



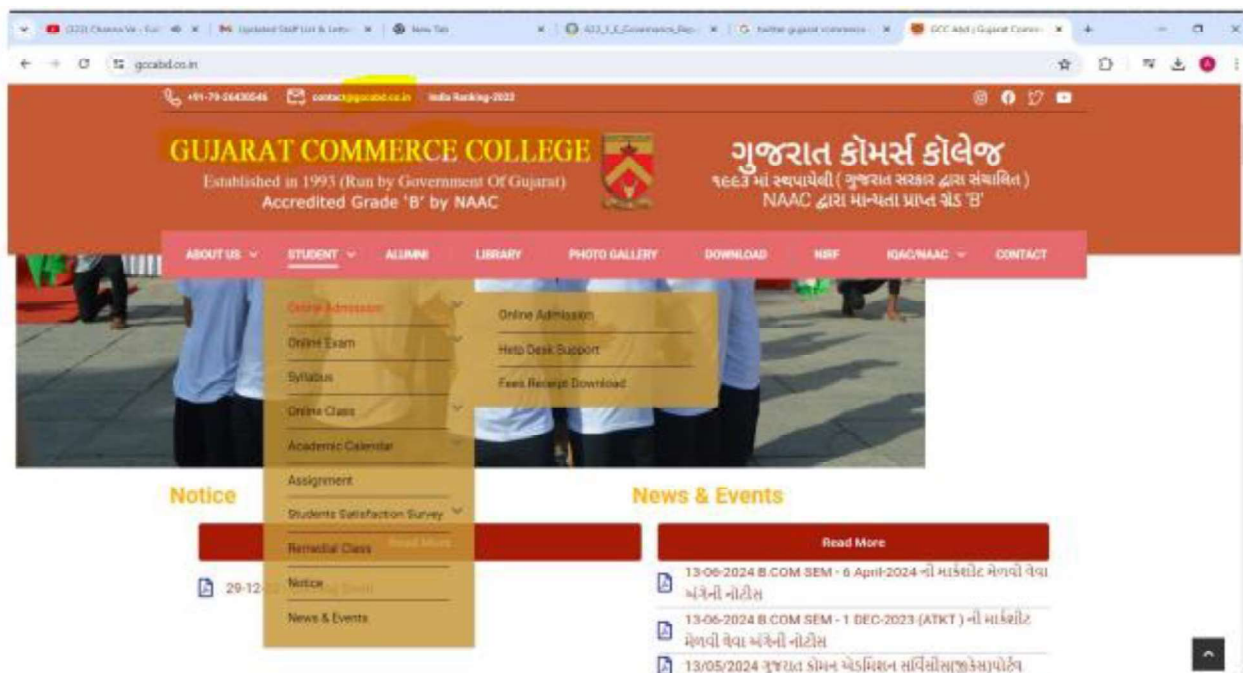
**GUJARAT COMMERCE COLLEGE (Morning)**  
Ellisbridge, Ahmedabad-6  
(Department of Education, Government of Gujarat)  
ISO 9001:2008 Certified & Accredited Grade 'B' by NAAC  
(Tel): 079 26430546 Website: [gccabd.co.in](http://gccabd.co.in)



**1. Screen shot of User interface of each module reflecting the name of HEI along with E-governance report of the college for FY 2023-24**

This college promotes the E-governance in all of its functional aspects. Hence e-governance is our prime concern to promote the transparency and fairness in our functioning. Compliances of E-governance can be observed in functional aspects in the following manner:-

- (i) **Admission:** All information related to admission is displayed on the website including rules and regulations, University and state government guidelines, key dates, application procedures, eligibility criteria and fee etc. Presently Admission to this college is done through the online Government of Gujarat Portal.(GCAS Gujarat Common admission portal).





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**Gujarat Common Admission Services (GCAS)**  
Education Department, Government of Gujarat

English

Already Registered

Apply Now

## NOTIFICATION of LLB. Admissions will be p



BACHELOR OF  
COMMERCE

BACHELOR OF  
SCIENCE

BACHELOR OF BUSINESS  
ADMINISTRATION

BACHELOR OF  
COMPUTER APPLICATION



MASTER OF ARTS

MASTER OF  
COMMERCE

MASTER OF SCIENCE

MASTER OF LAWS

MASTER OF  
EDUCATION



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## Gujarat Common Admission Services Portal – GCAS

### Summary Report

Date: 11/04/2024

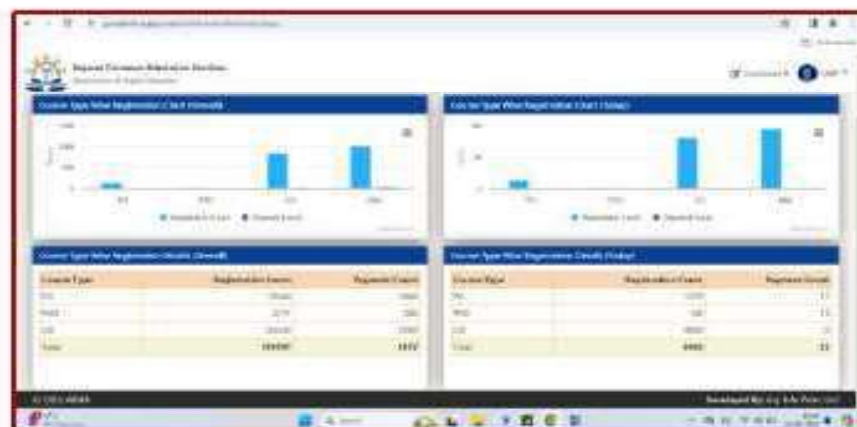
Time: 06:00 pm

#### 1. Registration details by course type as of 11/04/2024

Sr. No.	Course Type	Registration Count	Payment Count
1.	PG	1270	17
2.	Ph.D.	140	15
3.	UG	8026	0
Total		9436	32

#### 2. Registration details by course type (Overall)

Sr. No.	Course Type	Registration Count	Payment Count
1.	PG	15044	1666
2.	Ph.D.	2211	206
3.	UG	84342	2285
Total		101597	4157





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- (ii) **Administration** :- College strictly follows the rules and regulation of the government of Gujarat which is readily available on the government portal. All function of the HR is done through the Cogent portal which is also repository for teaching and non-teaching staffs. All personal information like leave details, qualification, promotion, pay level etc are maintained through the cogent portal. College level committee are displaying their activities on the website for wider publicity.

UDAYAM COGENT

Higher & Technical Education  
Education Department  
Government of Gujarat

Home Circular Help Contact

Hello, ANJANI KUMAR

Gujarat Commerce College, Ellisbridge (Faculty)

**Administrative**

NOC

Leave Management

HRMS (General)

Training

Document Repository

**Academic**

**Key Initiatives**

PANCHPRAKALP

INNOVATION CLUB



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registration.gujgov.edu.in/db.jsp

UDAYAM COGENT

Higher & Technical Education  
Education Department  
Government of Gujarat

Home

Circular

Help

Contact

Hello, Niravkumar

Gujarat Commerce College, Ellisbridge(Fees Validator)

Administrative

Academic

Fees Verification

Form Verification



# GUJARAT COMMERCE COLLEGE (Morning)

Ellisbridge, Ahmedabad-6

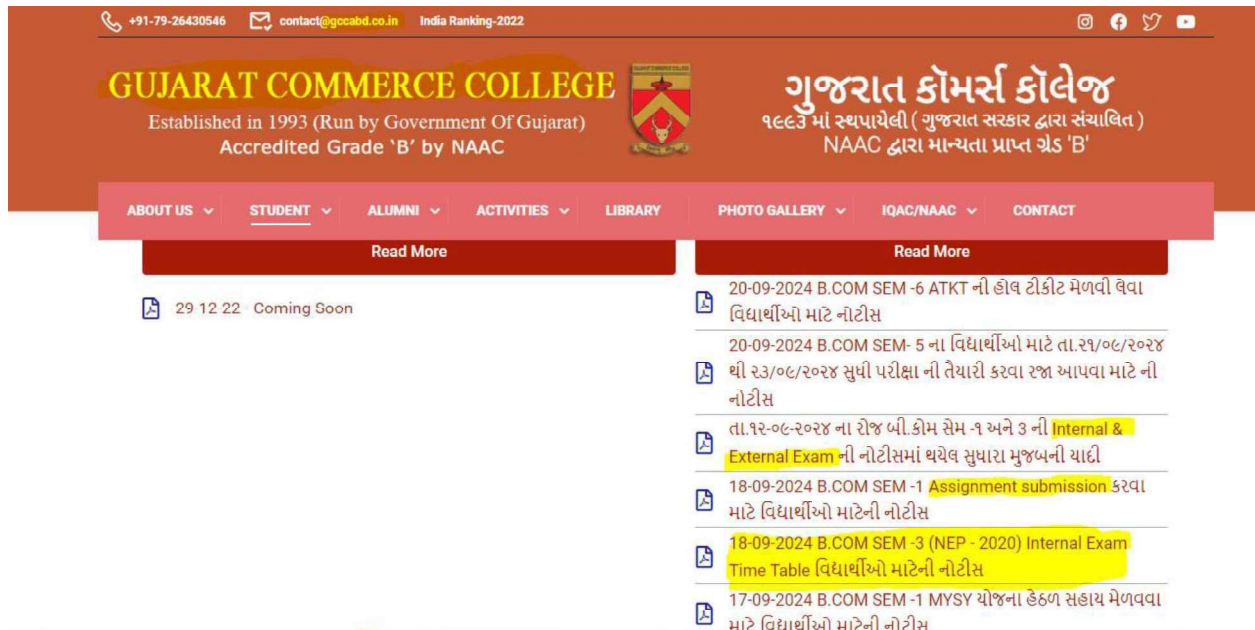
(Department of Education, Government of Gujarat)

ISO 9001:2008 Certified & Accredited Grade 'B' by NAAC

(Tel): 079 26430546 Website: [gccabd.co.in](http://gccabd.co.in)



- (iii) **Examination** :-All information related to examination is readily available on the website well in advance. Assignment submission and evaluations are done on the online basis. Information regarding the internal examination is provided on the website as per academic calender. Admit card, fee receipt and other information regarding the examination is available on the college website on regular interval. During corona Pandemic we conducted online exam successfully as per the Gujarat University norms.





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# GUJARAT UNIVERSITY

योग: कर्मसु कौशलम्

● NOTABLE ALUMNI



Shri Hargovind Trivedi  
Indian Nephrologist

STUDENT - EXAMINATION - RESULT -

## Office Register (O.R.)

Year \*

Month \*

Course Name \*

[View](#)

PAGE :1506

B.Com. Semester-6 Reg Exam APR-2023

APR-2023

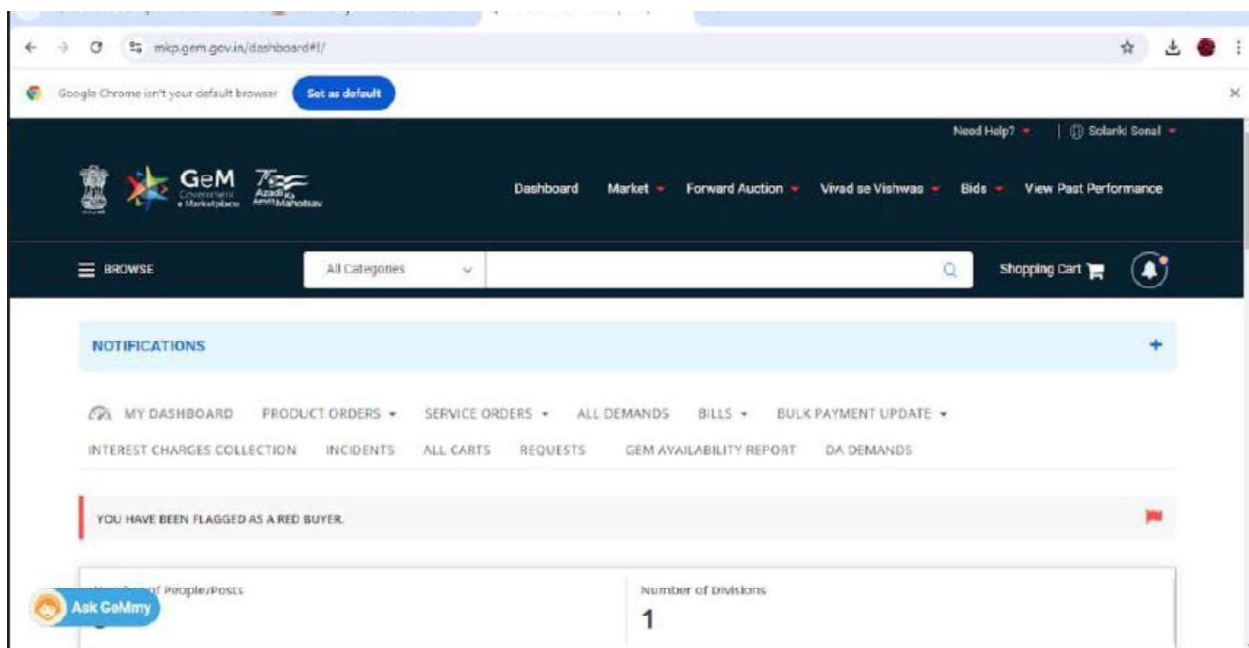
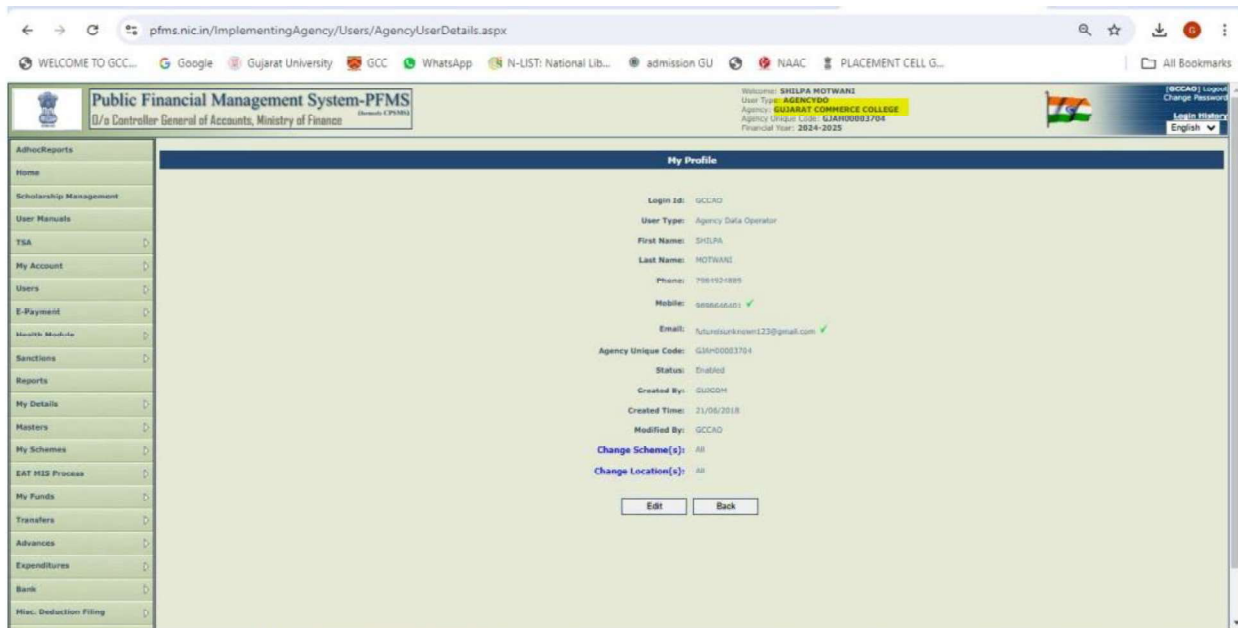
B.COM. SEMESTER-6																
Enrol.No.	SeatNo.	Name										Colg.	Cntr.	Wh-Pt-Combi.		College
#	Marks of this Subject will not be considered for Class or Total.	CC	CC	CC	CE	CC	CE	CE	#FC	#SS			Tot. for Class			
		306	307	308	309	310	303	304	302	302						
		Ind.	Fund		Comm		Fund	Core	Core	Foun	Soft	Sem	Sem	Sem		
		Busi	ame.	Busi	er.	Fund	Core	Core	ion	Skill	-5	-6	-6		Gr	
		Eco.	Fin.	Laws	uni.	Stat	ive	ive	Cou	Cou	al	al	GT	Uni.	nd	
		Envl	Mgmt	-II	-IV				rse	rse			Exam	al		
Result																
	External Max.->	70	70	70	70	70	70	70			490	490	700	980	1400	
	External Min.->	25	25	25	25	25	25	25								
	Internal Max.->	30	30	30	30	30	30	30	100	100	210	210				
	Internal Min.->	11	11	11	11	11	11	11	36	36						
202003117238	10	RANA AADITYA RASHMIKANT							208		1	1	0100000	GUJ COM		
	10	43	32	39	48	25	47	35			237	269	412	506	773 SECOND	
	10	20	19	19	20	20	19	26	56	52	124	143			Mgmt.Acc-II & Aud.-II	
202003117285	70	F SACHALA AANSHI TARAKBHAI							208		1	1	0100000	GUJ COM		
	70	44	44	59	51	43	57	44			320	342	493	662	952 FIRST	
	70	19	21	23	20	21	21	26	88	62	139	151			Mgmt.Acc-II & Aud.-II	
202003117292	100	SANDHI AASHIKBHAI AKBARBHAI							208		1	1	0100000	GUJ COM		
	100	44	37	44	38	38	67	42			326	310	441	636	888 FIRST	
	100	19	17	20	18	17	18	22	42	46	121	131			Mgmt.Acc-II & Aud.-II	
202003117251	108	F RATHOD AASHTHABEN KANJIBHAI							208		1	1	0100000	GUJ COM		
	108	31	28	46	47	25	36	27			225	240	371	465	715 PASS	
	108	18	17	22	20	17	14	23	58	46	119	131			Mgmt.Acc-II & Aud.-II	
202003116943	120	F MIRCHANDANI AASTHA RAJESHBHAI							208		1	1	0100000	GUJ COM		
	120	34	30	42	58	16	26	26			308	232	364	540	801 SECOND0140	
	120	17	20	19	19	16	19	22	88	50	129	132			Mgmt.Acc-II & Aud.-II	
	120	9														
202003117176	123	F POPAT AASTHABEN NAYANBHAI							208		1	1	0100000	GUJ COM		
	123	42	32	45	45	25	44	40			249	273	409	522	784 SECOND	
	123	19	18	22	21	18	20	18	44	54	126	136			Mgmt.Acc-II & Aud.-II	



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- (iv) **Finance and Accounts:** All payment to the college staff and vendor is done through IFMS/PFMS portal. In PFMS portal other facilities like budgeting planning audit trail facility are there. Most of the procurement of goods and services for this college is done through GEM portal as per the GFR procedure. It ensure online bidding process for every procuremet which is cost effective and transparent.





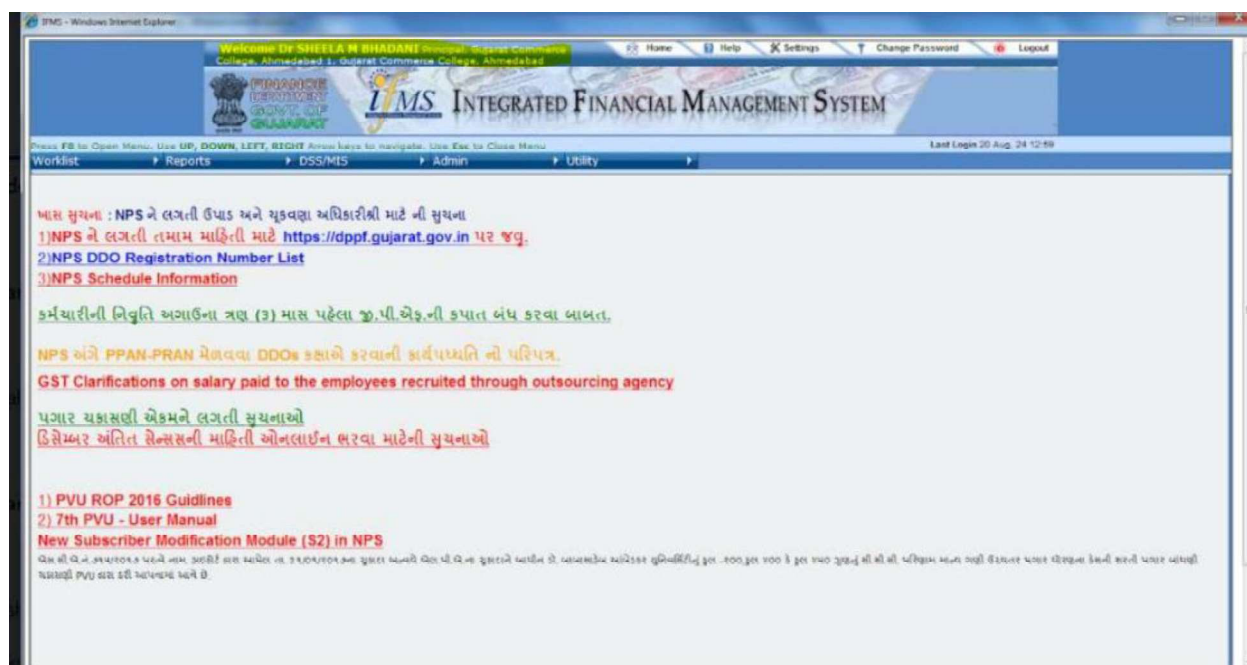
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Financial Year 2020-2021

English ગુજરાતી A+ A A- Log Out

**Gujarat State SCHOLARSHIP PORTAL**

Project Admin Post Matric Scholarship Tablet Distribution Report MIS Help Utility

Office: Gujarat Commerce College ( ) User Name: JYOTSABEN I PATEL Designation: (9265788747) Last Login: 16/08/2024 11:55:54

**PFMS PostMatric Bill UTR Details**

Select Department	Select Scheme	
Director Scheduled Caste Welfare	POST-MATRIC SCHOLARSHIP-SCs	
District	School/College List	Response Status
Ahmadabad	Gujarat Commerce College	Accept
<input type="button" value="Search"/> <input type="button" value="Export to Excel"/>		

- (v) **Online library resources :-** In our library various software are available to provide the online resources to the student for study and research.



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OPAC

Simple Search | Boolean Search | Advanced Search | Member OPAC

Transactions -> Book -> Simple Search

Simple Search

Search By: Author - sharma 30 - Show Result  
Material Type: - ☐ Any where in word ☐ Exact Search Reset

Select	Accession No	Title	Author	Location	Status	Call No	Subject
<input type="checkbox"/>	000822	Statistics For Management	Sharma, Anand	Main Library - C	Availal	650/51	Statistics For Manag
<input type="checkbox"/>	001080	Quantitative Techniques For Decisio	Sharma, Anand	Main Library - C	Availal	650.3/	Quantitative Techno
<input type="checkbox"/>	001214	China And India In The Age Of Glob	Sharma, Shalendra	Main Library - C	Availal	903.48	China And India in 1
<input type="checkbox"/>	003298	Leadership Lessons	Sharma, Dheeraj	Main Library - C	Availal	658.41	Leadership Lessons
<input type="checkbox"/>	003337	State Of Indias Livelihoods Report 25	Sharma, Vipin	Main Library - C	Availal	636.95	State Of Indias Livel
<input type="checkbox"/>	003447	Love Your Mondays And Retire Your	Sharma, Siddharath	Main Library - C	Availal	363/54	Love Your Mondays
<input type="checkbox"/>	004175	Modern Banking And Working Capit	Sharma, Dheeraj	Main Library - C	Availal	332.10	Modern banking An
<input type="checkbox"/>	004627	Sanyasi Jemne Potani Sampat Vechi	Sharma, Robin	Main Library - C	Availal	913.54	Sanyasi Jemne Pota
<input type="checkbox"/>	004631	Charkya Temna Updesh Ane Sikshan	Sharma, Ashwin	Main Library - C	Availal	320.1/	Charkya Temna Lipi
<input type="checkbox"/>	004635	Mahanta Na Mangdarshak-2	Sharma, Robin	Main Library - C	Availal	158.1/	Mahanta Na Mangd
<input type="checkbox"/>	004636	Netrutvanu Shangan	Sharma, Robin	Main Library - C	Not Av	658.42	Netrutvanu Shangan
<input type="checkbox"/>	004639	Mahanta Na Mangdarshak	Sharma, Robin	Main Library - C	Availal	158.1/	Mahanta Na Mangd
<input type="checkbox"/>	007737	Fundamentals Of Accounting	Sharma, C.D.G.	Main Library - C	Availal	637/59	Fundamentals Of Ac
<input type="checkbox"/>	009128	Study Package For The Cat Online	Sharma, Anur	Main Library - C	Availal	001/54	Study Package For 1

MARCOML (Export) Select All Clear Show Next

(vi)

(vii)

(viii)

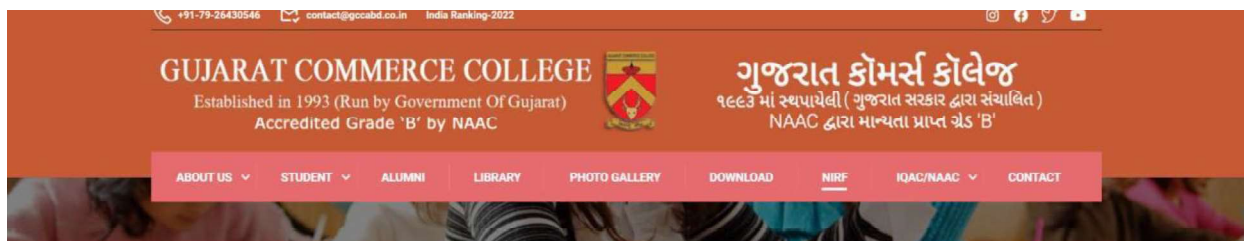
(ix)



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(vi) College website is updated at regular interval to provide the details regarding the faculties, non faculty, and its activities all stakeholder.



Home » NIRF Ranking

Sr No	NIRF Ranking	Document Download
1	NIRF Ranking 2022	<a href="#">Download Pdf</a>
2	NIRF Ranking 2023	<a href="#">Download Pdf</a>
3	NIRF DCS 2023-24 COLLEGE Category	<a href="#">Download Pdf</a>



Home » About GCC

### A FEW WORDS ABOUT US

Gujarat commerce college has been one of oldest and historical colleges of Gujarat state also popular as one of the vibrating places during our struggle for Independence, though designed and established in the year 1860 by British Colonizers its patron being very much Indian, Honorable Sir Chinubhai Baronet. Its great and vivid history is very much reflected on the ambience and heritage college buildings spread across the campus, run now under the aegis of the government of Gujarat.



  
PRINCIPAL  
GUJARAT COMMERCE COLLEGE  
Ahmedabad.



# **COGENT**

## **Human Resource Management System (HRMS) User Manual (for Faculty)**

### Higher and Technical Education Department



#### ADDRESS

Knowledge Consortium of Gujarat (KCG),  
Pragna Puram Campus, Opp. PRL, Between  
Govt. Girls Polytechnic and LD College of  
Engineering, Navrangpura, Ahmedabad.



#### CONTACT

Hemant Joshi - 9979100152



#### EMAIL

[info@guigov.edu.in](mailto:info@guigov.edu.in)



## CONTENTS

Sr. No	Title	Page No.
1	Introduction	3
2	COGENT Flow	4
3	Registration and Login 3.1 for New User 3.2 for Registered	5
4	My Profile	15
5	Education Detail	19
6	Service History	28
7	Add Expertise	38
8	Examination Detail	40
9	Add Expert Lecture	44
10	Add book Publication	53
11	Add Paper Publication	66



# 1. Introduction

## ❖ Basic Introduction

**COGENT** is a common platform for academic and academic administrative services to support all the stakeholders of higher and technical education institutions and universities of the State of Gujarat. It supports single sign on interface for all the services. It provides various teaching, learning and assessment tools and learning resources to faculty members and students. It supports seamless communications between Institutions and administrative offices enabling effective management of resources of government. This platform ensures implementation of state and central government's policies from time to time in easy and effective manner.



