CAS ERP Document



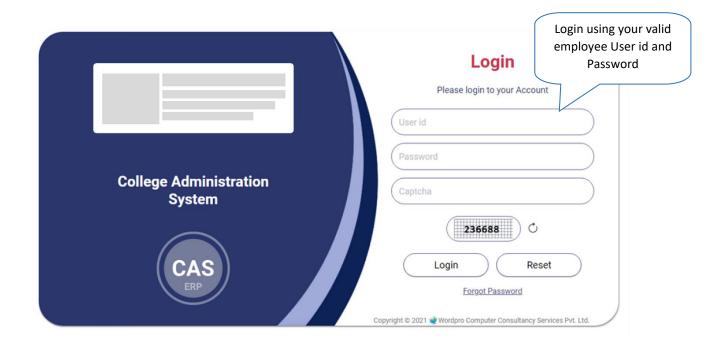
TABLE OF CONTENTS

•	Log in to the Student Portal CASERP for New Users	Pg.2
•	Understanding the Dashboard	Pg.4
	 Student Profile Details 	Pg.5
	 Notification Bell – Working Explained 	Pg.7
•	Attendance Module	
	 Purpose of the Attendance Module 	Pg. 9
	 Self Tab - Seeing the Self Attendance Report 	Pg.10
	o TimeTable Tab - Checking the Time Table	Pg.12
•	Syllabus Module	
	 Purpose of the Syllabus Module 	Pg.12
	 Subject – Checking the Subject Wise Syllabus 	Pg.13
	 Faculty – Checking the Faculty Wise Syllabus Status 	Pg.14
	 Action Plan – Checking the Teacher Teaching Action Plan 	an Pg.15
•	Fees Module	
	 Purpose of Fees Module 	Pg.16
	 Payable – Knowing Student Fees Payable 	Pg.16



Log in to the Student Portal CASERP for New Users

The **first page** of the student portal is the **login page**. Existing users can log in using a valid user id and password.



First Time Users

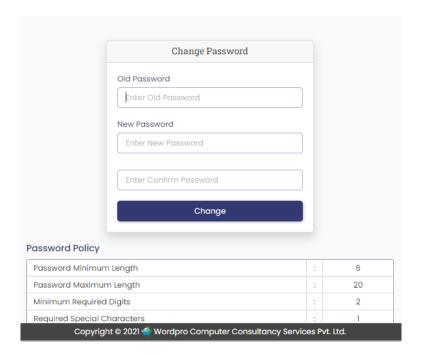
By default **user id and password are same** for those students who have come to the site for the first time.

When a new user logs in using the **same password** as the user Id a pop up tab prompting **to "Change Password"** will open. The tab also mentions the new password policy. You need to go through it before setting a new password.

Password Maximum Length Minimum Required Digits	:	20
		2
		_
Required Special Characters	:	1
Allowable Special Characters	:	!@#\$
Required lower case Characters	:	1



Your **student id is your old password**. New password should be set as per the set password policy.



Upon successful filling in the details for old and new password you will see a pop up stating "Password updated successfully".



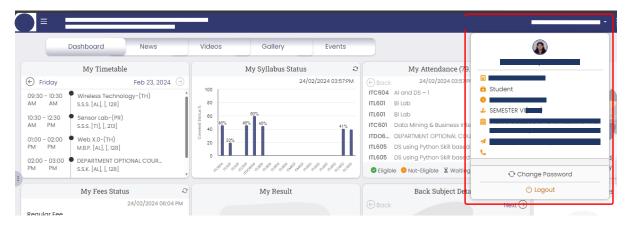
Understanding the Dashboard

On successful log in, student will be diverted to the **homepage** which is actually a **Dashboard** and gives a glimpse into all the important student related information.

Student name followed by a drop down menu is seen at the top of the page. It shows student details like Id Number, Designation, Course Code, Semester, College Name, Student Email Id and Mobile Number.

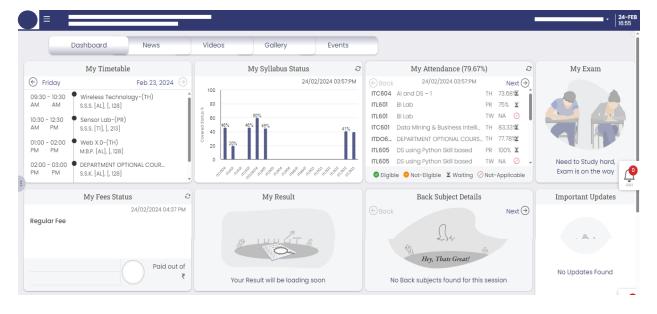


It also shows options to Change Password and Logout.



Student Profile Details

Student related information can be classified into different groups and based on these groups the dashboard is divided in to 10 smaller parts namely:





My Timetable

Shows schedule of classes, including the times, locations, and subjects for each session, providing a structured overview of academic commitments throughout the week.

My Syllabus Status

It shows the percentage of completed syllabus for all the student related subjects for the current semester.

My Attendance (percent)

It shows student's subject specific attendance percentage as well as aggregate attendance percentage for the current semester.

My Exam

Details of any upcoming exam including syllabus, allotted marks, format, duration, and allowed materials etc is shown here.

My Fees Status

Student fees details typically include information about tuition costs, additional fees such as technology or activity fees, and any financial aid or scholarship opportunities available.

My Result

Shows subject wise grades achieved, along with any additional assessment scores or performance indicators.

Back Subject Details

Shows back subject (if any) wise details including the name of the subject along with any relevant deadlines or procedures for reattempting the subjects.



Important Updates

May include updates on changes to policies, procedures, or regulations, as well as announcements about new features, services, or events that may impact students.

Today's Quiz

It can have a quiz consisting of multiple-choice questions and short-answer prompts to assess student's knowledge and understanding of the subject matter.

Weekly Survey

Shows surveys designed to gather insights from students on various aspects.

For more details on these students can view the main menu and sub menus.

One of the most important parts of the Dashboard is the **Notification Bell**. It alerts users to new activities, messages, or events, facilitating real-time engagement and communication within the platform or application. Let us understand the working of the Notification Bell through an example.

Notification Bell – Working Explained

Purpose:

Real-time Updates for all the different activities going on in a college can be seen from the Notification Bell given in the right hand side centre of the Dashboard. Different types of notifications can be seen under different heads like Success, Info, Warning, Alert and Approval.

For example:-

When a feedback request is fired from the system it shows as an alert in the Notification Bell. Here is a step by step process to access and fill in **the Feedback Forms**

Bell icon given in the right hand side centre of the Dashboard will show the **employee feedback form** as **Alerts**. Click on the Alerts and a pop up showing them opens.



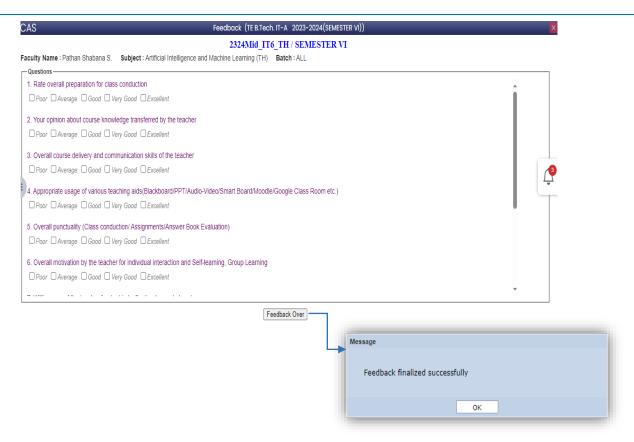


Click on the **link** and the **table** will further stretch to **show** the **feedback forms**. The form mentions the subject and professor name.



When you click on the form name, screen showing the form will open. Fill it up and click the "Feedback Over" button. It will show a pop up "Feedback Finalized Successfully".





Click Ok and a **Pending job page** as shown below will show. It is nothing but sort of dashboard showing your alerts. You can **either view your alerts from here or go to the Bell Icon**.



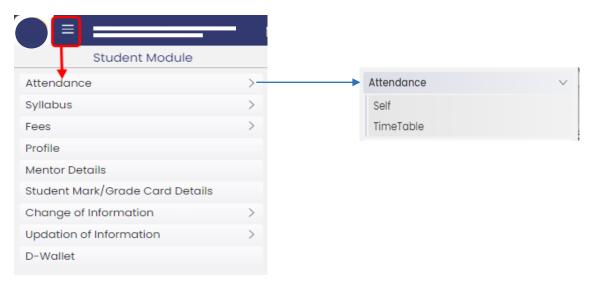
Purpose of the Attendance Tab

The attendance module allows students to check the **status of their attendance** based on the subject (applicable) and its type (theory or practical). The Time table tab shows the **weekly time table** mentioning the name of the subject, its type and classroom or hall number where it will be conducted.



How to Reach:

- ✓ Click on the main menu, the first tab you see is the attendance tab.
- Click on the attendance tab and a drop down showing the options for Self attendance and timetable will open.



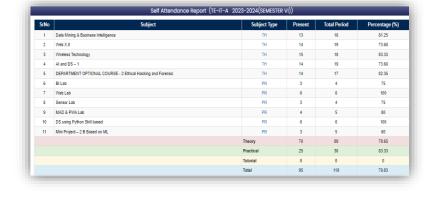
- ✓ **Self** Shows students daily attendance
- ✓ **Timetable** Shows weekly class schedule including the subject type and hall/room number.

Self Tab - Seeing the Self Attendance Report

The "self tab" from the attendance drop down menu shows student's self attendance report.

The self-attendance report typically displays **student's individual attendance record** as per the subject applicable and subject type (theory/practical). It also mentions the **class room or hall number** where the particular lecture will be conducted. It allows students to track their own attendance performance and identify areas for improvement or compliance with attendance requirements.

Student attendance is displayed through a table with columns for Sr. No., Subject (Name), Subject Type (Theory or Practical), Present (Count for number of lectures attended), Total Period (Count for number of lecture conducted) and Percentage (Calculated based on the number of classes attended against the number of classes conducted).





Click on the attendance count in the Subject Type column and a pop up showing date wise student Self Attendance Report for a particular subject related to the mentioned course and semester year will open.

Self Attendance Report (TE-IT-A 2023-2024(SEMESTER VI))				
Day Wise Attendance of Data Mining & Business Ir			elligence(Theory)	
SI. No	Date	Attendance Status	Period Type	
1	08/01/2024	PRESENT	REGULAR	
2	09/01/2024	PRESENT	REGULAR	
3	11/01/2024	ABSENT	REGULAR	
4	15/01/2024	ABSENT	REGULAR	
5	16/01/2024	PRESENT	REGULAR	
6	23/01/2024	PRESENT	REGULAR	
7	25/01/2024	PRESENT	REGULAR	
8	25/01/2024	PRESENT	EXTRA	
9	29/01/2024	PRESENT	REGULAR	
10	30/01/2024	PRESENT	REGULAR	

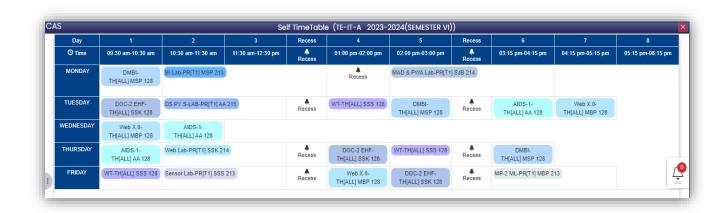


Checking the Timetable

The "Timetable tab" from the attendance drop down menu shows student's weekly timetable.

A student's weekly timetable typically displays their schedule of classes, including the courses they are enrolled in, along with the corresponding days, times, and locations of each class thereby helping students to manage their time better.

The student timetable page looks similar to the one shown below

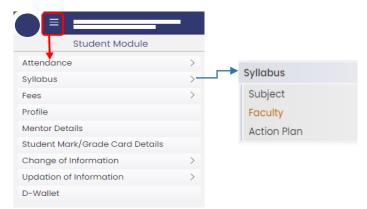


Purpose of the Syllabus Module

Student can know the status of the syllabus of all the subjects related to the course. It also shows how a particular faculty for a particular course related subject plans to complete the syllabus with details of proposed date and actual date. Further they can also know the unit wise syllabus status including the topic names, proposed date and actual date on which the syllabus was completed.

How to Reach:

- ✓ Click on the **main menu**, the S**econd tab** you see is the Syllabus tab.
- ✓ Click on the Syllabus tab and a drop down showing the options for Subject, faculty and Action Plan will open.



- Subject Shows subject wise syllabus completion status
- Faculty Shows faculty wise syllabus completion status
- Action Plan Shows Unit wise syllabus completion status by faculty



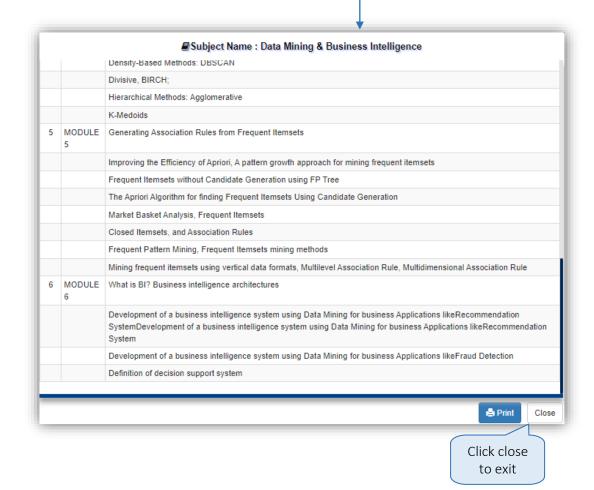
Subject - Checking the Subject Wise Syllabus

The "Subject tab" from the Syllabus drop down menu shows subject wise syllabus.

The main page for the Subject wise syllabus tab is a list of related subjects including subject type.



Click on the subject name and a pop up showing the entire syllabus for the particular subject for the current semester will open.



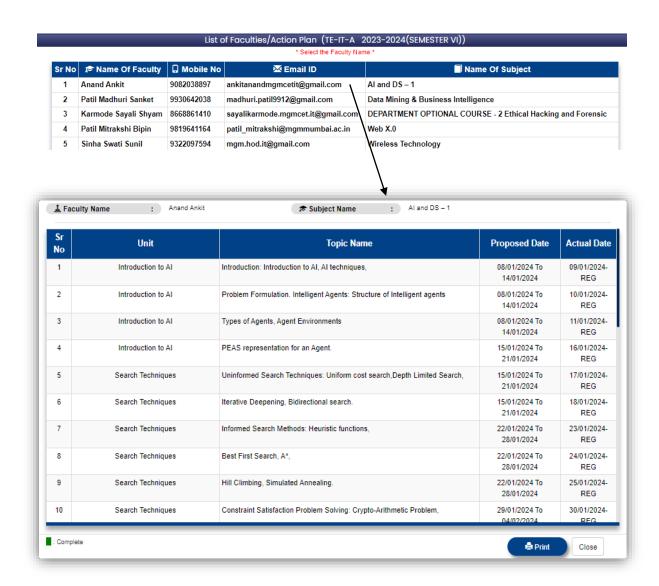


Faculty - Checking the Faculty Wise Syllabus Status

The "Faculty tab" from the Syllabus drop down menu shows Faculty wise syllabus.

The main page of the Faculty wise syllabus page is a table that shows the **details of the faculty** included Name, Mobile No., Email ID and Name of the Subject he/she teaches.

- ✓ Click on the **name of the faculty** and a pop up showing proposed date and actual date when the Unit and Topic related to the unit will be/is covered.
- ✓ Faculty Name and Subject Name are mentioned at the top of the page



The table shows **Unit** (Name of the unit), **Topic Name** (Name of the topic related to the unit), **Proposed Date** (Dates or duration between which the topic will be covered completely) and **Actual Date** (date on which the topic was covered completely).



Action Plan - Checking the Teacher Teaching Action Plan

The "Action Plan tab" from the Syllabus drop down menu shows the teacher teaching Action Plan.

- ✓ The main page of Action Plan shows **Student Name, Academic Session, Semester Name and Course Year Name** at the top of the page.
- ✓ The table shows **SrNo.**, **Name of Faculty and Name of the Subject** (taught by the faculty).
- ✓ Click on the faculty name and table showing details of the **Unit, Topic Name, Proposed Date** and **Actual Date** shows.
- ✓ Student Name, Academic Session, Semester Name, Course Year Name, Faculty Name and Subject Name (for which the table below shows information) are mentioned at the top of the page.





Purpose of the Fees Module

Student can know the financial transactions related to student fees, including tuition, registration, and other fees from the fees module. They can know their fee obligations and plan to clear outstanding fees accordingly and also act on any discrepancy observed.

