

# Guidelines for declaration of custodian of e-Service Book and Creation of Workflow

## STEP-1

### Symbol used

Menu: - <xxx>

Button: - [xxx]

Tab: - (xxx)

### A. Mapping of AA code with HOO code

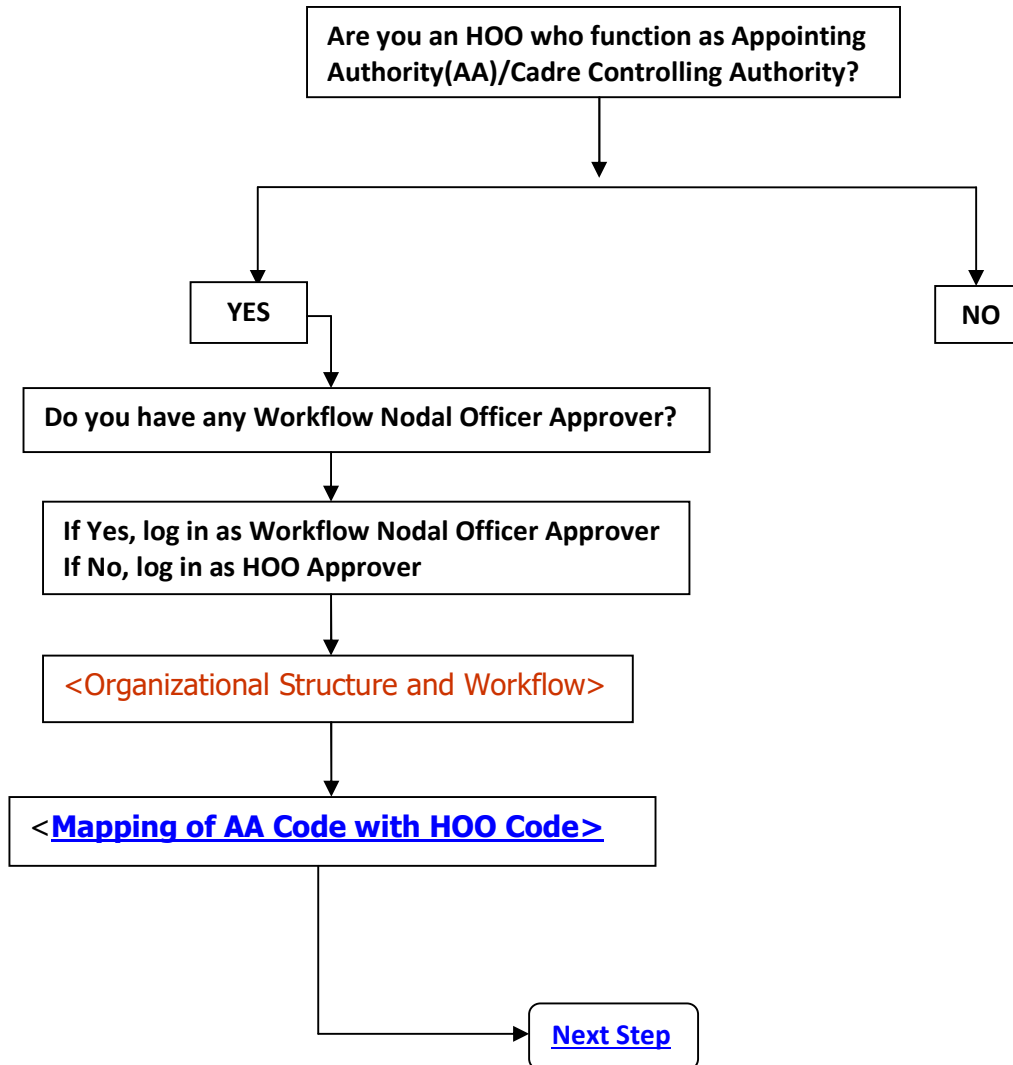
### Abbreviation Used

AA - Approving Authority

HOO - Head of the Office

CCA- Cadre Controlling Authority

{Not required if done earlier by HOO/Workflow Nodal Officer; to check, use Menu <Organizational Structure and Workflow> ⇔ <Mapping of Appointing Authority (AA) with Head of Office (HOO)> ⇨ <Approved List> }



## STEP-2

### B. Declaration of Approving Authority by AA using AA Role

#### Symbol used

Menu: - <XXX>

Button: - [xxx]

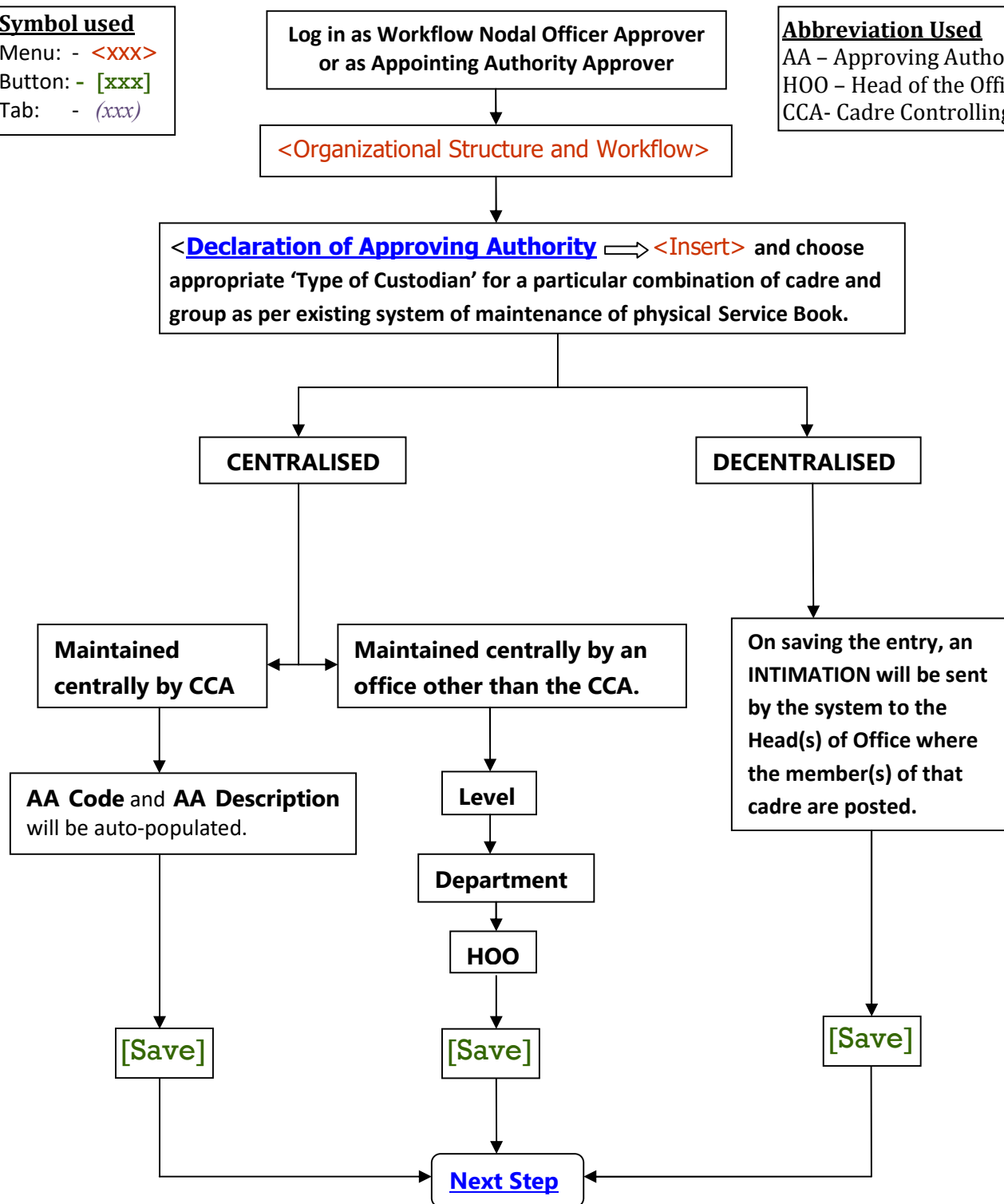
Tab: - (xxx)