## 2. COGENT Flow

New User	Registered User
<p>1 Visit <a href="http://guigov.edu.in/">http://guigov.edu.in/</a> and click on <b>Sign Up</b></p>	<p>1 Visit <a href="http://guigov.edu.in/">http://guigov.edu.in/</a> and click on <b>Login</b></p>
<p>2 Pre-Register Yourself to COGENT with Email id and Mobile No.</p>	<p>2 Login with Email / Mobile No</p>
<p>3 Verify your email id and Mobile No. using OTP</p>	
<p>4 Fill-up your Personal Information and Institute Details in given registration form.</p>	
<p>5 Login with Email / Phone No.</p>	



COGENT

# **COGENT**

## **Registration and Login**



COGENT

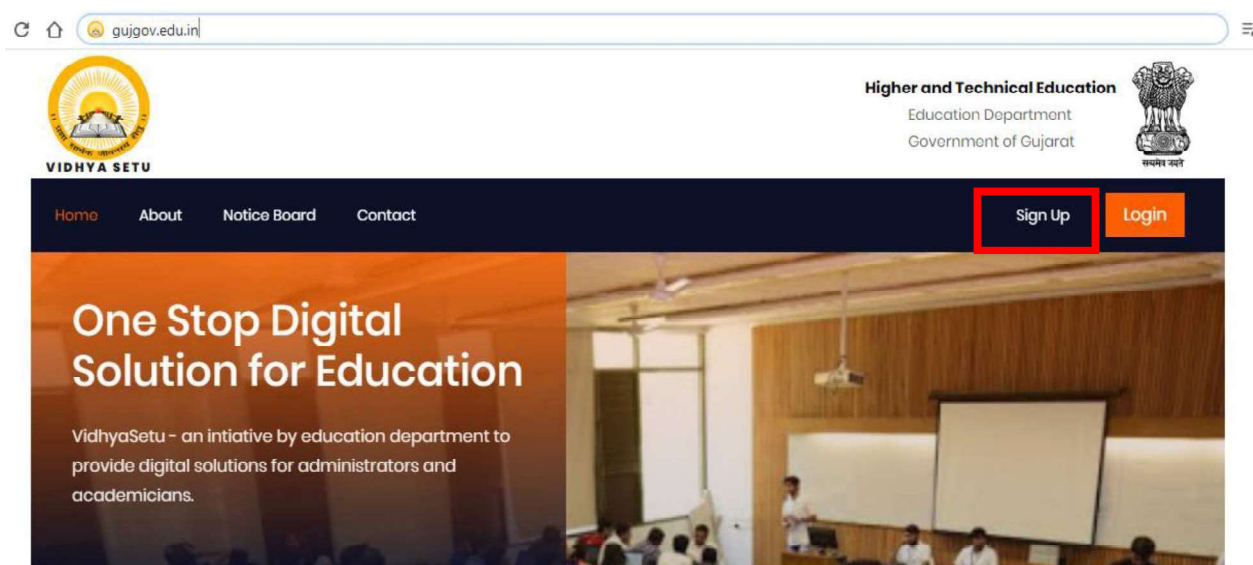
## 3. COGENT Registration and Login

### 3.1 For New User

#### ❖ Documents Required

1. Passport size photo \*(Scanned Copy) (file size must not exceed 02 mb)

**Step 1:** Visit official website <http://guigov.edu.in/> , and click on. **Sign Up**



[ 3.1.1 COGENT ]



COGENT

**Step 2:** Pre-Register Yourself to COGENT with email id and contact No., then click on **REGISTER**

The screenshot shows the COGENT registration interface. At the top is the COGENT logo and the text "COGENT". Below this is a "Create Account" section with four input fields: "Your Email Address", "Your Mobile No", "Enter Password", and "Confirm Password". A dark blue "REGISTER" button is at the bottom of the form, with a link "Already have an account ? Login" below it. Annotations with red arrows point to the fields: "Enter Your Email id" points to the email field, "Enter Your Mobile No." points to the mobile number field, and "Set password for COGENTPortal" points to both the password and confirm password fields.

### [3.1.2 Pre-Registration]

- After entering details in given pre-registration form, an OTP will be sent to given Email id and Phone No. entered by faculty member

*Note: please Click the [Login](#) link if you are already registered!*



COGENT

**Step 3:** Enter received OTP on your Email id and Mobile No. for Contact Verification.

**COGENT**

Verify Your Details

We have sent OTP to your mail id .

Enter Mail OTP

We have sent OTP to your mobile no .

Enter Mobile OTP

**VERIFY**

Already have an account ? Login

Enter OTP received on Email

Enter OTP received on Mobile number

### [3.1.3 Contact Verification]

**Step 4:** Click on **VERIFY**



COGENT

## Step 5: Fill-Up Registration form with your Personal Information and Institute Details

Higher and Technical Education  
Education Department  
Government of Gujarat

Basic Registration

Enter your basic details as per institute establishment records.  
\* Indicates required details

Registered Email Id

Registered Mobile No

Personal Info

Salutation \*

Person Name \*

Middle Name \*

Surname \*

Date of Birth \*

Gender \*

### [3.1.4 Personal Information]

Institute Details

Institute Type \*

Institute Name \*

Department Name \*

Appointment Type \*

Class type \*

Work type \*

Designation \*

### [3.1.5 Institute Details]



## Institute Details

### Institute Type \*

Private-Technical

Select

Govt-Technical

GIA-Technical

GIA-Higher

University

Private-Technical

Vidyapith

Special Institute

Other

### Institute Name

Select

### Appointment Type \*

Select

### Work type \*

Select

### Designation \*

Select

## Institute Details

### Institute Type \*

Private-Technical

### Institute Name \*

A-ONE PHARMACY COLLEGE

### Department/Subject Name \*

Admin

### Appointment Type \*

Select

Select

Regular

Adhoc

Contractual

Part Time

Fixpay Class-III

### Class type \*

Select

### Designation \*

Select

- Select Appointment Type from: **Regular, Adhoc, Contractual, Fixpay Class-III**



Institute Details

Institute Type \*

Private-Technical

Institute Name \*

A-ONE PHARMACY COLLEGE

Department/Subject Name \*

Admin

Appointment Type \*

Regular

Class type \*

Select

Work type \*

Select

Designation \*

Select

- Select Class Type from: **Class-I, Class-II, Class-III, Class-IV other than Govt.**

Institute Details

Institute Type \*

Private-Technical

Institute Name \*

A-ONE PHARMACY COLLEGE

Department/Subject Name \*

Admin

Appointment Type \*

Regular

Class type \*

Select

Work type \*

Select

Select

Teaching

Non-Teaching

Designation \*

Select

- Select Work Type from: **Teaching or Non-Teaching**



### Institute Details

Institute Type \*

Private-Technical

Institute Name \*

A-ONE PHARMACY COLLEGE

Department/Subject Name \*

Admin

Appointment Type \*

Regular

Class type \*

Select

Work type \*

Teaching

Designation \*

Select

Select Designation

### Upload Documents

Upload Photo \*

Max 2Mb

Choose File

No file chosen

CANCEL

SUBMIT

Upload Scanned Copy of Photo  
(file size must not exceed 02 mb)

Step6: Click on

SUBMIT

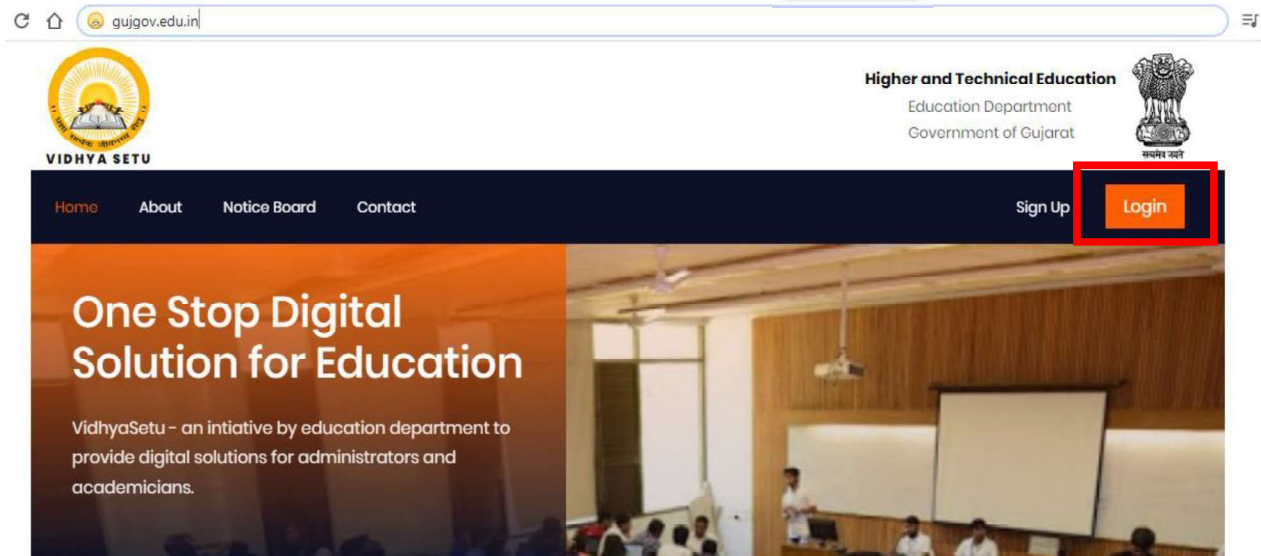
*Note: Post successful registration, you are allowed to login only after verification of your identity by your head of Institute.*



COGENT

### **3.2 For Registered User**

**Step 1:** Visit official website <http://guigov.edu.in/>. and Click on **Login**



[3.2.1 COGENT]

**Step 2:** Login with Email / Phone No. and Password.



COGENT

The image shows the COGENT login page with the following elements and callouts:

- COGENT** logo at the top center.
- Single Sign On (SSO) Platform** text below the logo.
- Enter your personal password** callout pointing to the Password field.
- Enter your Login ID (Email, Mobile No, PAN)** callout pointing to the Email Id/Phone No/Pan No field.
- Click Here to login!** callout pointing to the LOGIN button.
- Click here for new Registration** callout pointing to the [New User? Register Here](#) link.

Form fields and buttons include:

- Email Id/Phone No/Pan No
- Password
- Remember Me
- Forgot Password?
- LOGIN
- [New User? Register Here](#)

### [3.2.2 Login]

*Note: please Click the [Register Here](#) link if you are not registered!*



COGENT

# **COGENT**

## **My Profile**



## 4. COGENT My Profile

**Step 1:** Fill-Up your Personal Information.

Basic Detail

Email-Address

Mobile Number

Institute Name

Department Name

Designation Name

Salutation

Person Name

Middle Name

Surname

Class

Work Type

Birth Date

Gender

Religion\*

Category\*

Height (in C.M.)\*

Personal mark for identification\*

Blood Group\*

Is Physically Challenged?

☐ YES

☒ NO

### [4.1 Personal Information]



**Step 2:** Fill-Up your Communication Details i.e. Present Address and Permanent Address. If your Present Address and Permanent Address is same then click on **Same as Present Address** otherwise fill-up Permanent Address.

Communication Details

Present Address

Address Line 1\*

Address Line 2\*

City\*

State\*

District\*

Taluka\*

Pincode\*

Permanent Address

☒ Same as Present Address

Address Line 1\*

Address Line 2\*

City\*

State\*

District\*

Taluka\*

Pincode\*

#### [4.2 Communication Details]



**Step 3:** Fill-Up your Identity Details. Enter GPF Number or PPAN Number and PRAN Number.

Identity Details

Pan Card\*

GPF Number

PPAN Number

PRAN Number

Date of Joining Education Department\*

dd-mm-yyyy

Date of appointment(Fixpay)

dd-mm-yyyy

Date of appointment(Regular pay)

dd-mm-yyyy

Save and Continue

### [4.3 Identity Details]

**Step 4:** Click on 

Save and Continue



COGENT

# **COGENT**

## **Education Detail**



## 5. COGENT Education Detail

**Step 1:** Fill-Up your Education Details.

Education Details		
<b>Education Level*</b>	<b>Stream*</b>	<b>Degree*</b>
<input type="text" value="Select"/>	<input type="text" value="select"/>	<input type="text" value="select"/>
<b>Department/Branch*</b>	<b>Duration(In Years)*</b>	
<input type="text" value="select"/>	<input type="text" value="1"/>	
<b>University State*</b>	<b>Type of University*</b>	<b>Select University*</b>
<input type="text" value="Select"/>	<input type="text" value="select"/>	<input type="text" value="select"/>
<b>Type of Institute*</b>	<b>Institute Name*</b>	
<input type="text" value="Institute Of National Repute"/>	<input type="text" value="Institute"/>	
<b>Result*</b>	<b>Obtain*</b>	<b>Total*</b>
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>
<b>Awarded Class*</b>	<b>Passing Month*</b>	<b>Passing Year*</b>
<input type="text" value="Distinction"/>	<input type="text" value="select"/>	<input type="text" value="2020"/>
<input type="button" value="ADD"/>		

[5.1 Education Details]



Select Education Level

Education Details

**Education Level\***

Select

ITI

Diploma

**Graduate**

Post Diploma

Post Graduate Diploma

Post Graduate

Master of Philosophy

Doctorate

**Stream\***

select

**Degree\***

select

**Duration(In Years)\***

1

**Type of University\***

select

**Select University\***

select

**Type of Institute\***

Institute Of National Repute

**Institute Name\***

Institute

**Result\***

Select

**Obtain\***

**Total\***

**Awarded Class\***

Distinction

**Passing Month\***

select

**Passing Year\***

2020

ADD

- Select Education Level: ITI, Diploma, Graduate, Post Diploma, Post Graduate Diploma, Post Graduate, Master of Philosophy, Doctorate

Select Stream

Education Details

**Education Level\***

Graduate

**Department/Branch\***

select

**University State\***

Select

**Type of Institute\***

Institute Of National Repute

**Result\***

Select

**Awarded Class\***

Distinction

**Passing Month\***

select

**Passing Year\***

2020

ADD

**Stream\***

select

select

Agriculture

Architecture

**Arts**

Commerce

Computer Application

Education

Engineering

Hotel Management

Journalism

Law

Library

Linguistic

Management

Medical

Pharmacy

Physical Education

Science

Vocational courses

**Degree\***

select

**Select University\***

select

**Total\***



Education Details

**Education Level\*** Graduate **Stream\*** Arts **Degree\*** BA

**Department/Branch\*** select

**Duration(In Years)\*** 1

**Select University\*** select

**Institute Name\*** Institute

**Result\*** Select **Obtain\*** **Total\***

**Awarded Class\*** Distinction **Passing Month\*** select **Passing Year\*** 2020

ADD

Education Details

**Education Level\*** Graduate **Stream\*** Arts **Degree\*** BA

**Department/Branch\*** History

**Duration(In Years)\*** 1

**University State\*** Select **Type of University\*** select

**Type of Institute\*** Institute Of National Repute **Institute Name\*** Institute

**Result\*** Select **Obtain\*** **Total\***

**Awarded Class\*** Distinction **Passing Month\*** select **Passing Year\*** 2020

ADD



COGENT

Select University State

Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA

Department/Branch*	Duration(In Years)*
History	3

University State*	Type of University*	Select University*
Select	select	select

Type of Institute*	Institute Name*
Institute Of National Repute	Institute

Result*	Obtain*	Total*
Select		

Awarded Class*	Passing Month*	Passing Year*
Distinction	select	2020

ADD

Select Type of University

Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA

Department/Branch*	Duration(In Years)*
History	3

University State*	Type of University*	Select University*
GUJARAT	select select Deemed University Central University State University under other Department State University under education Department Private University Central National Importance	select

Type of Institute*	
Institute Of National Repute	

Result*		Total*
Select		

Awarded Class*	Passing Month*	Passing Year*
Distinction	select	2020

ADD



Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA
Department/Branch*		Duration(In Years)*
History		3
University State*	Type of University*	Select University*
GUJARAT	State University under education Department	Gujarat Technical University
Type of Institute*	Institute Name*	Total*
Self Finance	Institute	
Institute Of National Repute		
State Government Institute		
Grant-In Aid		
Self Finance		
Other		
Awarded Class*	Passing Month*	Passing Year*
Distinction	select	2020

Select Type of Institute

ADD

Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA
Department/Branch*		Duration(In Years)*
History		3
University State*	Type of University*	Select University*
GUJARAT	State University under education Department	Gujarat Technical University
Type of Institute*	Institute Name*	Total*
Self Finance	Institute	
Result*	Obtain*	Passing Year*
Select		
Awarded Class*	Passing Month*	
Distinction	select	

Enter Institute Name

ADD



Education Details

<b>Education Level*</b>	<b>Stream*</b>	<b>Degree*</b>
Graduate	Arts	BA
<b>Department/Branch*</b>		<b>Duration(In Years)*</b>
History		3
<b>University State*</b>	<b>Type of University*</b>	<b>Select University*</b>
GUJARAT	State University under education Department	Gujarat Technical University
<b>Type of Institute*</b>	<b>Institute Name*</b>	
Self Finance	Institute	
<b>Result*</b>	<b>Obtain*</b>	<b>Total*</b>
Select		
Percentage		
CPI		
CGPA		
Other		
<b>Passing Month*</b>	<b>Passing Year*</b>	
select	2020	
<b>ADD</b>		

Select Result

Education Details

<b>Education Level*</b>	<b>Stream*</b>	<b>Degree*</b>
Graduate	Arts	BA
<b>Department/Branch*</b>		<b>Duration(In Years)*</b>
History		3
<b>University State*</b>	<b>Type of University*</b>	<b>Select University*</b>
GUJARAT	State University under education Department	Gujarat Technical University
<b>Type of Institute*</b>	<b>Institute Name*</b>	
Self Finance	Institute	
<b>Result*</b>	<b>Obtain*</b>	<b>Total*</b>
CPI		
<b>Awarded Class*</b>	<b>Passing Month*</b>	<b>Passing Year*</b>
Distinction	select	2020

Enter Obtain and Total marks



Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA
Department/Branch*		Duration(In Years)*
History		3
University State*	Type of University*	Select University*
GUJARAT	State University under education Department	Gujarat Technical University
Type of Institute*	Institute Name*	
Self Finance	Institute	
Result*	Obtain*	Total*
CPI		
Awarded Class*	Passing Month*	Passing Year*
Distinction	select	2020

ADD

Select Awarded class

Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA
Department/Branch*		Duration(In Years)*
History		3
University State*	Type of University*	Select University*
GUJARAT	State University under education Department	Gujarat Technical University
Type of Institute*	Institute Name*	
Self Finance	Institute	
Result*	Obtain*	Total*
CPI		
Awarded Class*	Passing Month*	Passing Year*
Distinction	select	2020

ADD

Select Passing Month



Education Details

Education Level*	Stream*	Degree*
Graduate	Arts	BA

Department/Branch*	Duration(In Years)*
History	3

University State*	Type of University*	Select University*
GUJARAT	State University under education Department	Gujarat Technical University

Type of Institute*	Institute Name*
Self Finance	Institute

Result*	Obtain*	Total*
CPI		

Awarded Class*	Passing Month*	Passing Year*
Distinction	select	2020



ADD

Select Passing Year

Step 2: Click on **ADD**

You can view your Education Detail

Education Details

Sr. No	Education Level	Degree	University State	University/Board Name	Institute Name	Awarded Class	Passing year	Action
1	Graduate	BA	GUJARAT	Gujarat Technical University	Swaminarayan Arts College	Distinction	4/2019	 

Showing 1 to 1 of 1 entries

Previous 1 Next



COGENT

# **COGENT**

## **Service History Detail**



## 6. COGENT Service History Detail

**Step 1:** Fill-Up your Service History Details Before Joining Education Department.

The screenshot shows the 'Before Joining Education Department' form. It includes fields for 'Employer Name (Government / GIA / Private)\*', 'Designation\*', 'Last Year Annual Salary\*', 'From Date\*', and 'To Date\*'. Below these fields is an 'ADD' button. At the bottom, there is a table with columns: Sr. No, Employer Name, Designation, Start Date, End Date, Annual Salary, and Action. The table currently displays 'No data available in table'.

[6.1 Service History Details Before Joining Education Department.]

Enter Employer Name (Government / GIA / Private)

This screenshot shows the same form as before, but with a red box highlighting the 'Employer Name (Government / GIA / Private)\*' field. A red arrow points from the text 'Enter Employer Name (Government / GIA / Private)' to this field.

Enter Designation

This screenshot shows the form with the 'Employer Name' field filled with 'Gupta Darshana R'. The 'Designation\*' field is highlighted with a red box, and a red arrow points from the text 'Enter Designation' to it. The 'From Date' and 'To Date' fields have calendar icons next to them. The 'ADD' button is at the bottom.



Enter Last Year Annual salary

Before Joining Education Department

Employer Name (Government / GIA / Private) *	Designation *	Last Year Annual Salary *
<input type="text" value="Gupta Darshana R"/>	<input type="text" value="Software Developer"/>	<input type="text" value="Annual Salary"/>
From Date *	To Date *	
<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>	

ADD

Enter From Date

Before Joining Education Department

Employer Name (Government / GIA / Private) *	Designation *	Last Year Annual Salary *
<input type="text" value="Gupta Darshana R"/>	<input type="text" value="Software Developer"/>	<input type="text" value="400000"/>
From Date *	To Date *	
<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>	

ADD

Enter To Date

Before Joining Education Department

Employer Name (Government / GIA / Private) *	Designation *	Last Year Annual Salary *
<input type="text" value="Gupta Darshana R"/>	<input type="text" value="Software Developer"/>	<input type="text" value="400000"/>
From Date *	To Date *	
<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>	

ADD

Step 2: Click on

ADD



You can view your Service History Details [Before Joining Education Department](#).

Show  entries

Search:

Sr. No	Employer Name	Designation	Start Date	End Date	Annual Salary	Action
1	Gupta Darshana R.	Software Developer	2016-09-01	2019-09-02	400000	 

Showing 1 to 1 of 1 entries

Previous **1** Next

**Step 3:** Fill-Up your Service History Details [After Joining Education Department](#).

Service History After Joining Education Department

Action \*

---Select---

Action Mode \*

Select

Joining Institute \*

Select

Order No(as per DTE/DHE/education dept.) \*

Appointment Order No

Order Date \*

dd / mm / yyyy

Order merit no./sr.no. \*

Merit No/Sr No

Appointed Class \*

Work Type \*

Select

Designation \*

Appointed Department \*

Joining Date \*

dd / mm / yyyy

Joining Time \*

---Select---

Is this currently posted institute? \*

☐ Yes ☒ No

Relieving Date \*

dd / mm / yyyy

Relieving Time \*

---Select---

ADD

[6.2 Service History Details [After Joining Education Department](#).]



Select Action

Service History After Joining Education Department

Action \*  
---Select---

Action Mode \*  
Select

Joining Institute \*  
Select

Order No(as per DTE/DHE/education dept.) \*  
Appointment Order No

Order Date \*  
dd / mm / yyyy

Order merit no./sr.no. \*  
Merit No/Sr No

Appointed Class \*  
---

Work Type \*  
Select

Designation \*  
---

Appointed Department \*  
---

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted Institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
Select

ADD

Select Action Mode

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Select

Joining Institute \*  
Select

Order No(as per DTE/DHE/education dept.) \*  
Appointment Order No

Order Date \*  
dd / mm / yyyy

Order merit no./sr.no. \*  
Merit No/Sr No

Appointed Class \*  
---

Work Type \*  
Select

Designation \*  
---

Appointed Department \*  
---

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted Institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD



Select Joining Institute

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
Select

Order No(as per DTE/DHE/education dept.) \*  
Appointment Order No

Order Date \*  
dd / mm / yyyy

Order merit no./sr.no. \*  
Merit No/Sr No

Appointed Class \*  
Select

Work Type \*  
Select

Designation \*  
Select

Appointed Department \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

Please select an item in the list.

Enter Order No(as per DTE/DHE/education dept.)

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
Appointment Order No

Order Date \*  
dd / mm / yyyy

Order merit no./sr.no. \*  
Merit No/Sr No

Appointed Class \*  
Select

Work Type \*  
Select

Designation \*  
Select

Appointed Department \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

Enter Order Date

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
dd / mm / yyyy

Order merit no./sr.no. \*  
Merit No/Sr No

Appointed Class \*  
Select

Work Type \*  
Select

Designation \*  
Select

Appointed Department \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD



Enter Order merit no./sr.no.

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
Merit No/Sr No

Appointed Class \*  
Select

Designation \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Select Appointed Class

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Select

Designation \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Show 10 entries

Search:

Sr. No	Joining Type	Mode Of Joining	Joining Institute	Joining Department	Class	Designation
--------	--------------	-----------------	-------------------	--------------------	-------	-------------

Select Work Type

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Designation \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
Select

ADD



COGENT

Select Designation

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Work Type \*  
Teaching

Designation \*  
Select

Appointed Department \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Select Appointed Department

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Work Type \*  
Teaching

Designation \*  
ASSISTANT PROFESSOR

Appointed Department \*  
Select

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Work Type \*  
Teaching

Designation \*  
ASSISTANT PROFESSOR

Appointed Department \*  
History

Joining Date \*  
dd / mm / yyyy

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Select Joining Date



Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Work Type \*  
Teaching

Designation \*  
ASSISTANT PROFESSOR

Appointed Department \*  
History

Joining Date \*  
07 / 10 / 2019

Joining Time \*  
---Select---

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Select Joining Time

Service History After Joining Education Department

Action \*  
By Appointment

Action Mode \*  
Regular

Joining Institute \*  
GOVERNMENT ARTS & COMM COLLEGE, KADOLI

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order Date \*  
07 / 10 / 2019

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Work Type \*  
Teaching

Designation \*  
ASSISTANT PROFESSOR

Appointed Department \*  
History

Joining Date \*  
07 / 10 / 2019

Joining Time \*  
Before Noon

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Enter Relieving Date

Order No(as per DTE/DHE/education dept.) \*  
6843548

Order merit no./sr.no. \*  
4546435

Appointed Class \*  
Class 2

Work Type \*  
Teaching

Designation \*  
ASSISTANT PROFESSOR

Appointed Department \*  
History

Joining Date \*  
07 / 10 / 2019

Joining Time \*  
Before Noon

Is this currently posted institute? \*  
☐ Yes ☒ No

Relieving Date \*  
dd / mm / yyyy

Relieving Time \*  
---Select---

ADD

Enter Relieving Time


Step 4: Click on

ADD



You can view your Service History Details After Joining Education Department.

Show  entries Search:

Sr. No	Joining Type	Mode Of Joining	Joining Institute	Joining Department	Class	Designation	Start Date	End Date	Action
1	Regular	By Appointment	GOVERNMENT ARTS & COMM COLLEGE, KADOLI	History	Class 2	ASSISTANT PROFESSOR	2019-10-07	2020-09-19	 

Showing 1 to 1 of 1 entries Previous **1** Next



COGENT

# **COGENT**

## **Add Expertise**



## 7. COGENT Add Expertise

**Step 1:** Add your Expertise.

Add Expertise

**Subject Name**

Select

Add Expertise

[7.1 Add Expertise.]

Add Expertise

**Subject Name**

Select

Add Expertise

Select Subject Name

**Step 2:** Click on ADD Expertise

Export to Excel

You can View and also Export to Excel your Expertise Subject.

Export to Excel

Show 10 entries

Search:

Sr. No	Subject Name
1	Commerce->Marketing->Service Marketing->history
2	Physics->relativistic mechanics->general theory of relativity
3	History->Ancient History->Pre- History to 6th century B.C.->650 A.D to 1206 A.D->medieval history
4	History->medieval history->1757 A.D to 1818 A.D

Showing 1 to 4 of 4 entries

Previous 1 Next



COGENT

# **COGENT**

## **Examination Detail**



## 8. COGENT Examination Detail

Step 1: Fill-Up your Exam Type.

Exam Type	
<b>Exam Name*</b>	<b>Exam Type*</b>
--Select Type of Exam--	--Select Type of Exam--
<b>Passing Date*</b>	<b>Passing Year *</b>
dd / mm / yyyy	2020
<b>Passing Subject *</b>	<b>Passing Level*</b>
Passing Subject	--Select Type of Exam--
<b>Passing Institute*</b>	<b>Passing Institute*</b>
--Select Type of Exam--	passing Institute
<b>Exam Seat No. *</b>	<b>Upload Certificate* (pdf/jpg and &lt; 500KB)</b>
Roll No.	<input type="button" value="Browse..."/> No file selected.
<b>Certificate No.</b>	<b>Mukti Date*</b>
certificate number	dd / mm / yyyy
<input type="button" value="ADD"/>	

Select Exam Name

[8.1. Exam Type]

Exam Type	
<b>Exam Name*</b>	<b>Exam Type*</b>
--Select Type of Exam--	--Select Type of Exam--
<b>Passing Date*</b>	<b>Passing Year *</b>
dd / mm / yyyy	2020
<b>Passing Subject *</b>	<b>Passing Level*</b>
Passing Subject	--Select Type of Exam--
<b>Passing Institute*</b>	<b>Passing Institute*</b>
--Select Type of Exam--	passing Institute
<b>Exam Seat No. *</b>	<b>Upload Certificate* (pdf/jpg and &lt; 500KB)</b>
Roll No.	<input type="button" value="Browse..."/> No file selected.
<b>Certificate No.</b>	<b>Mukti Date*</b>
certificate number	dd / mm / yyyy
<input type="button" value="ADD"/>	



COGENT

Select Exam Type

**Exam Type**

Exam Name\*  
CCC

Exam Type\*  
--Select Type of Exam--

Passing Date\*  
dd / mm / yyyy

Passing Institute\*  
--Select Type of Exam--

Exam Seat No.\*  
Roll No.

Upload Certificate\* (pdf/jpg and < 500KB)  
Browse... No file selected.

ADD

Enter Passing Date

**Exam Type**

Exam Name\*  
CCC

Exam Type\*  
Theory & Practical

Passing Date\*  
dd / mm / yyyy

Passing Institute\*  
--Select Type of Exam--

Exam Seat No.\*  
Roll No.

Upload Certificate\* (pdf/jpg and < 500KB)  
Browse... No file selected.

ADD

**Exam Type**

Exam Name\*  
CCC

Exam Type\*  
Theory & Practical

Passing Date\*  
03 / 08 / 2020

Passing Institute\*  
--Select Type of Exam--

Exam Seat No.\*  
Roll No.

