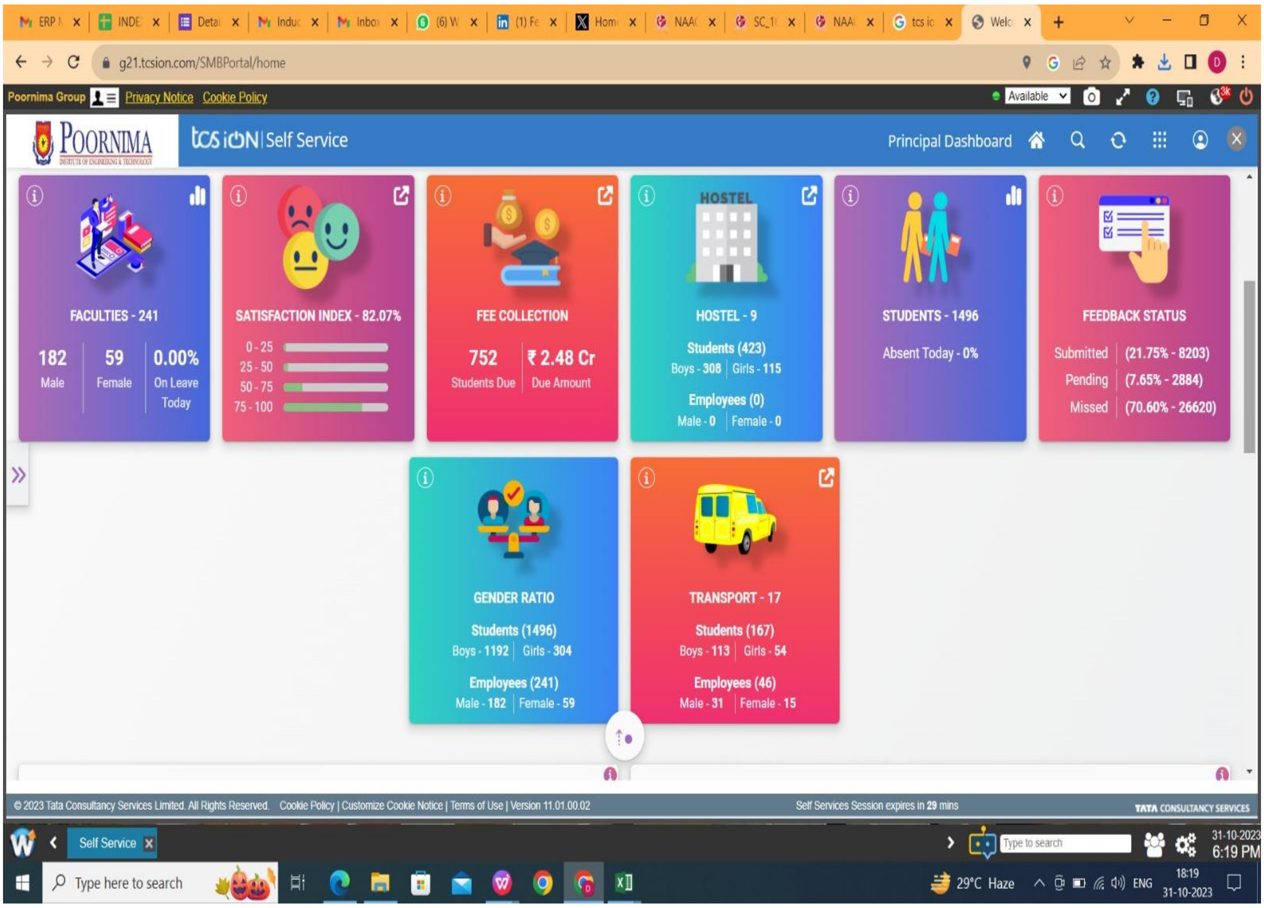
- Enhance Operational Efficiency: By optimizing administrative and academic procedures, manual tasks can be minimized and precision can be enhanced.
- Strengthen Decision-Making Processes: Providing timely data and analytics can assist in making well-informed decisions at all levels of the organization.
- Foster Transparency: It is essential to ensure transparency in college operations, financial practices, and academic documentation in order to maintain trust and accountability.
- Enhance Resource Allocation: By facilitating better management of resources, such as human, financial, and infrastructural resources, the institution can maximize their utilization.
- Align with Strategic Goals: To promote growth and progress, it is important to align the functionalities of the ERP system with the college's long-term objectives.

### Security Measures:

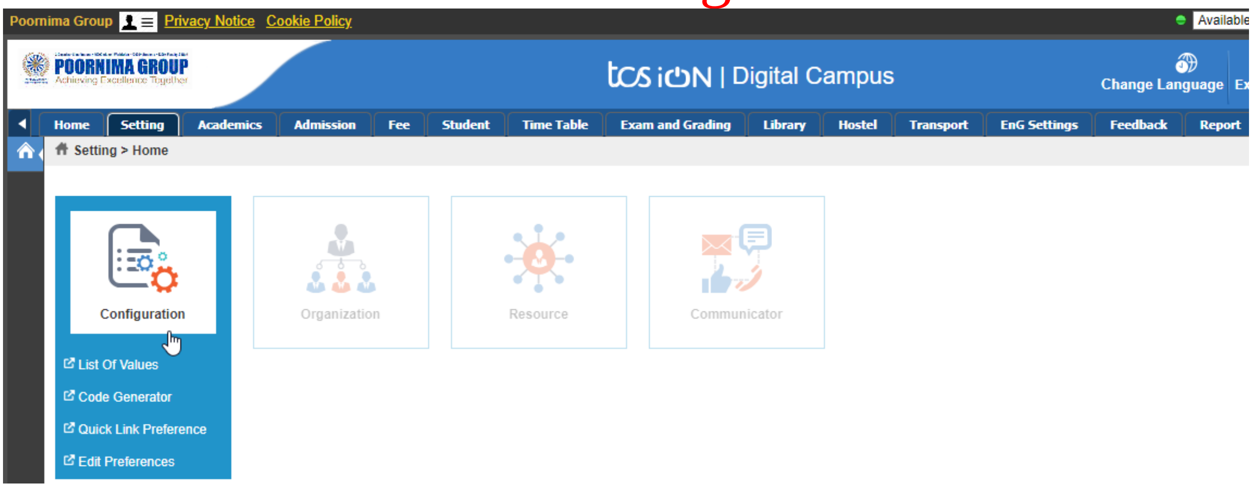
- Data Security: Utilization of cutting-edge security measures to safeguard sensitive data from unauthorized access and cyber risks.
- Access Management: Enforcing stringent access regulations to guarantee that users can solely access relevant information based on their designated roles.
- Data Encryption: Securing data transmissions through encryption to prevent interception and manipulation.

# Digital Campus

The TCS-iON Digital Campus Solution comprises a suite of offerings, which are distinct yet cohesive, catering to seasonal academic events and mapped to specific departments of an institution. It facilitates the entire student lifecycle management from enquiry to alumni and provides the option to select specific offerings to meet your current requirement.

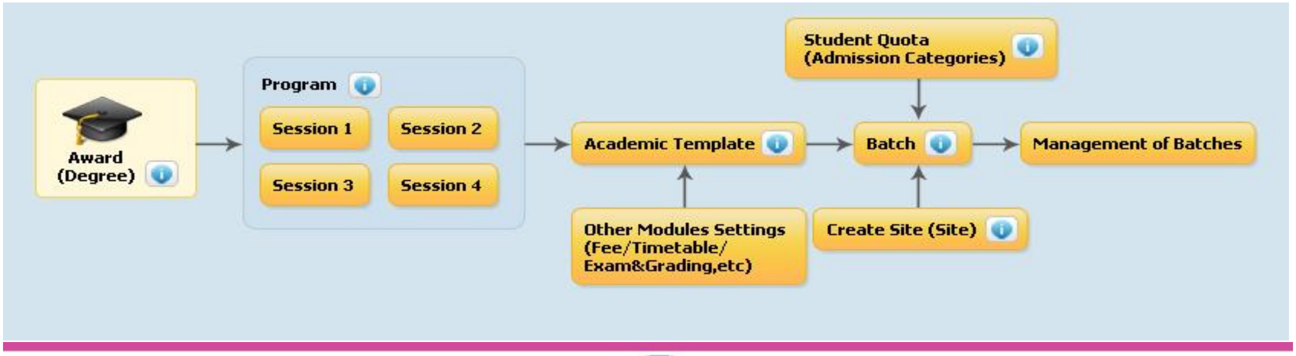


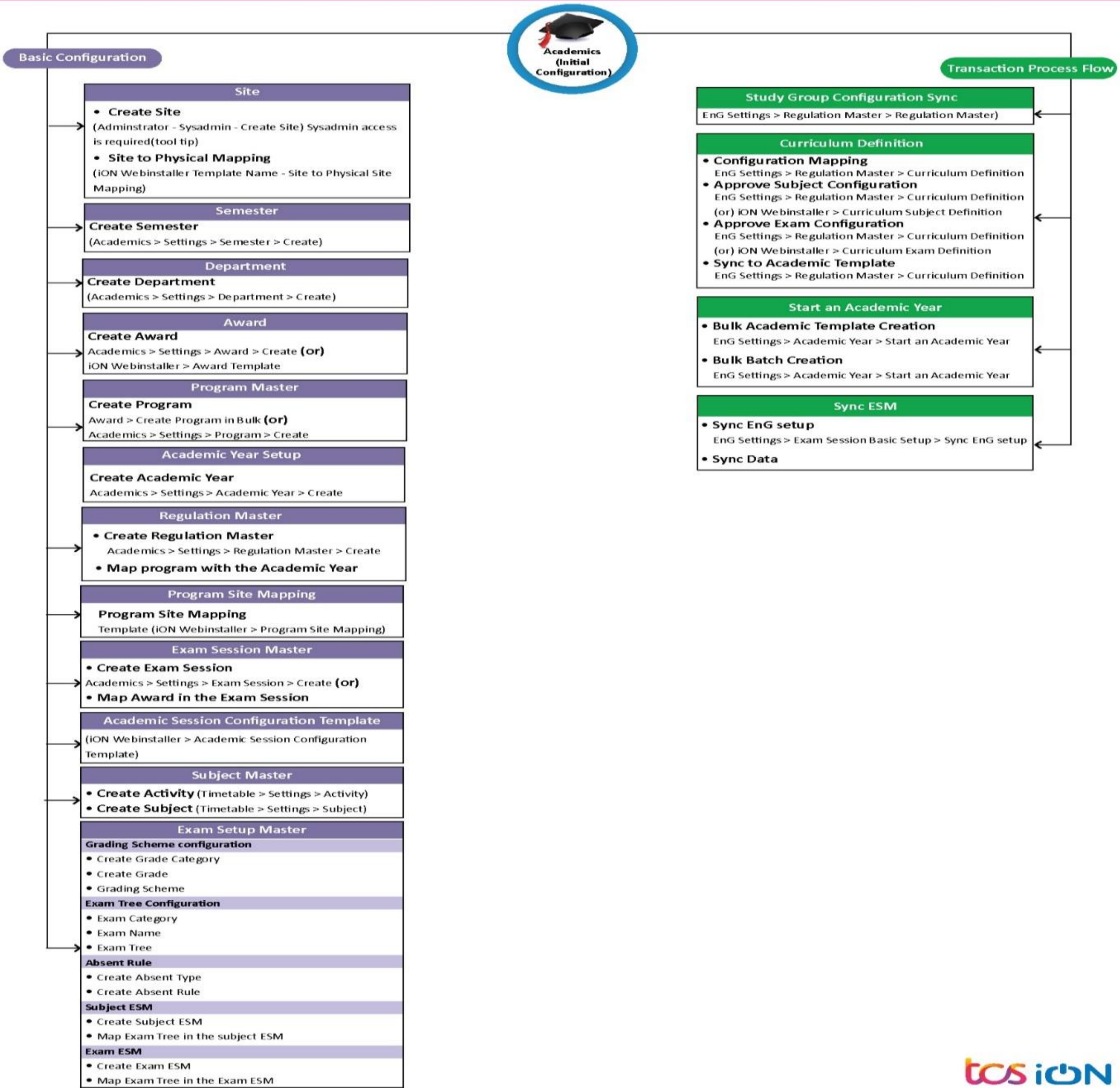

# Settings




# Academics

# Academics Process Flow




# Admission

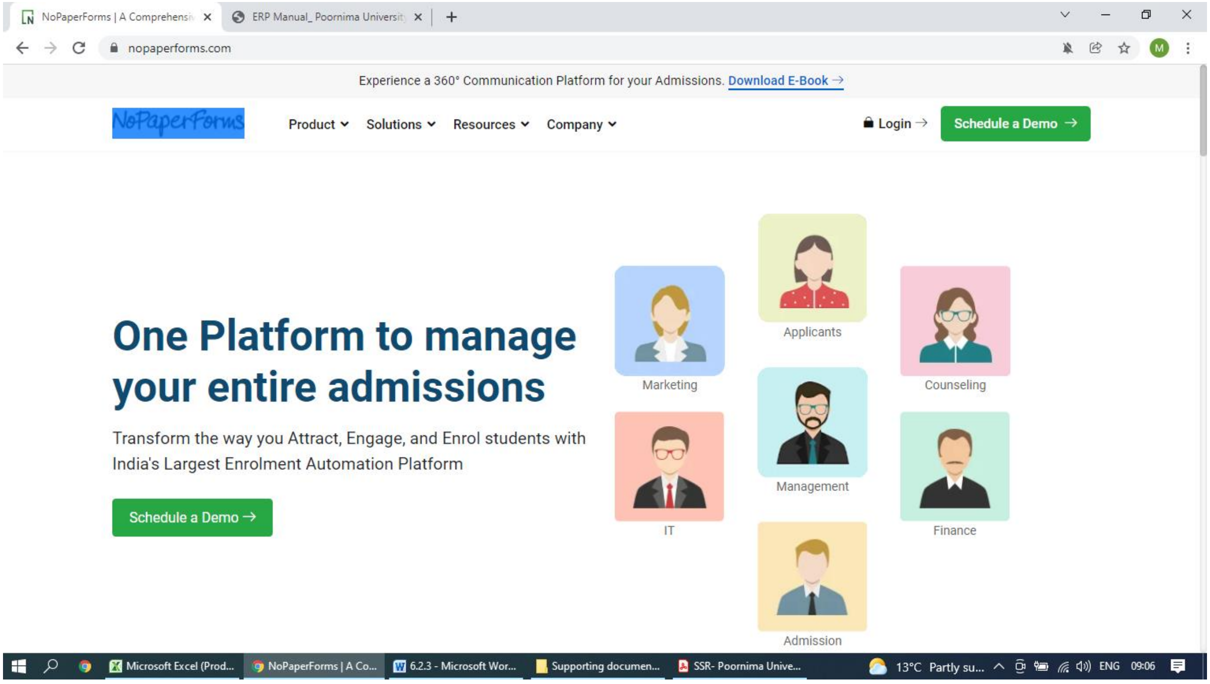
PIET has its Automated Admission Management System using Web based software namely No Paper Forms (NPF) to manage the complete admission procedures of departments of the Institute. This paper-pen process has been not only time consuming but also inefficient and it's difficult to maintain the paperwork and the records. Through this software we are trying to overcome the problem of maintaining paper based records and focusing on the digital library. In addition to record based technology, we would be sending pushing notifications given by the institutes and the very same portal would be again used to notify the students and even the parents about the announcements digitally.

Ensuring to resolve all the above points use of web tool which is implemented using web-services that would connect with the database established on a remote server has been utilized for the purpose of smooth handling and transparency in all departments of admission process Every student gets a Registration ID (a Unique UID) that last for the student, till he is part of the system. All information pertaining to all the leads, admitted students, record maintenance, quality & diversity analysis and alerts for pending documents/processes. The screenshots for the administration system are given below.

**Student Admission and Support:**

- Admission held through Govt. portal (REAP), as institute affiliated to Rajasthan Technical University, Kota
- Student Admission detail is carried out through the Students Module of ERP (TCS iON).
- The college website act as a mirror of the college information. Admission and online transaction interfaces are provided on website. College is having a full time web developer and team members.
- Alumni portal is provided on website for the information of pass out students

**Login Page of Administrator**




In Admissions module, user can register students and display their records. It consists of 3 important modules like:

Student Registration

- User can register students based on their branch, batch and section.
- Student can opt for hostel from the same registration page.
- This is one page registration for reducing the complexity. After this registration for more details user can go to edit option for the registered students.

Import Student:

- User can register 'n' number of students in one-shot by uploading the student registration template.
- For uploading the student registration template first user needs to download the "File Template" based on students branch and batch.

Student/Parent Records:

- User can view/edit/deactivate students.
- Active list contains active list of students which are currently studying.
- User can deactivate students from active students list by clicking on delete button.
- Inactive list of students contains deactivated students from active list.
- Once student is deactivated his/her login-id will be deactivated and he/she will never able to login unless it is reactivated again.
- If any student is deactivated automatically that individual parent get deactivated.

This sub-module consists more sub-modules :

a) Active List – Contains list of all currently active students. Consists of 2 more sub-modules:

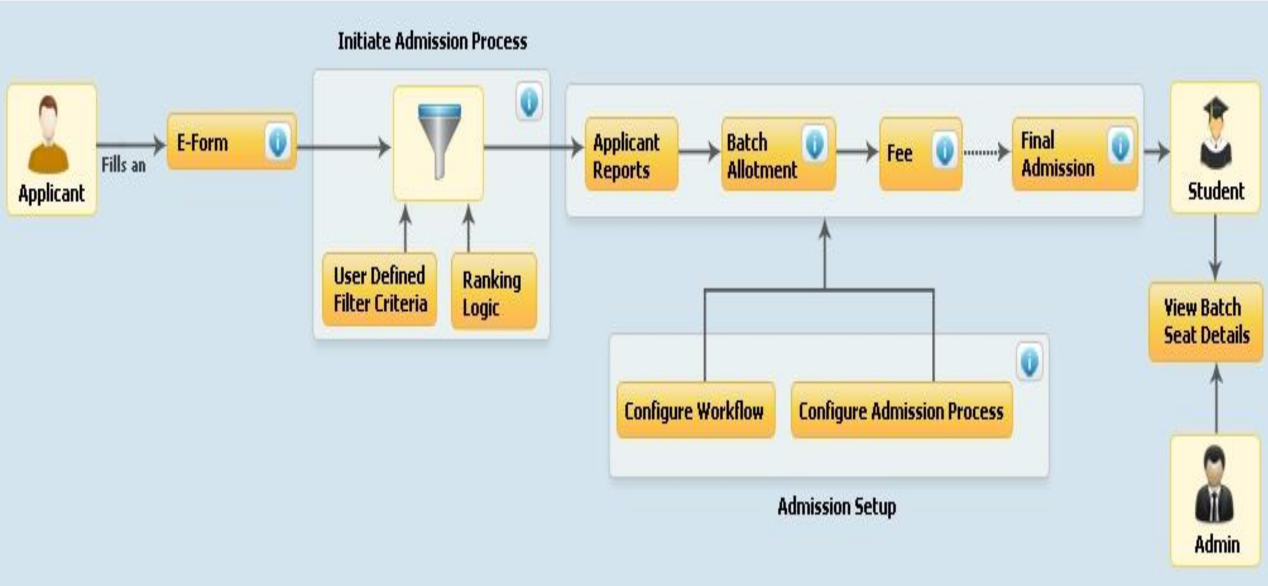
  - Students - To view, edit, disable and also can generate transfer certificate for students.
  - Parents - To view parents active list.

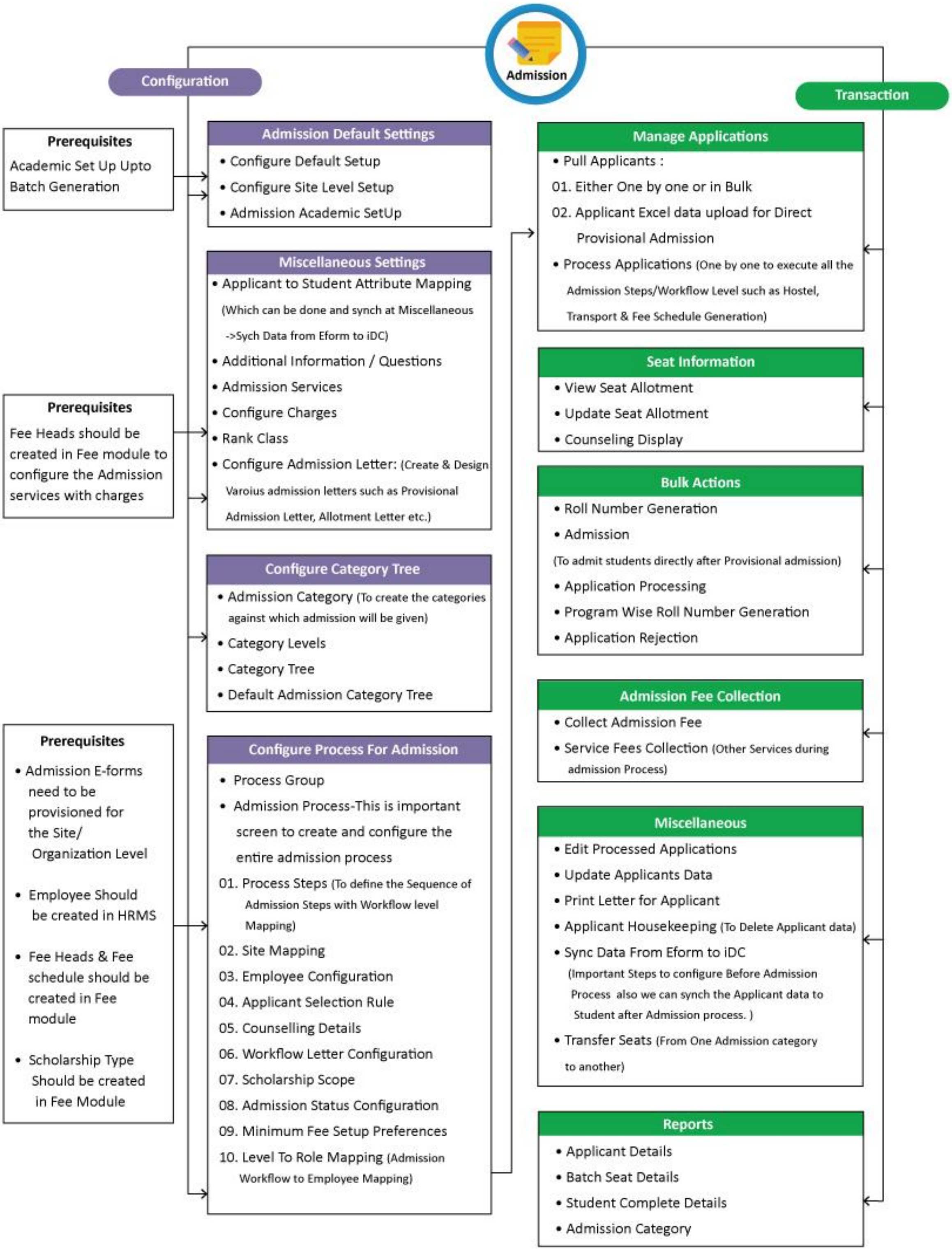
(b) Inactive List – Contains list of all currently inactive students. Inactive students list are shown in Readmission, Transfer, Debarred, Discontinued. Consists of 2 more sub-modules:

  - Students - To view students inactive list.
  - Parents - To view parents inactive list.

(c) First Graduates – Contains list of first graduate student from student's family
Program Details:
User can Create and view all program details and seat availability for various courses.

# Admission Process Flow





Admission
Configuration
Transaction
Prerequisites
Academic Set Up Upto Batch Generation
Admission Default Settings
• Configure Default Setup
• Configure Site Level Setup
• Admission Academic SetUp
Miscellaneous Settings
• Applicant to Student Attribute Mapping (Which can be done and synch at Miscellaneous ->Sych Data from Eform to iDC)
• Additional Information / Questions
• Admission Services
• Configure Charges
• Rank Class
• Configure Admission Letter: (Create & Design Varoius admission letters such as Provisional Admission Letter, Allotment Letter etc.)
Prerequisites
Fee Heads should be created in Fee module to configure the Admission services with charges
Configure Category Tree
• Admission Category (To create the categories against which admission will be given)
• Category Levels
• Category Tree
• Default Admission Category Tree
Prerequisites
• Admission E-forms need to be provisioned for the Site/ Organization Level
• Employee Should be created in HRMS
• Fee Heads & Fee schedule should be created in Fee module
• Scholarship Type Should be created in Fee Module
Configure Process For Admission
• Process Group
• Admission Process-This is important screen to create and configure the entire admission process
01. Process Steps (To define the Sequence of Admission Steps with Workflow level Mapping)
02. Site Mapping
03. Employee Configuration
04. Applicant Selection Rule
05. Counselling Details
06. Workflow Letter Configuration
07. Scholarship Scope
08. Admission Status Configuration
09. Minimum Fee Setup Preferences
10. Level To Role Mapping (Admission Workflow to Employee Mapping)
Manage Applications
• Pull Applicants :
01. Either One by one or in Bulk
02. Applicant Excel data upload for Direct Provisional Admission
• Process Applications (One by one to execute all the Admission Steps/Workflow Level such as Hostel, Transport & Fee Schedule Generation)
Seat Information
• View Seat Allotment
• Update Seat Allotment
• Counseling Display
Bulk Actions
• Roll Number Generation
• Admission
(To admit students directly after Provisional admission)
• Application Processing
• Program Wise Roll Number Generation
• Application Rejection
Admission Fee Collection
• Collect Admission Fee
• Service Fees Collection (Other Services during admission Process)
Miscellaneous
• Edit Processed Applications
• Update Applicants Data
• Print Letter for Applicant
• Applicant Housekeeping (To Delete Applicant data)
• Sync Data From Eform to iDC
(Important Steps to configure Before Admission Process also we can synch the Applicant data to Student after Admission process. )
• Transfer Seats (From One Admission category to another)
Reports
• Applicant Details
• Batch Seat Details
• Student Complete Details
• Admission Category

# FEE

# Overview

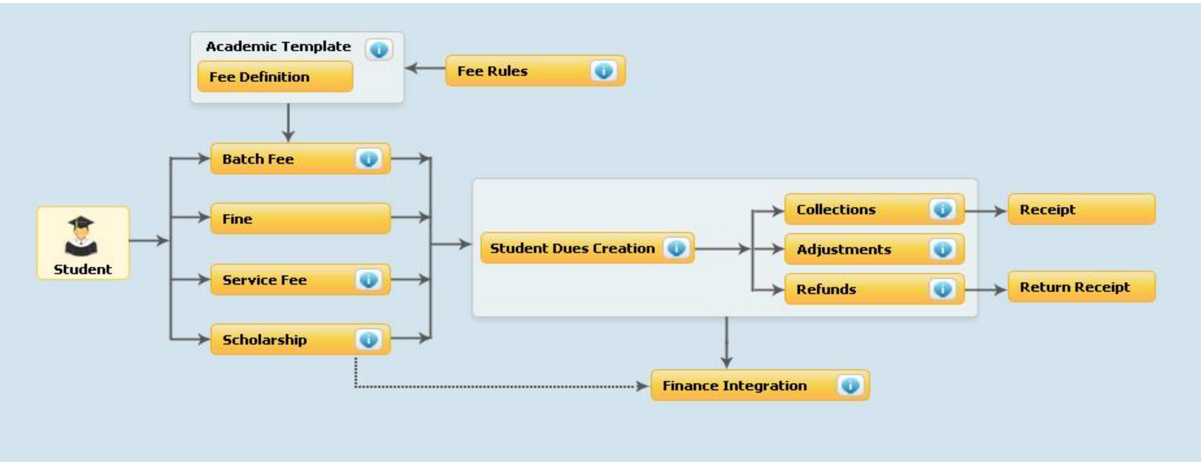
**Fee** module is an essential component of the system. It enables definition of various fees, fee heads, and a structure/program around the process of notification and collection of fees for an educational institution. Admin user can also map the Cost Center and apply GST configurations in Digital Campus.

The complete process comprises of a fee structure that includes identification of a fee group, a set of fee heads against which collections/payments are effected, a set of rules that set the conditions and schedule for payment, and also addresses exemptions. Fee module has an integration with core F&A system—where the organization's master list of accounts are defined along with the mapping of the heads to respective bank accounts.

Fee module has an absolute relevance on Admission, Student details, Payments and Dues, Time Table, and Exam & Grading modules.

It also has relevance to Library, Hostel, and Transportation modules where such services are relevant and payments included as part of fee.

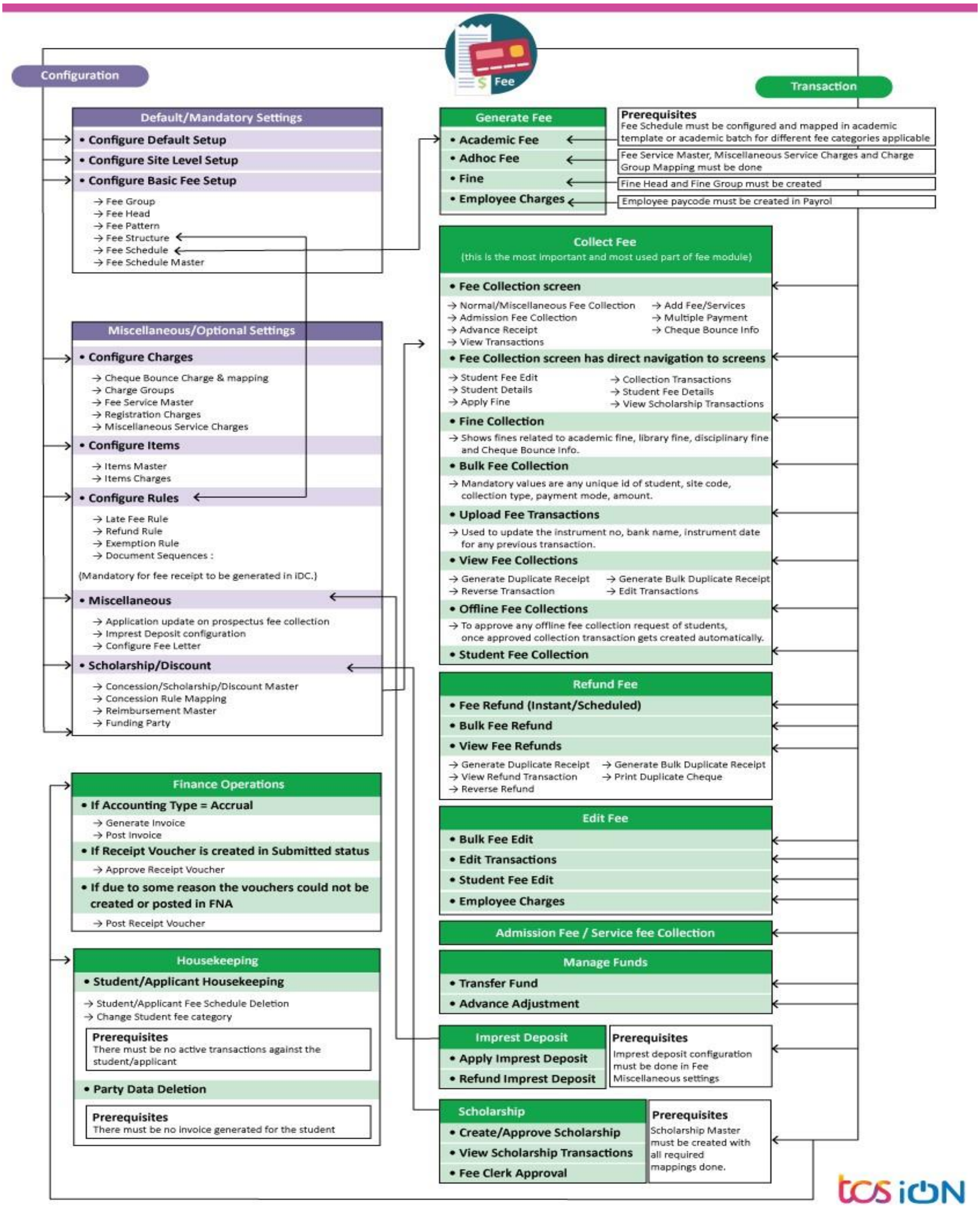
## Fee Process Flow





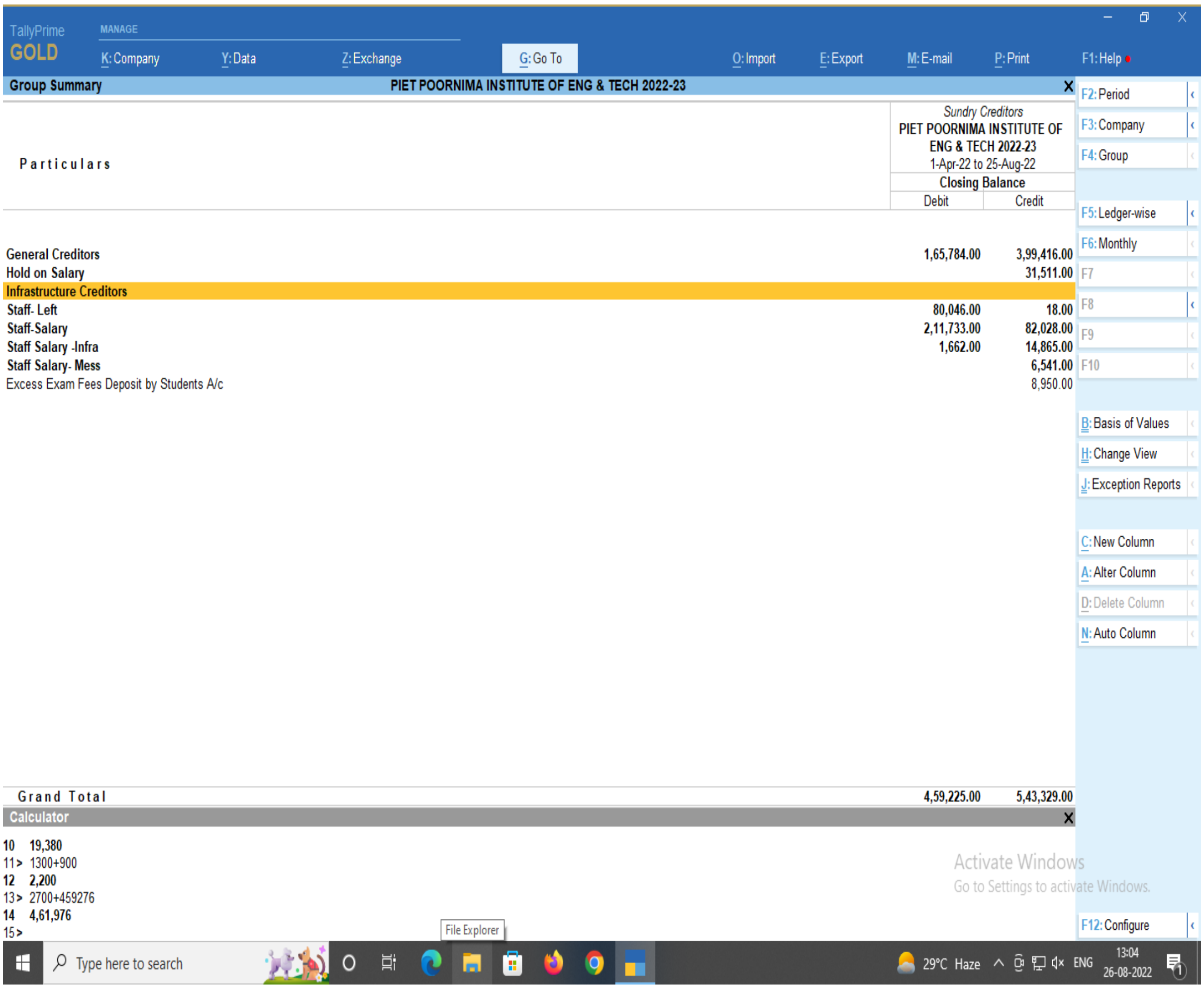
# Flowchart

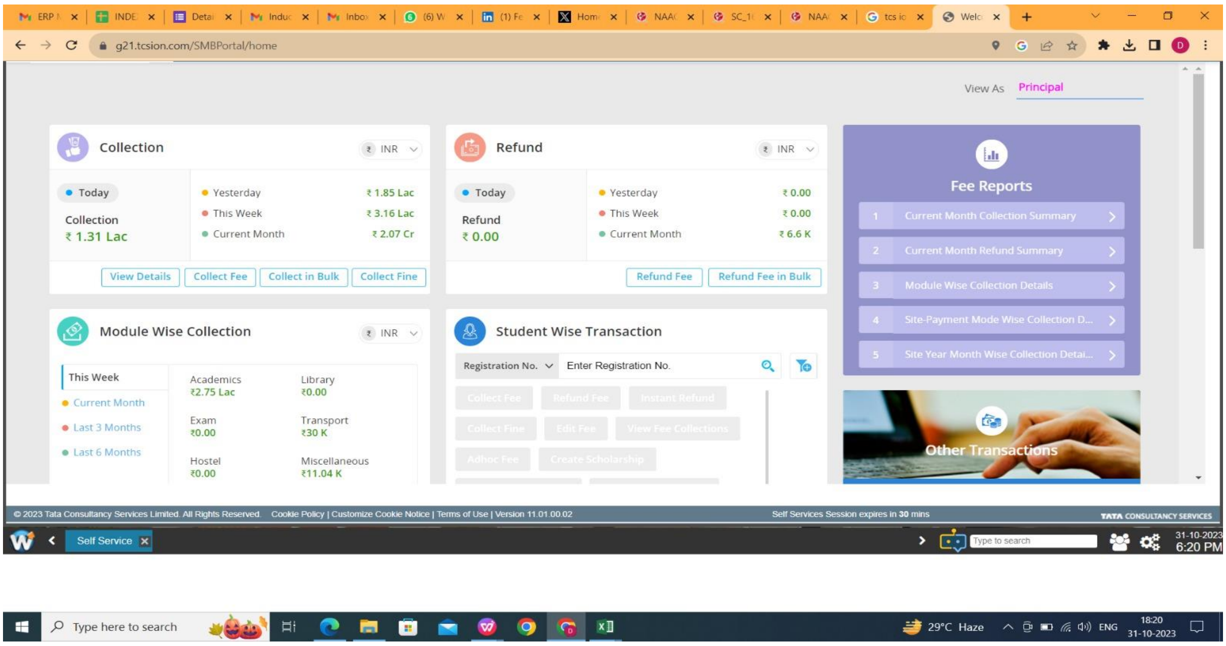
The following diagram depicts the process flows diagram for the Fee module:



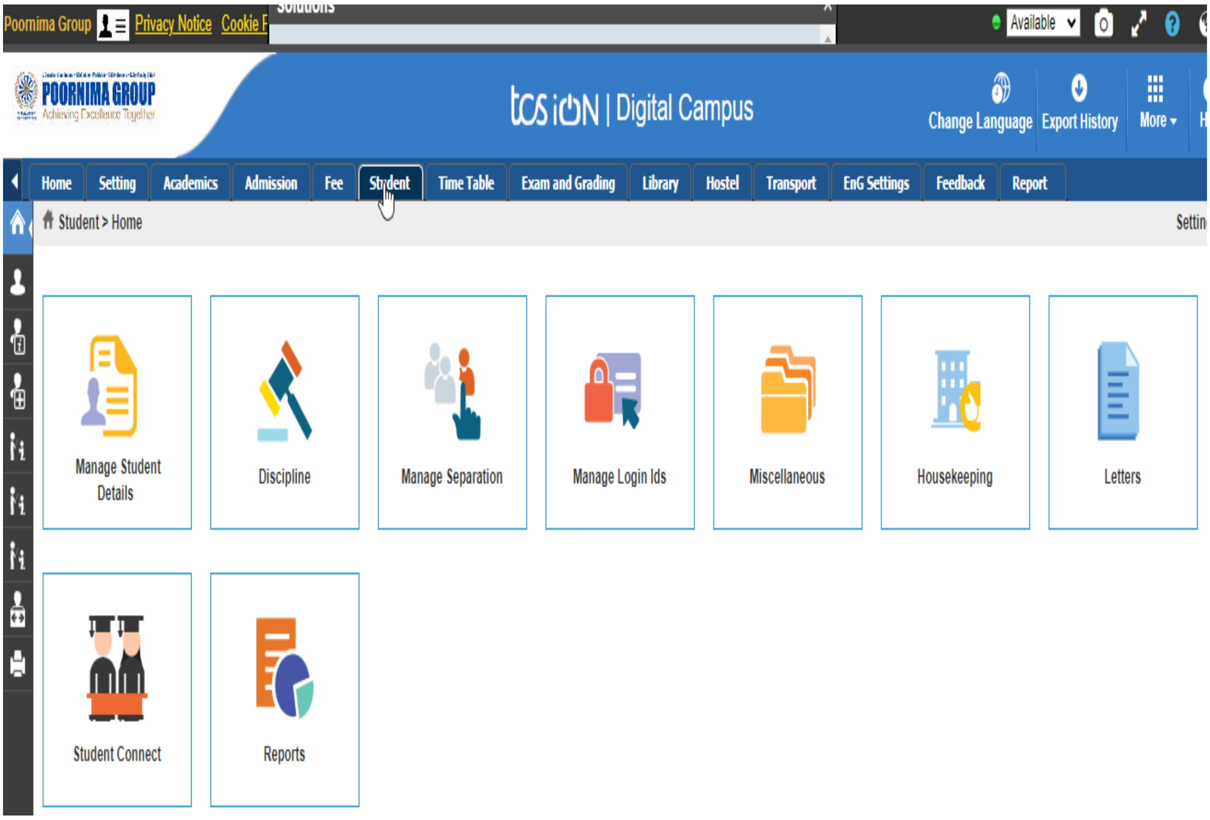

## Tally

It is a computerized system for accounts. It is used to record financial activities of the institutions. It is a multipurpose software including inventory management and accounting. The office continues to maintain its account on Tally. Latest versions of the software to be purchased and used by the Institute. Advanced features help the staff to maintain financial records effectively and efficiently. Profit and loss, Balance Sheet are generated through this software only. All the analysis reports are also generated through Tally. Appropriate security measures should be taken for maintaining confidentiality of the transactions. Training to the existing staff and updation of the existing software must be done regularly. The College also uses multiple software like Public Financial Management System (PFMS) which is used to manage the funds received from the Government, Payroll Management System which helps to automatically calculate the salary, generate salary slips, and disperse the salary to the bank accounts. TDS, Provident Fund, Allowances, etc. all are managed by this system. Reports can be generated for all Staff members. Payments are generally made and received through online mode such as NEFT, RTGS, Bank Transfers, etc.