How to Reach:

- ✓ Click on the main menu, the third tab you see is the Fees tab.
- ✓ Click on the Fees tab and a drop down showing the options for **Payable** will open.



Payable – Knowing Student Fees Payable

The "Payable tab" from the Fees drop down menu shows the Student fees payable details.

- ✓ The main page of Payable is a table that shows the fees details.
- ✓ The table shows Fees Type (fees heading), Particulars (Details of the fees type), Receivable Amount (amount to be paid by the student), Received Amount (Amount paid by the student), Adjustments (fees related), Outstanding (amount to be paid after adjustments) and Advance (any advance fees paid).
- ✓ **Net Total (Academic + Non Academic)** shows the final amount to be paid, paid, adjustments, outstanding and Advance.



Note:

- · Fee-receipts given by Account-section will be considered as an authenticate document.
- Discrepancy related to Payable should be communicated to Account-Section.



TABLE OF CONTENTS

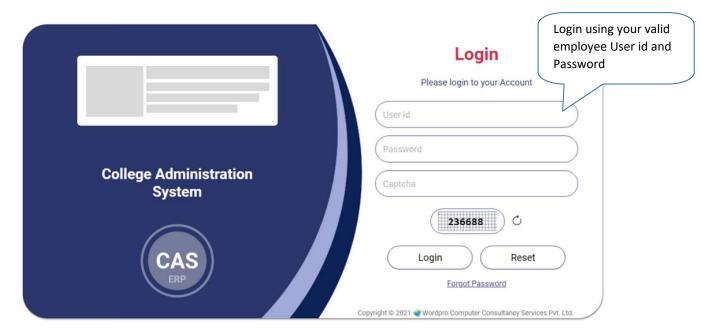
•	Log Into Employee Account	Pg.Z
•	Change of Information	Pg.6
•	Updation of Information	Pg.14
•	Lesson Planning	Pg.25
	 Understanding the Lesson Plan Page 	Pg.26
	 Understanding the From and Upto Date 	Pg.27
	 Understanding Lesson Planning 	Pg.29
	o <u>"Total Lectures Between Selected Dates Are" Field</u>	Pg.30
	 Planning the Lesson 	Pg.30
	 Lesson Plan (Day Wise) – Plan Topic for Day-wise Lectu 	res Pg.34
•	Student Attendance Marking	Pg.33
	 How to change Attendance Date 	Pg.33
	 Attendance List Page 	Pg.35
	 Top of the Attendance List 	Pg.35
	 Understanding the Table of Attendance 	Pg.37
	 Add Additional Topics 	Pg.37
	Revision of Covered Topic	Pg.38
	 Save and Save & Lock Buttons 	Pg.39
•	Syllabus Main Menu	Pg. 40
	o <u>Planned</u>	Pg.41



0 <u>A</u>	Abstract	Pg.42
o <u>C</u>	Cr Yr Wise	Pg.43
0 [Department wise	Pg.44
o <u>I</u>	N-Plan (Fact DeptWise)	Pg.45
o <u>I</u>	N-Plan (Sub DeptWise)	Pg.46
• Sche	edule Main Menu	Pg. 47
0	Time Table	Pg.48
0	Extra Time Table	Pg.48
0	Class Matrix	Pg.49
0	Cr Yr Wise	Pg.50
0	Lab Wise	Pg.51
0	Day Wise	Pg.51



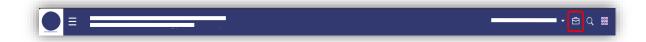
Log In to Employee Account



Each employee using the CASERP is **allotted designations** as per their duties and roles in the college. Landing page shows different portals or modules to which a **designated employee has rights**.

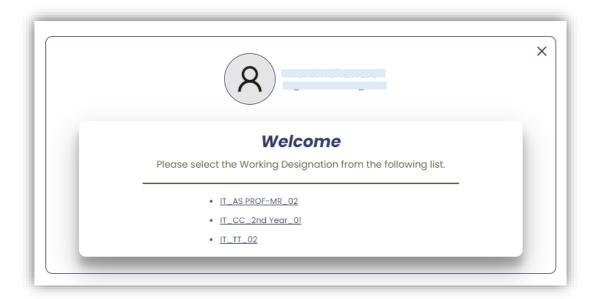


However if an employee has been **appointed to more than one Role** in the CAS-ERP then he/she will have to **first select the position** to use the rights **related** with the **position** by clicking on the briefcase icon at the top of the page.



Clicking the **briefcase icon** will open a page showing all the **various positions** to which the **employee is appointed**.

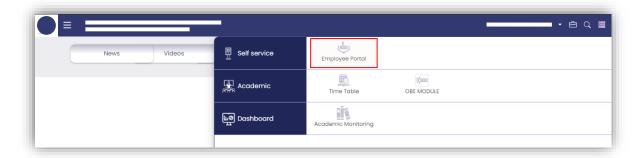




On clicking the designation a page similar to the landing page will appear however it will show different main tabs as per the employee designation selected above.

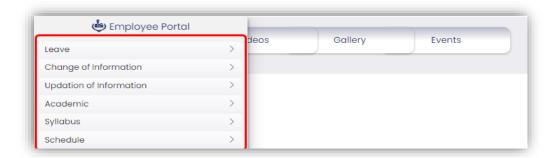


Select **Employee Portal** to view employee-related access **rights** from the home page.





Rights allocated to the particular **employee** for the different employee relatedtabs will appear on the left hand side **Employee Portal Panel**.





Change of Information

This menu can be seen in the left-hand side employee portal.

Click on the menu and a drop-down showing the details you can change will open.



o Passport

Click on the information you wish to change and their respective page from where you can make the changes will open.

Employees can change the following personal details from the "Change of Information Menu"

NameContactAddressPersonalCastePhoto

12-03-24 pg. 6

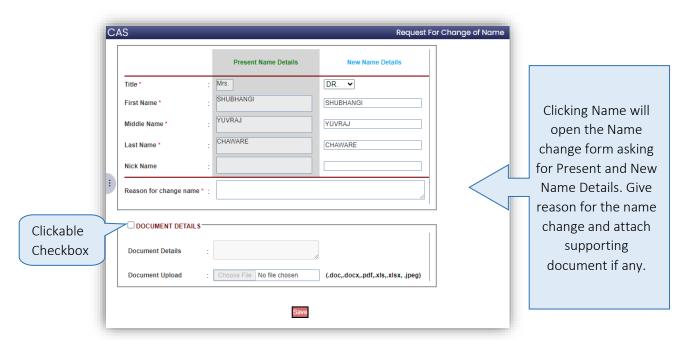


NAME

For changing the name click on the Name Tab in "Change of Information Menu"



Request for Change of Name Page Opens



- \checkmark To **upload** the document, first **Click** on the **Clickable Box**.
- ✓ Document Details and Document Upload Fields will become active.
- ✓ Enter the details of the document and select the document file to upload.
- ✓ Click the **Save Button** and the Name change process is done at your end.



ADDRESS

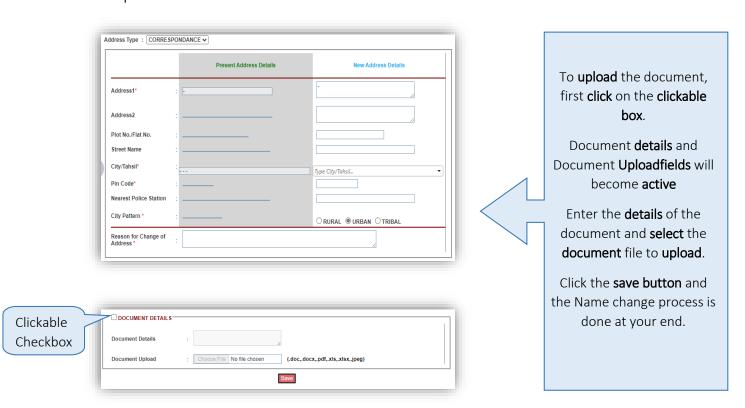
For changing the address click on the Address tab in "Change of Information Menu"



Select the **type of address** whether **correspondence or permanent** which you want to change



Address change form as shown below will open. Enter the information as asked and upload the documents.



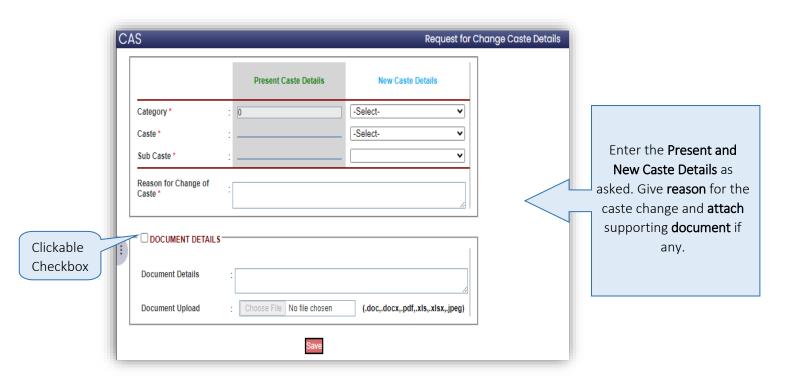


CASTE

For changing the caste click on the Caste tab in "Change of Information Menu"



Request for Change of Caste Details Page will Open



- ✓ To upload the document, first click on the clickable box.
- ✓ Document details and Document Upload fields will become active
- ✓ Enter the details of the document and select the document file to upload.
- ✓ Click the save button and the Caste change process is done at your end.

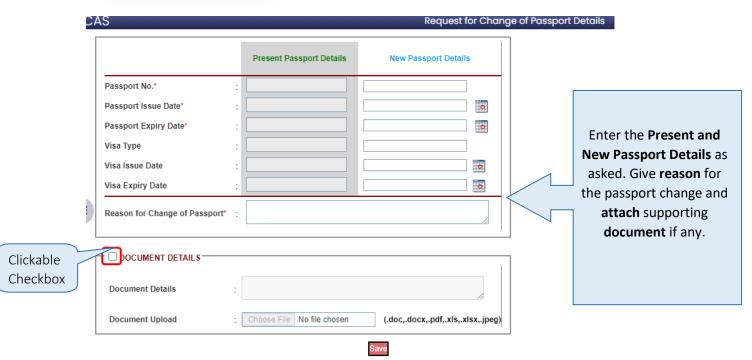


PASSPORT

For changing the Passport details click on the Passport tab in "Change of Information Menu"



Request for **Change of Passport Details** page will open



- ✓ To **upload** the document, first **click** on the **clickable box**.
- ✓ Document details and Document Upload fields will become active
- ✓ Enter the details of the document and select the document file to upload.
- ✓ Click the save button and the Passport change process is done at your end.

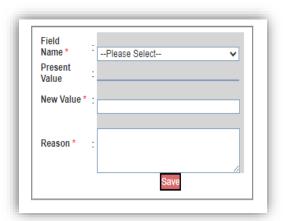


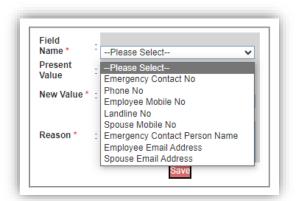
CONTACT

For changing the EmployeeContactdetails click on the Contact tab in "Change of Information Menu"

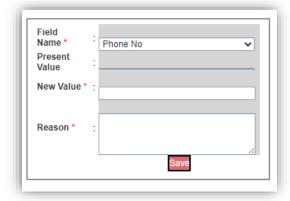


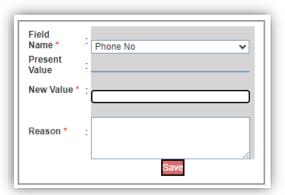
Request for **Change of Employee Contact Details** page will open





Select the employee contact details you want to change from the Field Name drop down menu





Add new details for the selected field in the New Value field and enter the reason for change.

Click the **Save button** and the Contact Details change process is done at your end.



PERSONAL

For changing the **Employee Personal details** click on the **Personal tab** in **"Change of Information Menu"**

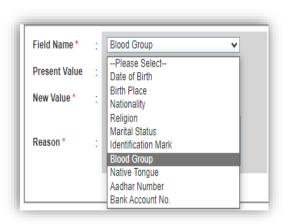


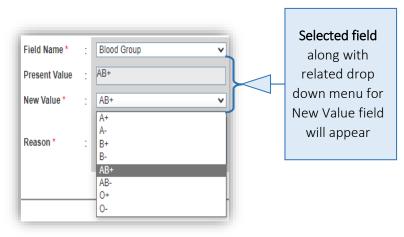
Request for **Change of Employee Personal Information Page** will open

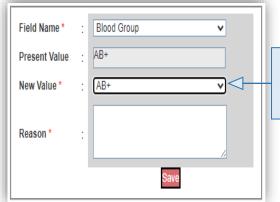


Select the Personal Information

Type details you want to change from the Field Name drop down menu







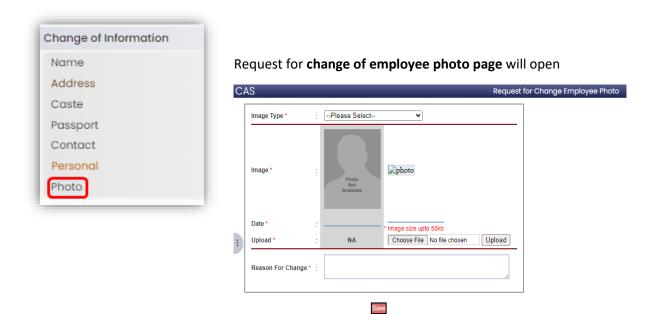
Selected new field data will show

Click the **Save button** and the Contact Details change process is done at your end.

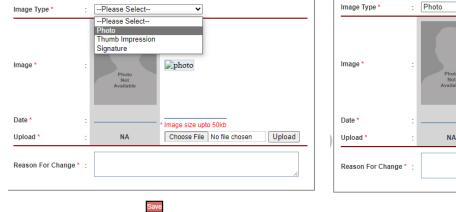


Photo

For **changing** any image related employee details like **Photo, Thumb Impression or Signature** details click on the Photo tab in **"Change of Information Menu"**



Click on the **Image Type** and a drop down menu with options **to upload Photo, Thumb Impression or Signature** will open





Whether you want to change photo, thumb impression or signature you will have to upload the relevant file.

Click the Save button and the photo change process is done at your end.

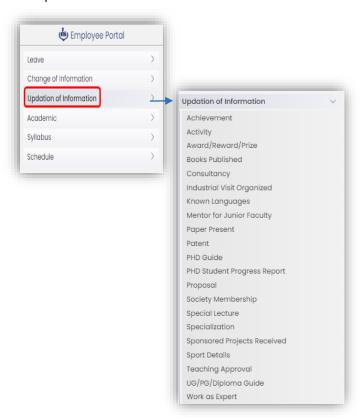


Updation of Information

The purpose of this functionality is to provide every faculty a platform through which one can update his/her self profile with their respective achievements and participations.

This menu can be seen in the **left hand side panel in employee portal.**

Click on the 'Updation of Information' menu and a drop down showing the details you can update will open.



Click on the information you wish to update and their respective page from where you can update will open

Employees can update the following details from the **"Updation of Information Menu".**

- o Achievement
- Activity
- Award/Reward/Prize
- o Books Published
- Consultancy
- o Industrial Visit Organized
- Known Languages
- Mentor for Junior Faculty
- o Paper Present
- o Patent
- O PHD Guide

- o PHD Student Progress Report
- o Proposal
- Society Membership
- o Special Lecture
- o Specialization
- Sponsored Projects Received
- o Sport Details
- Teaching Approval
- o UG/PG/Diploma Guide
- O Work as Expert



Achievement

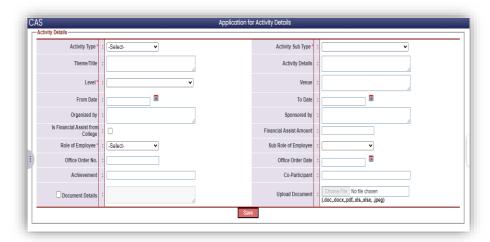
For **updating** any **Achievement** related details employee needs to fill in the details as asked for in the form shown below.



Activity

For **updating** any Activity related details employee needs to fill in the details as asked for in the form shown below.

- ✓ First, select the **main Activity Type**. Accordingly, **drop-down menus** will show for all the related fields.
- ✓ Wherever needed dates can be selected using the calendar icon.



Consultancy

For **updating** any Consultancy provided details employee needs to fill in the details as asked for in the form shown below.