Upload Certificate\* (pdf/jpg and < 500KB)  
Browse... No file selected.

ADD

Select Passing Institute

**Exam Type**

Exam Name\*  
CCC

Exam Type\*  
Theory & Practical

Passing Date\*  
03 / 08 / 2020

Passing Institute\*  
ADARSH MAHILA SEVA SANGH PLOT NO.-114 3RD FLOOR, NEAR SHITAL ACADEMY, GH-5, SECT

Exam Seat No.\*  
Roll No.

Upload Certificate\* (pdf/jpg and < 500KB)  
Browse... No file selected.

ADD

Enter Exam Seat No.



**Exam Type**

**Exam Name\***

CCC

**Exam Type\***

Theory & Practical

**Passing Date\***

03 / 08 / 2020

**Passing Year \***

2020

**Passing Institute\***

ADARSH MAHILA SEVA SANGH PLOT NO.-114 3RD FLOOR, NEAR SHITAL ACADAMY, GH-5, SECT...

**Exam Seat No. \***

200451278

**Upload Certificate\* (pdf/jpg and < 500KB)**

Browse...

No file selected.

Upload Certificate  
(pdf/jpg and < 500KB)

Step 2: Click on **ADD**

You can View your Details of Exam

**Details of Exam**

Sr No.	Exam Name	ExamType	Passing year	Rollno	Certificate/ No	certificate	Action
1	CCC	Theory & Practical	2020	200451278		<a href="#">Download</a>	 



COGENT

# **COGENT**

## **Add Expert Lecture**



## 9. COGENT Add Expert Lecture

**Step 1:** Fill-Up your Expert Lecture Details.

Expert Lecture

Full Name

Staff Code

Department

TITLE OF LECTURE DELIVERED\*

NAME OF INSTITUTE/ORGANIZATION\*

DATE\*

dd/mm/yyyy

REMARKS\*

TYPE OF LECTURE\*

Select

SUBJECT\*

ADDRESS

ADDRESS LINE 1\*

ADDRESS LINE 2\*

STATE\*

Select

DISTRICT\*

TALUKA\*

CITY\*

LANDMARK\*

AREA\*

PINCODE\*

ADD

[9.1. Expert Lecture]



COGENT

Expert Lecture

Enter Title of Lecture Delivered

Full Name

Staff Code

Department

TITLE OF LECTURE DELIVERED\*

NAME OF INSTITUTE/ORGANIZATION\*

DATE\*

dd/mm/yyyy

REMARKS\*

TYPE OF LECTURE\*

Select

SUBJECT\*

ADDRESS

ADDRESS LINE 1\*

ADDRESS LINE 2\*

STATE\*

Select

DISTRICT\*

TALUKA\*

CITY\*

LANDMARK\*

AREA\*

PINCODE\*

ADD



COGENT

Expert Lecture

Enter Name of Institute/Organization

Full Name	<input type="text"/>	Staff Code	<input type="text"/>	Department	<input type="text"/>
TITLE OF LECTURE DELIVERED*	<input type="text"/>	NAME OF INSTITUTE/ORGANIZATION*	<input type="text"/>	DATE*	<input type="text" value="dd/mm/yyyy"/>
REMARKS*	<input type="text"/>	TYPE OF LECTURE*	<input type="text" value="Select"/>	SUBJECT*	<input type="text"/>
ADDRESS					
ADDRESS LINE 1*	<input type="text"/>	ADDRESS LINE 2*	<input type="text"/>	STATE*	<input type="text" value="Select"/>
DISTRICT*	<input type="text"/>	TALUKA*	<input type="text"/>	CITY*	<input type="text"/>
LANDMARK*	<input type="text"/>	AREA*	<input type="text"/>	PINCODE*	<input type="text"/>
<input type="button" value="ADD"/>					



Expert Lecture

Enter Date

Full Name	Staff Code	Department
TITLE OF LECTURE DELIVERED*	NAME OF INSTITUTE/ORGANIZATION*	DATE*
		dd/mm/yyyy
REMARKS*	TYPE OF LECTURE*	SUBJECT*
	Select	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	STATE*
		Select
DISTRICT*	TALUKA*	CITY*
LANDMARK*	AREA*	PINCODE*
ADD		



COGENT

Expert Lecture

**Enter Remarks**

Full Name  Staff Code  Department

TITLE OF LECTURE DELIVERED  NAME OF INSTITUTE/ORGANIZATION\*  DATE\*

REMARKS\*  TYPE OF LECTURE\*  SUBJECT\*

ADDRESS

ADDRESS LINE 1\*  ADDRESS LINE 2\*  STATE\*

DISTRICT\*  TALUKA\*  CITY\*

LANDMARK\*  AREA\*  PINCODE\*



COGENT

Select Type of Lecture

Expert Lecture

Full Name	<input type="text"/>	Staff Code	<input type="text"/>	Department	<input type="text"/>
TITLE OF LECTURE DELIVERED*		NAME OF INSTITUTE/ORGANIZATION*		DATE*	
<input type="text"/>		<input type="text"/>		<input type="text" value="dd/mm/yyyy"/>	
REMARKS*		TYPE OF LECTURE*		SUBJECT*	
<input type="text"/>		<input type="text" value="Select"/>		<input type="text"/>	
ADDRESS					
ADDRESS LINE 1*		ADDRESS LINE 2*		STATE*	
<input type="text"/>		<input type="text"/>		<input type="text" value="Select"/>	
DISTRICT*		TALUKA*		CITY*	
<input type="text"/>		<input type="text"/>		<input type="text"/>	
LANDMARK*		AREA*		PINCODE*	
<input type="text"/>		<input type="text"/>		<input type="text"/>	
<input type="button" value="ADD"/>					



Enter Subject

Expert Lecture

Full Name

Staff Code

Department

TITLE OF LECTURE DELIVERED\*

NAME OF INSTITUTE/ORGANIZATION\*

DATE\*

REMARKS\*

TYPE OF LECTURE\*

SUBJECT\*

ADDRESS

ADDRESS LINE 1\*

ADDRESS LINE 2\*

STATE\*

DISTRICT\*

TALUKA\*

CITY\*

LANDMARK\*

AREA\*

PINCODE\*

ADD



Expert Lecture

Full Name	<input type="text"/>	Staff Code	<input type="text"/>	Department	<input type="text"/>
TITLE OF LECTURE DELIVERED*		NAME OF INSTITUTE/ORGANIZATION*		DATE*	
<input type="text"/>		<input type="text"/>		<input type="text" value="dd/mm/yyyy"/>	
REMARKS*		TYPE OF LECTURE*		SUBJECT*	
<input type="text"/>		<input type="text" value="Select"/>		<input type="text"/>	
ADDRESS					
ADDRESS LINE 1*		ADDRESS LINE 2*		STATE*	
<input type="text"/>		<input type="text"/>		<input type="text" value="Select"/>	
DISTRICT*		TALUKA*		CITY*	
<input type="text"/>		<input type="text"/>		<input type="text"/>	
LANDMARK*		AREA*		PINCODE*	
<input type="text"/>		<input type="text"/>		<input type="text"/>	

ADD

Enter Address

Step 2: Click on

ADD



COGENT

# **COGENT**

## **Add Book Publications**



## 10. COGENT Add Book Publications

**Step 1:** Fill-Up your Book Publications Details.

Book Publication

Full Name	Staff Code	Department
-----------	------------	------------

NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
<input type="text"/>	<input type="text" value="2020"/>	<input type="text"/>
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>
NO OF CHAPTERS	TOTAL CHAPTERS	
<input type="text"/>	<input type="text"/>	
NAME OF PUBLISHER*	REMARKS*	
<input type="text"/>	<input type="text"/>	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*
<input type="text"/>	<input type="text"/>	<input type="text"/>

[10.1. Book Publications]



Book Publication

**Enter Name of Book**

Full Name  Staff Code  Department

**NAME OF BOOK\***  **YEAR OF PUBLICATION\***  **AREA OF BOOK DELIVERED\***

**PUBLICATION ID/ISBN**  **LEVEL\***  **NO OF CO-AUTHORS**

**NO OF CHAPTERS**  **TOTAL CHAPTERS**

**NAME OF PUBLISHER\***  **REMARKS\***

**ADDRESS**

**ADDRESS LINE 1\***  **ADDRESS LINE 2\***  **COUNTRY\***

[9.1. Book Publications]



Book Publication

Select Year of Publication

Full Name  Staff Code  Department

NAME OF BOOK\*  YEAR OF PUBLICATION\*  AREA OF BOOK DELIVERED\*

PUBLICATION ID/ISBN  LEVEL\*  NO OF CO-AUTHORS

NO OF CHAPTERS  TOTAL CHAPTERS

NAME OF PUBLISHER\*  REMARKS\*

ADDRESS

ADDRESS LINE 1\*  ADDRESS LINE 2\*  COUNTRY\*

ADD



COGENT

Enter Area of Book Delivered

Book Publication

Full Name	Staff Code	Department
<input type="text"/>	<input type="text"/>	<input type="text"/>
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
<input type="text"/>	<input type="text" value="2020"/>	<input type="text"/>
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>
NO OF CHAPTERS	TOTAL CHAPTERS	
<input type="text"/>	<input type="text"/>	
NAME OF PUBLISHER*	REMARKS*	
<input type="text"/>	<input type="text"/>	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*
<input type="text"/>	<input type="text"/>	<input type="text"/>

ADD



Book Publication

**Enter Publication ID/ISBN**

Full Name  Staff Code  Department

NAME OF BOOK\*  YEAR OF PUBLICATION\*  AREA OF BOOK DELIVERED\*

**PUBLICATION ID/ISBN**  LEVEL\*  NO OF CO-AUTHORS

NO OF CHAPTERS  TOTAL CHAPTERS

NAME OF PUBLISHER\*  REMARKS\*

ADDRESS

ADDRESS LINE 1\*  ADDRESS LINE 2\*  COUNTRY\*



Book Publication

**Select Level**

Full Name  Staff Code  Department

NAME OF BOOK\*  YEAR OF PUBLICATION\*  AREA OF BOOK DELIVERED\*

PUBLICATION ID/ISBN  **LEVEL\***  NO OF CO-AUTHORS

NO OF CHAPTERS  TOTAL CHAPTERS

NAME OF PUBLISHER\*  REMARKS\*

ADDRESS

ADDRESS LINE 1\*  ADDRESS LINE 2\*  COUNTRY\*



Enter No of Co-Authors

Book Publication

Full Name	Staff Code	Department
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
	2020	
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
	Select	
NO OF CHAPTERS	TOTAL CHAPTERS	
NAME OF PUBLISHER*	REMARKS*	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*
ADD		



Book Publication

Full Name	Staff Code	Department
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
	2020	
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
	Select	
NO OF CHAPTERS	TOTAL CHAPTERS	
NAME OF PUBLISHER*	REMARKS*	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*

Enter NO of Chapters

ADD



COGENT

Enter Total Chapters

Book Publication

Full Name	Staff Code	Department
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
	2020	
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
	Select	
NO OF CHAPTERS	<b>TOTAL CHAPTERS</b>	
NAME OF PUBLISHER*	REMARKS*	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*
ADD		



Book Publication

Full Name	Staff Code	Department
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
	2020	
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
	Select	
NO OF CHAPTERS	TOTAL CHAPTERS	
NAME OF PUBLISHER*	REMARKS*	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*
Enter Name of Publisher		
ADD		



Book Publication

Full Name	Staff Code	Department
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
	2020	
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
	Select	
NO OF CHAPTERS	TOTAL CHAPTERS	
NAME OF PUBLISHER*	REMARKS*	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*
ADD		

Enter Remarks



Book Publication

Full Name	Staff Code	Department
NAME OF BOOK*	YEAR OF PUBLICATION*	AREA OF BOOK DELIVERED*
	2020	
PUBLICATION ID/ISBN	LEVEL*	NO OF CO-AUTHORS
	Select	
NO OF CHAPTERS	TOTAL CHAPTERS	
NAME OF PUBLISHER*	REMARKS*	
ADDRESS		
ADDRESS LINE 1*	ADDRESS LINE 2*	COUNTRY*

ADD

Enter Address

Step 2: Click on

ADD



COGENT

# **COGENT**

## **Add Paper Publications**



## 11. COGENT Add Paper Publications

**Step 1:** Fill-Up your Paper Publications Details.

Paper Publication

Full Name		Staff Code		Department	
NAME OF PAPER*		YEAR OF PUBLICATION*		AREA OF PAPER DELIVERED*	
		2020			
PUBLICATION ID(ISBN)		LEVEL*		PUBLICATION TYPE*	
		Select		Select	
VOLUME		ISSUE NO		PAGE NO	
<input type="checkbox"/> IS REFERRED?		<input type="checkbox"/> IS MAIN AUTHOR?		<input type="checkbox"/> IS PEER REVIEWED?	
NAME OF PUBLISHER*		NO OF CO-AUTHORS		IMPACT FACTOR*	
CITATION INDEX		H INDEX		REMARKS	
ADDRESS					
ADDRESS LINE 1		ADDRESS LINE 2		COUNTRY	
				Select	

ADD

[11.1. Paper Publications]



COGENT

Paper Publication

Enter Name of Paper

Full Name

Staff Code

Department

NAME OF PAPER\*

YEAR OF PUBLICATION\*

AREA OF PAPER DELIVERED\*

2020

PUBLICATION ID(ISBN)

LEVEL\*

PUBLICATION TYPE\*

Select

Select

VOLUME

ISSUE NO

PAGE NO

☐ IS REFERRED?

☐ IS MAIN AUTHOR?

☐ IS PEER REVIEWED?

NAME OF PUBLISHER\*

NO OF CO-AUTHORS

IMPACT FACTOR\*

CITATION INDEX

H INDEX

REMARKS

ADDRESS

ADDRESS LINE 1

ADDRESS LINE 2

COUNTRY

Select

ADD



COGENT

Paper Publication

Select Year of Publication

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

ADD



COGENT

Enter Area of Paper Delivered

Paper Publication

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

ADD



COGENT

Paper Publication

Enter Publication ID (ISBN)

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

ADD



COGENT

Paper Publication

Select Level

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

ADD



COGENT

Select Publication Type

Paper Publication

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

ADD



Paper Publication

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

Enter Name of Publisher

ADD



Paper Publication

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select
<div>ADD</div>		

Enter Impact Factor



Paper Publication

Full Name	Staff Code	Department
NAME OF PAPER*	YEAR OF PUBLICATION*	AREA OF PAPER DELIVERED*
	2020	
PUBLICATION ID(ISBN)	LEVEL*	PUBLICATION TYPE*
	Select	Select
VOLUME	ISSUE NO	PAGE NO
<input type="checkbox"/> IS REFERRED?	<input type="checkbox"/> IS MAIN AUTHOR?	<input type="checkbox"/> IS PEER REVIEWED?
NAME OF PUBLISHER*	NO OF CO-AUTHORS	IMPACT FACTOR*
CITATION INDEX	H INDEX	REMARKS
ADDRESS		
ADDRESS LINE 1	ADDRESS LINE 2	COUNTRY
		Select

Enter Address

ADD

Step 2: Click on

ADD



COGENT



**COGENT**

**Knowledge Consortium of Gujarat (KCG),**

**Pragna Puram Campus, Opp. PRL,**

**Between Govt. Girls Polytechnic and LD College of Engineering,**

**Navrangpura, Ahmedabad.**

## પ્રકરણ - ૫

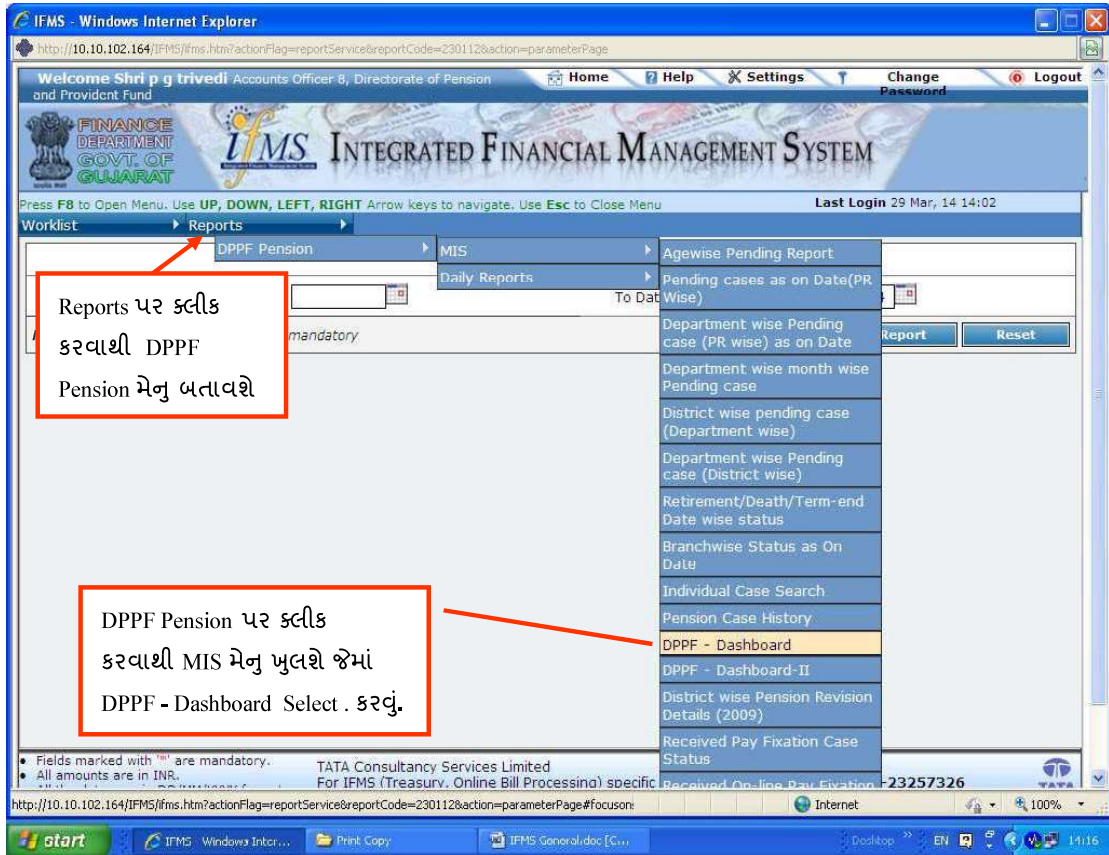
## Integrated Financial Management System (IFMS)

## અન્ય શાખાઓ

- ૧.૦ લીગલ મેટર શાખા :
- ૨.૦ શાસન - ૧ શાખા :
- ૩.૦ તકેદારી શાખા :
- ૪.૦ રજીસ્ટ્રી શાખા :

## ૧.૦ લીગલ મેટર શાખા :

- આ શાખામાં IFMS પ્રોગ્રામ અંતર્ગત પેટા હિસાબનીશના લોગ ઈન આઈ.ડી માંથી અઠવાડિક તેમજ માસિક પેન્શન કેસોનો અહેવાલ તૈયાર કરવામાં આવે છે.
- લોગ-ઇન થયા પછી નીચે મુજબની સ્ક્રીન ખૂલશે.



- Dashboard પર ક્લિક કર્યા પછી નીચે મુજબની સ્ક્રીન ખૂલશે.

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=reportService&reportCode=230112&action=parameterPage

Welcome Shri p g trivedi Accounts Officer B, Directorate of Pension and Provident Fund

Home Help Settings Change Password Logout

FINANCE DEPARTMENT GOVT. OF GUJARAT

IFMS INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 29 Mar, 14 14:02

Worklist Reports

DPPF - Dashboard

From Date \* : 24/03/2014 To Date \* : 29/03/2014

Note: Parameter marked with a "\*" are mandatory

Generate Report Reset

Fields marked with "\*" are mandatory.  
All amounts are in INR.

TATA Consultancy Services Limited  
For IFMS (Treasury, Online Bill Processing) specific Issues : 079-23257325 & 079-23257326

Internet 100%


- અઠવાડિક પેન્શન કેસ અહેવાલ માટે ઉક્ત સ્ક્રીન માં પ્રથમ From Date Field માં જે અઠવાડિયાનો અહેવાલ જોઈતો હોય તેની શરૂની તારીખ નાંખવી.
- માસિક પેન્શન કેસ અહેવાલ માટે ઉક્ત સ્ક્રીન માં પ્રથમ From Date Field માં જે માસનો અહેવાલ જોઈતો હોય તેની શરૂની તારીખ નાંખવી.
- ત્યારબાદ **Generate Report** પર ક્લિક કરવાથી નીચે મુજબનો **Report** ખુલશે.


IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=reportService&reportCode=230112&action=generateReport&FromParaPage=TRUE

>Welcome Shri p g trivedi Accounts Officer B, Directorate of Pension and Provident Fund

Home Help Settings Change Password Logout

 **FINANCE DEPARTMENT**  
GOVT. OF GUJARAT

 **IFMS**  
INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 29 Mar, 14 14:02

Worklist Reports

DPPF - Dashboard

Date From: 24/03/2014 To : 29/03/2014

Displaying 1 to 1 of 1 records.

Pages : 1

Branch	No. of New Pen. Cases					No. of Rev. Pen. Cases					No. of Serv. Certi. Cases					Total						
	Opn	Inw	Pass	Obj	Total	Opn	Inw	Pass	Obj	Total	Opn	Inw	Pass	Obj	Total	Opn	Inw	Total	Pass	Obj	Total	Pend
PR-1	489	92	47	28	506	28	30	13	1	94	16	7	11	2	10	583	129	712	71	31	102	610
PR-2	1061	179	51	10	1,179	146	29	21	2	147	4	1	1	0	4	1211	209	1420	73	17	90	1,330
PR-3	383	126	65	22	422	83	45	36	7	85	7	4	5	2	4	473	175	648	106	31	137	511
PR-4	957	95	102	36	915	213	38	34	7	210	3	10	3	2	8	1173	144	1317	139	45	184	1,133
PR-5	331	24	81	10	314	22	26	16	5	77	11	9	4	0	16	414	109	523	101	15	116	407
PR-6	227	60	67	0	220	18	1	10	0	9	0	0	0	0	0	245	61	306	77	0	77	229
Comp.	102	339	379	0	62	21	120	125	2	14	0	0	0	0	0	123	459	582	504	2	506	76
IA	99	381	365	54	61	11	127	115	5	18	0	0	0	0	0	110	508	618	480	59	539	79
PA-1	48	163	136	0	75	2	46	29	0	19	0	0	0	0	0	50	209	259	165	0	165	94
PA-2	75	202	150	3	124	25	69	44	1	49	0	0	0	0	0	100	271	371	194	4	198	173
Total	3772	1712	1443	163	3,878	669	531	443	35	722	41	31	24	5	42	4482	2274	6756	1910	204	2114	4,642

Branch Name	Advance Cases	Branch Name	Current Month Cases	Branch Name	Cases Already Due
PR-1	410	PR-1	0	Branch Name	NP RP SC Total

Done

Internet 100%

start IFMS - Windows Internet Explorer Print Copy IFMS General.doc [C... Desktop EN

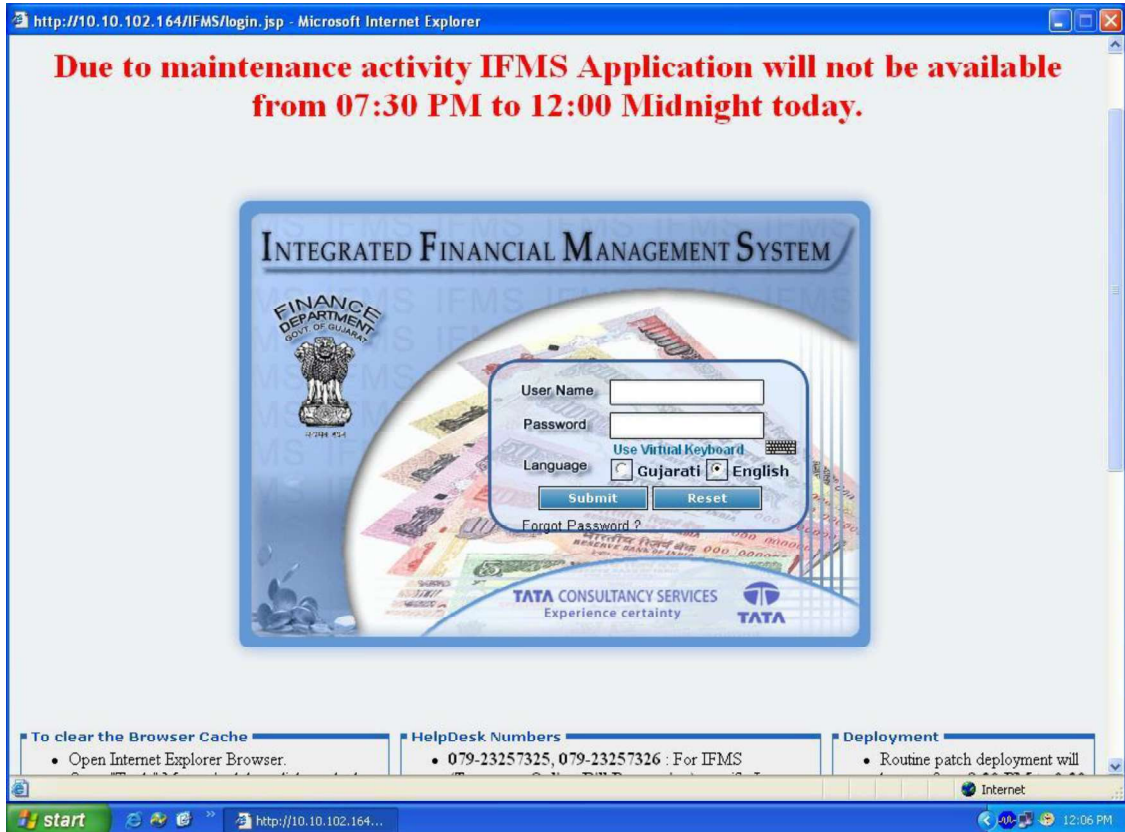
- અન્ય રાજ્ય સરકારના પેન્શનરના મોંઘવારી ભથ્થાના દર સુધારા(ON LINE UPDATE)ની કામગીરી નાચબ નિયામક કક્ષાએ થાય છે. જ્યારે તેની મેન્યુઅલી કામગીરી પેટા હિસાબનીશ દ્વારા રાજ્યના તમામ સંબંધિત જિલ્લા તિજોરી કચેરીઓને પેન્શનરના મોંઘવારી ભથ્થાના દર સુધારાના ઠરાવની નકલ મોકલવામાં આવે છે.
- અન્ય રાજ્ય સરકારના પેન્શનરના મોંઘવારી ભથ્થાના દર સુધારા(ON LINE UPDATE)ની કામગીરી IFMS પ્રોગ્રામ અંતર્ગત નાચબ નિયામકના લોગ ઈન આઈ.ડી.માં લોગ-ઇન થયા પછી નીચે મુજબની સ્ક્રીન ખૂલશે.

- ઉપરોક્ત સ્ક્રીનમાં ટી.આઈ. ઉપર ક્લિક કરી જે તે રાજ્યના હેડ કોડ સીલેક્ટ કરી D.A. RATE ON LINE UPDATE કરી શકાય છે.

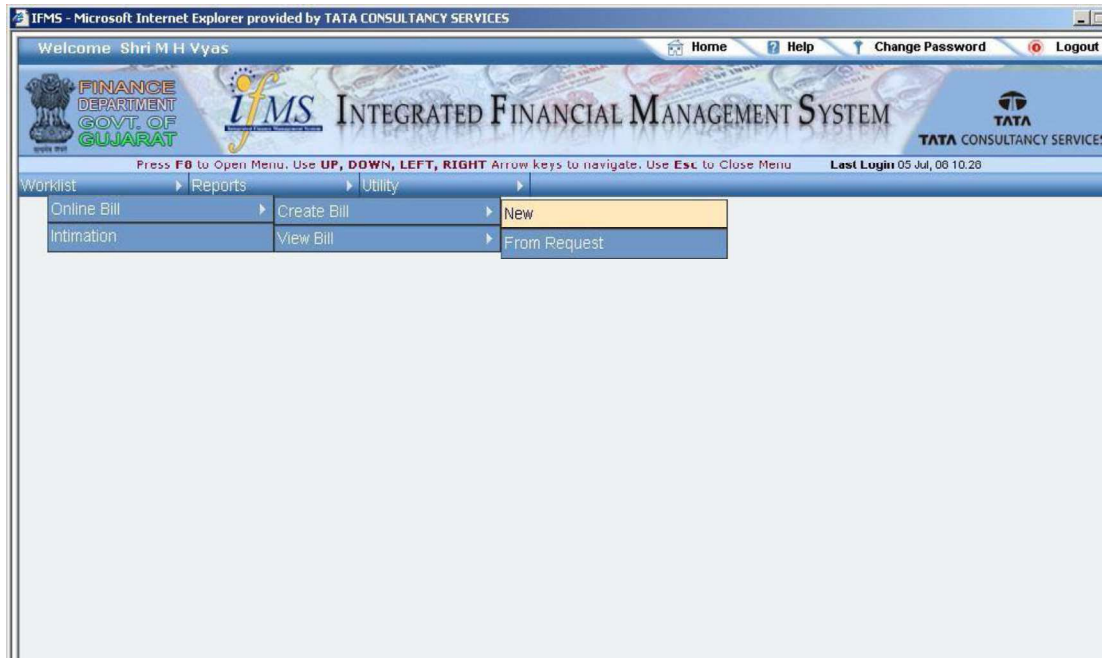
## ૨.૦ શાસન - ૧ શાખા :

- (૧) પગાર અને હિસાબી કચેરીમાં રજુ કરવામાં આવતા તમામ પ્રકારના બીલ (પગાર બીલ, જી.પી.એફ બીલ , કન્ટીજન્સી બીલ , મેડીકલ બીલ, પ્રવાસ ભથ્થા બીલ, સિમ્પલ રિસિપ્ટ બીલ)
- (૨) કર્મચારી/અધિકારીના ઇજાફા મુક્ત કરવાની કામગીરી
- (૩) બઢતી /ઉપધો અન્વયે પગાર બાંધણીની કામગીરી
- (૪) વિભાગ દ્વારા ફાળવવામાં આવતી ગ્રાન્ટ સ્વીકારવાની કામગીરી તેમજ નામદાર કોર્ટના ચુકાદા અન્વયે ગ્રેજ્યુઇટની વિલંબીત ચુકવણીના બીલમાં ગ્રાન્ટની ફાળવણી ઓનલાઇન થાય છે.