#### Abbreviation Used

AA - Approving Authority

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CCA- Cadre Controlling Authority



### STEP-3

#### Symbol used

Menu: - <XXX>

Button: - [xxx]

Tab: - (xxx)

#### C. Service Book Intimation

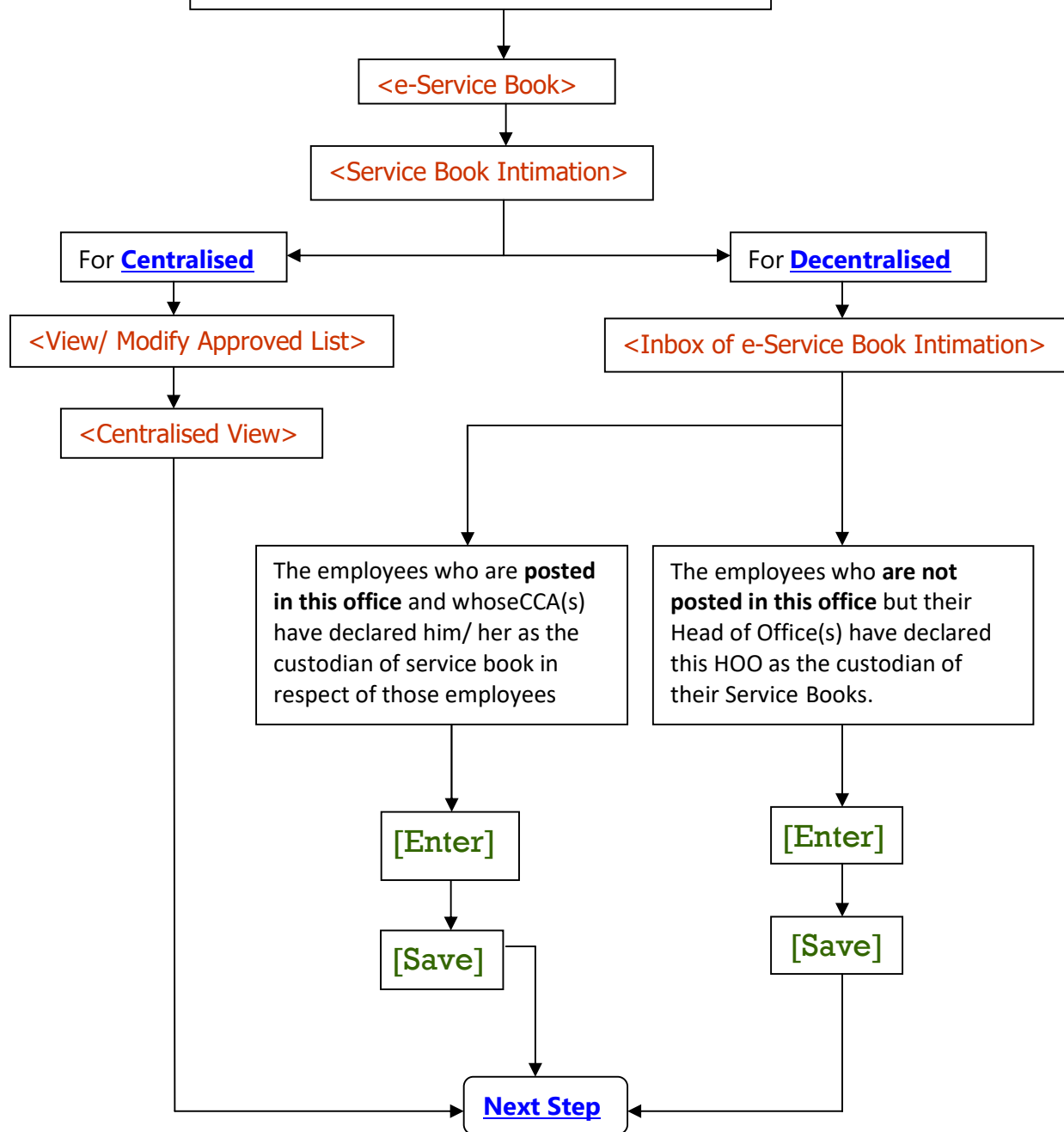
Log in as Workflow Nodal Officer, if any, or as HOO Approver Role if declared by Appointing Authority (AA) as Custodian of Service Book.

#### Abbreviation Used

AA - Approving Authority

HOO - Head of the Office

CCA- Cadre Controlling Authority



**STEP-4**

**D. Workflow Chain Creation for approval of e-Service Book**

**Symbol used**  
Menu: - <XXX>  
Button: - [xxx]  
Tab: - (xxx)

**Abbreviation Used**  
AA – Approving Authority  
HOO – Head of the Office  
CCA- Cadre Controlling Authority

Log in as Workflow Nodal Officer, if any or as HOO Role if declared by Appointing Authority (AA) as Custodian of Service Book.

<Organizational Structure and Workflow>

<Workflow>

<Create> Workflow Chain  
to deal with e-Service

Next Step

### Symbol used

Menu: - <xxx>

Button: - [xxx]

Tab: - (xxx)

### Abbreviation Used

AA – Approving Authority

HOO – Head of the Office

CCA- Cadre Controlling Authority

## 1. Mapping of AA code with HOO code

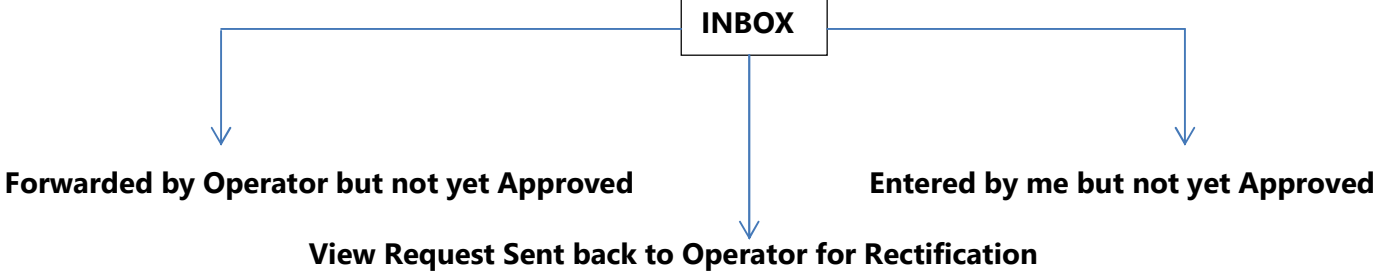
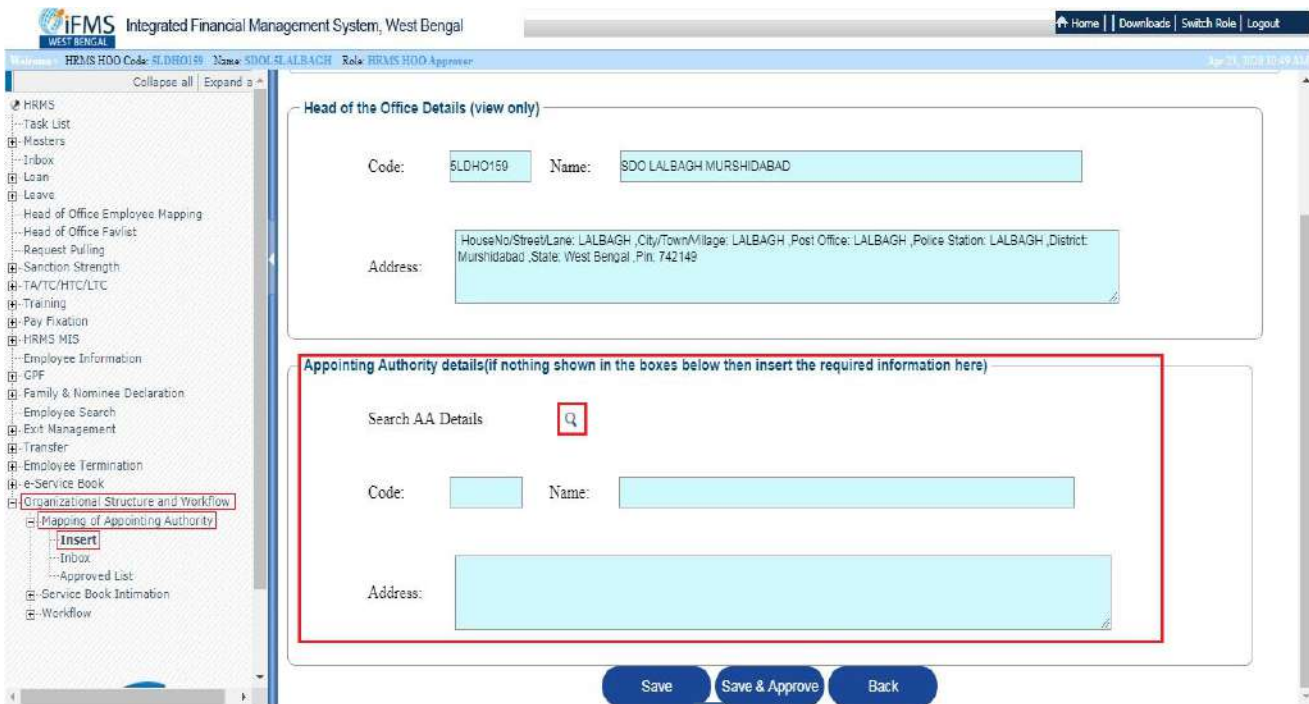
This is to be done **only by that Head of the office who himself/herself is also the Cadre Controlling Authority in respect of one or more Cadre(s) or by Workflow Nodal Officer Approver of Cadre Controlling Authority.**