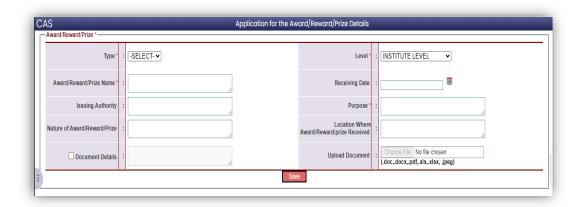




Award/Reward/Prize:

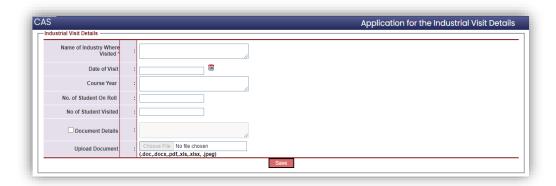
For **updating** any award/reward/prize details employee needs to fill in the details as asked for in the form shown below.

- ✓ First, select the Type. Accordingly, drop-down menus will show for all the related fields.
- ✓ Wherever needed dates can be selected using the calendar icon.



Industrial Visits Organized:

As any Faculty could arrange for an Industrial Visit on behalf of college for the students, below section provides you to fill the details regarding your contribution for the said activity.

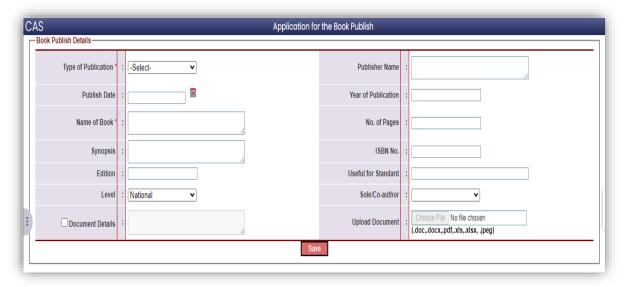




Books Published

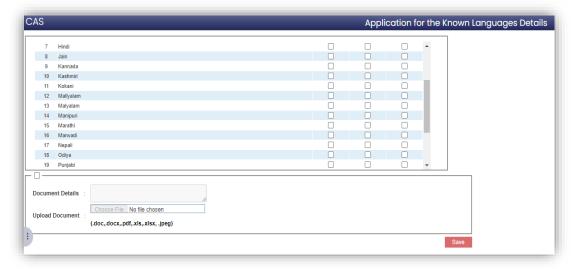
For updating books published details employee needs to fill in the details as asked for in the form shown below.

- ✓ First select the Type of Publication. Accordingly drop down menus will show for all therelated fields.
- ✓ Wherever needed dates can be selected using the calendar icon.



Known Languages

It facilitates an employee to update his / her skill towards Reading / Writing/ Speaking of a particular language or any new languages learnt in due course of Known Languages: It facilitates an employee to update his / her skill towards Reading / Writing/ Speaking of a particular language or any new languages learnt in due course of career.





PhD Student Progress Details

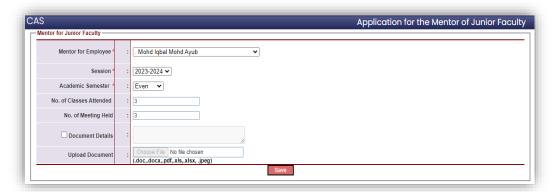
For **updating** PHD Student Progress Details a Guide needs to fill in the details as asked for in the form shown below.

- ✓ First select the Student Name from the drop down menu.
- ✓ Wherever needed dates can be selected using the calendar icon.
- ✓ Progress report can be added



Mentor to Junior Faculty

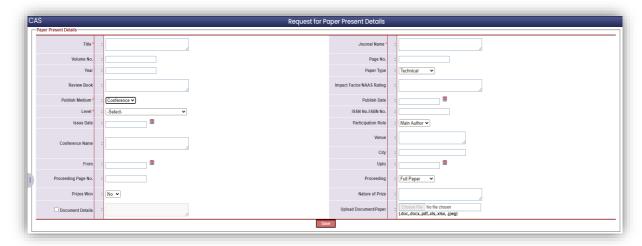
Being a senior Employee/ Faulty member if you have been mentoring your subordinate Faculty members then such details about mentoring activities can be update into once profile as given below.





Paper Presented

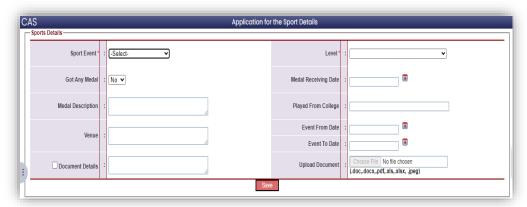
Being an academic faculty member and into the Technical and research field it is very common to being participated in Paper Presentations for Conferences / Journals, to update one's such presentation details below is a detailed window to update the selfspecific information.



Sport Details

For **updating** Sports Details employee needs to fill in the details as asked for in the form shown below.

- ✓ First select the Sport Event from the drop down menu. Accordingly drop down menus will show for all the related fields.
- ✓ Wherever needed dates can be selected using the calendar icon.





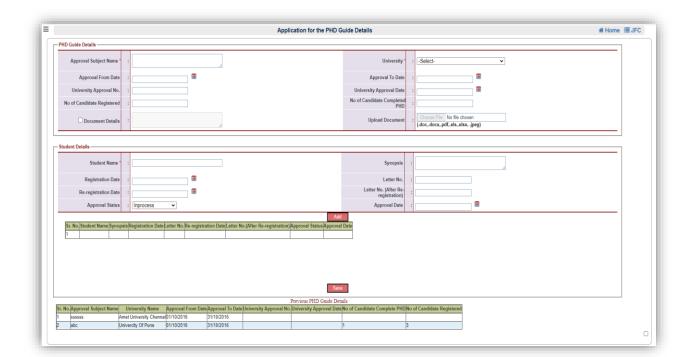
Patent

Being an academic faculty member and into the Technical and research field a faculty can be definitely involved with research activities and patenting of the same. To upload such milestones into self-profile book one can update these information into the ERP through the below menu.



PhD. Guide

If any Faculty is a PhD guide to Students then the entire record can be updated and maintained through the below facility.

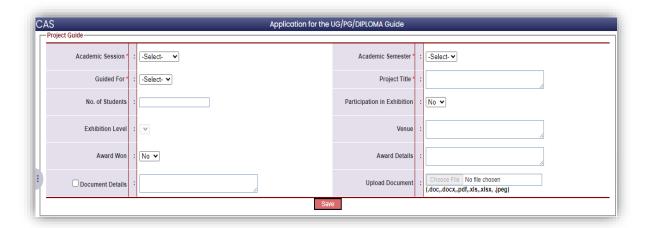




UG/PG/Diploma Guide

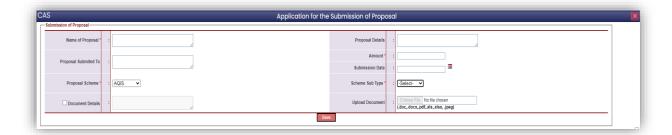
For updating UG/PG/Diploma details employee needs to fill in the details as asked for in the form shown below.

✓ First select the Academic Session from the drop down menu. Accordingly drop down menus will show for all the related fields.



Proposals

An Employee can update proposal details referring to the functionality given below.





Work As Expert

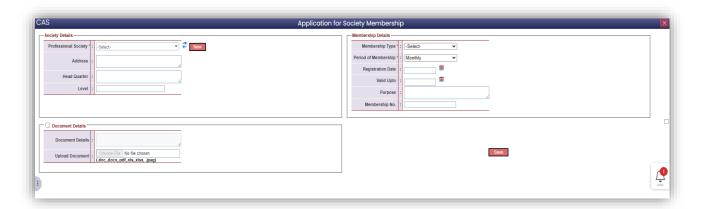
For **updating** Work as Expert details employee needs to fill in the details asked for in the form shown below.

- ✓ First select the **Activity Type**from the drop down menu. Accordingly **drop down menus** will show for all the related fields.
- ✓ Wherever needed datescan be selected using the calendaricon



Society Membership

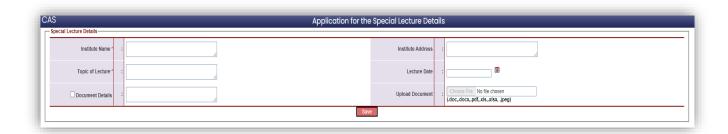
As an academic Faculty, an Employee can be associated with many Technical/ Academic Societies thus their membership details could be captured through the below described window.





Special Lecture

As an academician many a times invitations are received from different departments/ organizations for delivering special lecture sessions which also adds up to an achievement feather over the cap, to get these details updated into one's self profile a Faculty can use the below window and update such information.



Specialization

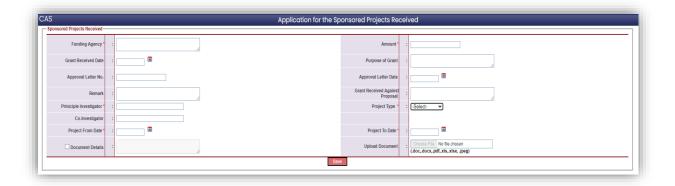
As an academic Faculty, an employee can update his/ her subject/ topic specialization details as mentioned below.





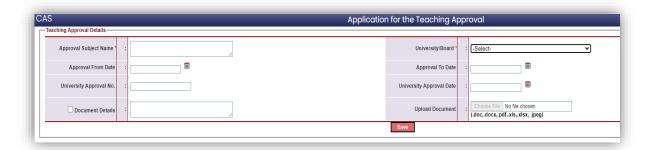
Sponsored Projects Received

As the academicians also get engaged into project consultancies and activities and undertake various projects under sponsorships, to update the details the below given functionality can be utilized.



Teaching Approvals

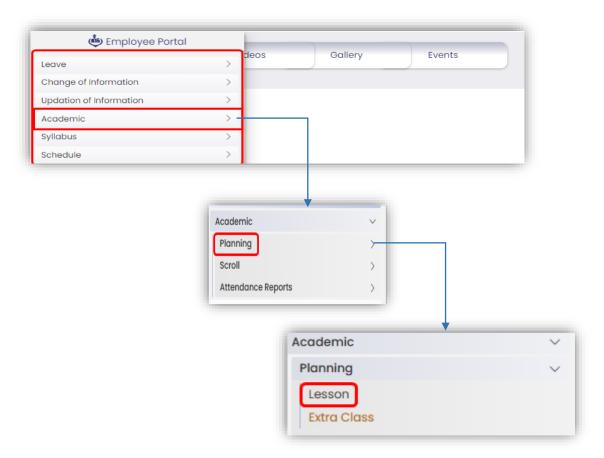
As the Teaching Faculties as an employee receives Teaching approval from Statutory bodies, thus the same details can also be updated into the profile by filling up the required details in the below given form.



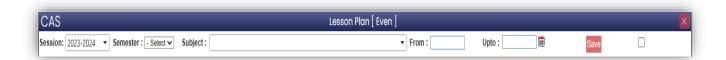


Lesson Planning

Click on the **Academic tab** from the Employee Portal and it will show you options for Planning, Scroll and Attendance Reports



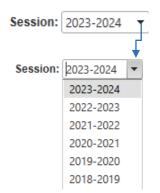
- ✓ Click on planning and a scroll-down menu with options for Lesson and Extra Class will Open
- ✓ Click on Lesson and a Lesson Plan Page will open





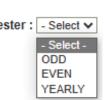
Understanding the Lesson Plan Page

This page allows you to see and plan lectures based on the session, semester and subject selected from the drop down menus.

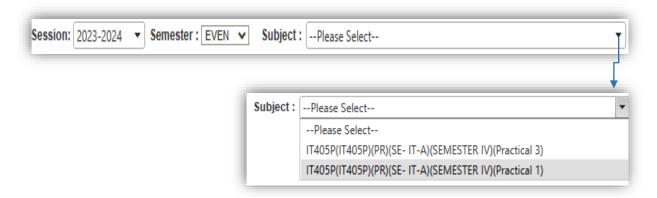


Session refers to the college session. Click on the **drop down** and you will see **options to select the year.**

After selecting the session you need to select the Semester from the drop down menu. It gives you the option to select ODD, EVEN or YEARLYtype of semester.



Based on your session and semester Time Table you will get the options to select the Subject from the drop down menu.



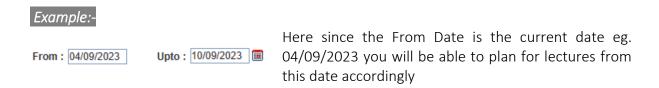
You need to **click** on the **name of the subject** for which you **want to do lesson planning**. you will **see Lesson Plan as below**. Note that the **From and Upto Date fields** are updated.





Understanding the From and Upto Date

From Date and Upto Date represent the duration for which you can plan the lectures, like here you can plan lecturesfor a week/ a month/ entire semester span from the From Date.

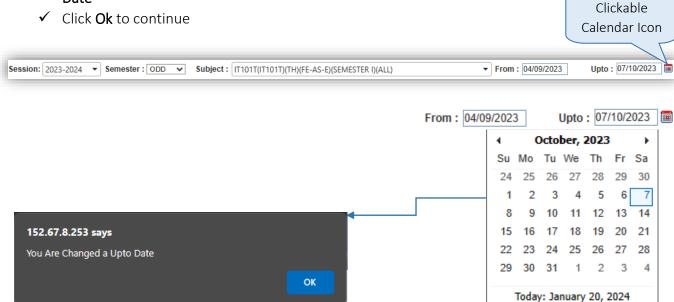


Change the Upto Date

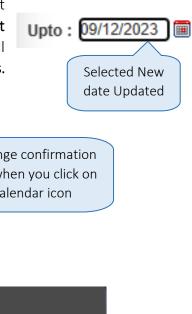
While it does not give you the option to change the From Date you can change the Upto Date, but the duration between the From Date and Upto Date should not be more than semester end date. If it is more than that, it will show a validation message.



- ✓ Click on the Calendar icon you see next to the Upto Date Box
- ✓ Calendar will open. Select the date as per your requirement.
- ✓ When you select the date it will show a message asking "You Are Changing Upto Date"



- ✓ Selected **new date** can be seen in the **Upto Date field**.
- ✓ If the selected date is more than semester end date then it will show a validation message stating "You Cannot Select Time Span of More than semester end date". Also it will show the new date selected but will not let you plan lectures.





Duration is more than 4 weeks, Validation message shows, yet Upto Date will show the new

152.67.8.253 says

You can not select time span more than 4 weeks

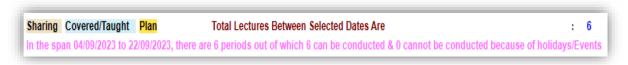
OK



Understanding Lesson Planning

After selecting the session, semester, subject, from and upto date, lesson planning can be done in the Syllabus List table which has columns for Select, Unit No., Unit Name, Topic Description, No. of Lecture, Start Date, End Date and Remark. You will also notice that some of the rows are highlighted.

Different highlighted colours are used to show the status of the lecture like Sharing, Covered/Taught and Plan



- ✓ Orange highlight means that two or more lecturers will cover the topic, meaning some part of the topic will be covered by other lecturer/s.
- ✓ Blue highlight means the lesson is taught and covered
- ✓ Yellow Highlight means the lessons are planned

Therefore when you see rows highlighted in blue it will mean that topic is taught/covered. Similarly if the highlightis yellow it will mean the topic is planned to be taken up in upcoming lectures.

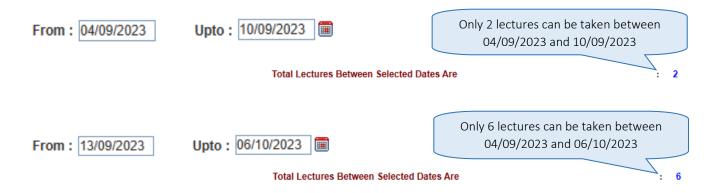




Understanding – "Total Lectures Between Selected Dates Are" Field

First it is important to know that the fields for From Date, Upto Date and Total Lectures Between Selected Dates Are interrelated, change in one can result in change in other. "Total Lectures Between Selected Dates Are" refers to the number of classes that will be conducted for the subject during the period that has been selected in the From Date and Upto Date fields as seen at the top of the page.

As the Upto Date changes the total lectures between the selected dates also changes, meaning during those selected dates only that many lectures can be taken for the subject as are mentioned in this field. Simply put if you will change the "Upto Date" it will also change the number mentioned in "Total Lectures between selected Dates are "field.