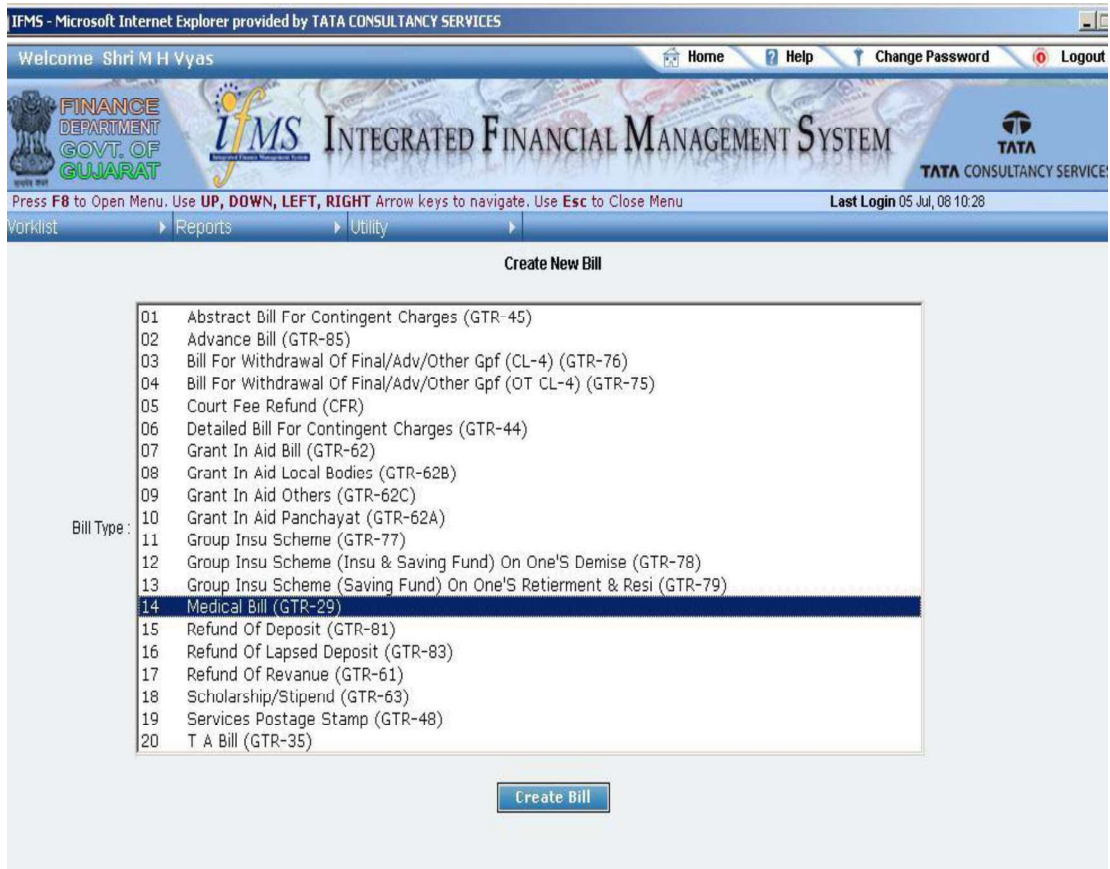
- (૧) પગાર અને હિસાબી કચેરીમાં રજુ કરવામાં આવતા તમામ પ્રકારના બીલ (પગાર બીલ, જી.પી.એફ બીલ , કન્ટીજન્સી બીલ , મેડીકલ બીલ, પ્રવાસ ભથ્થા બીલ, સિમ્પલ રિસિપ્ટ બીલ)



- લોગ-ઇન થયા પછી નીચે મુજબની સ્ક્રીન ખૂલશે.
- Inward Details પર ક્લિક કર્યા પછી નવું બીલ બનાવવા માટે નીચે મુજબની કાર્યવાહી કરવી



- જે બીલ બનાવવું હોય તે નીચેના સ્ક્રીનમાંથી સિલેક્ટ કરવું



➤ પગાર બીલ બનાવવા અને તેનું ઇ-પેમેન્ટ કરવા નીચે મુજબની કાર્યવાહી કરવી

### Bill Preparation Form GTR-30 Details

#### DDO Information

DDO No. : 143 Cardex No. : 134  
 Name : p g trivedi Designation : Accounts Officer  
 : Accounts  
 Officer,DIRECTORATE  
 Office Name OF PENSION & District Code : 71  
 PROVIDENT FUND,  
 GANDHINAGAR,  
 Gandhinagar  
 Bill Creator : Bill Approver :

ePayment

#### Employee Details

#### Budget Details

#### DDO Grant Heads

Payment Type

CNF No : \* CNF Date : \*  
 Recoupment Head : \* \* \* \* \*  
 Structure : \* \* \* \* \*

Select	Scheme Code	Demand No.	Major Head	Sub-Major Head	Minor Head	Sub Head
--------	-------------	------------	------------	----------------	------------	----------

Press Esc To Close.

#### EDP Details

#### Expenditure Details

Budget Code	Description	EDP Code	Amount (Rs)
0101	Pay Of Officers	0101	0.00
0102	Pay Of Establishment	0102	0.00
0103	Dearness Allow.	0103	0.00
0104	Other Allowance	0104	0.00
0107	Medical Allowances	0107	0.00
0108	Bonus	0108	0.00
0109	Leave Encashment	0109	0.00
0110	House Rent Allowance	0110	0.00
0111	Compensatory Local Allowance	0111	0.00
0112	Interim Relief	0112	0.00
0113	Transport Allowance	0113	0.00

0117	R.O.P. Arrears(Gazetted)	0117	0.00
0118	R.O.P. (Non Gazetted)	0118	0.00
0119	D P	0119	0.00
0120	D P	0120	0.00
0104	Uniform Allow.	0131	0.00
0104	Washing Allow.	0132	0.00
2800	Payment Of Prof. & Special Services	2801	0.00
5000	Other Charges	5006	0.00
0105	Leave Travel Concession	0105	0.00
0106	Reimbursement Of Medical Charges	0106	0.00

## Recovery Details

Budget Code	Description	EDP Code	Amount (Rs)
0101	Pay Of Officers	0101	0.00
0102	Pay Of Establishment	0102	0.00
7057	Festival Advances	7057	0.00
7058	Food Grains Advances	7058	0.00

## Receipt Details

EDP Code	Description	DED Type	Major Head	Sub-Major Head	Minor Head	Sub Head	Amount (Rs)
9510	Income Tax	A	8658	00	112	00	0.00
9520	Surcharge On Income Tax	A	8658	00	112	00	0.00
9530	Postal Life Insurance	A	8658	00	103	00	0.00
9531	G.P.F. Class Iv	A	8009	01	101	02	0.00
9532	Pf Worked Charged Employee	A	8009	60	103	02	0.00
9533	Pf Rozamdar Employee	A	8009	60	103	04	0.00
9534	New Define Contributory Pension Scheme Type - 1, Govt. Servants Share	A	8342	00	117	01	0.00
9540	Baroda State Life Insurance	A	8658	00	103	00	0.00
9550	Rent Of Building(0216)	A	0216	01	106	01	0.00
9560	Rent Of Building (Major_Head-2055)	A	0216	01	107	00	0.00

9570	Professional Tax	A	0028	00	107	01	0.00
9580	Govt.Servants Insurance Schemes	A	0235	60	105	00	0.00
9581	Govt. Insurance Scheme-1981-Insurance Fund	A	8011	00	107	01	0.00
9582	Govt. Insurance Scheme-1981-Saving Fund	A	8011	00	107	02	0.00
9583	I.A.S. Insurance Scheme-1980-Insurance Fund	A	8658	00	123	00	0.00
9584	I.A.S. Insurance Scheme-1980-Saving Fund	A	8658	00	123	00	0.00
9585	Div.Acctt.Insu.Scheme-1980-Insurance Fund	A	8658	00	101	00	0.00
9586	Div.Acctt.Insu.Scheme-1980-Saving Fund	A	8658	00	101	00	0.00
9587	Divl.Acctt./Central Govt. Servant G.P.F. Account	A	8658	00	101	00	0.00
9590	Government Housing Fund	A	8121	00	114	01	0.00
9591	House Building Advance(Principal & Interest)	A	7610	00	201	02	0.00
9592	Motorcar/Scooter/Motor Cycle/Moped Adv.(Principal & Interest)	A	7610	00	202	00	0.00
9600	Security Deposit	A	8443	00	103	00	0.00
9620	I.A.S. Provident Fund	B	8009	01	104	01	0.00
9670	G.P.F. Other Than Class-Iv	B	8009	01	101	01	0.00
9680	G.P.Fund-Divisional Accountant	B	8009	01	101	03	0.00
9690	Contributory Provident Fund	B	8009	01	102	01	0.00
9701	Festival Advances Of Non Govt. Schools / Colleges	B	7615	00	200	10	0.00
9711	Food Grain Advances Of Non Govt. School / Colleges	B	7615	00	200	12	0.00
9720	Fan Advance	B	7610	00	800	01	0.00
9740	Other Conveyance Advance	B	7610	00	203	00	0.00
9760	Interest On Advances To Govt. Servants	B	0049	04	800	03	0.00
9780	Jeep Rent.	B	0070	60	114	00	0.00
9790	P.F. Adjustable By Other A.O.	B	8658	00	101	00	0.00

9910	Misc. Recovery	B	0000	00	000	00	0.00
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**Receipt-Data Summary**

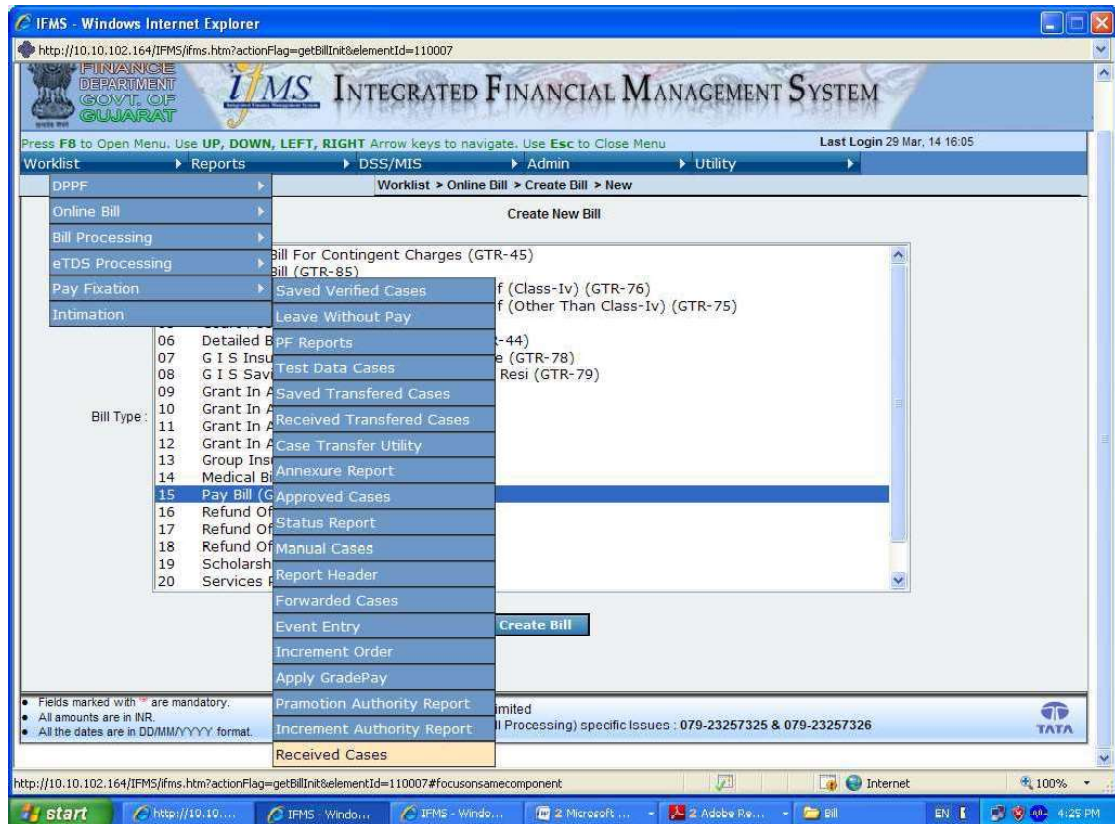
EDP Code	Challan Date	PD Account	Party	Amount *
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Deduction-A	Deduction-B	Expenditure	Recovery
0.00	0.00	0.00	0.00

**Expense Summary**

Gross Total	: 0.00
Recovery	: 0.00
Deduction A	: 0.00
Deduction B	: 0.00
Net Total	:
Amount In Rs.	:
Disbursement Amount	: 0.00
Appropriation for	:
Expenditure including this bill	:
Balance	:

(૨) કર્મચારી/અધિકારીના ઇજાફ મુક્ત કરવાની કામગીરી જે અધિકારી /કર્મચારીનો ઇજાફો મુક્ત કરવાનો હોય તે નીચેના સ્ક્રીનમાંથી સિલેક્ટ કરવો



- જે અધિકારી/કર્મચારી ના ઇજાફા મુક્ત કરવાના હોય તેની ઇવેન્ટ ની એન્ટ્રી નાખી સેવ કરવું
- ત્યાર બાદ ઇંક્રીમેન્ટ ઓર્ડર પર ક્લિક કરી ઓર્ડર જનરેટ કરવો

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=getEventEntryPage&headerId=99809113871

This screen will be used to enter the details of any event after 31-03-2009 [Higher grade, Promotion, Deemed date, Stepping up]. If any event occur after 31-03-2009 till 31-07-2010, Approver has to enter the details if option "No" is selected than system will understand that no event has been occurred and regular increment will be given. Order will be generated based on the option selected by user.

**For any event after 01/07/2009 to till date select 2012 year in combo and select "YES" option and save event entry to generate proper increment order**

**If any Event after 01/01/2006, Please add those events in Manual Cases Link!!!**

Increment Year:  Select event Yes/No: ☒ Yes ☐ No

**Employee Audit Details**

Events:  Date of Event:  Revised Scale:  Option: ☐

**Event Information**

Event	Date of Event	Revised Scale	Revised Pay	Increment Date	Option	Delete
<input type="button" value="Save"/> <input type="button" value="Close"/>						

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=forwardEmployeeDetails&flag=1&RcvdCase=1&elementId=400023

Click on rejected **Red icon** in STATUS column to see the rejection remarks

Employee ID	Employee Name	GAGUJ	PR	Date of Event	Order	Audit	Status	Approval
9810052149	BHAYCHANDBHAI PATEL	GAGUJ 49429		31/05/2027	Order	Audit		PVU_APPROVED
9810052148	Mr. NAINESHKUMAR NATVARLAL PATHAK	GAGUJ 50510		31/10/2014	Order	Audit		PVU_APPROVED
9810052143	Mr. VIPIN VASANJI CHAUDHARY	GAGUJ 40130	PR-3/03/2009/176570	31/03/2009	Order	Audit		DPPF_APPROVED
9810052141	Mr. SANATKUMAR VRIJLAL SHAH	GAGUJ 50477		30/09/2022	Order	Audit		PVU_APPROVED
9810052140	Mr. SURESHKUMAR DAHYABHAI GURJAR	GAGUJ 54362		30/11/2024	Order	Audit		PVU_APPROVED
9810052139	Mr. SURESHKUMAR KHODABHAI BHARVAD	GAGUJ 64224		31/05/2029	Order	Audit		PVU_APPROVED
9810052138	Mr. BAKULBHAI JAYENDRABHAI PATEL	GAGUJ 50479		30/04/2030	Order	Audit		PVU_APPROVED
9810052137	Mrs. CHHAYABEN HARIBHAI SHRUNGARPURE	GAGUJ 53058		31/08/2011	Order	Audit		PVU_APPROVED
9810052136	Mr. RAVINDRASINH VIJAYSINH RATHOD	GAGUJ 54358		30/06/2033	Order	Audit		PVU_APPROVED
9810052134	Mr. MANUBHAI VAGHJIBHAI CHAUHAN	GAGUJ 48526		31/05/2025	Order	Audit		PVU_APPROVED
9810052133	Mr. AJITKUMAR BABUBHAI JOSHI	GAGUJ 50456		30/11/2029	Order	Audit		PVU_APPROVED
9810052131	Mr. MOHANBHAI JIVANBHAI PATEL	GAGUJ 29873		30/06/2024	Order	Audit		PVU_APPROVED
9810052130	Mr. UMESH MAHESHBHAI OZA	GAGUJ 53608		31/01/2021	Order	Audit		PVU_APPROVED
9810052129	Mr. GUMANSINH SONJIBHAI VASAVA	GAGUJ 10577		31/07/2021	Order	Audit		PVU_APPROVED
9810052127	Mr. NARENDRAKUMAR KANTILAL SHAH	GAGUJ 36030		31/07/2011	Order	Audit		PVU_APPROVED

Office Order Annexure II Intimate Forward Increment Order Cancel

Fields marked with \* are mandatory.  
All amounts are in INR.  
All the dates are in DD/MM/YYYY format.

TATA Consultancy Services Limited  
For IFMS (Treasury, Online Bill Processing) specific Issues : 079-23257325 & 079-23257326

TATA

IFMS - Microsoft Internet Explorer provided by TATA CONSULTANCY SERVICES

Welcome Shri M H Vyas

Home Help Change Password Logout

FINANCE DEPARTMENT GOVT. OF GUJARAT

ifms INTEGRATED FINANCIAL MANAGEMENT SYSTEM

TATA CONSULTANCY SERVICE

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 05 Jul, 08 10:28

Worklist Reports Utility

Create New Bill

Bill Type :

01	Abstract Bill For Contingent Charges (GTR-45)
02	Advance Bill (GTR-85)
03	Bill For Withdrawal Of Final/Adv/Other Gpf (CL-4) (GTR-76)
04	Bill For Withdrawal Of Final/Adv/Other Gpf (OT CL-4) (GTR-75)
05	Court Fee Refund (CFR)
06	Detailed Bill For Contingent Charges (GTR-44)
07	Grant In Aid Bill (GTR-62)
08	Grant In Aid Local Bodies (GTR-62B)
09	Grant In Aid Others (GTR-62C)
10	Grant In Aid Panchayat (GTR-62A)
11	Group Insu Scheme (GTR-77)
12	Group Insu Scheme (Insu & Saving Fund) On One'S Demise (GTR-78)
13	Group Insu Scheme (Saving Fund) On One'S Retirement & Resi (GTR-79)
14	Medical Bill (GTR-29)
15	Refund Of Deposit (GTR-81)
16	Refund Of Lapsed Deposit (GTR-83)
17	Refund Of Revenue (GTR-61)
18	Scholarship/Stipend (GTR-63)
19	Services Postage Stamp (GTR-48)
20	T A Bill (GTR-35)

Create Bill

(૩) બઢતી /ઉપઢો અન્વયે પગાર બાંધણીની કામગીરીમાં નીચેની સ્કીનમાં ડેટા એન્ડ્રી કરી સેવ કરી ઓફિસ ઓર્ડર કાઢવો

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=getEmployeeDetails&elementId=400002

Welcome Shri M J Solanki Deputy Accountant 1, Directorate of Pension and Provident Fund

Home Help Settings Change Password Logout

FINANCE DEPARTMENT GOVT. OF GUJARAT

ifms INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 26 Mar, 14 13:06

Worklist Reports DSS/MIS Utility

Worklist > Pay Fixation > Data Entry

Select Language : ☒ English ☐ Gujarati

Employee Details

☐ Please select checkbox to retain common entries.

Personal Details

Prefix: Mr. First Name: Surname: Middle Name: GPF A/c No. (Eq.GAGUU) (Eq.12345) New Pension Scheme: PPO Number, if any: Fetch PPO: Buckle Number(Only for Police): Email Id: Gender: ☒ Male ☐ Female Date Of Birth:

Departmental Details

Status: Select Present Designation: Cardex No: District: Select DDO Code: Name of Present Office: Select Category: Class: Select Taluka: Station: Select Name Parent Administrative Department: Select Name Parent Head Department:

Done

Internet 100%

- (૪) વિભાગ દ્વારા ફાળવવામાં આવતી ગ્રાન્ટ સ્વીકારવાની કામગીરી તેમજ નામદાર કોર્ટના ચુકાદા અન્વયે ગ્રેજ્યુઇટની વિલંબીત ચુકવણીના બીલમાં ગ્રાન્ટની ફાળવણી ઓનલાઇન થાય છે.

### ૩.૦ તકેદારી શાખા :

- ૧) નિવૃત્ત થયેલ હોય પરંતુ પેન્શન કેસનું આખરીકરણ થયેલ ન હોય તેવા પેન્શનરોની માહિતી દર વર્ષે ઓગષ્ટ મહિનામાં GSWAN મારફતે <http://10.10.102.164/IFMS> વેબસાઈટમાં તમામ ઉપાડ અધિકારીઓએ PATRAK-II ની લીંકમાં માહિતી ભરવાની રહેશે.
  - ૨) ઉપાડ અધિકારીશ્રી દ્વારા ઓન લાઈન અત્રેની કચેરીમાં મોકલવામાં આવેલ માહિતી ઉપરથી જીલ્લાવાર, વિભાગવાર, વર્ષવાર, અધિકારી/કર્મચારીના વર્ગવાર જે કારણસર પેન્શન કેસનું આખરીકરણ થયેલ ન હોય જે કારણવારના જરૂરિયાત મુજબના રીપોર્ટ તૈયાર કરવાની કામગીરી.
- લોગ-ઇન થયા પછી નીચે મુજબની સ્ક્રીન ખૂલશે.
  - જેમાં Reports → DPPF → District/Department/HOD wise Patrak - II Cases Select કરી અથવા જરૂરિયાત પ્રમાણેના અન્ય Option Select કરવામાં આવે છે.



- Option Select કરતાં નીચે મુજબની સ્ક્રીન ખૂલશે.

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/IFMS.htm?actionFlag=reportService&reportCode=230199&action=parameterPage&elementId=230163

Welcome Shri L M PARMAR LM Vig Report 1, Directorate of Pension and Provident Fund

Home Help Settings Change Password Logout

FINANCE DEPARTMENT GOVT. OF GUJARAT

IFMS INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 31 Mar, 14 13:23

Reports

**District/Department/HOD wise Patrak-II cases**

From Date : 01/01/1985 To Date : 31/03/2014

Department : Education Department HOD : Commissioner of Mid-day-Meals And Schools

District : District Treasury Office, Ahmedabad

Note: Parameter marked with a "\*" are mandatory

Generate Report

Fields marked with "\*" are mandatory. TATA Consultancy Services Limited

- From Date, To date, Department, HOD, District વગેરે Field Select કરી Generate Report બટન દબાવતાં નીચે મુજબ Report Generate થશે.

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/IFMS.htm?actionFlag=reportService&reportCode=230199&action=generateReport&fromParaPage=TRUE

Welcome Shri L M PARMAR LM Vig Report 1, Directorate of Pension and Provident Fund

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IFMS INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 31 Mar, 14 13:23

Reports

**District/Department/HOD wise Patrak-II cases**

Date From: 01/01/1985 To : 31/03/2014 Department: Education Department

HOD: Commissioner of Mid-day-Meals And Schools District: District Treasury Office, Ahmedabad

Displaying 1 to 1 of 1 records.

Pages : 1

Sr.No	Office	District	Name	Designation	Class	Retirement Date	Reason
1	Accounts Officer, DISTRICT EDUCATION OFFICE (RURAL), Ahmedabad	Ahmedabad	MOTIBHAI UGARABHAI VANKAR	Inspector	Class II	30/09/1993	Departmental Inquiry

Displaying 1 to 1 of 1 records.

Pages : 1

Date: 31/03/2014 01:30 PM

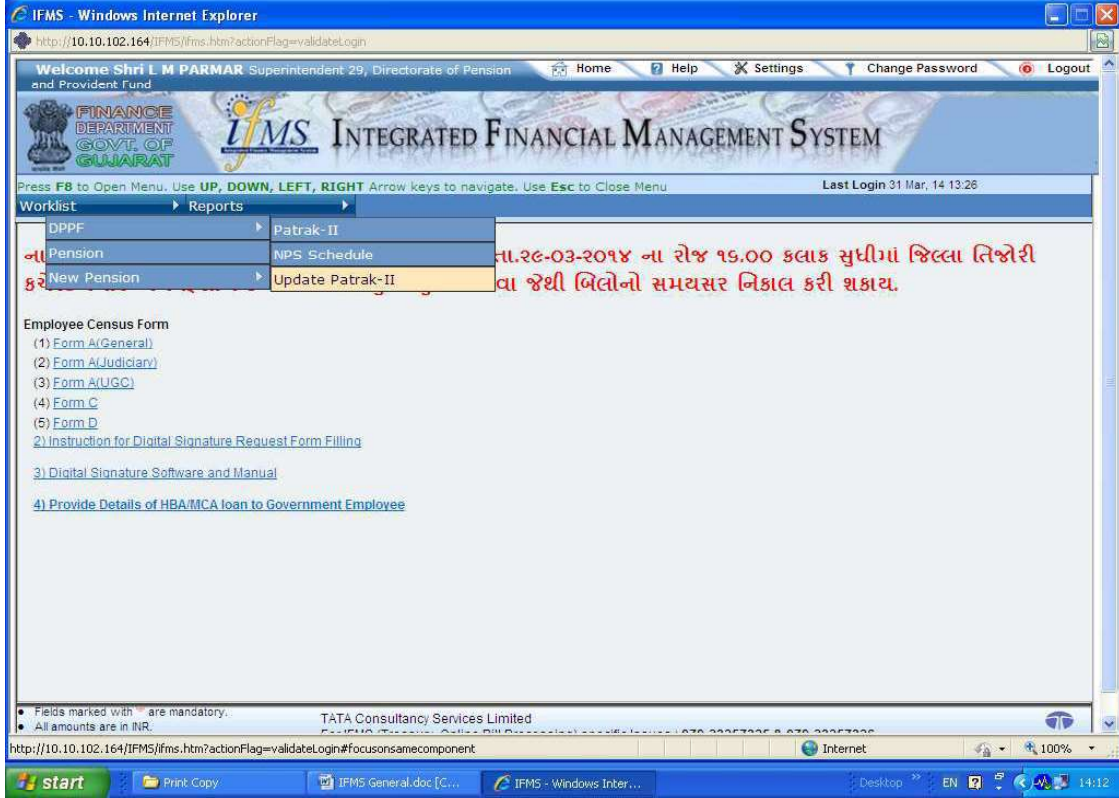
\* Generated By TCS

Print Export To : Excel PDF Text (80C) Text (132C)

OK

Fields marked with "\*" are mandatory. TATA Consultancy Services Limited

- ૩) જે પેન્શનરોના પેન્શન કેસનું આખરીકરણ થઈ ગયેલ હોય તેવા પેન્શનરોના પીપીઓ નંબર શોધી વેબસાઈટમાં અપડેટ કરી લીસ્ટમાંથી કમી કરવાની કામગીરી.
- લોગ-ઇન થયા પછી નીચે મુજબની સ્ક્રીન ખુલશે.
  - જેમાં Worklist → DPPF → Update Patrak – II Option Select કરવામાં આવે છે.



- Option Select કરતાં નીચે મુજબની સ્ક્રીન ખુલશે.



- જેમાં જેઓના પી.પી.ઓ. થઈ ગયા છે તે પેન્શનરોની પીપીઓ નં. સાથેની વિગત નાખી Search કરી તેમને લીસ્ટમાંથી કમી કરવામાં આવે છે.