Login and select **WorkflowNodal Officer Approver log in of AA/ Appointing Authority Approver Role** .Click HRMS under Application List.

Go to HRMS : Click <Organisational Structure and Workflow> → <Mapping of AA code with HOO code> → <Insert.>

If the details are shown correctly then proceed with [Save] or [Save & Approve] button. Otherwise the AA code is to be selected through the LoV (List of Values).

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"Approved List" lets the User to go through the approved mapping and make any of the approved mappings active or inactive.

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**Approved List of Appointing Authority and Head of Office mapping**

Please click the active row to modify, if required

Level	Department	HOO Office	HOO Description	Address	AA Code	AA Description	AA Address	Approver Name	Approve Date	Active Flag
L1-DEPARTMENT	Finance	118H0002	FINANCE DEPARTMENT	HouseNo/Street/Lane: Nabanna, 225 Sarat Chatterjee Road, City/Town/Village: Howrah, Post Office: Shubour, Police Station: Shubour, District: Howrah, State: West Bengal, Pin: 711102	118AA002	FINANCE DEPARTMENT	HouseNo/Street/Lane: 8, Sarat Chatterjee Street, City/Town/Village: Howrah, Post Office: Howrah, Police Station: Howrah, District: Howrah, State: West Bengal, Pin: 711102	SK AMENA BEGUM	25-02-2020	<input checked="" type="checkbox"/>
L1-DEPARTMENT	Finance	118H0002	FINANCE DEPARTMENT	HouseNo/Street/Lane: Nabanna, 225 Sarat Chatterjee Road, City/Town/Village: Howrah, Post Office: Shubour, Police Station: Shubour, District: Howrah, State: West Bengal, Pin: 711102	118AA254	WEST BENGAL ADMINISTRATIVE TRIBUNAL		SK AMENA BEGUM	07-02-2020	<input type="checkbox"/>
L1-DEPARTMENT	Finance	118H0002	FINANCE DEPARTMENT	HouseNo/Street/Lane: Nabanna, 225 Sarat Chatterjee Road, City/Town/Village: Howrah, Post Office: Shubour, Police Station: Shubour, District: Howrah, State: West Bengal, Pin: 711102	118AA339	WEST BENGAL TAXATION TRIBUNAL	HouseNo/Street/Lane: 80/B, I, Horn Mohan Lane, City/Town/Village: Kolkata, Post Office: BuoBuo, Police Station: BuoBuo, District: 24 Parganas(S), State: West Bengal, Pin: 742123	SK AMENA BEGUM	19-02-2020	<input type="checkbox"/>



BACK

NEXT

### Symbol used

Menu: - <xxx>

Button: - [xxxx]

Tab: - (xxx)

## 2. Declaration of Approving Authority by AA in AA Role:

### Abbreviation Used

AA – Approving Authority

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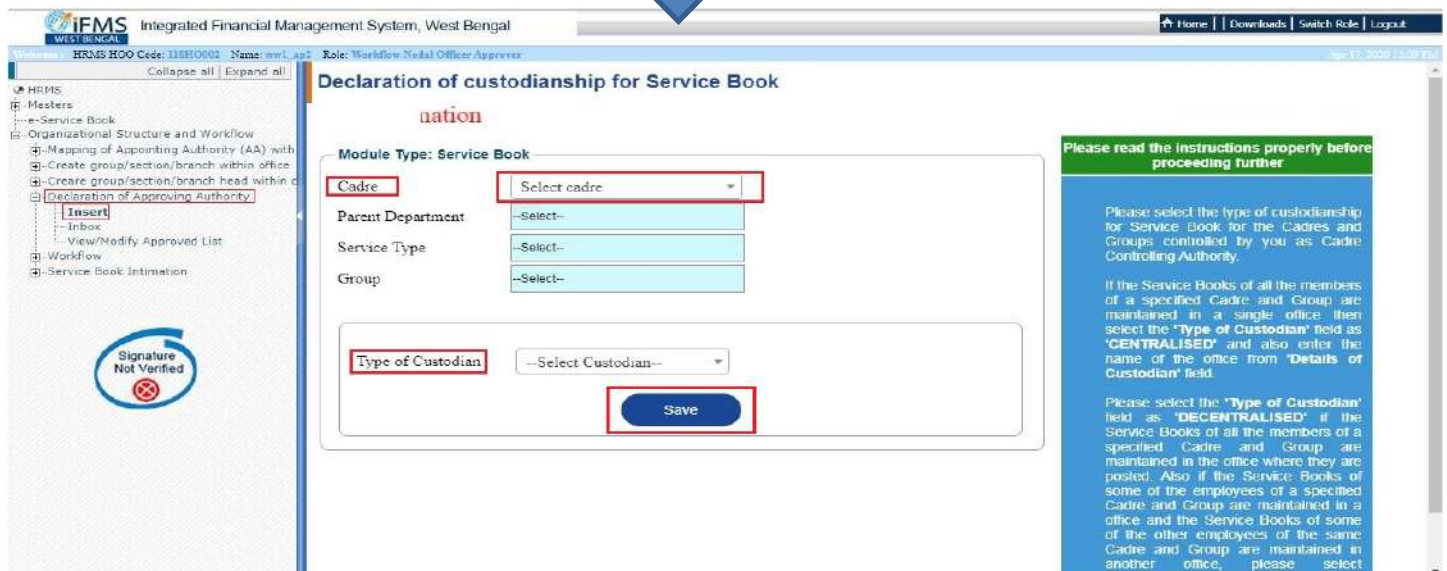
The Cadre Controlling Authority shall declare whether the Service Book is maintained in **Centralised** or **Decentralised** manner. Such declaration should be made for all such Cadres which are controlled by the Cadre Controlling Authority.

Login and select **WorkflowNodal Officer Approver log in of AA/ AA Approver Role** ->Go to HRMS : click <Organisational Structure and Workflow> ⇨ <Declaration of Approving Authority> ⇨ <Insert> ⇨ [Service Book]



The screenshot shows the HRMS interface for the role of Workflow Nodal Officer Approver. The main heading is "Declaration Of Sanctioning Authority". A blue button labeled "Service Book" is highlighted with a red box. Below it, a green banner reads "Please read the instructions properly before proceeding further". The main content area contains text explaining the purpose of the screen and provides two examples: Example 1 describes a centralized custody scenario for two cadres in one department, while Example 2 describes a decentralized custody scenario for cadres in different offices. A "Signature Not Verified" icon is visible in the bottom left corner.

Enter the name of Cadre from dropdown menu and **enter Parent Department, Service Type & Group** accordingly. Select the Type of Custodian from the dropdown and [Save].