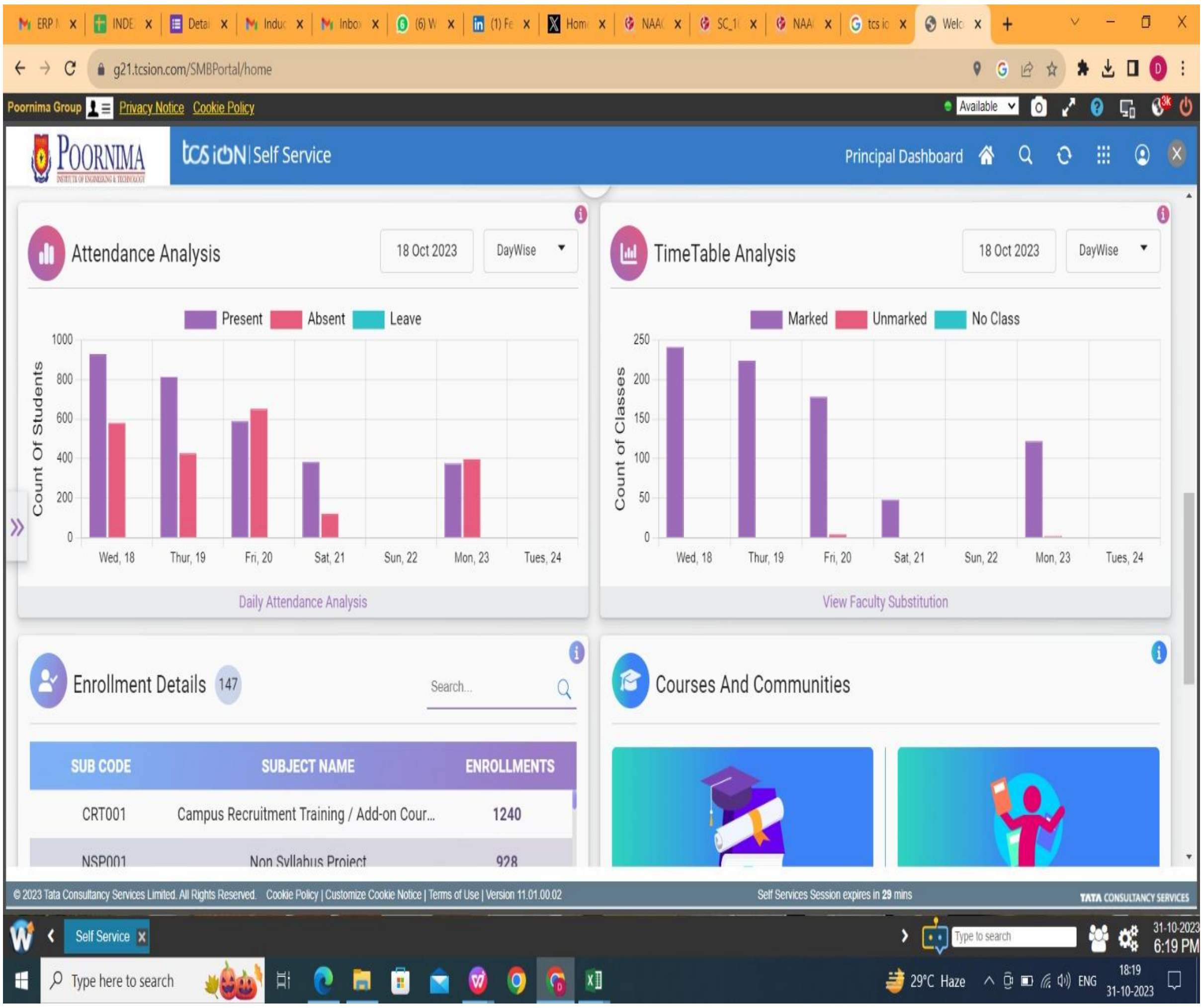

# Student



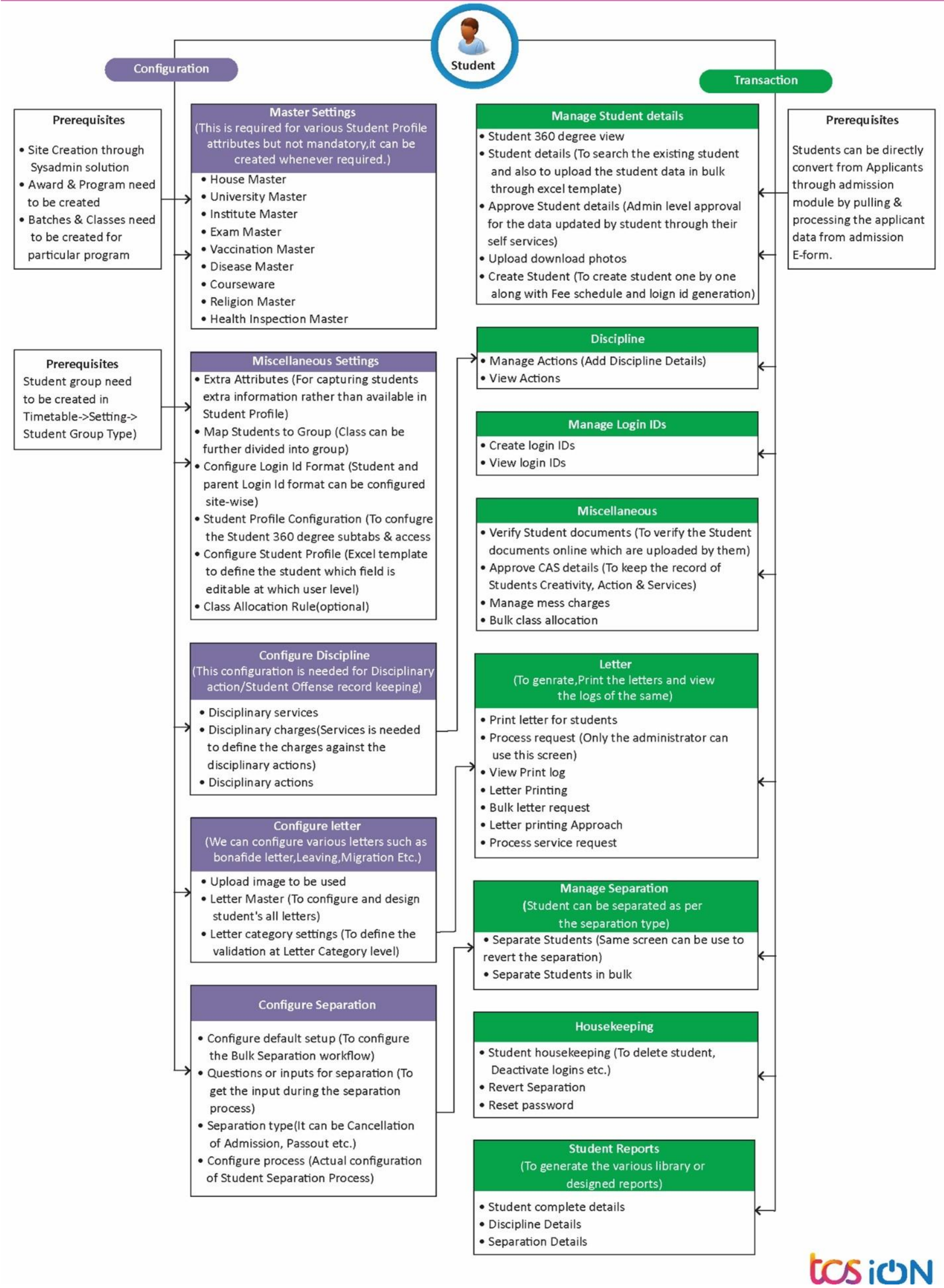

The **Student** module requires minimal configuration per se from an activation perspective. The interface is used for creating login IDs for the student and parent; configuring student profiles, and student attributes as a major requirement. The other configuration aspects are academic in nature and would be used mostly in the schools (K12) micro-vertical.

The Student module is used to create a house master, university master, institute master, examination master, and disease master. Along with this, it is used to configure student profile access, and map students to a group. The most important feature of this module is that it allows you to maintain a database of all the students belonging to the institute, thereby giving you a 360-degree view of the student.

- **Student -Settings**
- **Student Details**
- **Student 360 Degree View**
- **Approve CAS details**
- **Create Login IDs in Bulk**
- **Verify Student Documents**
- **View Student Login IDs**
- **Student HouseKeeping**
- **Student Details Approval**
- **Bulk Photo Signature Upload**

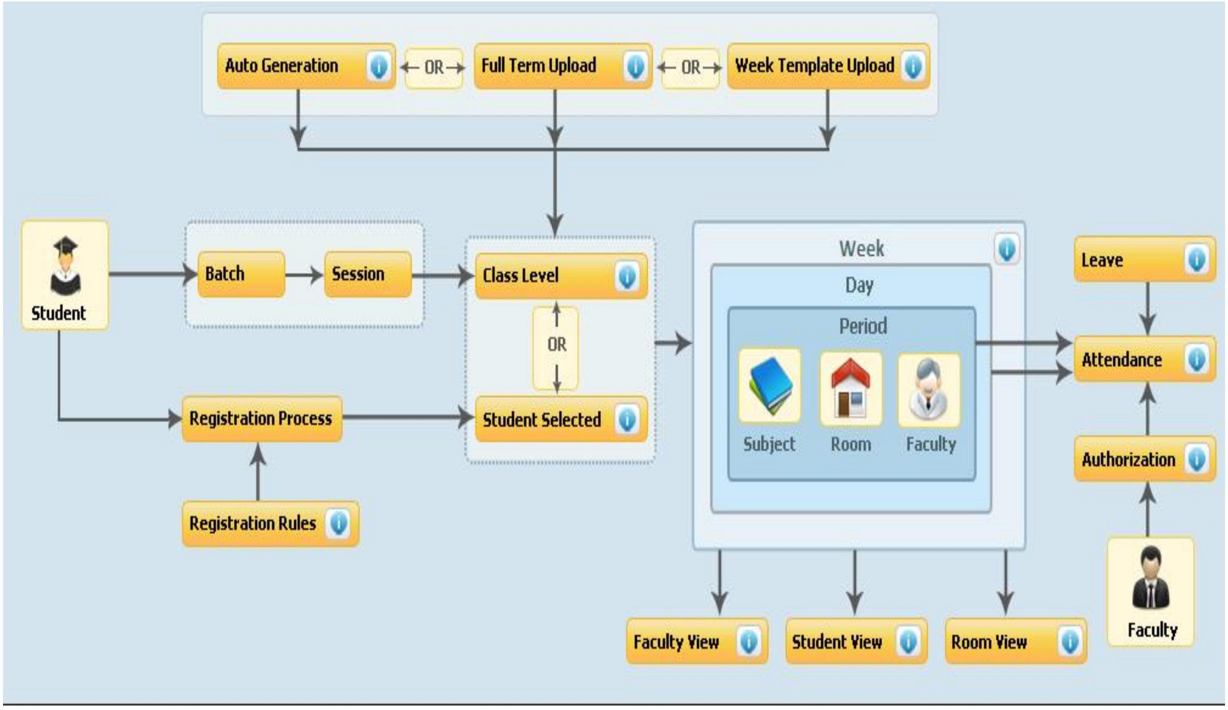


# Process Flow




# Time Table

# Time Table Process Flow





## Overview

The Time Table module, which is also known as the class schedule, provides an overview of the activities planned for a class on a daily basis for the duration of the academic year/session. The Time Table module needs and is also responsible for the synchronization of the following resources or elements:

- Students
- Teachers/Faculty
- Rooms
- Subject
- Time slots or Periods

The prerequisites or essential inputs to prepare a time table are:

- List of subjects offered for the batch/class
- Faculty responsible for conducting classes for each subject
- Lessons planned for each subject
- Activities conducted as part of each subject
- Duration/time slots/period
- Number of periods for a day
- Number of teaching hours or in-session duration for each subject, per day/week/month/session
- Teaching hours preference of the faculty
- Teaching load/number of teaching hours admissible for each faculty or a category of faculty
- Classrooms where the class will be conducted

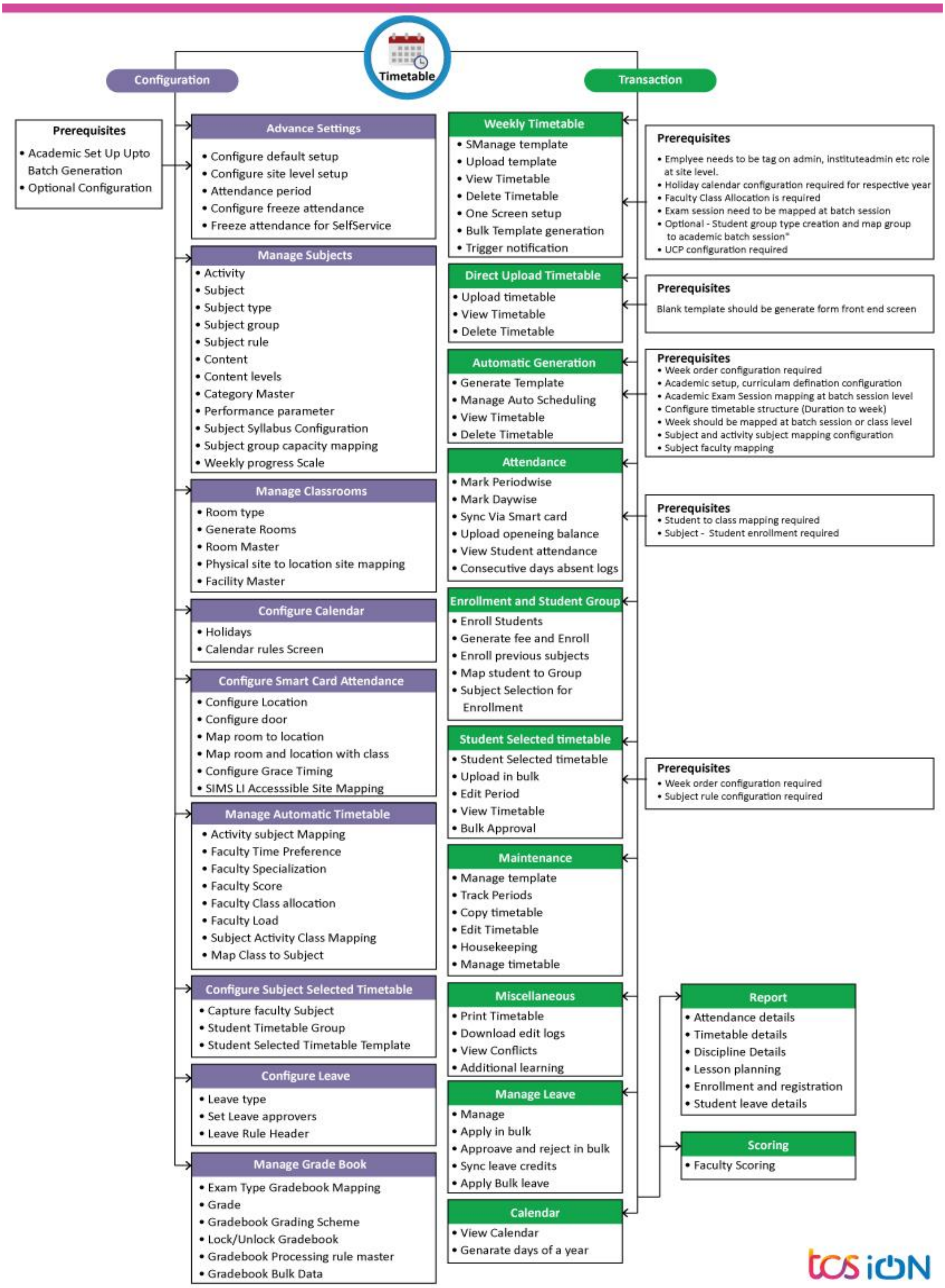
The overall process for time table management is close to the industry-wide process for managing sessions and academics in an educational institution. Further, the Timetable module can be further configured to accommodate certain one-off rules and conditions that a certain academic institution may have.

The approaches followed to generate time table are:

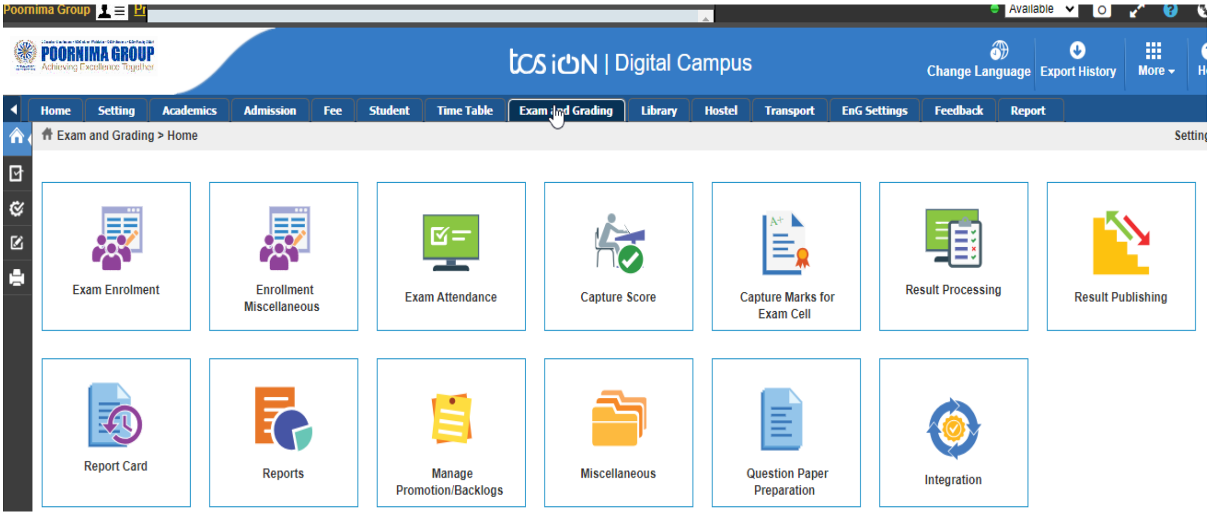
- **Direct Upload Timetable**: Direct upload of timetable helps institutes to set timetable in scenarios where timetable changes frequently and is not same for all weeks.
- **Weekly Timetable**: Timetable is same for all weeks in a semester and is set on semester basis in this approoach.
- **Auto Generate Timetable**: Timetable is system generated in this approach, based on the constraints defined in configuration for auto generation.
- **Student Selected Timetable**: This is beneficial to higher education institutes where student selects subjects and faculty for subject. Timetable is generated on the basis of subjects and faculties selected by students.

# Process Flow

The process flow diagram helps us understand the processes related to the Time Table Management module.




# Exam & Grading




# Overview

Educational institutions use examinations and grading mechanisms to assess the students' knowledge, understanding, and application of the concepts in the various subjects taught as part of the course/ program.

There are different ways of capturing scores and different ways of evaluating a student's performance and these can be classified into two major streams.

- Capturing marks against the student/ work (quantitative approach)
- Capturing grades against them (qualitative approach)

Scores would normally be captured at multiple levels—session or class level, subject level, or specialty group level—that is, cases where only a set of students from the same or different class or even from different batch/session would be taking up a particular subject (for example, language courses ).

The grading patterns vary across institutes, while some assess the students using the conventional marking mode; others use grading systems on the basis of pre-determined ranges of marks.

There are different ways of capturing scores and ways for evaluating the responses.

- Capturing marks against the responses (quantitative approach)
- Capturing grades on the basis of these responses (qualitative approach)

Score can be captured in three levels:

- Session/Class Level
- Subject Level
- Group Level (group of students taking subject together)

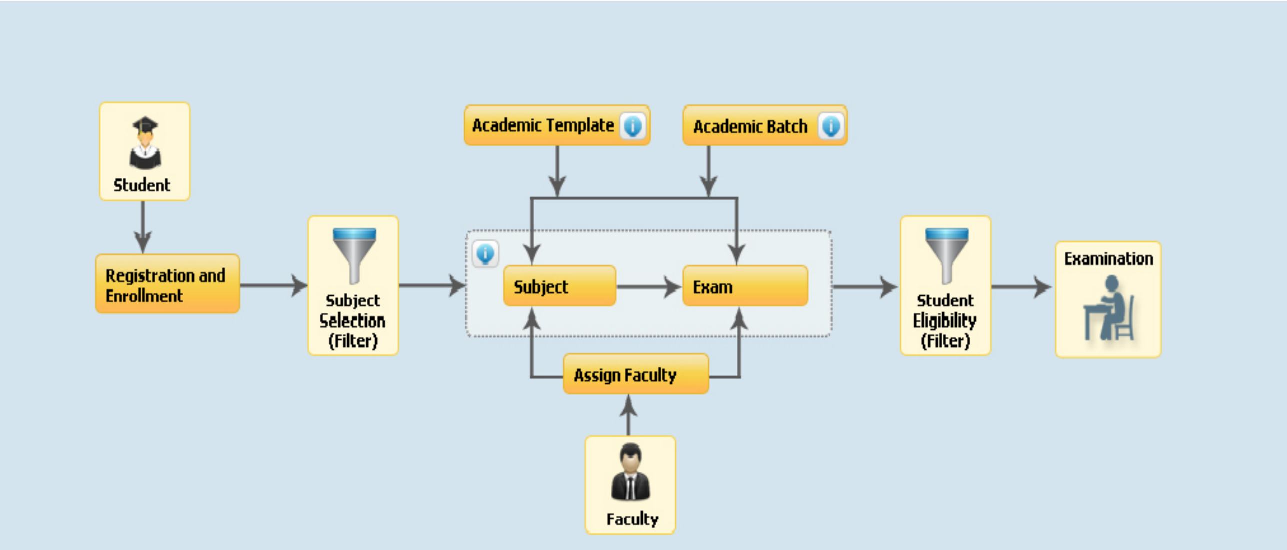
# Process Flow

This section describes two process flows independently:

- Examination Process Flow
- Grading Process Flow

## Examination Process Flow

The examination process can be used to manage both regular and backlog examinations. Subject Selection Rules can be applied at the point of registration/ enrolment to the semester/session, and similarly exam eligibility rules can be applied prior to examinations based on the criteria for the required examination. This also works as a screening mechanism and only students meeting all required criteria, such as attendance, internal marks, assignments, etc. are permitted to appear for the main examination for the level/program.



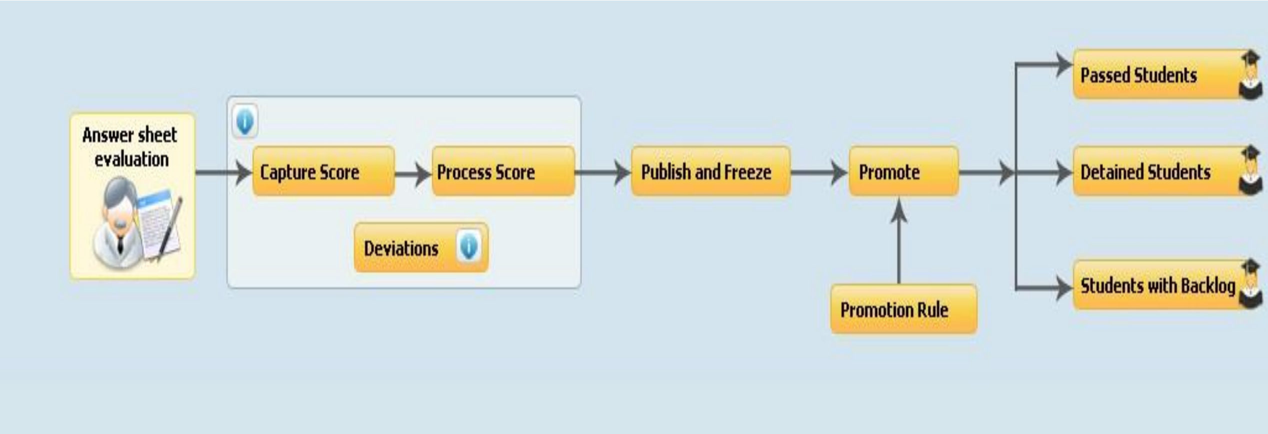

## Grading Process Flow

The answer scripts are evaluated and the scores are captured and finally published and frozen. Rules for grade and promotion criteria are applied and accordingly the student record will be updated.

This module is linked to and gets inputs from the time table module, academic batch, and academic template. The Grading schemes are of two essential types**: Consolidated Grading Scheme and Non-Consolidated Grading Scheme.**

The **Consolidated Grading Scheme** is attached at the exam pattern or exam detail level and would be helpful in calculating the student result at exam level (which will be a consolidation of all the subject marks/grades present under that exam).

The **Non-Consolidated Grading Scheme** is attached at a Subject Level and applies to the Subjects of each examination(s). In the Non-Consolidated scheme, there could be a different grading scheme for each subject that would need to be collated before the final score is frozen and published.




# Library

## Overview

The Library module provides a well-defined and tested workflow for managing the various resources in a library, and maintaining the catalogue of items, processing issues and returns, booking and prioritization, binding, and other vendor interactions and management & collection of late fee and damages from students or faculty.

The Library module is closely integrated with iON Procurement and Inventory solution (P&I) when it comes to acquisition of holding. Acquisition of holding can be done from both—P&I and the Library module. Whenever a holding is created in the Library module, the inventory of item is updated in P&I. When items are received from P&I through a GRN, holdings are created automatically in the Library module.

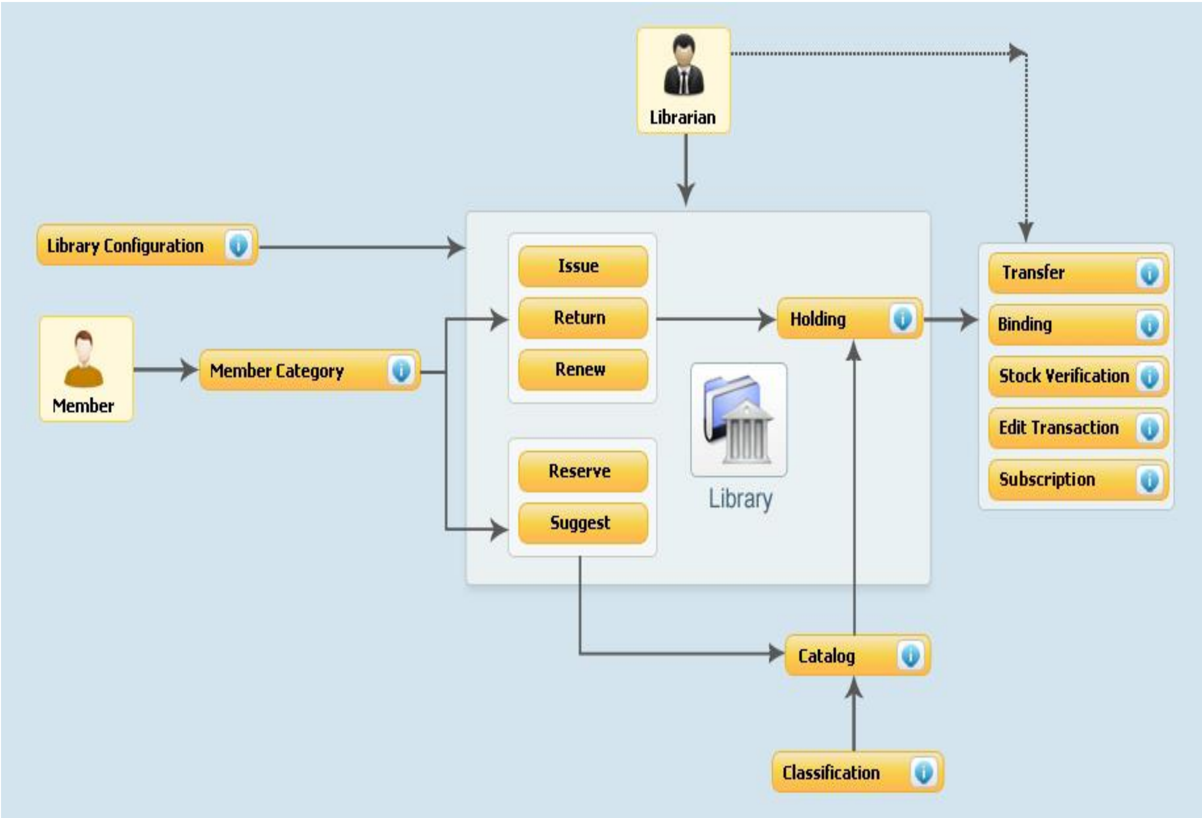
The Library module could be a standalone instance for one site/ unit or across multiple libraries across the organization. Further, in the case of a university/deemed university setting, the various libraries can also be mapped to the central university library with transactions being either open across all the sites or restricted to the site where the student belongs to.

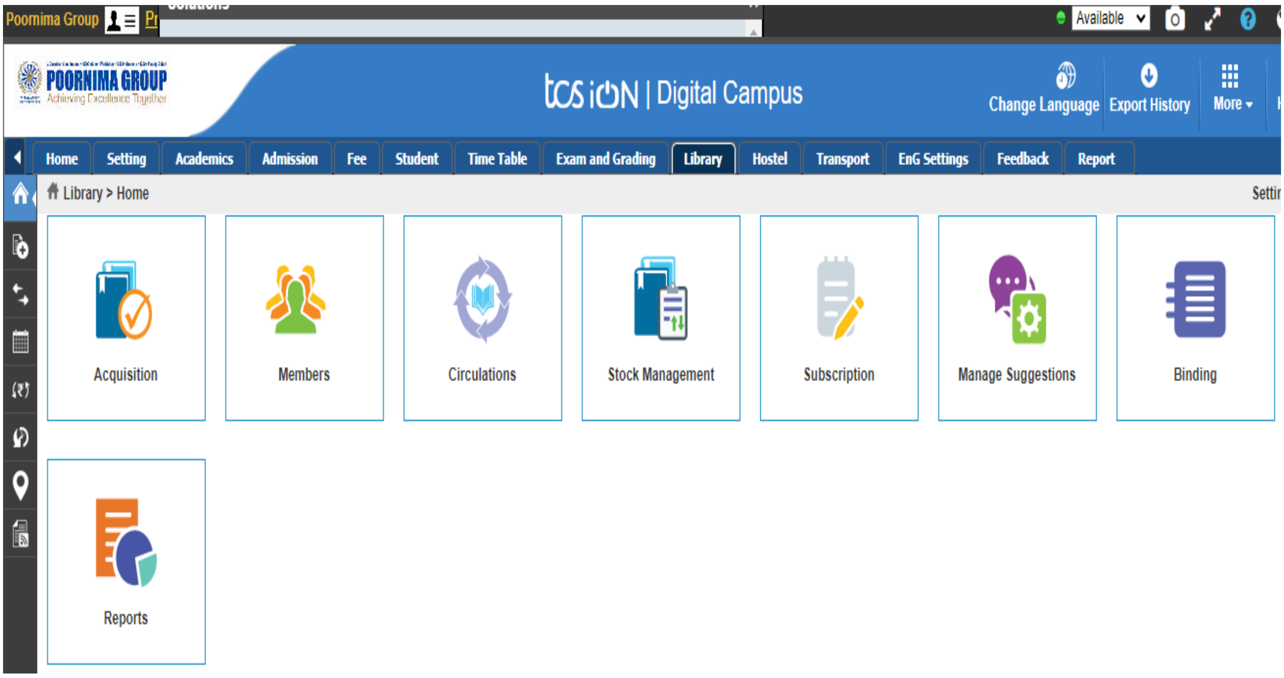
Members of the library are categorized into three types:

- Student
- Employee
- Guest

Business rules for the library would address issue and return policy across the membership categories and between the departmental and site libraries of the unit/organization.

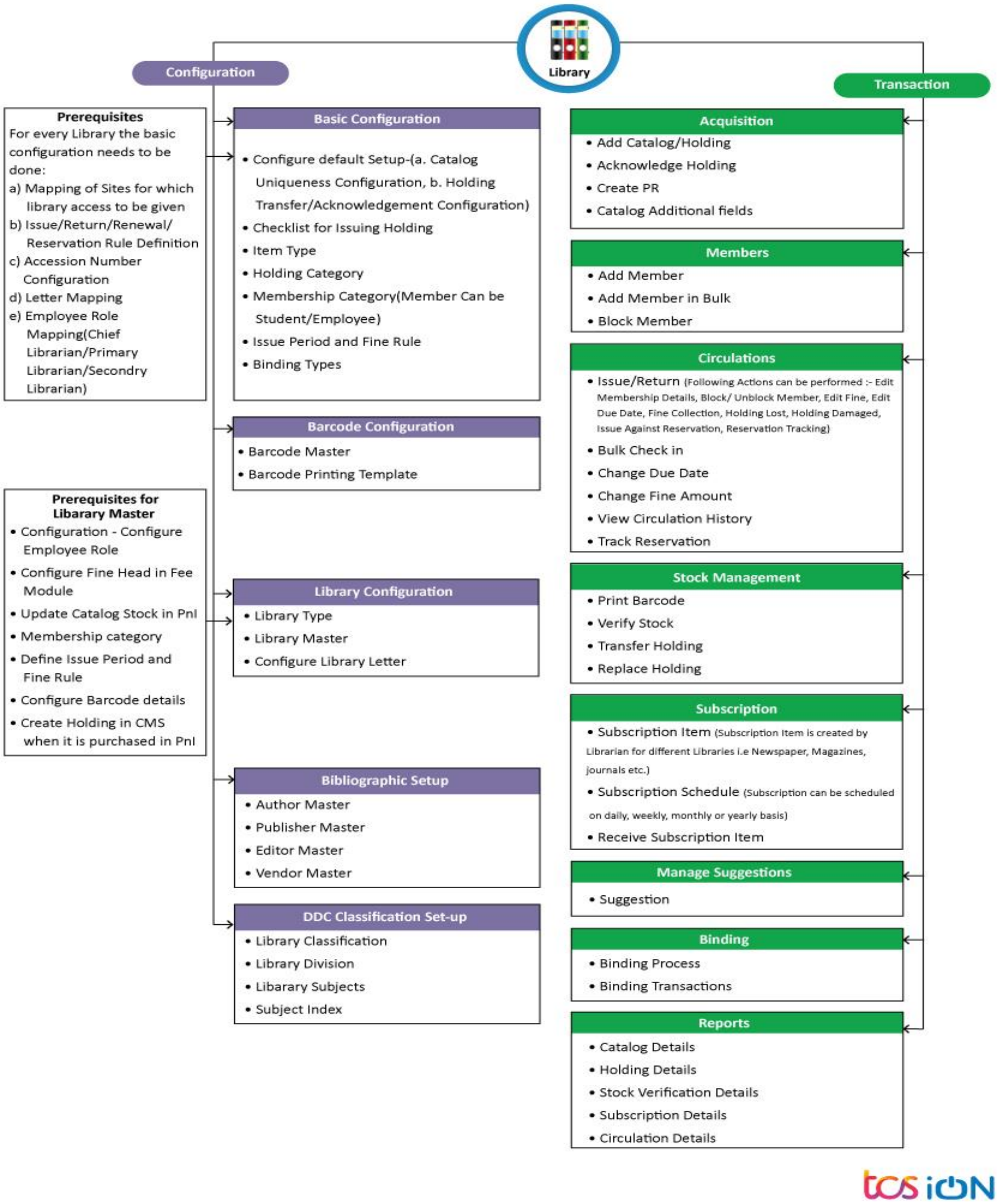
# Library Process Flow



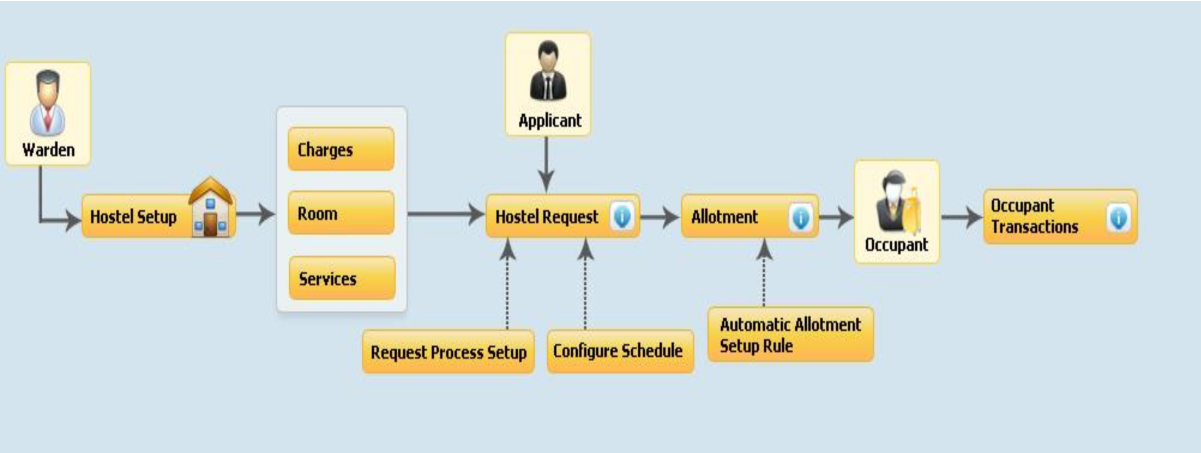

# Process Flow

The following figure depicts the process flow of the Library module:




# Hostel

# Hotel Process Flow





# Overview

The **Hostel** module provides a well-defined workflow for managing hostel resources, processing hostel requests for students and faculties, tracking student activity, managing resources and rooms within the hostel block(s), management of fees, and various charges/fines incurred by students, marking hostel attendance, and maintaining a gate register.

In this document, we shall see how to create a Hostel and how to perform transaction.


# Prerequisites

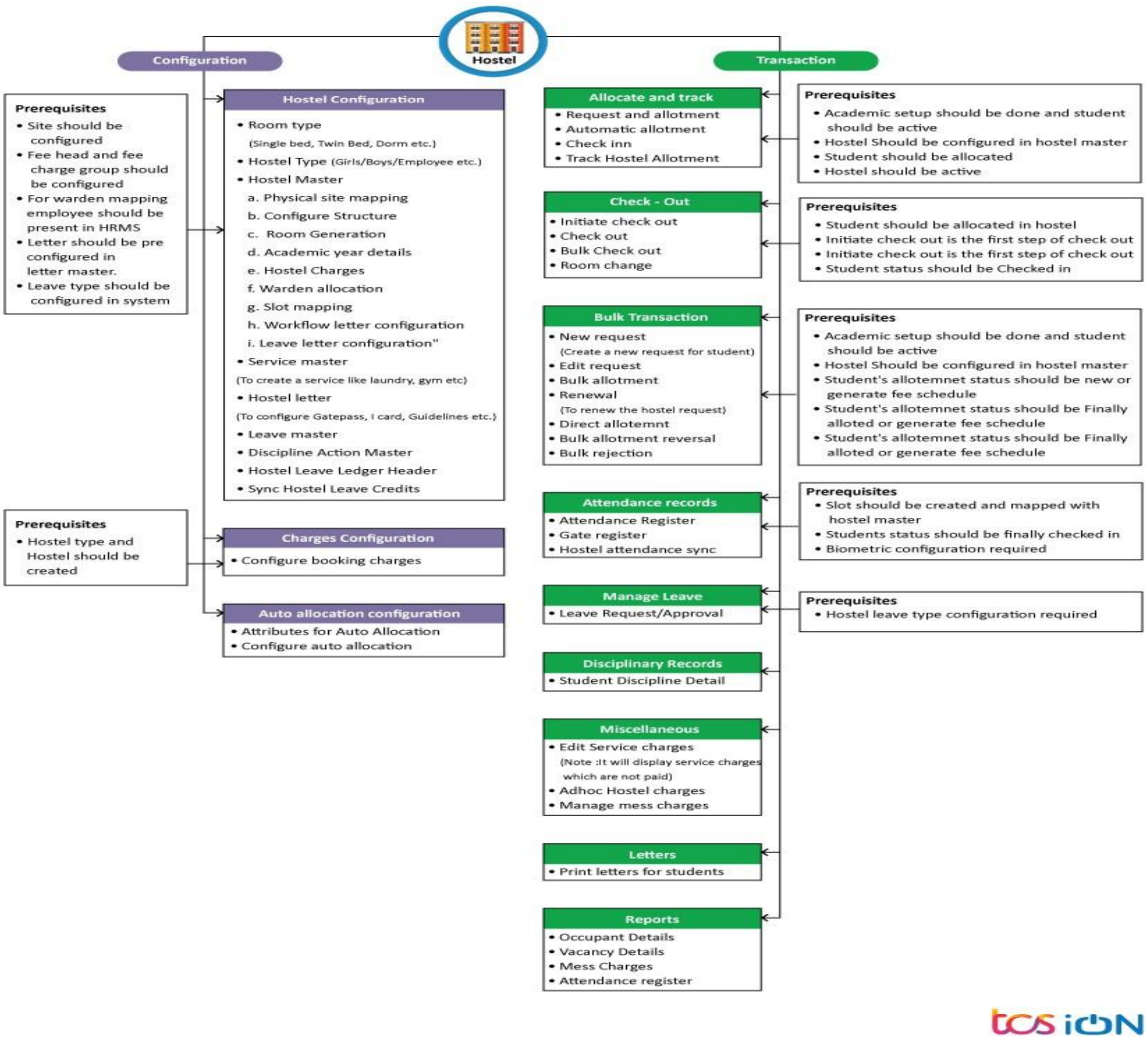
Physical site, employee, students/applicants, room type

# Concept in TCS iON

Hostel is a separate module in ion ERP system it helps to manage room allocation of student end employee of an organisation.

# Process Flow

The hostel structure details are shared by the customer based on which they are created in the system according organization.




# Ways to Achieve

The hostel is created in the system by configuring it from front end.

