

**Odisha e-Municipality**

**Welfare Scheme Management System**

**Version 1.0**

**Training Manual**

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## About This Manual

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### Purpose

This manual has been written to help you understand and use the Welfare Schemes Management System application. It presents the functional capabilities and operational details of the System, and contains the procedures that you should know for performing your business tasks using Welfare Schemes Management System.

### Intended Audience

This manual is primarily intended for the officers who will use the Welfare Schemes Management System application to manage the Schemes and Beneficiary details.

### Prerequisites for Use

Following are the prerequisites for understanding this manual:

**Functional** – Basic understanding of current system for Welfare Schemes Management process and related areas is required.

**Technical** - Basic understanding of Windows and GUI operations. You are expected to be familiar with operations such as using the mouse and keyboard to select, click or choose menu options and buttons and enter values in text boxes.

### Organization of the Manual

This manual is organized as follows:

**Introduction** provides an overview of Welfare Schemes Management System.

**Getting Started** takes you on a quick tour of Welfare Schemes Management System. It gives a brief introduction about the general working features of Welfare Schemes Management System that you should keep in mind while working.

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## 1. Getting Started

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### 1.1 Introduction

The Welfare Schemes Management System application will help you to get an overview of the Welfare Schemes Management process of the urban local bodies (ULB). The objective is to automate the process of Welfare Schemes Management of eMunicipality.

### 1.2 Features of Welfare Schemes Management System

The proposed system will carry the following features

- Manage different Schemes
- Manage different Components
- Manage different Trade
- Manage Individual beneficiary details and maintain the database for the same
- Manage Group beneficiary details
- Facility to maintain the complete process for Action Plan and Expenditure Plan
- Maintain the details of Grants received
- Maintain the payment details for different Schemes
- Manage the reports

Access to the Welfare Schemes Management System application is limited only to authorize Trainings. To use it, you must first log on to eMunicipality System using your Training ID and password. On logging in, Welfare Schemes Management System allows you to start any of the modules to which you have access rights.

### 1.3 Log In to Welfare Schemes Management Module

Login to the Welfare Schemes Management System of the ULB

- Step – 1 Open the Link of e-Municipality
- Step – 2 Go to your specific ULB
- Step – 3 Click “Employee Login”
- Step – 4 Give your user credentials
- Step – 5 Place the Mouse on Welfare Schemes

### 1.4 Add New Scheme

This feature helps the user to enter a new Scheme which will be implemented in the ULB.

- Step – 1 Login as a user with role as Welfare Officer
- Step – 2 Navigate to the Welfare Schemes -> Scheme Master -> Scheme ->Add from the menu.
- Step – 3 Fill up all the details
- Step – 4 Click on “Save Scheme” button.

### 1.5 Add New Component

This Feature helps the user to add a new Component which will be implemented in the ULB.

- Step – 1 Navigate to the Welfare Schemes -> Scheme Master -> Component ->Add from the menu.
- Step – 2 Fill up all the details
- Step – 3 Click on “Save Component” button

### 1.6 Add New Trade

This Feature helps the user to add a new Trade which will be implemented for a Scheme in the ULB.

- Step – 1 Navigate to the Welfare Schemes -> Scheme Master -> Trade ->Add from the menu.
- Step – 2 Fill up all the details
- Step – 3 Click on “Save Trade” button

### 1.7 Map Components with Scheme

With this Feature the user can map different Components with a Scheme.

- Step – 1 Navigate to the Welfare Schemes -> Scheme Master -> Scheme-Component from the menu.
- Step – 2 Select the Scheme from the dropdown for which mapping has to be done
- Step – 3 Select the Component which has to be mapped with the Scheme.
- Step – 4 Click „Add New Row” to add multiple Components to the Scheme.
- Step – 5 Click on the “Save” button to save the mapping of the Scheme and Component.

### 1.8 Map Trade with Components

With this feature the user will be able to map the different Trades with the Components.