The screenshot displays the "Declaration of custodianship for Service Book" form. The "Module Type" is set to "Service Book". The form includes several dropdown menus: "Cadre" (with a red box around the input field), "Parent Department", "Service Type", "Group", and "Type of Custodian" (with a red box around the dropdown). A "Save" button is highlighted with a red box. A green banner at the top right reads "Please read the instructions properly before proceeding further". The instructions on the right side of the form explain the difference between "CENTRALISED" and "DECENTRALISED" custody types. A "Signature Not Verified" icon is present in the bottom left corner.

[BACK](#)



**Symbol used**

Menu: - <XXX>

Button: - [xxx]

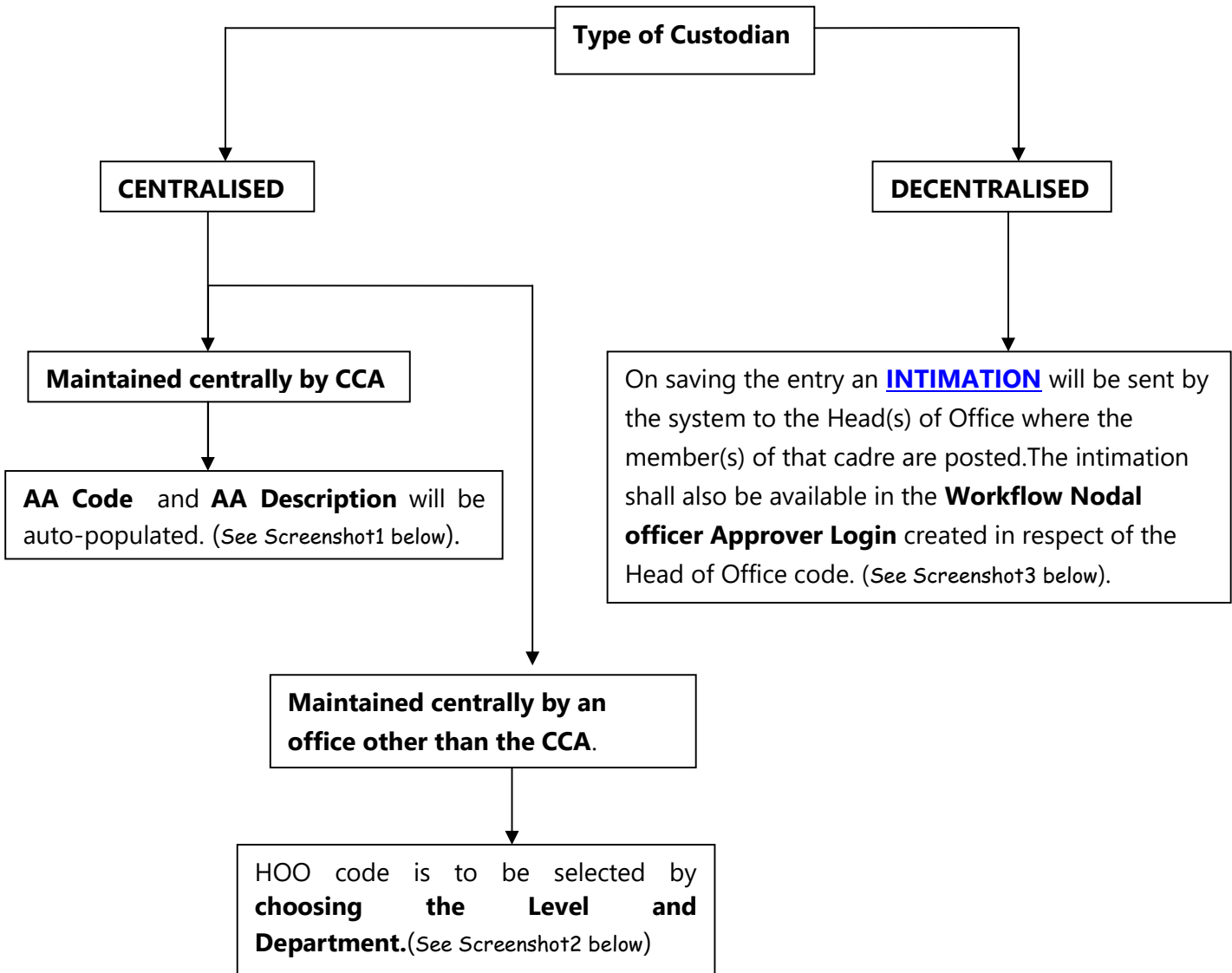
Tab: - (xxx)

**Abbreviation Used**

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**BACK**

Welcome | HRMS HOO Code: 118H0002 | Name: sw1\_ap2 | Role: Workflow Nodal Officer Approver

Collapse all | Expand all

**Declaration of custodianship for Service Book**

**SAVE' button to retain the information**

Module Type: Service Book

Cadre: Others

Parent Department: Finance

Service Type: State Government

Group: A

Type of Custodian: Centralised

Details of Custodian: Maintained centrally by cadre controll...

AA Code: [ ]

AA Description: [ ]

Save

Signature Not Verified

Pic -1

Welcome | HRMS HOO Code: 118H0002 | Name: sw1\_ap2 | Role: Workflow Nodal Officer Approver

Collapse all | Expand all

**Declaration of custodianship for Service Book**

**SAVE' button to retain the information**

Module Type: Service Book

Cadre: Others

Parent Department: Finance

Service Type: State Government

Group: A

Type of Custodian: Centralised

Details of Custodian: Maintained centrally by an office other ...