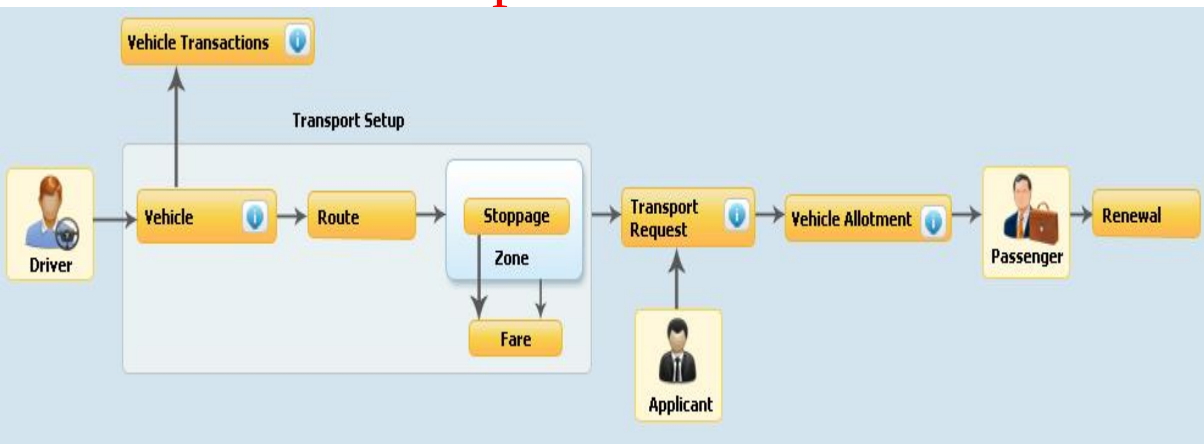
## Steps

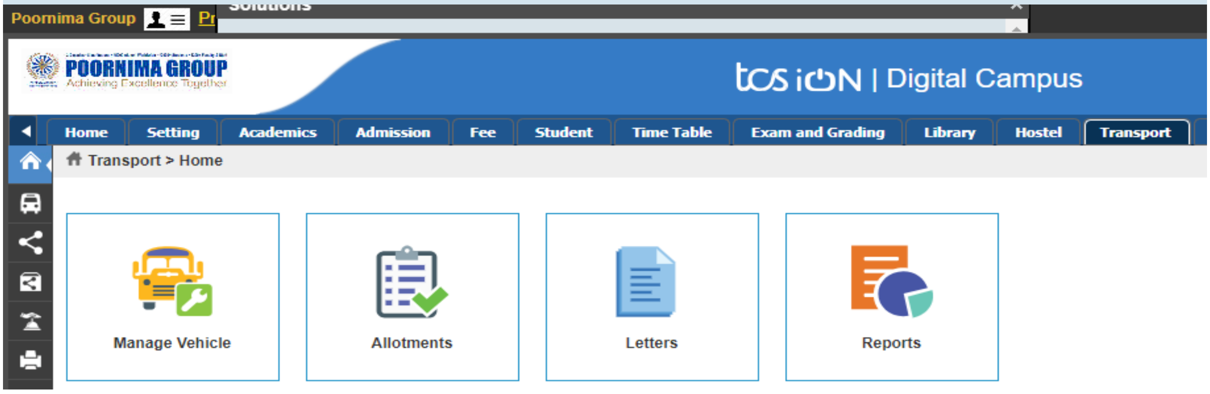
To set up the Hostel module, follow these steps:

1. **Configure the Hostel Setup**: For the basic configurations of the Hostel module, you must create the attributes for auto-allocation, create a room type, hostel type, hostel master, and a service master.
2. **Configure the Different Charges for the Hostel Setup**: To configure the different charges for the Hostel module, set up the booking charges, the hostel charges, the request process, and the auto-allocation.
3. **Other Configurations**: Along with the basic configurations, you must make some other setups for managing the hostel registration, the leave types, and the discipline action master.
4. **Room Allocation**: Once a request is initiated, a hostel room is allotted to the applicants who have requested for a room.
5. **Maintaining Attendance Records**: A gate register and an attendance register are used to maintain attendance records of the different students.
6. **Managing Leaves**: The hostel administrator allows you to manage leaves and disciplinary records.

# Transport

# Transport Process Flow




## Overview

The **Transport** module is used to offer and manage transport facilities for employees and students. The facility can be managed for a site or for the units in the entire organization. The facility allows for managing transportation requirements of the organization for both the scenarios—hired or chartered transportation and own transportation.

The system includes applications for transportation, allocation, vehicle configuration, routes, route-stages, charges, and stage-wise payment from students, payroll interfacing, and deduction from the employees, vehicle management, service history, insurance, driver details, and so on. It also provides a well-defined workflow for managing transportation resources, requests, and tracking of allotments.

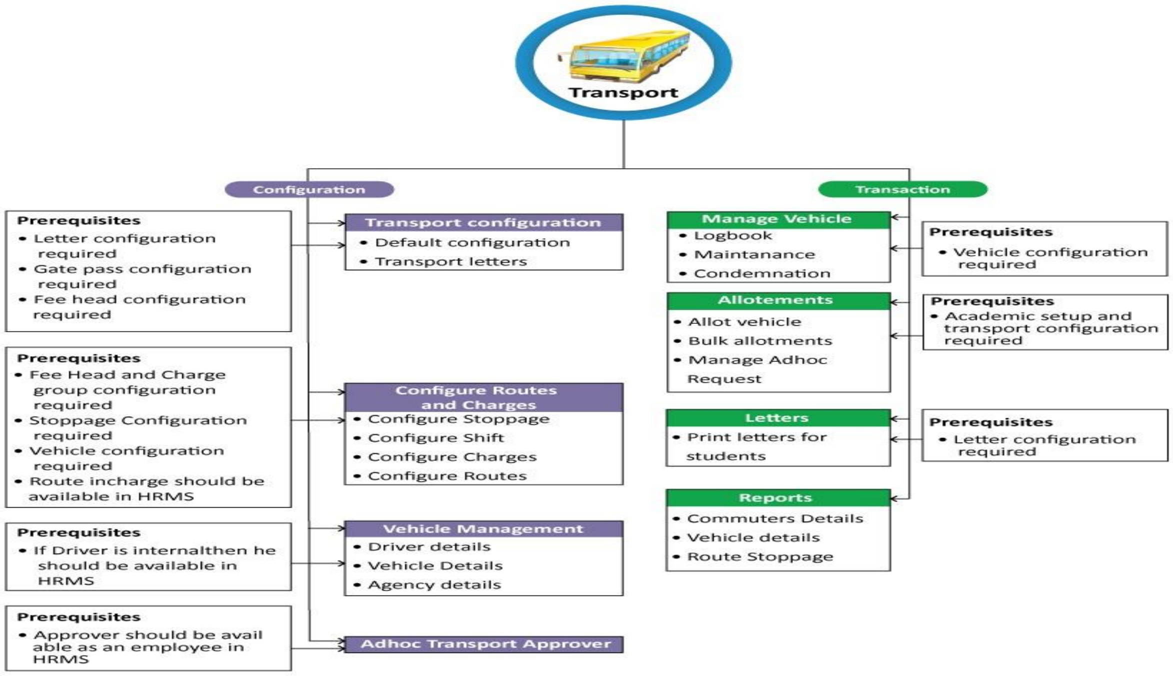
## Concept in TCS iON

Transport is a separate module in ion ERP system it helps to manage transport allocation of student end employee of an organisation.

Click on the following links to learn more about the **Transport** module:

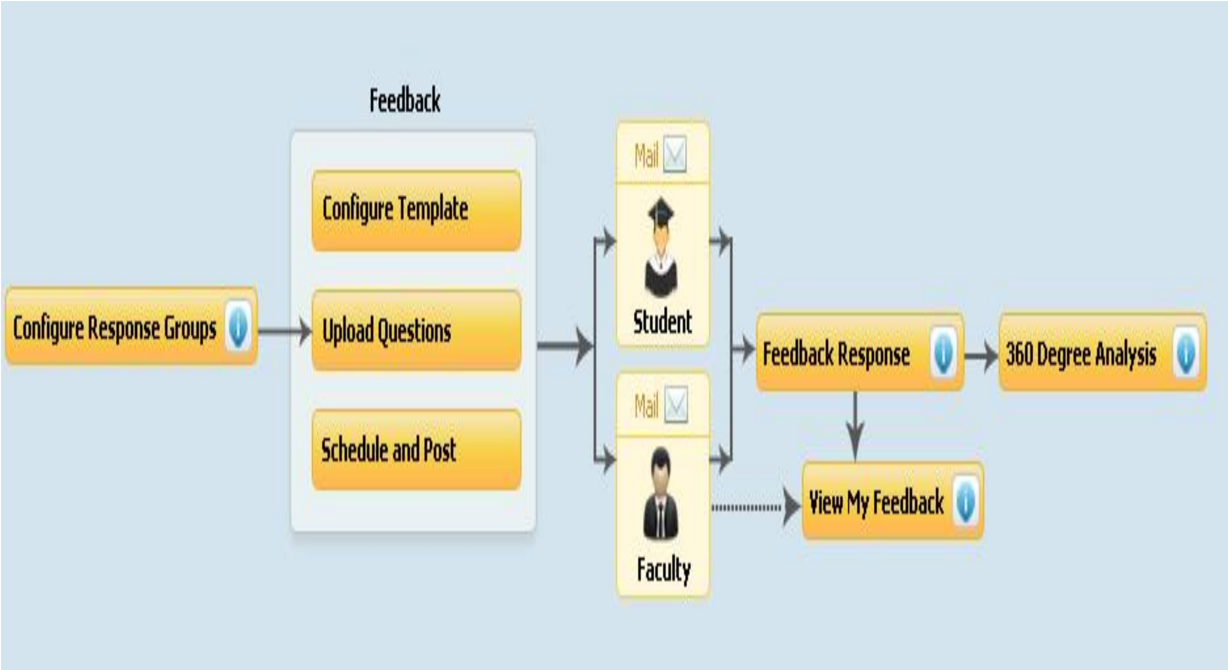
- Settings
- Dashboard

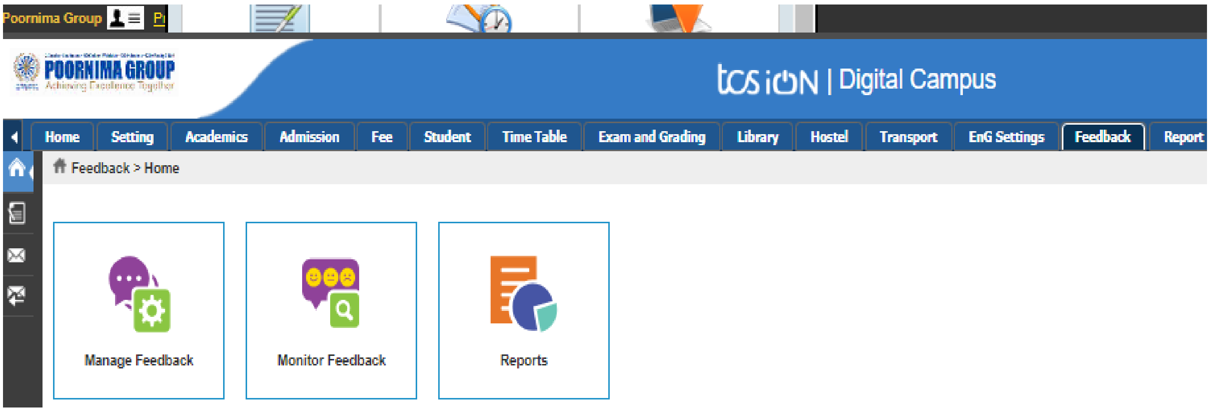
## Process Flow




# Feedback

# Feedback Process Flow




# Overview

**Feedback** is a process in which the effect or output of an action is 'returned' (fed-back) to modify the next action. Feedback is essential to the working and survival of all regulatory mechanisms found throughout living and non-living nature, and in man-made systems such as education system and economy.

The Feedback module allows for capture of feedback at session, course, and general (periodic survey) levels.

For customized feedback requirements, an EForm can be configured to accommodate specific questionnaire templates. The feedback computation logic then provides the ratings on the various parameters that the students or instructors have provided.

Based on the workflow, the feedback goes to the instructors, HODs, and/or SME, invites a response/action taken status and communicates this back to the requestor and/or group.

The details of each transaction in the Feedback cycle are available for view on the 360-degree analysis interface (Student 360) for the requestor student.

## Concept in iON

Feedback is a separate module in TCS iON ERP system, it helps to receive the feedback from student and employee.

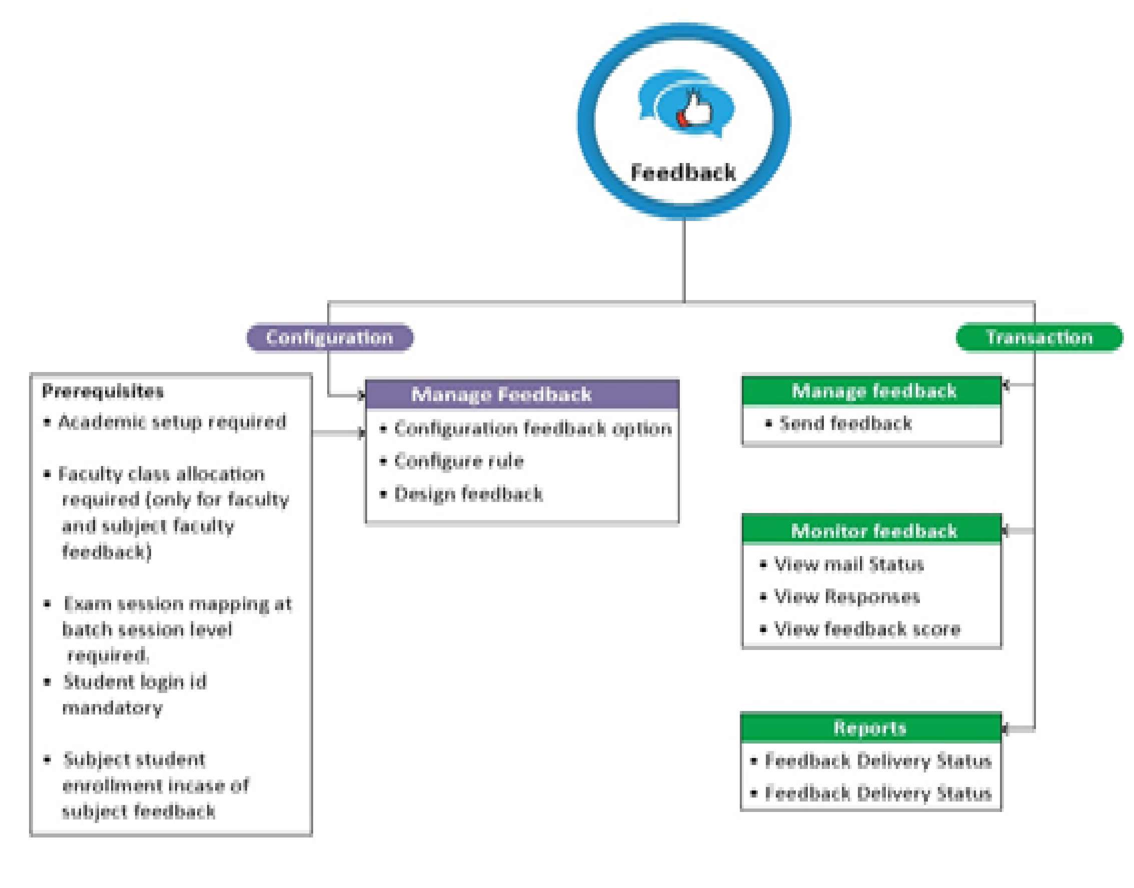
## Process Flow

- **Requirements Understanding**

The Feedback structure details are shared by the customer based on which they are created in the system according organization.

- **Way to Achieve**

The Feedback is created in the system by configuration from front end.




## Steps:

The most important steps of the Feedback module are:

1. Configuring Feedback Option
2. Configuring Feedback Rule
3. Managing the Feedback Response

4. [Viewing Feedback Score Report]
5. [Viewing Mail Status Report]
6. [Viewing Feedback Response]

## Result

The Feedback module is defined.

# iON HelpDesk Solution

It enables iON users to raise Tickets or Change Requests (CRs) to clarify functional queries or to register issues encountered in the daily transactions. Depending upon your role in the organization either as an admin user or general user, you can view or access certain functionalities in HelpDesk solution.

**Steps to Configure HelpDesk**
In order to make Helpdesk work for an organization, we need to input the master data. The following pages explain the steps to be taken, before you can start making transactions.

- Create Problem Category
- Create Problem Type
- Create Problem Item
- Create Severity
- Create Ticket Workflow
- Create Change Area
- Create Change Module
- Create Change Item
- Create Change Request Workflow
- Create Auto Escalation


The key features of the iON HelpDesk are:

- **Defined CTIS for Tickets**: The ticket parameters such as Problem Category/Type/Item/Severity (CTIS) can be defined in the Manage Ticket Data module.

- **CRs For Defined Parameters**: The change request parameters such as Change Area, Change Module and Change Item can be defined in the Manage Change Request module.

- **Assign Workflow**: Workflow is defined to assign people to the group of Experts, Supervisors, Escalation and Implementer using the CR Workflow screen.

- **Escalation for Tickets**: When a ticket is raised and if no action is taken on the ticket for a long time, the ticket can be auto-escalated.

- **Delegation of Tickets**: When a ticket is raised and if the reviewer is not present to take action on the ticket for a long period, then the reviewer can delegate the ticket/CR to another reviewer to take action on it.

**Ticket**

The Ticket screen allows you to perform the following tasks:

- Raising a Ticket
- Editing/Deleting a Ticket

## Raising a Ticket

**Pre-requisites before raising a ticket**:

- The organisation must have the Problem Category, Problem Type, Problem Item defined in Manage Ticket Data module.
- Ticket Workflow must also be defined.

To raise a ticket:

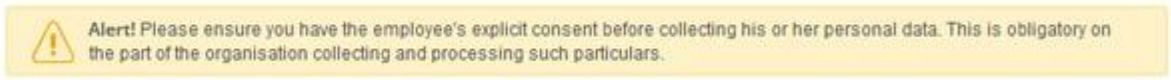
1. Go to **Ticket Data** >> **Ticket** >> **Raise Ticket**.
2. Click **Create**.
3. Enter the required details in the **Personal Details** section. Some personal details of an associate will auto populate on the screen.

   **Note:** The icon next to the fields such as **Email ID** and **Telephone No** displays the purpose for which the data is captured.

4. In the **Ticket Information** section, enter the ticket details. Start with the **Problem Title**.
5. Enter **Requestor** name if the ticket is being raised for staff who does not have access to the HelpDesk solution.
6. Select the appropriate **Problem Category, Problem Type, Problem Item** and **Severity** from the respective drop-down lists.
7. Enter the elaborate problem description in **Problem Summary** and **Additional Information**.
8. Enter document details if any document is to be attached to the ticket. You can attach txt, doc, jpeg and zip files only. Browse and upload the document from your computer.

Only the person assigned to resolve the ticket will be able to enter solution details in the Solution text box. Other users can only view the solution details.

Before saving the details, you will view the following consent message.




10. Click **Save** to submit the ticket. A unique number is assigned to every ticket for effective tracking of requests.

**OR**

Click **Cancel** to exit from the screen without saving any changes.

To reuse the most frequently used parameters for raising tickets, you can use the **Save Template** option.

i. After entering information in all fields, click the **Save Template** link.
ii. Enter **Template Name**.
iii. Click **Save Template**.
iv. Select the **Set as Default** option if you want the selected template to be displayed when raising a ticket.
v. Select the desired template from **My Templates** drop-down list.

The selected parameters will populate in the screen.

**Edit label** provides you with an option to change the buttons names, fields names, etc in current screens or all screens in the solution, thus enabling you to customise the solution to suit your organisation's requirements. To do so:

1. Click **Edit Label**.
2. Rename the fields labels as desired.

**Editing/Deleting a Ticket**

1. Go to **Ticket Data** >> **Ticket** >> **Raise Ticket**.
2. Enter the data in the respective text boxes and click **Search**. The search result corresponding to the data entered is displayed.

It is quicker and easier to search tickets on basis of their 'Status', such as Resolved, Attended By, New, etc. This eliminates the need to search manually through pages and saves you time by avoiding browsing through the search results.

**OR**

Click **Search** directly without entering the data to view all records. The search results will be displayed with status of the ticket under the Status column. Refer the FAQ/Troubleshooting section on how to check status of any ticket raised.

You can save your most frequently used search and use whenever required. To do so:

i. Enter the search parameters and click **Save Filter** link.
ii. Enter the **Filter Name**.

iii. Click **Save Filter**.
iv. Select the desired filter from **My Filters** drop-down list and click **Search**. This will populate the search screen with the parameters chosen and display the search result accordingly.

3. Select the desired ticket.
4. Click **Delete** to delete the ticket.

**OR**

Click **Edit** to view the ticket details.

5. Enter **Comments**.
6. Click **Update** to modify the desired field.
7. Click **Save** to submit the ticket.

Save button is visible only for tickets in 'Request For Revision' status.

**OR**

Click **Reopen** if the ticket has been closed but the issue still persists.

**OR**

Click **Close** to exit from the screen without saving any changes

**OR**

Click **Workflow History** to view the current status of the ticket and the person who has attended it.

**Search Ticket**

The ticket screen allows you to perform the following tasks:

- Search Ticket
- Save Filter
- Edit Ticket
- View Ticket
- Export Ticket

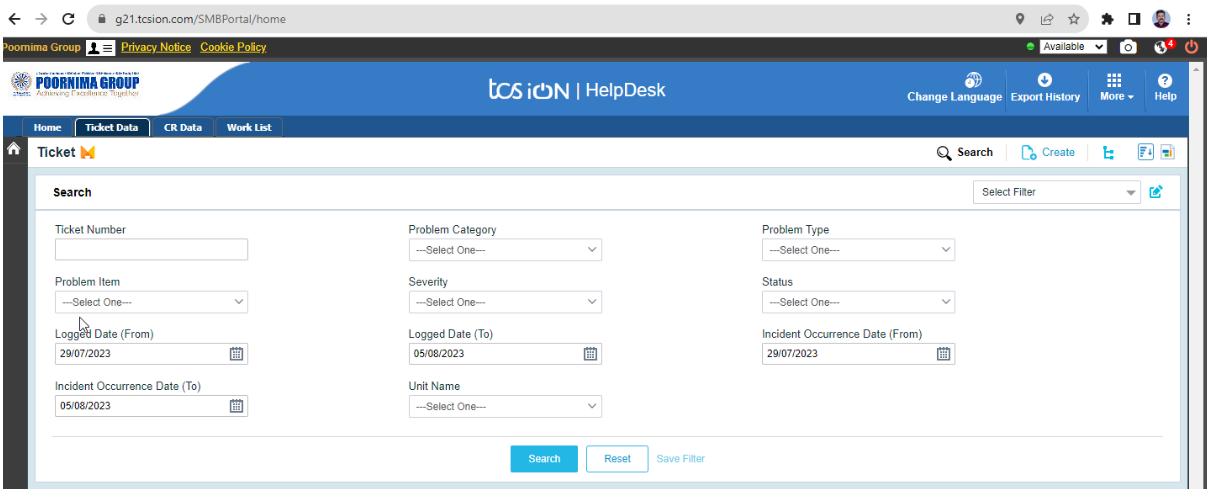
**Search Ticket**

To search a ticket:

1. Go to **Ticket Data**.
2. Select **Search Ticket**.
3. Search Ticket page appears.
4. Select the required details for given fields for desired search result.

| **Fields** | **Description** |
|---|---|
| Ticket Number | Enter the Ticket number generated for the ticket |
| Account Name | Select the Account from the dropdown for which the ticket is logged |
| Service Impact Category | Select the service category that is impacted by the ticket |
| Problem type | Select the Problem type for which the ticket is logged |
| Severity | Select the severity of the ticket |

| Fields | Description |
|---|---|
| Status | Select the status of the ticket |
| Logged Date (From) | Select the From date range |
| Logged Date (To) | Select the To date range |
| Incident Occurrence Date (From) | Select the From occurrence date |
| Incident Occurrence Date (To) | Select the To occurrence date |
| Provider Circuit ID | Select the provider circuit of for the ticket |




It is quicker and easier to search tickets on basis of their 'Status', such as Resolved, Attended By, New, etc. This eliminates the need to search manually through pages and saves you time by avoiding browsing through the search results.

**OR**

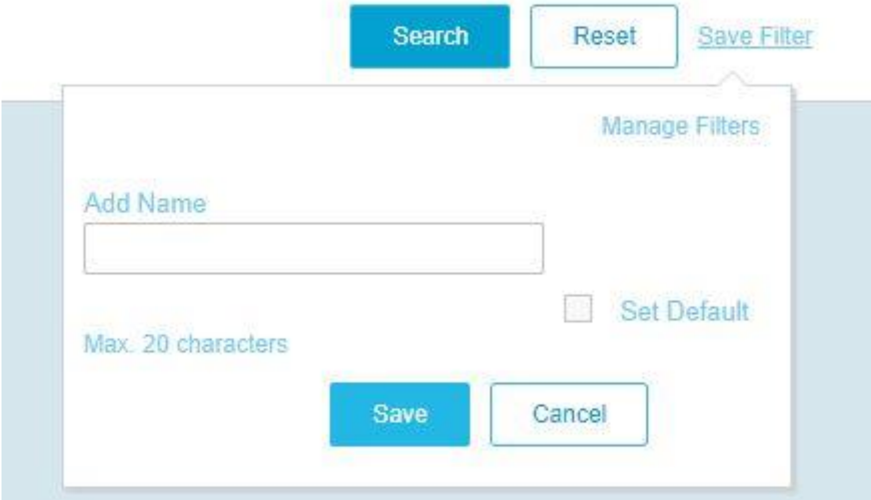
Click **Search** directly without entering the data to view all records. The search results will be displayed with status of the ticket under the Status column. Refer the FAQ/Troubleshooting section on how to check status of any ticket raised.

### Save Filter

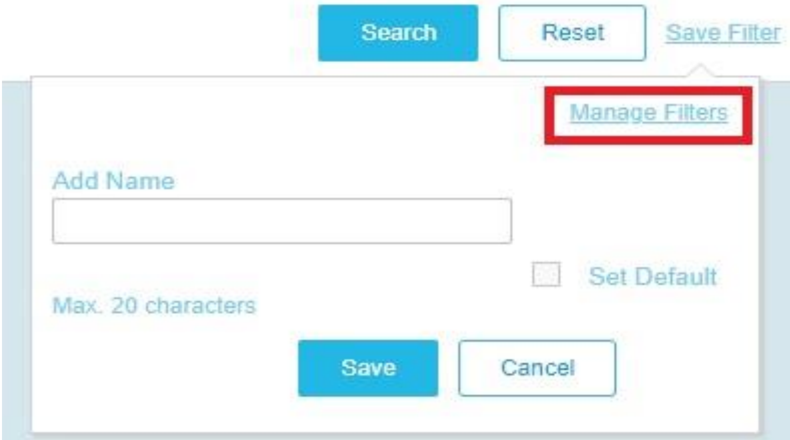
You can save your most frequently used search and use whenever required. To do so:

**Add New Filter**

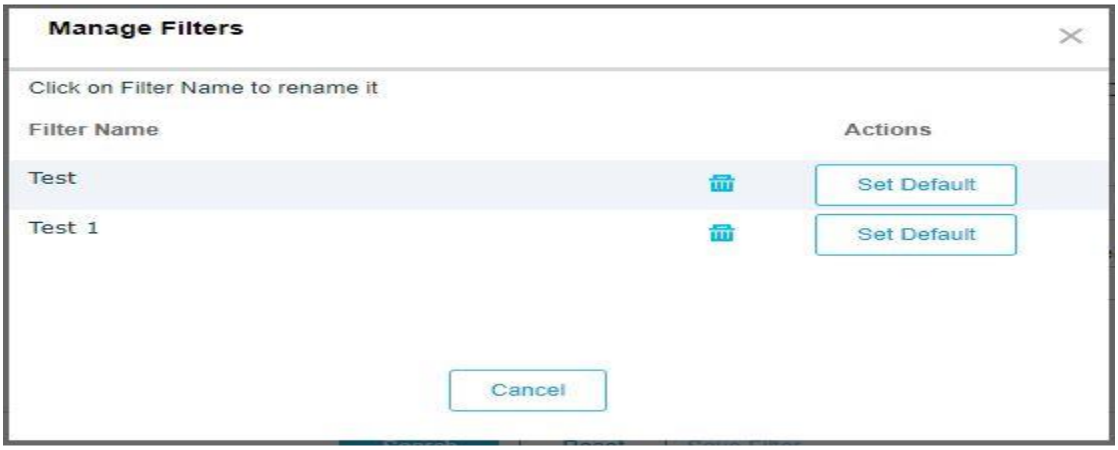
1. Enter the search parameters and click **Save Filter**.
2. Enter the **Filter Name.**
3. Click **Save Filter.**
4. Select the **Set Default** checkbox to save the filter as default.
5. Select the desired filter from **My Filters** drop-down list and click Search. This will populate the search screen with the parameters chosen and display the search result accordingly.




**Manage Filter**



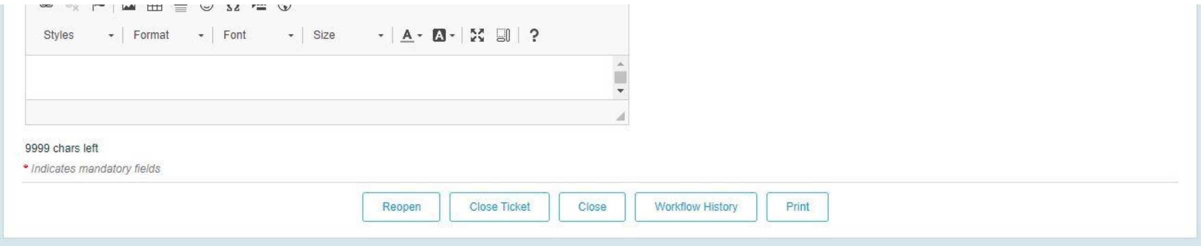

1. Click on **Manage Filter**.
2. A popup with list of saved filters appears.




3. Select a filter to **Set as Default** or **Delete.**
4. Click **Close** to go back on search screen.

**Edit Ticket**

To Edit a ticket:




1. Go to **Ticket Data** >> **Search Ticket.**
2. Enter the data in the respective filters and click **Search**. The search result corresponding to the data entered is displayed.
3. Select the desired ticket.
4. Click **Edit** to edit the ticket details.
5. Edit the required details and select the action from, **Resolve**, **Escalate**, **Request for Revision**, **Convert to CR**, **Ticket OnHold**, **Update**, **Close**, **Workflow History** and **Print**.
6. Success notification on action taken is displayed

**View Ticket**

To View a ticket:

1. Go to **Ticket Data** >> **Search Ticket.**
2. Enter the data in the respective filters and click **Search**. The search result corresponding to the data entered is displayed.
3. Select the desired ticket.
4. Click **Edit** to edit the ticket details.
5. Click **View** to view the ticket details.
6. Once viewed, click **Cancel** to go back on search screen.

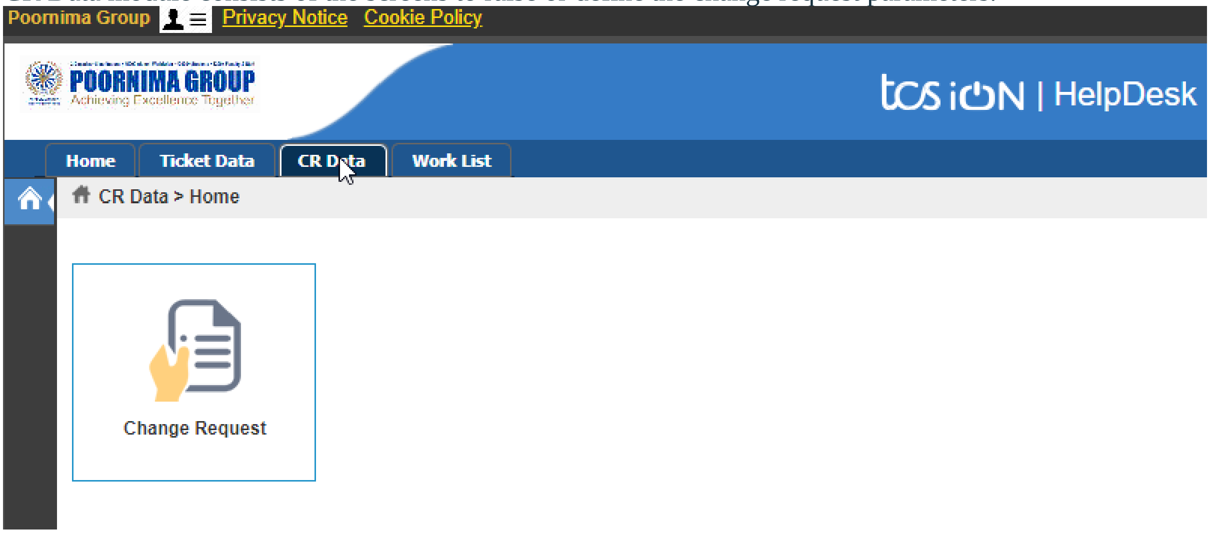
**Export Ticket**

To Export a ticket:


1. Go to **Ticket Data** >> **Search Ticket.**
2. Enter the data in the respective filters and click **Search**. The search result corresponding to the data entered is displayed.
3. Select the desired ticket.
4. Click **Edit** to edit the ticket details.
5. Click **Export**, select the export mode from **Save to cloud**, **Download** and **Email**.

# CR Data

CR Data module consists of the screens to raise or define the change request parameters.




# Change Request

The Change Request screen allows you to perform the following tasks:

- Raising a Change Request
- Editing/Deleting a Change Request

## Raising a Change Request

**Pre-requisites before raising a CR**:

- The organisation must have the Change Area, Change Module, Change Item defined in Manage Change Request module.
- CR Workflow must also be defined.

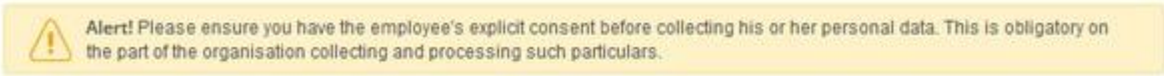
To raise a CR:

1. Go to **CR Data** >> **Change Request** >> **Raise Change Request**.
2. Click **Create**.
3. Enter the required details in the **Personal Details** section. Some personal details of an associate will auto populate on the screen.

   **Note:** The icon next to the fields such as **Email ID** and **Telephone No** displays the purpose for which the data is captured.

4. Enter the **Change Request Title**.
5. Select the appropriate **Change Area, Change Module, Change Item** and **Client Approval** from the respective drop-down lists.
6. Enter **Change Request Description, Change Summary**, **Benefits by Implementing CR**, **Loss if not Implemented**.
7. Enter the **Deployment Start Date** and **End Date** using the calendar icon.
8. Enter document details if any document is to be attached to the CR. You can attach txt, doc, jpeg and zip files only. Browse and upload the document from your computer.
9. Click **Save** to submit the Change Request.

**Before saving the details, you will view the following consent message.**




**A unique number is assigned to every change request for effective tracking of requests.**

**OR**

Click **Cancel** to exit from the screen without saving any changes.

**Editing/Deleting a Change Request**

1. Go to **CR Data** >> **Change Request**.
2. Enter the data in the respective textboxes and click **Search**.

The search result corresponding to the data entered is displayed.

**OR**

Click **Search** directly without entering the data to view all records.

The search results will be displayed with status of the CR under the Status column. Refer the FAQ/Troubleshooting section on how to check status of any CR raised.

3. Select the desired CR.
4. Click **Delete** to delete the CR.

**OR**

Click **Edit** to view the CR details.

5. Enter **Comments**.
6. Click **Workflow History** to check the current status of the CR.

**OR**

Click **Update** to save changes made to any of the fields on the screen.

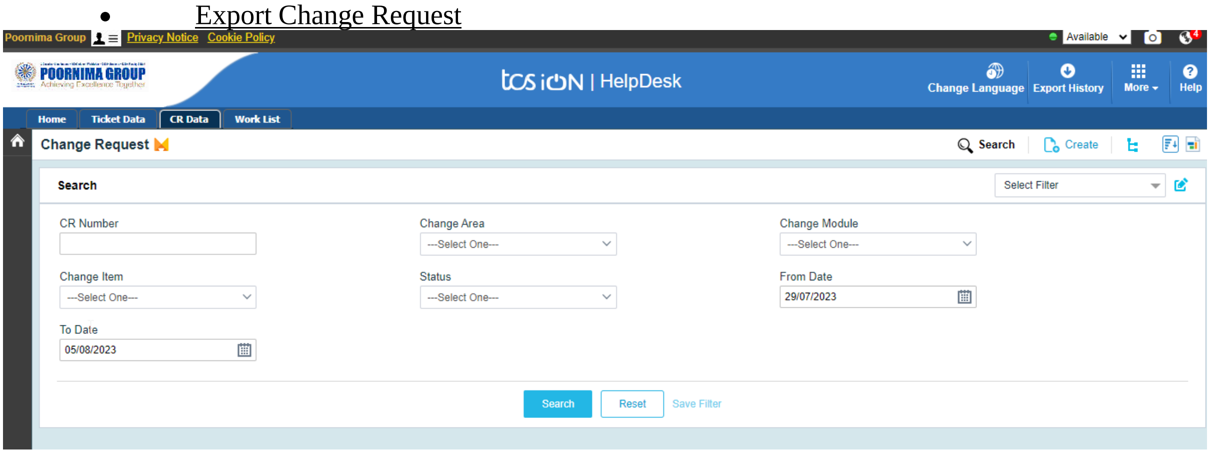
**OR**

Click **Close** exit from the screen without saving any changes

# Search Change Request

The Search Change Request screen allows you to perform the following tasks:

- Search Change Request
- Save Filter
- Edit Change Request
- Delete Change Request
- Export Change Request

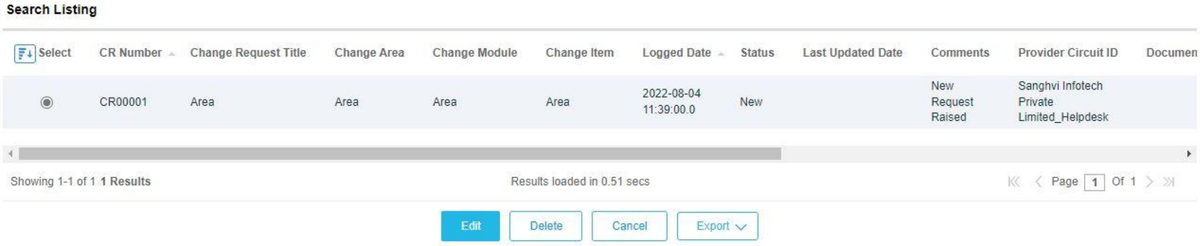



## Search Change Request

To search a CR:

1. Go to **CR Data**.

2. Select **Search CR**.
3. Search CR page appears.
4. Select the required details for given fields for desired search result.
5. Click Search
6. Search results apears.
7. Select the action to be performed Edit, Delete, Cancel and Export.

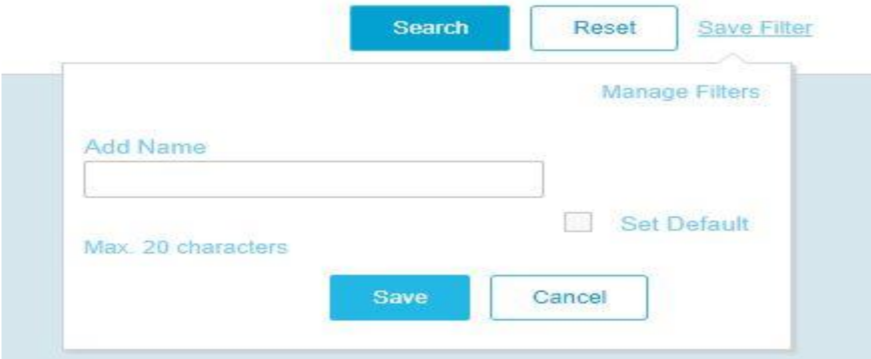



## Save Filter

### Add New Filter

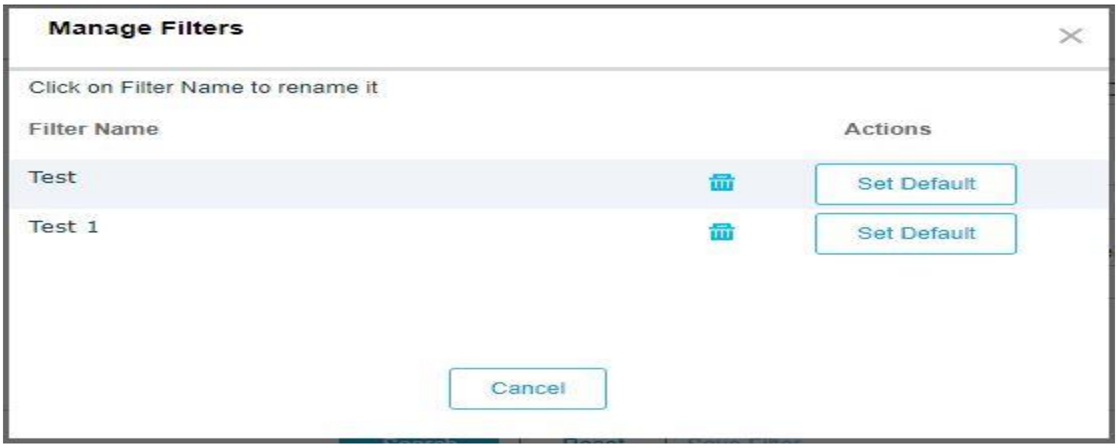
You can save your most frequently used search and use whenever required. To do so:

1. Enter the search parameters and click **Save Filter** link.
2. Enter the **Filter Name**.
3. Click **Save Filter**.
4. Select the **Set Default** checkbox to save the filter as default.
5. Select the desired filter from **My Filters** drop-down list and click Search. This will populate the search screen with the parameters chosen and display the search result accordingly.