- ૪) બાકી પેન્શન કેસોની નાણા વિભાગ દ્વારા માંગવામાં આવે તે માહિતી પૂરી પાડવાની કામગીરી.
- ૫) આગામી વર્ષોમાં નિવૃત્ત થનાર અધિકારીશ્રી/કર્મચારીઓની વિગત.
- ૬) જાહેર માહિતી અધિકાર અધિનિયમ-૨૦૦૫ હેઠળ આવેલ અરજીઓની ત્રિમાસિક માહિતી નાણા વિભાગ (RTI CELL) ને ઓન લાઈન મોકલવાની કામગીરી,

## ૪.૦ રજીસ્ટ્રી શાખા :

(૧) અત્રેની શાખામાં વિવિધ વિભાગ - કચેરીઓમાંથી સ્વૈચ્છિક નિવૃત્ત થતાં કર્મચારીઓ માટે સ્વૈચ્છિક નિવૃત્તિ પ્રમાણપત્ર માટે સેવાપોથી આવે છે. જેની IFMS પ્રોગ્રામ દ્વારા ઈન્વર્ડની કામગીરી થાય છે.

➤ આ માટે IFMS પ્રોગ્રામ અંતર્ગત જુનીયર ક્લાર્ક દ્વારા લોગ-ઈન થતાં નીચે મુજબની સ્કીન ખુલશે.

(૨) તેવી જ રીતે વિવિધ વિભાગ કચેરીઓમાંથી વચનિવૃત્તિ થતા કર્મચારી/અધિકારીઓના પેન્શન કેસો IFMS પ્રોગ્રામ દ્વારા ઈન્વર્ડ કરવામાં આવે છે. આમ, રજીસ્ટ્રી શાખામાં IFMS પ્રોગ્રામ દ્વારા પેન્શન કેસો ઈન્વર્ડ થાય છે. તેમજ મંજૂર કે વધુ પૂર્તતા અર્થેના પેન્શન કેસો પણ IFMS પ્રોગ્રામ દ્વારા આઉટવર્ડની કામગીરી કરવામાં આવે છે.

➤ પેન્શન કેસો ઈન્વર્ડ કરવા નીચે મુજબની સ્કીન ખુલતા New → Pension Case માં જઈ Details ભરી કેસ ઈન્વર્ડ કરવામાં આવે છે.

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=getInwardPageCombo&contentUsingAjax=false&elementId=230003

Welcome Shri Daxesh Sharadbhai Mistry Data Entry Operator 13, Directorate of Pension and Provident Fund

Home Help Settings Change Password Logout

FINANCE DEPARTMENT GOVT. OF GUJARAT

IFMS INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 29 Mar, 14 16:26

Worklist Reports

Worklist > Pension > Inward

**Case Details**

Case Type: New \* Type of Inward: Pension Case \*

Inward No: -- Select -- \* Inward Date: 29/03/2014 \*

PPO No: New \* Document Count: 1

No. of Revision: 0

**Office Details**

Department: -- Select -- \* H.O.D.: -- Select -- \*

Office Name: \* Office Address: \*

State: Gujarat \* District: --Select-- \*

Taluka: -- Select -- \* Pin Code: \*

**Pension Details**

Type of Pension: -- Select -- \*

Designation: Other \* Other Designation: \*

Surname: \* First Name: \*

Middle Name: \* Date of Birth: \*

Date of Joining: \* Date of Retirement: \*

Pensioner Type: -- Select -- \*

Pension Start Date: \*

**Pensioner Details**

Pensioner Address: \* State: Gujarat \*

- પેન્શન કેસો આઉટવર્ડ કરવા નીચે મુજબની સ્ક્રીન ખુલતા Pension Case/Service Certificate Select કરી કેસ આઉટવર્ડ કરવામાં આવે છે.

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=getOutwardCases&cmbSearchTextValue=Inward%20Type

Welcome Mr v j patel Assistant Junior Clerk Registry Branch 1, Directorate of Pension and Provident Fund

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IFMS INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 29 Mar, 14 16:33

Worklist Reports

**Outward Cases**

Search: Inward Type Pension Case Search

29 Records found, displaying all Records

Inward No	Inward Date	Inw Type	PPO No	Name	Ret Date	Pnsn Type	Doc Count	Rev No	Branch Name	Status	From
2033/2008	29/03/2014	PC	168839	RAMANBHAI THAKOR	31/05/2008	Sup	1	4	PR-4	OBJECTED	L V Khant
004757/03/2014	25/03/2014	PC		MAGANBHAI PARMAR	31/01/2014	Sup	1	0	PR-6	OBJECTED	B J Pandya
004490/03/2014	19/03/2014	PC		SURSINGBHAI DANOR	27/05/2009	Fam	1	0	PR-6	OBJECTED	B J Pandya
001261/01/2014	19/03/2014	PC	PR-2/02/2014/241908	VASUDEV NINAMA	28/02/2014	Sup	2	0	PR-2	APPROVE	s r vasava
001332/01/2014	12/03/2014	PC	PR-3/11/2008/241967	KRISHANALAL PANDYA	30/11/2008	Sup	2	0	PR-3	APPROVE	s r vasava
001404/01/2014	12/03/2014	PC	PR-2/02/2014/241560	HARISHKUMAR PANCHOLI	28/02/2014	Sup	2	0	PR-2	APPROVE	s r vasava
004104/03/2014	12/03/2014	PC	PR-6/01/2014/241930	UKEDBHAI TADVI	31/01/2014	Sup	1	0	PR-6	APPROVE	s r vasava
004061/03/2014	11/03/2014	PC	PR-2/02/2014/241799	MULUBHAI JADAV	28/02/2014	Sup	1	0	PR-2	APPROVE	s r vasava

Outward Close

Fields marked with \* are mandatory.  
All amounts are in INR.

TATA Consultancy Services Limited  
For IFMS (Treasury Online Bill Processing) specific Issues: 070-21257325 & 070-21257326

IFMS - Windows Internet Explorer

http://10.10.102.164/IFMS/ifms.htm?actionFlag=getOutwardCases&cmbSearchTextValue=Inward%20Type

Welcome Mr V J Patel Assistant Junior Clerk Registry Branch 1, Directorate of Pension and Provident Fund

Home Help Settings Change Password Logout

FINANCE DEPARTMENT GOVT. OF GUJARAT

IFMS INTEGRATED FINANCIAL MANAGEMENT SYSTEM

Press F8 to Open Menu. Use UP, DOWN, LEFT, RIGHT Arrow keys to navigate. Use Esc to Close Menu

Last Login 29 Mar, 14 16:33

Worklist Reports

Outward Cases

Search Inward Type Service Certificate Request Search

3 Records found, displaying all Records Records.

Inward No	Inward Date	Inw Type	PPO No	Name	Ret Date	Pnsn Type	Doc Count	Rev No	Branch Name	Status	From
004857/03/2014	26/03/2014	SC		JAYANTISHAI ROHIT	16/01/2014	Vol	1	0	PR-4	OBJECTED	V. C. Patel
017752/12/2013	26/03/2014	SC	SC/017752/12/2013	SHEELA TRIVEDI	31/03/2014	Vol	3	0	PR-4	APPROVE	V. C. Patel
004744/03/2014	25/03/2014	SC	SC/004744/03/2014	PRAPUL JOSHI	31/05/2014	Vol	1	0	PR-4	APPROVE	V. C. Patel

Outward Close

Fields marked with \* are mandatory.  
All amounts are in INR.

TATA Consultancy Services Limited  
For IFMS (Treasury Online Bill Processing) specific Issues: 079-23257325 & 079-23257326

Done

start IFMS Windows Inter...

Internet 100%

4:33 PM

(૩) પેન્શન કેસો ઈનવર્ડ કરી IFMS અંતર્ગત ફોર્વર્ડ કરી મેન્યુઅલી પેન્શન કેસો સંબંધિત શાખાઓને મોકલી આપવામાં આવે છે.



# **PFMS User Manual**

## **Expenditure Advance Transfer (EAT)**

Version 1.1

September, 2017

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Public Financial Management System  
Controller General of Accounts  
Department of Expenditure  
Ministry of Finance

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## **Version control**

<b>Version</b>	<b>Date</b>	<b>Designation/Office</b>	<b>Summary of Changes</b>
1.1	21September 2017	O/o CGA	Original Document

### 1. Purpose

The objective of Expenditure, Advance and Transfer (EAT) module of Public Financial Management System (PFMS) is to help Program Implementing Agencies (PIAs) in filing of expenditure, transferring funds, advances and its settlement.

The process of feeding the day to day transactions as recorded in the cash book of the PIA on the PFMS portal is called expenditure filing. A step by step guide for each activity is provided in detailed in this user manuals.

The following activities need to be completed by the Program Division (PD) for implementation of EAT:

- PIA Registration
- Hierarchy Mapping
- Identifying Components

Once PIA is registered on PFMS, it will receive an Agency Admin log in and password.

### 2. Steps involved in expenditure filing

#### 2.1 Login into PFMS with Admin credentials



Figure 1: Login to PFMS System

#### 2.2 Creation of Maker and Checker

(Refer User Manual – Role of Administrator)

## **2.3 Entering receipts of PIA**

The receipts of a PIA consists of opening balance, receipts from Central Government, receipts from other PIAs, receipts from State Government, returned by other PIAs, interest income, income from other sources, etc. All these details will be entered by the data operator and will be approved by the data approver.

### **2.3.1 Opening Balance**

The opening balance as per the cash book as on 1<sup>st</sup> April of the financial year is to be entered on the PFMS portal. This is a one-time exercise when the PIA starts filing expenditure on PFMS. In subsequent years, the opening balance will be automatically available in the system.

**Step1:** For entering opening balance, the data operator will login into PFMS portal and select **My Funds>Opening Balance** from the menu.

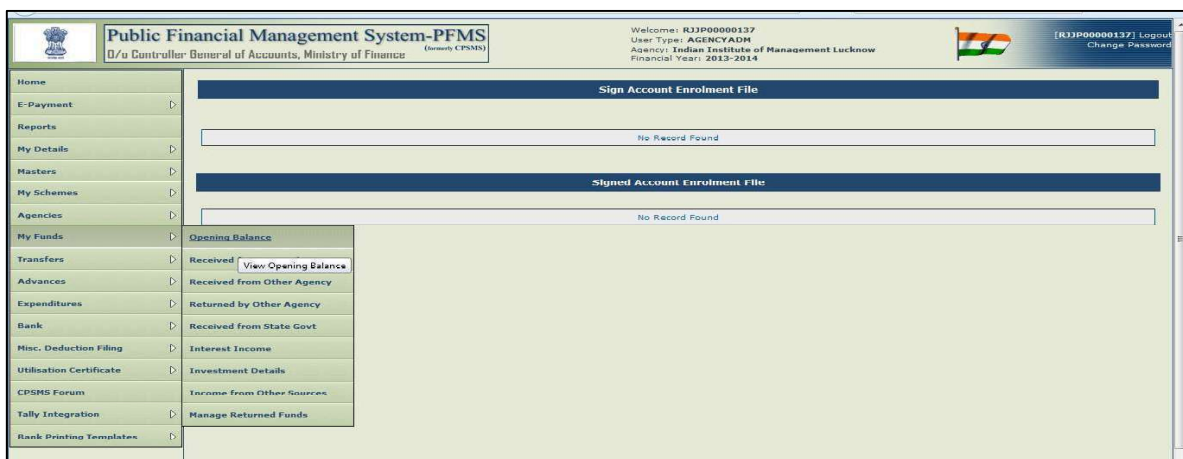


Figure 2: Entering Opening Balance

**Step2:** Click on **Add Opening Balance** button.

The screenshot displays the 'Manage Opening Balance' interface. On the left is a sidebar with navigation options. The main area contains search filters for Schemes, Bank Account, Project, and Status, each with a dropdown arrow. A 'Search' button is positioned below these filters. A section titled 'Selected Opening Balances' indicates 'No Record Found'. At the bottom of the main area, the 'Add Opening Balance' button is highlighted with a red rectangle.

Figure 3: Adding Opening Balance Button

**Step3:** Select **Scheme** to which the opening balance is to be added from the drop down list.

**Step4:** Select the **Bank Account** in which the opening balance is to be added (For Cash Balance, select Cash option from the drop down).

**Step5:** Available balance in the system against the bank account selected will be displayed by the system. At the start of Expenditure Filing by PIA, the available balance will be Zero.

**Step6:** Enter **Opening Balance Amount**.

**Step7:** Select **Opening Balance Date** (This should be the date of beginning of EAT Module on PFMS).

**Step8:** Select **Transaction Type** (**Component Wise** option is for entering the opening balance against each and every component whereas **Bulk** option is for entering the opening balance against all components).

**Step9:** Select **'Is Reversal Entry'** check box option for making a reverse entry (deduction) from opening balance entered.

**Step10:** After entering all the details, click on **Save** button to save the opening balance in the system.

The screenshot shows the 'Bulk Opening Balance Add' form in the PFMS interface. The left sidebar contains a menu with options like Home, E-Payment, Reports, My Details, Masters, My Schemes, Agencies, My Funds, Transfers, Advances, Expenditures, Bank, Misc. Deduction Filing, Utilisation Certificate, CPSMS Forum, Tally Integration, and Bank Printing Templates. The main form area has the following fields: Schemes (dropdown), Bank Account (dropdown), Available Balance (text field), Opening Balance Amount (text field with a note '(Amount should not be less than or equal to Zero)'), Opening Balance Date (calendar icon), Transaction Type (radio buttons for Component Wise and Bulk), and Is Reversal Entry (checkbox). A red box highlights the 'Save' button.

Figure 4: Saving Opening Balance Details

**Step11:** A message “**Opening balance saved successfully**” will be displayed.

The screenshot shows the 'Bulk Opening Balance Add' form with a success message 'Opening balance saved successfully' displayed in a red box at the top. The form fields are: Schemes (\* dropdown), Project (\* dropdown), Bank Account (\* dropdown), Available Balance For Selected A/C (text field), Opening Balance Amount (\* text field with a note '(Amount should not be less than or equal to Zero)'), Opening Balance Date (\* calendar icon), Transaction Type (radio buttons for Component Wise and Bulk), and Is Reversal Entry (checkbox). The 'Save' and 'Back' buttons are at the bottom.

Figure 5: Confirmation on Successful Saving of Opening Balance Details

Once the data is submitted by the data operator (Maker), it will be sent to Data Approver (Checker) for his approval. The steps are as under:

**Step12:** Data approver will log in and go to **My funds>Opening Balance**. The opening balance submitted by data operator (Maker) will be displayed in the page.

**Step13:** Click on **Bulk** button under **Scheme Component** to open the opening balance details page.

Figure 6: Details of Opening Balance

**Step14:** Verify the details of opening balance.

**Step15:** The approver can approve/reject/cancel transaction by clicking on **Approve/Reject/Cancel Transaction** button.

Figure 7: Approval/Rejection/Cancellation of Transaction

**Note:** The balance in the selected bank account for opening balance will be inflated to the extent of approved opening balance amount.

In case entry is 'Rejected' by checker, it can be edited and re-submitted by the data operator to him for his approval.

## 2.3.2 Receipts from Central Government

As and when the fund is released by the central government directly to the PIA, it becomes visible as shown below:

**Step1:** Select **My Fund> Received from Central Govt.** from the menu. A new page will open showing all the details of sanctions/releases from Central Government.

**Step2:** Click on the **Sanction Number** to verify the details.

Home	Manage Funds From Central Government				
E-Payment	Schemes : 0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME				
Reports	Bank Account : -Select-				
My Details	Status : -Select-				
Masters	Search				
My Schemes	Sanction Number	Scheme	Received Date	Received Amount	Status
Agencies	L-15060/4/2013/RE-VII-SI.No.31	0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME	15/05/2013	12576262000.00	Released
My Funds	L-15060/4/2013/RE-VII-SI.No.17	0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME	23/04/2013	4310000000.00	Released
Transfers	L-15060/4/2013/RE-VII-SI.No.74	0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME	19/09/2013	645136000.00	Released
Advances	Opening Balance				
Expenditures	Received from Central Govt				
Bank	Received from Other Agency				
Misc. Deduction Filing	Returned by Other Agency				
Utilisation Certificate	Received from State Govt				
CPSMS Forum	Interest Income				
Tally Integration	Investment Details				
Bank Printing Templates	Income from Other Sources				
	Manage Returned Funds				

Figure 8: Details of Sanctions from Central Government

**Step3:** Click on “**Received**” button to receive the amount. In case the sanction does not pertain to the PIA, it can be returned by clicking on “**Not Received**”. (This action is to be done only by the **Agency Administrator**).



	<b>Public Financial Management System-PFMS</b> (Formerly CPMS) D/o Controller General of Accounts, Ministry of Finance	Welcome: commissioner rd User Type: AGENCYADM Agency: MADHYA PRADESH STATE EMPLOYMENT GUARANTEE BHOPAL FINANCIAL YEAR: 2013-2014	 [commissioner.rd] Logout Change Password	
Home	<b>Funds From Central Government</b>			
E-Payment	Scheme Name/Code : MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME			
Reports	Sanction Number : L-15060/4/2013/RE-VII-SI.No.31			
My Details	Sanction Date : 14/05/2013			
Masters	Sanction Amount : 12576262000			
My Schemes	Status : Released			
Agencies	Remarks : <input type="text"/>			
My Funds	<b>Instrument Details</b>			
Transfers	Instrument Type : RTGS			
Advances	Instrument Number : P1314000000572			
Expenditures	Instrument Date : 12/05/2013			
Bank	<b>Bank Details</b>			
Misc. Deduction Filing	Account Number : 900710210000005			
Utilisation Certificate	Bank Name : BANK OF INDIA			
CPSMS Forum	<input type="button" value="Received"/> <input type="button" value="Not Received"/> <input type="button" value="Back"/>			
Tally Integration				
Bank Printing Templates				

Figure 9: Receipt to PIA

### 2.3.3 Receipts from other PIAs

To receive the funds transferred by parent PIA/higher level PIA. The steps are as follows:

**Step1:** Select **My Funds>Received from other agencies** from the menu. All the releases will be displayed sanction-wise.

The screenshot shows the PFMS web application interface. The header includes the system name 'Public Financial Management System-PFMS' and the user's role 'D/o Controller General of Accounts, Ministry of Finance'. The main content area is titled 'Manage Funds Received From Other Agency'. It contains a form with the following fields: 'Schemes' (dropdown menu showing '0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME'), 'Bank Account' (dropdown menu), and 'Status' (dropdown menu). A 'Search' button is located below these fields. Below the search area, there is a table titled 'Selected Funds' which currently displays 'No Record Found'. The left sidebar contains a list of navigation options, including 'My Funds', 'Transfers', 'Advances', 'Expenditures', 'Bank', 'Misc. Deduction Filing', 'Utilisation Certificate', 'CPSMS Forum', 'Tally Integration', and 'Bank Printing Templates'.

Figure 10: Fund Received from Parent/Higer PIA

**Step2:** Rest all the other steps are similar as explained in the case of receipt from Central Govt. (2.3.2).

**Note:** This action is to be done only by the data operator (Maker).

### 2.3.4 Return from Other PIAs

This menu will be used in case the unutilized fund is returned by the child PIA.

### 2.3.5 Receipts from State Governments

As the releases by the State Government to the PIA are not processed through PFMS, it has to be entered separately. For entering receipts from state government, the steps are as follows:

**Step1:** Select **My Funds>Received from State Govt.** from the menu.

**Step2:** Click on **“Add new fund from State Government”** to enter the details of fund received from the State Government.

The screenshot shows the PFMS interface. On the left is a navigation menu with options like Home, E-Payment, Reports, My Details, Masters, My Schemes, Agencies, My Funds, Transfers, Advances, Expenditures, Bank, Misc. Deduction Filing, Utilisation Certificate, CPSMS Forum, Tally Integration, and Bank Printing Templates. The main area is titled 'Manage Funds From State Government'. It contains a search bar with dropdowns for Scheme (0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME), Bank Account (Select), and Status (Select), followed by a Search button. Below the search bar, a red box highlights the 'Add New Fund From State Government' button. The status 'No Records Found' is displayed below the button.

Figure 11: Add New Fund from State Government

**Step3:** Select **Scheme** from the drop down list.

**Step4:** Select **Bank Account** for adding the State Share.

**Step5:** Enter **Sanction Number** of the State Govt. Sanction Letter.

**Step6:** Select **Sanction Date** from the Date picker.

**Step7:** Enter **Sanction Amount**.

**Step8:** Select **Instrument Type**.

**Step9:** Select **State Gov. Scheme** from the drop down list.

**Step10:** Enter **Instrument Number**.

**Step11:** Enter drawee's name in **Favouring** column.

**Step12:** Select **Instrument Date** from the Date picker.

**Step13:** Give **Remarks**, if any

**Step14:** Click on '**Save**' button.

The screenshot shows the 'Funds From State Government' form. It contains the following fields: Scheme (0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME), Bank Account (Select), Sanction Number (text input), Sanction Date (04/03/2014), Sanction Amount (text input), Instrument Type (Select), State Gov. Scheme (Other), Instrument Number (text input), Favouring (text input), Instrument Date (04/03/2014), and Remark (text input). At the bottom right, the 'Save' button is highlighted with a red box, next to a 'Cancel' button.

Figure 12: Adding Details to New Fund from State Government

**Step15:** A message "**Record saved successfully**" will appear on the screen.

## PFMS User Manual –Expenditure, Advance and Transfer Ver 1.1

Public Financial Management System-PFMS  
(Formerly CPMS)

Welcome: commissioner rd  
User Type: AGENCYADM  
Agency: MADHYA PRADESH STATE EMPLOYMENT GUARANTEE BHOPAL  
Financial Year: 2013-2014

[commissioner.rd] Logout  
Change Password

Home  
E-Payment  
Reports  
My Details  
Masters  
My Schemes  
Agencies  
My Funds  
Transfers  
Advances  
Expenditures  
Bank  
Misc. Deduction Filing  
Utilisation Certificate  
CPMS Forum  
Tally Integration  
Bank Printing Templates

**Funds From State Government**

Record saved successfully

Scheme : -Select-  
Bank Account : -Select-  
Sanction Number :  
Sanction Date :  
Sanction Amount :  
Instrument Type : -Select-  
State Gov. Scheme : -Select-  
Instrument Number :  
Favouring :  
Instrument Date :  
Remark :  
Save Back

Figure 13: Saving Details of New Fund from State Government

**Step16:** Click on back button or go to **My funds>Receipt from state government** to open Manage Funds from State Government page. Click on the “**State Scheme**” hyperlink to view details.

Public Financial Management System-PFMS  
(Formerly CPMS)

Welcome: commissioner rd  
User Type: AGENCYADM  
Agency: MADHYA PRADESH STATE EMPLOYMENT GUARANTEE BHOPAL  
Financial Year: 2013-2014

[commissioner.rd] Logout  
Change Password

Home  
E-Payment  
Reports  
My Details  
Masters  
My Schemes  
Agencies  
My Funds  
Transfers  
Advances  
Expenditures  
Bank  
Misc. Deduction Filing  
Utilisation Certificate  
CPMS Forum  
Tally Integration  
Bank Printing Templates

**Manage Funds From State Government**

Schemes : 0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME  
Bank Account : -Select-  
Status : -Select-  
Search

State Scheme	Account Number	Sanction Number	Sanction Date	Sanction Amount	Status
Other	63040000770	2014 MONILGA	04/03/2014	120000.00	Created
Other	63040890778	2014/CPMS/	04/03/2014	100000.00	Created

Add New Fund From State Government

Figure 14: Receipt of Fund from State Government

**Step17:** Verify the details and click on **Submit for Approval** button.

## PFMS User Manual –Expenditure, Advance and Transfer Ver 1.1

**Funds From State Government Details**

Sanction Number: 2014-MGNREGA  
 Sanction Date: 04/03/2014  
 Scheme Name: MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME  
 Bank Account: 63040890778 - MADHYA PRADESH STATE EMPLOYMENT GUAR  
 Sanction Amount: 120000.00  
 Financial Year: 2014  
 State Scheme Name: Other  
 Payment Mode: Cash  
 Favoring: Commissioner, MGNREG  
 IFSC Code:  
 MICR Code:  
 Instrument Number:  
 Instrument Date: 04/03/2014  
 Status: Created  
 Remark: state share

Buttons: Edit, **Submit For Approval**, Cancel Transaction, Bank

Figure 15: Submission for Approval for Fund from State Government

**Step18:** The Data Approver will login and go to **My Funds> Received from State Government**. The fund details submitted by the data operator will appear on the screen with the status as **“Submitted”**.

**Step19:** Click on the **“State Scheme”** hyperlink to open the page.

**Manage Funds From State Government**

Schemes: 0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME  
 Bank Account: -Select-  
 Status: -Select-  
 Search

State Scheme	Account Number	Sanction Number	Sanction Date	Sanction Amount	Status
Other	63040890778	2014/CPSMS/	04/03/2014	100000.00	Submitted

Buttons: Status, Add New Fund From State Government

Figure 16: Displaying Submitted Fund Details

**Step20:** After verifying the details, the data approver can approve, reject or cancel the transaction by clicking on the **Approve/Reject/Cancel Transaction** button with remarks.

Public Financial Management System-PFMS  
(Formerly CPSMS)

Welcome: commissioner rd  
User Type: AGENCYADM  
Agency: MADHYA PRADESH STATE EMPLOYMENT GUARANTEE BHOPAL  
Financial Year: 2013-2014

[commissioner.rd] Logout  
Change Password

Home  
E-Payment  
Reports  
My Details  
Masters  
My Schemes  
Agencies  
My Funds  
Transfers  
Advances  
Expenditures  
Bank  
Misc. Deduction Filing  
Utilisation Certificate  
CPSMS Forum  
Tally Integration  
Bank Printing Template

**Funds From State Government Details**

Sanction Number: 2014-MGNREGA  
Sanction Date: 04/03/2014  
Scheme Name: MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME  
Bank Account: 63040890778 - MADHYA PRADESH STATE EMPLOYMENT GUAR  
Sanction Amount: 120000.00  
Financial Year: 2014  
State Scheme Name: Other  
Payment Mode: Cash  
Favoring: Commissioner, MGNREG  
TPG Code:  
MICR Code:  
Instrument Number:  
Instrument Date: 04/03/2014  
Status: Submitted  
Remark: state share

Approve Reject Cancel Transaction Back

Figure 17: Approval/Rejection/Cancellation of Fund Transaction

### 2.3.6 Interest Income

This menu is used for capturing periodical interest receipt from Banks. The steps for capturing interest income are as below:

**Step1:** Go to **My Funds>Interest Income**.

**Step2:** **Manage Interest Income** page will get displayed on the screen.

**Step3:** Click on **Add Interest Income** button to capture the interest income details.

Bank Account : 50000001101-DOO - ALLAHABAD BANK  
Status : -Select-  
Search

**Selected Interest Incomes**

No Records Found

Add Interest Income

Opening Balance  
Received from Central Govt  
Received from Other Agency  
Returned by Other Agency  
Received from State Govt  
Interest Income  
Investment Details View Interest Income  
Income from Other Sources  
Manage Returned Funds

Figure 18: Interest Income from Bank

**Step4:** Select **Bank Account** to which interest income is to be added.

**Step5: Period From:** Select the date from when interest is due.

**Step6: Period To:** Select the date up to which interest is accrued.

**Step7:** Enter **Income from Interest** amount for the selected period.

**Step8:** Select **Scheme** against which the interest amount is to be accounted for.

**Step9: Amount:** Enter the interest amount against a particular scheme.

The screenshot shows the 'Interest Income' submission form. On the left is a sidebar menu with options like E-Payment, Scholarship Management, Reports, My Details, Masters, My Schemes, Agencies, My Funds, Transfers, Advances, Expenditures, Bank, Misc. Deduction Filing, Utilisation Certificate, CPSMS Forum, and Register / Track Issue. The main form area has a header 'Instructions' with a note: 'The interest amount already included in the opening balance should not be reflected here.' Below this is the 'Interest Income' section. It contains a 'BankAccount' dropdown set to '5000001101 - DDO - ALLAHABAD BANK', 'Period From' and 'Period To' date pickers both set to '22/08/2014', an 'Income From Interest' text field, a 'Schemes' dropdown set to '9268-SKILL DEVELOPMENT MISSION CENTRAL SECTOR', an 'Amount' text field, and a 'Remark' text area. At the bottom are 'Add', 'Submit', and 'Cancel' buttons.

Figure 19: Interest Income Details Submission

**Step10: Add:** Click on **Add** button which will display the **Scheme** and **Amount** details in a grid (If interest earned is against more than one scheme, the user may add more scheme and amount).

**Step11: Remarks:** Enter **Remarks**, if any.

**Step12: Submit:** Click on **Submit** button.

This screenshot shows the form after clicking the 'Add' button. The 'Income From Interest' field now contains '6000'. Below the 'Schemes' dropdown, a table has been populated with one row:
 

Scheme	Amount	Action
SKILL DEVELOPMENT MISSION CENTRAL SECTOR	6000.00	X

 The 'Remark' text area now contains 'Interest earned from Jan to June 2014'. The 'Submit' button is highlighted with a red rectangular box.