Level: --Select Level--

Department: --Select Department--

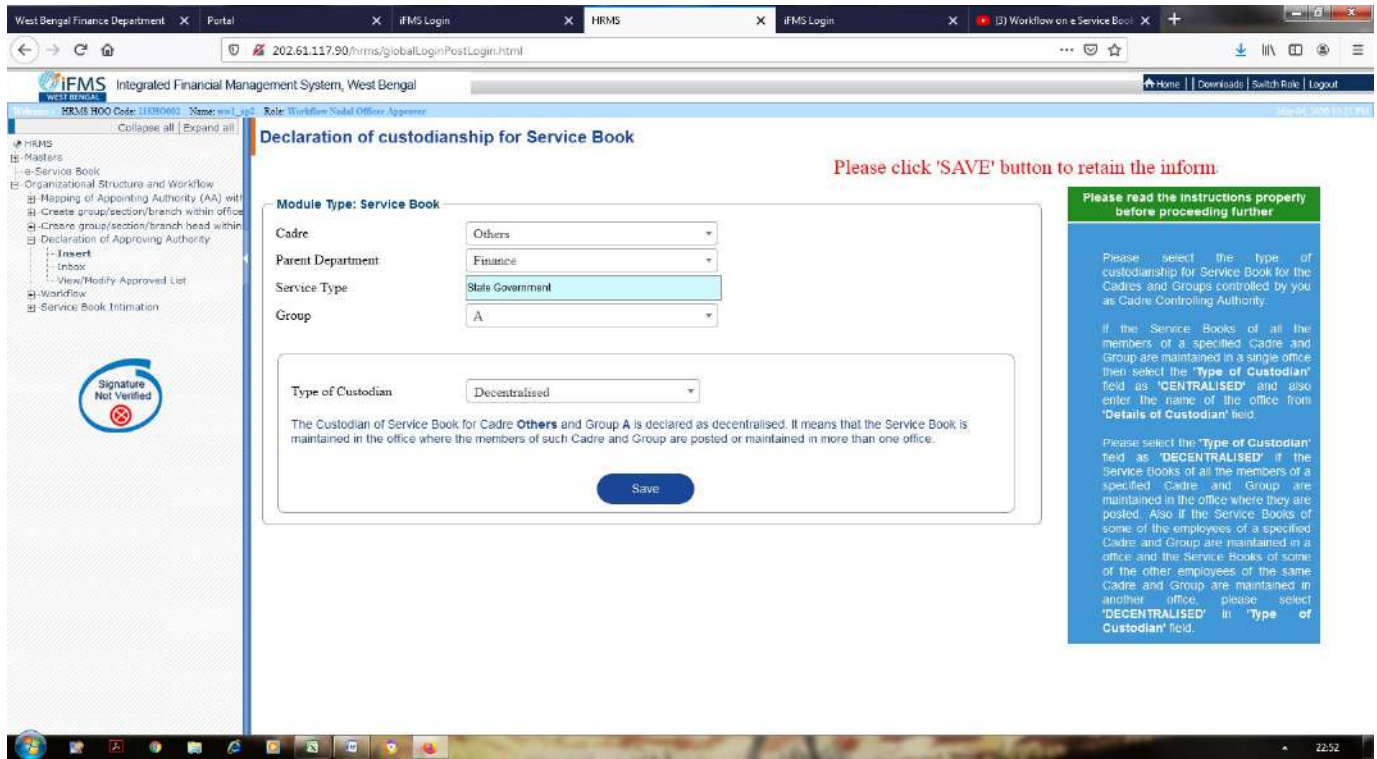
HOO: --Select HOO--

Save

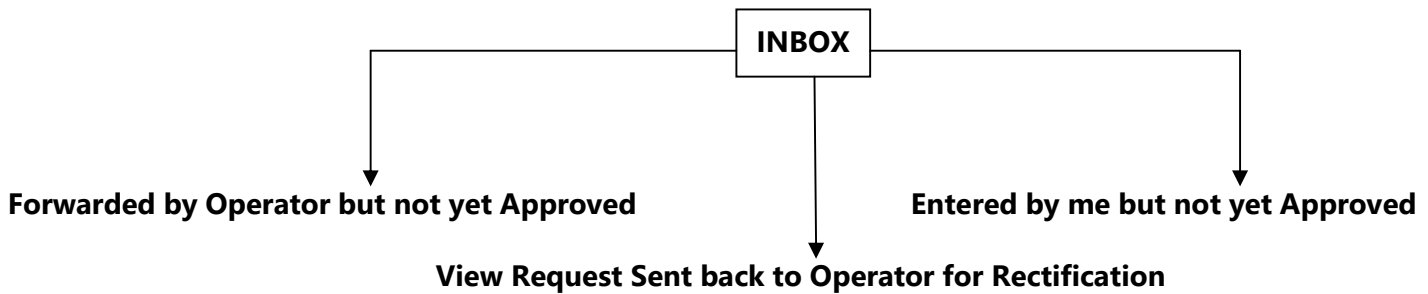
Signature Not Verified

Pic -2

[BACK](#)



Pic-3



**BACK**

**Symbol used**

Menu: - <XXX>

Button: - [xxx]

Tab: - (xxx)

**Abbreviation Used**

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Login and select **WorkflowNodal Officer Approver log in of AA/ AA Approver Role** -> Go to HRMS : click < **Organisational Structure and Workflow** > ⇨ < **Declaration of Approving Authority** > ⇨ < **View/ Modify Approved List** >

Cadre wise list of the approved authorities declared as Custodian could be viewed here and could be modified if required.

The screenshot shows the IFMS HRMS interface. The main content area displays a table titled "List of approved Custodian of Service Book". Above the table, there is a green banner with the text "Attention" and "Click any row to view details". The table has columns for Code, Parent Dept, Service Type, Group, Type of Custodian, Details of Custodian, and Description of Custodian of Service Book. The table contains 8 entries. A tooltip "To modify row, click on the hyperlink" is visible over one of the rows. The left sidebar shows the navigation menu with "View/Modify Approved List" selected. A "Signature Not Verified" warning is present in the bottom left corner of the interface.

Code	Parent Dept	Service Type	Group	Type of Custodian	Details of Custodian	Description of Custodian of Service Book
Others	FD-Finance	State Government	A	Decentralised	Maintained in the office where posted	Maintained in the office where posted
West Bengal Audit & Accounts Service	FD-Finance	State Government	A	Decentralised	Maintained in the office where posted	Maintained in the office where posted
Others	FD-Finance	State Government	C	Decentralised	Maintained in the office where posted	Maintained in the office where posted
West Bengal Excise Services	FD-Finance	State Government	A	Decentralised	Maintained in the office where posted	Maintained in the office where posted
West Bengal Registration and Stamp Revenue service	FD-Finance	State Government	A	Decentralised	Maintained in the office where posted	Maintained in the office where posted
Others	FD-Finance	State Government	D	Centralised	Maintained centrally by cadre controlling authority	FINANCE DEPARTMENT (118HC002)
West Bengal Registration and Stamp Revenue service	FD-Finance	State Government	A	Centralised	Maintained centrally by cadre controlling authority	FINANCE DEPARTMENT (118HC002)
Indian Administrative Service	FD-Finance	AIS	A	Decentralised	Maintained in the office where posted	Maintained in the office where posted

**BACK**

**NEXT**

### Symbol used

Menu: - <XXX>

Button: - [xxx]

Tab: - (xxx)

### Abbreviation Used

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## For Centralised Cadre

Login and select **WorkflowNodal Officer Approver log in of HOO/ HOO Approver Role** -> Go to HRMS : click <e-Service Book> → <Service Book Intimation> → <View/ Modify Approved List> → <Centralised (view)>.

A List is available for such Employees in favour of whom the type of Custodian of Service Books is declared as Centralised by the Cadre Controlling Authority of such Cadre(s). Click any row to view the details.

Sl No	Code	Group	Parent Department	Service Type	Intimation received from	No of employees	Custodian type
1	Others	B	LD-Land and Land Reforms and Refugee Relief and Rehabilitation	State Government	4LDA4055-OFFICE OF THE D M COOCHBEHAR	194	Maintained centrally by cadre controlling authority
2	Others	D	AM-Agricultural Marketing	State Government	4LDA4042-O/O THE DISTRICT MAGISTRATE AND COLLECTOR, HOWRAH	8	Maintained centrally by an office other than cadre controlling authority
3	Others	C	LD-Land and Land Reforms and Refugee Relief and Rehabilitation	State Government	4LDA4055-OFFICE OF THE D M COOCHBEHAR	31	Maintained centrally by cadre controlling authority
4	West Bengal General Service (Polytechnic/Pharmacy)	A	ET-Technical Education, Training & Skill Development	AICTE	4LDA4055-OFFICE OF THE D M COOCHBEHAR	2	Maintained centrally by cadre controlling authority

List of Employees whose Custodian of Service Books is of Centralised type.

**Detail**

Cadre : Others  
Parent Department : AM-Agricultural Marketing  
Group : D  
Appointing Authority : 4LDA4042-O/O THE DISTRICT MAGISTRATE AND COLLECTOR, HOWRAH

Sl No	HRMS ID	Name	Post	Designation	Service Book Maintained By
1	2012016192	Abir Sen	Agricultural Extension Officer	Agricultural Extension Officer	Centralized Office
2	2020000076	Anil Jha	Agricultural Extension Officer	Agricultural Extension Officer	Centralized Office
3	2020000077	BIMAL JANA	Agricultural Income Tax Officer	Additional Director of Agriculture (Admn)	Centralized Office
4	2019000007	K012	2nd Clerk cum Accountant	2nd Clerk cum Accountant	Centralized Office
5	2021000005	Md Kalim	2nd Clerk cum Accountant	2nd Clerk cum Accountant	Centralized Office
6	2020000079	Kanyn saha	Agricultural Extension Officer	Agriculture Extn. Officer	Centralized Office
7	2015012444	Rohit sat	Agricultural Income Tax Officer	Agricultural Income Tax Officer	Centralized Office
8	2021000006	Sagar Karar	2nd Clerk cum Accountant	2nd Clerk cum Accountant	Centralized Office

BACK

NEXT

### Symbol used

Menu: - <XXX>  
Button: - [xxx]  
Tab: - (xxx)

### Abbreviation Used

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## 3. Service Book Intimation Only for Decentralised Cadre

Once the Type of Custodian of a Cadre is declared as Decentralised, an INTIMATION will be sent by the system to the Head(s) of Office where the member(s) of that cadre are posted. The intimation shall also be available in the Workflow Nodal officer Approver log in, created in respect of the Head of Office code

Login and select **WorkflowNodal Officer Approver log in of HOO/ HOO Approver Role** ->Go to HRMS : click **<e-Service Book>**  $\Rightarrow$  **<Service Book Intimation>**  $\Rightarrow$  **<Inbox of Service Book Intimation >**  $\Rightarrow$  **[Enter]**

The screenshot shows the HRMS interface with a sidebar on the left containing navigation options like 'Family & Nominee Declaratic', 'Exit Management', and 'e-Service Book'. The main content area is titled 'Inbox for Service Book Intimation' and contains two notification cards. The left card is titled 'Cadre Controlling Authority declared you as Custodian of Service Book' and the right card is titled 'Other Head of Offices declared you as Custodian of Service Book'. Both cards include instructions to read them properly and a blue 'Enter' button at the bottom.