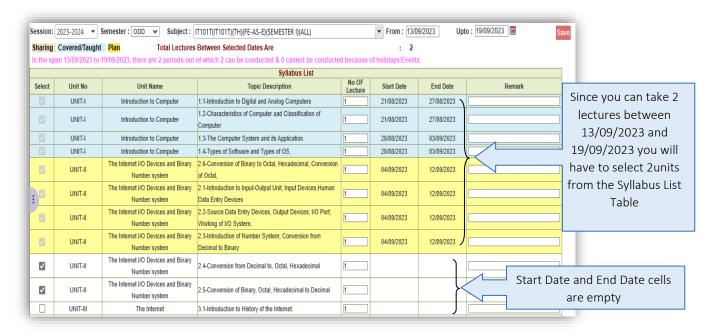


Planning the Lesson

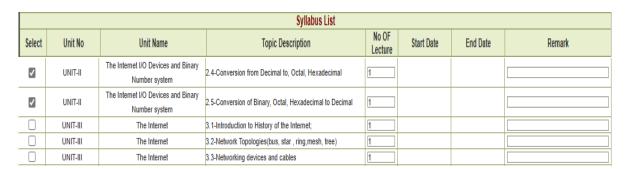
After selecting the Upto Date you will get the number of lectures you can take between the selected dates. You will then select those many lectures from the Syllabus List Table. Also the number of lectures selected from the Syllabus List Table should be equal to the number of lectures mentioned in the "Total Lectures Between Selected Dates Are" field.

The Syllabus List table has columns for Select, Unit no, Unit Name, Topic Description, No of Lecture, Start Date, End Date, and Remark. Note that the cells for Start Date and End Date are empty.





To **select a unit** simply **click** on the **clickable box given** in the **Select Column next** to the **unit** you want to plan the lecture for



After selecting the units you plan to take in the upcoming lectures click on the Save button given at the top of the Lesson Plan Page



Clicking Save Button will open a Pop Up asking "Do you really want to continue". Click Ok to continue. Cancel will take you back to the Lesson Plan page.

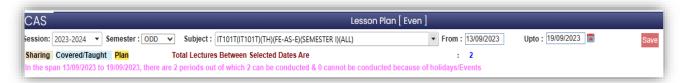


Clicking Ok will open a pop up confirming that "Record Saved Successfully".





After selecting the units you plan to take in the upcoming lectures click on the Save button given at the top of the Lesson Plan Page



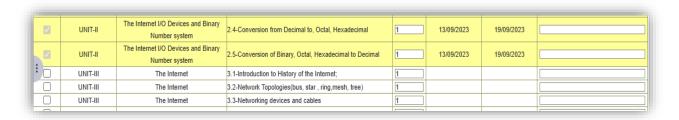
Clicking Save Button will open a Pop Up asking "Do you really want to continue". Click Ok to continue. Cancel will take you back to the Lesson Plan page.



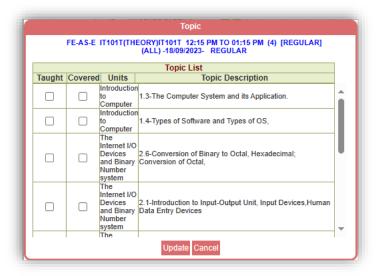
Clicking Ok will open a pop up confirming that "Record Saved Successfully".



Clicking Ok will take you back to the Lesson Plan Page. The 2 units you had selected to complete in the upcoming lectures will be now highlighted in Yellow.



Your Lesson Planning task is accomplished here. The units you selected as a plan will show in the pop-up window that opens on clicking the box next to Taught in the topics section on the attendance list page at the bottom.



Note:-

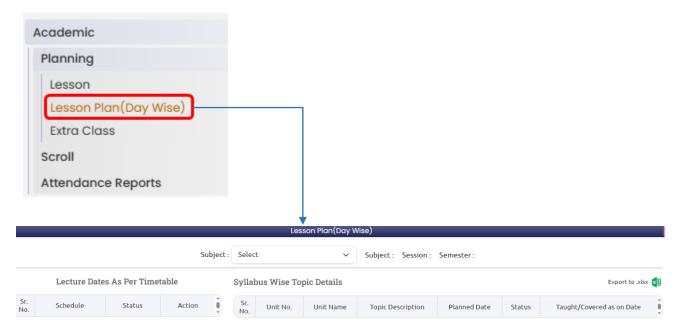
The status marked for the topics here will show in the Topics Section on the Attendance List Page. If a topic is not selected and planned here but the lecturer wants to teach it then he/she will first have to plan it here that is in the Lesson Planner.



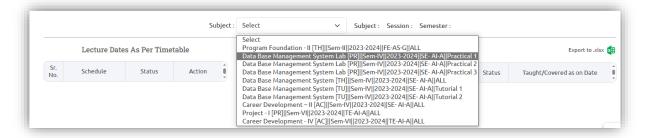
Lesson Plan (Day Wise) - Plan Topic for Day-wise Lectures

Purpose: Lesson plan (day wise) allows lecturers to **plan ahead the topic** they wish to cover for their lectures during a week for **all or some of the upcoming lectures** for the semester. It serves as a guide for both the lecturers and the students to prepare for the planned lectures resulting in effective time management.

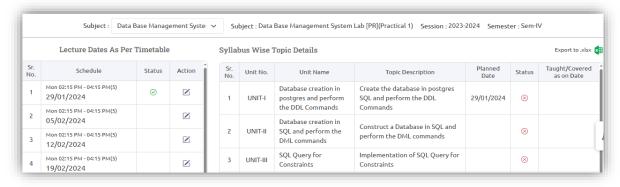
Lesson Plan (Day Wise) is a **sub type** under the **Academic module** (CASERP) **Planning tab**. Upon clicking a page as shown below appears.



Select the subject for which planning is to be done from the subject drop down menu

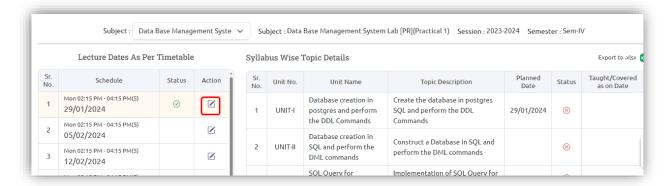


Both the "Lecture Dates as Per Timetable Table" and the "Syllabus Wise Topics Details Table" will show details for the selected subject.

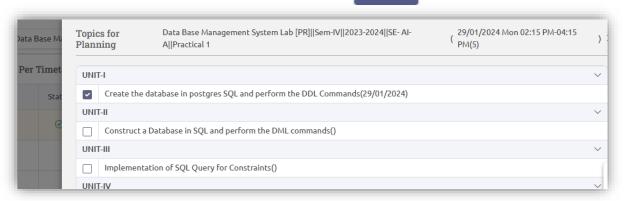




Click on the **scheduled lecture** to which you want to allot a topic from the **Schedule column in** the Lecture Dates As Per Timetable table

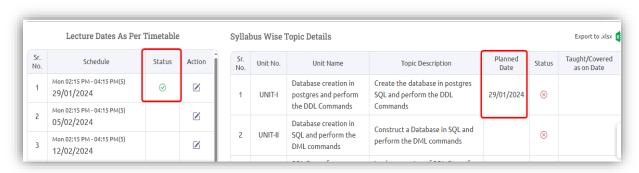


Screen showing the **list of topics** related to all the unit will slide. Tick on the **topic** you wish to teach and click the **update button** at the bottom of the page.



The topic will then **get allotted** and the **status column** in the "Lecture Dates As Per Timetable" table will show a **green tick**. The **planned date column** in the "Syllabus Wise Topic Details" will show the date on which the lecture was planned.

Data Interpretation



Topic to be taught for the lecture on Monday from 2:15 PM to 4:15 PM is assigned



When the **attendance** is **marked** by the lecturer for the particular lecture as planned from this page the attendance column will show the **lock symbol**.

Many times other **lecturer** is **engaged** to give a class in place of the lecturer who was supposed to take the particular lecture then **(Eng)** will be written next to that particular lecture details.

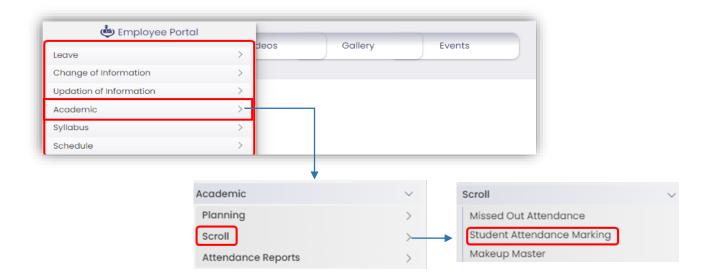
Sr. Schedule Status Action No. Tue 10:00 AM - 11:00 AM(2) 1 \odot Z 23/01/2024 Attendance marked Wed 11:15 AM - 12:15 PM(3) 2 ❷ 24/01/2024 Fri 10:00 AM - 11:00 AM(2) 3 26/01/2024 Tue 10:00 AM - 11:00 AM(2) 4 30/01/2024 (Eng) Wed 11:15 AM - 12:15 PM 5 31/01/2024 (Eng) Another lecturer engaged

Lecture Dates As Per Timetable



Student Attendance Marking

Click on the Academic tab from the left hand side menu and it will show you options for Planning, Scroll and Attendance Reports.



Click Scroll and it will open the scroll down menu for Missed out Attendance, Student Attendance Marking and Makeup Master, out of these, click on Student Attendance Marking.

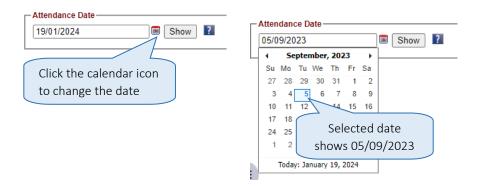
Student Attendance Marking

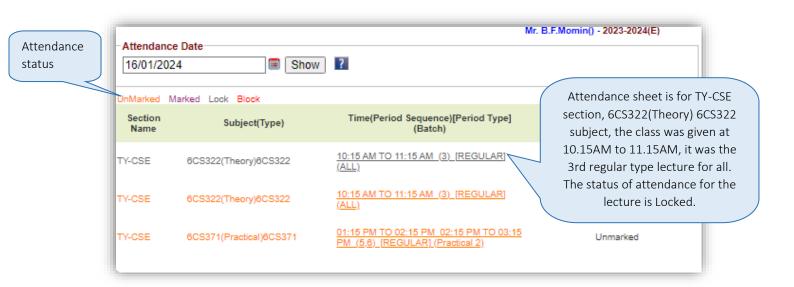


How to change Attendance Date

- ✓ For attendance marking select the date for which you want to mark the attendance
- ✓ Attendance date by default shows the current date
- ✓ You can change the date by clicking on the Calendar icon
- ✓ Calendar will open.
- ✓ You can select the month and date From the calendar simply select the date and it will show the selected date in the Attendance date box.
- ✓ Click on the "Show" button and it will open a table showing details of the lectures scheduled (regular/ extra/ engaged lectures) on that particular day.







The table shows details of the lecture conducted on that particular day. Details include Section Name, Subject (Type), Time (Period Sequence) (Period Type) (Batch) and Status of the attendance whether Un-Marked, Marked, Lock and Block.

Un-Marked means Attendance is not marked yet and one can update it.

Marked means Attendance is marked

Lock means Attendance is Saved and Locked

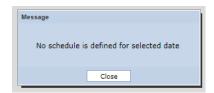
Block means Attendance Sheet is blocked, cannot be opened and you will need special permission to open it.



Click on the hyperlink in the table and it will open detailed attendance list page.



However if it is a holiday on the selected day or lecture scheduled for that day then you will see the screen stating "No schedule is defined for selected date"

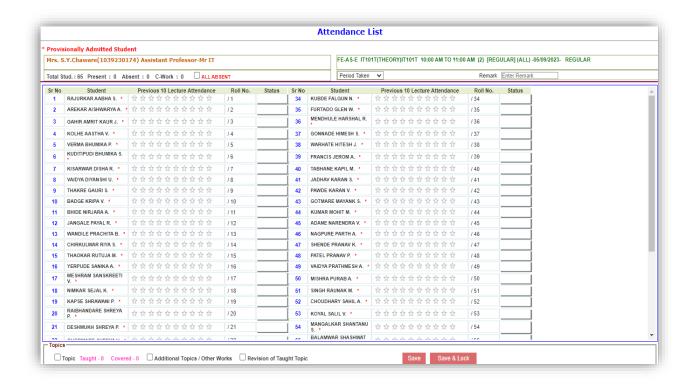


Note:-

Lecturers can see attendance details only for back/ Current date lectures and not for a future date

Attendance List Page

Attendance List shows a lot of information. Let us understand the different details mentioned here through a detailed user manual



Top of the Attendance List

* Provisionally Admitted Student

Mr. B.F.Momin(1039196002) Associate Professor CSE

Total Stud.: 120 Present: 0 Absent: 0 C-Work: 0 ALL ABSENT

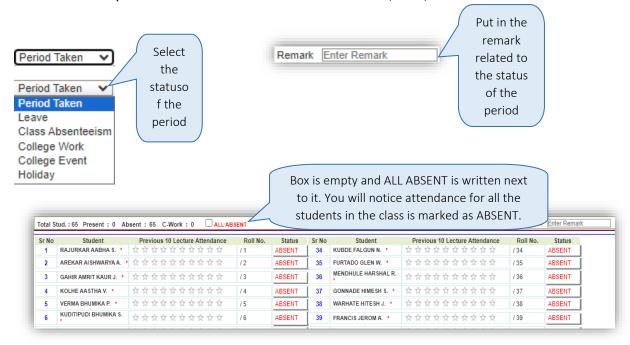
Tricse 6C S322(Theory)6C S322 10:15 AM TO 11:15 AM -15/01/2024- REGULAR

Period Taken PROMAIN Enter Remark



- ✓ Details related to the lecturer like name of the lecturer, employee code, and designation is shown in the first box.
- ✓ Next box shows more information about the course like section, subject, class timing and lecture type.
- ✓ Under it is a box showing total number of students, no of students present, no of students absent and number of students in C-Work. The numbers for each of these attendance fields is auto adjusted based on the attendance marked by the lecturer.
- ✓ **Next** to the **C-Work count** is a box that □ **ALL ABSENT** allows you to mark attendance of all the students of the class at a time either as (Present/ Absent).

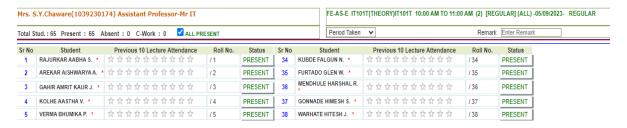
A Lecturer has to first give the status that whether he/ she has taken the period or not, accordingly it is to be selected from the list here as a **drop down menu** and gives you the option to select either **Period taken or (reasons for period not taken)** Leave, Class Absenteeism, College Work, College Event and Holiday. Lecturer can select the option based on whether the period was taken or not and if not then why the period was not taken.



Similarly in the image as shown below you will notice that the earlier empty box is now clicked and All Present is written next to it. Attendance for all the students gets marked as present and shown in Green color.

Box has a blue tick and All PRESENT is written next to it. You will notice attendance for all the students in the class is marked as ABSENT

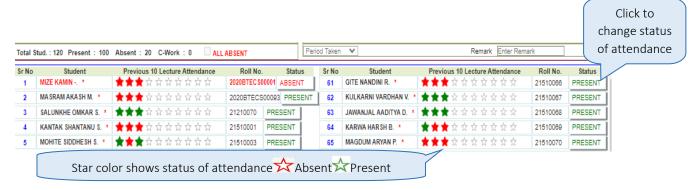




Understanding the Table of Attendance

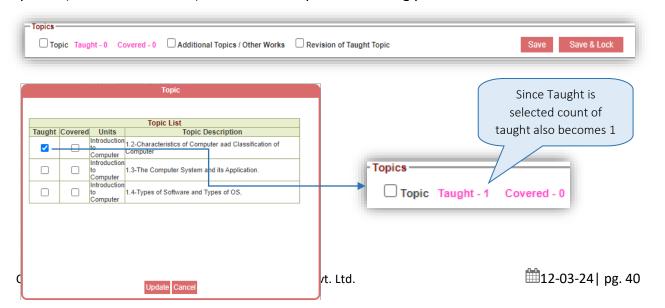
Centre of the page is the Table of Student's Attendance in which lecturer can mark student attendance and while updating can view the attendance for the previous 10 lectures. Simply click on the box next to the name of the student and the status of attendance changes from Absent to C-Work and Present. As the status of the attendance changes for the student, the student counts for present, absent and C-work will also change.

Stars next to the name of the student are color coded. While a Green Star would mean Present a Red Star would mean Absent. Name of the absent student is also mentioned in Red ink. This makes it easy to know student attendance for the previous 10 lectures at a glance.