**Manage Filter**

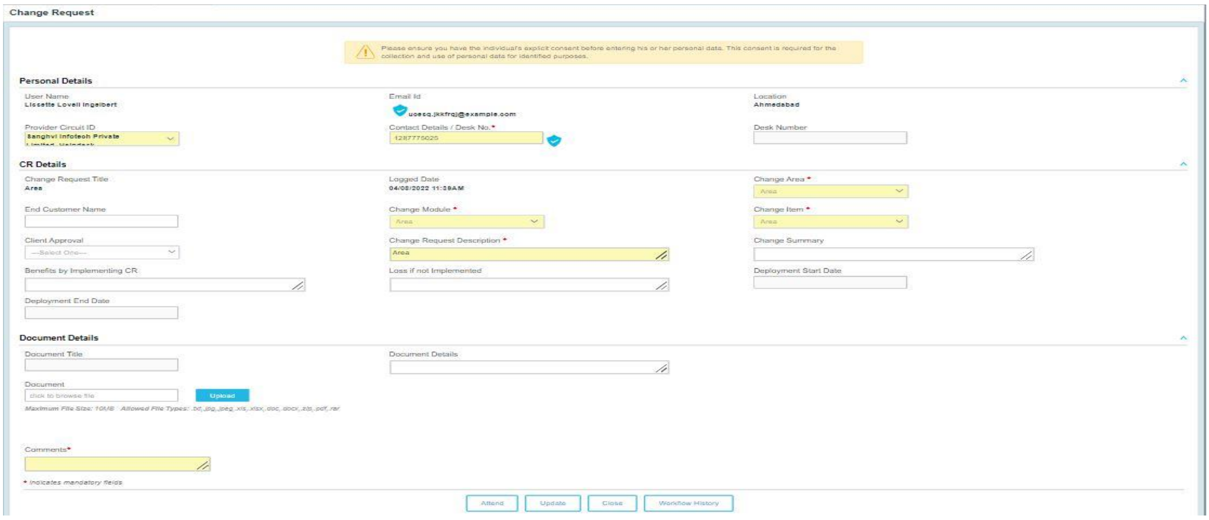

1. Click on **Manage Filter.**
2. A popup with list of saved filters appears.




3. Select a filter to **Set as Default** or **Delete**.
4. Click **Close** to go back on search screen.

## Edit Change Request

To Edit a CR:




1. Go to **CR Data >> Search CR.**
2. Enter the data in the respective filters and click **Search**. The search result corresponding to the data entered is displayed.
3. Select the desired CR.
4. Click **Edit** to edit the CR details.
5. Edit the required details and select the action from

**Attend**: To attend the CR and resolve
**Update**: To update the CR details
**Workflow History**: To check the status of the CR.

6. Provide a comment for the CR.
7. Success notification on action taken is displayed

## Delete Change Request

To Delete a CR:

1. Go to **CR Data >> Search CR.**
2. Enter the data in the respective textboxes and click Search.

3. The search result corresponding to the data entered is displayed.
OR
Click Search directly without entering the data to view all records.
4. Select the desired CR.
5. Click Delete to delete the CR.
6. Success notification on action taken is displayed

### Export Change Request

To Export a CR:


1. Go to **CR Data >> Search CR.**
2. Enter the data in the respective filters and click **Search**. The search result corresponding to the data entered is displayed.
3. Select the desired CR.
4. Click **Export**, select the export mode from **Save to cloud**, **Download** and **Email**.

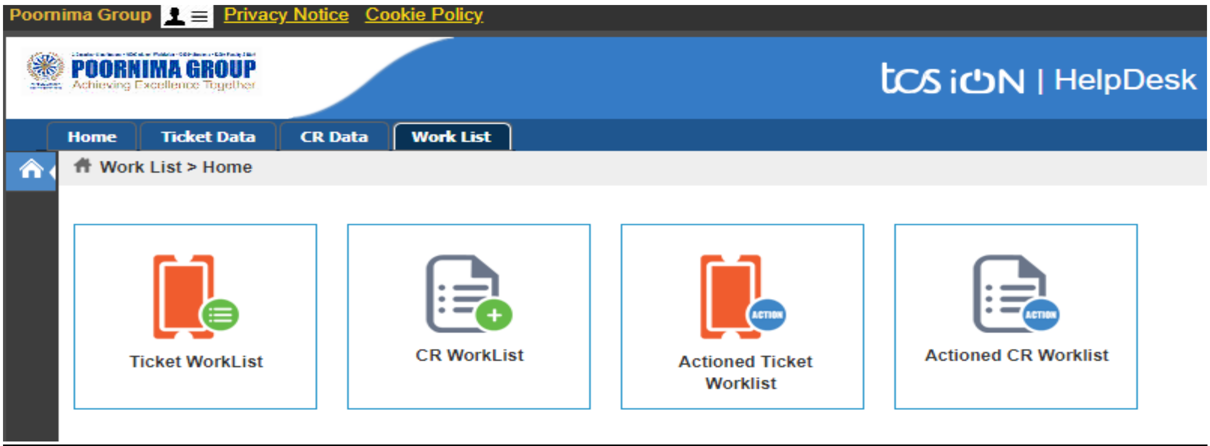
# Manage Change Request

Manage Change Request is used for creating Change Area, Change Modules, Change Item and defining CR Workflow for change requests.
You can create and manage the following components from this screen:

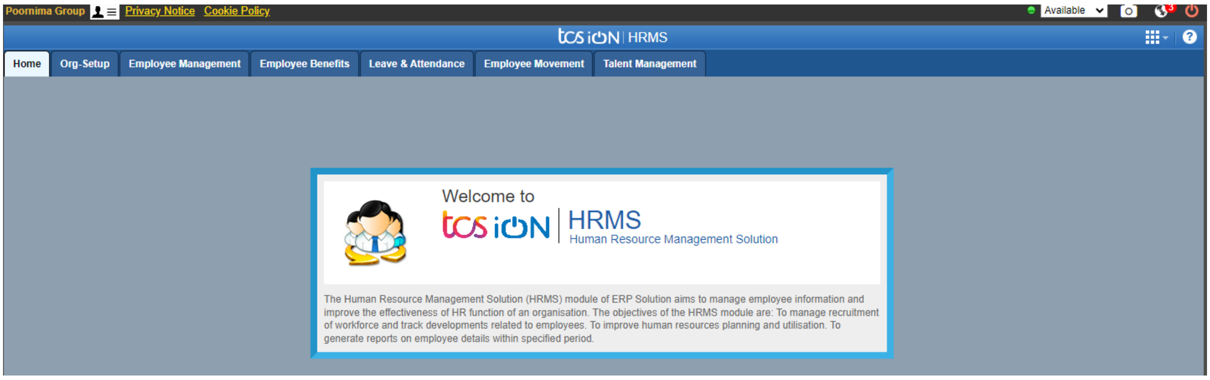
- Change Area
- Change Module
- Change Item
- CR WorkFlow

# Work List

After a ticket or a CR is raised, it appears in the workflow of the person assigned to resolve tickets or approve and implement or reject CRs. You can view the Tickets/CRs pending in your worklist from the Ticket/Change Request Worklist screens.



# HRMS Solution




## About the Solution

iON Human Resource Management Solution (HRMS) simplifies and automates HR functions. iON HRMS is modelled on industry wide HR practices and comprises of HR processes that help utilize the full potential of an organisation's human resources. The solution covers the entire employee lifecycle, from recruitment through various phases of resource management to talent retention and development. The automated HR functions in the iON HRMS solution help improve the operational efficiency, productivity, workforce management and utilization of HR personnel while reducing HR related administrative manual tasks, costs and paper-work.

The key features of iON HRMS Solution are:

- **Master Level Data Configuration**: The HR administrator can configure master level data in the solution, which is linked to various modules in the iON HRMS solution. These master level configurations are prerequisites or mandatory settings for transactions within the iON HRMS solution. Data for masters can be either defined from the front end or can be uploaded from data templates.

- **Recruitment Management**: This feature helps the HR department of an organization to manage the recruitment process and talent acquisition. The recruitment module helps you to manage the various tasks related to recruiting applicants such as publishing the vacancy, defining the job details, entering applicant experience details, creating or generating an employee record, defining their Cost-To-Company (CTC) and so on. Recruitment is a set of processes for converting an applicant to an employee.

- **Employee Information Management**: Employee management or employee information maintenance is one of the key functions of a HRM solution. Employee related information, such as personal details, contact details, previous job experience and gratuity or PF nomination details, and so on, are saved as employee records in the solution. This forms as a central repository for all employee information either personal or company specific, which enables the administrator to manage and use it as and when required. This feature also helps to manage the benefits and incentives given to employees, leave and attendance. transfers, deputation, separations and so on.

- **Appraisal Management**: This feature enables you to manage and facilitate talent and people growth in the organisation aided by a workflow process that is configurable. You can conduct performance appraisal process and manage trainings for the organisation.

# Org-Setup

**Org-Setup** module helps the HR administrator to configure master level data in the solution, which is linked to various modules in the iON HRMS solution.
Org-Setup information is taken from the customers and configured in the iON HRMS solution.
These master level configurations can be prerequisites or mandatory settings for transactions within the iON HRMS solution. For example, configurations in the Holiday Master screen of Org-Setup module are linked directly with the Leave and Attendance modules.

Org-Setup module can only be accessed by employees with **administrative rights**.

# Transactions

This module consists of the following screens:

- **Calendar Definition**
  - Calendar Master
    This screen is used to define multiple calendar types that can be used in the organisation.
  - Holiday Calendar
    This screen is used to define annual holidays for the organisation, which can be availed by the employees during a calendar year.
  - Holiday Type
    This screen is used to define the different types of leaves/holidays an organisation can use.
- **Classification Details Master**
  This screen is used to group/categorize employees on the basis of designation and grade to form a structural hierarchy within the organisation.
- **Organisation Masters**
  - Country Master
    This screen is used to define country names and city names.
  - Language Master
    This screen is used to define the various languages that are used in the organisation to communicate or used by employees to speak/read/write.
  - Qualification Master
    This screen is used to define the qualification detail of employees.
  - Relation Master
    This screen is used to define relationships for an employee like spouse, children and so on, to capture employees' dependent information.
  - Religion Master
    This screen is used to define various religions practiced by the employees.
  - Skill Master
    This screen is used to define various skill profiles that can be associated to employees with particular skill(s) in the organisation.
  - Work Group Master
    This screen is used to define departments/work groups, which forms the hierarchy of various departments within the organisation.
- **Eligibility Criteria**
  - Configure Eligibility Rules
    This screen is used to specify the eligibility criteria for different employee benefits such as loans, leaves and claims. The eligibility criteria are based on employee designation, category and location, based on employee grade, designation, and reservation category.
  - Manage Eligibility Rules
    This screen is used to view and edit the different eligibility rules that are created in the Configure Eligibility Rules screen.
- **Organisation Configurations**
  - Global Parameters
    This screen is used to configure organisational level settings for various modules. These are a one-time setting, which is applicable throughout the organisation.

- Enable Workflow Fields

  This screen is used to configure the fields which are enabled for the workflow levels defined in the Workflow Configuration screen.
- Workflow Configuration

  This screen is used to configure approval levels for a request, such as leave application, loan application and so on, in the organisation.
- Ledger Integration

  This screen integrates the Leave, Loans, Advances and Claim modules with iON Finance & Accounting (F&A) solution.
- Cost Center Configuration

  This screen is used to map the Cost Centers in iON HRMS solution to the Cost Centers in iON F&A solution.

# Recruitment

**Recruitment** module helps you to manage the various tasks related to recruiting applicants.
For example, publishing the vacancy, defining the job details, entering applicant experience details, creating / generating an employee record, defining their Cost-To-Company (CTC) and so on.
Whenever the applicant has to be selected for a certain job profile, he needs to go through a certain set of processes and if he clears all those levels his role now changes from an applicant to an employee. So recruitment is that set of processes through which you can convert an applicant to an employee.

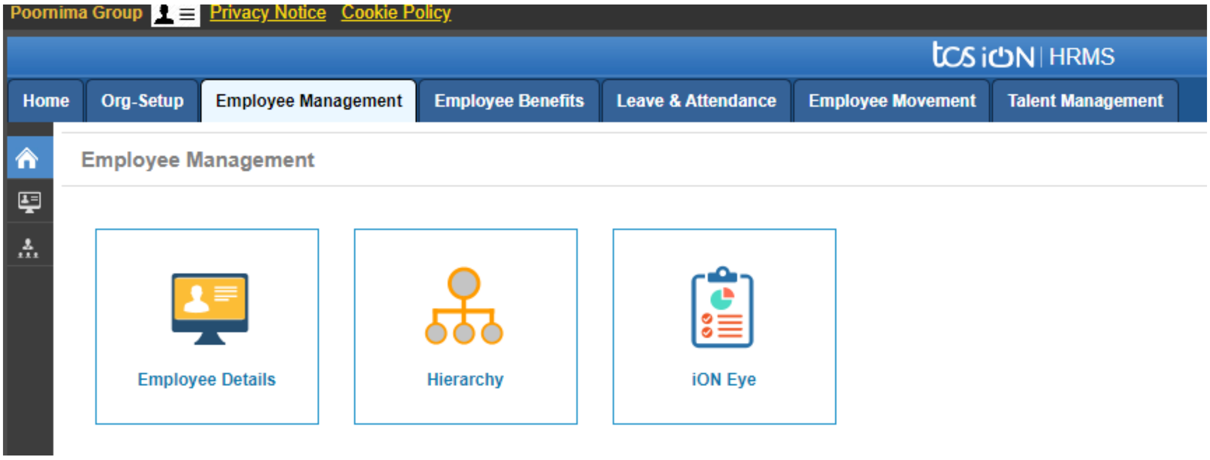
The **Recruitment** module can only be accessed by employees with *ADMINISTRATIVE* privileges

## Transactions

This module consists of the following screens:

- Recruitment Masters
  - Configure Selection Process
  - Define ENGL Master
- Vacancy Management
  - Create Vacancy
  - Raise Online Requisition
  - Manage Online Requisition
- Applicant Management
  - Direct Application
  - eForms Application
- Interview and Selection
  - Scrutinize Applicant
  - Maintain Selection Process
- Offer Management
  - Define and Post CTC
- Employee Record Creation
  - Create Employee
  - Fast Track Employee Creation

# Employee Management




Employee management or employee information maintenance is one of the key functions of a HRM solution. Employee related information, such as personal details, contact details, previous job experience and gratuity/PF nomination details, and so on, are saved as employee records in the solution.
**Employee Management** module in the iON HRMS solution is used to record and display employee information.
This forms as a central repository for all employee information either personal or company specific, which enables the administrator to manage and use it as and when required.

Employees have access only to the following screens in this module:

- Employee Management screen
- Relation Details screen
- Hierarchy screen

Employees can view and edit information in these screens to keep the system updated with their latest details.

## Transactions

This module consists of the following screens:

- Employee Details
  - Employee Management

    This screen is used to record and display employee details in a single screen.
  - Relation Details

    This screen is used to maintain and modify employee dependent details in the solution.
- Employee Mapping
  - Employee-Site Mapping

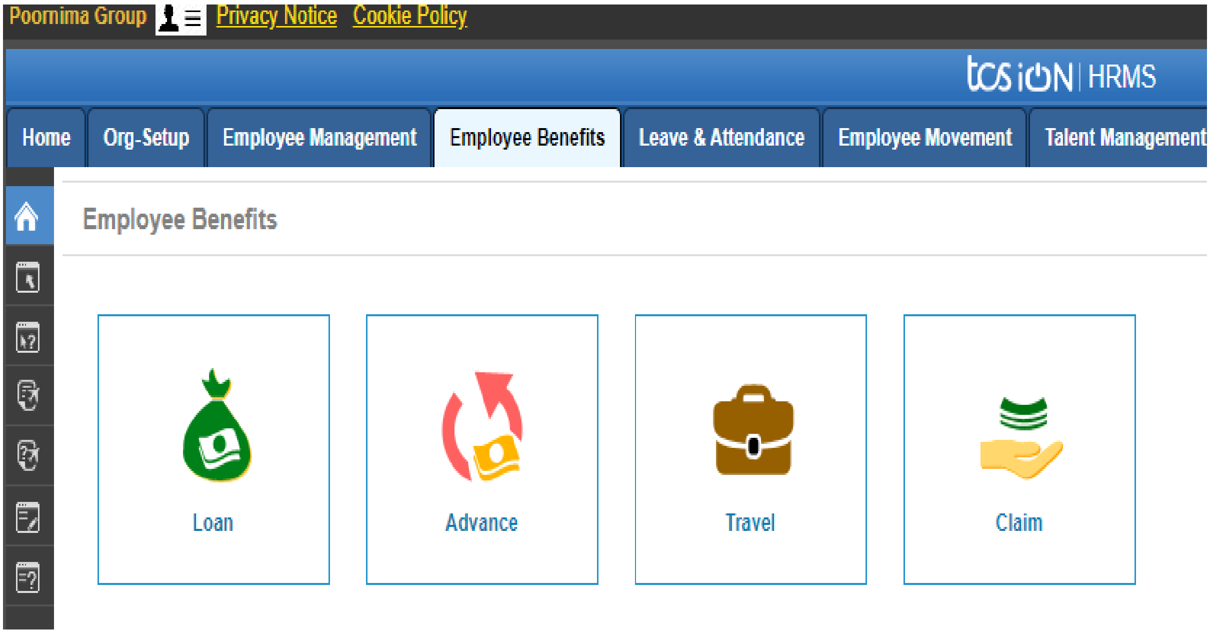
    This screen is used to tag employees to multiple sites for all iON solutions including iON HRMS and iON Payroll solution.
  - Employee-Rest Day Mapping

    This screen is used to define new rest days for employees and view or update the existing rest days set for employees in the organisation.
- Hierarchy

  This screen provides a visual representation of the site and reporting structure in an organisation.
- Disciplinary Action

  This screen is used to maintain all the disciplinary cases initiated against employees in the organisation.

# Employee Benefits




**Employee Benefits** are motivational drivers, which are provided to the employee by the organisation.

These are additional incentives apart from the salary that can be availed by the employee as and when required. Benefits have always played an important role for an employer to attract and retain employees in the organisation.

The following benefits can be availed in the iON HRMS solution:

- Loan
- Advance
- Claim
- Travel
- Asset

The Ledgers in iON HRMS solution are integrated with the iON Finance & Accounting (F&A), which enables direct mapping of Loan, Advance and Claim modules with F&A Cost Centers. This facilitates seamless data integration and smooth functioning between the two solutions.

# Transactions

This module consists of the following screens:

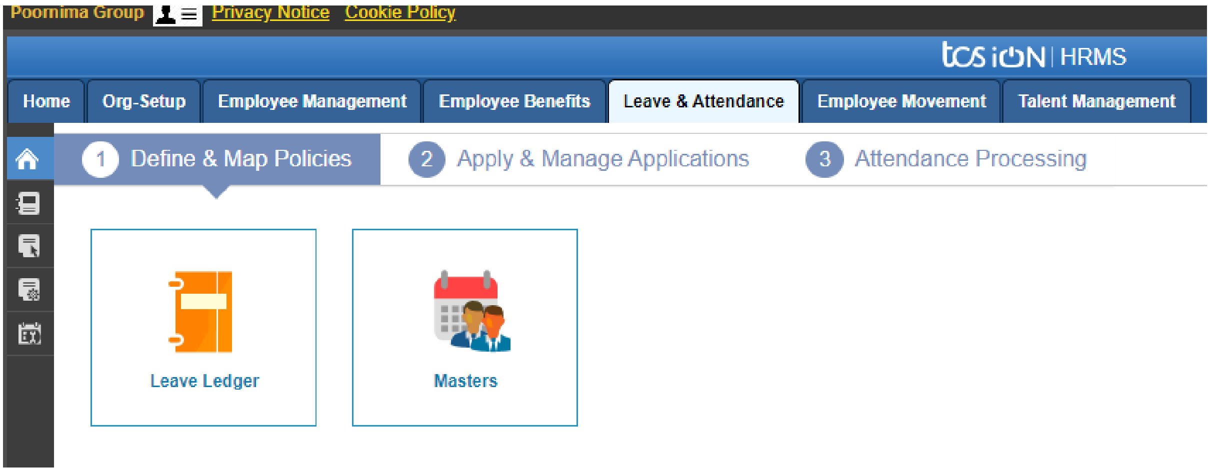
- **Loan**
  - Loan Master
    This screen is used to configure different types of loans in the organisation.
  - Raise Loan Application
    This screen is used to raise a loan application.
  - Manage Loan Application
    This screen is used to track status or perform actions on the loan applications.
- **Advance**
  - Advance Master
    This screen is used to configure different types of advances in the organisation.
  - Raise Advance Application
    This screen is used to raise an advance application.
  - Manage Advance Application
    This screen is used to track status or perform actions on the advance applications.
- **Claim**

- ○ Claim Master
  This screen is used to configure different types of claims in the organisation.
- ○ Raise Claim Application
  This screen is used to raise a claim application.
- ○ Manage Claim Application
  This screen is used to track status or perform actions on the claim applications.

- **Travel**
  - ○ Travel Master
    This screen is used to configure different types of Travel.
  - ○ Raise Travel Application
    This screen is used to raise a travel application.
  - ○ Manage Travel Application
    This screen is used to track status or perform actions on the travel applications.
- **Asset**
  - ○ Asset Master
    This screen is used to define the various departments from which the assets are issued.
  - ○ Raise Asset Application
    This screen is used to raise an asset application.
  - ○ Manage Application
    This screen is used to track/view the status of the asset applications raised by any employee.

# Leave & Attendance

**Leave and Attendance** module is used to configure the leave and attendance policies in the organisation. As per the organisation's leave policies, you can create various leave types, which can be availed by the employees. It also includes functionalities which enable the employee to apply for leaves and leave encashment.
Attendance management in an organisation includes, maintenance of employee shift roster and shift rotation.




# Transactions

This module consists of the following screens:

- Leave Masters
  - ○ Leave Master (Accessible only with administrative rights)
    This screen is used to define the leave types as per the organisations policies.

- Leave Credit (Accessible only with administrative rights)
  This screen is used by the HR administrator to credit leaves to employees in the organisation.

- Leave Ledger (Accessible to all employees)

This screen provides you leave details, such as leave balance, leaves credited, leaves encashed and so on.

- Leave Application Management
  - Raise Leave Application (Accessible to all employees)
    This screen is used by all employees to raise leave applications.
  - Manage Leave Application (Accessible to all employees)
    This screen is used to view the leave applications and take appropriate actions on the same.
  - Raise Leave Encashment (Accessible to all employees)
    This screen is used by all employees to raise leave encashment applications.
  - Manage Leave Encashment (Accessible to all employees)
    This screen is used to view the leave encashment applications and take appropriate actions on the same.
- Leave Attendance Routine
  - Leave Attendance Routine (Accessible only with administrative rights)
    This screen is used to regularize employee attendance before the payroll process is initiated in the organisation.
  - EG/LC Status History
    This screen is used to view employee attendance calculation based on the Early Going (EG) and Late Coming (LC) configurations in the organisation.
- Shift and Scheduling
  - Shift Master
    This screen is used to define the shift, shift timings and the Time and Attendance policy of the organisation.
  - Shift Rotation
    This screen is used to rotate employees mapping to shifts based on the shift types.
  - Employee Shift Roster
    This screen is used to map employees to their respective shifts.
- Attendance Population
  - Attendance Population
    This screen is used to download the attendance data that is uploaded using the iON WebInstaller attendance templates to the HRMS solution.
  - Attendance Populated Log
    This screen is used to view the Attendance Data population status within the organisation.
- Manage Attendance

This screen is used to view and update the attendance history of an employee and retrieve attendance details for a particular period.

- On Duty
  - Raise On Duty Application
    This screen is used to raise On Duty application in the organisation.
  - Manage On Duty Application
    This screen is used to track status or perform actions on the On Duty applications.

# Employee Movement


**Employee Movement** module is used to manage the employee movement in the organisation, that is, either by transfer or deputation to a different location or separation from the organisation.
While Transfers and Deputation is internal movement of an employee within the organisation, Separation is moving out of the organisation.

# Transactions

This module consists of the following screens:

- **Transfer**
  - Raise Transfer Application

  This screen is used to raise a transfer application to move to another location.
  - Manage Transfer Application

  This screen is used to track status or perform actions on the transfer applications.
- **Deputation**
  - Raise Deputation Application

  This screen is used to raise a deputation application.
  - Deputation Order

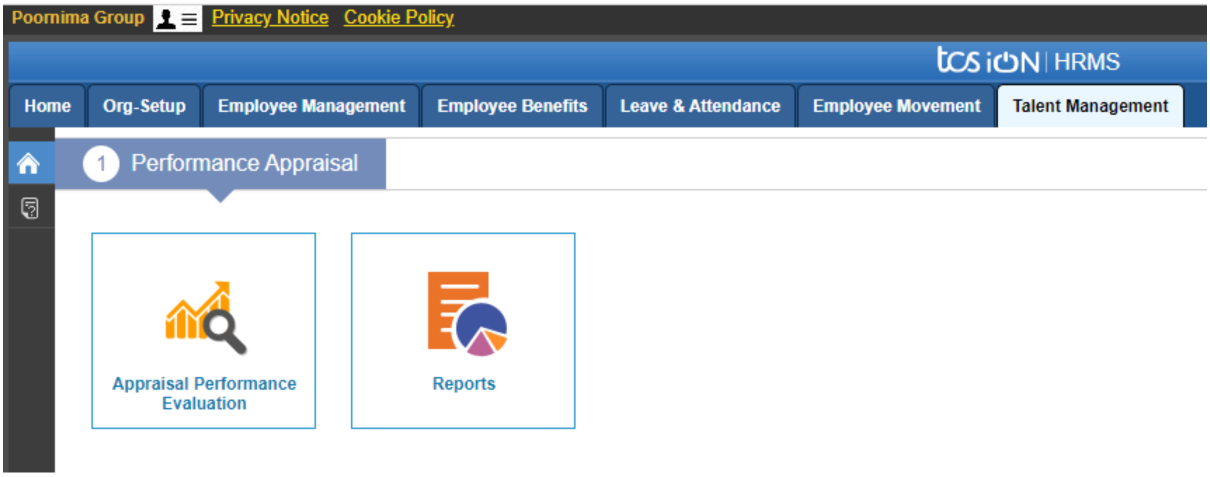
  This screen is used to provide instructions against any deputation application.
  - Deputation Charge Report

  This screen is used to capture handover/takeover details after the deputation is approved.
- **Separation**
  - Raise Separation Application

  This screen is used to raise separation application in the organisation.
  - Manage Separation Application

  This screen is used to track status or perform actions on the separation applications.

# Talent Management




Talent Management module consists of screens that enable you to track and facilitate employee growth in the organisation.
This module enables you to configure employee promotion and trainings in the organisation.

This module consists of the following screens:

- Rating Master
- Appraisal Masters
  - Performance Grade
  - Section Master
  - Goal Category Master
  - Goal Master
  - Define Goal Measures
- Appraisal Performance Cycle
  - Performance Cycle
  - Appraisal Calendar
- Appraisal Template and Mapping
  - Appraisal Template Master
  - Employee to Template Mapping
- Appraisal Performance Evaluation
  - Initiate Employee Appraisal
  - Bulk Initiate Employee Appraisal
  - Manage Employee Appraisal
- Training Masters
  - Training Course Master
  - Institute and Course Details
  - Training Course Budget
  - Faculty Master
- Training Plan
  - Faculty Course Mapping
  - Training Calendar
  - Employee Training Plan
- Course Registration and Nomination
  - Raise Training Application
  - Manage Training Application
- Attendance and Feedback
  - Training Attendance
  - Training Details
  - Feedback Questionnaire Master
  - Training Specific Questionnaire
  - Employee Feedback
- Training History
  - Close Training Course

- Supervisor Employee List
- Overall Training History

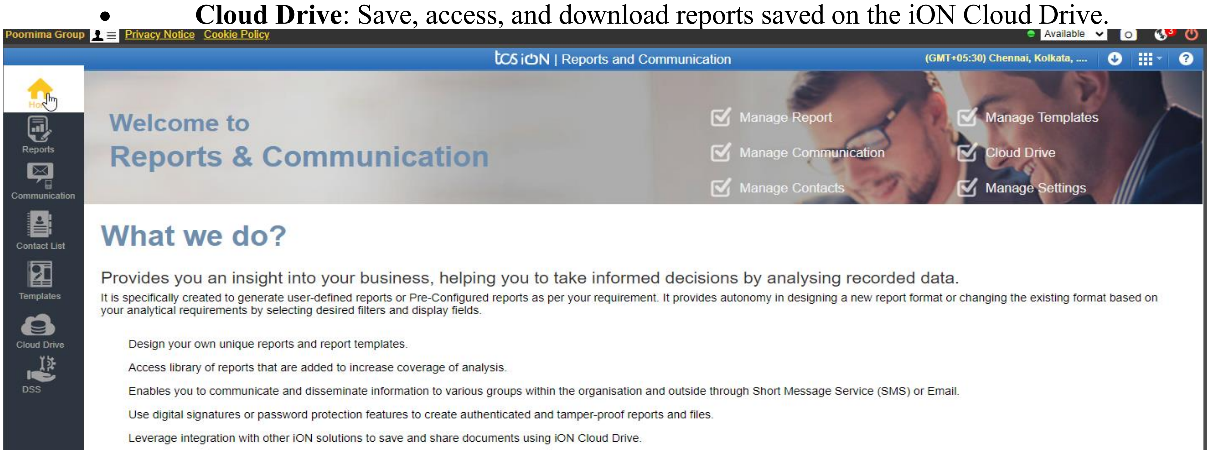
# Report & Communication

## About The Solution

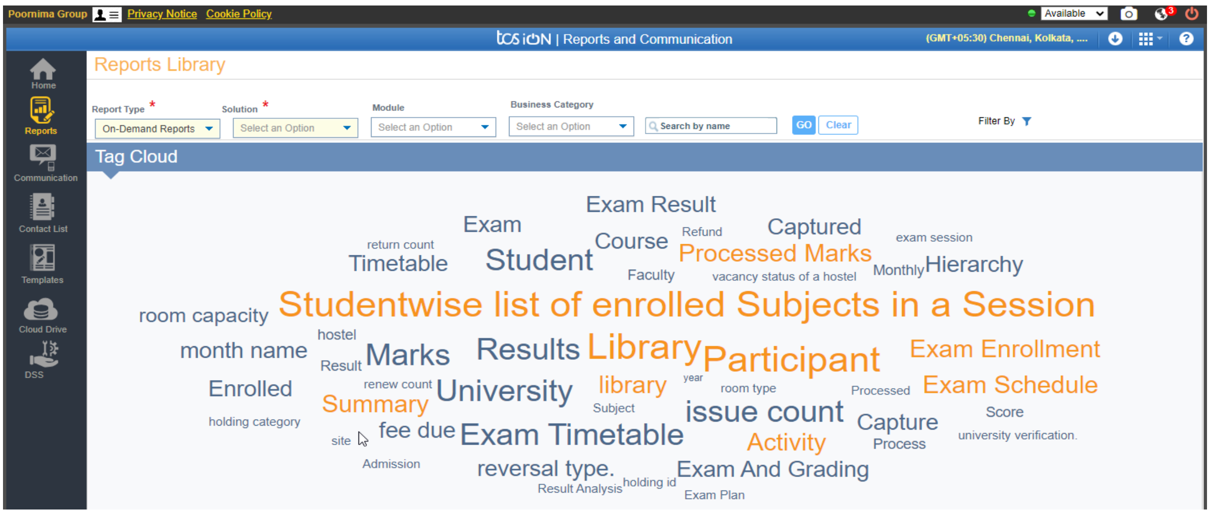
iON Reports and Communication solution caters to the business analytics requirements of the organization. This solution enables you to create reports for analysis and tracking purposes. iON provisions solution-wise report templates that are readily available for use in your organisation. Additionally, this solution enables you to communicate and disseminate information to various groups within the organisation and outside through Short Message Service (SMS) or Email

The iON Reports and Communications solution provisions:

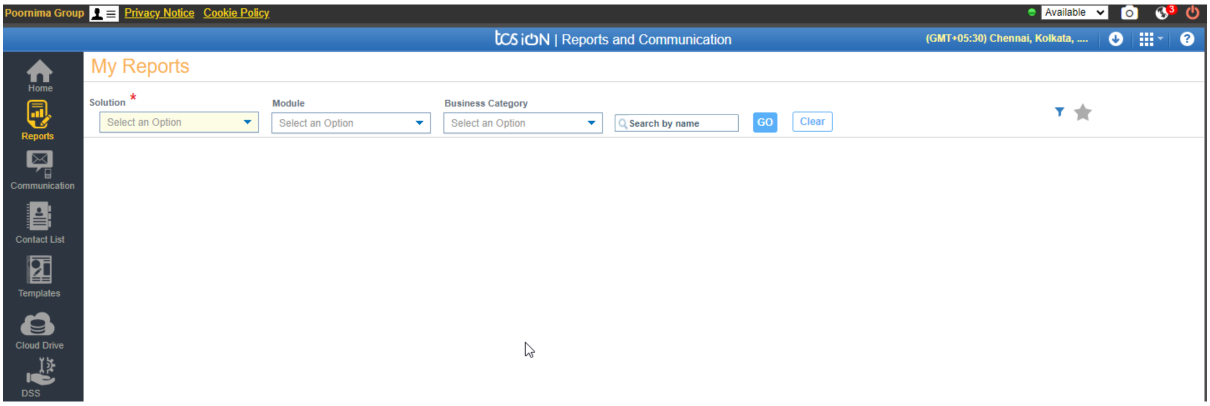
- **On Demand Reports**: Generate/design reports, view saved reports and library of reports for reports provisioned by iON for various solutions.
- **Templates**: Create standard templates for official announcements, communications or letters within an organisation. Increase coverage of analysis by accessing library of report templates.
- **Communications**: Communicate and disseminate information to various groups within the organisation and outside by means of Short Message Service (SMS) or Email communications.
- **Decision Support System (DSS)**: View information related to transactions at run time and take informed decisions for performing the transactions in a solution.
- **Cloud Drive**: Save, access, and download reports saved on the iON Cloud Drive.



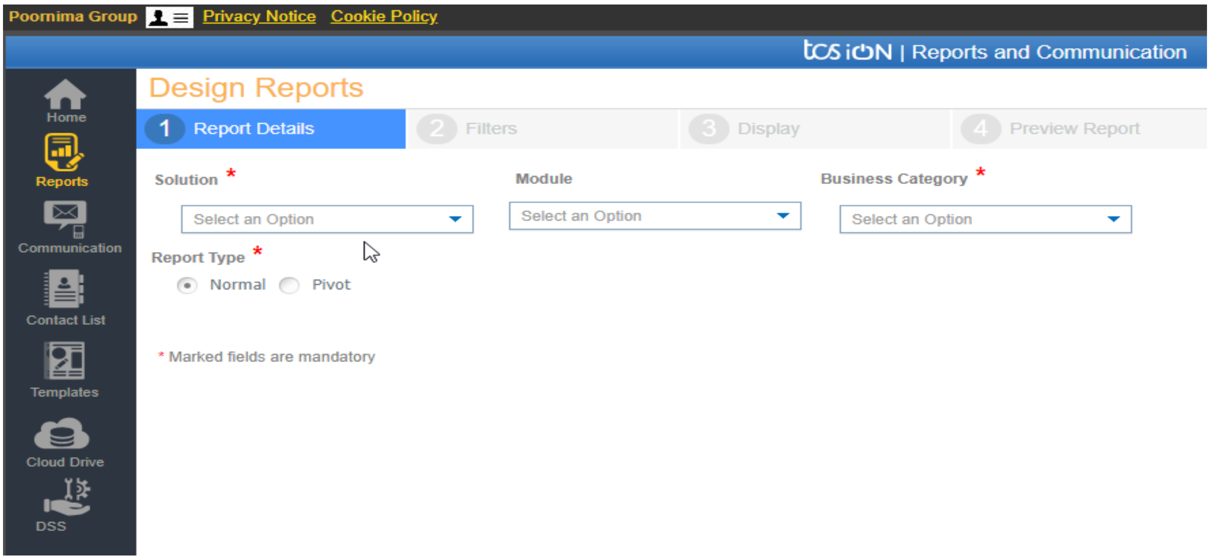

## Report Library



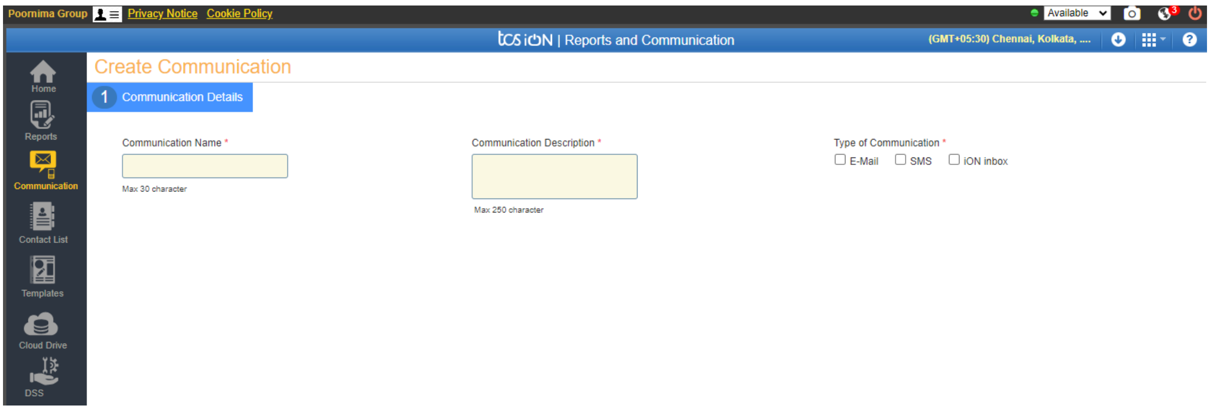
# My Reports



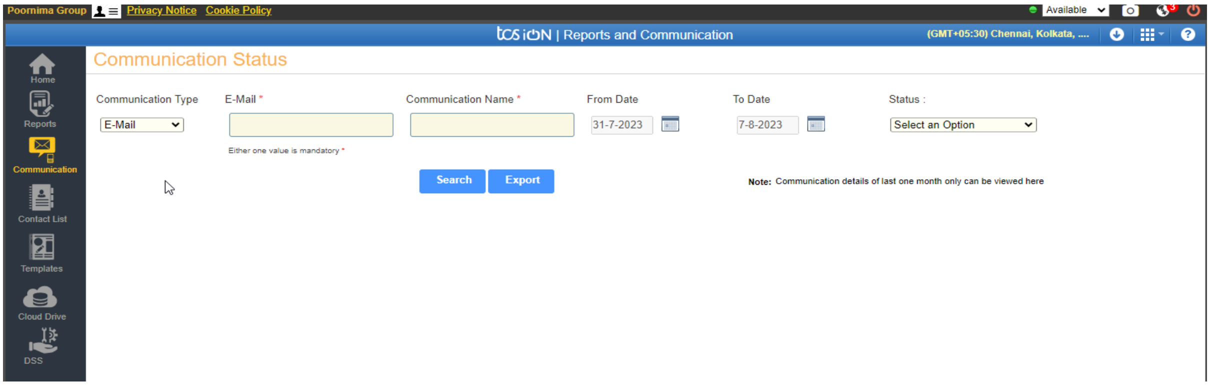

# Design Reports



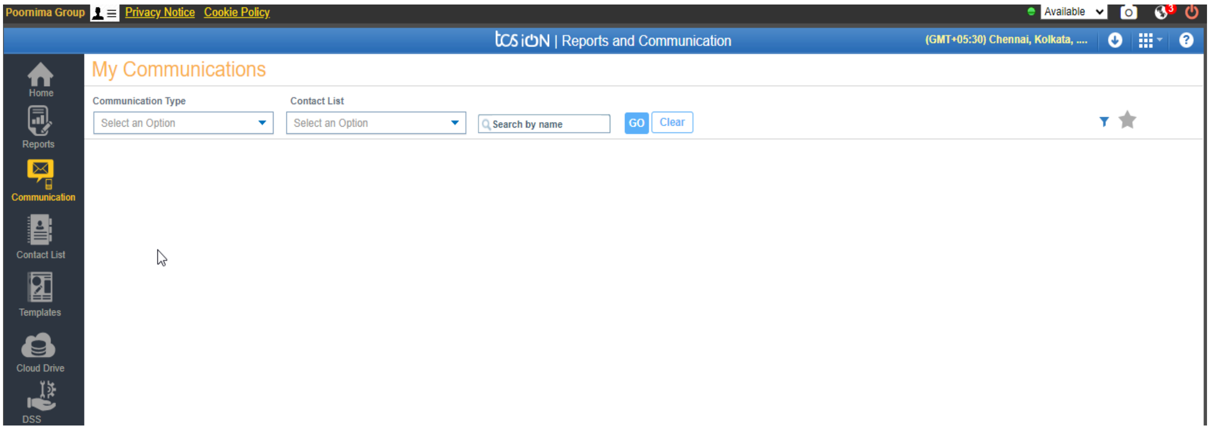

# Create Communications




# Communication Status




# My Communications




# My Reports

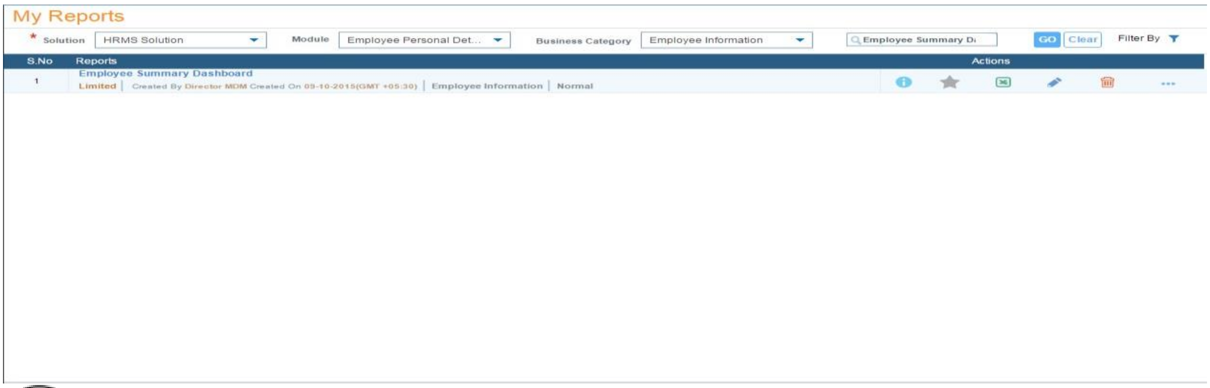
**My Reports** screen displays the reports that are saved in the ***TCS iON Reports and Communication*** solution. These reports are displayed based on the report confidentiality, that is, Public, Private, or Limited, set while saving the report.
For detailed information on Report Confidentiality, see Design Reports screen.
In the **My Reports** screen, you can trigger custom hoks, search and view reports based on the Solution and Business Category. By default, all reports for a selected solution are displayed.