Left part indicates the employees who are **posted in this office** and whose Cadre Controlling Authority(s) have declared him/ her as the custodian of service book in respect of those employees

Right part indicates the employees who **are not posted in this office** but their Head of Office (s) have declared this HOO as the custodian of their Service Books.

The screenshot shows the HRMS interface with a sidebar on the left. The main content area is titled 'Inbox for Accepting/Declining Decentralized Service Book Received from Cadre Controlling Authority'. It features a blue header with instructions to read them properly and a blue 'Enter' button. Below this is a table with the following data:

Sl No	Cadre & Group	Parent Department	Intimation received from	No. of employees	Status
1	Others-C	HR- Personnel & Administrative Reforms and e-Governance	142A001-P&AR AND E-GOVERNANCE DEPARTMENT	6	Already being used by Kabindranath Biswas

Below the table, it says 'Showing 1 to 1 of 1 entries' and includes navigation buttons: 'First', 'Previous', '1', 'Next', 'Last'.

On clicking any [hyperlink row](#) INTIMATIONS would be available

**BACK**

**Symbol used**

Menu: - <xxx>

Button: - [xxx]

Tab: - (xxx)

**Abbreviation Used**

AA – Approving Authority

HOO – Head of the Office

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The screenshot shows the HRMS interface for a Nodal Officer Approver. The top header includes HRMS HOO Code: 11810002, Name: wsl\_a02, Role: Workflow Nodal Officer Approver, and the date Feb 28, 2024 12:12. The 'Details' section contains the following information:

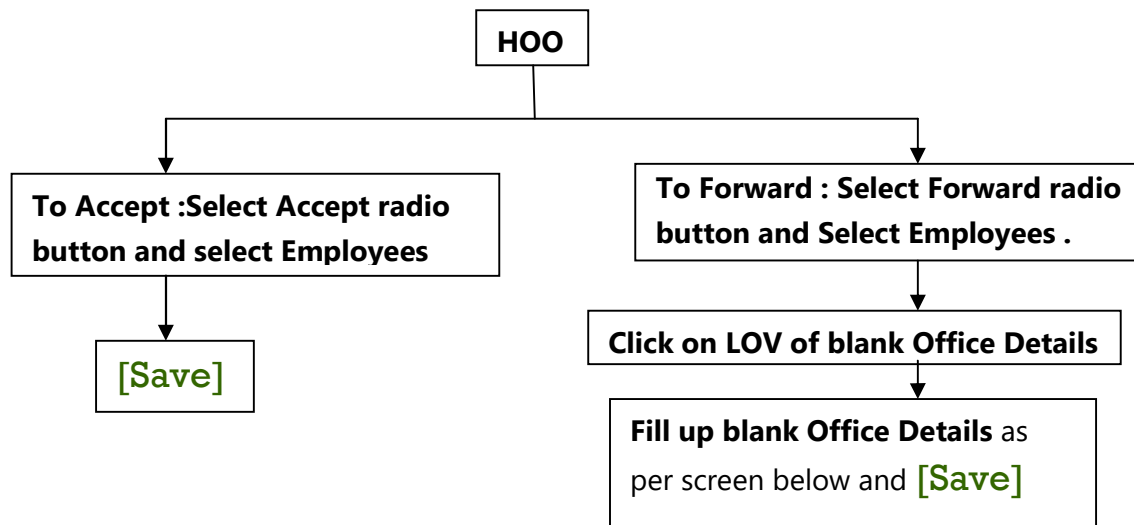
- Cadre: Others
- Employee Group: A
- Parent Department: FD-Finance
- Service Type: State Government
- Cadre Controlling Authority: 118AA002-FINANCE DEPARTMENT

Below the details are two tabs: 'Un approved list' (selected) and 'Saved list'. There are radio buttons for 'Accept' (selected) and 'Forward'. A table lists 6 employees with columns for Select (checkbox), HRMS ID, Name, Post, and Designation.

Select (SelectAll)	HRMS ID	Name	Post	Designation
<input type="checkbox"/>	1991007266	AMIYA NANDA BASAK	Personal Secretary	Personal Secretary
<input type="checkbox"/>	1983006075	DIPLAD CHATTERJEE	Administrative Officer	Administrative Officer
<input type="checkbox"/>	1985008559	GOUTAM CHANDRA CHATTERJEE	Personal Secretary	Personal Secretary
<input type="checkbox"/>	1994008336	MALAY KUMAR PAL	Personal Secretary	Personal Secretary
<input type="checkbox"/>	1991007217	TANAY KARMAKAR	Personal Secretary	Personal Secretary
<input type="checkbox"/>	1991007255	TAPAN KUMAR GHOSH	Personal Secretary	Personal Secretary

Buttons at the bottom include 'Save', 'Save & Approve', and 'Back'. The text 'Showing 1 to 6 of 6 entries' is visible at the bottom left.

In the **(Unapproved list) tab** intimations/employees shall be available in respect of whom the **HOO** is declared as the custodian of Service Book by the **CCAs** of those employees.



**BACK**

**Symbol used**

Menu: - <XXX>

Button: - [xxx]

Tab: - (xxx)

**Abbreviation Used**

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HRMS HOO Code: 118HO002 Name: wml\_ap2 Role: Workflow Nodal Officer Approver

Data Accepted Successfully.You can Find the data in Saved List Tab

Back

Details

Cadre: Others Employee Group: A

Parent Department: FD-Finance Service Type: State Government

Cadre Controlling Authority: 118AA002-FINANCE DEPARTMENT

Un approved list | **Saved list**

Accept:  Forward:

Select (SelectAll)	HRMS ID	Name	Post	Designation	Office Details
<input checked="" type="checkbox"/>	1983006075	BIPLAB CHATTERJEE	Administrative Officer	Administrative Officer	
<input checked="" type="checkbox"/>	1994008336	MALAY KUMAR PAL	Personal Secretary	Personal Secretary	
<input checked="" type="checkbox"/>	1991007255	TAPAN KUMAR GHOSH	Personal Secretary	Personal Secretary	

Showing 1 to 3 of 3 entries

Save Save & Approve Back

Fill in the **Office Details** as shown in **screen below** and **[Save]**:

Data Accepted Successfully.You can Find the data in Saved List Tab

Office Details

Department\* [ ] District\* [ ]

Level: Select Level [ ] Office Details: [ ]