Figure 20: Interest Income (more than 1 scheme) detail submission

**Step13:** A message **“Interest income details saved successfully”** will be displayed.

**Step14:** Click on **Back** button or go to **My Funds> Interest Income** menu to open manage interest income page.

Figure 21: Interest Income Details Saved Successfully

**Step15:** The status of the transaction will be displayed as “**Created**”.

**Step16:** Click on the **Bank Account Number** hyperlink to submit the interest details for approval.

Bank Account Number	Amount	Period From	Period To	Status
60000001101	6000.00	01/01/2014	30/06/2014	Created

Figure 22: Updating Interest Details against Bank Account Number for Approval

**Step17: Edit:** Click on **Edit** button to edit the interest income details.

**Step18: Submit for Approval:** To submit the details for approval, click on **Submit for approval** button.

**Step19: Cancel Transaction:** To cancel the details, click on **Cancel Transaction** button.

The screenshot shows the 'Interest Income Details' page in the PFMS. The left sidebar contains a menu with options: Home, E-Payment, Scholarship Management, Reports, My Details, Masters, My Schemes, Agencies, My Funds, Transfers, Advances, and Expenditures. The main content area displays the following information:

- Bank Account : 50000001101
- Period From : 01/01/2014
- Period To : 30/06/2014
- Income From Interest : 6000.00
- Scheme : SKILL DEVELOPMENT MISSION CENTRAL SECTOR
- Amount : 6000.00
- Status : Created
- Remark : Interest earned from Jan to June 2014

At the bottom of the main content area, there are four buttons: **Edit**, **Submit For Approval**, **Cancel Transaction**, and **Back**. The **Edit**, **Submit For Approval**, and **Cancel Transaction** buttons are highlighted with red boxes.

Figure 23: Edit/Approval/Cancellation of Transaction

**Step20:** On successful submission of interest income details, a message “**Submitted successfully**” will be displayed on the screen and the status of the transaction will be displayed as **Submitted**. Also, the user can cancel the transaction at this stage (if required).

The screenshot shows the 'Interest Income Details' page after a successful submission. The status has changed to 'Submitted'. A red box highlights the message 'Submitted successfully' at the top of the main content area. The other details remain the same as in Figure 23. The buttons at the bottom are now 'Cancel Transaction' and 'Back'.

Figure 24: Successful Submission of Interest Details against Bank Account

### **Interest Income Approval**

To approve the interest income transaction submitted by the Data Operator, the steps are as follows:

**Step1:** Go to **My Funds > Interest Income. Manage Interest Income** page will appear on the screen.

Figure 25: Bank Account Status with Interest Income details Submitted

**Step2:** Interest Income submitted by Data Operator will displayed in this page. Click on **Bank Account Number** hyper link to open and verify the interest income details submitted by the operator.

**Step3: Approve:** Click on **Approve** button to approve the transaction or the transaction can be rejected by providing reason for rejection. Rejected transactions can be edited and submitted again by Data Operator for approval.

Figure 26: Approval/Rejection/Cancellation - Interest Income details

**Step4:** At the time of Approving/Rejecting/Cancelling the transaction, a pop-up window for Remark will appear. Enter **Remark** and click on **Confirm** button.

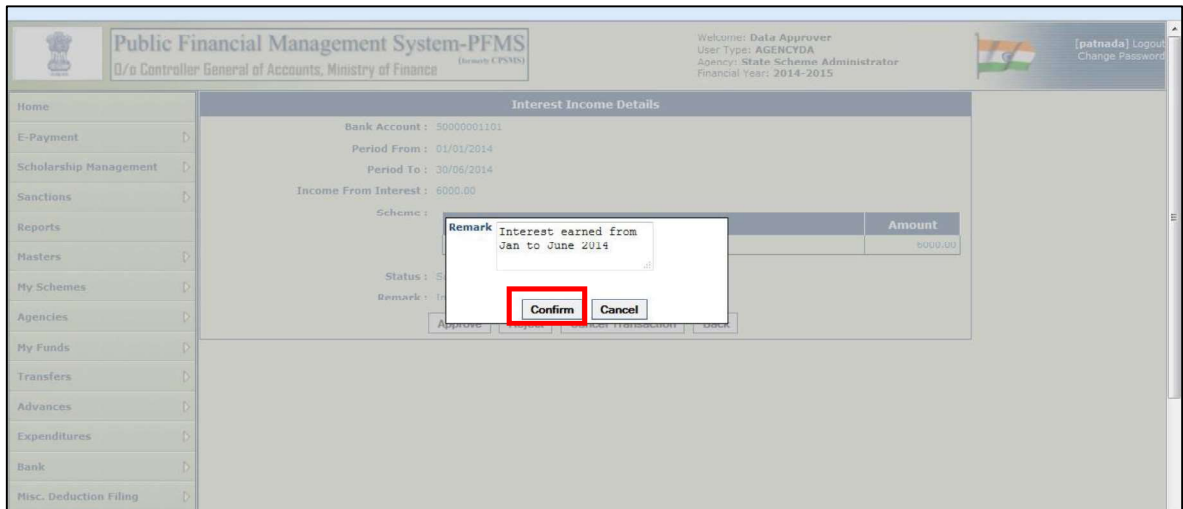


Figure 27: Putting Remark

**Step5:** A message “**Request has been Approve successfully**” will be displayed. The status of the transaction will be displayed as “**Approved**”.

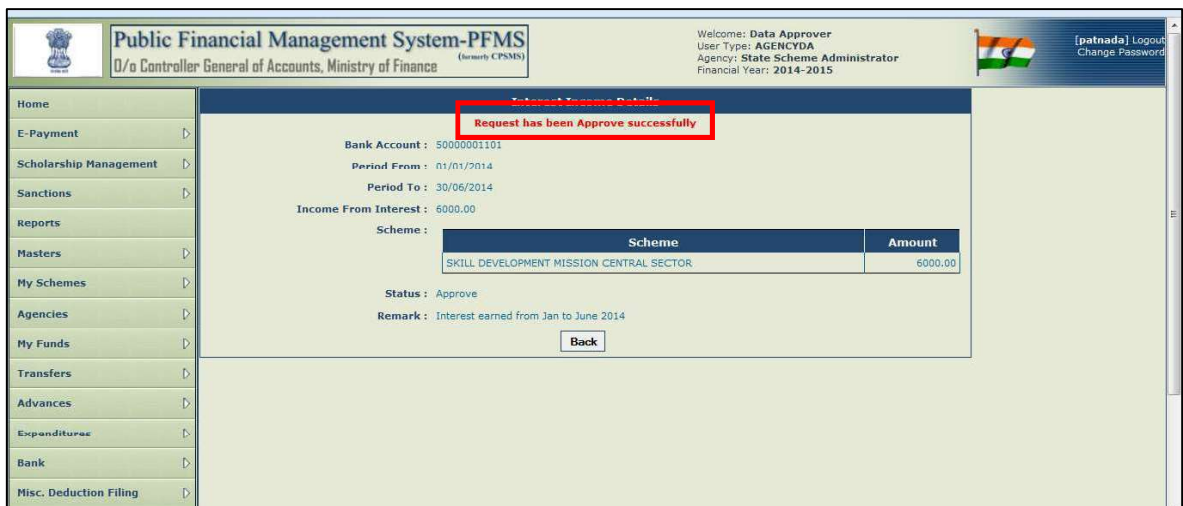


Figure 28: Approval Confirmation

### 2.3.7 Investment Details

If PIA makes any type of investment and any income arises from such an investment. The steps to capture such an income are as follows:

**Step1:** Go to **My Fund>Investment Details**. Manage Investment details page will open.

**Step2:** To add new investment details, click on **Add Investment Details** button.

Figure 29: Income from Investment – Adding Investment

**Step3: Investment Details** page will be displayed.

**Step4: Bank Account:** Select **Bank Account** from the drop down list.

**Step5: Investment Type:** Select Investment type from the drop down list.

**Step6: Investment Amount:** Enter **Investment Amount**.

**Step7: Scheme:** Select **Scheme** from the dropdown list.

Figure 30: Adding Investment Details

**Step8: Amount:** Enter **Amount** against each scheme.

**Step9:** Click on **Add** button. Scheme Amount details will be displayed in a grid. User can add more scheme and amount here. The total amount against all individual scheme should tally with Investment Amount column.

**Step10:** Enter **Remarks**, if any

**Step11:** After entering all the above details, click on **Submit** button.

**Public Financial Management System-PFMS**  
(formerly CPMS)

Welcome: Data Operator  
User Type: AGENCYDO  
Agency: State Scheme Administrator  
Financial Year: 2014-2015

[patnado] Logout  
Change Password

**Investment Details**

Bank Account : 50000001101 - DDO - ALLAHABAD BANK

Investment Type : Fixed Deposits

Investment Amount : 2000

Scheme : 9268-SKILL DEVELOPMENT MISSION CENTRAL SECTOR

Amount : 2000

**Add**

Scheme	Amount	Action
SKILL DEVELOPMENT MISSION CENTRAL SECTOR	2000.00	X

Remark: fixed deposit details

**Submit** **Cancel**

Figure 31: Submission of Investment Details

**Step12:** A message “**Investment Income details submitted successfully**” will be displayed.

**Step13:** Click on **Back** button or go to **My Funds>Investment Details** menu to open Manage Investment page. Click on **Bank Account Number** hyperlink to open and view the investment details entered.

**Public Financial Management System-PFMS**  
(formerly CPMS)

Welcome: Data Operator  
User Type: AGENCYDO  
Agency: State Scheme Administrator  
Financial Year: 2014-2015

[patnado] Logout  
Change Password

**Manage Investment**

Bank Account : 50000001101 - DDO - ALLAHABAD BANK

Status : --Select--

**Search**

Bank Account Number	Amount	Status	Created Date
<a href="#">50000001101</a>	2000.00	Created	25/08/2014
<a href="#">50000001101</a>	2000.00	Created	25/08/2014

**Add Investment Details**

Figure 32: Manage Investment Details

**Step14:** Data operator will verify the details and click on **Edit/Submit for Approval/Cancel Transaction** button. Once the transaction is **submitted for Approval** with remarks, the same will be available to data approver for approving the transaction.

**Public Financial Management System-PFMS**  
(formerly CPMS)

Welcome: Data Operator  
User Type: AGENCYDO  
Agency: State Scheme Administrator  
Financial Year: 2014-2015

[patnaso] Logout  
Change Password

**Investment Income Details**

Bank Account : 50000001101  
Investment Type : FixedDeposits  
Investment Amount : 2000.00

Scheme	Amount
SKILL DEVELOPMENT MISSION CENTRAL SECTOR	2000.00

Status : Created  
Remark :

Buttons: Edit, **Submit For Approval**, Cancel Transaction, Back

Figure 33: Investment Details Submitted for Approval

## Investment Income Approval

**Step15:** For approving the investment income details, the data approver will login and go to **My Funds>Investment Income** menu, will verify and approve the transaction in similar way as explained in other My Fund Transactions.

## 2.3.8 Income from Other Sources

In this section any other income of the PIA other than the sources explained above will be captured. The steps are as set out below:

**Step1:** Go to **My Fund>Income from other Sources>Add New**. Fund Received from other sources page will open.

**Public Financial Management System-PFMS**  
(formerly CPMS)

Welcome: TSC Bank  
User Type: AGENCYADM  
Agency: RURAL ELECTRIFICATION CORPORATION LTD  
Financial Year: 2016-2017

[reeladim] Logout  
Change Password

**Funds Received From Other Sources**

Scheme : \*  
Project : \*  
Bank Account : \*  
Fund Sources : \*  
Fund Type : \*  
Funds Received From : \*  
Ref No : \*  
Actual Transaction Date : \*  
Payment Mode : \*  
Favouring Of : \*  
Instrument Number : \*  
Instrument Date : \*  
Fund Amount : \*  
Narration :

Buttons: Add New, Submit, Cancel

Figure 34: Fund Received from Other Sources

**Step2:** Select **Scheme** from the drop down list.

**Step3:** Select **Project** from the drop down list. (Only in case project details are created in PFMS)

**Step4:** Select **Bank Account** against which income is to be added.

**Step5:** Select **Fund Sources** from the drop down list (The source of funds available will be World Bank, UNICEF, EMD, Security Deposit, Loan and Miscellaneous).

**Step6:** Select **Fund Type** from the drop down list (The available types are GIA, Donor and Loans & Advances).

**Step7:** Enter Department from which fund was received under **Funds Received from** column.

**Step8:** Enter **Reference Number**

**Step9:** Select **Payment Mode**.

**Step10:** Enter recipient details in **Favouring** column.

**Step11:** Enter **Instrument Number**.

**Step12:** Select **Instrument Date**.

**Step13:** Enter **Fund Amount**.

**Step14:** Enter **Remarks**, if any.

**Step15:** Click on **Submit** button.

The screenshot shows the 'Funds Received From Other Sources' form in the PFMS application. The left sidebar contains a menu with options like 'AdhocReports', 'Bharatkosh Report', 'Home', 'E-Payment', 'Reports', 'My Details', 'Masters', 'My Schemes', 'Agencies', 'My Funds', 'Transfers', 'Advances', 'Scheme Allocation', 'Expenditures', 'Bank', and 'Register/ Track Issuc'. The main form area has the following fields and values:

- Scheme : \* 9338 - DEEN DAYAL UPADHYAYA GRAM JYOTI YOJANA (DDUGJY)
- Project : --Select--
- Bank Account : \* 30808855220 - Rural Electrification Corporation Limited - STATE BANK OF INDIA
- Fund Sources : \* WorldBank
- Fund Type : \* Grant in aid
- Funds Received From : \* 01/01/2015
- Ref No : \* RefWorld
- Actual Transaction Date : \* 01/08/2016
- Payment Mode : \* DD
- Favouring Of : \* RECL
- Instrument Number : \* 125645
- Instrument Date : \* 01/01/2015
- Fund Amount : \* 100000 (Rupees one lakh(s) only)
- Narration : \*
- Voucher Number : \*

At the bottom right, there are 'Submit' and 'Cancel' buttons. The 'Submit' button is highlighted with a red box.

Figure 35: Submission of Fund Details

**Step16:** A message “**Record saved successfully**” will be displayed.

**Step17:** Click on **Back** button or go to **My Fund>Income from Other Sources** menu to open the Mange income from other sources page to submit the income details created by the operator. Click on **Scheme** hyper link to open and view the income details.

Figure 36: Manager Income from Other Source – Schemes Listing

**Step18:** Verify the details and click on **Edit, Submit for Approval, Cancel** button. After submitting for approval, the income details will be available to data approver level for approving, rejecting, cancelling the details.

### Approve Income from Other Sources

Approver will login and **Approve, Reject** or **Cancel** the transaction after verifying the details as in other cases of incomes.

## 2.4 Transferring funds to the child / lower level PIA

Fund can be transferred individually or in bulk by parent PIA to the child PIA. Bulk transfer means transfer of funds simultaneously to more than one PIA. Bulk customization master is created for bulk transfer.

### Bulk customization

**Step1:** Go to **Masters>Bulk Customization>Manage**. A window for creation of bulk customization will open. Separate customization for each level of PIAs are required to be created.

Figure 37: Bulk Customization – Adding Investment Details

**Step2:** Fill in the required details as below:

- a) Select **Scheme** from the drop down list for which Bulk Customization is to be created.
- b) Select **Module**. It can be fund Expenditure/Fund Advances/Funds Transfer. For funds transfer, select “**Funds Transfer**”.
- c) Select **Level Type** by clicking on the radio button (Rural/Urban).
- d) Select the **level** of PIA to which fund is to be transferred (District, Block/Tehsil, Panchayat/Town, Village/Ward). Separate customization have to be created for each level.
- e) Once the scheme is selected, type the Name of the customization for reference.
- f) Select type of transaction for which the customization is to be created under **Transaction Type** by clicking on the radio button (Component Wise/Bulk/Default Component).
- g) If the user clicks on transaction type “**Component Wise**”, scheme component list gets populated and user can select any or all the components/subcomponents of the scheme as required or select **Bulk** if he wants to use all the components for the fund Transfer.
- h) **Default Amount** is an optional field. User can enter the amount in this column if the transferring amount is same for all or most of the PIAs. The amount can be edited at the time of fund transfer.
- i) Select **Payment Mode** through which the payment will be made. The modes of payment available are:
  - Cheque
  - DD
  - ECS
  - RTGS
  - E payment using Print Payment\*
  - E Payment using Digital Signature\*
  - E Payment Using Internet Banking\*

(\*e-payment option will be available for selection only if the concerned bank account has been activated for e-payment authorization).

**Step3: Save:** Once all the above details are entered, click on ‘**Save**’ button to save the details.

Bulk customization so created will appear at the fund transfer window for selection at the time of transferring the fund.

**Scheme Bulk Customization**

Scheme : 0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE  
 Name : TRANSFER TO DISTRICTS IN M.P.

Transaction Type : ☒ Component Wise ☐ Bulk ☐ Default Component

Scheme Component :

- ☒ Bulk
  - ☒ Wages
  - ☒ Unskilled Workers
  - ☒ Skilled Workers
  - ☒ Semi skilled
  - ☐ Administrative expenses
  - ☐ Salary and allowance of Programme Officers & sup
  - ☐ Work site facilities
  - ☐ Travelling expenses

Default Amount : 1000 (optional)

Payment Mode : ☐ ALL ☐ Cheque DD ☒ RTGS ☐ ECS

Save Cancel

**Manage Scheme Bulk Customization**

☒ Enabled ☐ Disabled

Figure 38: Bulk Customization Details

**Step4:** A message “**Record saved successfully**” will appear on the screen. Also, the customization will appear in a grid.

**Scheme Bulk Customization**

Record saved successfully

Scheme : 0822 - MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE  
 Name :

Transaction Type : ☐ Component Wise ☐ Bulk ☐ Default Component

Default Amount : (optional)

Payment Mode : ☐ ALL ☐ Cheque DD ☐ RTGS ☐ ECS

Save Cancel

**Manage Scheme Bulk Customization**

☒ Enabled ☐ Disabled

Customization Name	Module	Scheme Name	Default Amount	DELETE
TRANSFER TO DISTRICTS IN M.P.	Funds Transfer	MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME	1000.00	X

Figure 39: Bulk Customization Details Submitted Successfully

## 2.4.1 Manage Bulk Customization

**Step1:** Select **Masters>Bulk Customization>Manage**.

## PFMS User Manual –Expenditure, Advance and Transfer Ver 1.1



Figure 40: Managing Bulk Customization

**Step2:** The following screen will appear, clicks on **“Enabled”** radio button under Manage Scheme Bulk Customization, a list of customizations with details (Customization Name, Module, Scheme Name and Default Amount) will appear on screen.

The screenshot shows the 'Manage Scheme Bulk Customization' screen. The 'Scheme' is set to '9150 - NATIONAL HEALTH MISSION INCLUDING NRHM'. The 'Module' is set to 'Funds Transfer'. The 'Level Type' is set to 'Rural'. The 'Payment Mode' is set to 'EPaymentUsingPrintAdvice'. The 'Default Amount' is set to '100.00'. The 'Manage Scheme Bulk Customization' section shows a table of customizations.

Customization Name	Module	Scheme Name	Default Amount	DELETE
Bulk 2015	Funds Transfer	NATIONAL HEALTH MISSION INCLUDING NRHM	100.00	X
TRANSFER TO BLOCKS IN UJJAIN	Funds Transfer	NATIONAL HEALTH MISSION INCLUDING NRHM	100.00	X
ADVANCES TO BL	Funds Advance	NATIONAL HEALTH MISSION INCLUDING NRHM	100.00	X

Figure 41: Enabling List of Customization

## 2.4.2 View Bulk Customization

Customization Name	Module	Scheme Name	Default Amount	DELETE
Bulk 2015	Funds Transfer	NATIONAL HEALTH MISSION INCLUDING NRHM	100.00	X

Figure 42: View Bulk Customization

## 2.4.3 Edit Existing Customization

**Step1:** Click on a specific Customization name, the following details for customization will be able for editing:

- Name
- Vendors
- Default Amount
- Payment mode

**Step2:** Edit the details and click on **Update** button to update the details.

Customization Name	Module	Scheme Name	Default Amount	DELETE
Bulk 2015	Funds Transfer	NATIONAL HEALTH MISSION INCLUDING NRHM	100.00	X

Figure 43: Editing Bulk Customization

**Step3:** A message **“Record saved successfully”** will appear on the screen. User can Save/Disable/cancel the customization. Click on **Save** button to save the

customization. To disable the selected customization click on '**Disable**' button and to cancel the changes click on '**Cancel**' button.

Figure 44: Updating Bulk Customization

**Note:** If any Transfer of fund to another PIA has been created against a Bulk Customization, the user will not be able to delete the customization and a message “**Funds Transfer has been made against this customization so it cannot be deleted**” will appear on the screen.

#### 2.4.4 Bulk Customization- Urban Level Type

The Process flow for the Bulk Customization for Urban is same as above. However, when Module Type is selected as Urban and Transaction Type as Bulk Customization, the levels available for selection will be District, Tehsil, Town and Ward.

Customization Name	Module	Scheme Name	Default Amount	DELETE
Tfrs to DLAs	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JIIT) CENTRALLY SPONSORED	100000.00	✗
all district	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JIIT) CENTRALLY SPONSORED	100000.00	✗
cpms	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JIIT) CENTRALLY SPONSORED	500000.00	✗
bhupal	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JIIT) CENTRALLY SPONSORED	30000.00	✗
xyz	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JIIT) CENTRALLY SPONSORED	800000.00	✗

Figure 45: Scheme Bulk Customization - Urban

#### 2.4.5 Scheme Bulk customization-Urban

After clicking on the save button, the record is saved successfully.

**Scheme Bulk Customization**  
Record saved successfully

Scheme :

Name :

Transaction Type: ☐ Component Wise ☐ Bulk ☐ Default Component

Default Amount :  (optional)

Payment Mode: ☐ ALL ☐ Cheque ☐ DD ☐ RTGS ☐ ECS

Module : ☐ Funds Expenditure ☐ Funds Advance ☐ Funds Transfer

**Manage Scheme Bulk Customization**  
☒ Enabled ☐ Disabled

Customization Name	Module	Scheme Name	Default Amount	DELETE
Tfrs to DLAs	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JET) CENTRALLY SPONSORED	100000.00	X
all district	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JET) CENTRALLY SPONSORED	100000.00	X
cpms	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JET) CENTRALLY SPONSORED	500000.00	X
bhogal	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JET) CENTRALLY SPONSORED	30000.00	X
xyz	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JET) CENTRALLY SPONSORED	800000.00	X
Bulk Customization _Urban	Funds Transfer	NATIONAL RURAL HEALTH MISSION ( NRHM & JET) CENTRALLY SPONSORED	50000.00	X

1/2

Figure 46: Saving Bulk Customization Updates

## 2.4.6 Transfer: Fund Transfer

**Step1:** Go to **Transfers>Add New**

**Public Financial Management System-PFMS**  
O/o Controller General of Accounts, Ministry of Finance (formerly CPSMS)

Home  
E-Payment  
Reports  
My Details  
Masters  
My Schemes  
Agencies  
My Funds  
Transfers  
Advances  
Expenditures  
Bank  
Misc. Deduction Filing  
Utilisation Certificate  
CPSMS Forum  
Tally Integration  
Bank Printing Templates

The following table shows the summary of Agency according to status details of Agency in a status. Click on the corresponding status.

**Agency Type**  
[Approved Agency](#)

**Scheme**  
[NATIONAL RURAL HEALTH MISSION \( NRHM & JET\) CENTR](#)

**Age**

**Add New**

Figure 47: Add New Transfer Type

**Step2:** The “**Funds Transfer**” screen will appear. A PIA can transfer funds to its lower level PIAs individually or in bulk mode. (The transfer can be made by the parent PIA to a child PIA only if the child PIA is registered (automatic mapping). For individual transfer, fill the fields displayed on the screen.

**Step3:** Select **Scheme** from the drop down list.

**Step4:** Select **Bank Account**.

**Step5: Letter/ Office order no:** Enter Letter/Office order number.

**Step6: Letter/Office order Date:** Enter Letter/Office Order date.

**Step7:** Select **Transaction Type**.

**Step8:** Select **Agency** by clicking on hyperlink or by providing the scheme code.

**Step9:** Enter the **Purpose for transfer**.

**Step10:** Click on **Submit** button.

For adding payee details please refer **Step11**.

Figure 48: Submission of Fund Transfer Details of Individual PIAs without selecting bulk customization

In case of **Bulk Fund Transfer**, first select the **Scheme** and then select the already created **Customization Name** and then enter the below details on **Funds Transfer Bulk Uploading** page.

- Select **Scheme** from the drop down list for which transfer details are to be created.
- Click on **Customization Name** hyperlink. All the PIAs registered at the level of selected customization will get displayed.
- Select **Bank Account**. On selection of bank account, the available balance in the selected bank account will be displayed.
- **Letter/ Office order no:** Enter Letter/Office order number.
- **Letter/Office order Date:** Enter Letter/Office Order date.
- **Actual Transaction Date:** Enter Actual Transaction date. This can be equal to or greater than the Letter/Office Order date.
- **Transferring amount:** Enter transfer amount. User needs to specify the sum of amount for all the selected PIAs in the Transferring Amount field. This value should be equal to the amount displayed in Net Amount field; otherwise User will be prompted to enter correct value.
- **Narration:** Mention purpose of transfer
- **Set Default component:** This is an optional field. Select checkbox for component from the drop down list. Also, select check box of the required Agency Name from the list. The component/s so selected will be displayed by default against all PIAs selected for transferring fund.

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- **Total:** Enter amount against each component in this field.
- **Add Component:** After all the details have been entered for one component under a scheme, he can add more components from the grid and the net amount should be same as the transferring amount. The Net Amount field displays the sum of amount for all the selected PIAs.

Figure 49: Funds Transfer Bulk Uploading Screen

- After all the details are entered, click on '**Submit**' button. The following page with voucher number will be displayed. Click on '**OK**' to continue.

Figure 50: Save Fund Transfer Detail, Displaying Voucher Number

**Note:** Steps for adding payee details are same for individual transfer and bulk transfer.

**Step11:** A message “**Amount being transferred saved successfully, Do you want to proceed with payee details?**” will appear on the screen. Click on “**Yes**” button to add payee details.

<input type="checkbox"/>	MCH Alappuzha		
<input type="checkbox"/>	NHM GOVT MEDICAL COLLEGE ERANKULAM		
<input type="checkbox"/>	W C HOSPITAL JSSK		
<input type="checkbox"/>	AVCH Poojappura		
<input type="checkbox"/>	DHS NEW kannaur		
<input type="checkbox"/>	DISTRICT HEALTH SOCIETY THRISSUR		
<input type="checkbox"/>	DHS, KANNUR		
<input type="checkbox"/>	State Health & Family Society		
<input type="checkbox"/>	nclp luck		
<input type="checkbox"/>	District Health Societies		
<input type="checkbox"/>	DHS Trivandrum		
<input type="checkbox"/>	XOYZ01		
<input type="checkbox"/>	prachiv		
<input type="checkbox"/>	DISTRICT HEALTH SOCIETY		

Amount being transferred saved successfully  
Do you want to proceed with payee details?

Figure 51: Amount Transfer Confirmation

**Step12:“Payee Details”** will appear on the screen. Select **Account No.** (In case PIA have more than one account) and instrument type (Cheque/DD/RTGS/ECS/PPA/ Digital Signature) and click on “Add” button. Then fill the instrument details and date and click on **NEXT** button.

Payee Details			
Letter/Office Order No. : juyjujh			
Voucher Number : BT-2017-18-107			
Uploaded Sanction Letter :			
Letter/Office Order Date : 31/08/2017			
Agency : State Health & Family Welfare Society, Kerala			
Scheme Name/Code : NATIONAL HEALTH MISSION			
Project :			
Bank Account : 626201085449			
Bank Name : ICICI BANK LTD			
IFSC Code : ICIC0006262			
Transferring Amount : 2000.00			
Status : PendingPayeeDetails			
Purpose Of Transfer: :			
Agency Name	Account No.	Total Amount	Instrument Type
IS HLTH&FAM WEL SOC A.KERAM-LLEPPEY	000601000254 - DIST HLTH&FMLY ▼	2000.00	<input checked="" type="radio"/> EPaymentUsingPrintAdvice
<input type="button" value="Next"/>			
<input type="button" value="Confirm"/> <input type="button" value="Reset"/> <input type="button" value="Back"/>			

Figure 52: Adding Payee Details

**Step13:** In case multiple components have been selected, mention ‘**Narration for Passbook**’ in the space provided.

**Step14:** Click on “**Is deduction**” check box to enter deductions. Click on “**Confirm**” button.

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Payee Details							
Letter/Office Order No. : juyjugh							
Voucher Number : BT-2017-18-107							
Uploaded Sanction Letter :							
Letter/Office Order Date : 31/08/2017							
Agency : State Health & Family Welfare Society, Kerala							
Scheme Name/Code : NATIONAL HEALTH MISSION							
Project :							
Bank Account : 626201085449							
Bank Name : ICICI BANK LTD							
IFSC Code : ICIC0006262							
Transferring Amount : 2000.00							
Status : PendingPayeeDetails							
Purpose Of Transfer :							
Agency Name	Account No.	Total Amount	Instrument Type				
DIS HLTH&FAM WEL SOC A.KERALAM-ALLEPPEY	060601000254 - DIST HLTH&FMLY ▼	2000.00	<input checked="" type="radio"/> EPaymentUsingPrintAdvice				
Next							
E- Payment Details							
Agency Name	Party Name	IFSC Code	Party Account No	Amount	NarrationForPassBook	IsDeduction	Deduction Details
DIS HLTH&FAM WEL SOC A.KERALAM-ALLEPPEY	DIST HLTH&F	ICIC0000606	060601000254	2000.00		<input type="checkbox"/>	Add
<input type="button" value="Confirm"/> <input type="button" value="Reset"/> <input type="button" value="Back"/>							

Figure 53: Narration for Passbook

**Step15:** A message “Payee details saved successfully” will appear. Click on “Next” button.

Payee Details							
Letter/Office Order No. : juyjugh							
Voucher Number : BT-2017-18-107							
Uploaded Sanction Letter :							
Letter/Office Order Date : 31/08/2017							
Agency : State Health & Family Welfare Society, Kerala							
Scheme Name/Code : NATIONAL HEALTH MISSION							
Project :							
Bank Account : 626201085449							
Bank Name : ICICI BANK LTD							
IFSC Code : ICIC0006262							
Transferring Amount : 2000.00							
Status : PendingPayeeDetails							
Purpose Of Transfer :							
Agency Name	Account No.	Total Amount	Instrument Type				
DIS HLTH&FAM WEL SOC A.KERALAM-ALLEPPEY	060601000254 - DIST HLTH&FMLY ▼	2000.00	<input checked="" type="radio"/> EPaymentUsingPrintAdvice				
Next							
E- Payment Details							
Agency Name	Party Name	IFSC Code	Party Account No	Amount	NarrationForPassBook	IsDeduction	Deduction Details
DIS HLTH&FAM WEL SOC A.KERALAM-ALLEPPEY	DIST HLTH&F	ICIC0000606	060601000254	2000.00		<input type="checkbox"/>	Add
<input type="button" value="Confirm"/> <input type="button" value="Reset"/> <input type="button" value="Next"/>							

Figure 54: Saving Payee Details

**Step16:** The data operator has to submit the transfer transaction for approval by the data approver. Click on “Submit for Approval” button.