**To search reports:**Click **Reports** >> **My Reports**.


1. In the **Solution** list, select the solution.
2. Do one of the following:
   a. In the **Business Category** list, select a category and click **GO**.
   b. Select a **Module** and click **GO**.

c. Specify a keyword in the Search field and click **GO**.
d. Click **GO** without selecting a Business Category or entering a search query.

The relevant reports are displayed as per the selected details.




You can click the Information icon to view additional information and details about the saved report.

You can further narrow down the search using the **Filters** list options:

- **Recently Used**: This filter display recently used/updated/edited reports.
- **Recently Created**: This filter displays newly created reports.
- **Favourite**: This filter displays reports that are marked as favourites.
- **Created By Me**: This filter displays Private reports that are created by the logged in user.
- **Public**: This filter displays public reports that are created across the organisation by different employees.
- **Limited**: This filter displays Limited reports and are displayed based on the user group of the logged in user.


You can click save the search criteria as Favourite search.
The primary function of this screen is to search and display reports. After you search the reports, you can perform the following actions:

- View Reports
- View Field Descriptions
- Add to Favourites
- Export
- Admin Level Permission For Export Reports
- Edit Report Definition

- Delete Report
- ADD to Quicklinks
- Add to Rule List
- Schedule a Report
- Copy and Edit
- Edit Report Details
- Create Contact List
- Link Report
- Add to Widgets
- Link Transation Screen
- Role Based Access

# View Reports

1. Perform the step by step procedure in the **To search reports** section.
2. Click the report name you want to view.

The report is generated and displayed.

In case the report contains Edit on Runtime filters, specify the filter value and click Generate Report.

For detailed information on **Edit on Runtime** filter, see Design Reports.

## Obtaining Permalink for Reports

Permalinks enable you to quickly open the reports on the browser, instead of opening the report through the Reports and Communications solution. You need to enter the required user credentials to view the report using Permalinks.

To obtain a permalink for a report:

1. Perform the step by step procedure in the **To search reports** section.
2. Click the report name you want to view.

The report is generated and displayed

3. In the top bar, click the permalink icon to view the permalink.

A window displaying the permalink appears.

4. Copy the link and paste it into the browser.

The link directs you to the report. The webpage prompts you for user credentials. Enter the required user credentials to view the report.

# Viewing Field Descriptions

The field descriptions provide you information about various columns in the report.

To view the field descriptions:

1. Perform the step by step procedure in the **To search reports** section.
2. Click the field descriptions icon against the report name for which you want to view field descriptions.

The field descriptions are displayed in a new window.

3. To download the field descriptions in excel format, click **Download Field Details**

# Add To Favourites

1. Perform the step by step procedure in the **To search reports** section.

2. Identify the report you want to add to your favourites and click the **Add to Favourites** icon.

You can view the report in your Favourites using the **Filter** list. To remove a report from the **Favourites** list, click the **Remove from Favourites** icon.

# Export

This action enables you to export the report in Excel or PDF formats and save it locally on your system. You can export 'Raw Data', that is, the detailed report or the 'Pivot Data', in case the generated report contains pivot data.

If the number of columns in the report are greater than hundred then only CSV format of report export is allowed.

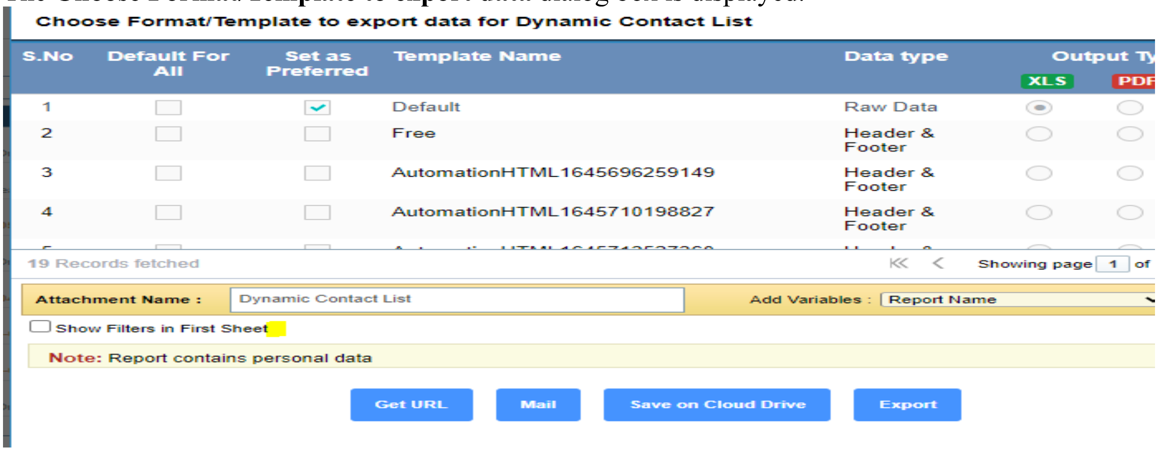
Along with the report data, you can also export templates, such as offline HTML template or the Header and Footer template, which are associated with the report.

When a report is exported, an export job is submitted in the solution. After the job is completed, the exported report is available in the **Download History** screen for download.

To export the report:

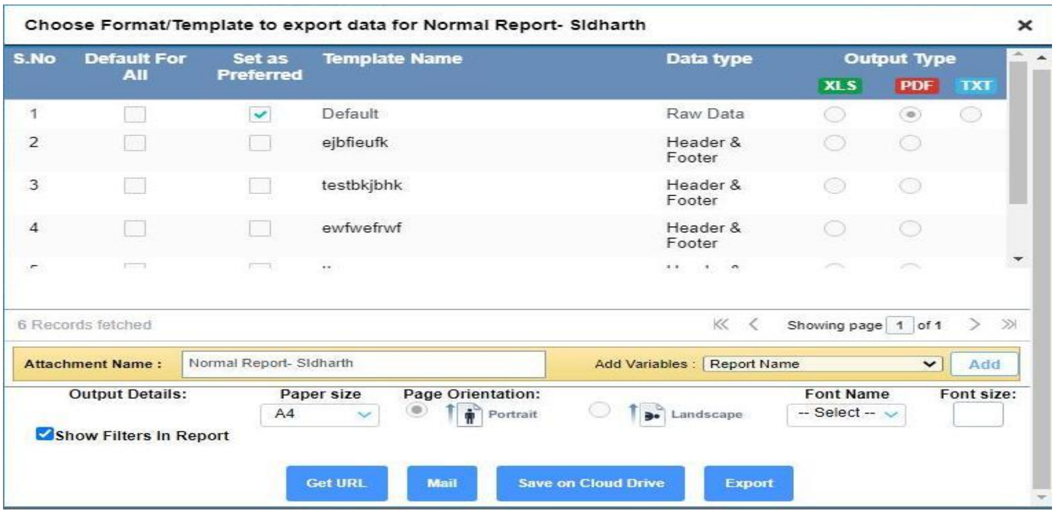
1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to export.
3. In the **Actions** column, click the **Export** icon.

The **Choose Format/Template to export data** dialog box is displayed.




- In case a report contains Edit on Runtime filters, the solution prompts you to set the value before the report is exported. This enables the system to generate a report with updated data based on the selected filter values.
- If you have set a template as the default template for the report, the system displays a message box to confirm whether the default template must be used to export the report. If you click **Yes**, the report is exported in the default template. If you click **No**, you are redirected to the **Choose Format/Template to export data** dialog box. You can then select and specify the template to export the report.

4. In the **File Type** column, do one of the following:
   a. Select **Excel**, to export the report in an excel sheet.
   b. Select **PDF**, to export the report in PDF format. While exporting the the PDF , you can specify the Page size, Page Orientation, Font and Font size for the PDF file.
   If you wish to add a font to the solution, you must contact the *iON Reports and Communication* solution team to configure the same. You can also add fonts of different languages, which enables you to generate the report as per the desired language.



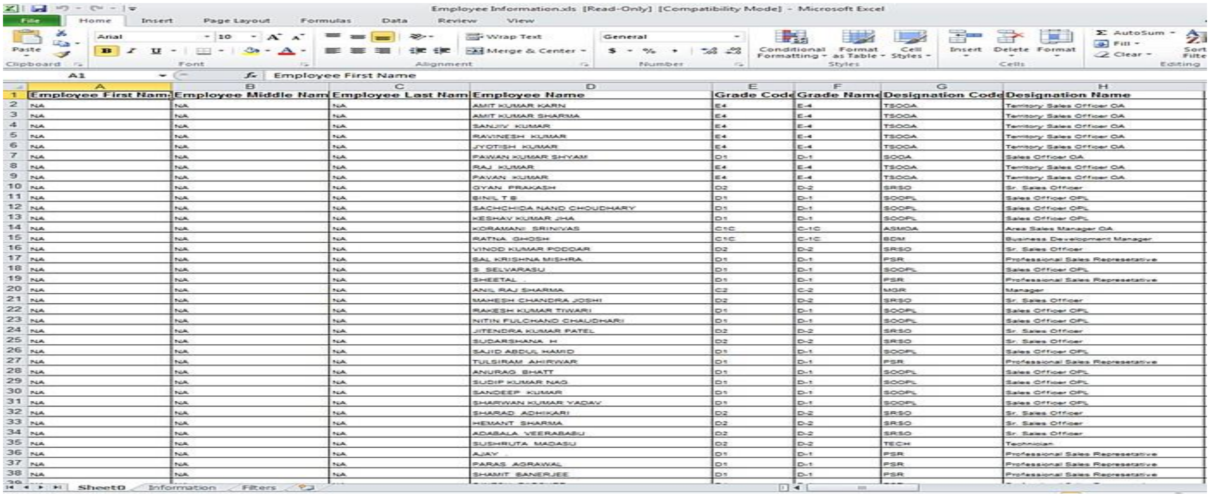

User can enable **Show Filters in Reports** flag to see FIlters used for the report and the other information in the exported Report

c. Select **Text**, to export Raw data in Text format in a delimiter separated file. This enables you to download large volumes of report data in a text file. You can select delimiter separators such as Comma, Pipe and also choose custom character/symbol as a delimiter in the text file.


5. Click **Export**.
6. Follow the on-screen instructions to save the file.

- When a report is exported, the exported PDF or Excel file is saved with the same name as the saved report name.
- If the report has huge data and takes a longer time to run the export query, a time out occurs in the solution and the system displays a 'Time out' message. The solution then generates the report and mails the report link to the logged in user if the user has a valid mail ID.
- You can fetch URL of JSON output of a report when you select Text Export option for a report. JSON option is available only for Text Output Type. When you select JSON option for a Text output type, you can click on **Get URL** button to fetch URL of JSON. The URL obtained after selecting JSON output can be used to download the JSON output.

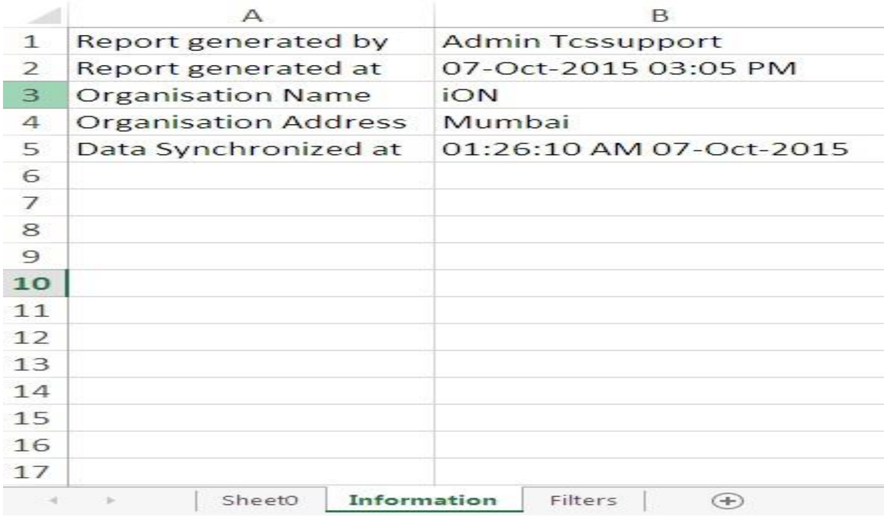
The following image displays an exported report in the excel format:



| | Employee First Nam | Employee Middle Nam | Employee Last Nam | Employee Name | Grade Code | Grade Name | Designation Code | Designation Name |
|---|---|---|---|---|---|---|---|---|
| 2 | NA | NA | NA | AMIT KUMAR KARN | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 3 | NA | NA | NA | AMIT KUMAR SHARMA | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 4 | NA | NA | NA | SANJIV KUMAR | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 5 | NA | NA | NA | RAVINESH KUMAR | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 6 | NA | NA | NA | JYOTISH KUMAR | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 7 | NA | NA | NA | PAWAN KUMAR SHYAM | D1 | D-1 | SOOA | Sales Officer OA |
| 8 | NA | NA | NA | RAJ KUMAR | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 9 | NA | NA | NA | PAVAN KUMAR | E4 | E-4 | TSOOA | Territory Sales Officer OA |
| 10 | NA | NA | NA | GYAN PRAKASH | D2 | D-2 | SRSO | Sr. Sales Officer |
| 11 | NA | NA | NA | BINIL T B | D1 | D-1 | SOOPL | Sales Officer OPL |
| 12 | NA | NA | NA | SACHCHIDA NAND CHOUDHARY | D1 | D-1 | SOOPL | Sales Officer OPL |
| 13 | NA | NA | NA | KESHAV KUMAR JHA | D1 | D-1 | SOOPL | Sales Officer OPL |
| 14 | NA | NA | NA | KORAMANI SRINIVAS | C1C | C-1C | ASMOA | Area Sales Manager OA |
| 15 | NA | NA | NA | RATNA GHOSH | C1C | C-1C | BDM | Business Development Manager |
| 16 | NA | NA | NA | VINOD KUMAR PODDAR | D2 | D-2 | SRSO | Sr. Sales Officer |
| 17 | NA | NA | NA | BAL KRISHNA MISHRA | D1 | D-1 | PSR | Professional Sales Represetative |
| 18 | NA | NA | NA | S SELVARASU | D1 | D-1 | SOOPL | Sales Officer OPL |
| 19 | NA | NA | NA | SHEETAL . | D1 | D-1 | PSR | Professional Sales Represetative |
| 20 | NA | NA | NA | ANIL RAJ SHARMA | C2 | C-2 | MGR | Manager |
| 21 | NA | NA | NA | MAHESH CHANDRA JOSHI | D2 | D-2 | SRSO | Sr. Sales Officer |
| 22 | NA | NA | NA | RAKESH KUMAR TIWARI | D1 | D-1 | SOOPL | Sales Officer OPL |
| 23 | NA | NA | NA | NITIN FULCHAND CHAUDHARI | D1 | D-1 | SOOPL | Sales Officer OPL |
| 24 | NA | NA | NA | JITENDRA KUMAR PATEL | D2 | D-2 | SRSO | Sr. Sales Officer |
| 25 | NA | NA | NA | SUDARSHANA H | D2 | D-2 | SRSO | Sr. Sales Officer |
| 26 | NA | NA | NA | SAJID ABDUL HAMID | D1 | D-1 | SOOPL | Sales Officer OPL |
| 27 | NA | NA | NA | TULSIRAM AHIRWAR | D1 | D-1 | PSR | Professional Sales Represetative |
| 28 | NA | NA | NA | ANURAG BHATT | D1 | D-1 | SOOPL | Sales Officer OPL |
| 29 | NA | NA | NA | SUDIP KUMAR NAG | D1 | D-1 | SOOPL | Sales Officer OPL |
| 30 | NA | NA | NA | SANDEEP KUMAR | D1 | D-1 | SOOPL | Sales Officer OPL |
| 31 | NA | NA | NA | SHARWAN KUMAR YADAV | D1 | D-1 | SOOPL | Sales Officer OPL |
| 32 | NA | NA | NA | SHARAD ADHIKARI | D2 | D-2 | SRSO | Sr. Sales Officer |
| 33 | NA | NA | NA | HEMANT SHARMA | D2 | D-2 | SRSO | Sr. Sales Officer |
| 34 | NA | NA | NA | ADABALA VEERABABU | D2 | D-2 | SRSO | Sr. Sales Officer |
| 35 | NA | NA | NA | SUSHRUTA MADASU | D2 | D-2 | TECH | Technician |
| 36 | NA | NA | NA | AJAY . | D1 | D-1 | PSR | Professional Sales Represetative |
| 37 | NA | NA | NA | PARAS AGRAWAL | D1 | D-1 | PSR | Professional Sales Represetative |
| 38 | NA | NA | NA | SHAMIT BANERJEE | D1 | D-1 | PSR | Professional Sales Represetative |

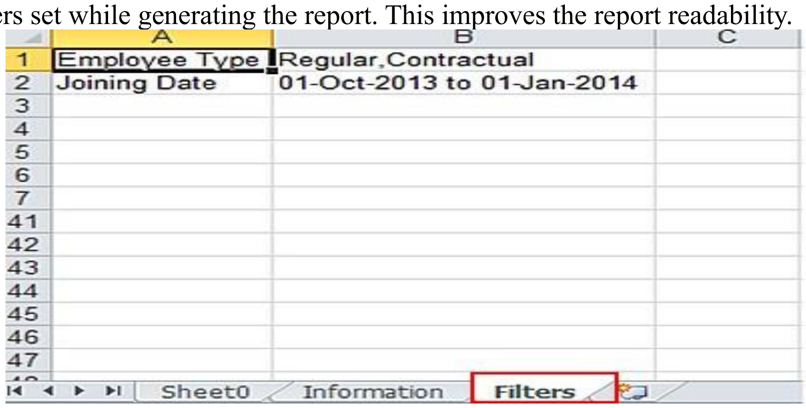
The exported report contains two additional tabs:

- **Information**: This tab includes the report generation details, such as Report generated by, Report generated at, Organization Name and Organization Address. Essential audit information is available in the report for the users.



| | A | B |
|---|---|---|
| 1 | Report generated by | Admin Tcssupport |
| 2 | Report generated at | 07-Oct-2015 03:05 PM |
| 3 | Organisation Name | iON |
| 4 | Organisation Address | Mumbai |
| 5 | Data Synchronized at | 01:26:10 AM 07-Oct-2015 |

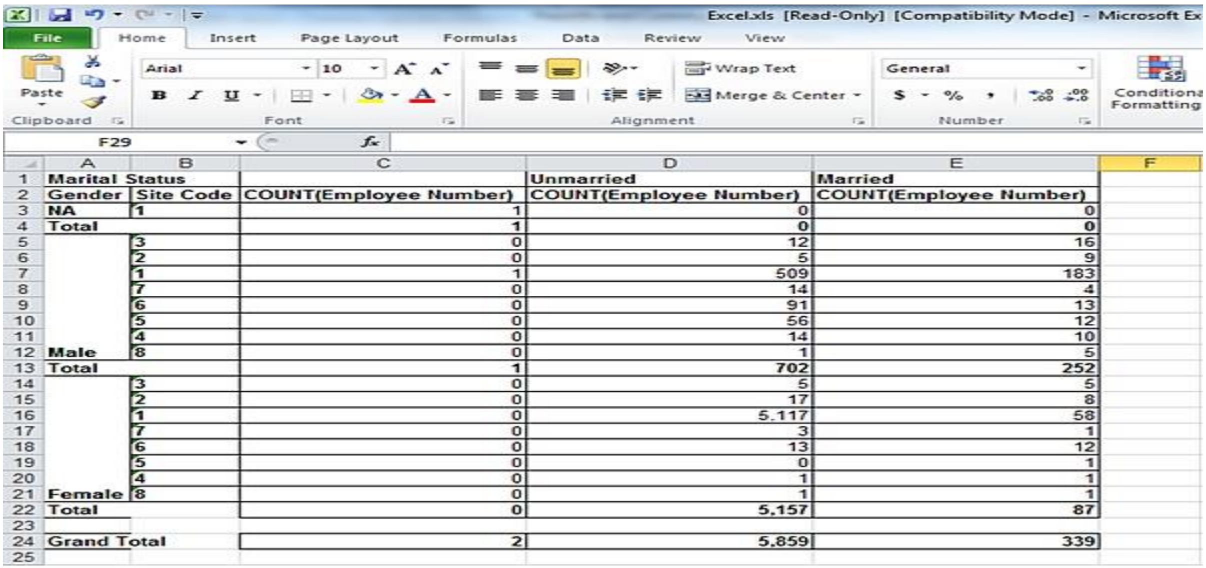
- **Filters**: This tab includes the Filters and filter values used to generate the report. The Filters information is now captured in the excel report, which enables the user to understand the parameters set while generating the report. This improves the report readability.



| | A | B |
|---|---|---|
| 1 | Employee Type | Regular,Contractual |
| 2 | Joining Date | 01-Oct-2013 to 01-Jan-2014 |

These data sheets and information is displayed in the Excel format only.

The following image displays the Pivot data in excel format:



| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Marital Status | | | Unmarried | Married | |
| 2 | Gender | Site Code | COUNT(Employee Number) | COUNT(Employee Number) | COUNT(Employee Number) | |
| 3 | NA | 1 | 1 | 0 | 0 | |
| 4 | Total | | 1 | 0 | 0 | |
| 5 | | 3 | 0 | 12 | 16 | |
| 6 | | 2 | 0 | 5 | 9 | |
| 7 | | 1 | 1 | 509 | 183 | |
| 8 | | 7 | 0 | 14 | 4 | |
| 9 | | 6 | 0 | 91 | 13 | |
| 10 | | 5 | 0 | 56 | 12 | |
| 11 | | 4 | 0 | 14 | 10 | |
| 12 | Male | 8 | 0 | 1 | 5 | |
| 13 | Total | | 1 | 702 | 252 | |
| 14 | | 3 | 0 | 5 | 5 | |
| 15 | | 2 | 0 | 17 | 8 | |
| 16 | | 1 | 0 | 5,117 | 58 | |
| 17 | | 7 | 0 | 3 | 1 | |
| 18 | | 6 | 0 | 13 | 12 | |
| 19 | | 5 | 0 | 0 | 1 | |
| 20 | | 4 | 0 | 1 | 1 | |
| 21 | Female | 8 | 0 | 1 | 1 | |
| 22 | Total | | 0 | 5,157 | 87 | |
| 23 | | | | | | |
| 24 | Grand Total | | 2 | 5,859 | 339 | |
| 25 | | | | | | |

You can also perform the following actions in the **Choose Format/Template to export data** dialog box:

- Set as Preferred Template
- Mail
- Save on Cloud Drive
- Get URL

**Set as Preferred Template**

Use the Set as Preferred Template option to set the default export template for a report.

If you set a preferred template for a report, the next time you try to export the report, the system displays a message box to confirm whether you want to export the report in the preferred template.

In the **Choose Format/Template to export data** dialog box, you can set any template, such as Header or Footer Template, Pivot Data Template, Raw Data Template, HTML or Offline template as a default template. It could either be the Excel or the PDF template.

The selected template is marked with an asterisk (*) to denote that the template is set as the preferred template to export the report. To update/or change the default template for a report, click **Update as Preferred Template**.

**Mail**

Click this option to generate the report and mail it to the logged in user. The report is generated as per the selected template.

**Save on Cloud Drive**

Click this option to generate the report and save it on the iON Cloud Drive. For more information on iON Cloud Drive, see Cloud Drive.

**Get URL**

The Get URL option can be used download reports using web services for external applications. For more information refer to the help provided in the Export report dialog box.

**Admin level permission for export Reports**

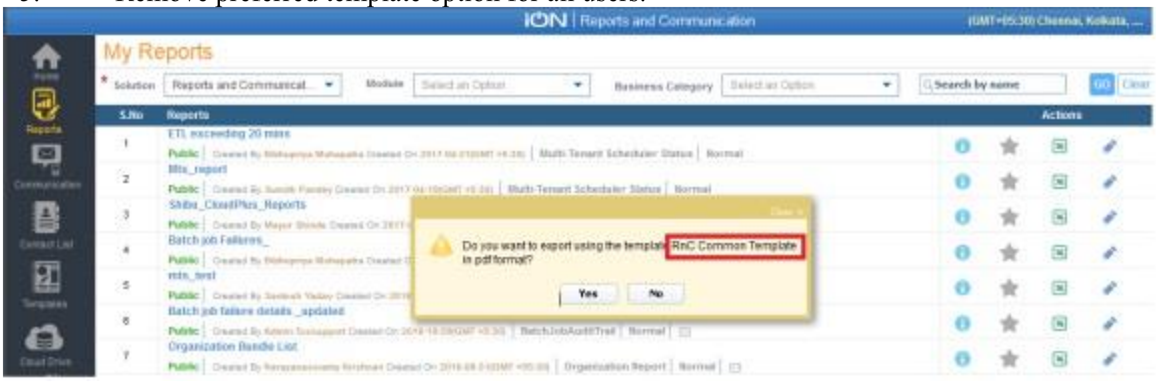
Admin level permission enables to export a report in the preferred template format. Admin users can set the report to export in preferred template format.

To export reports for admin level permission:

1. Go to **My Reports** >> **Search reports**
2. Click **Export icon**. The export popup displays.
3. Set the export format as default export.

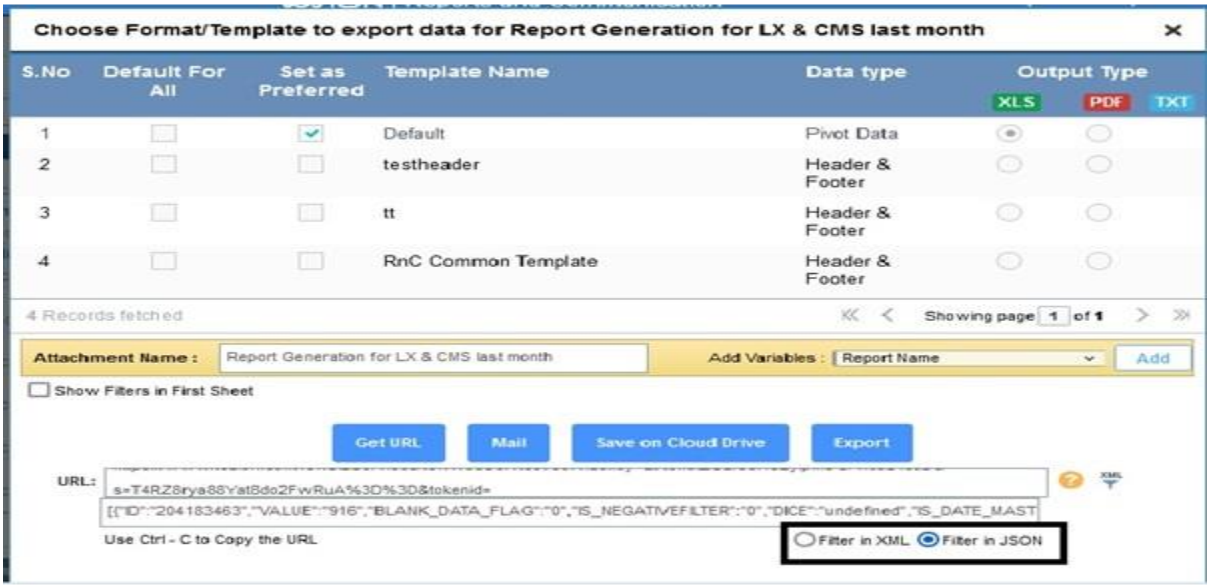

4. Export the report from admin/non-admin user logins.


5. Remove preferred template option for all users.




6. Search for Report and click on **Expert Report.**
7. Select required output type and **Click on Get URL** option.
8. Two options are added:

- Filter in XML
- Filter in JSON




9. Search for report and click on **Export**.
10. Select Excel as Output type. Then **Show Filters in First Sheet options** is visible that enables to view filters in the first sheet of the extracted report.


# Edit Report Definition

The **Edit Report Definition** action enables you to edit the report.
When you perform the **Edit Report Definition** action, you are re-directed to the Design Reports screen. You can update the report filters and columns as required and generate or save the report accordingly.

 While saving the report, you can use the Save As New Report check box to create a new report.

To edit the report:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to edit.
3. In the **Actions** column, click the **Edit Report Definition**  icon.

The report filters and column details are displayed in the Design Reports screen.

4. Update the filters and columns as required.
5. Do one of the following:
   a. Click **Generate Report** and in the subsequent screen save the report.
   b. Click **Save Report**.

For detailed information on how to design a report, see Design Reports screen.

# Delete Report

The **Delete Report** action enables you to delete a report from the solution.
To delete a report:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to delete.
3. In the **Actions** column, click the **Delete** icon.

The following message box is displayed:


4. Do one of the following:
   a. Click **Yes** to delete the report.
   b. Click **No** to exit the message box.

# Add To Quicklinks

This action enables you to add the report to Quicklinks in the ***iON Self-Service*** solution. You can add all types of reports, that is, Public, Private and Limited type of reports to iON Self Service. This enables you quick access to reports that are created by you and also other users in the organisation.
To add a report as a quicklink:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to add to Quicklinks.
3. In the **Actions** column, click the **More Actions** list.
4. Click **ADD to Quicklinks**.

The report is added as a Quicklink in the ***iON Self-Service*** solution. To view the report, access the ***iON Self-Service*** solution.

To remove the report from Quicklinks:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to remove from Quicklinks.
3. In the **Actions** column for the report click **More Actions**.
4. Click **Remove from Quicklinks**.

# Add to Rule List

You can select a Normal report from My Reports screen and add it to Rule List. This option is available for Normal reports, which are marked applicable to be added as rule.
To add a normal report to rule list:

1. Go to **Reports** >> **My Reports**.
2. Specify **Solution**, **Business Category** and click **GO**.
3. Identify the report you want to add to Rule list and in the More Actions list, select **Add to Rule List**. The report is added to rule list.

If the normal report is not applicable to be copied as rule, or if it is pivot report, an error message is displayed.

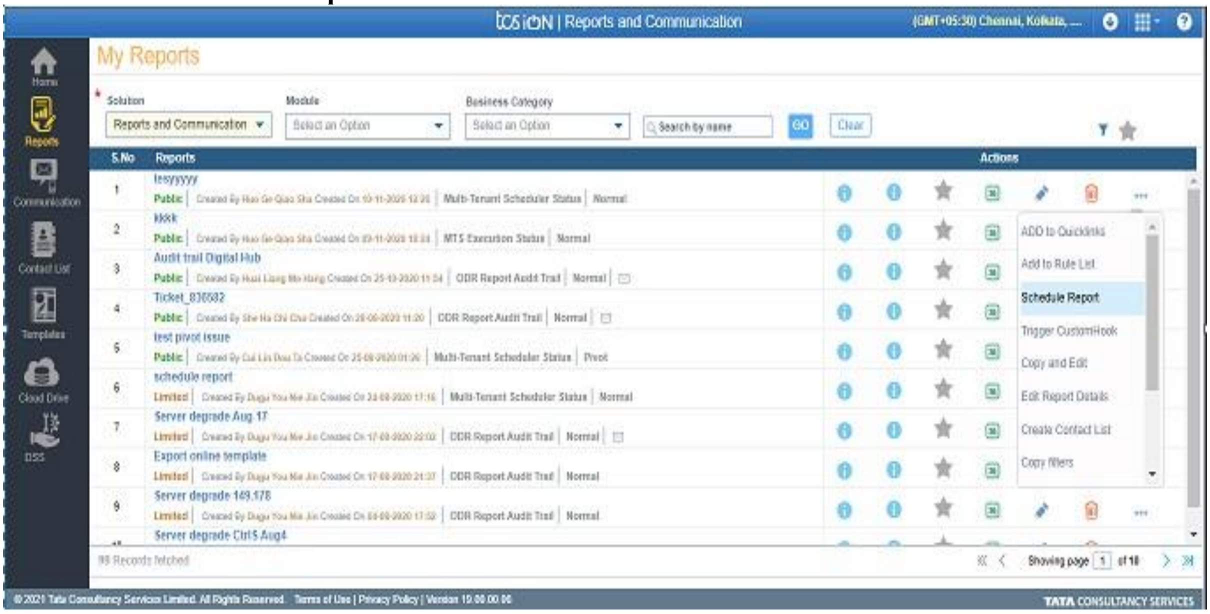
# Schedule a Report

This action enables you to schedule report generation in the solution. You can specify details, such as the date, time, report template, recipients using the various fields in the **Schedule a Report** dialog box.
You can specify the following details in the Schedule a Report dialog box:

- Define whether the reports is scheduled for bulk employees that are part of a user group or if the report is scheduled for yourself.
- Define whether the report is generated daily, weekly or define a date and time for report generation.
- Select User Timezone or a Fixed Timezone option. Select **Fixed Timezone** option to select a different time zone for scheduling the report according to that time zone.
- Schedule 'Raw Data', that is, the detailed report or the 'Pivot Data', in case the generated report contains pivot data.
- Select the file type (PDF/Excel) for a scheduled report.
- Specify templates while scheduling a report. This enables you to schedule reports more than once by selecting different Templates/File Types.

To schedule a report:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to schedule.
3. In the **Actions** column, click the **More Actions** list.
4. Click **Schedule a report**.




The **Schedule Report** dialog box appears:


5. Select the **Delivery Frequency**:Based on the selected frequency, certain fields might be disabled. For example, if you set the delivery frequency as One Time, the End Date and Delivery Day fields are disabled.
   - **One Time**: Report is generated on the specified date and time.
   - **Daily**: Report is generated daily until the specified end date.
   - **Weekly**: Report is generated weekly for all the selected days.
   - **Monthly**: Report is generated once a month on the specified day.

6. Specify the **Start Date**, **End Date**, **Delivery Time** and **Delivery Day** as applicable to the schedule.

7. Select Timezone Pref as User Timezone or Fixed Timezone.

   o For a Fixed Timezone, select a Timezone from Select Timezone dropdown.

8. In the **Template** list, you can select the templates that are available for the report. When the schedule is saved, the report is generated in the selected template and sent to the recipient. The following image in an example of various templates that are saved for a report and displayed in the **Template** list:


9. Select the **File Type** or file format in which the report will be generated. You can select Excel, PDF, Text or Zip file formats.

   o If you select PDF, you need to specify the Page Size, Page Orientation, Font and Font Size for the PDF.
   If you wish to add a font to the solution, you must contact the *iON Reports and Communication* solution team to configure the same. You can also add fonts of different languages, which enables you to generate the report as per the desired language.

   o If you select Text file format for Raw data scheduling, you can specify the delimiter for the Text file.

10. Select the **Schedule Type**.
This option defines whether the report is schedule for individual user (Self) or a user group in the organisation. The options are:

   o **Schedule for Self**: Schedule the report for yourself.

   o **Bulk Schedule**: Schedule the report for a user group in the organization. If this option is selected, the **User Groups** drop down list is displayed. You must select a user group listed in the **User Groups** list to schedule the report.

   o **Custom Hook**: Schedule to trigger custom hooks for various iON solutions.
   Hook List dropdown appears. The dropdown lists the custom hook provisioned for the business category of selected report. Select a custom hook. The parameters corresponding to hook appear, if any input is required for the custom hook. Specify the input value in parameters. These values will be input values to the custom hook during execution.

11. Based on the selected **Schedule Type**, select the **Generation Type**.
The options are as follows:

The User Groups list is displayed if the Bulk Schedule type is selected as the Schedule Type. This list contains all the user groups in the organization. Based on the Generation Type selected, the email notification with the report link will be sent to the user part of the user group.

   o **Generate & Mail**: Select this option to generate the report in the Reports and Communication solution and mail the report link to the end user. This option is available for both types of schedule, that is, **Schedule for Self** and **Bulk Schedule**.

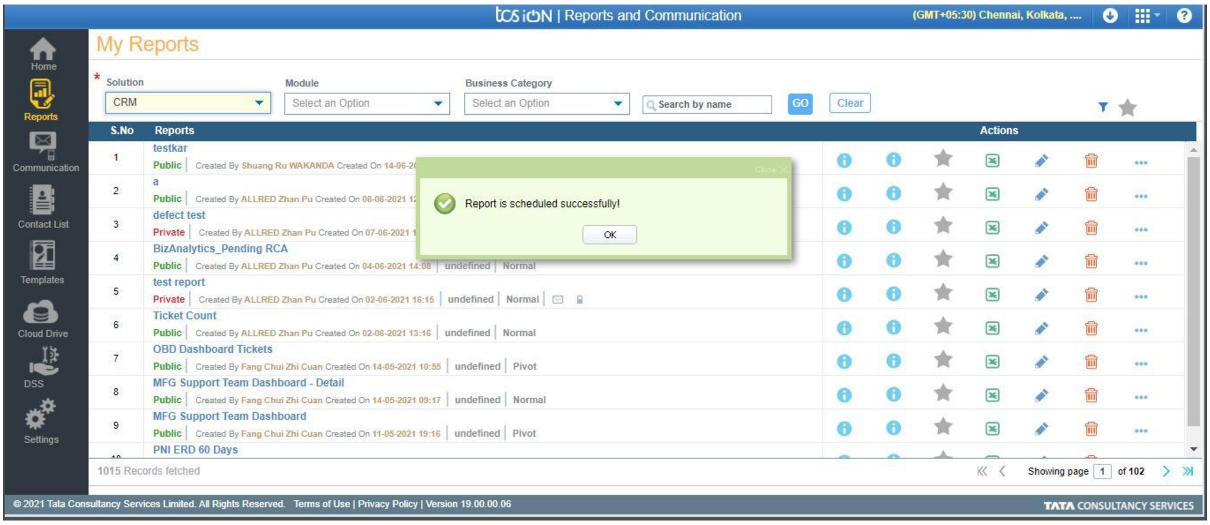
   o **Save on Cloud Drive**: Select this option to generate the report and save it on the Cloud Drive for future use. This option is available when **Schedule for Self** is selected as the **Schedule Type**.
   ***Note***: *For more information on iON Cloud Drive, see* ***Cloud Drive***.

   o **Mail Link**: Select this option to mail the report link to the employees that are part of the selected user group in the **User Groups** list. When the users click the report link, the report is generated and displayed to the users.

12. Select *Yes* in **Notify Blank** to send email notification when blank report is generated. This will send a notification mail instead of blank file, when the scheduled report communication generates a blank report.

13. Specify the **Attachment Name** field to specify a unique name for the report when the report is scheduled.
You can use the **Add Variables** field to use variables in the Attachment Name to create a dynamic report name.

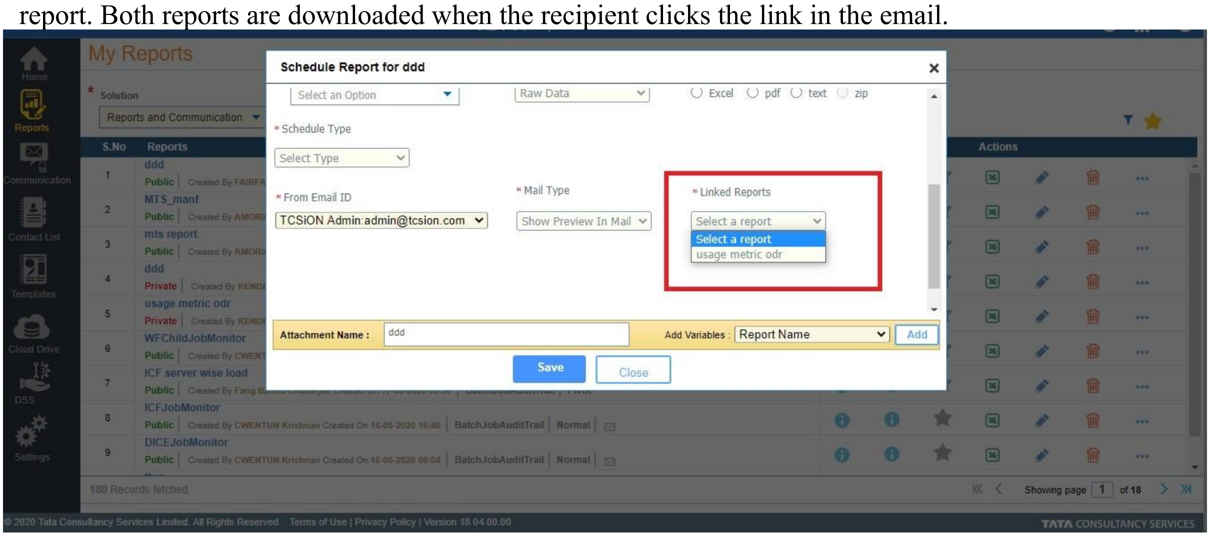
14. Click **Save** to save the schedule.



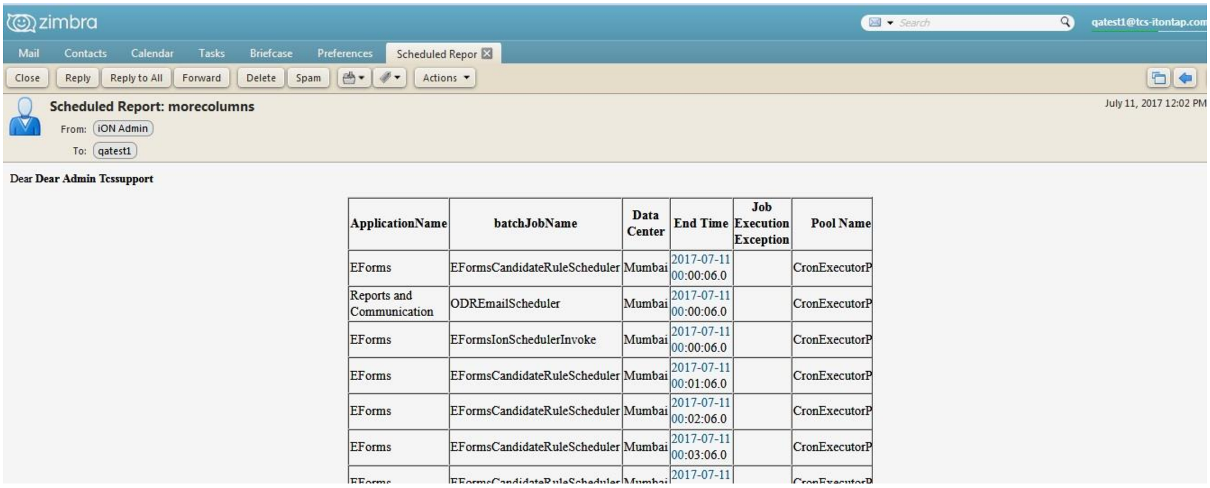

When email is to be triggered for scheduled reports, and if there is error in report generation, an email of the report generation failure is sent to end users so that they can check the report and schedule it properly.

