Personal Information System, Vigilance - Operations and Supervision

Department of Posts, CSI Project
### Module Agenda

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## Module Agenda

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<th>PIS</th>
</tr>
</thead>
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</tr>
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<tr>
<td>31</td>
<td>Approve Voluntary Retirement Request</td>
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<td>32</td>
<td>Initiate Exit Process</td>
</tr>
<tr>
<td>33</td>
<td>Initiate &amp; Complete Voluntary Retirement/Resignation</td>
</tr>
<tr>
<td>34</td>
<td>Approve Voluntary Retirement Request</td>
</tr>
<tr>
<td>35</td>
<td>Complete Retirement Process</td>
</tr>
</tbody>
</table>
Overview
The objective of this training document is to comprehend and carry out the basic processes of Personnel Administration in SAP HR. *Personnel Administration* (PA) sub module helps employers to track employee master data related information.

After completion of this training, you will be able to understand the functional areas of Personnel Administration, maintain employee data, Transfer & Promotion process and execute Personnel Actions post go live.
Various Components of PIS

- Employee Exit Process
- Service Book
- Promotion Process
- Joining Process
- Confirmation Process
- One-Way / Mutual / GDS Transfer / etc
- Charge Report Process
- Deputation Process

PIS Components
Employee Joining Process
Initiate Background Verification For Candidates
Employee Joining Process

1. Enter User ID
2. Enter Password
3. Click Login
Employee Joining Process (Contd.)

4. Click HR Recruiter
5. Click count
6. Click Activities
Employee Joining Process (Contd.)

- Allegiance Constitution Certificate
- Character & Antecedent Certificate
- Community Certificate
- Date of Birth Certificate
- Educational Qualification
- Family Particulars Certificate
- Home Town Certificate
- Joining Declaration Form
- Marriage Certificate
- Medical Examination Certificate
- Professional & Technical Qualification
- Other Certificate
Employee Joining Process (Contd.)

7. Click Add
8. Click Open
9. Click Upload

10. Click OK
Issue Appointment Order
Employee Joining Process (Contd...)

1. Enter User ID
2. Enter Password
3. Click Login
Employee Joining Process (Contd...)

4. Click HR Recruiter
5. Click count
Employee Joining Process (Contd...)

6. Click Activities
Employee Joining Process (Contd...)

- Post Selection (4)
  - Segregation of Candidate to Transferring
  - Offer Accepted (To Join/To Promotion)
  - Data Transfer for New Employees
  - Health Certificate
  - Identity Certificate
  - Verification Form
  - GDS Order of Engagement
  - Verification of Character
  - Antecedents through Police
  - Oath of Allegiance
  - Medical Certificate
  - Attestation Form
  - Appointment Order (DR)
7. Click Completed

8. Click Send E-mail

9. Click OK
Employee Joining Process (Contd...)

- Verification Form
- GDS Order of Engagement
- Verification of Character
- Antecedents through Police
- Oath of Allegiance
- Medical Certificate
- Attestation Form
- Appointment Order (DR)

24.07.2015 24.07.2015
Generate Posting Order
Employee Joining Process (Contd...)

1. Enter User ID
2. Enter Password
3. Click Login
Employee Joining Process (Contd...)

4. Click Manager Self-Service

5. Click Team
6. Click **Interest of Service**
7. Click **Posting Order for Applicants**
8. Enter Applicant Id

9. Click Get List
Employee Joining Process (Contd...)

**Selection Screen**

| Applicant Id’s: | 80000626 |

**Eligible List**

<table>
<thead>
<tr>
<th>Applicant Id</th>
<th>Cadre</th>
<th>Name of the Cadre</th>
<th>Reporting Date</th>
<th>Post</th>
<th>Name of the Post</th>
<th>Office</th>
<th>Name of the Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>80000626</td>
<td>40</td>
<td>Postal Assistant(PA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Generate Posting Order**
Employee Joining Process (Contd...)