Topics Section

Towards the bottom of the Attendance List page is the Topics section. Here you can select the topic that was taught, covered, additional topics/other works involved and revision of taught topic. As you click on the box you will see the options accordingly.





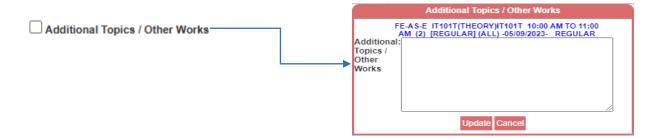
- ✓ You will tick "Taught" for topics which are started but not covered.
- ✓ You will tick on "Covered" if you have covered it
- ✓ Ticking "Covered" will also tick "Taught" you can only cover a topic you have taught.
- ✓ Click Update after ticking the appropriate options
- ✓ Accordingly Status of the topics will update as per the options ticked in the pop up box
- ✓ Clicking Cancel will take you back to the Attendance List Page.

Note:-

You will be able to see topics in the pop up box when you click on taught or any other option only if you would have planned the same in the Lesson Planner.

Add Additional Topics

If you wish to take some additional topic beyond the syllabus then you need to click on the Empty box next to the Additional Topics. Pop up Text box as shown below opens. Simply type the title of the topic you have covered in the box and click update



Revision of a Covered Topic

Lastly if you wish to take revision on a certain topic you need to click on the box given next to the "Revision of Taught Topic". Clicking on the box, will open a pop up showing the topics you have already covered previously. Out of the topic displayed you can simply tick on the topic you

wish to take up for revision and then click update.



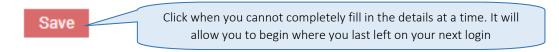




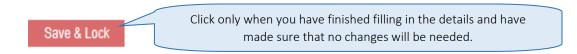
Clicking Cancel will take you back to the Attendance List page

Save and Save & Lock Buttons

- ✓ At the end you will see the 'Save' and 'Save & Lock' buttons.
- ✓ Click the Save button when due to some reason you cannot completely fill in the attendance details on the Attendance List page.
- ✓ Next time when you will log in, you can begin from where you last left.



- ✓ However if you have **completely filled** the **details** asked for in the Attendance List page you can click on the **Save & Lock** button.
- ✓ It will finally save the details filled in and will not allow you to edit them at a later stage.
- ✓ Only upon clicking on 'Save & Lock' the attendance data gets reflected into reports as it's the final submission report.



Clicking the Save and Lock button will show a pop up stating "Record Saved Successfully".Click Ok and you will be taken back to the main Attendance Marking page, where you begin with selecting the date.





You can **select date** to view and check the attendance details for the selected date.



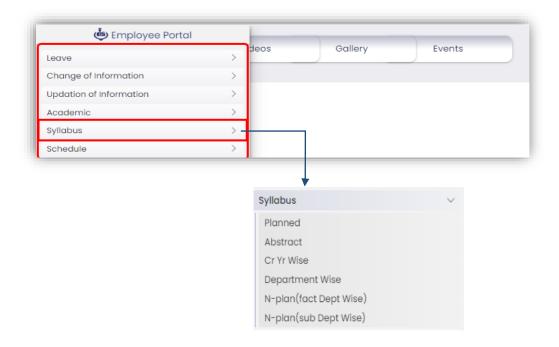
Syllabus Main Menu

Purpose :

It generates reports showing the syllabus status whether planned, covered, covered-in process, not planned related to the subject/ faculty or department.

This menu can be seen in the left hand side employee portal.

Click on the Syllabus menu in the Employee Portal



Drop down will show the options to view the following reports

- o Planned(topics covered, not covered, covered in progress and not proposed),
- Abstract(shows syllabus status in percentage)
- o **Cr Yr Wise**(course year wise)
- o **Department wise** Syllabus covered department wise
- o N-Plan (fact dept wise) (not planned faculty and department wise)
- o N-Plan (sub dept wise) (subject and department wise)



Planned

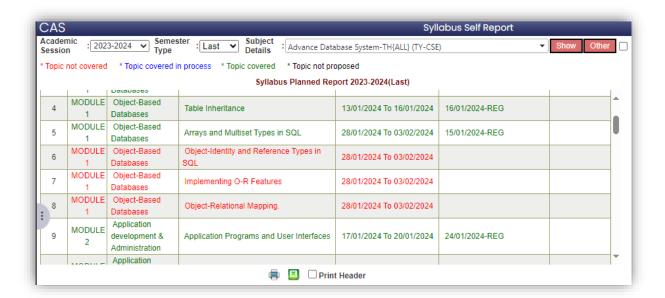
Employee can see the **detailed status** of the **syllabus planned** for the **current session** and selected **semester** for a particular **subject** including Unit No, Unit (name of the unit), Topic Names, Proposed Date (duration to cover the planned syllabus), Actual Covered Date (actual date on which the syllabus was covered) and Remark (related to the subject or its status).

- ✓ Click on the **Planned tab** in the Syllabus main menu and the **Form** as seen below will **open**
- ✓ Select the centre, session, semester and department for which you want to see the planned syllabus status.



Clicking the Show Button will populate the Syllabus Planned Report for the selected academic session and semester.

Planned topics whether **not covered, covered in process, covered and topics not proposed** are shown through color coded text.





Abstract

Employees can know the **percentage of syllabus** actually covered and covered based on the number of topics to be covered and actually covered.

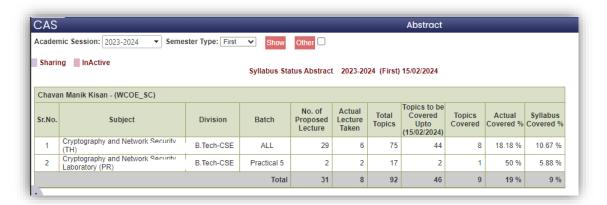
- ✓ Click on the **Abstract tab** in the Syllabus main menu and the Form as seen below will **open**
- ✓ Select **the academic session and type** for which you want to see the abstract syllabus status.



- ✓ Clicking the show button will populate the Syllabus Status Abstract Report based on the Academic year and the semester selected.
- ✓ Percentage of syllabus actually covered and the syllabus covered can be known from the report.

Here,

- ✓ Actual covered percentage is calculated based on topics covered out of the topics to be covered.
- ✓ **Syllabus covered percentage** is calculated based on the topics covered out of the total topics to be **covered**.





Cr Yr Wise

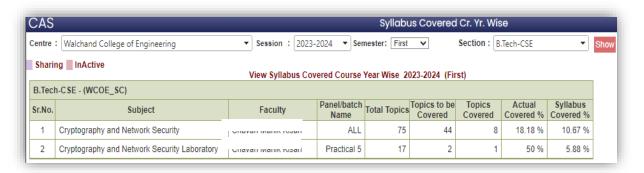
Employees can know the **course year wise syllabus covered by them** both in terms of numbers and as a percentage for the selected centre, session, semester and section.

- ✓ Click on the **Cr Yr Wise** in the Syllabus main menu and the **Form** as seen below will **open**
- ✓ Select **the Centre, Session Year, Semester and Section** for which you want to see the syllabus status.
- ✓ Clicking the show button will populate the Syllabus Covered Course Year Wise Report for the faculty (lecturer) based on the form selections made.



Here,

✓ Actual covered percentage is calculated based on topics covered out of the topics to



be covered.

✓ **Syllabus covered percentage** is calculated based on the topics covered out of the total topics to be covered.



Department wise

Syllabus covered both in **numbers and percentage** according to the **department based** on the Centre, Session, Semester and Department can be seen from the Department wise sub menu.

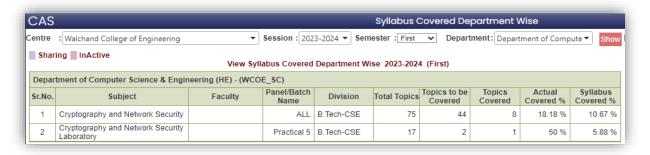
- ✓ Click on the **Department wise tab** in the Syllabus main menu and the Form as seen below will **open**
- ✓ Select **the Centre, Session Year, Semester and Department** for which you want to see the syllabus status.



✓ Clicking the show button will populate the **Syllabus Covered Department Wise Report** for the faculty (lecturer) based on the form selections made.

Here,

- ✓ Actual covered percentage is calculated based on topics covered out of the topics to be covered.
- ✓ **Syllabus covered percentage** is calculated based on the topics covered out of the total topics to be covered.





N-Plan (Fact DeptWise)

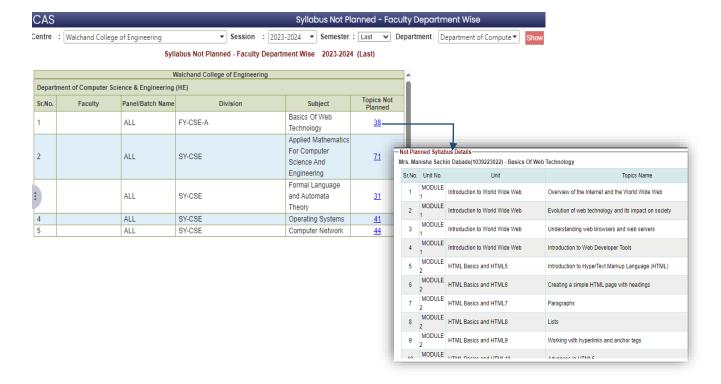
Often syllabus **planning** is done in a **phased manner** as and when needed. This report allows you to see the not planned syllabus by the various faculties assigned to a particular department.

- ✓ Click on the **N-Plan (fact dept wise)** in the Syllabus main menu and the **Form** as seen below will **open**
- ✓ Select **the Centre, Session Year, Semester and Department** for which you want to see the not planned syllabus.



Clicking the show button will populate the **Syllabus Not Planned – Faculty Department Wise Report** showing the number of topics not planned by the lecturer for a particular division and subject based on the form selections made.

Clicking on the number of "Topics Not Planned" will open a new tab showing the Unit No., Unit and Topic Name of the topics not planned by a particular faculty (lecturer) for a particular division and department.





N-Plan (Sub DeptWise)

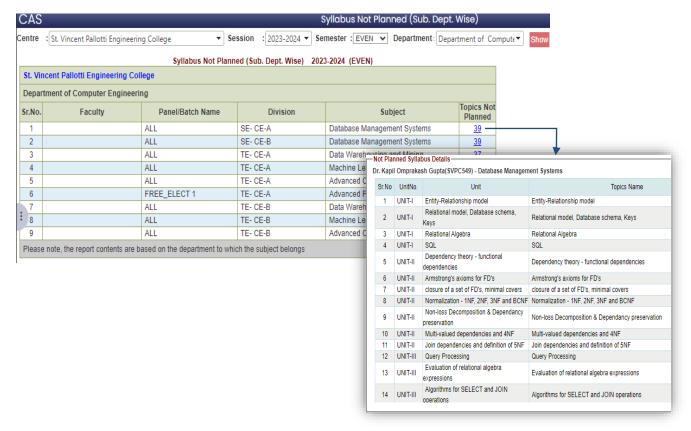
Often **Syllabus planning** is done in a **phased manner** as and when needed. This report allows you to see the not planned syllabus for all the various subjects related to a particular department.

- ✓ Click on the **N-Plan (Sub DeptWise)** in the Syllabus main menu and the **Form** as seen below will **open**
- ✓ Select the Centre, Session Year, Semester and Department for which you want to see the not planned syllabus.



Clicking the show button will populate the **Syllabus Not Planned – Subject Department WiseReport** showing the number of topics not planned for a subject related to a particular department based on the form selections made.

Clicking on the number of "Topics Not Planned" will open a new tab showing the Unit No., Unit and Topic Name of the topics not planned by the faculty (lecturer) for a particular subject related to the department.



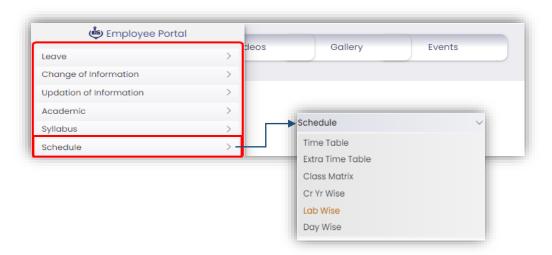


Schedule Main Menu

Purpose:

A schedule for a college includes all the details important for lecturer's effective time management, class preparation and coordination with colleagues. It gives details like which class will be conducted on which day, when and in which hall. Lecturers can also view extra class details from the schedule tab and the occupancy status of the different halls and labs.

- ✓ This menu can be seen in the **left hand side employee portal**.
- ✓ Click on the **Schedule menu** in the Employee Portal



Drop down will show the options to view the following reports

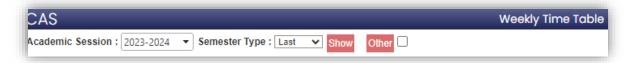
- o Time Table
- o Extra Time Table
- o Class Matrix
- o Cr Yr Wise
- o Lab Wise
- o Day Wise



Time Table

Faculty can view his/her timetable from this tab. It gives them a glimpse into which lecture is on which day of the week and at what time based on the academic session and semester type selected

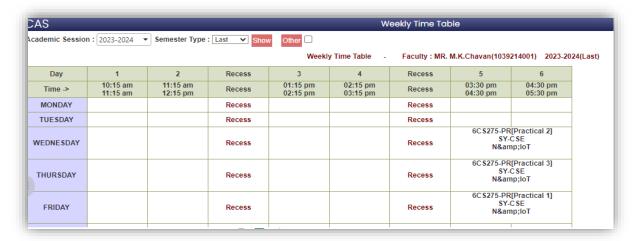
- ✓ Click on Time Table tab in the Schedule main menu and the Form as seen below will open
- ✓ Select **the Academic Session and Semester Type** for which you want to see the time table.



✓ Clicking the **show button** will populate the **Day-wise** and **Time-wise Weekly Time Table** of the lecturer based on the form selections made.

Extra Time Table

Faculty can view his/her timetable for the **extra classes planned**. It gives them a glimpse into which extra lecture is on which day of the week and at what time based on the academic session and semester type selected.



- ✓ Click on Extra Time Table tab in the Schedule main menu and the Form as seen below will open
- ✓ Select **the Academic Session and Semester Type** for which you want to see the time table.



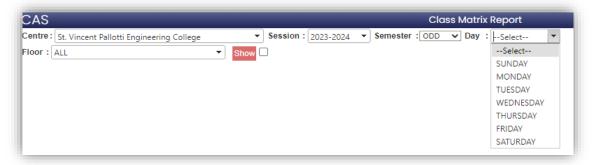


✓ Clicking the show button will populate the Day-wise and Time-wise Extra Time Table of the lecturer based on the form selections made.

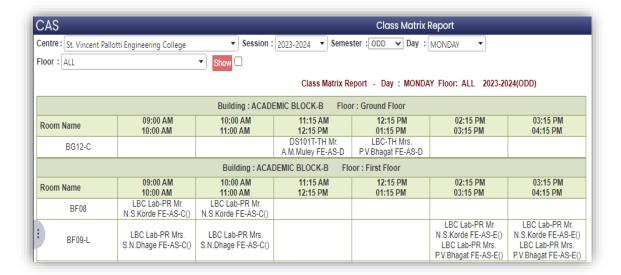
Class Matrix

Colleges have many classroom in which lectures are conducted. Class matrix serves as an **occupancy index** for all the different **rooms** in which classes can be conducted.

- ✓ Click on Class Matrix in the Schedule main menu and the Form as seen below will open
- ✓ Select the Centre, Session, Semester, Day (week day) and Floor for which you want to see the Class Matrix Report.



- ✓ Clicking the show button will populate **the Class Matrix Report** based on the form selections made.
- ✓ The table shows Day-wise and Time-wise room occupancy details as per the Room Name.





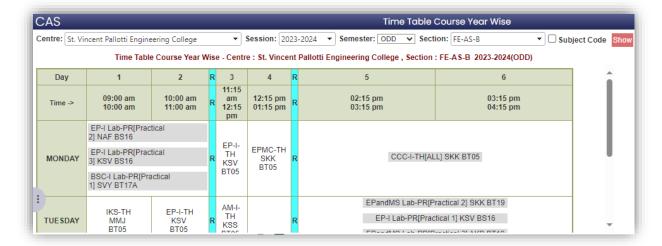
Cr Yr Wise:

Lecturers can know the day wise and time wise schedules based on the centre, session, semester and section selected.

- ✓ Click on **Cr Yr Wise tab** in the Schedule main menu and the **Form** as seen below will **open**
- ✓ Select the **Centre, Session, Semester** and Section from their respective drop down menus. Subject code can be selected or deselected as needed.
- ✓ Clicking the show button will populate **the Course Year Wise** Time Table sheet based on the form selections made.