- Step – 1      Navigate to the Welfare Schemes -> Scheme Master -> Trade-Component -> Add from the menu.
- Step – 2      Select the „Component“ for which mapping has to be done from the dropdown.
- Step – 3      Select the Trades which are to be mapped, by clicking the corresponding checkboxes.
- Step – 4      Click the “Submit” button to save the mapping details.

### 1.9 Add Individual Beneficiary

With this feature the user will be able to add the beneficiaries who will avail the benefits of the Scheme.

- Step – 1      Navigate to the Welfare Schemes -> Beneficiary -> Individual Beneficiary -> Add from the menu.
- Step – 2      Fill up all the details of the beneficiary
- Step – 3      Click on „Save“ button to save the details.

### 1.10 Add Group Beneficiary

This feature helps the user to add Groups consisting of beneficiaries.

- Step – 1      Navigate to the Welfare Schemes -> Beneficiary -> Group -> Add from the menu.
- Step – 2      Fill up all the details
- Step – 3      Click on „Save“ button to save the details

### 1.11 Map Beneficiaries to the Group

This Feature helps the user to map the different beneficiaries to a group.

- Step – 1      Navigate to the Welfare Schemes -> Beneficiary -> Group -> Search from the menu.
- Step – 2      Search the Group to which beneficiaries have to be mapped.
- Step – 3      Clicks on „Map/Un-Map Beneficiary“ button
- Step – 4      Click on „Search Beneficiary“ button in Beneficiary List screen
- Step – 5      Select the beneficiaries who will form the Group by clicking the checkbox.
- Step – 6      Click the „Save Beneficiary Map“ button to save the mapping between the group and beneficiaries

### 1.12 Add Group Proposal

With this Feature the user can add details of the proposal of the Group.

- Step – 1      Navigate to the Welfare Schemes -> Beneficiary -> Group Proposal -> Add from the menu.
- Step – 2      Fill up all the details
- Step – 3      Click on „Save Group Proposal“ button to save the details

### 1.13 Prepare Action Plan for the FY Year

- Step – 1      Navigate to the Welfare Schemes -> Application -> Action Plan -> Add
- Step – 2      Select the FY Year from the dropdown.
- Step – 3      Select the Scheme for which Action Plan has to be prepared.
- Step – 4      Select the Component of the Scheme for which Action Plan has to be prepared.
- Step – 5      Enter all the details of the Component and the Component Remarks
- Step – 6      Enter the Action Plan Remarks
- Step – 7      Click on „Save“ to save all the details entered for the Component
- Step – 8      Click on „Next Component“ button to fill up the details for another component under the  
Action Plan
- Step – 9      Repeat Step – 5 to 7 for the second Component
- Step – 10     Repeat steps – 5 to 7 for all the Components mapped to the Scheme for the particular FY  
Year
- Step – 11     After saving the details of all the Components, click on „Submit“ button to forward the Action  
Plan to SIO

### 1.14 Action Plan Approval

This feature helps the user to approve the Action Plan prepared by the Welfare Officer for the particular FY Year. In case any modifications have to be made in the Action Plan, then the same can be returned back to the Welfare Officer.

- Step – 1      .Login as Slum Improvement Officer
- Step – 2      Navigate to the Welfare Schemes -> Application -> Action Plan -> Worklist from the menu
- Step – 3      Search the Action Plan for the particular FY Year
- Step – 4      Click on „Modify Action Plan“ button.
- Step – 5      Enter the Component Remarks and the Action Plan Remarks
- Step – 6      Click on „Save Remarks“ button
- Step – 7      Click on „Next Component“ button to select the next component
- Step – 8      Repeat Step – 5 to 6
- Step – 9      After entering the remarks for all the Components and the Action Plan, click on „Approve“  
button to approve the Component and forward it to next approval authority
- Step – 10     Login as Commissioner/ Executive Officer to complete the next approval flow. Repeat steps  
– 2 to 9
- Step – 11     Login as Mayor/ Chairman to complete the next approval flow. Repeat steps – 2 to 9

## 1.15 Capturing Offline Details

This Feature helps the user to capture the offline details.