New Location Details

Name of the Division

Get Posts

List of Post & employees

<table>
<thead>
<tr>
<th>Post</th>
<th>Name of the Post</th>
<th>Employee Number</th>
<th>Name of the Employee</th>
<th>Office</th>
<th>Name of the Office</th>
<th>Cadre</th>
<th>Name of the Cadre</th>
</tr>
</thead>
<tbody>
<tr>
<td>30007901</td>
<td>Postal Assistant</td>
<td>000000000</td>
<td></td>
<td>10116038</td>
<td>Tinsukia H.O</td>
<td>40</td>
<td>Postal Assistant</td>
</tr>
<tr>
<td>30007902</td>
<td>Postal Assistant</td>
<td>30000677</td>
<td>Kakadiya Anol</td>
<td>10116093</td>
<td>Tinsukia H.O</td>
<td>40</td>
<td>Postal Assistant</td>
</tr>
<tr>
<td>30007903</td>
<td>Postal Assistant</td>
<td>30000705</td>
<td>Divan Anol</td>
<td>10116071</td>
<td>Tinsukia Division</td>
<td>40</td>
<td>Postal Assistant</td>
</tr>
<tr>
<td>30007904</td>
<td>Postal Assistant</td>
<td>30000728</td>
<td>Kapil Kan</td>
<td>10116071</td>
<td>Tinsukia Division</td>
<td>40</td>
<td>Postal Assistant</td>
</tr>
<tr>
<td>30007905</td>
<td>Postal Assistant</td>
<td>000000000</td>
<td></td>
<td>10116071</td>
<td>Tinsukia Division</td>
<td>40</td>
<td>Postal Assistant</td>
</tr>
</tbody>
</table>

Remarks: Posting Order for new joinee

10. Click Submit
11. Enter Reporting Date

12. Enter Generate Posting Date
View Joining Charge Report and Generate Employee Number
Employee Joining Process (Contd...)

1. Enter User ID
2. Enter Password
3. Click Login
Employee Joining Process (Contd…)

4. Click Manager Self-Service
5. Click Team
Employee Joining Process (Contd...)
6. Enter Applicant ID
7. Click Search
8. Click **Assuming Charge Report**

9. Click **Downloads**
Employee Joining Process (Contd...)

10. Click Upload
• **Lesson 2**

Employee Confirmation Process
Confirm Employees on Probation
Employee Confirmation Process

1. Enter User ID
2. Enter Password
3. Click Log On
4. Click Manager Self-Service
5. Click **Team**

6. Click **Probationary Period Confirmation**
### Employee Probation Confirmation

**Employee Details**

<table>
<thead>
<tr>
<th>Select</th>
<th>Emp Name</th>
<th>Emp ID</th>
<th>Date of Joining</th>
<th>Post</th>
<th>Office</th>
<th>Category</th>
<th>Selected Under</th>
<th>Genuineness Verified</th>
<th>Entry Cadre</th>
<th>Present Cadre</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rahul Sharma</td>
<td>10000558</td>
<td>01.04.2013</td>
<td>Post Master Grade I</td>
<td>GE</td>
<td>GE</td>
<td>Yes</td>
<td></td>
<td>Postmaster Grade II</td>
<td>Postmaster Grade II</td>
</tr>
<tr>
<td></td>
<td>M. Shanmugam</td>
<td>49001114</td>
<td>01.01.2012</td>
<td>Assistant Post Master</td>
<td>Accounts</td>
<td>GE</td>
<td>GE</td>
<td>Yes</td>
<td>Postmaster Grade II</td>
<td>Postmaster Grade II</td>
</tr>
</tbody>
</table>
**Employee Confirmation Process (Contd...)**

### Employee Probation Confirmation

<table>
<thead>
<tr>
<th>Cadre</th>
<th>Post Master Grade II</th>
<th>View Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extension of Probation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Removal from Service</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 7. Click check box

<table>
<thead>
<tr>
<th>Employee Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

#### 12. Click SUBMIT button.

Confirmation Order mailed successfully
Employee Confirmation Process (Contd...)

SAPconnect: Send Requests from 19.07.2015 to 20.07.2015

<table>
<thead>
<tr>
<th>Status</th>
<th>Send Met.</th>
<th>Doc. Title</th>
<th>Sender</th>
<th>Recipient</th>
<th>Send Date</th>
<th>Send Time</th>
<th>M.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Confirmation Order</td>
<td>49000091</td>
<td><a href="mailto:49001071@DOP.COM">49001071@DOP.COM</a></td>
<td>20.07.2015</td>
<td>15:59:36</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Information with Confirmation</td>
<td>SLIDHA.KANAGALA@TC, <a href="mailto:490001092@DOP.COM">490001092@DOP.COM</a></td>
<td>20.07.2015</td>
<td>10:59:00</td>
<td>71</td>
<td></td>
</tr>
</tbody>
</table>
Transfer Process
Initiate One Way Transfer
Personnel Information System

One Way Transfer Process

1. Enter User ID
2. Enter Password
3. Click Login
One Way Transfer Process (Contd...)

4. Click Employee Self-Service
5. Click Personal Information

6. Click One Way Transfer
One Way Transfer Process (Contd...)

7. Click Select Post Office
8. Click **Search Office**
One Way Transfer Process (Contd...)

9. Click Select Post

10. Click Select
One Way Transfer Process (Contd...)

11. Click Submit
Approve One-Way Transfer Request
One Way Transfer Process
One Way Transfer Process (Contd...)

1. Click Select Post to Forward

2. Click Forward
One Way Transfer Process (Contd...)

3. Click **Eligible for joining time**

4. Click **Eligible for composite grant**
One Way Transfer Process (Contd...)
5. Click Display Document
One Way Transfer Process (Contd...)