The table shows Day-wise and Time-wise details. Column with Highlighted R refers to recess.





Lab Wise:

Lecturers can know the day wise and time wise schedules based on the Centre, session, semester and a Laboratory selected to view the time schedule and its occupancies status.

- ✓ Click to select the College name ->select the 'Session' -> Now Select the appropriate 'Semester'
- ✓ Now select the **'Laboratory'** for which you wish to see the time schedule.



Day Wise:

Lecturers can know the day wise and time wise schedules of any Department.

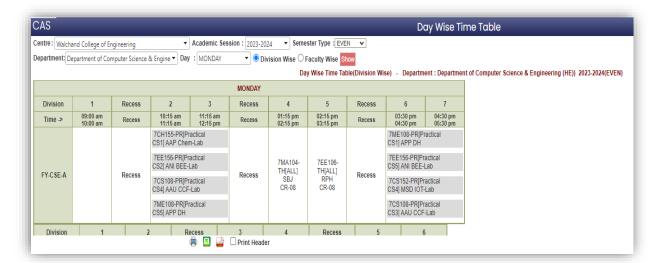




TABLE OF CONTENTS

•	Purpose of Director Portal	Pg.2
•	Monitoring	Pg.3
	o Campus Position	Pg.3
	o Employee Position	Pg.5
	o Student Position	Pg.6
	o Academic Position	Pg.7
	o <u>Fees Position</u>	Pg.9
•	Graphical Dashboards	Pg.11
	o <u>Time Table</u>	Pg.11
	o Employee Profile	Pg.12
	o Student Profile	Pg.12
	o Admissions Dashboard	Pg.13
	o <u>Biometric Attendance</u>	Pg.13



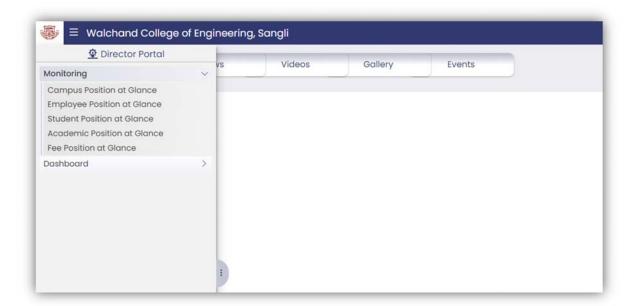
Purpose of Director Portal

As the ERP is an integrated solution connecting with all the sectors of an Education Institution and bringing their respective policy and transaction data into a single database it is very essential to have a single window report with data in analytical and in graphical formats for the chairpersons / higher management to be able to view / analyze and strategies course of action beneficial in institution's growth.

How to Reach:

Login with credentials

Then upon clicking on the Module 'Director Portal' you could be able to see the below screen.



Then Selectively you can click on either of the dropdown menus like 'Monitoring' or 'Dashboard' in order to access various analytical and graphical reports related to various sectors of the College.



MONITORING

Campus Position at a Glance

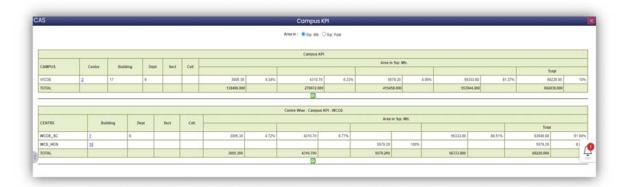
As we have captured the campus infrastructure into the ERP along with Buildings / Wings/ Floor / Rooms details with amenities and fixtures and its layout details. This Key Performance Indicator report gives us a glimpse of the Campus infrastructure and its readiness and availability with carpet area details.

How to reach:

Upon clicking on the respective menu it will open a single line KPI with hyperlinked data figures could be further elaborated through a drill down approach.



✓ Upon clicking on the center count it will further elaborate in number of units as centre wise KPI which would give a glimpse of unit wise buildings.

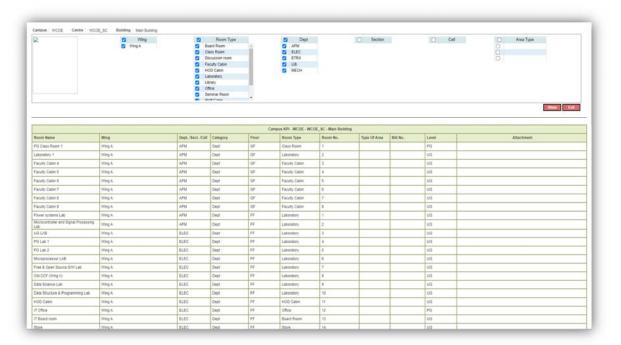


✓ Upon clicking on the count mentioned under building it will further elaborate into each building wise details, in which you can view further detailed data about wings and rooms associated with it.





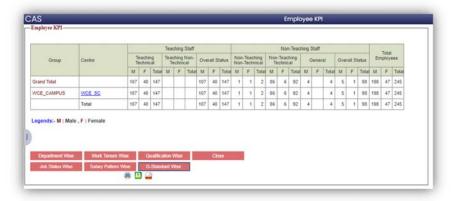
✓ If you intend to see a building's specific data then you need to click on the building links and a window shall open with filters in which you have to select the specific filters with which you wish to see the data report.



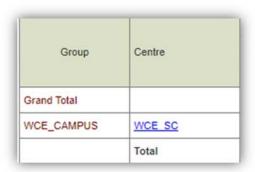


Employee Position at a Glance

This report is a KPI giving a glimpse of the current status of employees associated with the College with various categorization.



As the above report follows a drill down approach thus to have its view with various aspects kindly follow the below steps



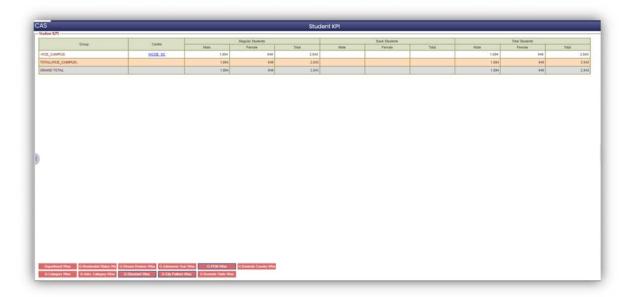
- ✓ Click on the hyperlink below center
- ✓ Then click on any option as mentioned below to view more precise categorized reports.





Student Position at a Glance

This report is a KPI giving a glimpse of the current status of the Students admitted with the College with various categorization.



As the above report follows a drill down approach thus to have its view with various aspects kindly follow the below steps

✓ Click on the hyperlink below center



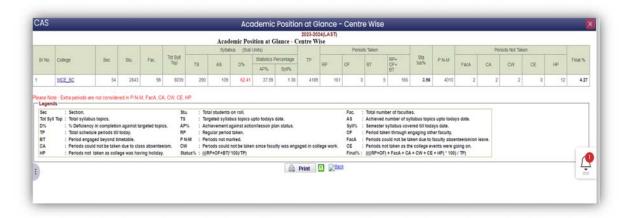
✓ Then click on any option as mentioned below to view more precise categorized reports.





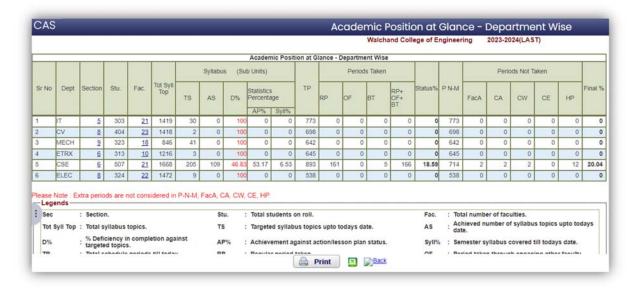
Academic Position at a Glance

This report is a KPI at the college level which gives you and abstract summary of the Academic position of the college of an ongoing semester including the perspective of Syllabus planned and achieved as well as Periods / classes initiated as per Time table and conducted by the Faculties. This report follows a drill down approach showing the analysis from Macro level to Micro level.



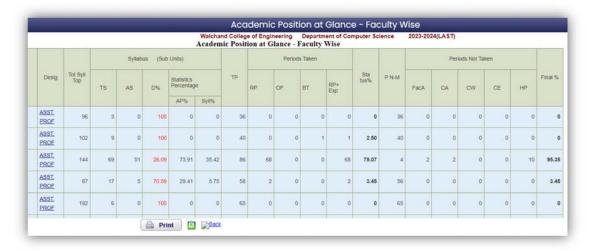
As the above report follows a drill down approach thus to have its view with various aspects kindly follow the below steps.

- ✓ Click on the hyperlink below College
- ✓ It will open up a new page with the statistics at departments level

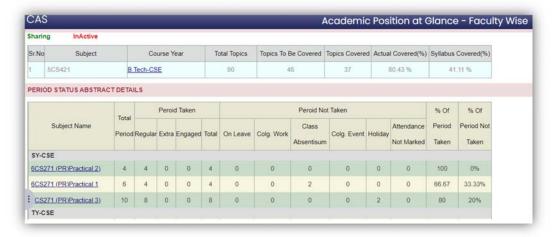




- ✓ To view a department's micro data, please click on the hyperlinked numbers below the column head 'Fac.' Which indicates the number of faculties involve at the specific department.
- ✓ Then a new page shall open indicating the list of all the teaching faculties and their individual statistics.



✓ Now to view an individual Faculty's statistics click on the 'Designation' link in front to their name in order to view more micro level data of their day to day Teaching / attendance statistics.

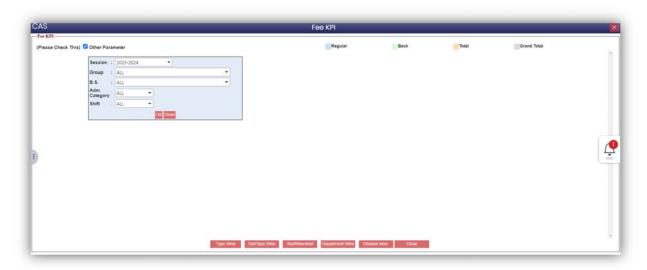


✓ Now click on the links below course year to view 'Subject Syllabus abstract details' or clink on the links below the subject name to view 'Period Status Abstract Details'.



Fees position at a Glance

This KPI report is a real time updated report showing the Fees position of the Institute as on date and time which includes the Receivable/ Receipt/ Concession- Adjustments/ Balance / Advance / Refund towards the Student & government component of Fees for admitted students.



✓ Upon selecting the necessary parameters and clicking on 'OK' the following one liner report / KPI shall open. Which is the current outstanding position of the institution.





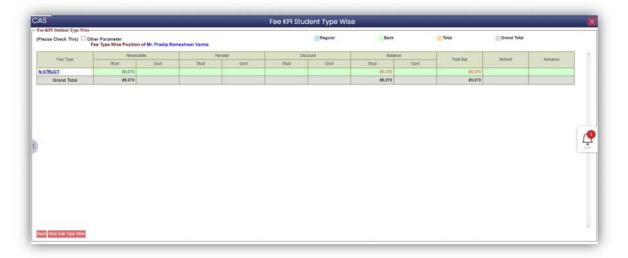
✓ Various combination of reports can be viewed by clicking the hyperlink below 'B.S' column and then clicking on the below option switches.



✓ A sample report to drill down is given below where you can view Student wise Fees outstanding position.



✓ Upon clicking on a Student's name then clicking on 'Stud Type Wise' button the below report of a student shall open.





GRAPHICAL DASHBOARDS

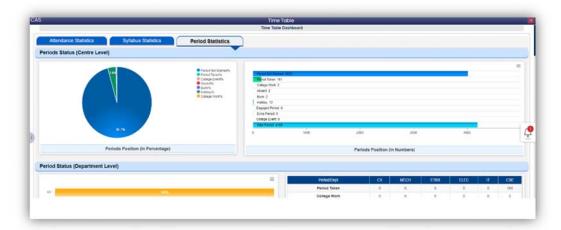
Time Table

It's a graphical dashboard showing the glimpse of the institute's academic position with various graphical analysis.



✓ It follows a drill down approach as upon clicking over the 'College Name' it shall give you various academic entity wise graphical analysis report.

Period Statistics



Syllabus Statistics

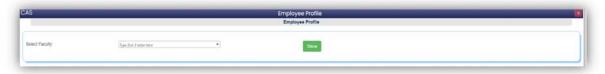




Employee Profile Dashboard

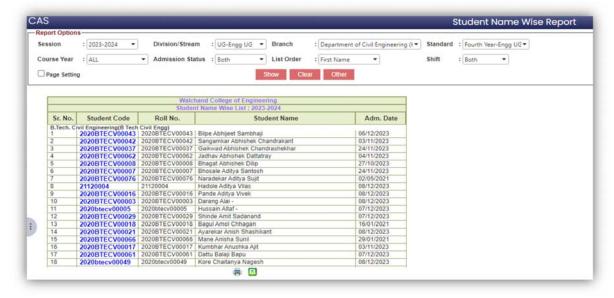
Its an employee specific data report giving a glimpse of an Employee's academic contribution his/ her Class conduction statistics and a detailed self profile about an employee.

✓ Search an employee name and click on show to populate Employee's profile data.



Student Profile Dashboard

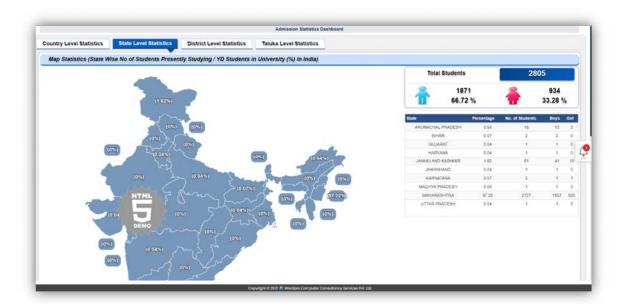
- ✓ It's a Student specific data report giving a glimpse of a Student's academic and extra curriculum journey in oue institution which includes his / her academic achievement, Exam Performance, Fees details, Attendance details, etc.
- ✓ Click to set the filter and select the particular student by clicking on his / her name to open up the student's profile.
- ✓ Or from right hand corner of the page you can search a student by typing his/her name.





Admissions Dashboards

To view an academic sessions admission data with graphical and analytical analysis the below dashboard gives you a glimpse of the entire Admission position at a glance. And have distinct geographical distribution of Students residing from various places.



Biometric Dashboard

As Employee attendances are through Biometric devices this real time drill down dashboard gives a glimpse of the Employees supposed to be present as per current shift and amongst them how many have reported to duty / absent/ Late comings / on-leave...





Leave Application Form and Process Explained

TABLE OF CONTENTS

	•	
•	Purpose of the Leave Application Form	Pg.2
•	How to Fill in the Employee Leave Application	Pg.3
•	How to Select Alternate Arrangement	Pg.5
•	How to Edit Alternate Arrangement	Pg.7
•	Leave approval by Alternate Arrangement	Pg.9
•	Leave Approval by Approver-1	Pg.11
Leave	e Application Other Form	
•	Purpose of the "Leave Application Other" Form	Pg.13
•	Checking the Employee Leave Summary	Pg.14
•	Fill in Leave Application Details in Leave Application Others Form	Pg.15
•	How to Add Alternate Arrangement	Pg.17
Cance	el Approved Application	
•	Purpose of "Cancel Approved Application" Form	Pg.19
•	Process to Cancel Approved Leave	Pg.20
Repo	rts – Related to Leaves	
•	Leave Details	Pg.21
•	Leave Register(Abstract – Details)	Pg.22
	Leave Register/Details)	Ρσ 23

Leave Register for C-OFF

Leave Pending For Approval

<u>Time Taken to Process Applicants Leave</u>

Application Status Wise Pg.26

Time taken by Alternative/Approver to Process Leave Pg.29

Pg.25

Pg.27

Pg.30



Purpose of the Leave Application Form

Employees in a college are entitled to take different types (EL, COF, OD, ML, CL, LWP) and number of leaves. Leave application form allows you to apply for leave under a particular leave type based on the leave summary. You can also set a hierarchy for leave approval like first it goes to the alternate arrangement, then to the Approver-1. Status of employee leaves whether approved or in process and the count for allotted leaves for all the different types of leaves the employee is entitled to, leaves utilized, and balance can be seen in the leave summary table.

How to Reach:

Leave main menu can be seen in the left hand side employee portal.