- Step – 1      Navigate to the Welfare Schemes -> Application -> Action Plan -> Worklist from the menu.
- Step – 2      Search the Action Plan for which offline message has to be captured.
- Step – 3      Click on „Save Offline Message“ button to capture the offline message.
- Step – 4      Select the FY Year, Scheme and Component from the dropdowns
- Step – 5      Enter the Offline Message
- Step – 6      Enter the Action Plan Remark and the Component Remark
- Step – 7      Click on „Next Component“ button and save the Component Remark for all the components
- Step – 8      Click on „Save Offline Message“ button
- Step – 9      After saving the Component Remarks for all the Components, click on „Approve“ message
- Step – 10     Now the Offline Message for Corporation Meeting has to be captured
- Step – 11     Once the corporation meeting is over, repeat steps – 1 to 9

## 1.16 Prepare the Expenditure Plan for the FY Year

With this Feature the user can return create the Expenditure Plan after the final Allotment amount is received

- Step – 1      Navigate to the Welfare Schemes -> Application -> Expenditure Plan -> Add from the menu.
- Step – 2      Select the FY Year, Scheme and Action Plan ID from the dropdowns.
- Step – 3      Modify the details if required.
- Step – 4      Enter the Expenditure Plan Remarks and Component Remarks
- Step – 5      Click on „Save“ button to save the details of the Component
- Step – 6      Click on „Map Group“ button to map the Groups to the Expenditure Plan
- Step – 7      After the mapping is complete, the „Group Mapped Successfully“ message will be displayed
- Step – 8      After saving the details of all the components, click on „Submit“ to forward the Expenditure Plan to next approval authority (Slum Improvement Officer)

## 1.17 Expenditure Plan Approval

This feature helps the user to approve the Expenditure Plan prepared by the Welfare Officer for the particular FY Year. In case any modifications have to be made in the Expenditure Plan, then the same can be returned back to the Welfare Officer.

- Step – 1      Login as Slum Improvement Officer
- Step – 2

- Navigate to the Welfare Schemes -> Application -> Expenditure Plan -> Worklist from the menu
- Step – 3 Search the Expenditure Plan for the particular FY Year
- Step – 4 Click on „Modify Expenditure Plan Status“ button.
- Step – 5 Enter the Component Remarks and the Expenditure Plan Remarks
- Step – 6 Click on „Save Remark“ button
- Step – 7 Click on „Next Component“ button to select the next component
- Step – 8 Repeat Step – 5 to 6
- Step – 9 After entering the remarks for all the Components and the Expenditure Plan, click on „Approve“ button to approve the Component and forward it to next approval authority
- Step – 10 Login as Commissioner/ Executive Officer to complete the next approval flow. Repeat step – 2 to 9
- Step – 11 Login as Mayor/ Chairman to complete the next approval flow. Repeat step – 2 to 9
- .

### 1.18 Capturing Offline Message after approval from ADM

With this feature the user will be able to capture the offline message after the ADM approves the Expenditure plan

- Step – 1 Navigate to the Welfare Schemes -> Application -> Expenditure Plan -> Worklist from the menu.
- Step – 2 Search Expenditure Plan for which the offline message has to be captured
- Step – 3 Click on „Save Expenditure Plan Offline Status“ button to capture the offline message received from the ADM.
- Step – 4 Fill up the Expenditure Plan Remarks and Component Remarks.
- Step – 5 Click on „Save Offline Remark“ to save the Remarks for all the Components
- Step – 6 Click on „Approve“ button after saving the details for all the components

### 1.19 Logging Out

With this feature the user will be able to logout from Welfare Schemes Application

- Step – 1 Click “logout”

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