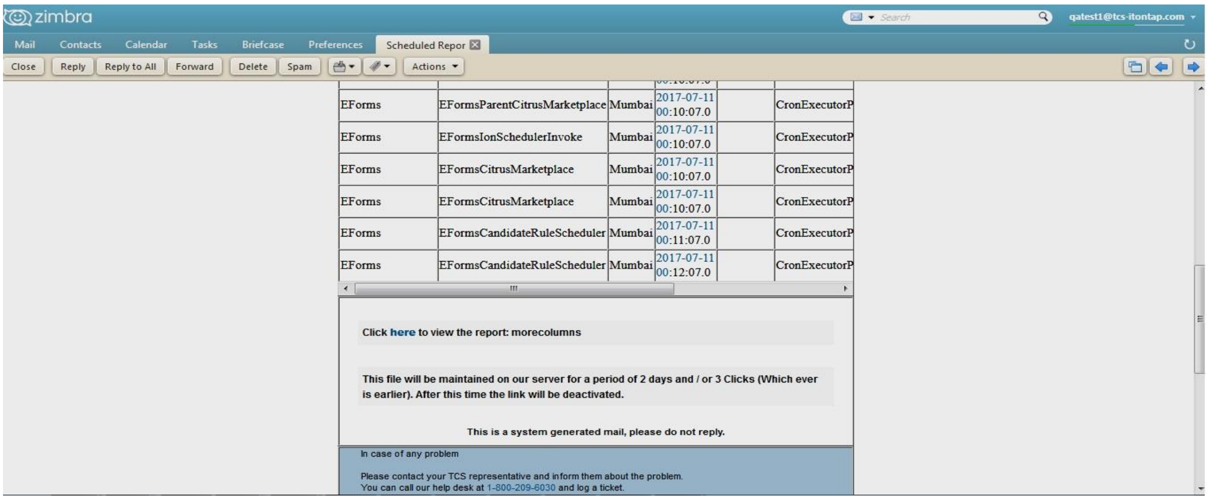
1. Go to **reports** >> **My Reports**
2. Select any report and schedule with mail format type as **"Show preview in mail"**.

**Note**: While scheduling Pivot reports, when you select Show Preview in Mail, the Linked Report menu appears and displays the list of reports that are linked to the pivot report. For information about linking reports, see Link Report. You can design two reports: brief report and detailed report. The Show Preview in Mail drop down enables you to select the report you want to send as preview in the email. Select the brief report to show as preview in the email and link the detailed report. Both reports are downloaded when the recipient clicks the link in the email.




3. Check the e-mail. Data displays in email.

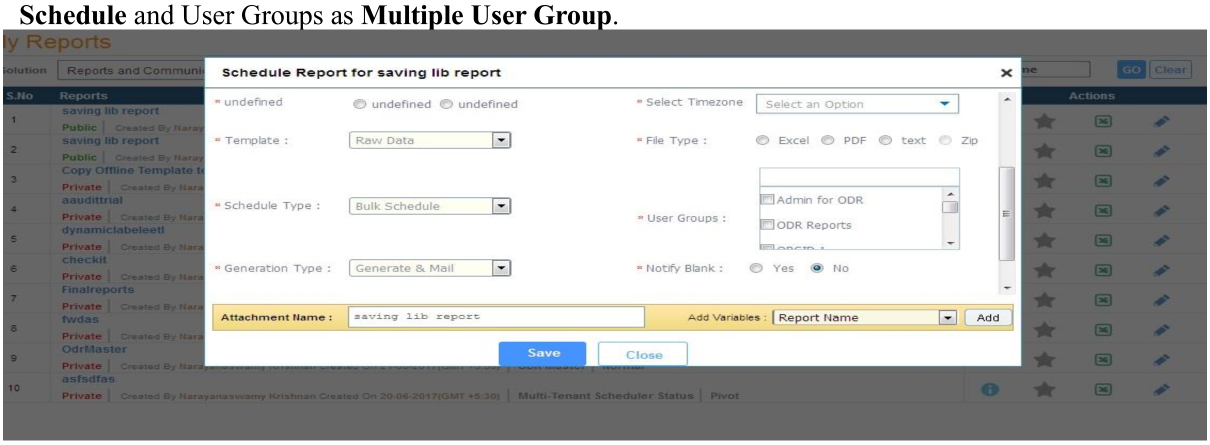



## MULTI-select option in select user group in schedule reports

To use this option:

1. Go to **Reports** >> **My Reports**.
2. Select **Solution** from the dropdown.
3. Click **Go**.
4. Navigate to **My Reports Actions** >> **Schedule a Report**. The **Schedule** screen displays. Specify the field details. Fields marked * are mandatory. Select Schedule type as **Bulk Schedule** and User Groups as **Multiple User Group**.




5. Click **Save**. The e-mail triggers to all users union of all user group's data.

To unschedule or update a report schedule:

1. Perform the step by step procedure in the **To search reports** section.

2. Identify the report you want to update.
3. In the **Actions** column for the report click **Choose**.
4. Click **Schedule a Report**.

The **Schedule Report** dialog box is displayed.


5. Select the required template for the report.
6. Do one of the following:
   a. Click **Schedule New** to create a new schedule for the report.
   b. Click **Update** to update the schedule settings for the selected template.
   c. Click **Unschedule** the unschedule the report.
   d. Click **Close** to close the display box and to return to the search results.

# Copy and Edit

This action enables you to create a new report using the existing report as a template. When you perform the **Copy to New** action, you are re-directed to the Design Reports screen. You can update the filters and columns in the report and generate or save the report accordingly.
You can also copy the existing report templates to the new saved report. This reduces the effort of creating new templates for the report and increases reusability of the existing templates.

You can copy templates to a new reports, only if the existing report is tagged to templates.

To use copy to new action:

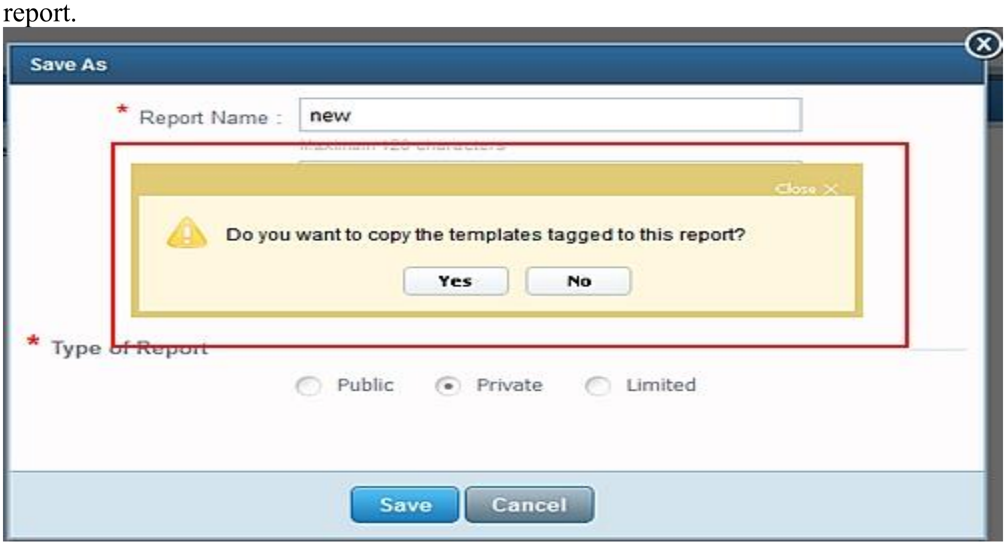
1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to use as a template.
3. In the **Actions** column, click the **More Actions** list.
4. Click **Copy to new**.

The report filter and columns details are displayed in the **Design Reports** screen.

5. Update the filters and columns as required.
6. Do one of the following:
   a. Click **Generate Report** and in the subsequent screen save the report.
   b. Click **Save Report**.

   The **Save Report** dialog box is displayed:
      i. Enter the required details.
      ii. Click **Save**

      The confirmation box is displayed to copy the existing templates to the new report.




7. Click **Yes** to save the templates to the new report.

For detailed information on how to design a report, see Design Reports screen.

# Edit Report Details

The **Edit Report Details** action enables you to edit the report details.

When you perform the Edit Report Details action, the **Save As** dialog box is displayed. You can update the Report Name, Report Description and the Type of Report.

To edit the report details:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to edit.
3. In the **Actions** column, click the **More Actions** list.
4. Click **Edit Report Details**.

The **Save As** dialog box is displayed.


5. Update the **Report Name**, **Report Description** and **Type of Report**.
6. Click **Save**.

The report is saved in **My Reports** with the updated details.

# Create Contact List

The **Create Contact List** action enables you to create a dynamic contact list for the report. This contact list is used for bulk communication using either the Email or/and SMS.
For detailed information on dynamic contact list, see Contact List.
**Prerequisite:** In order to create a contact list for a report, the report must contain Email ID or Mobile number as a display column.
To create a contact list:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to edit.
3. In the **More Actions** column, click the **More Actions** list.
4. Click **Create Contact List**.

A dynamic contact list is created in My Lists.

# Link Report

In iON Reports and Communication, you can create Normal reports and Pivot reports separately in the Design Reports screen. The **Link Report** feature enables you to link a Pivot report to any Normal report created for the ***same Business Category*** in the solution.
You can also link pivot reports to other pivot reports. Thus, you can create a chain of pivot reports where last pivot report in chain should link to a Normal report.

*This **Link Report** option is not available for normal reports saved in My Reports screen.*

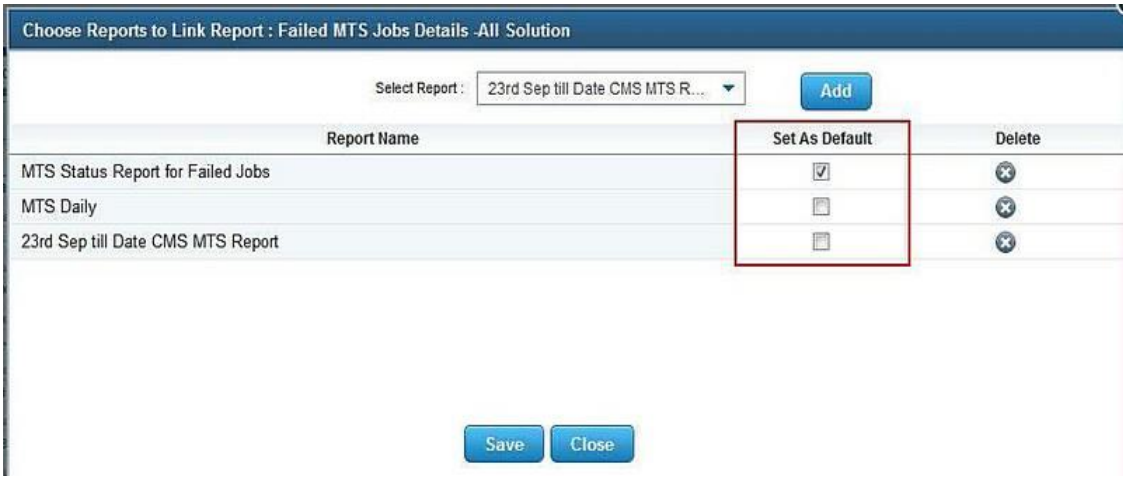
The Pivot report can be linked to multiple normal reports created for the same Business Category. After linking, the pivot can be used to drill down to data from different reports using the same pivot. When the report is generated, the pivot report is displayed. When you try to drill down on a value, the Normal reports tagged to the Pivot are displayed. You can select the report in which you want to drill down and view the report data.

The Filters of the normal reports are not considered while drilling down. Only pivot filters are considered.

To create link a pivot report:

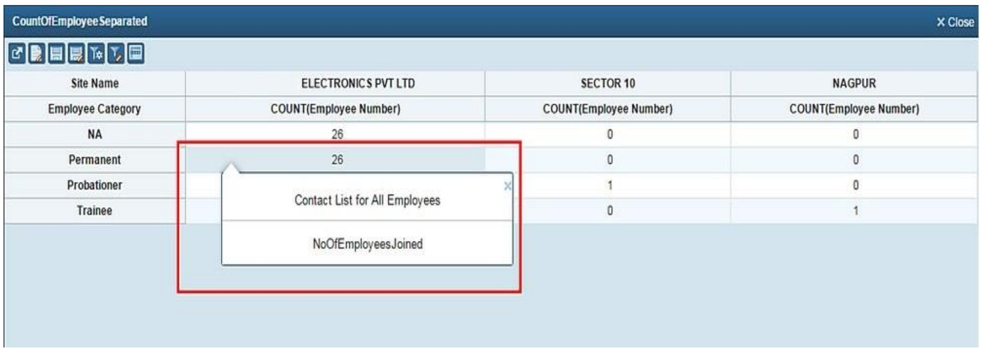
1. Perform the step by step procedure in the **To search reports** section.
2. Identify the Pivot report you want to link to normal reports and in the **More Actions** list, select **Link Report**.
   The **Link Report** dialog box is displayed.
3. In the **Select Reports** list, select a normal or pivot report and click **Add**.
   Perform the same action to add multiple reports as required.

4. Identify the report you want to set as a default report and select the appropriate check box.




5. Click **Save** to link the reports.
6. In **My Reports** screen, click on the Pivot Report name to generate the report.

The Pivot report is displayed in the screen.

7. Do one of the following:
    a. Double click on a report value, row header or column header to drill down on the value. The report will automatically drill down to the set default report.
    b. In case, a default report is not set for the link report, click on the report value to drill down on the value.
    The reports that are linked to the Pivot report are displayed. Identify the report you want to drill down to and click the report name.
    c. Click on the ***i*** icon to view dimesions of the drill down report.
    d. If there is a chain of pivot reports linked to report, again click on a metric to generate drill down report. Upon further drill down of linked pivot report, select normal report/pivot report. Similarly, you can generate drill down reports until you view normal report.
    e. 


# Add To Widgets

The **Add to Widgets** action is applicable for both Normal and Pivot Reports.

You can add reports as widgets in the iON Self Service solution. This enables you to provide the reports to the employee in their Self Service screen. The employees can then generate the reports directly from the Self Service gallery.

It is important to note that, the report in iON Self Service will be visible based on the Confidentiality Type of the report that is:

- If the report is a Public report, the report will be available in the Self Service public gallery for all employees.
- If the report is a Private report, the report will be available in the Self Service gallery of the employee who has created the report.

- If the report is a Limited report, the report will be available in the Self Service gallery of all the employees belonging to the selected user group.

To add a report as a quicklink:

1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to add to Widgets in iON Self Service.
3. In the **Actions** column, click the **More Actions** list.
4. Click **Add to Widgets**.

The report is added as a widget in the ***iON Self-Service*** solution. To view the report, access the ***iON Self-Service*** solution.

After the report is added as a widget, this action is replaced with the **Remove from Widgets** actions, which enables you to remove the report from the iON Self Service gallery.
To remove the report from Widgets:

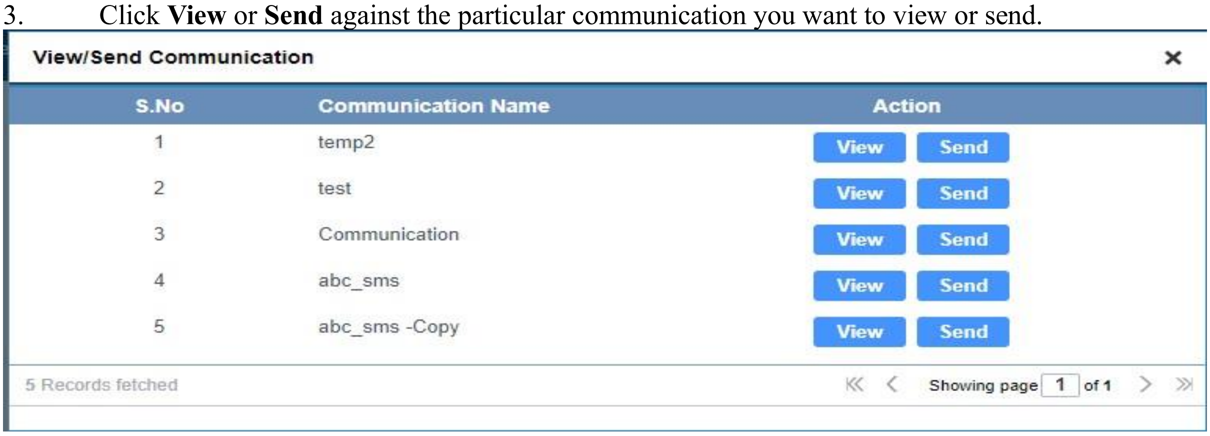
1. Perform the step by step procedure in the **To search reports** section.
2. Identify the report you want to remove from Widgets.
3. In the **Actions** column for the report click **More Actions**.
4. Click **Remove from Widgets**.

# Viewing and Sending Communication Saved for the Report

Dynamic contact report is used for sending communications in bulk with its contact details. The **Send Communication** option enables you to view and send communication created for the report.
To view and send communication:

1. In the **My Reports** tab, click on the dynamic contact report.
The report screen appears.

2. On the report screen, on the tool bar, click the Send Communication icon  .
The **View/Send Communication** window appears, listing all the created communications.
3. Click **View** or **Send** against the particular communication you want to view or send.



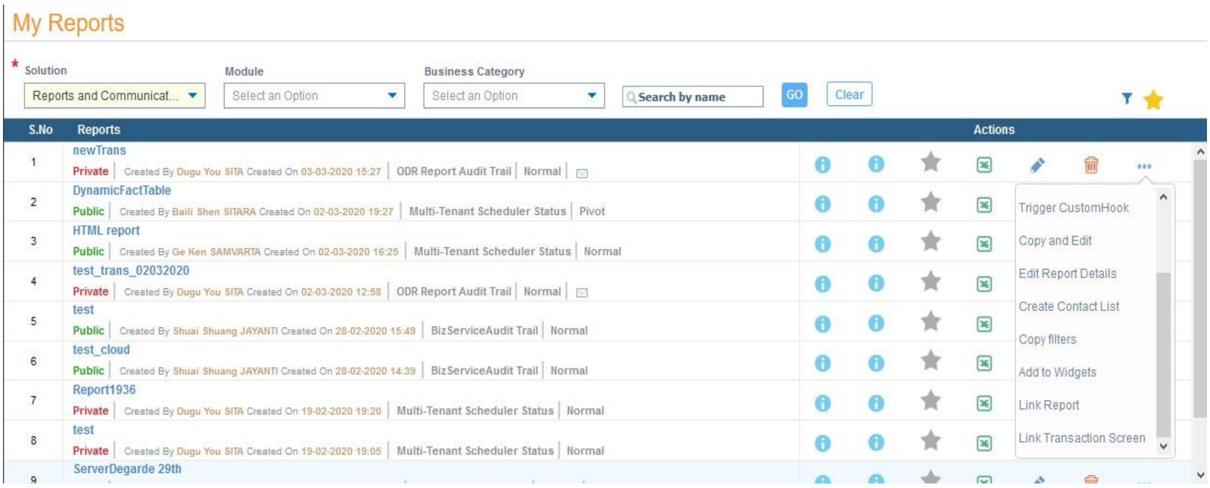

4. You can view the status of your sent communication in the **Communication** > **My Communications** screen.

# Link Transaction Screen

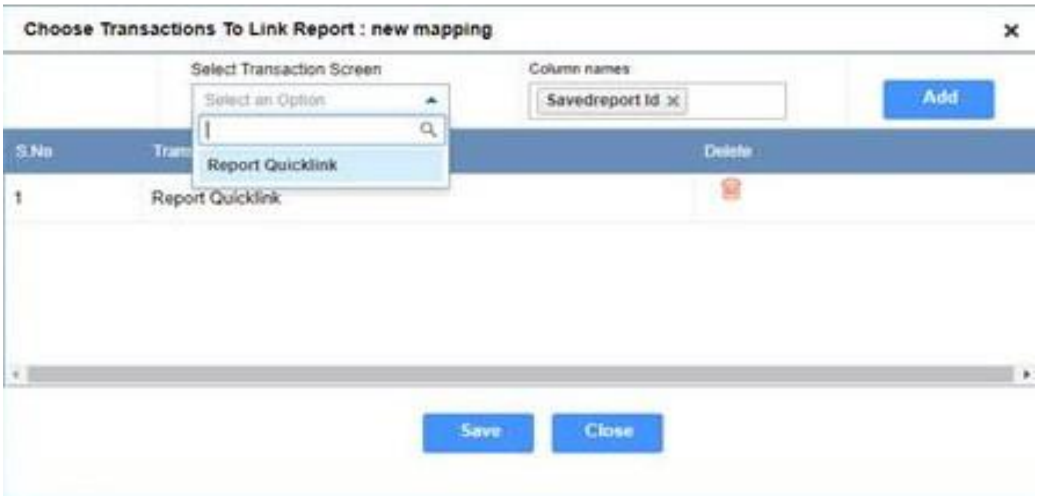
The Link Transaction Screen feature enables you to link a transaction screen to any normal report created in the solution. The transaction screen from a solution can be linked to particular column in the generated report. You can view the transaction screen by clicking the view transaction screen icon on the particular column in the generated report.
To link a transaction screen:

1. Perform the step by step procedure in the To search reports section.

2. Identify the report you want to link to transation screen and in the More Actions list, select **Link Transaction Screen**.



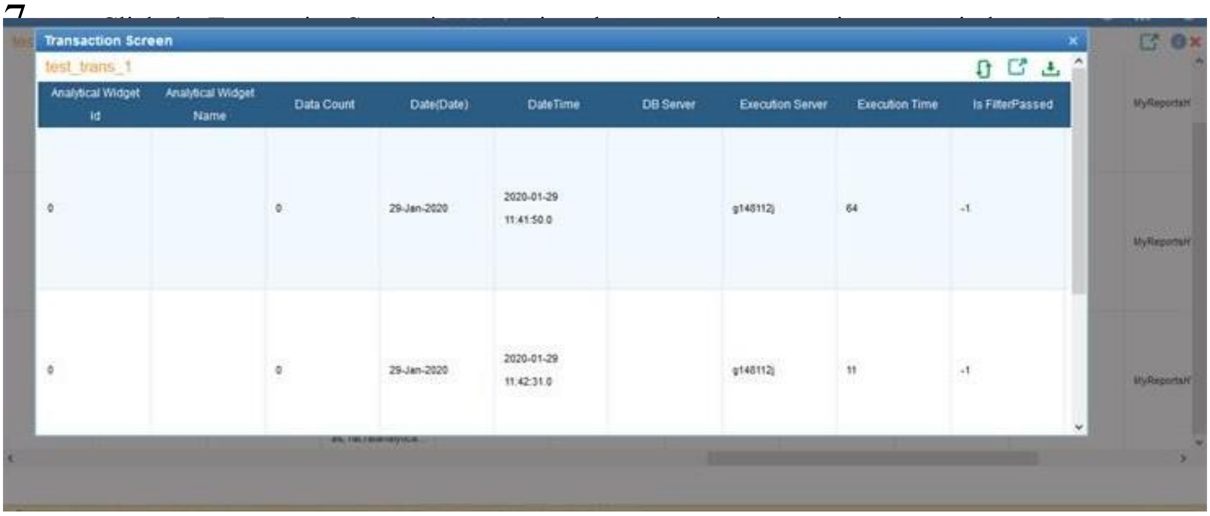

3. The **Choose Transaction To Link Report** window appears.
4. Select the Transaction Screen from the **Select Transaction Screen** drop down and select and add the column names from the list into the **Column names** field. Click **Add**.
5. The Transaction Screen name is listed below.




6. Click **Save** to link transaction screen with the report.

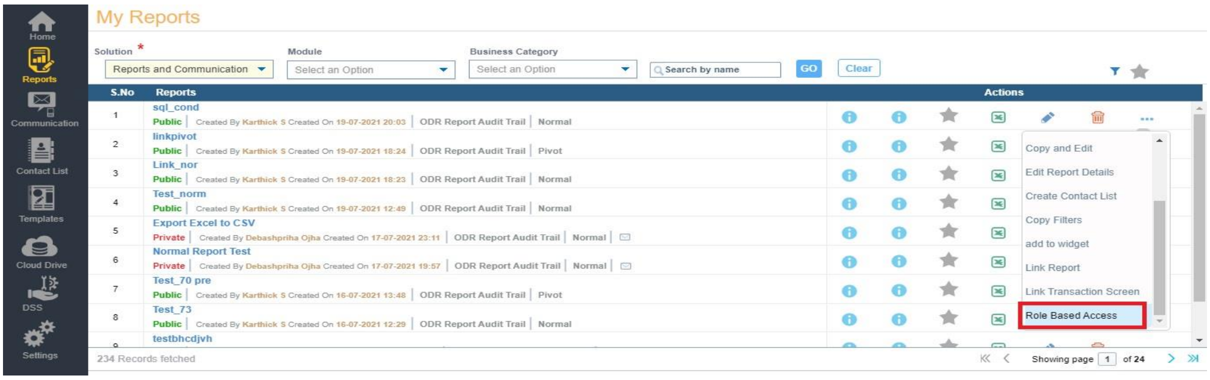
The generated report displays transaction screen icons on the selected column, which links to the transaction screen.


| Analytical Widget Id | Date(Date) | DB Server | Organization Id | Organization Name | Savedreport Id |
|---|---|---|---|---|---|
| 0 | 02-Mar-2020 | | 13 | TCS iON | 46923 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 24818 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 46923 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 33235 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 17634 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 35722 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 25696 |
| 0 | 02-Mar-2020 | | 13 | TCS iON | 33185 |

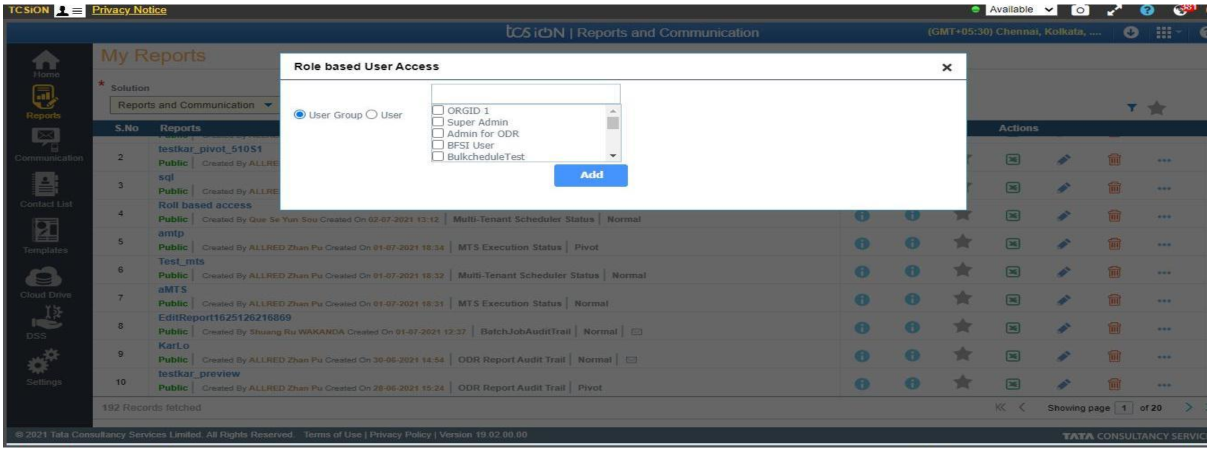



# Role based access

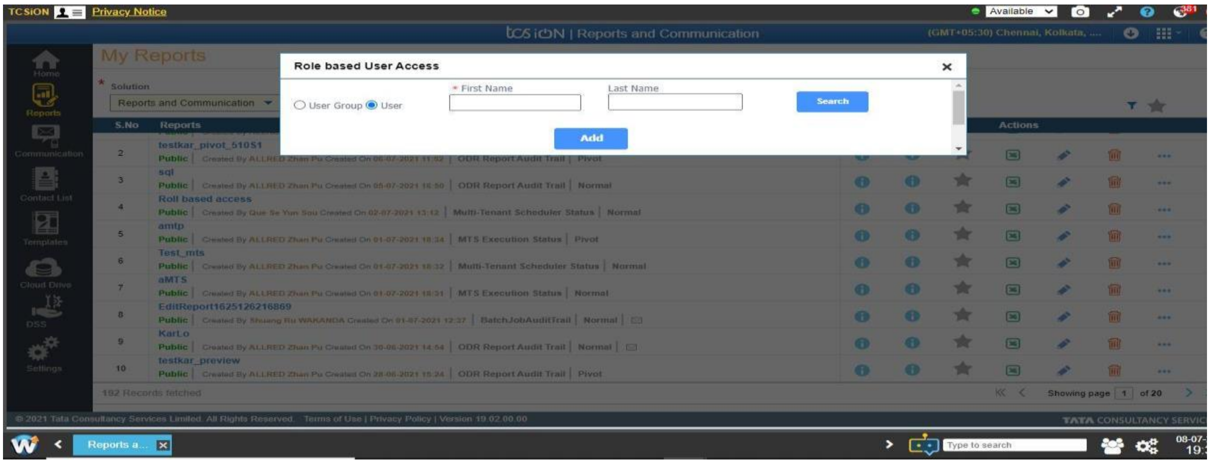
1. Go to **Reports** >> **My Reports** >> after selecting solution click on **Go** >> **More Action on any Report** >> **Role Based Access.**



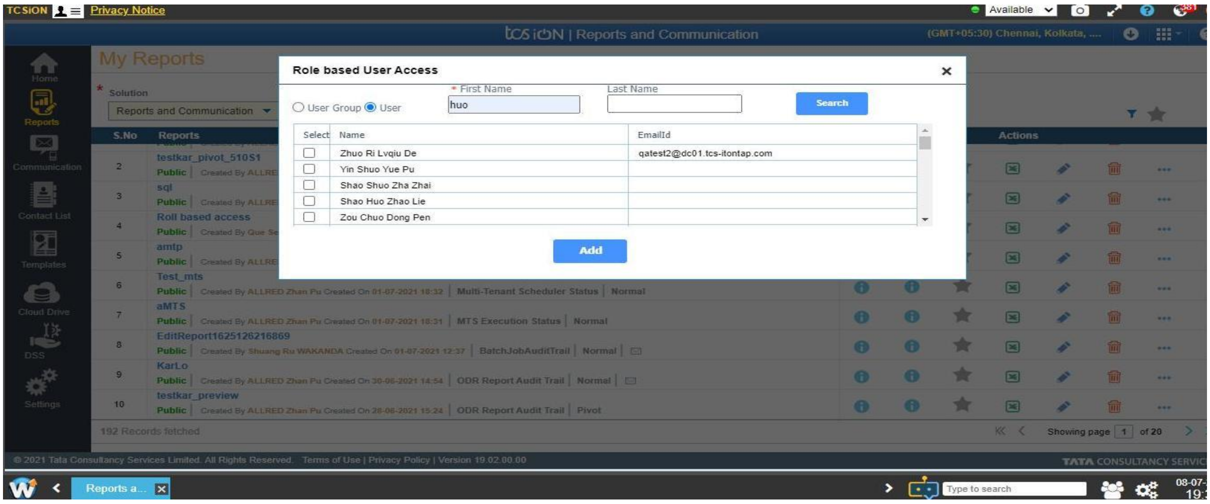

2. Select **User Group** for access to more than one user.



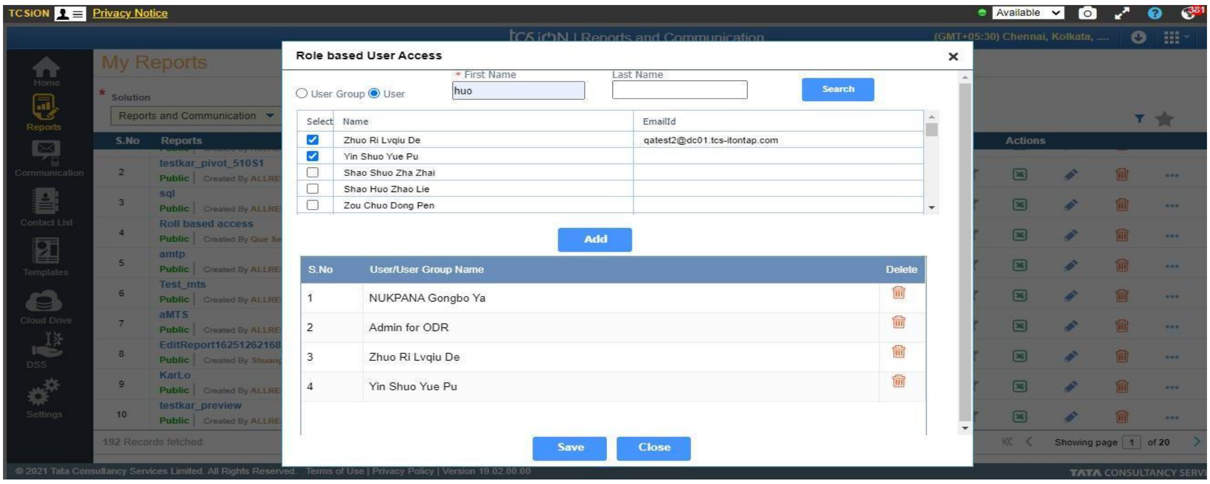

or Select **User,** enter th**e First and Last Name** of the User. Click **Search.**