6. Click Posting Order
Initiate & Approve Rotation Transfer Request
Rotation Transfer Process

1. Enter User ID
2. Enter Password
3. Click Login
Rotation Transfer Process (Contd...)

4. Click Manager Self-Service
Rotation Transfer Process (Contd...)

5. Click Team
6. Select Cadre

7. Click Go
8. Click Submit
Rotation Transfer Process (Contd...)

1. Enter User ID
2. Enter Password
3. Click Login
Rotation Transfer Process (Contd...)

4. Click **Employee Self-Service**

5. Click **Work**
Rotation Transfer Process (Contd...)
Personnel Information System

Rotation Transfer Process (Contd...)

Application for Rotation Transfer

Last date of application submission 18.07.2015

Choice of Post (In order of preference)

- Choice 1: Postal Assistant, Mandya H.O.
- Choice 2: Postal Assistant, Srinagar H.O.
- Choice 3: Postal Assistant, Srinagar H.O.
- Request for Extension?

6. Click Submit
1. Enter User ID

2. Enter Password

3. Click Login
Rotation Transfer Process (Contd...)

4. Click Manager Self-Service
Rotation Transfer Process (Contd...)

5. Select Cadre

6. Click Go

7. Select check box

8. Click Approve
Rotation Transfer Process (Contd...)

SAPconnect: Send Requests from 16.07.2015 to 17.07.2015

Send date: 16.07.2015 to 17.07.2015
Send at: 09:00:00 to 09:00:00
Maximum No. of Hits: 500

All Send Requests

Status | Send Met. | Doc. Title | Sender | Recipient | Send Date | Send TI | M.
------|----------|------------|--------|-----------|-----------|--------|---
via Ecm. | Rotation Transfer | Anne Voice | 30000014@DOP.COM | 17.07.2015 | 12:16:59 | 6 |
via Ecm. | Rotation Transfer | Anne Voice | 30000014@DOP.COM | 17.07.2015 | 12:16:03 | 6 |
via Ecm. | Subtask Creation details of Workflow System | 10006870@DOP.COM | 17.07.2015 | 12:14:28 | 6 |
via Ecm. | Subtask Creation details of Workflow System | 10007189@DOP.COM | 17.07.2015 | 12:14:27 | 6 |
via Ecm. | Extension Request Status | Anne Voice | 10007636@DOP.COM | 17.07.2015 | 12:14:23 | 6 |
via Ecm. | Interest of Service Transfer / Posting | Anne Voice | 10006383@DOP.COM | 17.07.2015 | 12:14:05 | 73 |
via Ecm. | Interest of Service Transfer / Posting | Anne Voice | 10006383@DOP.COM | 17.07.2015 | 12:14:06 | 73 |
via Ecm. | Interest of Service Transfer / Posting | Anne Voice | 10006383@DOP.COM | 17.07.2015 | 12:14:06 | 73 |
via Ecm. | Interest of Service Transfer / Posting | Anne Voice | 10006383@DOP.COM | 17.07.2015 | 12:14:06 | 73 |
via Ecm. | Mutual Transfer Posting Order for | Anne Voice | 10007002@DOP.COM | 17.07.2015 | 12:44:45 | 73 |
Initiate Interest of Service Transfer
Interest of Service Transfer Process

1. Enter User ID

2. Enter Password

3. Click Login
4. Click **Manager Self-Service**
5. Click **Team**

6. Click **Interest of Service**
7. Click Interest of Service

8. Select Cadre
Personnel Information System

Interest of Service Transfer Process (Contd...)

[Image of search interface for Personnel Information System]
Interest of Service Transfer Process (Contd...)

9. Click Select
Interest of Service Transfer Process (Contd...)

Employee Information System

Employee Name: Ravi Shankar
Employee Number: 10000555
Name of the Office: Mandya H.O
Name of the Division: Mandya Division
Name of the Post: Sr. Postal Assistant
Name of the Office: Mandya H.O
Name of the Post: Sr. Postal Assistant
Name of the Office: Mysore H.O
Name of the Post: Postal Assistant

Eligible for joining time: [ ]
No of days: [ ]
Without availing joining time: [ ]
Eligible for composite grant: [ ]
Reason:

Add to Transfer list
Interest of Service Transfer Process (Contd...)