Save

Suggestive list

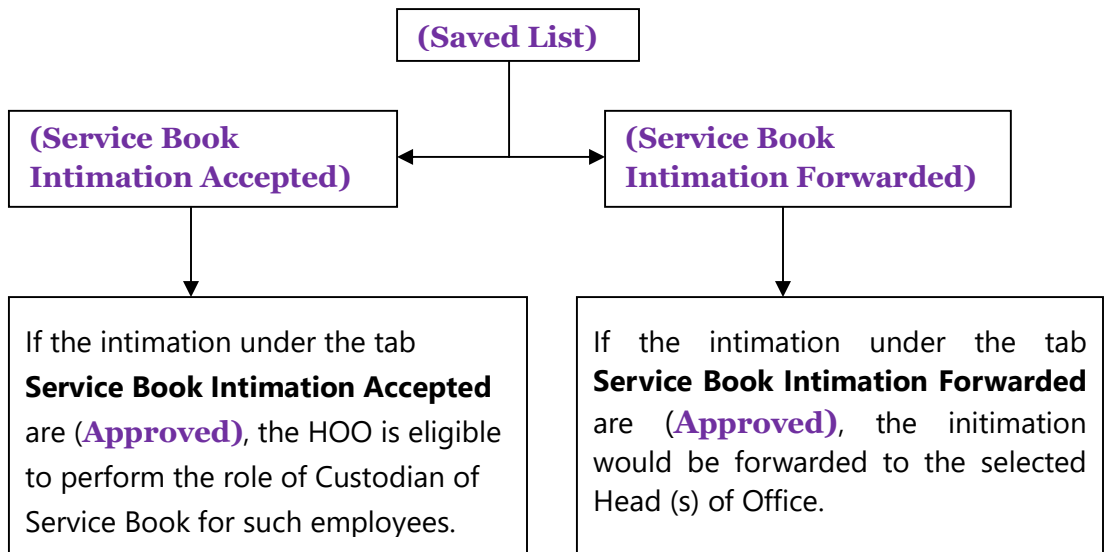
Office Details	Delete
123HO001-DEPARTMENT OF FORESTS	[ ]
142HO001-P&AR AND E-GOVERNANCE DEPARTMENT	[ ]
2FDHO00768-WEST BENGAL FINANCIAL CORPORATION	[ ]
3FDHO028-KOLKATA PAY AND ACCOUNTS OFFICE-I	[ ]
4AMHO004-OFFICE OF THE AGRICULTURAL MARKETING OFFICER (TRC), BARASAT	[ ]
4LDHO044-O/O THE DISTRICT COLLECTOR, HOBBAR	[ ]

Showing 1 to 8 of 8 entries

Under the **Saved List** tab, you will find all the saved intimations grouped either as Intimations Accepted or as Intimations Forwarded. (See diagram & Screenshot below).

**BACK**





WEST BENGAL  
 HRMS HOO Code: 118HC062 Name: nwl\_ap2 Role: WorkFlow Nodal Officer Approver  
 Feb 29, 2020 09:19 PM

**Details**

Cadre: Others Employee Group: A  
 Parent Department: FD-Finance Service Type: State Government  
 Cadre Controlling Authority: 118AA002-FINANCE DEPARTMENT

Un approved list | **Saved list**

**Service Book Intimation Accepted** | **Service Book Intimation Forwarded**

Search:

Select to Approve (Select All)	HRMS ID	Name	Post	Designation
<input type="checkbox"/>	1991007266	AMIYA NANDA BASAK	Personal Secretary	Personal Secretary
<input type="checkbox"/>	1985008559	GOUTAM CHANDRA CHATTERJEE	Personal Secretary	Personal Secretary
<input type="checkbox"/>	1991007217	TANAY KARMAKAR	Personal Secretary	Personal Secretary

Showing 1 to 3 of 3 entries

**BACK**

**NEXT**

**Symbol used**

Menu: - &lt;XXX&gt;

Button: - [xxx]

Tab: - (xxx)

**4. Workflow Chain Creation for Service Book****Abbreviation Used**

AA – Approving Authority

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**Log in using Workflow Nodal Officer Approver of HOO, if any, or as HOO Role as declared by Appointing Authority(AA) as Custodian of Service Book.**

For initiating **Workflow Chain Creation** use menu <Organisational Structure and Workflow>, <Workflow> then <Create>, under **(Workflow Chain Details)** tab select "Service Book" as the module and assign a name to it in the text box against "Insert workflow Chain Name" (See Screenshot below).

**Note:** If more than one Workflow Chain is to be created, the name should be so assigned that later on you can identify the employees to be covered by it. For example, "SB Chain for Exe Engrs" or "SB LDCs with First name A to G" or "SB Chain for JS and above" etc. There is no rule. Name them according to your convenience.

**Workflow Chain Creation**

Workflow Chain Details | Select parameter for employees to create Workflow chain

Workflow Chain Users

Workflow Description

Module: \* Service Book

Insert workflow chain name: \*

Save Refresh

**Please read the instructions properly before proceeding further**

In this screen there are only two fields namely 'Module' and 'Insert 'Workflow Chain Name'. The 'Module' field is automatically populated as per the selection made in the previous page. In the 'Insert Workflow Chain Name' field please type the name of the workflow chain as per the convenience of the user.

For better understanding please see the examples below:-

**Example 1:** A user may give the name of the workflow chain for Service Book of the employees of Cadre X Group A having name range alphabetically from A to D as 'Service Book workflow of Cadre X Group A with initials in the range of A to D'.

**Example 2:** The workflow chain for pay fixation of Cadre X Group A belonging to year of joining 1999 to 2005 may be named as 'Pay fixation for employees of Cadre X Group A whose year of joining is within the range of year 1999 to 2010'.

If it is properly saved, a success message is shown and a Request Id generated. Then click **[Next]**. (See Screenshot below)

**Chain Details Saved Successfully.**

Request Id - 20200419760043

**Workflow Chain Creation**

Workflow Chain Details | Select parameter for employees to create Workflow chain

Workflow Chain Users

Workflow Description

Module: \* Service Book

Insert workflow chain name: \* test123

Save Next

**Please read the instructions properly before proceeding further**

In this screen there are only two fields namely 'Module' and 'Insert 'Workflow Chain Name'. The 'Module' field is automatically populated as per the selection made in the previous page. In the 'Insert Workflow Chain Name' field please type the name of the workflow chain as per the convenience of the user.

For better understanding please see the examples below:-

**Example 1:** A user may give the name of the workflow chain for Service Book of the employees of Cadre X Group A having name range alphabetically from A to D as 'Service Book workflow of Cadre X Group A with initials in the range of A to D'.

**Example 2:** The workflow chain for pay fixation of Cadre X Group A belonging to year of joining 1999 to 2005 may be named as 'Pay fixation for employees of Cadre X Group A whose year of joining is within the range of year 1999 to 2010'.

**BACK**

### Symbol used

Menu: - <XXX>

Button: - [xxx]

Tab: - (xxx)

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The next tab **(Select parameter for employees to create Workflow chain)** Click **[Insert]** button. Here some parameters, viz., **"Cadre"**, **"Group"** and **"Service type"** are to be inserted.(See two Screenshots below)

**Workflow Chain Creation for :test123**

**Workflow Chain Details** Select parameter for employees to create Workflow chain

**Workflow Chain Users**

**Workflow Description**

Module: Service Book Description: test123

**Parameter Details**

Cadre	Group	Service Type	Pay Band/Scale	Grade Pay	DDO	Year of Joining From - To	Name Starts With
No data available in table							

Showing 0 to 0 of 0 entries

First Previous Next Last

**Insert** **Previous**

**Please read the instructions properly before proceeding further**

In this screen the field 'Module name' and 'Description' will be shown pre-filled based upon the module name and description entered by the user in the tab 'Workflow Chain Details'. For entering parameters click on the 'Insert' button below and enter the parameters as per the requirement. All such entries relating to a cadre and group will be shown below in 'Parameter Details'.

While entering the parameter details: you will get 9 (nine) fields namely Cadre, Group, Service Type, ROPA, Year of Joining, Year of Joining to, Treasury, DDO and Initial of Name. The fields which are marked in red asterisk are mandatory fields. These parameters relate to those employees of the office for whom the 'Workflow Chain' will be created.

**Example 1:** There are two employees belonging to Cadre X and Group Y and Service Type 'State Government'. For the employee who joined in the year 2001 the pay fixation is dealt by dealing assistant A and approver B of the office. For another employee, who joined in 1991 in the service, the pay fixation is dealt by dealing assistant C and approver D. Since the

Select the **"Cadre"**, **"Group"** and **"Service type"** and for better management, if required, some more details may be selected/entered under **(Advanced Criteria)**. Then click **[Save]**. These parameters actually determine the group of employees/officials whose Service Books would move through this chain.

**Parameter Details**

Please select the criteria (as applicable for the Cadre and Group) appropriately to create the workflow for Service Book. For example, if you are creating the workflow for Cadre X and Group Y then please select Cadre as X and Group as Y. Select the Service Type as applicable, if not automatically populated. You may also provide the ROPA, Year of Joining and Initial of name of the members of the cadre, if you want to create separate workflows relating to different ROPA, Year of Joining or Initial of Name(s).