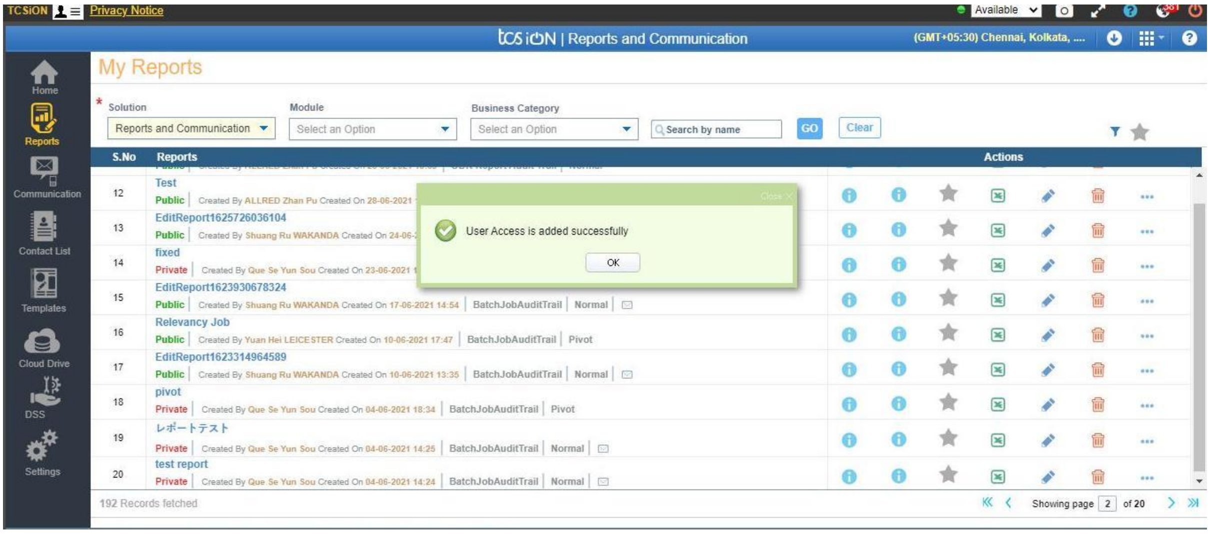

**3.** User list based on the first and last name appears as following.




4. Click **Add to** add user and click **Save** to save user details or **Close.**

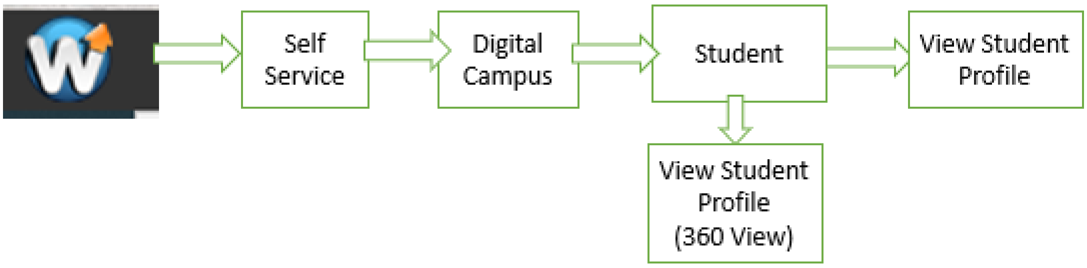



5. After **User/User Groups** are successfully added and saved the following screen appears:

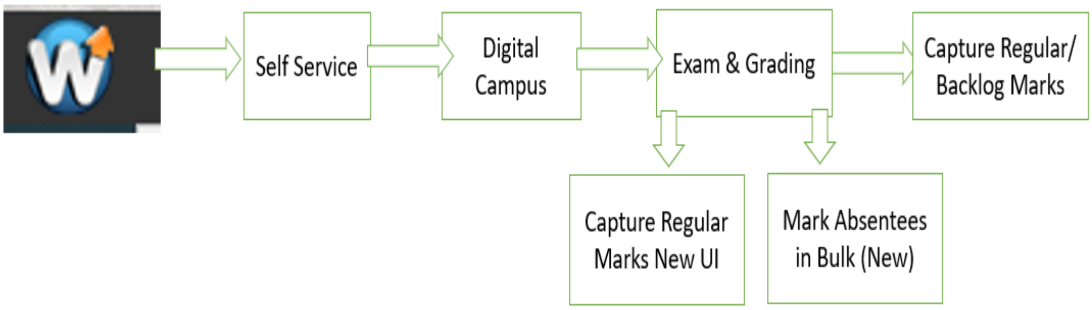



# Self Service

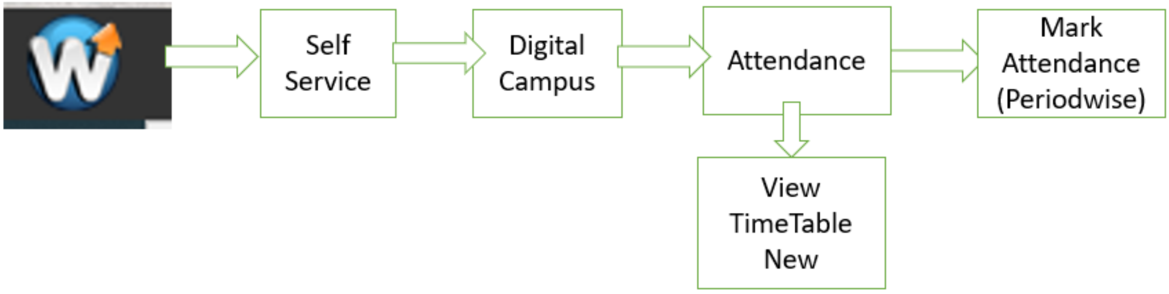
# Digital Learning

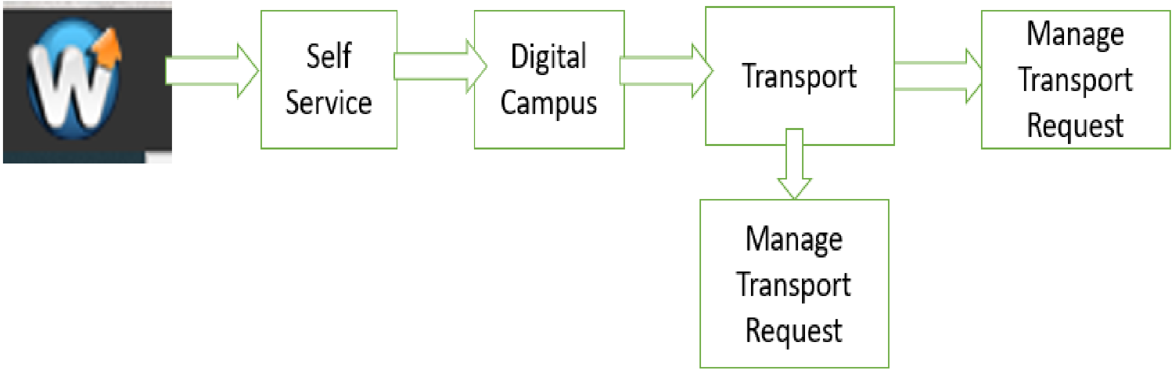

# Exam & Grading



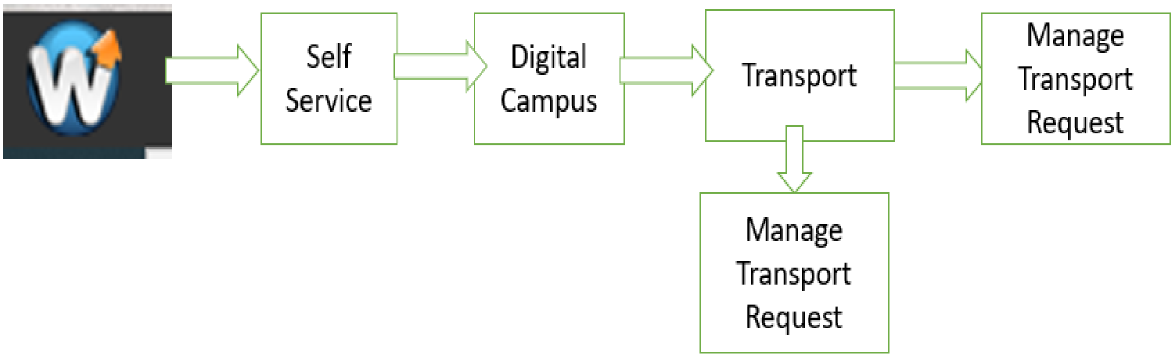

# Attendance




## Transport



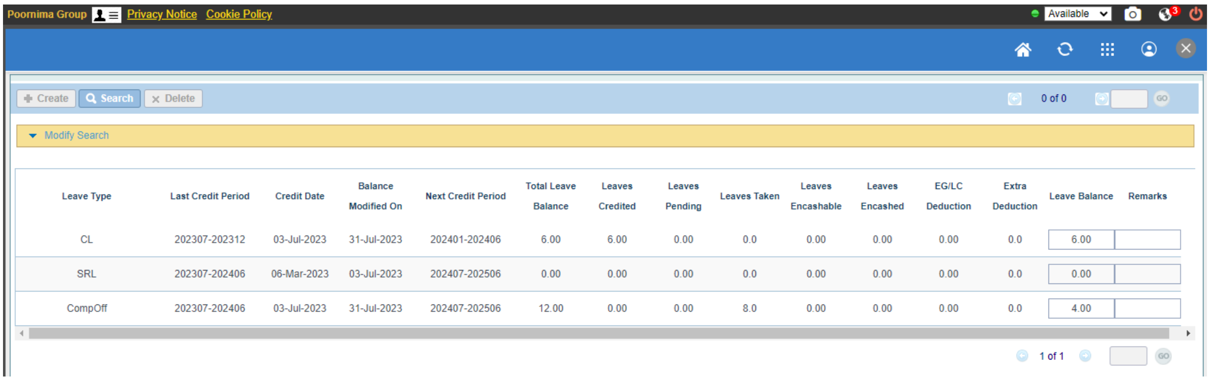

## Feedback



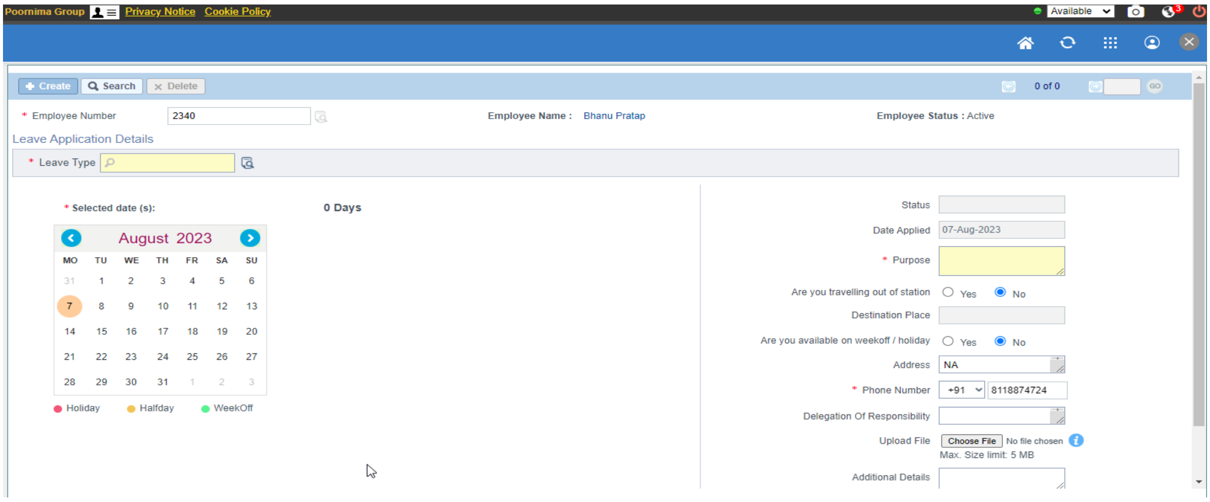
# Employee Management

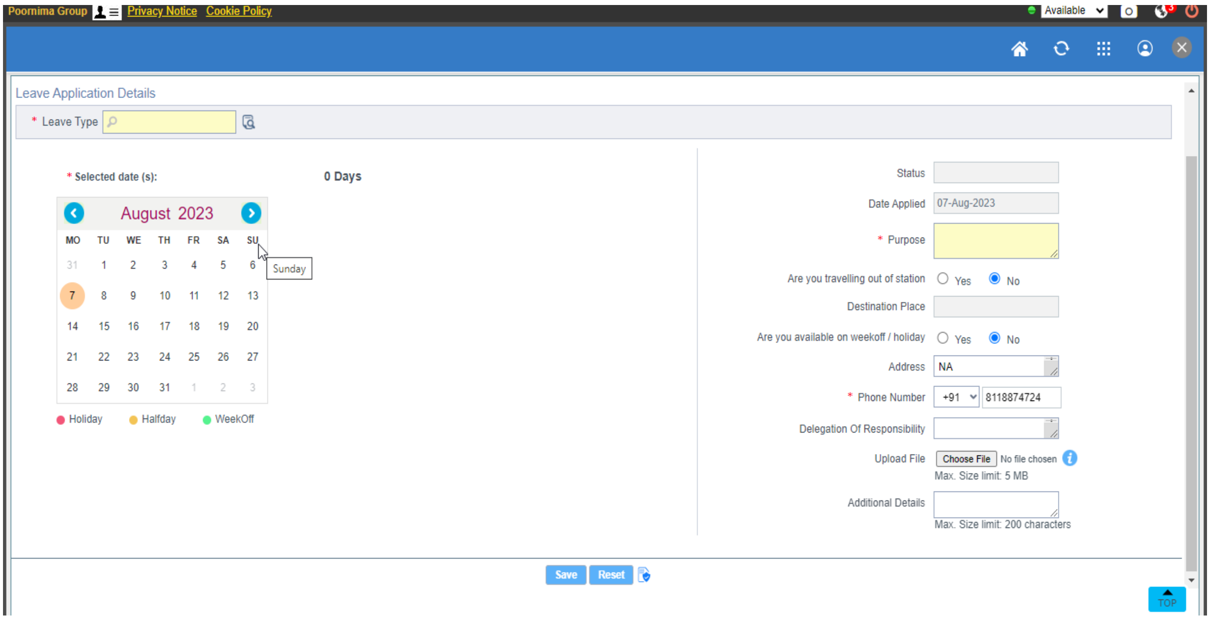

# Leave


# Leave Ledger

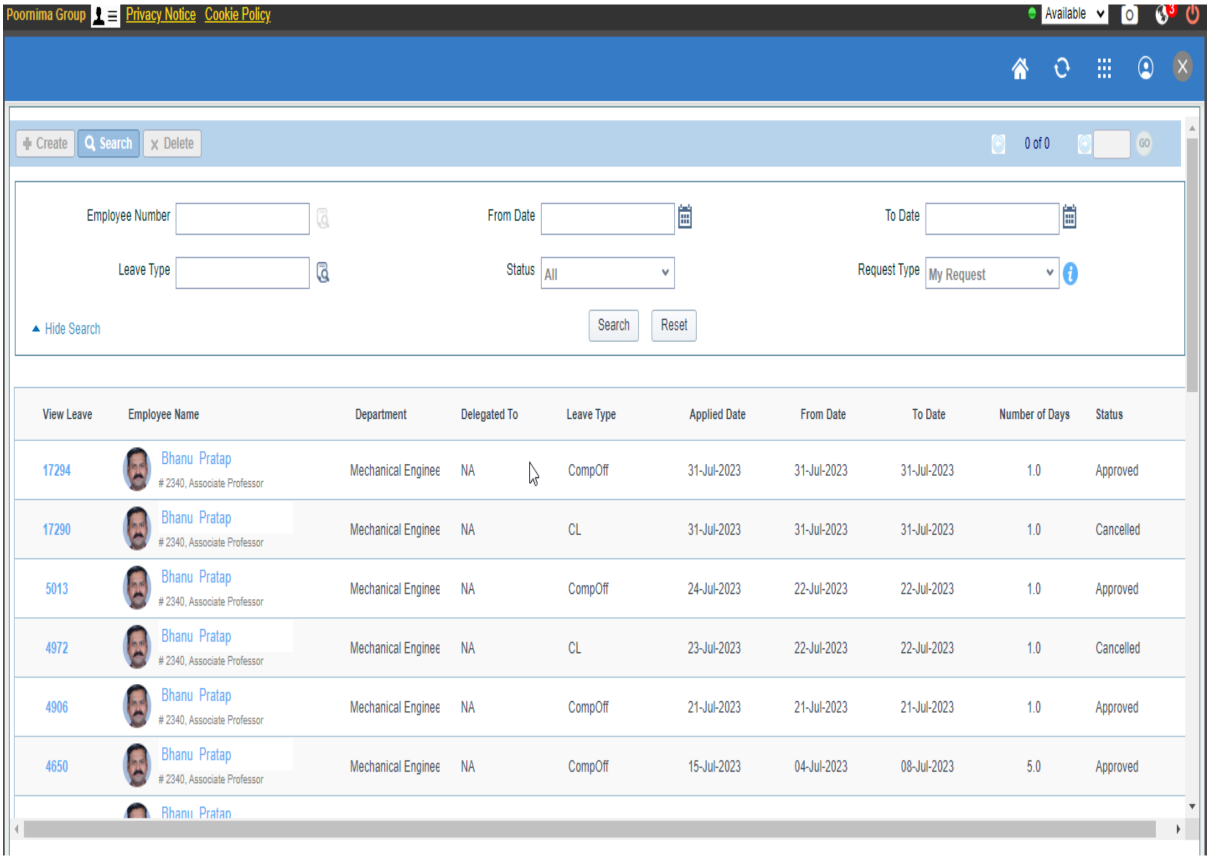



# Leave Application

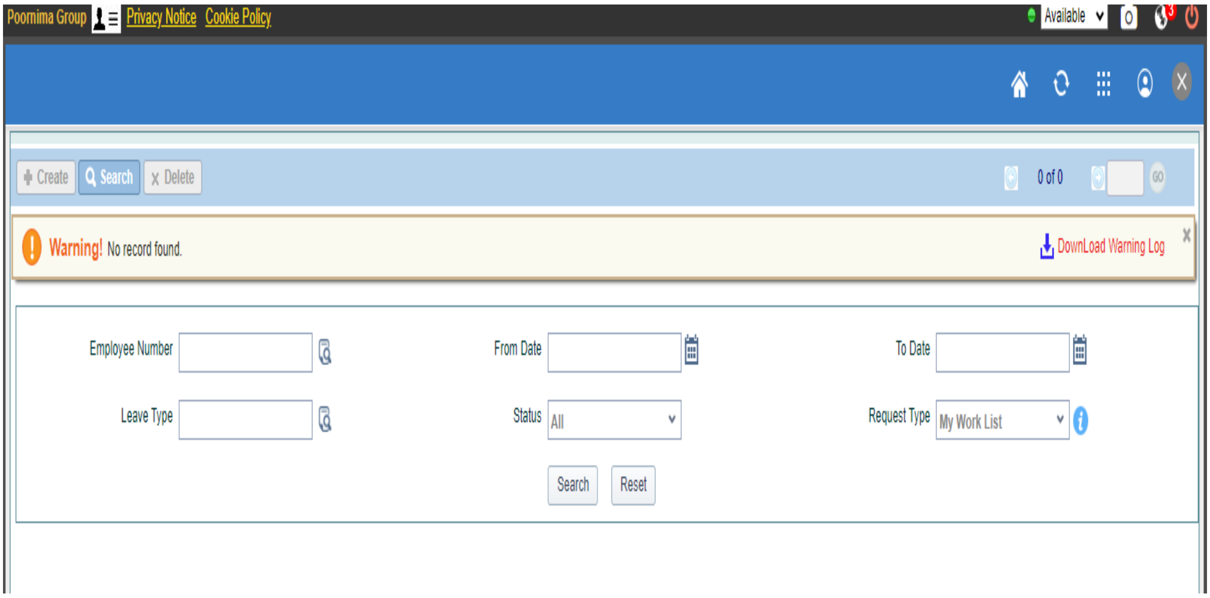



# View Request

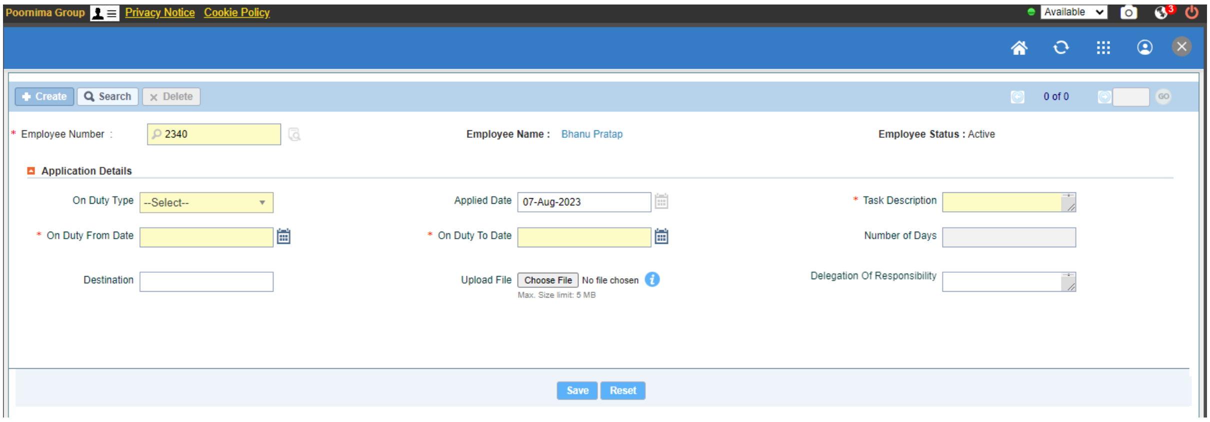



# View Worklist

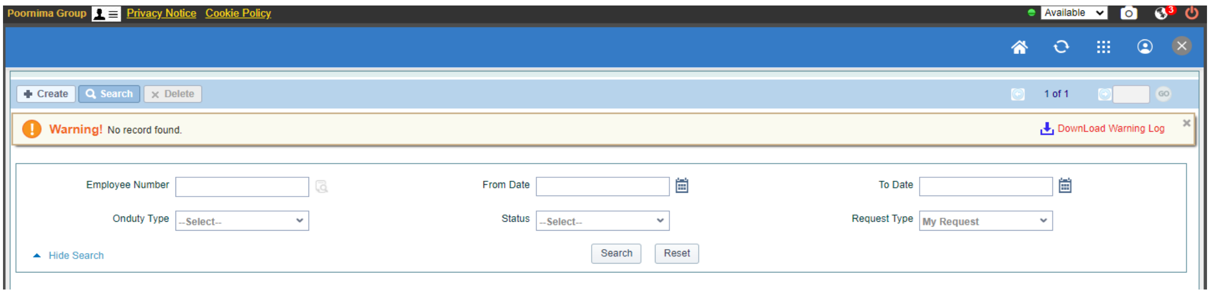



# Attendance

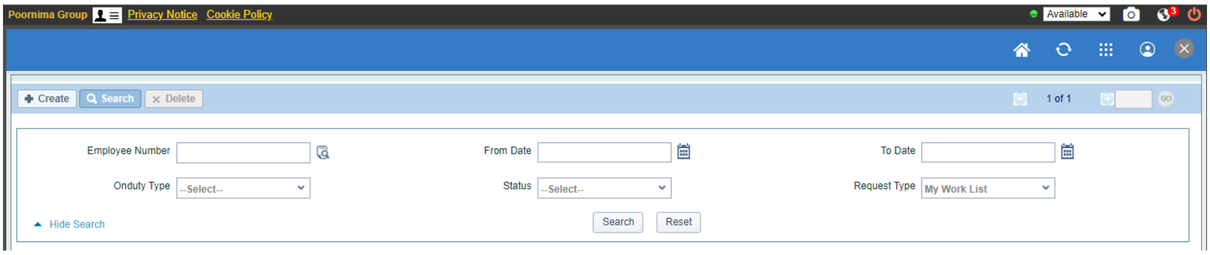

# On Duty Application



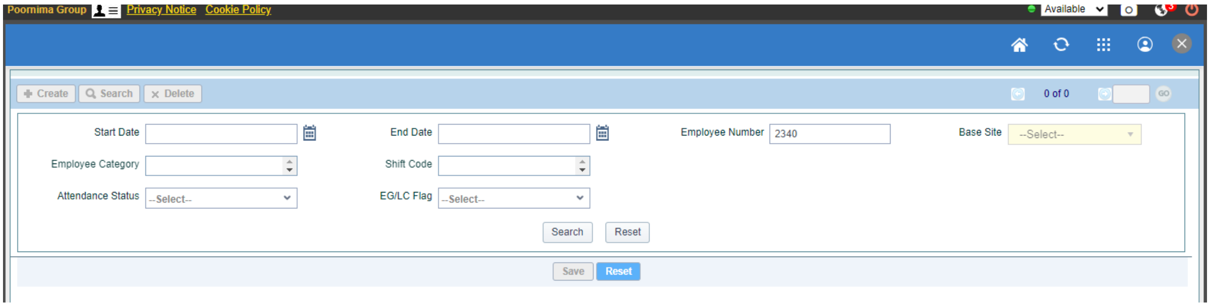

# On Duty View Request



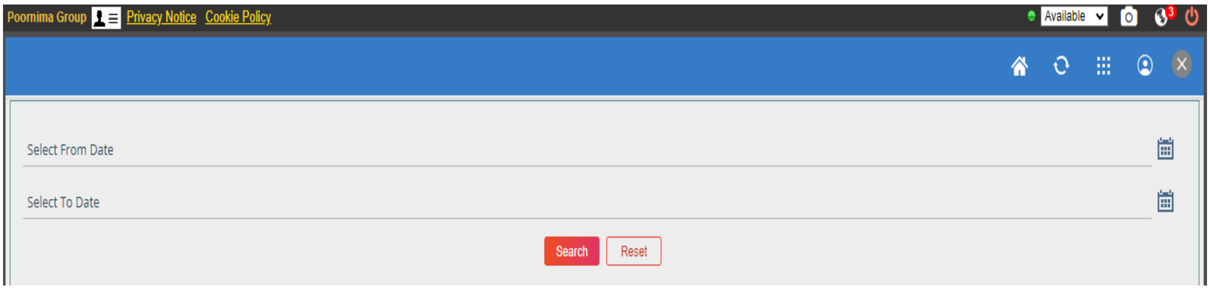

# On Duty Worklist




## Attendance Query

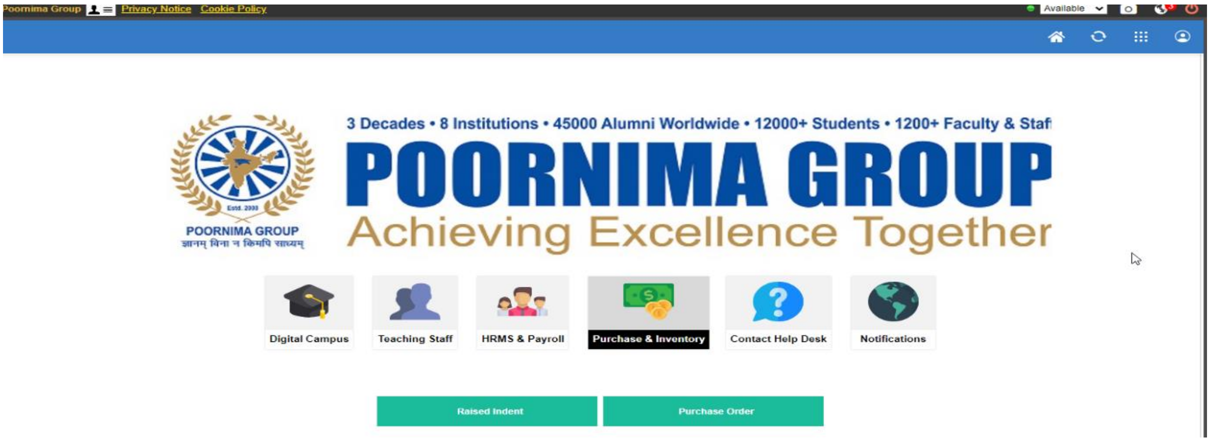



## Employee Swipe Access Logs

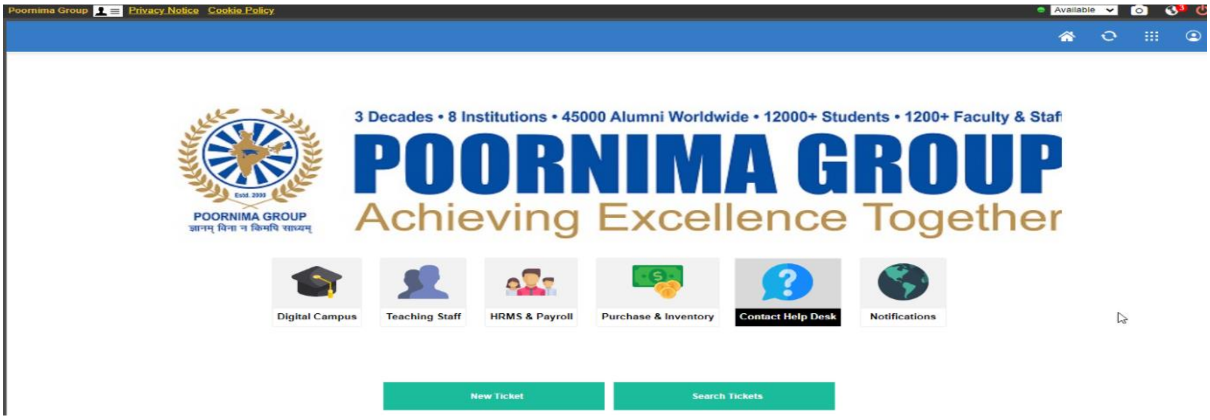



## Employee Benefits

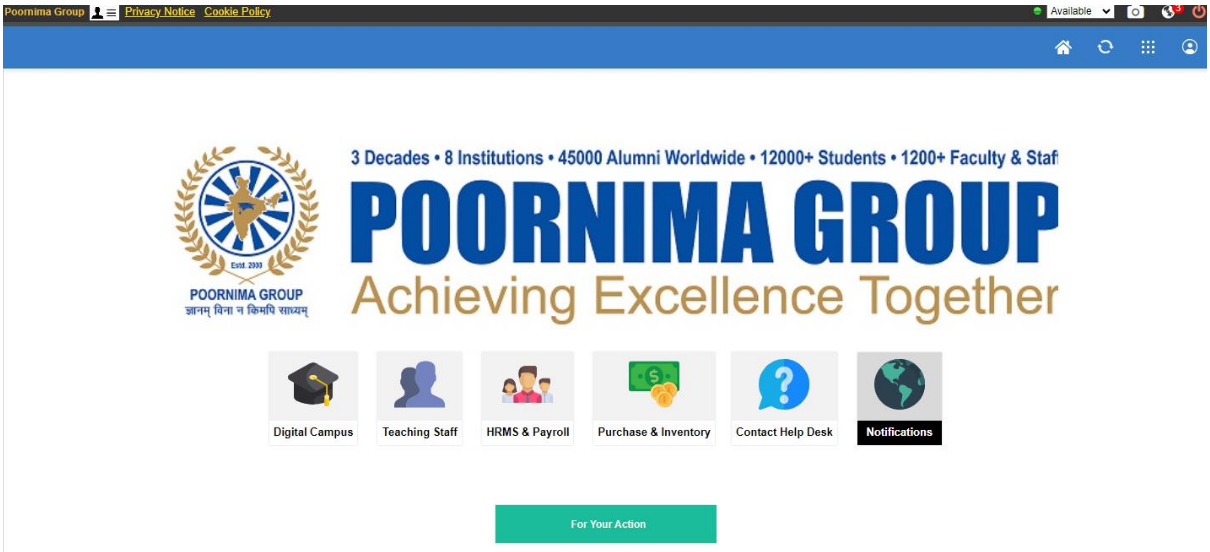

## Purchase & Inventory




# Contact Help Desk




# Notifications



# Digital Learning

## About the Solution

Digital Learning platform integrates Learning Management System (LMS), Collaboration and Communication to facilitate experiential learning for improved learner outcomes.

The platform architecture of Digital Learning supports a collaborative pedagogical model to enrich participatory learning by offering course delivery, assessment, reports and other learning opportunities in a secure, community delivery mode. Each Institute can create its own community of learners and these communities can be made more specific to classes and sections.

Digital Learning enables:

- Course planning, creation and delivery using the course tools such as course templates, syllabus, scheduling and pre-requisite features.
- Course content upload and sharing using the content tools that offer freedom to upload multiple types of files (documents, PPTs, video, audio, SCORM and ePUB) against a created course.
- Sharing your courses and communities with internal as well as external stakeholders, as required.
- Creating question papers and question banks for multiple assessment needs with built in evaluation tools that allow student monitoring and feedback.
- Designing grading schema.
- Creating certificate designs and generating them for learners on successful completion of exams.
- Creating institutional calendar and sharing with learners and instructors.
- In addition, some unique features of Digital Learning include:

- **Organisation Branding**: Configure organisation name, logo and tagline on Digital Learning platform. Once branding is configured, organisation name, logo and tagline replace Digital Learning branding on the platform for your organisation members.

- **Course Completion Certificate**: Award Course Completion Certificates to learners when the results are generated for a course. Instructors can configure format and design of certificates as required by uploading JSON/HTML templates.

- **On Demand Reports (ODR)**: Track subscriptions and activities in communities and courses with the three different ODR's designed for Community/Course Subscription, Invitation/Requests and Assessment Details. Administrators can design and save their own reports or select a report from the list of default saved reports.

- **Self-Paced Courses**: Offer courses without restricting enrolment dates by creating self-paced type of courses. Learners can enrol for self-paced courses and consume it as per their schedule.

- **Profile Permissions**: Configure permissions to allow or restrict access to various screens and features. Administrators can select the components and functionalities that can be enabled for each profile with the enhanced permission list. Labels for each permission have been made self-explanatory for easier selection.

## Solution Scope

Overview

The two TCS iON products Collaboration and Learning Management System (LMS) are available as one integrated offering, and as individual products in Digital Learning as per your organisational needs. The platform architecture of Digital Learning supports a collaborative pedagogical model to enrich participatory learning by **offering course delivery**, **assessment, Programming type online Assessment (HandsOn)** and other learning opportunities in a **community delivery mode**. Each Institute can create its own community of learners and these communities can be made more specific to classes and sections.

TCS iON Digital Learning platform provisions:

- **Collaborative Ecosystem through Communities**
- **A Learning Management System**

Scope of Service and Solution

Below are the features of iDL available to the clients:

1. Create / Manage communities
2. Add/ manage user profiles
3. Design the community page
4. Add/Edit/ Comment on/ Manage posts
5. Create/ Manage/ launch courses
6. Create/ Manage/ Launch Assignments, Assessments, Hands On programming interface in course
7. Manage Attendance with/without Live Conference
8. Tagging competencies, proficiencies with the Courses
9. Follow Learning path to achieve required Competency
10. Topic Tagging in Course/Community/Posts
11. Phygital Courses via Test center booking
12. Video Calling: One to one interaction (Paid Service & Licensing Fee applicable)
13. Face Verification and System Authentication for course access
14. Remote proctoring in Courses
15. Generate Course and Activity reports
16. Interactive Dashboard for Admins & Learners
17. Configuration for Post Display in Timeline after Admin Approval
18. General Data Protection Regulation (GDPR) compliance
19. Watermarking for Branding the Organization
20. Live chat and Group Chat in Community/Course
21. Enhanced learning with LinkedIn Learning, Enguru, MicrosoftLearn, IIHT, Thrive, Embrace, Udemy.
22. Video/Audio Capturing Functionality in community timeline and assignment
23. Live Conference via multiple vendors (Paid Service & Licensing Fee applicable)
24. Login through social media platforms and Facial Recognition
25. Suborganization concept within Master organization
26. Collaborate with third party content providers(based on contract)
27. Vendor Dashboard platform to configure 3rd party integrated platforms
28. Assignment questions and responses through Google drive
29. Plagiarism check using integrated tool(Copyleaks) for web-based content and in-built feature for checking peer to peer copied content
30. Sibling Login Feature – to login in your child account without credential
31. Cloud-based Virtual machine Hands-on Activity
32. Hands-on programming interface – IDE and third party integrated platforms
33. GAMELab content – Game Authoring and Media Enabling Lab content in the course with game play and learning

**The solution scope includes -**

- User Roles
- Community Management
- Learning Management

User Roles

- Organization Admin – To configure organization settings.
- Platform Admin – To access all Courses/Communities of the organization without getting enrolled.
- Course/Community Administrator/Moderator – To administer the Course/Community.
- Community/Course Admin
- Course Participant user – To access the enrolled Courses
- Community user - To access the enrolled Communities
- Course Faculty – To teach/evaluate the Courses/Assignment that are enrolled by Admin.
- Guest Faculty User – To teach/evaluate the Courses/Assignment as a Guest Faculty.

Customized roles can also be defined by copying/updating the access permissions of above roles.

## Community Management

**Organization Admin**

- Create/Manage Privacy Policy for the Organization & capture user consent
- Manage Multi-lingual labels for the organization
- Manage Org Logo/Tagline and Branding
- Create suborganization and configure settings individually for each suborg; course content approval by master org/suborg admins
- Create Communities administered by Admin profile
- Public (organisation users can send enrolment request)
- Private (users are enrolled by administrator's invitation only)
- Report Generation of communities
- Share communities and courses
- Users Management
- Assign/Manage User Profiles
- Assign Community/Course
- View Invitations
- Change Admin
- Single Dashboard view for various configuration in entire organization
- Self service
- SmarTask Chatbot – to guide users on platform features
- Web installer templates for bulk upload
- Third-Party Configuration
- Create/Manage External users
- View Organization Logs
- Notification Channel Management
- Define customized user attributes following  GDPR compliance
- Configure Badges/Achievements

**Community Admin**

- Profile Management – controlling the access of different profile users
- Add / Remove
- Define Profile
- Copy Profile
- Assign Users
- Manage Users/User Groups
- View Community Level Logs

- User Activity Logs
- Manage User Posts in Timeline
- Manage Abused Posts

**Community Design**

- Map suborganization to allow access of specific suborg users
- Detailed Member Profile
- Configurable Landing Page
- Community Banner
- Custom Menus
- Static Page
- Announcements

**My Stuff**

- Dashboard
- My Profile
- Courses
- Learning Path
- Communities
- My Competencies
- My Actions
- My Posts
- My Activities
- My Calendar
- My Favorites
- My History
- Manage Courses
- Platform

**Collaboration Enablers**

- Create Blog post
- Create Byte
- Upload Media
- Ask a Question
- Post an Idea
- Schedule an Event
- Start a Debate
- Add User Poll
- Conduct Survey
- Live Conference via multiple vendors (Impartus, Vbrick, Vidyo, Zoom, Manual, Livecast – In-house TCS product, MS Teams with/without Outlook calendar notification)
- Post a Quiz

**Enabler Features**

- Copy link and share on other platforms
- Add to favorite
- Add a Comment
- Vote a Comment
- Reply to a comment
- Post a reply
- Give rating to Media and Blog
- Publish Recommended post
- Share via email & Whatsapp

- Share with roles
- Share post on social media platforms (Facebook, Whatsapp, Twitter, Linkedin)

**Invitations**

- Criteria
- Assign Criteria
- Invite Users

**Message Box**

- Invitations
- Requests

## Learning Management

**Administration**

- Course Templates Management
- Course Batches Management
- Manage Roles – Faculty, Student, Course Admin
- Student Enrolment in Courses
- Course Catalogue
- User Activity Logs
- Map users with Suborg in Manage users option
- Reply to user queries via ERC (Email Reply Capture)

**Report Management**

- Generate course reports
- View list of students enrolled in the course
- View number of attempts for every activity
- View overall grades
- View faculty feedback in Activity evaluation
- View courses wise percentage
- View attendance for each student
- Plagiarism Report for Assignment and Hands-on Activity
- Face registration details & status

**Course Design**

- Course Summary
- Add competencies/proficiencies in Course
- Map suborganization to allow access of specific suborg users
- Syllabus
- Course Content
- Course Attendance with auto attendance criteria
- Grades and Reports
- Discussion Forum Activity within Course
- Course Completion Certificate (with QR code for validation)
- Add course (External Vendor)
- Event Management with multiple Activities of iDL
- Provide feedback for Course via rating
- Add Courses to create Learning Path for learners

**Activities**

- Assignments
- Assessments – Secure Assessment, Remote Proctoring Assessment
- Interactions – to capture attendance and conduct Live sessions/webinars
- Hands-on Programming Interface
- Discussion Forum – allow collaboration among learners to evaluate them

- Assessment with Hands-on (Remote proctoring enabled)
- Cloud-based Hands-on with Assessment (Remote proctoring enabled)
- PAPER Activities

**Hands-on Programming Interface**

a) Programming with Lite editor

- Lite editor IDE and auto evaluation in programming languages (Java 8, Python 2.7 & 3, Perl, Erlang, Go, Node.js, Ruby, R, C, C++, .Net, C#, Scala, Lua, Haskell, Kotlin, UNIX, Pyhton 3.8 Advance)
- QP and QPT (Programming type Questions) support - Created in CAE with auto evaluation of Submitted code.
- Practice(Sandbox) activity can be configured without evaluation.
- Supports single file exercises (Single class programs – Write and see output on command line)
- Multiple programming languages can be configured in a single question for learner choice
- Lite editor status Dashboard to monitor the user actions real time (Compile, Submit, Launch) during the exam.
- Plagiarism Scan - Done among peers for copied code (Copied percentage can be checked in Plagiarism report), and for web copied code as well (External vendor 'Copy Leaks' license needed)
- Watermarking for user identification in Hands-on Lite editor
- Remote Proctoring enabled, Command Center & Live Chat integration available for large scale event (Can be launched from within IBA along with RPA, or directly through iDL / iDLH)

b) Virtual Machine based Hands-on

- Virtual Lab with dedicated "Virtual Desktop" environment to code.
- Remote machine setup (with AWS VMs) with various pre-configured technologies (like Django, Microsoft SQL Server, Visual studio, Open Office, R, Apache Tomcat, Puppet, Sublime Editor, Notepad++, My SQL, NodeJS +Redux, Python3 + TensorFlow +Numpy + Matplotlib + Quandl, Wireshark, Android Studio, Eclipse with JRE, Redis Server, Git, etc.)
- Support of Custom Operating system
- Remote proctoring enabled available for large scale event (Can be launched from within IBA along with RPA, or directly through iDLH)
- Rubric marking available for Faculty evaluation
- Multiple Questions with guidelines (Get displayed on VM launch in a Chrome browser window), Customized wallpaper, Timer to indicate VM switch OFF, Local printer, Internet connectivity in VM, etc.
- File fetch & marking utility is installed in Faculty VM to push the candidate response and score upload sheet back to iDL Course.
- Faculty and student mapping in VM to allow the specific student files to be visible in VM for the relevant Faculties based on a particular attribute like skills, etc.
- Group Hands-on with group specific folders created in VM for each group.

c) Third-Party integrated platform for Hands-on

- Integration for SSO and pulling marks with various 3rd party providers - Katacoda, Hackerrank, Mettl, SHL
- Dotin platform capability can also be accessed

- Needs 3rd party license

**Assignment**

- Peer to peer evaluation
- Group Assignment
- Attribute Matching for Faculty Evaluation
- Rubric Marking
- Continuous Feedback for Learners
- Multiple evaluations by Faculties

**PAPER Activities**

- QPD (Question Paper Distribution)
- QPD with scan
- Conduct Practical
- OMR

**Course Content**

- Manage Syllabus
- Create Webpage/File/Text based Content
- Multiple files upload in a single node of course with progress tracking
- Displaying YouTube/ Vimeo videos within iDL Platform
- Create content from repository
- Create Quiz/Survey/Blog/Question/Media/Poll/Debate in Course content
- Upload SCORM/ TINCAN based Content
- Display recommended content as Learning Aid in Course
- Upload Gamified SCORMs –

a) Customized Assessment and Learning Content in GAMELab cartridgesa)

b) Available games - Race2Recharge, Super Striker, Ace de Pace, Quest for Gems, Reaction Time test, Car Race

**Course Delivery Control**

- Share and Schedule Content
- Sync Content Data
- Schedule Assignments/Assessments/Interactions/Hands-on
- Configure Mandatory Units in Course
- Add Prerequisites of active units/Courses Enable cool-off duration for Course content.
- Create Event for the Learning Activity & Content

**Face Verification and System Authentication**

- Course Level Settings
- Student Registration – either Learner initiated or Admin can register
- Student Authentication – either Admin can authenticate and provide access or student authenticates himself
- Bypass Authentication – configuration for Admin
- Registration & Authentication Logs
- Remote Proctoring in Courses – monitor the student while reading course content and Faculty to take relevant action for malpractice.

**Student Items**

- Course Dashboard
- Course Content Player
- Actions
- My Competencies – View Inprogress/Completed competencies and analyze the skill journey - skill gap of current role and set aspirational roles based on growth in current role, growth within industry domain or growth within organization.