Click on the **Leave Menu** in the Employee Portal



Drop down menu will show the following two options

- ✓ Application: To apply for a leave
- ✓ Edit Alt. Arrangement : You can edit the Details of your replacement during your leave period

Only authorized personnel will see the tabs for

Application Other: To apply for leave on behalf of other employee

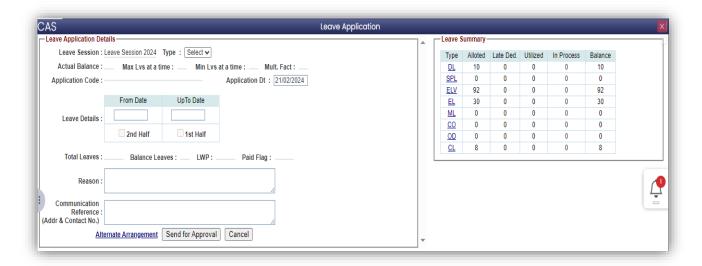
Cancel Approved Application: To cancel approved leave of an employee



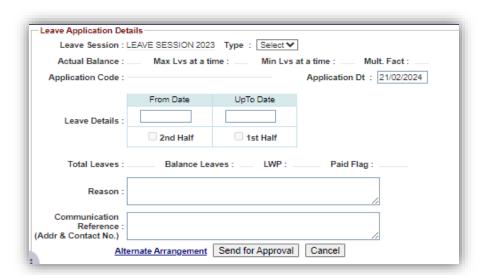


How to Fill in the Employee Leave Application Form

It allows employees to formally **request leave** for personal, medical, or other reasons. It establishes **a clear record** of the employee's leave request including the **leave duration**, the reason for the absence and alternate arrangement.

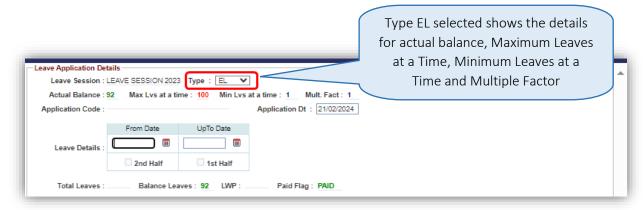


To apply for a leave you will be required to fill in the details asked for in the "Leave Application Details" side of the form

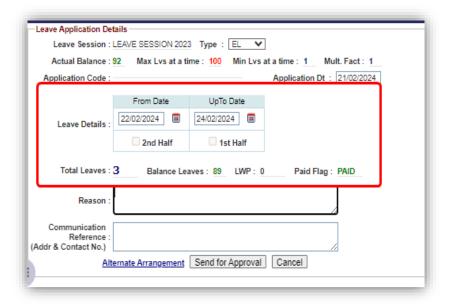




Based on the Leave Type selected the form will automatically show the details for Actual Balance, Maximum Leaves at a Time, Minimum Leaves at a Time and Multiple Factor.



Select the leave datesfor "From Date and Upto Date" by clicking on the calendar icon and it will show the details for total leaves (number of days between the from and upto dates selected), Balance Leaves, LWP (Leaves Without Pay) and Paid Flag (whether paid or unpaid).



NOTE:

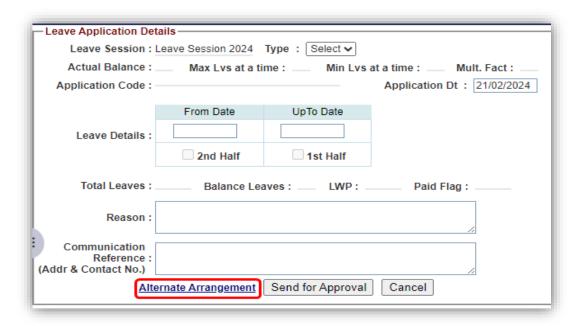
If you want to take half day leave then you need to select the same date in both the From Date and Upto Date fields and tick the half day $(2^{nd} \text{ half or } 1^{st} \text{ half})$ option accordingly.

- Enter the **Reason for leave and Communication Reference** (address or a phone number) on which you can be contacted during your leave period.
- o Lastly you need to **select your alternate arrangement -** someone who is willing to fill in for your absence.

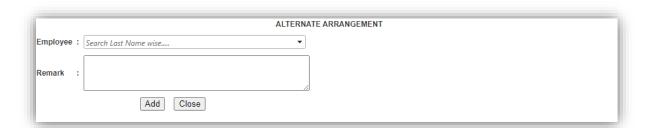


How to Select Alternate Arrangement

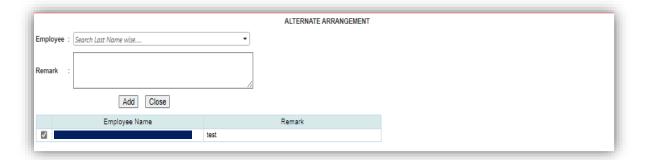
Click on the Alternate Arrangement text link



Pop up to fill in the **details of the alternate arrangement** will open. Select the **employee** name (using last name to search) and put in the **remark**.



Clicking the **Add Button** will populate a **screen confirming** the appointment of alternate arrangement. You can also add **another** alternate by **selecting** the employee name and adding the remark. Click on **close** to go **back** to the "leave application screen".

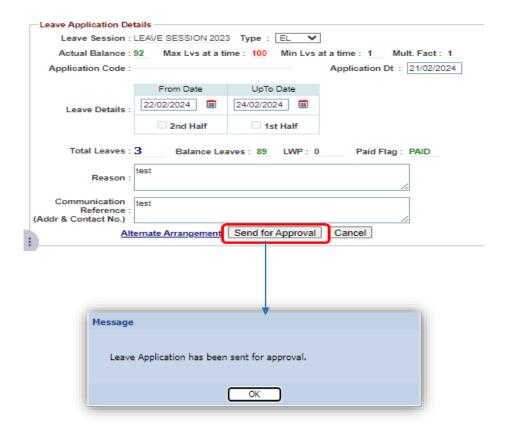




After adding the Alternate Arrangement you can click the "Send for Approval" button or the cancel button.

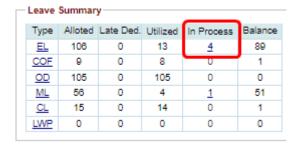
NOTE: Employee can cancel the leave application only on the same day when he/she applied for it not after that.

Clicking the "send for approval" button will show a pop with the message "Leave Application has been sent for approval"



Click Ok to complete the employee leave application process.

Leave Summary: You will notice that the Leave Summary now shows **4 leaves in Process** for the leaves you just applied



NOTE:

✓ Leave application has been sent for approval means that it will be first sent to the alternate arrangement and then to the approver, set/appointed as per the leave rules.

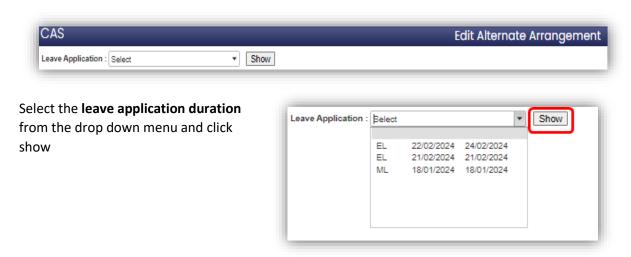


How to Edit Alternate Arrangement

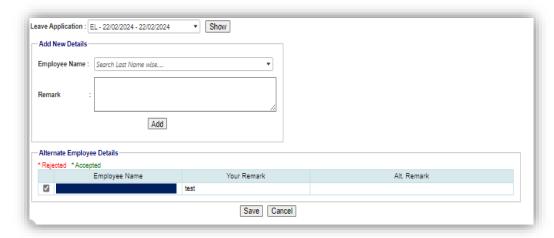
For some reason if you want to **change the alternate arrangement** you can do so by clicking on the "Edit Alternate Arrangement" tab in the Leave Main Menu.



Edit Alternate Arrangement Page as shown below will open

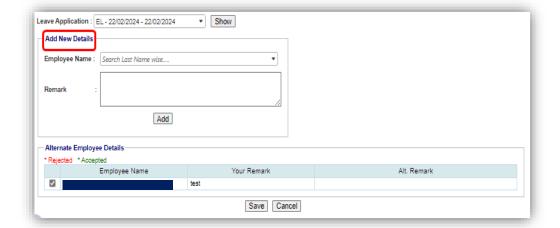


It will populate a screen where in you can **add new alternate arrangement**. It also shows details of the alternate arrangement made earlier and the new alternate you just arranged.



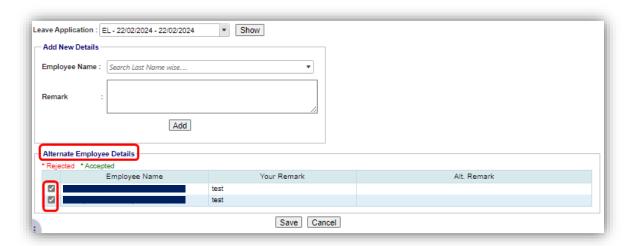


Add **details** of the new alternate arrangement

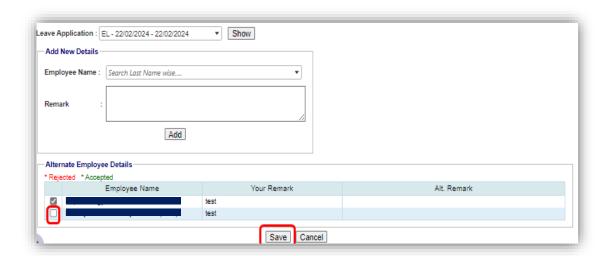


New alternate

arrangement details will show in the Alternate Employee Details box. Both the **alternatives** will have **a ticked box** in front of them



To **remove an alternate arrangement** simply **untick the box** and click **save**, it will now show the new alternate added.





Leave Application Approval by Alternate Arrangement

NOTE:

The leave application first goes to the alternate arrangement's account for approval.

When the alternate arrangement logs in the CASERP he/she needs to select "Employee Leave" tab to see alerts for pending leave application approval.



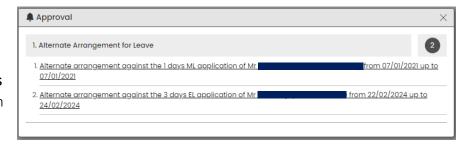
The **bell icon** on the **right hand centre corner of the screen** will show alert for leave applications received for approval.





Click on the **approval button** and a pop up
"Alternate Arrangement
for Leave" will show

Clicking the "Alternate
Arrangement for Leave" will
further stretch the box to
show all the leave applications
where the employee has been
made the alternate
arrangement.





Click on the **leave application** you wish to act on and an **Alternate Arrangement Acceptance** form as shown below will open



Put in the remark and click **Accept or Reject**. Accepting will show a pop up mentioning "Leave **Application is ACCEPTED successfully**". The leave application will now move to the **Approver 1**-set as per the leave rules.



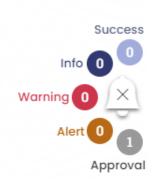


Leave Application Approval by Approver-1

As the Approver -1 logs in the CASERP the landing page as shown below will appear, and he/she will be required to click on **Employee Leave tab**



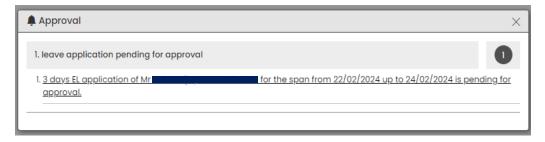
The bell icon in the centre of the right hand of the screen will show the notifications for requests received for "Approval"



Click on the Approval alert and a pop up as shown below will open

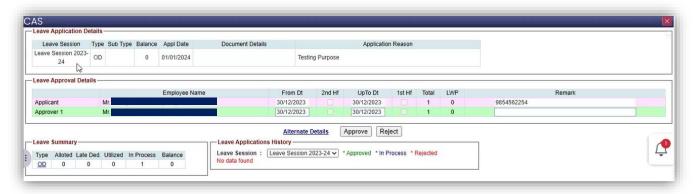


Click on the "leave application pending for approval" it will further stretch to show the details of the leave application





Clicking the link will take you to the Leave Approval screen



Approver-1 can view the alternate arrangement details by clicking on the alternate details link under the Leave Approval Details Box



Applicant's **Leave Summary** and **Leave Application History** are also shown through tables to help **approver decide** whether to **approve or reject** the leave based on the data shown.

Before clicking the Approve or Reject button Approver-1 needs to add a remark. Clicking the Approve button will then pop up message "Work done successfully".



Note:-

• Leave so approved will then show in the applicants account in the leave summary table under the "Utilized" column. Since one day leave is approved utilized table shows 1.





Purpose of the "Leave Application Other" Form

It allows **HR executive and other** authorized person to formerly request for leave on behalf of an employee who is not able to fill it due to some reason. Employee **leave summary** appears on the right-hand side of the form. You can also **add "Alternate Arrangement"** (someone to fill in for the employee on leave).

How to Reach:-

Authorized employee needs to log in the CASERP and select "Employee Leave" tab.



Click the main menu on the left hand side. You will see the "Leave" tab.



Click on leave tab and a drop down menu will open, you need to click on "Application Other"

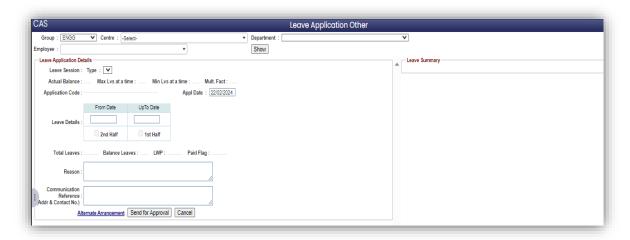




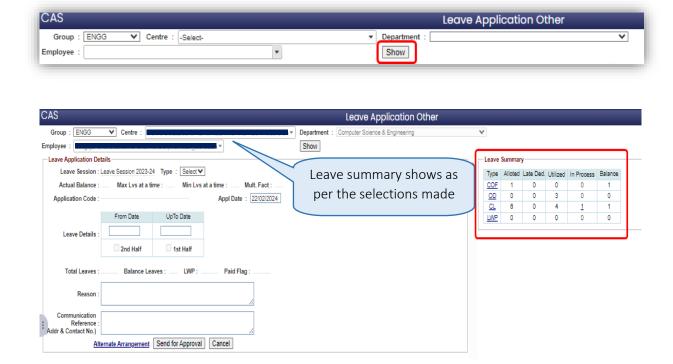
Checking the Employee Leave Summary

The **first** step to filling the leave application form for others is to **know the employee leave summary** as it will help decide the leave type.

When you click on Leave Application Other a "Leave Application Other Form" as seen below will open



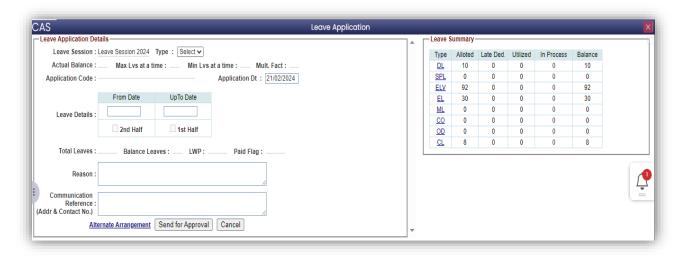
To view employee leave summary select the **Group, Centre, Department and Employee name** from the drop down menus and click on the **Show button**



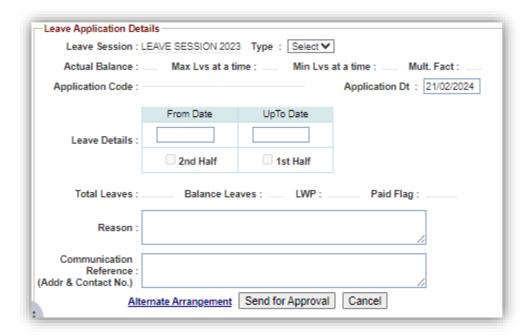


Fill in the Leave Application Details in Leave Application Others Form

It allows HR or other authorized employee to formally **request leave** for personal, medical, or other reasons**on behalf of an employee**.

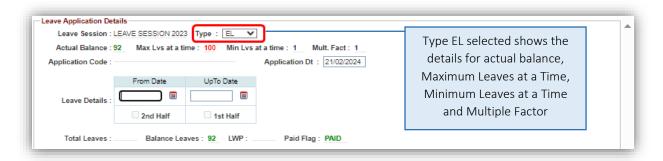


To apply for a leave you will be required to fill in the details asked for in the **"Leave Application Details"** box of the form

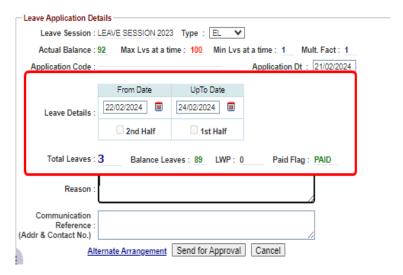




Based on the **Leave Type selected** the form will automatically show the details for **Actual Balance**, **Maximum Leaves at a Time**, **Minimum Leaves at a Time and Multiple Factor**.