Funds Transfer Bulk Uploading Details									
Uploaded Sanction Letter :									
<div> <div>1 of 1</div> <div>Find   Next</div> </div>									
Transfer Details									
Letter/Office Order No: juyjujh				Letter/Office Order Date: 31-08-2017					
Voucher Name : BT-2017-18-107				Scheme Name: NATIONAL HEALTH MISSION					
Actual Transaction Date: 31-08-2017				Project:					
Bank Account: 626201085449				Purpose of Transfer:					
Transfer Amount: 2,000.00				Remark: Payee Details Filled					
Status: Created									
Receiving Vendors:	Receiving Party Name	Payment Mode	Bank Name	Account Number	Deduction Amount	Net Amount	Transfer Amount	Component Details	
	Name							Name	Amount
	DIS HLTH&FAM WEL SOC A.KERALAM-ALLEPPEY	EPaymentUsingPrintAdvice	ICICI BANK LTD	060601000254	0.00	2,000.00	2,000.00	Technical Support	2,000.00
<div> <div>Submit For Approval</div> <div>Payee Details</div> <div>Back</div> </div>									

Figure 55: Payee Details - Submission for Approval

**Step17:** A message “**Record submitted successfully**” will appear on the screen.

Funds Transfer Bulk Uploading Details									
Record submitted successfully									
Uploaded Sanction Letter :									
<div> <div>1 of 1</div> <div>Find   Next</div> </div>									
Transfer Details									
Letter/Office Order No: juyjujh				Letter/Office Order Date: 31-08-2017					
Voucher Name : BT-2017-18-107				Scheme Name: NATIONAL HEALTH MISSION					
Actual Transaction Date: 31-08-2017				Project:					
Bank Account: 626201085449				Purpose of Transfer:					
Transfer Amount: 2,000.00				Remark: Payee Details Filled					
Status: Created									
Receiving Vendors:	Receiving Party Name	Payment Mode	Bank Name	Account Number	Deduction Amount	Net Amount	Transfer Amount	Component Details	
	Name							Name	Amount
	DIS HLTH&FAM WEL SOC A.KERALAM-ALLEPPEY	EPaymentUsingPrintAdvice	ICICI BANK LTD	060601000254	0.00	2,000.00	2,000.00	Technical Support	2,000.00

Figure 56: Payee Details - Successful Submission

The data approver can login and approve the funds transfer. The steps are as follows:

**Step1:** Go to **Transfers>Manage** (For Individual Transfers) or go to **Transfers>Manage Bulk Transfer** (For Bulk Transfers) to approve the entries submitted by the maker through bulk transfer mode.

**Step2:** The list of funds transfer submitted by the data operator for approval will be displayed. Click on the **Letter/Office Order No.** hyperlink.

Letter/office order no.	Letter/office order Date	Amount	Agency	Status
Commissioner/2014/001	05/03/2014	100000.00	DRDA Balaghat	Submitted

Figure 57: View Fund Transfer

**Step3:“Funds Transfer Details”** page will appear on the screen, verify the details and click on **Approve** button.

Scheme Component	Amount
Unskilled Workers	100000.00

Figure 58: Approve Fund Transfer

**Step4:** At the time of Approving/Rejecting/Cancelling the transaction, a pop-up window for Remark will appear. Enter **Remark** and click on **Confirm** button.

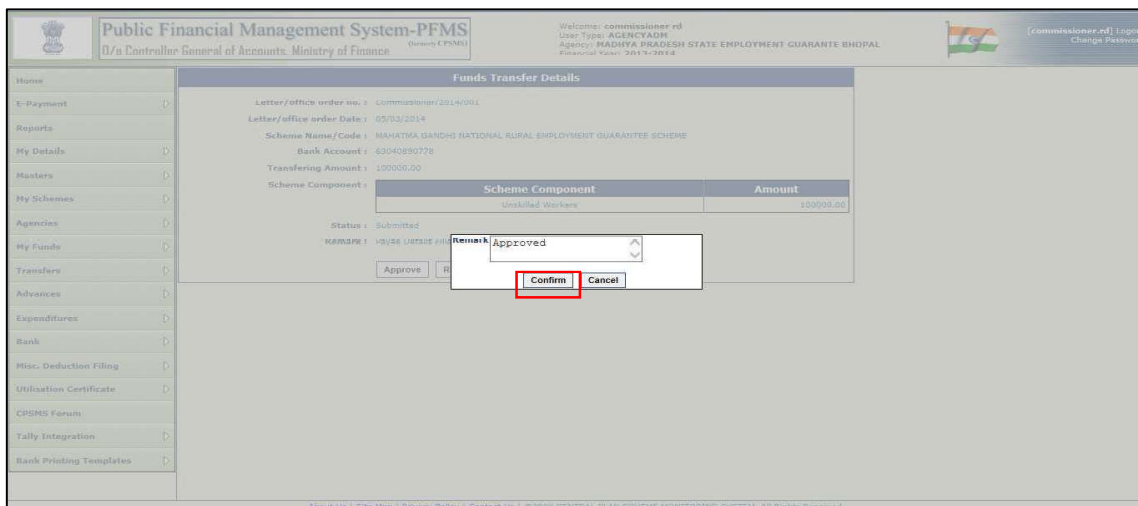


Figure 59: Updating Remark

**Step5:** A message “**Record approved successfully**” will appear on the screen.

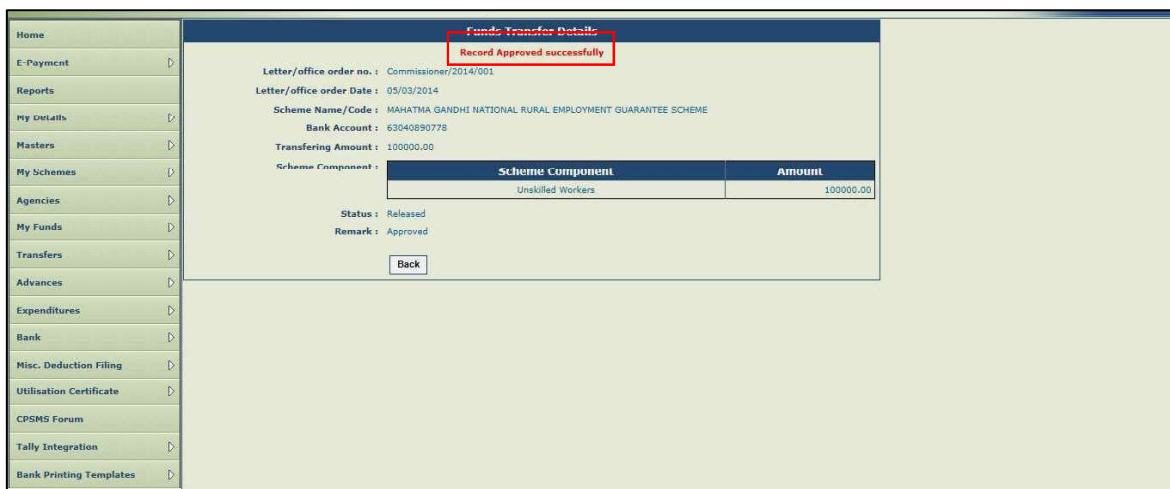


Figure 60: Successful Submission of Fund Transfer

## 2.5 Advance payment to vendors, beneficiaries and their settlement

Advance payment is made to a vendor or supplier for getting a service or product. Also, advance is given to an official for getting a work done.

Once the intended work is completed, the beneficiary/vendor/supplier submits the voucher and return the balance amount, if any, for settling the advance.

### 2.5.1 Payment of Advance

**Step1:** Go to “**Advances**” and click on “**Add New**”. The “**Create Fund Advances**” page will open.

**Step2:** Select ‘**Scheme**’ and ‘**Bank Account**’ from the drop down.

**Step3:** Select **Vendor/Beneficiary**, if already created (For creation of a new vendor - Refer Vendor User Manual)

**Step4:** Enter **Sanction Number**.

**Step5:** Select **Sanction Date**.

**Step6:** Select **Actual Transaction Date**.

**Step7:** Enter **Advance Amount**.

**Step8:** Enter **Purpose for Advance**.

**Step9:** Select scheme component by clicking on **Select Scheme Component** button.

**Step10:** Enter either **Amount** of Advance or **Percentage**. In case advance is to be paid from more than one component and percentage of each component is available, then details in any one of the column needs to be entered.

The screenshot shows the 'Create Funds Advances' form. The left sidebar contains navigation links: Home, F-Payment, Reports, My Details, Masters, My Schemes, Agencies, My Funds, Transfers, Advances, Expenditures, Bank, Misc. Deduction Filing, Utilisation Certificate, CPSMS Forum, Tally Integration, and Bank Printing Templates. The main form area is titled 'Funds Advance Header:'. It contains the following fields: Scheme (dropdown), Bank/Cash Account (dropdown), Vendor/Beneficiary (radio buttons), Sanction Number (text), Sanction Date (calendar), Actual Transaction Date (calendar), Balance Amount (text), Advance Amount (text), and Purpose for Advance (text). There is a 'Customization Name' section with a message 'No Records Found For Bulk Customization'. Below the main fields is the 'Scheme Component Details' section, which includes a table for adding components with columns for 'Scheme Component' and 'Amount'. The table has one row with the component '[ 4465 ] Work site facilities' and an amount of '10000.00'. There are buttons for 'Add', 'Save', 'Reset', and 'Cancel' at the bottom of the form.

Figure 61: Creation of Fund Advances

**Step11:** Click on **Add** button to display the advance details. The total amount and net of component amounts should match to proceed further.

**Step12:** Click on **Save** button.

The screenshot shows the 'Save Fund Advance Details' form. The left sidebar is the same as in Figure 61. The main form area displays the details of the advance created in Figure 61. The fields are: Sanction Number (1344an), Sanction Date (06/03/2014), Actual Transaction Date (06/03/2014), Balance Amount (20343448000.00), Advance Amount (10000), and Purpose for Advance (text). The 'Scheme Component Details' section shows a table with one row: '[ 4465 ] Work site facilities' with an amount of '10000.00'. There are buttons for 'Add', 'Remove', 'Save', 'Reset', and 'Cancel' at the bottom of the form.

Figure 62: Saving Fund Advance Details

**Step13:** A message “**Funds details saved successfully. Do you want to proceed with payee details**” will appear on the screen. Click ‘**Yes**’ to enter payee details.

The screenshot shows the PFMS interface with a sidebar on the left containing links like 'My Funds', 'Transfers', 'Advances', 'Expenditures', 'Bank', 'Misc. Deduction Filing', 'Utilisation Certificate', 'CPSMS Forum', 'Tally Integration', and 'Bank Printing Templates'. The main area displays 'Scheme Component Details' with fields for Sanction Number, Sanction Date, Actual Transaction Date, Balance Amount, and Advance Amount. Below these is a table for Scheme Components. At the bottom, a message states 'Funds details saved successfully. Do you want to proceed with payee details' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box.

Scheme Component	Amount
[ 4465 ] Work site facilities	10000.00

Total Amount: 10000.00  
Component Amount: 10000.00  
Balance Amount: 0.00

Funds details saved successfully.  
Do you want to proceed with payee details

**Yes** **No**

Figure 63: Process for Payment Details

**Step14:**For adding Deduction details like TDS from payment (if any), Select ‘**Yes**’ option under “**Do You want to Add Deduction Details?**”

**Step15:** Click on ‘**Next**’ button.

**Step16:** Select ‘**Deduction Type**’.

**Step17:** Enter Amount/Percentage to be deducted and click on ‘**Add Deduction**’.

There can be different types of deduction. The net amount plus deducted amount should match with the total amount of advance. Click on **Confirm** to complete payee details.

The screenshot shows the PFMS interface with a sidebar on the left containing links like 'CPSMS Forum', 'Tally Integration', and 'Bank Printing Templates'. The main area displays 'Vendor/Beneficiary Details' with a table for Vendor Name, Unique Code, and Amount. Below this is the 'Instrument Type' section with a dropdown for Instrument Type and an 'Add' button. The 'Cheque Details' section has a table for Cheque No., Cheque Favouring, Amount, Date, and Delete. Below this is a confirmation dialog 'Do you want to add the deduction details?' with 'Yes' and 'No' radio buttons. The 'Yes' button is highlighted with a red box. Below the dialog is a 'Next' button, also highlighted with a red box. The 'Favouring' section has a dropdown for Favouring, a dropdown for Deduction Type, and fields for Percentage and Amount. The 'Add Deduction' button is highlighted with a red box. Below this is a table for Favouring, Deduction Type, and Amount.

Vendor Name	Unique Code	Amount
M/s. Capital Services	M/2898eMP4	10000.00

Instrument Type: Cheque [Add]

Cheque No.	Cheque Favouring	Amount	Date	Delete
233365 (Account is Non CBS, So enter cheque here.)	M/s. Capital Services	9600	06/03/2014	X

Do you want to add the deduction details?  
☒ Yes ☐ No

**Next**

Favouring: M/s. Capital Services\_233365\_Cheque Deduction Type: TDS Percentage: Amount:

**Add Deduction**

Favouring	Deduction Type	Amount
M/s. Capital Services_233365_Cheque	TDS	500.00

Figure 64: Adding Deduction Type

**Step18:** Verify the details and click on **Submit for Approval** button.

Modified By: commissioner.rd Modified On: 06/03/2014

Purpose for Advance:

Payment Details:

Favouring	Cheque/Account No.	Amount	IFSC/MICR Code.	Payment Mode	Instrument Date
M/s. Capital Services	233365	9500.00		Cheque	06/03/2014

Bill Deduction Details:

Favouring	Deduction Type	Amount
M/s. Capital Services_233365_Cheque	TDS	500.00

Scheme Component Details:

Component Name	Amount
[ 4465 ] Work site facilities	10000.00

Vendor/Beneficiary Details:

Vendor Name	Unique Code	Amount
M/s. Capital Services	M/289e8eMP4	10000.00

Payee Details has been submitted successfully

Payee Details Submit For Approval Back

Figure 65: Advance Fund – Submitting for Approval

**Step19:** A message “**Payee Details has been submitted successfully**” will appear on the screen.

**Step20:** The approver will login and go to **Advances>Approve**.

Most Visited Getting Started

My Funds

Transfers

Advances

Expenditures

Bank

Misc. Deduction Filing

Utilisation Certificate

CPSMS Forum

Tally Integration

Bank Printing Templates

Modified By: commissioner.rd Modified On: 06/03/2014

Purpose for Advance:

Add new

Manage

Approve

Adv Approve Fund Advances

Voucher Printing Advance

Cheque/Account No.	Amount	IFSC/MICR Code.	Payment Mode	Instrument Date
233365	9500.00		Cheque	06/03/2014

Favouring

Deduction Type

Amount

M/s. Capital Services\_233365\_Cheque

TDS

500.00

Scheme Component Details:

Component Name	Amount
[ 4465 ] Work site facilities	10000.00

Vendor/Beneficiary Details:

Vendor Name	Unique Code	Amount
M/s. Capital Services	M/289e8eMP4	10000.00

Approve/Reject Cancel Transaction Back

Figure 66: Approval for Fund Transfer

**Step21:** Approver can view the details submitted by the maker by clicking on the **Sanction Number**.

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Manage Funds Advance								
Financial Year :	2017-2018							
Scheme Code/Name :	Select							
Project :	Select							
Vendor :	--All--							
Sanction Number :	<input type="text"/>							
Status :	Submitted							
Amount From :	<input type="text"/>							
Amount To :	<input type="text"/>							
<input type="button" value="Search"/> <input type="button" value="Reset"/>								
Sanction Number	Sanction Date	Scheme Code-Name	Project Name	Vendor/Beneficiary Name	Advance Amount	Settled Amount	Balance Amount	Status
10u8lu	26/07/2017	9156-NATIONAL HEALTH MISSION		Muraleedharan, G	500.00	0.00	500.00	Submitted
1ufwjl	23/05/2017	9150-NATIONAL HEALTH MISSION		R.Valsala Kumari	580000.00	0.00	580000.00	Submitted
NL/NHM/123	15/08/2017	9156-NATIONAL HEALTH MISSION		Lilly, M	5000.00	0.00	5000.00	Submitted
sandesh/123	01/08/2017	9156-NATIONAL HEALTH MISSION		Lilly, M	10000.00	0.00	10000.00	Submitted
<input type="button" value="Add New Funds Advance"/>								

Figure 67: Sanction Number Details

**Step22:** Verify the details and click on **Approve/Reject** button.

Funds Advance Details						
Sanction Number :	10u8lu		Sanction Date :	26/07/2017		
Voucher Number :	BP-2017-18-295					
Account Number :	626201088294		Agency Name In Bank :	STATE HEALTH & FAMILY WELFARE SOCIETY AYUSH		
Plan Scheme :	9156-NATIONAL HEALTH MISSION		Project :			
Status :	Submitted		Bank name :	ICICI BANK LTD		
Amount :	500.00		Remarks :			
Created By :	SHFWSKERALA		Created On :	26/07/2017		
Modified By :	SHFWSKERALA		Modified On :	26/07/2017		
Purpose for Advance :			Uploaded Sanction Letter :			
Payment Details:						
Favouring	Cheque/Account No.	Amount	IFSC/MICR Code	Payment Mode	Instrument Date	Narration For Pass Book
MURALEEDHARANG	uly7y876y78	500.00		DD	26/07/2017	
Scheme Component Details:						
Component Name					Amount	
[ 8.1.1.3.6.12 ] Salary					200.00	
[ 01 ] Computer Assist					300.00	
Vendor/Beneficiary Details:						
Account No.	Vendor Name	Unique Code	Amount			
57044105614 - MURALEEDHARANG	Muraleedharan, G	Mu379fabICI	500.00			
<input type="button" value="Approve/Reject"/> <input type="button" value="Back"/>						

Figure 68: Approval/Rejection Fund Advance

**Step23:** At the time of Approving/Rejecting/Cancelling the transaction, a pop-up window for Remark will appear. Enter **Remarks** and click on **Approve/Reject** button.

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Plan Scheme: 9156-NATIONAL HEALTH MISSION  
Status: SUBMITTED  
Amount: 500.00  
Created By: SHFWSKERALA  
Modified By: SHFWSKERALA  
Purpose for Advance:

Project: JIJU BAWA LTU  
Remarks:  
Created On: 26/07/2017  
Modified On: 26/07/2017  
Uploaded Sanction Letter:

Payment Details:

Favoursing	Cheque/Account No.	Amount	IFSC/MICR Code.	Payment Mode	Instrument Date	NarrationForPassBook
MURALEEDHARANG	uly7y87y78	500.00		DD	26/07/2017	

Scheme Component Details:

Component Name	Amount
[ 01.1.3.6.12 ] Salary	200.00
[ 01 ] Computer Assist	300.00

Vendor/Beneficiary Details:

Account	Unique Code	Amount
57044105614 - MURALEEDHARANG	Mu379fabICI	500.00

Approve/Reject Back

Figure 69: Approval/Rejection with Remark

**Step24:** A message “**Funds advance has been approved successfully**” will be displayed.

**Funds Advance Details**

Sanction Number: 100810  
Sanction Date: 26/07/2017  
Voucher Number: BP-2017-18-295  
Account Number: 626201088294  
Agency Name In Bank: STATE HEALTH & FAMILY WELFARE SOCIETY AYUSH  
Plan Scheme: 9156-NATIONAL HEALTH MISSION  
Project:  
Status: Submitted  
Bank name: ICICI BANK LTD  
Amount: 500.00  
Remarks:  
Created By: SHFWSKERALA  
Created On: 26/07/2017  
Modified By: SHFWSKERALA  
Modified On: 26/07/2017  
Purpose for Advance:  
Uploaded Sanction Letter:

Payment Details:

Favoursing	Cheque/Account No.	Amount	IFSC/MICR Code.	Payment Mode	Instrument Date	NarrationForPassBook
MURALEEDHARANG	uly7y87y78	500.00		DD	26/07/2017	

Scheme Component Details:

Component Name	Amount
[ 01.1.3.6.12 ] Salary	200.00
[ 01 ] Computer Assist	300.00

Vendor/Beneficiary Details:

Account No.	Vendor Name	Unique Code	Amount
67011105611 MURALEEDHARANG	Muraleedharan. G	Mu379fabICI	500.00

Funds Advance has been Approved successfully.

Create Reversal Back

Figure 70: Fund Advance Approval/Rejection confirmation

### 2.5.2 Advance Settlement

Advance paid should be settled within the stipulated time. The steps for settlement of advance are as follows:

**Step1:** Data operator will login and go to **Advances>Advance Settlements**.

**Step2:** Click on **Sanction Number** to verify advance details.

Figure 71: Advance Settlement

**Step3:** The **Advance Settlement** page will be displayed, Click on ‘**Add New Settlement**’ button to proceed to enter advance settlement.

Figure 72: New Settlement

**Step4:** Advance can be settled either by expenditure voucher or by returning the advance amount or partially by expenditure voucher and partially by refund of advance.

**Step5:** Select **Settlement Type**.

**Step6:** Select **Bank Account**

**Step7:** Select **Scheme component**

**Step8:** Select **Expense Type** (Revenue or Capital)

**Step9:** Enter **Amount** of settlement

**Step10:** Enter **Remarks** (if any) and click on **Add** button.

**Add New Settlement**

Settlement Type:

Bank Account:

Voucher/Challan Number:

Voucher Date:

Component Name:  Select Scheme component (Enter minimum 3 characters to Scheme Components)

Expense Type: ☒ Revenue ☐ Capital

Amount:

Remarks:

Scheme Component	Amount
[ 4465 ] Work site facilities	10000.00

Advance Paid To Vendor: 10000.00  
Settlement Created: 0.00  
Allready Settled Amount: 0.00  
Currently Settle Amount: 0.00  
Balance Amount: 10000.00

☒ Add

Figure 73: Advance Settlement Details

**Step11:** The advance settlement details will be displayed. Verify the details and select check box.

**Step12:** Click on **Save** button.

**Add New Settlement**

Settlement Type:

Bank Account:

Voucher/Challan Number:

Voucher Date:

Component Name:  Select Scheme component (Enter minimum 3 characters to Scheme Components)

Expense Type: ☒ Revenue ☐ Capital

Amount:

Remarks:

Scheme Component	Amount
[ 4465 ] Work site facilities	10000.00

Advance Paid To Vendor: 10000.00  
Settlement Created: 0.00  
Allready Settled Amount: 0.00  
Currently Settle Amount: 5000.00  
Balance Amount: 5000.00

☒ Add

Voucher Number	Scheme Component	Settlement Type	Amount	Expense Type
<input checked="" type="checkbox"/> MP402-03-2014-0001	[ 4463 ] Administrative expenses	Expenditure	5000.00	Revenue

Figure 74: Saving Advance Settlement Details

**Step13:** Then, go to **Advances>Advance Settlement** and click on **Sanction Number** for submitting the settlement amount entered for approval.

Figure 75: Verify Advance Settlement Details

**Step14:** Verify the details and select check box and Click on **Submit for Approval** button.

Figure 76: Advance Settlement Details Submitted for Approval

**Step15:** A message “**Settlement Submitted Successfully**” will be displayed.

**Step16:** The approver will login and go to **Advances>Advance Settlement** and click on **Sanction Number**.

The screenshot shows the 'Manage Funds Advance' interface. On the left is a sidebar menu with options like Home, E-Payment, Reports, My Details, Masters, My Schemes, Agencies, My Funds, Transfers, **Advances**, Expenditures, Bank, Misc. Deduction Filing, Utilisation Certificate, and CPSMS Forum. The main area has a form with fields for Financial Year (2013-2014), Scheme Code/Name, Vendor/Beneficiary Name, Sanction Number, and Status. Below the form is a table with the following data:

Sanction Number	Sanction Date	Scheme Code-Name	Vendor/Beneficiary Name	Advance Amount	Status
	06/03/2014	0822-MAHATMA GANDHI NATIONAL RURAL EMPLOYMENT GUARANTEE SCHEME	M/s. Capital Services	10000.00	Approved

Below the table are buttons for 'Add new', 'Manage', 'Approve', 'Advance Settlements', and 'Voucher Printing Advance'.

Figure 77: Advance Settlement Details Submitted Successfully

**Step17:** Select the check box and click on **Approve/Reject** button.

The screenshot shows the 'Advance Settlement' interface. It displays details for a settlement, including Scheme Code/Name, Bank Account Number, Vendor/Beneficiary Name, Order Number, Order Date, Advance Status, Total Advance Amount, Advance Paid To Vendor, Total Paid Amount, Total Deduction Amount, and Already Settled Amount. Below this is a table with the following data:

<input type="checkbox"/>	Voucher Number	Component Name	Settlement Type	Amount	Status
<input checked="" type="checkbox"/>	MP402-03-2014-0001	Administrative expenses	Expenditure	5000.00	Submitted
Grand Total				5000.00	

At the bottom are buttons for 'Add New Settlement', 'Submit For Approval', 'Cancel Settlement', **Approve/Reject** (highlighted with a red box), and 'Back'.

Figure 78: Approval/Rejection of Advance Settlement Details

**Step18:** A message '**Settlement Details Approved Successfully**' will appear on the screen.

This completes the process of advance settlement. Advances once settled will form part of expenditure. The current status of advance can be viewed by going to Advances>Manage menu.

## 2.6 Expenditure

Expenditure module is used for capturing all expenses incurred directly by the PIAs like salary expenses, office expenses etc. The steps for entering these expenditures are set below:

**Step1:** Go to **Expenditure>Add New**.

- Step2:** Select **Scheme** from the drop down list.
- Step3:** Select **Account number** to be debited.
- Step4:** Select payee as self or Vendor/Beneficiary.
- Step5:** In case of Vendor/Beneficiary, select **Vendor** from drop down list.
- Step6:** Enter **Sanction No.**
- Step7:** Enter **Sanction Date**
- Step8:** Enter **Actual Transaction Date**.
- Step9:** Enter the gross amount to be paid in the total amount paid column.
- Step10:** Select **Scheme component**
- Step11:** Select expense type.
- Step12:** Enter **Amount** or **Percentage**
- Step13:** Click on **Add** button. The gross amount and component/s amount should tally to proceed further.

Scheme Component	Amount	Expense Type
[ 4492 ] Cost of materials	2500.00	Revenue

Figure 79: Creation of Expenditure Details

**Note:** Vendor/Beneficiary list can be created by clicking on '**Add New Vendor/Beneficiary**' hyperlink of expenditure page or go to **Masters>Vendors>Add New**. If self-option is selected, the field for selection of vendor will be disabled. Click on **Save** button.

**Add new vendor/beneficiary**

Sanction No.: 231-san  
 Sanction Date: 06/03/2014  
 Actual Transaction Date: 06/03/2014  
 Total Available Amount: 20343438000.00  
 Total Amount: 2500

Purpose for Expenditure:

**Scheme Component Details:**

Scheme Components: [ Select Scheme ] Expense Type: [ Revenue ] [ Capital ] Percentage: Amount: [ Add ]

Scheme Component	Amount	Expense Type
[ 4492 ] Cost of materials	2500.00	Revenue

Total Amount: 2500.00  
 Component Amount: 2500.00  
 Balance Amount: 0.00

**Save** **Reset** **Back**

Figure 80: Adding New Vendor/Beneficiary Details

**Step15:** Upon saving the entry, the user will be prompted for entering the payee details. **Click ‘Yes’** to proceed for entering payee details as explained in **“Transfer”** and **“Advance”** section.