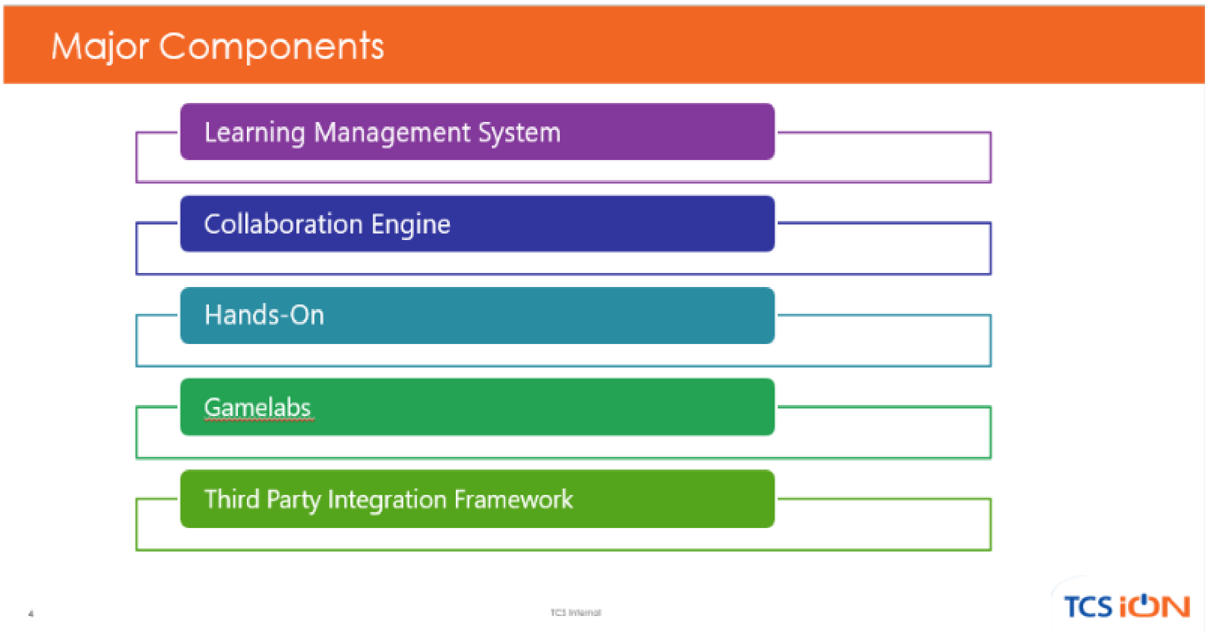
- Learning Path – Follow/Unfollow the paths to achieve the required competency in system.
- My Report Card
- Communities Dashboard
- Post
- Favorites
- History of my activities
- Ask queries to Admins and send reminder for unanswered queries
- User profile page displaying attributes along with consent icons to give permissions (As per GDPR guidelines), post appreciations on user profile
- Explore the public Courses/Communities and get enrolled

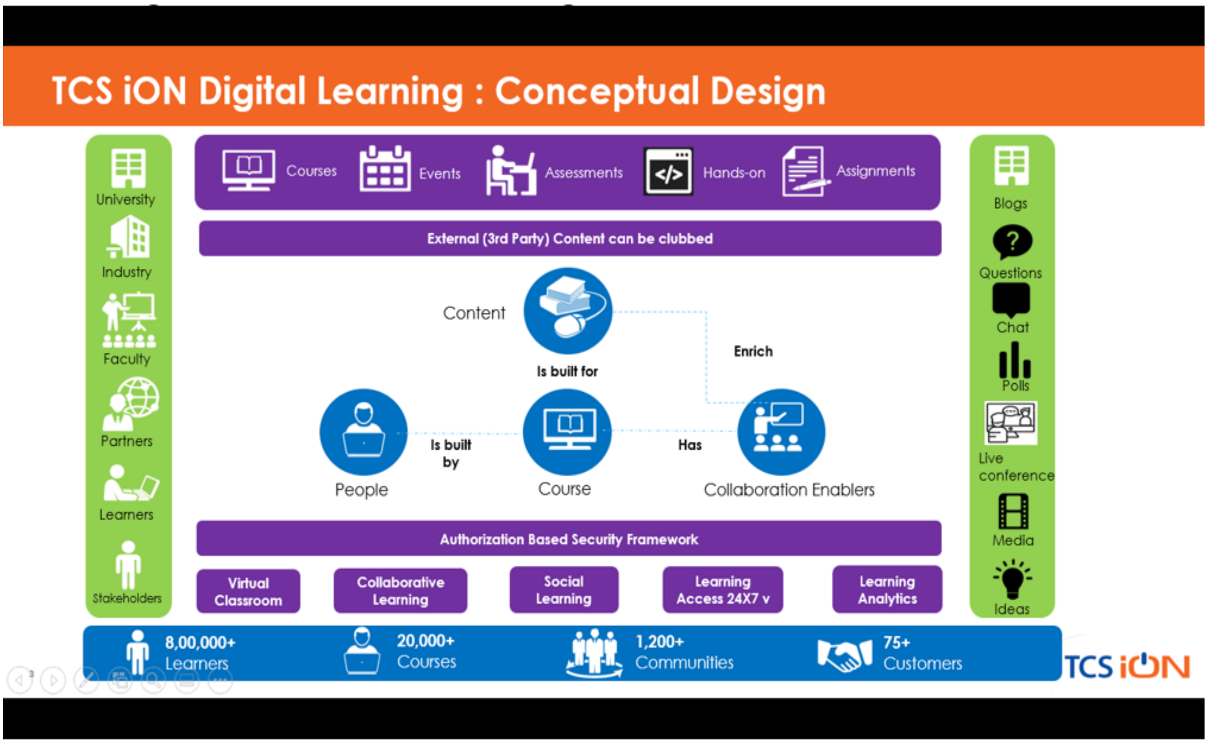
**Settings**

- Edit Time zone
- Change Language
- Change Password
- Manage Devices
- UCP Configuration
- Switch to the Sibling login: access child account without login credentials
- Admin app screen for multiple activities (course creation, static page upload, banner/logo upload and user activation) in multiple organizations on single click

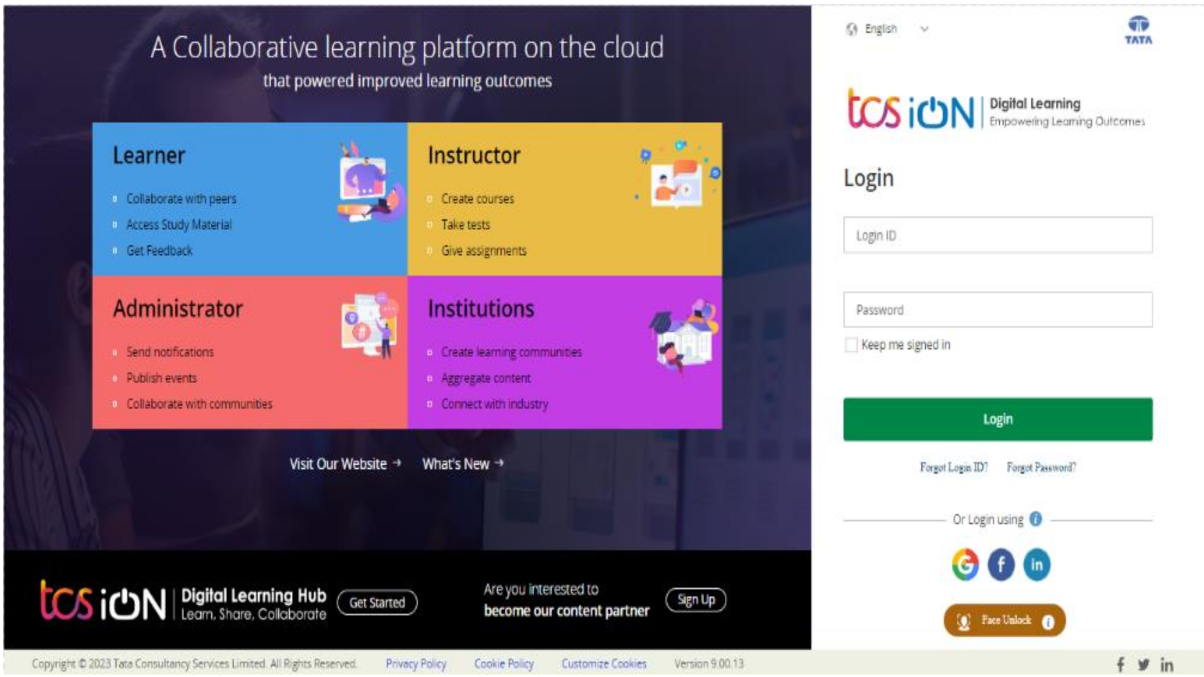
**Mobility**

- mTOP App - Android and iOS application available for mobile devices
- PAPER LEARN available to enable offline learning without Internet






## Getting Started

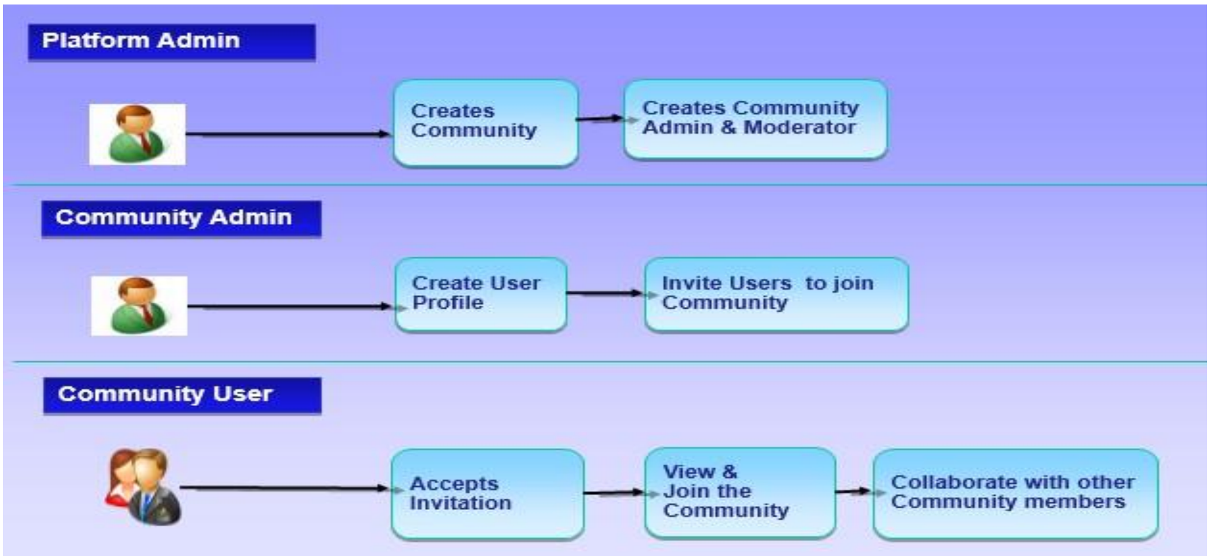



## User Access Roles

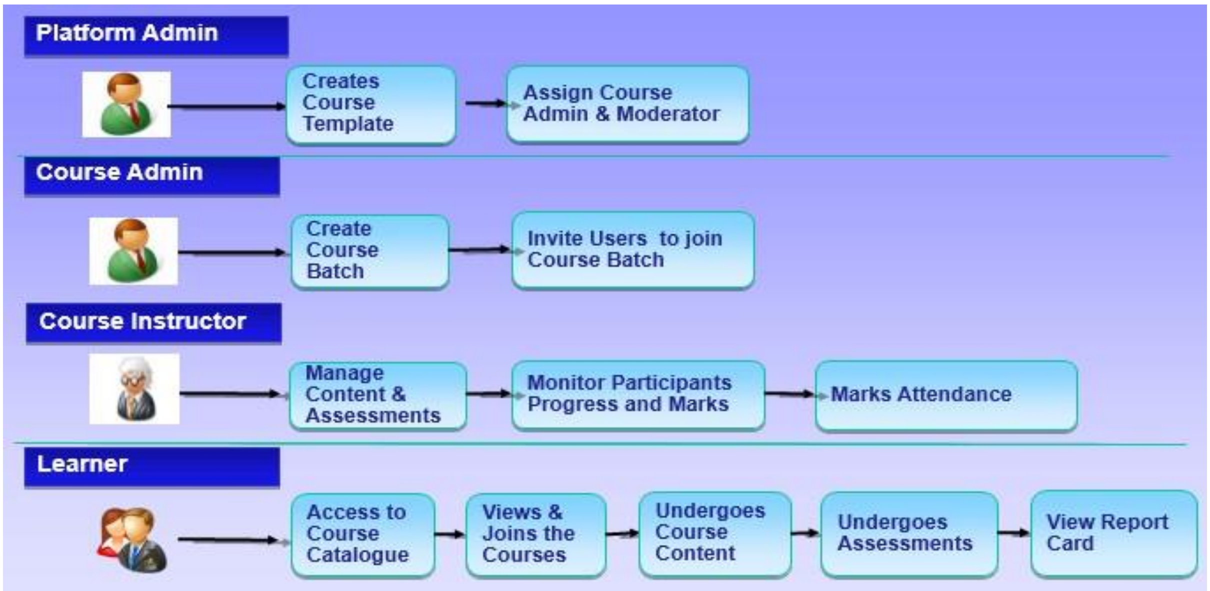
Access to various modules and screens in the iON Digital Learning solution is based on your role/profile in the organisation. For example, an administrator has privileges to configure and access all modules, whereas other users have limited access to the functionalities in the module to perform certain tasks.

Roles and responsibilities of iON Digital Learning members is shown below. These roles are fulfilled, using the profile permissions provided as described in the table.

### Community Roles




### Course Roles




## Default Profiles in iON Digital Learning

When the solution is provisioned to the customer, following users can be created for the iON Digital Learning solution:

| Profiles | Profile Description |
|---|---|
| **Organisation Community** | |
| **Organisation Administrator** | • Create Digital Learning user ID's.<br>• Has administrative rights on Webtop. |

| Profiles | Profile Description |
| --- | --- |
| | • Has access to Preferences in Settings to manage Organisation branding, manage the administrator of all Communities/ Courses in an organisation, vendor addition for third party integrated apps and manages the configuration set for mobile, chat, watermarking and so on.<br>***Note***: Only organisation admin can change the Org Administrator from Platform. |
| **Platform Administrator Users** | • Manage all communities and courses of the Organisation.<br>• Manage sharing of Courses/ Communities with other Organisation.<br>• Has access to Platform Menu in Left Panel to create and perform administrative tasks for all communities and courses. |
| **Organisation Community Administrator User** | • Manage only the Organisation Community of an organisation.<br>• Has access to Manage Menu in organisation community only.<br>• Does not have Organisation Administrator privileges. |
| **Organisation Community User** | • Collaborate and mark your presence in the Organisation Community only.<br>• Can select and send enrolment request to other communities and courses. |
| **View Only Organisation User** | • View only member of organisation community. |
| **Community External User** | • Collaborate as an External member. |
| **Community Parent User** | • Keep a track of your ward and collaborate to make a difference. |
| **Community Student User** | • Collaborate and make a difference.<br>• Can select and send enrolment request to other communities and courses. |
| **Normal Community** | |
| **Community Administrator / Community Moderator** | • Manage the Community and other Administrators of the Community.<br>• Profile assigned while creation of community only.<br>• Has access to Manage menu in Top panel. |
| **Community Administrator User** | • Manage the Community and help users to collaborate peacefully<br>• Added as administrators to community/course sometime after creation by **Community Administrator / Community Moderator**.<br>• Has access to Manage menu in Top panel. |
| **Community User** | • Collaborate and mark your presence in the Community<br>• Can select and send enrolment request to other communities and courses. |
| **View Only Community User** | • View only member of community |
| **Community External User** | • Collaborate as an External member |
| **Community Parent User** | • Keep a track of your ward's activities in community. |
| **Community Student User** | • Collaborate and make a difference |
| **Course** | |
| **Course Administrator / Course Moderator** | • Manage the Course Batch/Template and other Administrators of the Course<br>• Profile assigned while creation of course only.<br>• Has access to Manage and Course Tools menu in Top panel. |

| Profiles | Profile Description |
|---|---|
| **Course Administrator Users** | • Manage a Course Batch/Template and faculty/instructor of the Course.<br>• Added as administrators to course batch/template sometime after creation by **Course Administrator / Course Moderator**.<br>• Has access to Manage and Course Tools menu in Top panel. |
| **Course Faculty User** | • Manage a Course Batch for participants and manage them.<br>• Has access to Course Tools menu in Top panel. |
| **Course Participant User** | • Enrol to a Course, study it and get course completion certificate and report card. |
| **Course View Only Participant** | • View only access. |
| **Course Parent User** | • View activities, progress and reports of your ward. |
| **Course Guest Faculty User** | • Create a Course for participants and manage them as a Guest Faculty/Instructor.<br>• Has access to Course Tools menu in Top panel. |
| **Course Guest Participant User** | • Enrol to a Course, study it and get course completion certificate as a guest participant. |

## How to Enrol for a Community

### Overview

Organisation members can view all public communities and send requests to join a particular community. The community administrator of the selected community will receive this request and after approval from the Community Administrator, organisation members are enroled in that Community.

### Procedure: Enrol for a community

1. Click (Explore) from the top panel to view public communities of your organisation.
   Or, go to Left Panel >> **Explore** >> **Communities** to view communities shared by other organisations.
2. Select **Communities List**.
3. Search for the Community you wish to join.
4. Click **Join Community**.
5. Select a role from **I want to join as** a dropdown. The permissions to perform tasks in the community are defined on the basis of roles/profiles, hence your selected role will define the permissions you seek while joining a community. To view more about User Access roles, **click here**.
6. Click **Send Request**.

### Result

- Enrolment request is sent to the Community administrator. The community will be accessible to you in Left Panel >> **My Communities** after approval from any one of the Community administrators.
- You can view the status of your enrolment request in **My Actions** >> **Sent**.

## How to Enrol for a Course

Organisation members can view all public courses and send request to join a particular course. Course administrator of selected course will receive this request and after approval from Course Administrator, you will enroled to that Course.

### Procedure: Enrol for a Course

1. Click (Explore) from top panel.
   Or, go to Left Panel >> **Explore** >> **Communities** to view communities shared by other organisation.
2. Select **Course Catalogue**.
3. Search for Course you wish to join.
4. Click **Enrol Now**.
5. Select a role from **I want to join as** dropdown. The permissions to perform tasks in the community are defined on the basis of roles/profiles, hence your selected role will define the permissions you seek while joining course. To view more about User Access roles, **click here**.
6. Click on **Send Request**.

### Result

- Enrolment request is sent to Course administrator. The course will be accessible to you in Left Panel >> **My Courses** if you are enroled to course as a learner/participant, after approval from any one of the Community administrators. If you are enroled to course as a Faculty/Course Administrator, you can access course from **Left Panel** >> **Manage Courses**.
- You can view the status of your enrolment request in **My Actions** >> **Sent**.

***Note:*** You can unassign yourself from the community/ course created while creation of the community/ course. To use this feature, you must select the Unassign checkbox to drop from the community/ course in which you are enroled.

## Manage Invitations and Requests

A member can be enrolled to a community by members choice or with forced invitation. If the administrator invites by members choice, the member has to accept the invitation to become a member of that community. If the admin force invites the user, the member is notified of the membership to the community.

### Procedure: Manage Received Invitations/Requests

To view/accept/reject invitations and requests:

1. Click **My Action** on left panel.
2. Select **My Organisation** or **Other Organisation** tab to filter requests on the basis of organisations.
3. Open **Inbox** tab to view received invitations and requests.
4. Select All(11) (11) (42) to filter request list as **All**, **Pending** and **History** invitations/requests.
5. Select an Invite or a request and Click **Accept**/**Reject** to accept/reject enrolment.

Or, Multi select requests and click **Accept**/**Reject**.

6. Specify **Comments** and click **Submit**.

### Procedure: View Sent Invitations/Requests

To view sent invitations and requests:

1. Click **My Action** on left panel.
2. Select **My Organisation** or **Other Organisation** tab to filter requests on the basis of organisations.
3. Open **Sent** tab to view sent invitations and requests.
4. Select 

to filter request list as **All**, **Pending** and **History** invitations/requests.
5. Select a Sent invite or request and Click **Accept**/**Reject** to accept/reject enrolment.

Or, Multi select requests and click **Accept**/**Reject**.

6. Specify **Comments** and click **Submit**.

### Procedure: View Force Invite Notification

To view force invitations:

1. Click **My Action** on left panel.
2. Select **My Organisation** or **Other Organisation** tab to filter requests on the basis of organisations.
3. Open **Inbox** tab to view received invitations and requests. View invitation notification in Inbox

## Learning in a Course Batch

A **Course Batch** in iON Digital Learning is a group formed for learning, with defined syllabus, content, activities, scheduling, learners and instructors.
In a Course Batch, there are defined learning objectives for learners. iON Digital Learning team offers collaboration tools along with learning in a course batch.
If your organisation permits collaboration in course batches, you can share posts with your peers and instructors for collaborative learning. To learn more about sharing posts, refer [Collaboration].

### Course Types

There are two types of course batches in iON Digital Learning:

1. **Regular Course**: The Courses of regular course batch type have *fixed enrolment start and end date*. You can choose to enrol between the specified dates only. You need to complete all learning activities before the Course Batch end date.
2. **Self-Paced Course**: The Courses of self-paced course batch type have *flexible enrolment dates*. You can choose to enrol at your convenience. Even though the enrolment is flexible, the learning duration is fixed (i.e., the number of days the course will run for). Hence when you enrol for a self paced course batch, the course batch completion date is calculated by adding the learning duration to your enrolment date. You need to complete all learning activities before the calculated course batch end date.

### View and Enrol Courses

My Courses in Left Panel lists all Course Batches where you are a participant. You can select to filter the course batches based on course batch type. You can select a course from My Courses menu to view its content and start learning.

To enrol for more courses, search the Course Catalogue in Launch menu in Top Panel. Refer **Getting Started** >> **Enrol to a Community or Course** >> Enrol into a Course.

### Assignments

Learners can view assignments on the content dashboard. There are two type of assignments :

- **Online**: Response has to be submitted online
- **Offline**: Questions can be read online or downloaded and marks can be viewed when faculty upload marks for it.

### Learning in My Courses

Learners can access only My Courses to access course batch content. They can perform following activities in a course batch:

| | | | |
|---|---|---|---|
| **Learning** | View Course Content | Comment on Course Content in Content Player | Mark Course Table of Contents node Completed |
| **Assignments** | View Offline Assignment | View Online Assignment | Submit Online Assignment |
| **Assessments** | Attempt Assessment | View Assessment Attempt history | |
| **Finish Course** | View Assignment Evaluation | Download Report Card/View Activity Status | Download Course Completion Certificate |
| **Hands On** | View the HandsOn | Attempt the HandsOn | Submit the HandsOn |
| **Discussion Forum** | View the topic | Participate in discussion | View the result |
| **Interaction** | View the Interaction scheduling | Join the Interaction | |
| **Assessment with HandsOn** | View the Assessment | Attempt the Assessment | Attempt the Assessment |

## Instructor's Manual

A person who teaches a subject or skill. iON Digital Learning provisions tools for instructors to plan course outline, content, delivery schedule, grades, reports, attendance, certificates etc.
Manage Learning
iON Digital Learning provisions Course Template and Course Batch structure for learning management system (LMS).

- **Course Templates** are blue prints of course design. The layout of the course is defined in a course template. The layout of the course consists of course contents, syllabus, grading scheme, activities, content schedule and share level, attendance codes, batches and activity domain. You can define all the parameters for a course delivery in a course template. A course batch is always derived from a course template. Hence to create a course batch, you need to first create a course template.

- **Course batches** are derived from Course Templates. You can create batches from a course template if you are a course administrator. Course batch is created as a replica of course template with additional configurations to add learners, view reports, attendance of learners and capability to update the configurations copied from course template. Learning in Digital Learning always happens in a Course batch, i.e., instructors and learners can only be assigned to a course batch.

If you have to design a course with same configuration and content, for more than one batch, you can create a course template as a master course and then create batches from course template. The batches can be named section-wise for identification.

You can access following Instructor Tools, if you are an Instructor or a Course Administrator in a template or batch on course homepage accessible from **Left Panel** >> **Manage Courses** >> Particular Course, the various activities you can perform for the course layout are:

| Syllabus | Content | Schedule | Sessions and Attendance Codes |
|---|---|---|---|
| Create/Update Syllabus | Add Content | Schedule/Share Content | Create Master Attendance Code |
| Indent/Outdent topic in Table of Contents | Edit Content Revision | Map Activities to Units | Assign Attendance Code from Master Attendance Code list |
| Add/Edit Description | Add Reference | Create Sessions | Un assign Attendance Code |
| Add Units | Delete Content | Map Course Units/Topics to Sessions | Create Sessions |
| Add Instructor | | Un-map Units from Sessions | Publish Sessions |
| Remove Module/Topic | Download Content | Add Prerequisite | Delete Sessions |
| | | Sync Course Batch and Course Template Data | |
| | | Preview Course | |

| View and Mark Attendance | Activities | Grading Scheme | Reports and Certificates |
|---|---|---|---|
| Take/Edit Attendance in Course Batch for a session | Create Activity | Create Grading Scheme | Download Report |

<table>
<tr><th>View and Mark Attendance</th><th>Activities</th><th>Grading Scheme</th><th>Reports and Certificates</th></tr>
<tr><td>Take/Edit Global Attendance in Course Batch for all sessions</td><td>Map Grades</td><td>Map Activity to a Grading Scheme</td><td>Upload Marks/Grades</td></tr>
<tr><td>View Attendance</td><td>View Monitoring Dashboard</td><td>Configure Grading</td><td>Configure Course Completion Certificates</td></tr>
<tr><td>Generate report for attendance</td><td>View Assessment</td><td>Edit Grading Scheme</td><td rowspan="6">Upload your Macro For Report</td></tr>
<tr><td>View Global Attendance</td><td>Upload Marks/Grades</td><td>Delete Grading Scheme</td></tr>
<tr><td rowspan="4">Generate report for global attendance</td><td>Download Activity Report</td><td>View Grading Scheme</td></tr>
<tr><td>Edit/Delete Activity</td><td rowspan="3">Add Course Level Pass Percentage</td></tr>
<tr><td>Schedule/Reschedule Activity</td></tr>
<tr><td>Participant Stats</td></tr>
</table>

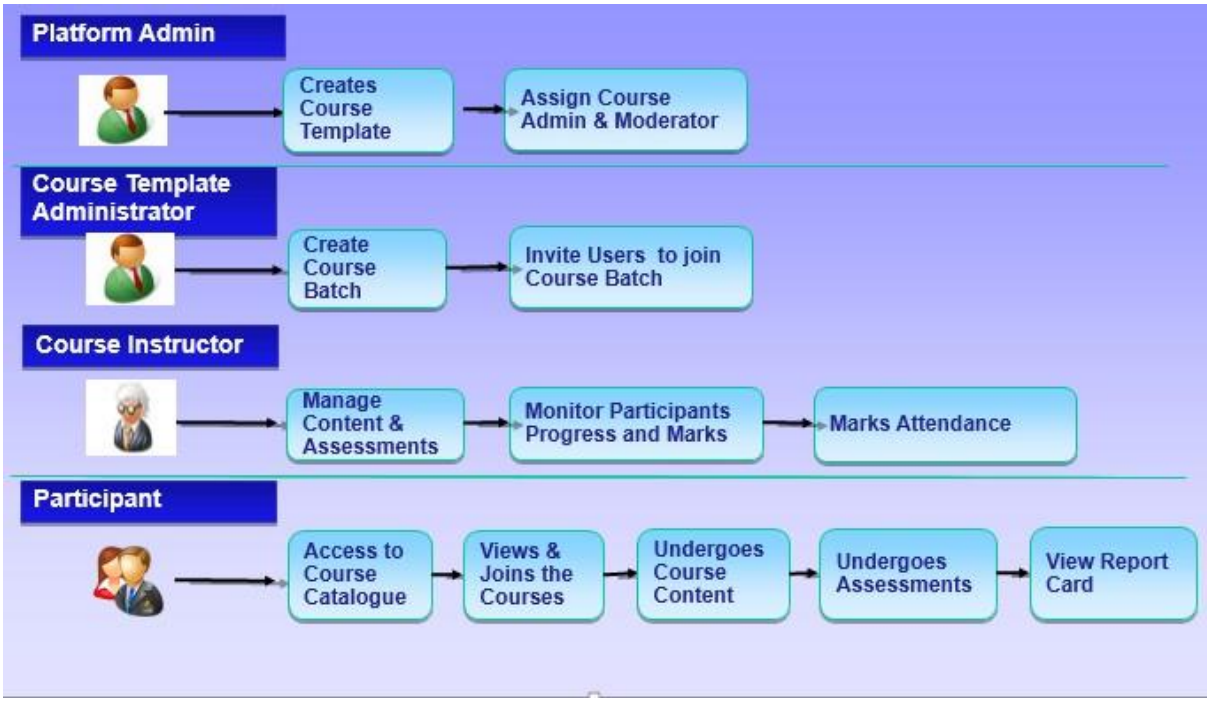
## LMS Roles in Digital Learning

The various administrators related to iON Digital Learning LMS are –

- Platform administrator
- Course Template administrator
- Course instructor

These roles have access to Course Tools menu on course home page for course management activities. All LMS activities can be performed from Course Tools menu.

The privileges for each of these administrator types is depicted in the picture given below:




A **platform administrator** can create course templates in iON Digital Learning. While creating course templates, platform administrator defines **two course template administrators** for each Course Template. The two course template administrators can add **instructors** to course. The course template administrators and instructors can manage the course content, syllabus, delivery schedule, content share levels, grading scheme, course completion certificates, course reports to create a layout for course.

A course template administrator in course template can create course batches. While creating a course batch, course template administrator defines **two course batch administrators**. Course batch administrator can add further instructors and learners to course batch and manage course layout together with instructor.

Course Template Administrator and Course Batch Administrator have additional access of Manage menu on Course Homepage for administrative activities of course template and course batch respectively.

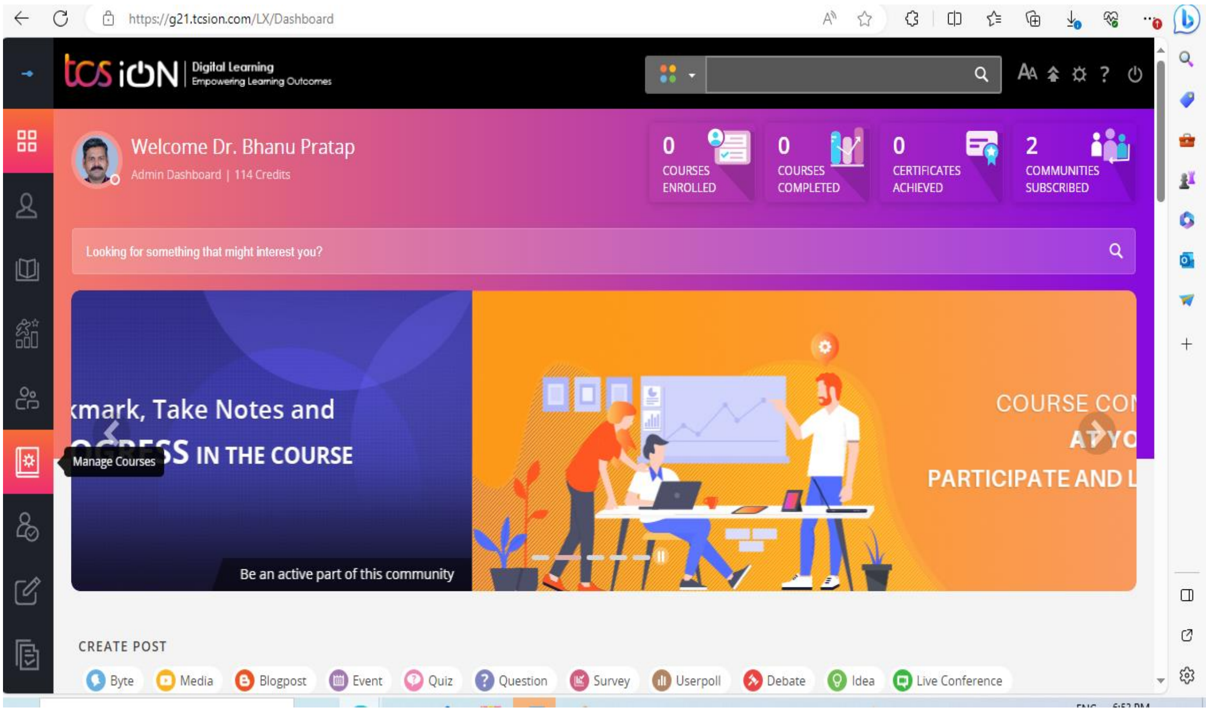
Learner role in iON Digital Learning is **Participant**. A participant member can view all enrolled course batches in **My Courses** from Left Panel.

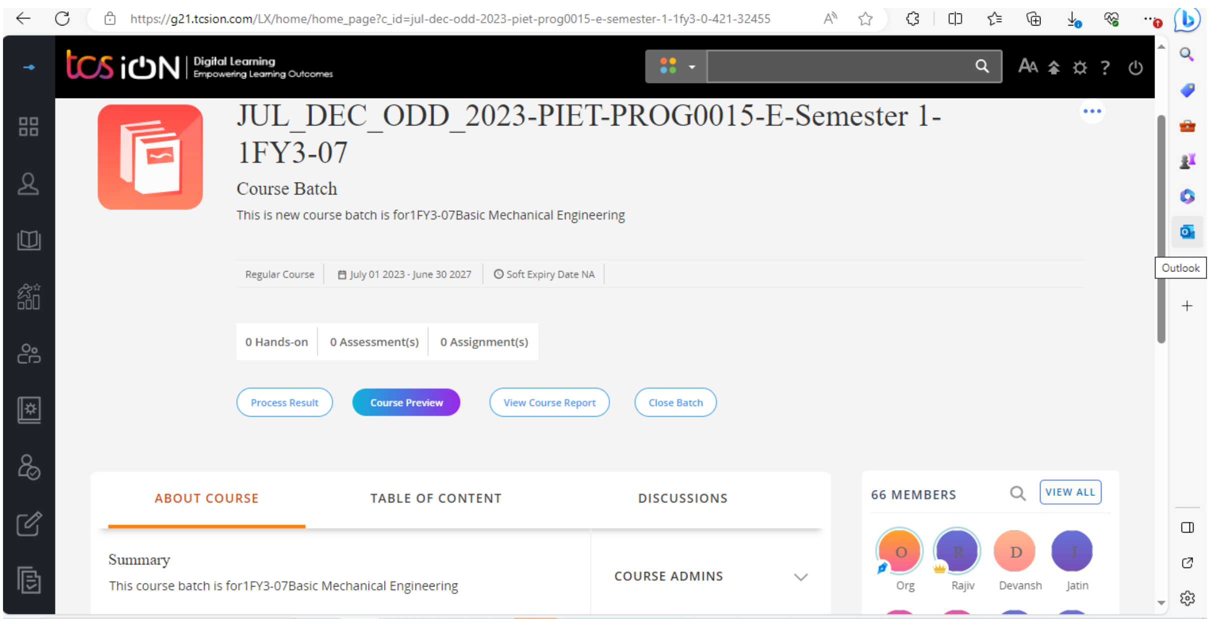
## LMS Content Update

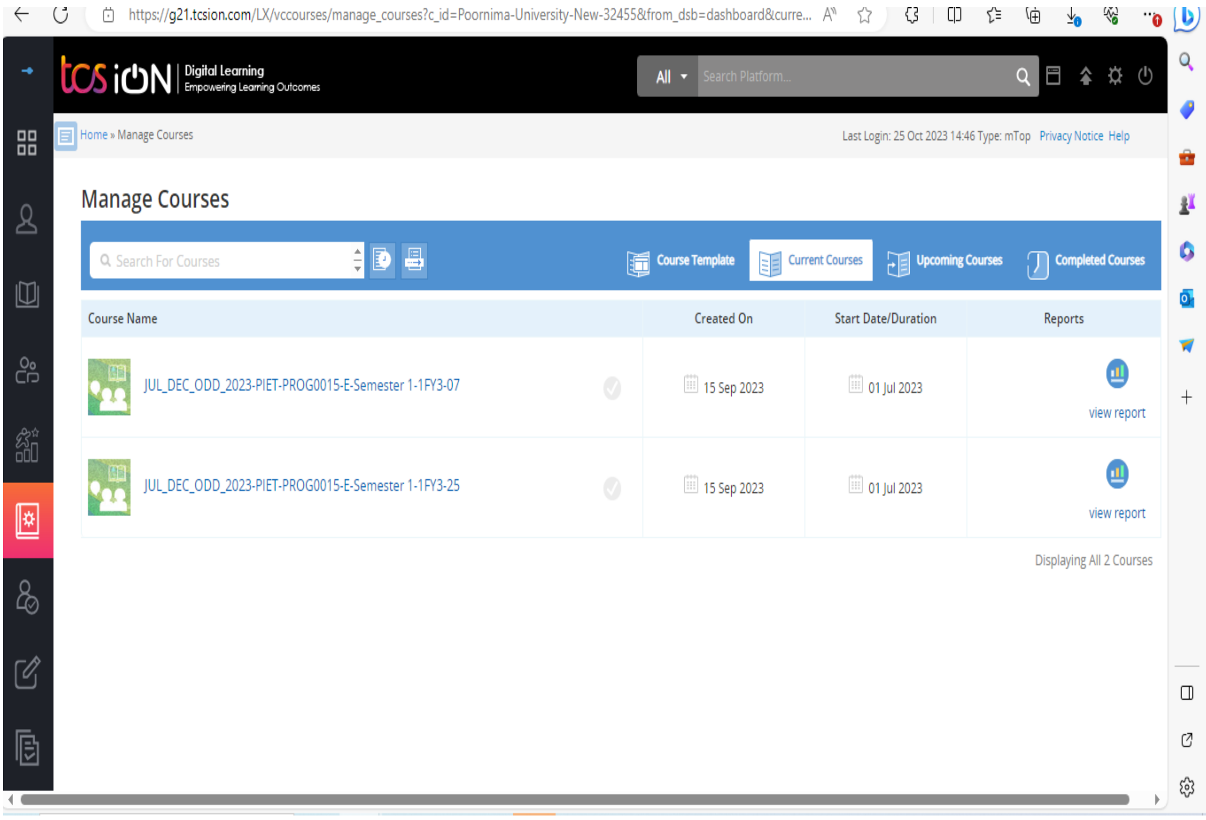
You can update content at course template level as well as course batch level. If a course template is updated with additional content, course table of contents after some course batches are created, then a course template administrator can synchronize the additional content to selected or all course batches.

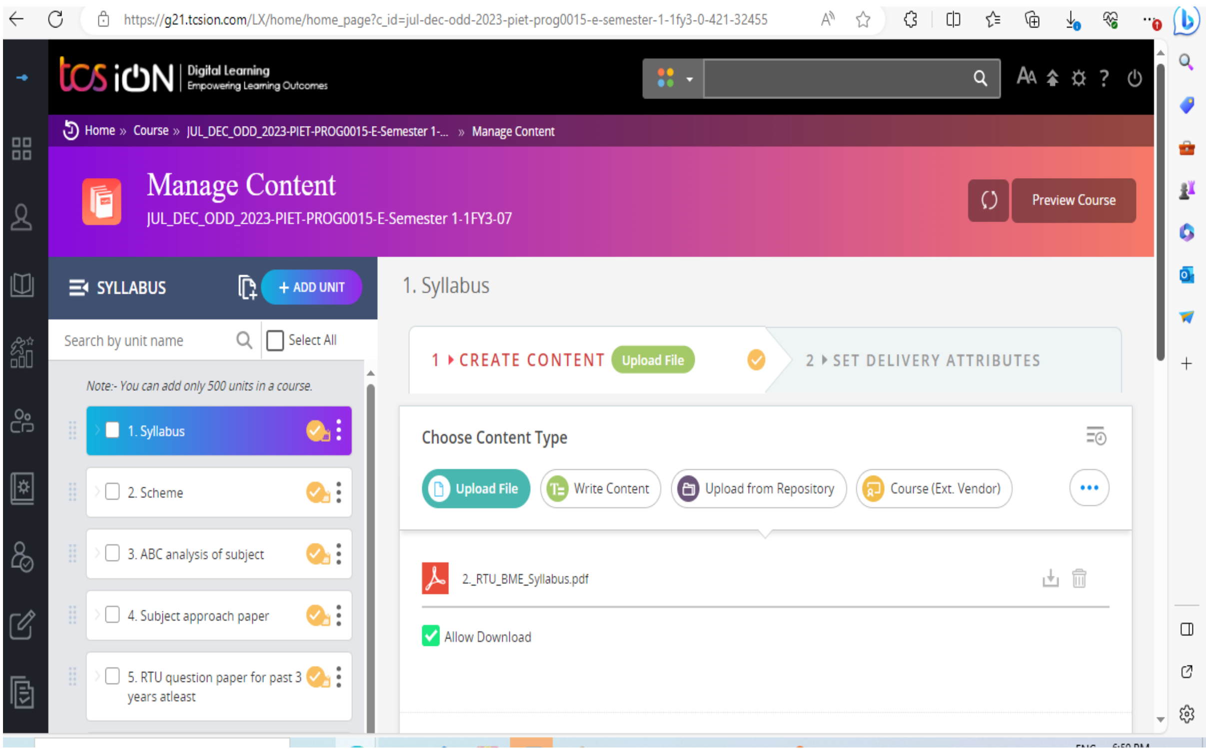
Similarly, if a course batch is updated with some additional content and the content needs to be added to course template, then a member who has both course template administrator and course batch administrator role for corresponding course batch and course template can synchronize the data to parent course template. Then the content updated in course template can be synchronized to other course batches if required.

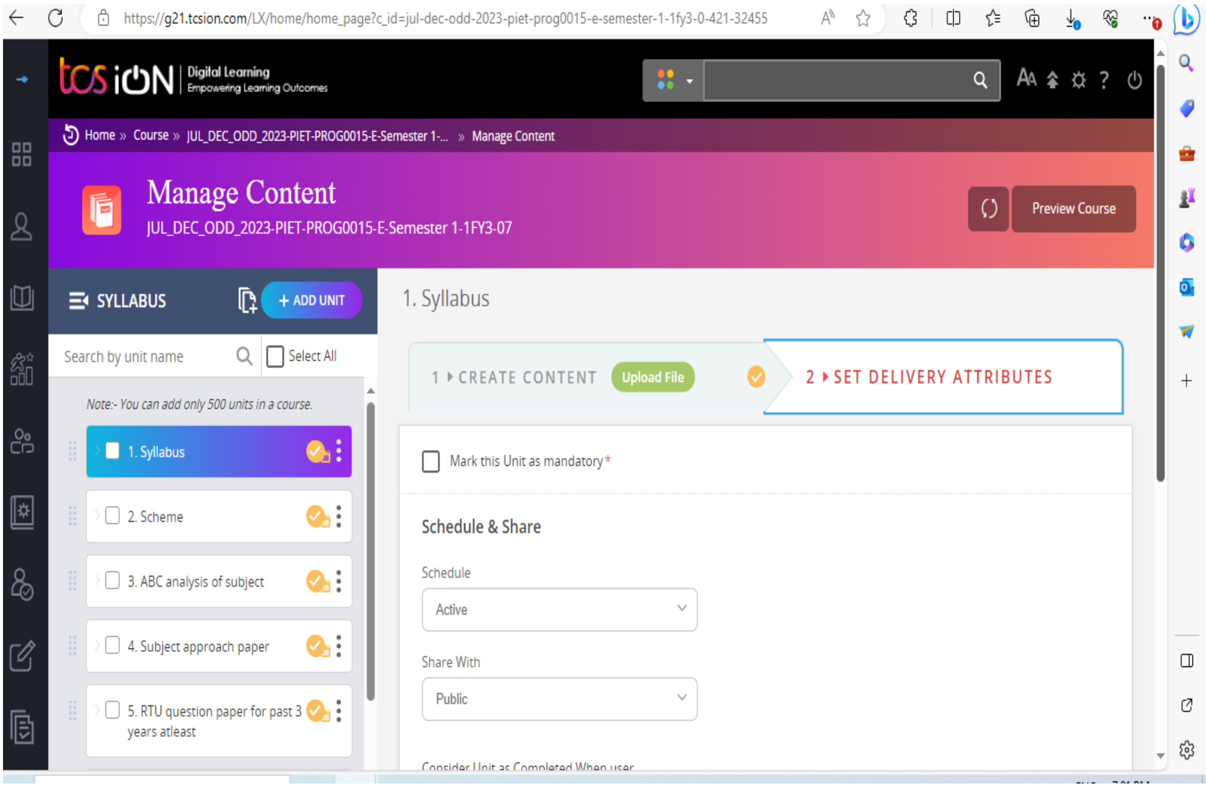
# Manage Course




https://g21.tcsion.com/LX/vccourses/manage_courses?c_id=Poornima-University-New-32455&from_dsb=dashboard&curre...
tcs iON Digital Learning
Empowering Learning Outcomes
Home » Manage Courses
Last Login: 25 Oct 2023 14:46 Type: mTop Privacy Notice Help
Manage Courses
Search For Courses
Course Template
Current Courses
Upcoming Courses
Completed Courses
Course Name
Created On
Start Date/Duration
Reports
JUL_DEC_ODD_2023-PIET-PROG0015-E-Semester 1-1FY3-07
15 Sep 2023
01 Jul 2023
view report
JUL_DEC_ODD_2023-PIET-PROG0015-E-Semester 1-1FY3-25
15 Sep 2023
01 Jul 2023
view report
Displaying All 2 Courses


https://g21.tcsion.com/LX/home/home_page?c_id=jul-dec-odd-2023-piet-prog0015-e-semester-1-1fy3-0-421-32455
tcs iON Digital Learning
Empowering Learning Outcomes
Home » Course » JUL_DEC_ODD_2023-PIET-PROG0015-E-Semester 1-... » Manage Content
Manage Content
JUL_DEC_ODD_2023-PIET-PROG0015-E-Semester 1-1FY3-07
Preview Course
SYLLABUS
+ ADD UNIT
Search by unit name
Select All
Note:- You can add only 500 units in a course.
1. Syllabus
2. Scheme
3. ABC analysis of subject
4. Subject approach paper
5. RTU question paper for past 3 years atleast
1. Syllabus
1 CREATE CONTENT Upload File
2 SET DELIVERY ATTRIBUTES
Choose Content Type
Upload File
Write Content
Upload from Repository
Course (Ext. Vendor)
2_RTU_BME_Syllabus.pdf
Allow Download


https://g21.tcsion.com/LX/home/home_page?c_id=jul-dec-odd-2023-piet-prog0015-e-semester-1-1fy3-0-421-32455
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Digital Learning
Empowering Learning Outcomes
Home » Course » JUL_DEC_ODD_2023-PIET-PROG0015-E-Semester 1-... » Manage Content
Manage Content
JUL_DEC_ODD_2023-PIET-PROG0015-E-Semester 1-1FY3-07
Preview Course
SYLLABUS
+ ADD UNIT
Search by unit name
Select All
Note:- You can add only 500 units in a course.
1. Syllabus
2. Scheme
3. ABC analysis of subject
4. Subject approach paper
5. RTU question paper for past 3 years atleast
1. Syllabus
1 CREATE CONTENT
Upload File
2 SET DELIVERY ATTRIBUTES
Mark this Unit as mandatory*
Schedule & Share
Schedule
Active
Share With
Public