**Cadre\*** Others **Group\*** C

**Service Type\*** State Government

**Advance Criteria**

ROPA ALL Treasury ALL DDO ALL

Year of Joining From To

Initial of name :

(You can select the first letter of the employees to create workflow chain, if required. However you can proceed without selecting the same too. For example: - Type alphabets or alphabet ranges separated by comma counting from the start of the alphabet range. For example: Type A,C, E-G etc.)

**Save**

After successfully saving the details to move on to next page click **[Next]** button. Click **[Previous]** button to go back to the previous page.(See Screenshot below)

**BACK**

## Symbol used

Menu: - <XXX>  
Button: - [xxx]  
Tab: - (xxxx)

## Abbreviation Used

AA – Approving Authority  
HOO – Head of the Office  
CCA- Cadre Controlling Authority

The screenshot shows the 'Workflow Chain Creation for :test123' interface. The 'Parameter Details' tab is active, displaying a table of parameters for employees. The table has columns for Cadre, Group, Service Type, Pay Band/Scale, Grade Pay, DDO, Year of Joining From To, and Name Starts With. The first row shows 'Others' for Cadre, 'C' for Group, and 'State Government' for Service Type. The other fields are marked as 'Parameter not entered'. Below the table are 'Insert', 'Previous', and 'Next' buttons. A right-hand panel contains instructions for entering parameters.

Cadre	Group	Service Type	Pay Band/Scale	Grade Pay	DDO	Year of Joining From To	Name Starts With
Others	C	State Government	Parameter not entered	Parameter not entered	Parameter not entered	Parameter not entered	Parameter not entered

In this step one has to assign Users at different levels in the Workflow Chain in the tab (**Workflow chain users**). After Clicking [Next] button, (**Workflow chain users**)'tab will open with Two Levels ('Top Level' and 'Level 2'). Levels can be added by clicking [Add Level After] button or to delete using [Delete Level] button. As many levels required in the office may be created, there is no restriction. However, neither the 'Top Level' can be deleted nor can level be added before it.

For the "Top Level", In the drop down menu an employee having 'Service Book Approver' Role only will be available and the desired name is to be selected to whom Service Books will reach for final Approval. User Name for the 'Top Level' is to be selected from the dropdown. As mentioned earlier only Users having 'Service Book Approver' roles will be available here. Once created, HOO Approver/ Nodal Officer Approver can modify the Top level user afterwards. [Save] the details and click [Next]

The screenshot shows the 'Workflow Chain Users' tab. It displays two levels: 'Top Level' and 'Level 2'. The 'Top Level' is selected, and a dropdown menu shows a user named 'Sankar Prasad Thakur (dst1)'. Below the dropdown are 'Save' and 'Add Level After' buttons. A right-hand panel contains instructions for adding levels.

SI No	User Name (Login ID)	Delete
1	Sankar Prasad Thakur (dst1)	[Delete]

Next, employees are to selected for the levels below the 'Top Level' to function as 'Recommending Authority' and 'Operator' and for these levels employees assigned with **Approver** and **Operator** roles will be available for selection. User has to enter 'User Name' and 'User in previous Level' in rest levels. Only users with **Approver** and **Operator** roles will be available under 'User Name' in the subsequent levels. 'User in previous Level' dropdown will be populated with last levels' 'User Name'.

BACK

## Symbol used

Menu: - <XXX>

Button: - [xxxx]

Tab: - (xxx)

## Abbreviation Used

AA – Approving Authority

HOO – Head of the Office

CCA- Cadre Controlling Authority

Workflow Chain Creation for :test123

Workflow Chain Users

Showing 1 to 1 of 1 entries

Details of Level

Two levels are incorporated in the screen by default to create the workflow chain. If you want to add more levels please click 'Add level after' or 'Add level before' as per the requirement. Please save the user details for all individual levels before going to next level leaving the screen.

Top Level: Level2, Level3

Sl No	User Name (Login ID)	User in previous level	Delete
1	--Select User--	--Select Previous Level--	

Buttons: Save, Add Level Before, Add Level After, Delete Level

For approval of the Workflow Chain(s) so created click <Inbox>. All created Workflow Chain request Ids would be available here. Click any row to view the details of that Workflow Chain. (See Screenshot below)

Request Type wise Workflow Chain Creation Inbox

Forwarded by Operator but not yet Approved | Entered by me but not yet Approved | View Request Sent back to Operator for Rectification

To modify row, click on the hyperlink

Workflow Type	Sub Module	Parameter Name	Request ID	Status	Select to Approve (Select All)	Delete
Normal	Service Book	test123	20200419760043	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	
Exception	Service Book	abc	20200316759988	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	
Normal	Service Book	qasav	20200405759265	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	
Exception	Service Book	SR	20200225753109	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	
Exception	Service Book	service book	20200225758065	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	
Normal	Service Book	1 to 4	20200225758031	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	
Exception	Service Book	exception training	20200224757950	Yet To Approve By SK, AMENA BEGUM(Approver)	<input type="checkbox"/>	

**Three options** would be available in Workflow Nodal Officer Approver <Inbox> all these are self explanatory

All the workflows thus created will be available in the Workflow Inbox grouped under **Three tabs** which are self explanatory :

- (Forwarded by Operator but not yet Approved)** :- Which is forwarded to Approver by Operator but not yet Approved.
- (Enter by me but not yet Approved)** :- which is prepared by HOO Approver but not yet approved
- (View request sent back to operator for rectification)** :- Which is already sent back to HOO operator for rectification.

Click [Approve] for Approval of the Chains.

For approval of them, select one or more Workflow Chain and Click [Approve] button at the lower part of the screen. (See Screenshot below)

**BACK**

### Symbol used

Menu: - <XXX>

Button: - [xxx]

Tab: - (xxx)

### Abbreviation Used

AA – Approving Authority

HOO – Head of the Office

CCA- Cadre Controlling Authority

**Workflow Chain Creation for test123**

Workflow Chain Details | Select parameter for employees to create Workflow chain

Workflow Chain Users

Showing 1 to 2 of 2 entries

Details of Level

Two levels are incorporated in the screen by default to create the workflow chain. If you want to add more levels please click 'Add level after' or 'Add level before' as per the requirement.  
**Please save the user details for all individual levels before going to next level/leaving the screen**

Sl No	User Name (Login ID)	Delete
1	Sankar Prasad Thakur (dst1)	

Buttons: Save, Add Level After, Previous, Approve

Use <Approved Chain> menu under <Workflow> to view all the workflow chains so far approved. Click any one of them to view its details and click [Modify Chain] button for any type of modification subject to the conditions already specified. To modify the chain in all respect. (See Screenshot below)

**Workflow Chain Creation**

Workflow Chain Details | Select parameter for employees to create Workflow chain

Workflow Chain Users

Workflow Description

Module: Service Book

Insert workflow chain name: TestFlow1

Buttons: Modify Chain, Next

Use <Deletion of Approved Chain> under <Workflow> to delete any/all approved workflow chains. If any pending task is present in the workflow attempted to be deleted, an "Error Message" would be generated.

**Request Type wise Approved Workflow Chain**

Workflow Type	Sub Module	Work Flow
Normal	Service Book	TestFlow1
Exception	ROPA 2019 Pay Fixation	Exceptional Chain for Tanay Adak
Normal	Service Book	SB
Normal	Service Book	Testing for serv1
Normal	Service Book	AAAAA
Exception	ROPA 2019 Pay Fixation	Payfixation for approver
Exception	ROPA 2019 Pay Fixation	reere
Normal	ROPA 2019 Pay Fixation	arteretretretr
Normal	ROPA 2019 Pay Fixation	To Test Approve form Backend
Normal	ROPA 2019 Pay Fixation	CIVIL DEFENCE
Normal	ROPA 2019 Pay Fixation	kd1
Normal	ROPA 2019 Pay Fixation	tes1ttt
Normal	ROPA 2019 Pay Fixation	yyyy
Normal	ROPA 2019 Pay Fixation	tttt
Normal	ROPA 2019 Pay Fixation	tyut

Showing 1 to 15 of 15 entries

**BACK**