10. Click **Eligible for joining time**

11. Click **Add to Transfer List**
12. Click Posting Order
Initiate Mutual Transfer Request
Mutual Transfer Process

1. Enter User ID
2. Enter Password
3. Click Login
Mutual Transfer Process (Contd...)

4. Click Employee Self-Service

5. Click Personal Information
Mutual Transfer Process (Contd...)

6. Click **Employee Mutual Transfer**

7. Enter **Employee No**
Mutual Transfer Process (Contd...)

8. Click Agree with Terms and Conditions
9. Click Submit Request
Mutual Transfer Process (Contd...)

1. Enter User ID

2. Enter Password

3. Click Login
Mutual Transfer Process (Contd...)

### Initiate Mutual Transfer Request

<table>
<thead>
<tr>
<th>Initiator Employee Details</th>
<th>Mutual Transfer to be requested with Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee No</td>
<td>10007061 Aditya T M</td>
</tr>
<tr>
<td>Employee No</td>
<td>10006988 Ravi Shankar</td>
</tr>
<tr>
<td>Initiator Employee Details</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td>Aditya T M</td>
</tr>
<tr>
<td>Date of Joining</td>
<td>01.04.2005</td>
</tr>
<tr>
<td>Post</td>
<td>Postal Assistant</td>
</tr>
<tr>
<td>Cadre</td>
<td>Postal Assistant (PA)</td>
</tr>
<tr>
<td>Office</td>
<td>Srinagarpana HO</td>
</tr>
<tr>
<td>Division</td>
<td>Mandya Division</td>
</tr>
<tr>
<td>Region</td>
<td>South Karnataka Region</td>
</tr>
<tr>
<td>Circle</td>
<td>Karnataka</td>
</tr>
<tr>
<td>Date of Retirement</td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>BC</td>
</tr>
<tr>
<td>Rank in Graduation List</td>
<td></td>
</tr>
</tbody>
</table>

**Terms and Conditions**

The Mutual Transfer is subject to the following Conditions:

1. The Officials will not be entitled to any TAT/PAT/ICTE etc.
2. The seniority of the officials will be fixed under Rule 36 of P&T manual Volume IV as amended from time to time.
3. The Pay of the officials will be regulated under FR32.
4. The officials will not claim reversion of their parent divisional unit or transfer to any other Division/Unit at a later date before completion of 5 years service in the new Divisional Unit.
5. Each official should intimate the details of the above decisions to the Department of the new Divisional Unit.
4. Click **Agree with Terms and Conditions**

5. Click **Accepted**
Approve Request For Mutual Transfer
Mutual Transfer Process (Contd...)

1. Enter User ID
2. Enter Password
3. Click Login
Mutual Transfer Process (Contd...)

4. Click Work
Mutual Transfer Process (Contd...)

5. Click Forward
Mutual Transfer Process (Contd...)

[Image of mutual transfer process form]

- Rank in Gradation List
- No. of years in the Post
- Probation Status
- No. of times transfer under Mutual/One way
- Mode of Recruitment
- Representation by Employee
- Remarks
- Forward to next Level:
  - Select Post to Forward
- Previous Remarks:
  - Office
  - Approval Date
  - Remarks
- Eligibility:
  - Eligible for joining time
  - Without availing joining time
  - Eligible for composite grant

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Initiate Temporary Transfer Request
Temporary Transfer Process

1. Enter User ID
2. Enter Password
3. Click Login
4. Click Employee Self-Service
5. Click Personal Information

6. Click Temporary Transfer
Temporary Transfer Process (Contd...)

7. Click Select Post Office
Temporary Transfer Process (Contd...)

8. Click **Search Office**
Temporary Transfer Process (Contd...)

9. Click Select Post

10. Click Select
Temporary Transfer Process (Contd...)

11. Click Submit
Approve Request For Temporary Transfer
Temporary Transfer Process

1. Click **Work**
Temporary Transfer Process (Contd...)

2. Click **Select Post to Forward**

3. Click **Forward**
Temporary Transfer Process (Contd...)

1. Enter User ID
2. Enter Password
3. Click Login

Sign in to your India Post account

<table>
<thead>
<tr>
<th>Subject</th>
<th>From</th>
<th>Sent Date</th>
<th>Priority</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>N RAJASEKHAR's request for One Way Transfer Posting Order</td>
<td>Today</td>
<td>Jun 26, 2015</td>
<td>Medium</td>
<td>New</td>
</tr>
</tbody>
</table>

Aditya T M's Temporary Transfer Request for processing

Sent Date: Today by TM, Aditya
Priority: Medium
Temporary Transfer Process (Contd...)

4. Click **Eligible for joining time**

5. Click **Eligible for composite grant**