Select the leave details for "From Date and Upto Date" by clicking on the calendar icon and it will show the details for total leaves (number of days between the from and upto dates selected), Balance Leaves, LWP (Leaves Without Pay) and Paid Flag (whether paid or unpaid).



Note:-

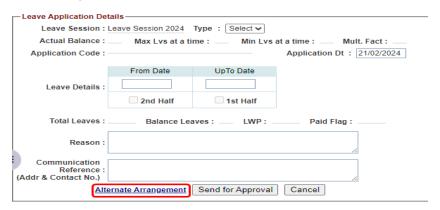
If an employee is on half day leave then select the same date in both the From Date and Upto Date fields and tick the half day $(2^{nd} \text{ half or } 1^{st} \text{ half})$ option accordingly.

- o Enter the **Reason for leave and Communication Reference** (address or a phone number) on which the employee can be contacted during the leave period.
- o Lastly **select alternate arrangement** someone who is willing to fill in for the employee's absence.



How to Add the Alternate Arrangement

Click on the Alternate Arrangement text link



Pop up to fill in the **details of the alternate arrangement** will open. Select the **employee** name (using last name to search) and put in the **remark**.



Clicking the **Add Button** will populate a **screen confirming** the appointment of alternate arrangement. You can also add **another** alternate by **selecting** the employee name and adding the remark. Click on **close** to go **back** to the "leave application screen".



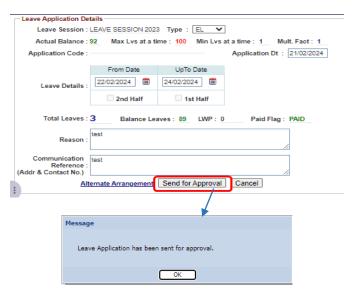
After adding the Alternate Arrangement you need to send the application for approval by clicking on the "Send for Approval" button. Clicking the cancel button will cancel the leave application.

Note:-

Employee can cancel the leave application on the same day only when he/she applied for it not after that.



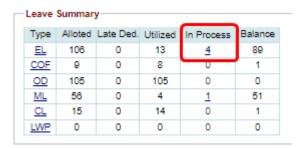
Clicking the "send for approval" button will show a pop with the message "Leave Application has been sent for approval"



✓ Click Ok to complete the employee leave application process.

Leave Summary

You will notice that the Leave Summary now shows 4 leaves in Process for the leaves just applied



Note:-

Leave application has been sent for approval means that it will be first sent to the alternate arrangement and then to the approver who has been set or appointed as per the leave rules.



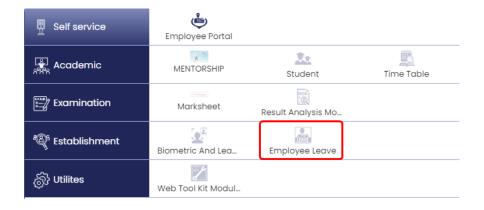
Purpose of "Cancel Approved Application" Form

An employee can cancel a leave on the same day when he/she applied for it and not after that. Only HR or authorized personnel can cancel approved leave applications.

As the name suggests the main purpose of the form is to allow HR or Authorized personnel to cancel an approved leave application for an employee who now no longer wants that leave.

How to Reach:

Authorized employee needs to log in the CASERP and select "Employee Leave" tab.



Click the main menu on the left hand side. You will see the "Leave" tab.



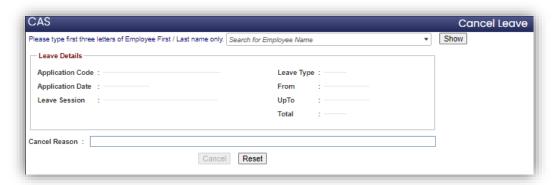
Click on leave tab and a drop down menu will open, you need to click on "Cancel Approved Application"



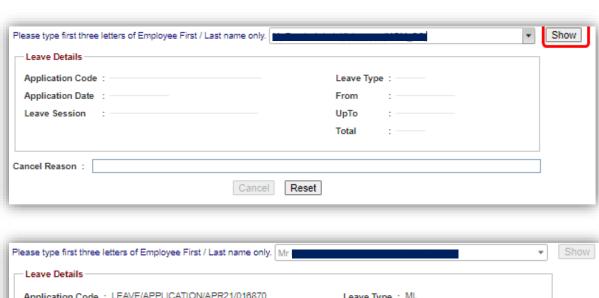


Process to Cancel Approved Leave Application

When an employee no longer needs a leave which was previously approved **HR or authorized** personnel can cancel the approved leave from the Cancel Leave form.

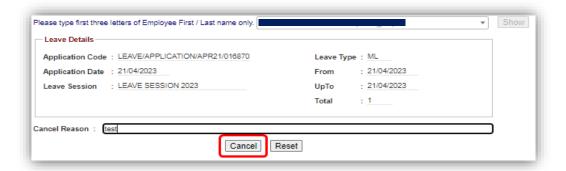


- ✓ **Select** the name of the **Employee** whose approved leave you want to cancel by typing in the first three letters of the name.
- ✓ Clicking the show button will show the leave details





Enter the Cancel Reason for cancelling the leave and click Cancel

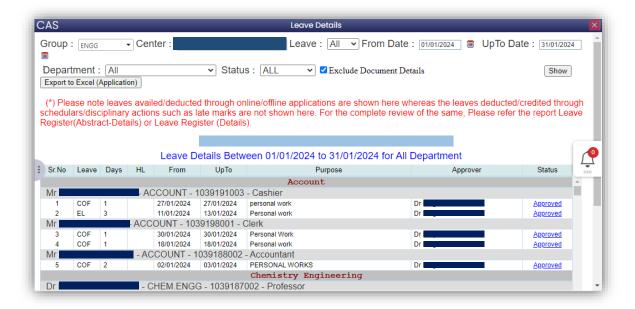


Pop up with the message "Leave Application Cancelled Successfully" will appear. Click Ok and the leave will be cancelled.



1. Leave Details

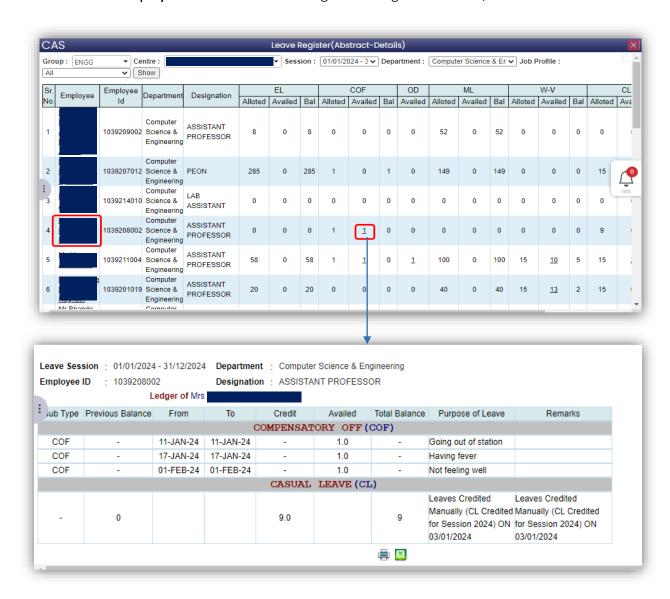
- User needs to select **Group**, **Centre**, **Department**, **Leave type**, **From Date Upto Date**, **Status** from their respective drop-down menus to view leave details of all employees.
- User can also fetch the leave details as per **status of application** like In Process, In-Approval, Approver, Cancelled and Rejected.





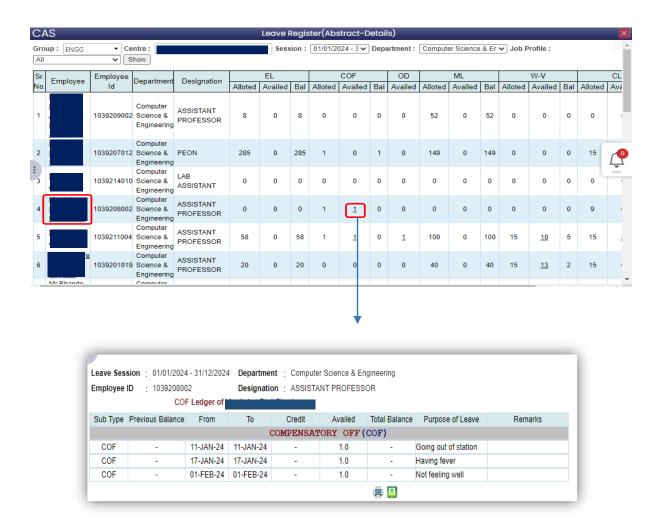
2. Leave Register (Abstract – Details)

- o To see leave register (Abstract-Details) report user needs to select the **Group, Centre, Session, Department and Job Profile** from the respective drop down menu.
- o Table showing different leave types and their status whether Allotted, Availed or Balance for each employee along with their name, ID, Department and Designation appears.
- o Click on **employee name** and a leave ledger showing details of his/her leaves will show.





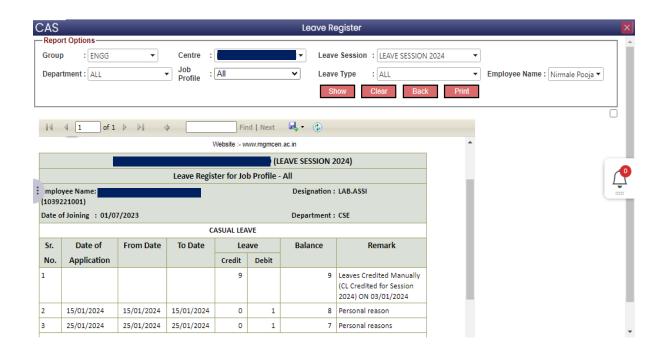
O Clicking on **count** of availed leave of any leave type, user can see leave ledger of that **particular leave type** of that employee



3. Leave Register (Details)

- To view Leave Register (Details) user needs to select **Centre, Leave Session, Department, Job Profile, Leave Type and Employee Name** from the drop down menu.
- You can either select "All or particular employee name" in the Employee Name field to view the report accordingly.

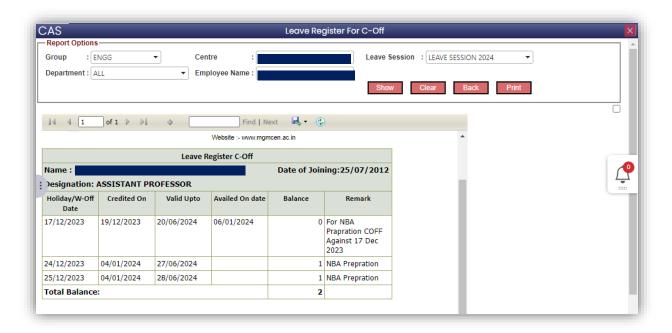






4. Leave Register for C-off

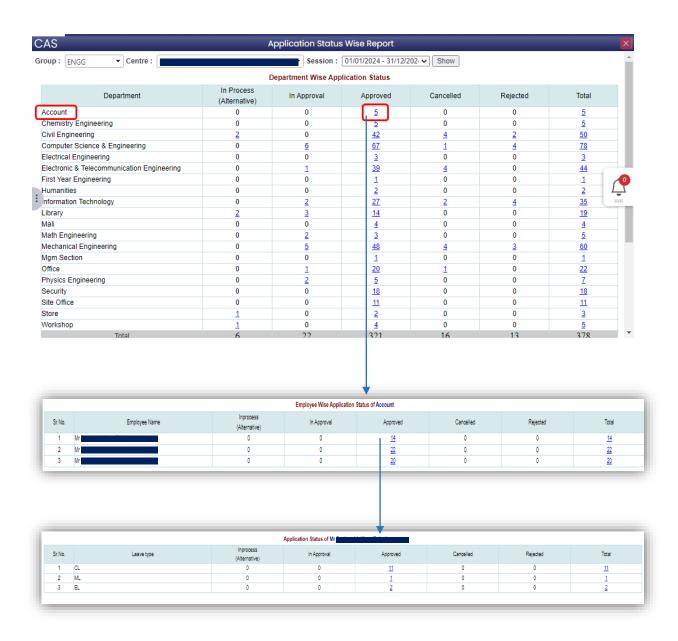
- To view Leave Register for C-off report user needs to select **Centre, Leave Session, Department, Job Profile, Employee Name** from the drop down menu.
- You can either select "All or particular employee name" in the Employee Name field to view the report accordingly.
- 6 main columns in the report include,
 - o 1. Holiday/W-Off Date: C-off credited to employee for working on which holiday/w-off date.
 - o 2. Credited On: On which date C-off was credited to employee account.
 - o 3. **Valid Upto:** Valid Up to means expiration date of that credited c-off. After expiration user cannot use that credited C-off.
 - o 4. Availed on date: If user used that c-off for leave that leave application date will display here.
 - o 5. Balance: Current c-off balance count will display in balance column.
 - o 6. **Remark:** C-off leave used for which reason will display in remark column.





5. Application Status Wise

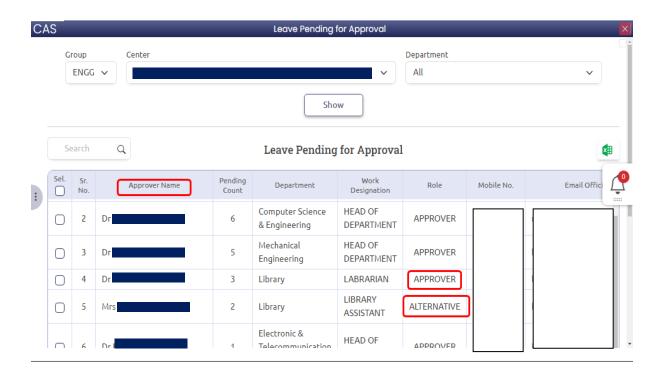
- To view **Department wise Application Status Report** user needs to select **Centre and Session** from the drop down menu.
- User can see **employee wise application status** count by clicking on **particular leave status** count.
- Again, by clicking on employee wise count, user can see **leave details** of that particular count for that particular employee.





6. Leave Pending For Approval

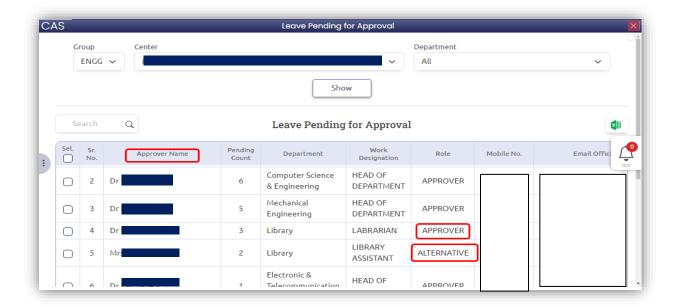
- Employee leave application first goes for approval to the alternate arrangement and then to the approver.
- Leave Pending for Approval report shows **number of leaves pending** for **approval** at approver or alternative side.
- User can see the details of approver or alternative like department, designation, mobile number and email.



7. Leave Pending For Approval

- Employee leave application first goes for approval to the alternate arrangement and then to the approver.
- Leave Pending for Approval report shows **number of leaves pending** for **approval** at approver or alternative side.
- User can see the details of approver or alternative like department, designation, mobile number and email.

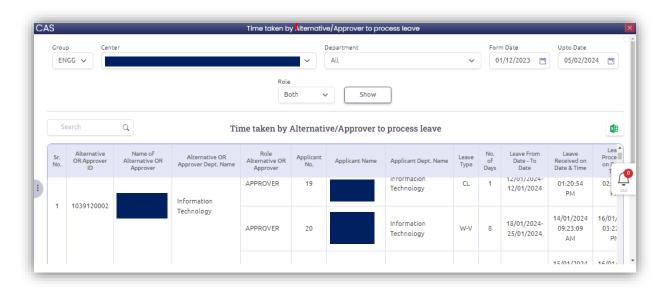






8. Time taken by Alternative/Approver to Process Leave

- As the name suggests this report shows the **time taken** by alternative/ approver to **process** leave applications.
- To view the report you need to select the **Centre, Department, From Date Upto Date and Role** from the drop down menu.
- The report shows the **approver details, applicant details and leave details** along with the time taken to process.







9. Time Taken to Process Applicants Leave

- In this report user can see the **time taken by alternative/ approver** to process leave application of a **particular applicant (employee)**.
- User can fetch the report just by entering either From Date Upto Date, Employee Name or Status.
- The report shows applicant details, approver details and leave details along with the time taken to process leave.