Once the expenditure transaction is submitted by the operator, the approver will login, go to Expenditure-Approve and after verifying the details, approve the expenditure to complete the process.

#### **Payment of Deduction made from Advance/Expenditure Bills**

Payment of deductions made from Advance/Expenditure bill can be made from the Menu Misc. Deduction filing. The detailed steps are set below:

**Step1:** Go to **Misc. Deduction Filing>Manage Deductions**. The page will show sanction details along with deduction details.

**Step2:** Select **Scheme** and **Deduction Type** and search to see list of sanctions where deductions have been effected.

**Step3:** Select the sanction/s and click on **Add deductions**.

Figure 81: Manage Deduction

**Step4:** The Tax Deduction Payment Details page will open. Select **Scheme**, **Account Number** and **Instrument Number** from the drop down list. Deducted amount will be shown by default. Enter the instrument details and payee detail and click on **Save** button to complete payment of deducted amount.

Figure 82: Tax Deduction Payment Details

## 2.7 Making Inter Bank Transfers

This menu is used for transferring amount in the system from one bank account to another or to cash and between schemes, if the PIA operates more than one scheme within the same PIA. The steps are as follows:

**Step1:** Go to **Bank>Interbank Transfer** to open the Interbank Transfer page.

**Step2:** Select scheme name from which the amount is to be transferred and the Scheme to which it is to be transferred.

**Step3:** In case fund is to be transferred between two different accounts of the same scheme, select the same scheme on both sides.

**Step4:** Select 'From' and 'To' account/cash, Transferring Amount, Instrument No. and Transfer date and Actual Transaction Date.

**Step5:** Select **Payment Mode** from the drop down list.

**Step6:** Click on **Transfer** button.

The screenshot shows the 'Funds Transfer Self' interface in the PFMS. The left sidebar contains a menu with options like BharatKosh Report, Home, Dashboard, HM Reports, Users Master, E-Payment, Health Module, Reports, Implementing Agency, Agency Master Data, Agency Schemes, Other Agencies, Multiple DBT DSC Signatory, and Funds. The main area is divided into 'From Account Details' and 'To Account Details' sections. The 'From Account Details' section includes fields for From Scheme (9156 - NATIONAL HEALTH MISSION), From Project (Select), From Account (626201088429 - STATE HEALTH & FAMILY W), Available Balance (10874.00), Transferring Amount (1000), Transfer Date (08/03/2014), and Actual Transaction Date (02/04/2014). The 'To Account Details' section includes fields for To Scheme (9156 - NATIONAL HEALTH MISSION), To Project (Select), To Account (Cash), Available Balance (28201.00), Voucher Number, Narration, and NarrationForPassBook. A 'Payment Details' pop-up window is open, showing Payment Mode (Select), Party Name (STATE HEALTH & FAMILY WELFARE S), and Cheque Number (256648). The 'Transfer' button is highlighted with a red box.

Figure 83: Interbank Transfer

**Step7:** A pop up window will appear on the screen **“Are you sure you want to transfer”**. Click on **‘OK’** to proceed.

The screenshot shows the same 'Funds Transfer Self' interface as Figure 83, but with a confirmation pop-up window titled 'Are you sure, you want to transfer?' displayed over the form. The pop-up window has 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box. The background form shows the same details as Figure 83, but the 'Payment Mode' is now set to 'Cheque' and the 'Party Name' is 'STATE HEALTH & FAMILY WELFARE S'.

Figure 84: Interbank Transfer – Fund Transfer

**Step8:** The message **“The Transaction has been saved successfully with Voucher Number: TFR-XXXX-XX-XX”**. Click on **‘OK’** button.

The screenshot displays the 'Funds Transfer Self' interface. A modal message box is centered on the screen, stating: 'The Transaction has been saved successfully with Voucher Number: TFR-2017-18-45'. Below the message is an 'OK' button. The background interface shows the 'Fund Transferred Successfully' status at the top. The form includes sections for 'From Account Details' and 'To Account Details', each with dropdowns for Scheme, Project, and Account, and fields for Available Balance, Transferring Amount, Transfer Date, and Actual Transaction Date. There are also fields for Voucher Number and Narration, and buttons for 'Transfer' and 'Reset'.

Figure 85: Interbank Transfer – Fund Transfer

**Step9:** The message “**Funds Transferred Successfully**” will be displayed on the screen.

This screenshot shows the same 'Funds Transfer Self' interface as Figure 85, but with the 'Fund Transferred Successfully' message at the top highlighted by a red rectangular box. The rest of the form, including the account details, transfer amount, date, and buttons, remains visible in the background.

Figure 86: Interbank Transfer – Fund Transfer

**Note:** The transferred amount will be deducted from the 'From Account' and will get added to the Account/Cash selected for transferring the amount.



**GeM**  
Government  
e Marketplace

Procurement Reimagined

Efficient • Transparent • Inclusive

# GOVERNMENT E MARKETPLACE

**GeM Handbook**

July 2018





31<sup>st</sup> July, 2018

## FOREWORD

As part of the Budget 2016–2017, we had announced the establishment of a technology driven platform to facilitate the procurement of goods and services by various Ministries and agencies of the Government. Government e-Marketplace (GeM), which was launched under the Ministry of Commerce on 9 August 2016 is meant to be a centralized, unified procurement platform that would increase coverage, access and efficiency of public procurement in our country. GeM has come a long way since its initiation, and with continued momentum, it shall create an unprecedented change in public procurement.

GeM allows for optimization of public expenditure besides providing a ease of transactions by bringing the buyers and sellers on a common e-platform. In order to support GeM in reaching its objective, the Ministry of Finance added Rule 149 in the General Financial Rules, 2017 mandating purchases through GeM by Government users. The GFR rule also stipulates the fundamental guidelines by which GeM shall operate. There is now a need for all buying entities to understand that by virtue of GeM being a technology driven platform, there shall be a fundamental shift required in the current procurement processes and policies.

This document has been developed to provide a comprehensive understanding of GeM and summarizes the overall design and plan for the GeM initiative. It is meant to define the scope of operations for GeM and clearly define the expectations that GeM holds from its users and stakeholders and vice versa.

The fundamental objective of GeM is to create savings for the Government. GeM is expected to significantly reduce both the transaction and administrative costs in public procurement. Given the size and scale of public procurement in our country, GeM would lead to significant savings of precious public resources.

I am certain this handbook would be immense use to all the stakeholders and contribute to promoting this new cashless, contactless and paperless mode of procurement.

  
(Arun Jaitley)



## FOREWORD

E-Governance has been one of the biggest agenda items in our country. Over the years, various Central Ministries and State Governments have undertaken a large number of initiatives towards this end. The Government e-Marketplace (GeM) is one such key mega-scale initiative that, in the long run, shall make a significant impact on efficient spending and the productivity of our country.

The GeM aspires to revolutionize the public procurement landscape in the country by building a truly open and transparent platform, which will be available and accessible by a much larger base of buyers, sellers and service providers. Built on modern e-commerce technologies, and coupled with verifiable means of authenticity of suppliers and purchasers, GeM allows for an end-to-end reliable procurement transaction to be done completely online i.e. cashless, contactless and paperless.

An initiative of this scale for a burgeoning digital economy, such as India, has the potential to create far-reaching impact beyond online procurement.

- GeM's easy to use platform shall make it possible for all sellers to do business with the Government. The platform will be inclusive and will encourage and support MSMEs and Startups in becoming competitive.
- GeM's robust audit trail shall bring about increased accountability amongst buyers. Increased accountability will allow us to do away with the current long and cumbersome procedures.

GeM shall soon possess a wealth of procurement data that so far resided in silos. This data shall have multiple implications allowing the Government to make data-driven decisions and use analytics to drive policy-making.

The GeM will soon become a cornerstone of nation building and has already shown significant impact in the short time since its initiation. A concerted effort is required from all Government buyers, sellers and the various partners in the GeM ecosystem to make it a success and to allow it to unlock its full potential.

The GeM Handbook is meant to act as the principle guiding force base for designing its processes and policies.

  
(Suresh Prabhu)

Rita Teatota, IAS



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**COMMERCE SECRETARY  
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## P R E F A C E

India currently spends more than Rs. 25 lakh crore on public procurement. The Government e-Marketplace (GeM) is an initiative of the Government of India to effect an evolution in public procurement. The GeM platform aspires to leverage the quantum growth in digital capability in India to reduce manual process inefficiencies and human interventions in public procurement and drive three key objectives: openness, efficiency and transparency in Indian public procurement.

A complete online solution implies reduced human intervention and full visibility of the process and procurement data. This would result in a system that is transparent and open, and makes the procurement process significantly faster.

The Government e-Marketplace (GeM) was launched on 9<sup>th</sup> August 2016 and is managed by GeM Special Purpose Vehicle, a Government owned, Section 8 Company under the Department of Commerce. In its endeavor to continuously evolve towards becoming a world-class, robust and a state-of-the-art portal, GeM launched a scaled up version: GeM 3.0 on 26<sup>th</sup> January 2018 addressing multiple technical issues and rolling out new, advanced features.

While it is important to note that GeM is still in the nascent phases of its journey and that there is immense potential going forward, GeM has achieved significant success so far. GeM has 20,000 + government organizations registered as buyers and has already built a seller base of more than 1,20,000 sellers who come from across all states of India. In addition, GeM has collaborated with the Ministry of Micro, Small and Medium Enterprises to accelerate and advance the presence of MSMEs on the platform. GeM has collaborated with multiple key entities such as UIDAI and MCA 21 for seamless flow of data for authentication to simplify the processes of registration, procurement transaction, contracting and payments. GeM has received significant national and international acclaim and was awarded the South Asia Procurement Innovation Award of the World Bank in 2016.

The purpose of this document is to establish a robust structure and basic set of rules that will guide the different aspects of the GeM initiative across strategy and operations. It will act as the principal guiding force for the design of processes and policies for GeM.



[ Rita Teatota ]

New Delhi  
11 July 2018

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# 1. Introduction

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The Government e Marketplace (GeM) platform was launched on 9th August, 2016 as an online, end-to-end solution for procurement of commonly used goods and services for all Central Government and State Government Ministries, Departments, Public Sector Units (PSUs) and affiliated bodies. **The purpose of this document is to establish a robust structure and basic set of rules that will guide the different facets of the GeM initiative across strategy and operations.** This document is in furtherance to the following Government directives issued in relation to GeM.

1. Rule 141-A of GFR 2005, superseded by Rule 149 of GFR 2017.

2. Office Memorandum on GeM payment and timelines dated 20th September, 2016.

3. Office Memorandum on the entry in the Government of India (Allocation of Business) Rules, 1961 dated 9th December, 2016.

4. Cabinet Note dated 7th April, 2017.

5. Cabinet Secretariat Notification dated 8th December, 2017.

This document shall therefore act as the principle guiding force basis which GeM shall design its processes and policies. While this document shall be revised as the platform and organization matures, there are certain key elements of GeM that are immutable and form its foundation. **The GeM Charter captures these elements as a set of commitments that GeM shall undertake and uphold going forward.**

## 1.1 GeM Charter

---

1. GeM shall provide a complete end-to-end contactless, cashless and paperless procurement system:

GeM shall cover the entire procurement process right from vendor registration to order fulfillment and payment.

2. GeM shall constantly endeavor to enhance transparency and efficiency in the procurement process:

GeM shall bring about standardization in the procurement process and ensure adherence to timely delivery and payment.

3. GeM shall be a trust based system with minimal manual intervention:

GeM shall leverage technology and the existing database with domain Ministries to ensure ease and convenience in the processes of registration, procurement transaction and contracting.

4. GeM shall provide decision support to help users achieve optimal value-for-money:

GeM platform shall provide additional features such as buyer and seller rating, tools to establish price reasonability and demand forecasting to help its users make more informed decisions.

5. GeM shall provide a robust audit trail along with an internal system of check and controls:

GeM platform shall employ a system of inbuilt checks and controls and maintain an audit trail (for a period specified on the GeM platform) that shall make it possible to trace back the activity of any user if the need arises.

6. GeM shall be an inclusive platform and support the objectives of the various preferential market access policies:

GeM shall, to the extent possible, encourage and enable local businesses, Micro and Small Enterprises (MSEs) and startups to conduct business with the Government.

## 1.2 GeM Special Purpose Vehicle

---

7. GeM shall in line with its principles of transparency and openness publish a monthly scoreboard on the platform:  
GeM shall keep all its stakeholders informed regarding the development and growth of the GeM platform by way of a monthly scoreboard<sup>1</sup> that shall cover the following key elements -

- GMV (Monthly)
- Number of buyers and sellers
- Number of product and service categories
- % orders with delivery and payment within time and ageing
- % savings achieved
- Number of unfulfilled or cancelled orders
- Number of disputes/incidents registered and resolved with ageing

GeM shall send this overall report along with the progress shown at the level of each Ministry and State to the Cabinet Secretary and the Commerce Secretary. GeM shall also send quarterly progress reports of these parameters at a Ministry/State/UT level to each of the respective Secretaries and Chief Secretaries/Administrators.

8. GeM shall actively drive collaboration with key stakeholders including Ministries and States: GeM shall interface with the Standing Committees (for each Ministry and State) on various issues including annual procurement plan, defining technical specifications and reviewing the procurement process.

Public procurement amounts to 15-20% of a nation's GDP<sup>2</sup> and therefore an efficiently run public procurement process is critical to our nation's economy. A well-functioning and efficient public procurement system helps the development process by improving the strategic and efficient allocation and utilization of government expenditure i.e. public procurement.

For a geographically large and politically diverse nation such as India, standardizing public procurement is a challenging task. The prevailing public procurement regime in India is characterized by fragmented processes and policies that operate in silos and require high levels of manual intervention.

The genesis of the **Government e Marketplace (GeM)** initiative is thus driven by the need to deliver a step change in the public procurement process in the country and usher in an era of e-governance by leveraging the power of digital.

The following entry has been made in the Government of India (Allocation of Business) Rules, 1961, vide notification dated 8 th December 2017 - "32. Development, operation and maintenance of National Public Procurement Portal—Government e Marketplace".

The **Government e Marketplace Special Purpose Vehicle (GeM SPV)**, a Section 8 (Non-Profit) Private Limited Company under the Ministry of Commerce has been incorporated under the Companies Act, 2013 to develop, manage and maintain the GeM platform.

<sup>1</sup> Indicative template is provided in the appendix A

<sup>2</sup> World Bank Country Procurement Assessment Report

## 1.3 Founding Principles of the GeM Initiative

### › 1.3.1 Summary of the Cabinet Note

The foundation for the GeM initiative has been laid down through the Cabinet Note on “Setting up of a Special Purpose Vehicle to be called Government e Marketplace (GeM SPV)” dated 7th April, 2017. This note defines the purpose with which GeM has been envisioned. This stated purpose shall play a key role in defining the strategy and operating model for GeM

*Key elements from the note are as follows:*

#### ***Reason behind the GeM initiative***

- Need for reform to bring consistency in public procurement
- Existing malpractices in the system due to buyer-supplier interaction

#### ***Founding principles of GeM SPV (Special Purpose Vehicle to develop, manage and maintain the GeM platform)***

- Incorporated as a Section 8 Company. Decision on public listing of GeM SPV to be taken subsequently.
- Autonomous organization which is agile and has flexibility to take market driven decisions
- The organization shall break-even and self-sustain its operations from 3rd year onwards.
- The sources of monetization (charges to buyers and sellers) shall be kept to minimum, enough to sustain running of SPV and pay Managed Service Provider (MSP)
- Fully accountable to tax payers and the Government
- Promote inclusiveness and ease of doing business with the Government and its agencies

#### ***Impact that GeM is expected to deliver***

- Increase access for procurement - broader outreach, wider variety of goods and services
- Increase transparency and efficiency (time & cost) of procurement
- Encourage small business units/individuals to do business with the Government
- Make procurement data easily available for auditors, administrators, vigilance etc.

It is important to note that as the GeM platform and organization evolve, the founding principles will also have to evolve. Thus, the principles of GeM and the organization shall be periodically reviewed and appropriate modifications shall be undertaken in consultation with key stakeholders and with the consent of the Government.

### › 1.3.2 Role and Nature of the GeM Initiative

In the constantly evolving procurement process in the country, it is useful to reiterate the role of GeM. GeM shall use modern technology and enablers to bring together all government buyers on a unified online platform for the procurement of commonly used goods and services. It shall reduce manual process inefficiencies in procurement and provide a paperless and cashless e-marketplace with a streamlined, consistent process for all users. All buying and selling stakeholders on GeM shall have to adapt to this standardized process and necessary re-engineering to this effect will be needed at their end.

GeM is characterized by three core elements:

<b><i>Openness</i></b>	<b><i>Fairness</i></b>	<b><i>Inclusiveness</i></b>
GeM shall be an open marketplace wherein it promotes access to information and transparency. Relevant information on sellers, goods, and services shall be easy to find and readily available for users. GeM shall provide data-based insights to help users in decision-making and ascertaining price reasonability.	One of the platform's key objectives is to allow sellers, big and small, to gain direct access to Government buyers. In doing so, all sellers shall be treated fairly and GeM shall not offer promotional treatment to one seller over the other. GeM shall support the intentions behind the preferential market access policies and ensure that all sellers are provided with a level playing field. This will ensure the health and competitiveness of the marketplace.	GeM shall promote inclusiveness, which means that all Government buyers and sellers shall be accepted on the platform. GeM shall aspire to create a robust seller base and all sellers interested in conducting business with the Government shall be welcomed on the platform. For buyers and sellers that do not have the know-how of using GeM, additional assistance in the form of focused training, onboarding sessions and continued feedback and support shall be provided.

## **1.4 Objective of this Document**

This document serves to provide a comprehensive understanding of the guiding principles by which GeM shall operate and has been structured along three key chapters:

### **1. GeM Platform**

This section shall define the scope of operations and potential for the GeM platform. It also lays down the underlying principles by which the different features of the platform shall be designed and the key obligations that the GeM platform holds towards its users.

### **2. GeM Organization (GeM SPV)**

This section details out the strategic and operational roadmap of the GeM Organization (GeM SPV) that is required to deliver the GeM platform. It also provides a brief on the governance structure that will be instituted for the GeM SPV.

### **3. GeM Stakeholder Ecosystem**

This section introduces the different stakeholders within the GeM ecosystem and calls out their role and responsibility. It also lays down the guiding principles of collaboration for GeM.

## 2. GeM Platform

### 2.1 Scope of Operations for the GeM Platform

There are three facets to defining the scope of operations for the GeM platform:

**Who** are the customers (both buyers and sellers) that GeM platform will cater to

**What** will be the goods and services offered on the GeM platform

**How** shall the GeM platform operate to execute the aforementioned 'Who' and 'What'

services offering in a staged manner. GeM shall prioritize those goods and services to be supported in the short term that have a low level of customization, are more standardized and have larger transaction volumes in the public procurement domain. As the GeM platform matures, it shall support goods and services requiring higher degree of complexity.

At the same time, the GeM platform shall clearly define the set of goods and services that the platform shall never cater to constituting the exclusion list. This shall include goods that are highly specialized and limited to very niche buyer segment, such as defence equipment, and services like mining services.

#### Who

GeM has been conceptualized with the aim of reforming public procurement in the country. The GFR 2017 mandates all Ministries or Departments to procure Goods and Services available on GeM from GeM. GeM aims to replicate the offline market on its online platform to create an open market that bring together sellers across the board ranging from established brands to MSEs, individual suppliers, suppliers of innovative products and services and artisans. GeM shall permit any seller, registered in India in accordance with prevalent laws and regulations, manufacturing or marketing genuine goods/ services to sell on GeM.

#### What

GeM has been conceived as a platform for the sale and purchase of commonly used goods and services. The spectrum of goods and services procured by the Government is very wide. The goods procured by the Government range from highly standardized goods like A4 printing paper, printing cartridges and electronic goods like printers and laptops to highly specialized goods like drilling equipment and medical equipment. Similarly, for services, the spectrum ranges from standard services such as security services, chauffeur services and gardening services to a more complex set of specialized services such as consulting services and engineering services.

While GeM shall seek to cater to all the buyer needs for goods and services that are commonly used, it shall build its goods and

#### How

The GeM platform shall be an open marketplace and shall focus solely on being a platform for Government buyers to meet sellers and conduct business. It shall neither own the goods and services sold through the platform nor own the supply and logistics of goods and services transacted on it. The GeM platform shall be a trust-based portal where the buyer shall hold the responsibility to ensure value for money and timely payment in any purchase made and the seller shall hold the responsibility to ensure the accuracy and integrity of all information shared, the quality of products and services sold and the timeliness of the delivery.

## 2.2 Potential for the GeM Platform<sup>3</sup>

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The value of **annual spend on public procurement** in India is estimated at anywhere between 18 – 20% of India's GDP. This spend constitutes the entire universe of goods and services procured. Approximately 20% of total goods (~2 L Cr) and 7.5% of total services (~1.5 L Cr) can be classified as goods and services addressable in the short term for the GeM platform. The ability to capture the largest possible part of this addressable spend and drive it through the platform shall depend on three key factors:

- The proportion of buyers out of the total universe of buyers comprising public procurement in India that are successfully on-boarded onto the GeM platform
- The availability of requisite goods and services, as needed by these buyers, on the platform
- The portion of the buyers' spend that the platform is able to capture

Given the GeM platform's starting point, it is envisaged that over a **2 -3 year period, close to 1 L Cr of annual transaction value can be targeted on the platform**. Since the procurement landscape in India is considerably diverse in terms of geographic and policy-related considerations, higher penetration shall be targeted for buyers covered under Central Government (such as Central Ministries, Departments, Central Public Sector Enterprises, and Public Sector Undertakings) which account for ~65% of total addressable spend.

Over a 5 – 6 year period, the GeM platform shall be able to target 2 -3 L Cr. of annual transaction value and in **the long-run (10-12 years) it could potentially capture as much as 5% of India's nominal GDP** in terms of transaction value. The aspiration is in line with benchmarks of global best-in-class e-procurement portals (such as ChileCompra, GeBIZ and KONEPS) which capture anywhere between 4.5% - 6% of their respective countries' GDP through online transactions supported by their respective platforms.

## 2.3 Key Features Supported by the GeM Platform

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### 2.3.1 Registration

The GeM registration process shall be driven by principles of ease, convenience and minimal data entry. The following key considerations shall be considered in designing the GeM registration process:

- Registration shall be trust based (self-certified) and validated exclusively through online integration with domain databases
- Aadhaar shall be used as the primary user identification proof
- Transfers/personnel movement shall be supported seamlessly by clear distinction of user and post

Monitoring and re-verification for detection of inactive user accounts

User accounts shall be regularly monitored to detect inactive accounts. For accounts that the GeM platform deems inactive basis criteria that GeM may layout and revise from time to time, users shall be required to re-verify their details in order to ensure that the accounts are active and updated. The GeM platform shall reserve the right to deactivate accounts that are deemed unfit or inactive to maintain the sanctity of the platform.

## 2.3.2 Catalogue Management (CMS)

As a marketplace, one of the founding pillars of the GeM platform shall be its goods and services catalogue. Given the multitude of buyer organizations that will transact on the platform and their large procurement needs, the scale and the spread of the type of transactions on the GeM platform shall be enormous. A robust Category Management System shall be fundamental to be able to support a standardized buying process, create a competitive market and provide the buyer with search and compare capability. The GeM platform shall thus provide a rich catalogue with complete information of the features and specifications of the offerings.

### 2.3.2.1 Product and Service Taxonomy: The United Nations Standard Products and Services Code

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The GeM CMS shall be based on The United Nations Standard Products and Services Code® (UNSPSC®)<sup>4</sup>, managed by GS1 US for the UN Development Program (UNDP). However, efforts to develop harmonized and customized codification system in association with other partners such as GSTN, Railways etc shall be made.

### 2.3.2.2 Standardization of Technical Specifications/Parameters

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The technical specifications constitute a critical aspect of public procurement. One of the key facets of the GeM platform shall be the standardization of these specifications/parameters. GeM shall provide standardized templates of technical parameters (TP), for both goods and services, designed to maximize objectivity.

This standardization of parameters shall be the principal virtue of the GeM platform that differentiates it from the prevalent offline processes and systems. This shall lend itself to GeM being a fair, open and

brand agnostic platform. In addition, while procuring on the GeM platform, buyers shall not need to invest the time or effort required in identifying the right list of parameters that comprehensively constitute the product or service.

The TPs on the GeM platform shall be demand driven, market-aligned, consultative and dynamic. In a scenario where the buyer finds the Technical Parameters defined on the GeM platform for any good or service as not sufficiently comprehensive and requires parameters to be either added or modified, the buyer shall be able to inform GeM of its requirements. This process shall be inbuilt into the platform to the extent possible. Standard Operating Procedures (SOPs) for such upgrades and updates of TP of GeM catalog will be dynamic and evolving, without compromising on the need to keep the GeM catalog generic at all times.

### 2.3.2.3 Goods and Services Supported on the Platform

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The GeM platform shall be a dynamic marketplace where new categories of goods and services are continuously added. The platform shall provide buyers and sellers with the functionality to suggest the goods/services they need supported. The list of goods and services excluded from the platform shall also be clearly published on the platform and may be subject to change as the platform matures.

<sup>4</sup> GeM reserves the right to add to this classification system and customize it as and when needed

## 2.3.3 Order Placement and Fulfillment

### 2.3.3.1 Buying Modes Supported

The GeM platform shall provide three primary buying modes and the appropriate use of the buying mode shall be indicated by the platform as per the total value of the procurement. The three buying modes are Direct Purchase, Direct Purchase with L1 and e-bid/RA. The GeM platform shall reserve the right to set the thresholds of transaction value for the applicability of each of the buying modes based on the GFR and related guidance issued by Ministry of Finance, Government of India from time to time. All decisions related to use of the modes available on GeM shall be made solely and exclusively by the buyer with required approvals from the competent authorities.

#### Direct Purchase and Direct Purchase with L1

Direct Purchase mode shall be allowed for low value transactions and shall allow the buyer to directly procure from any available seller on GeM that meets the requisite quality, specification and delivery period as specified by the buyer.

The Direct Purchase with L1 mode shall be allowed for mid value transactions and shall allow the buyer to directly procure from the L1 seller after comparing all available sellers on the platform that meet the requisite quality, specification and delivery period as specified by the buyer. The comparison must be made between goods/services of at least three different manufacturers/OEMs and three different sellers.

The GeM platform shall provide buyers with a robust search and filter functionality to enable them to specify their exact requirements. It shall also provide the buyer with the functionality to exercise purchase preference in these modes by providing filters such as Make in India, MSE etc. as per extant Government of India policies and guidelines. The platform shall also recommend buyers to purchase from sellers meeting local content/MSE when the prices are comparable with the market L1 price.

These modes shall allow buyers to make time efficient purchases and have strict delivery and payment timelines.

#### E-bid/Reverse Auction

The **E-bid/Reverse Auction mode** shall allow buyers to conduct an electronic bid for the goods and services on the platform.

The creation of bid documents as well as system driven evaluation will be driven through well-defined and standardized technical parameters and the bid terms and conditions.

The General Terms and Conditions, Special Terms and Conditions and Additional Terms and Conditions provided by the platform shall address the general requirements for floating e-bids/RA on GeM.

The GeM platform shall provide buyers with the option to customize the bid as per their requirement by way of objective selections. The buyers can raise requirement for further customization of the bid terms and conditions in line with the standardized GeM catalogue. This is inline with GeM's objective of maintaining standardization and objectivity throughout

the procurement process. All e-bids and RAs on GeM shall be exclusively completed through the GeM platform with no reference to any outside source or links.

The GeM platform shall provide a system driven evaluation of the bids and identify the shortlisted i.e. responsive bids. While the buyers are suggested to heed the system recommendation, the buyers shall reserve the right to download the evaluation as well as override the system evaluation. In case of offline bid evaluation, buyers shall be required to provide a summary of the outcome on the platform. In certain situations where Quality and Cost Based Selection (QCBS) is absolutely necessary and requires direct interface like presentations and in person consultation, such as hiring of consultant/project buying, the buyers shall appropriately capture the offline steps on the platform as part of bid evaluation.

### **Proprietary Article Certificate (PAC) Buying**

The GeM platform shall allow buyers to procure on a proprietary basis by using the PAC filter provided on the GeM platform, which allows the selection of a specific model/make from a particular seller that is available on the platform.

For PAC procurement, Direct Purchase buying mode and bidding/RA buying mode (above threshold value) shall be allowed.

### **2.3.3.2 Additional Features provided while buying on GeM**

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#### **2.3.3.2.1 Demand Aggregation**

Demand Aggregation shall allow buyers (primary user) to aggregate demand across buying teams. For instance, the central Ministry can aggregate common or aggregate demand across states under a common bid. Demand aggregation results in better, more competitive prices as the volume of the order placed with the single seller is large thereby allowing economies of scale. While the bid is centralized, orders invoices and payments thereon can be assigned to individual and multiple agencies on GeM. The GeM platform shall enable demand aggregation services for identified categories with assured reasonability of price.

#### **2.3.3.2.2 Bunching / Bundling**

Bunching is a process of buying multiple goods in a single order i.e. through a single seller whereas bundling is a similar process of buying goods along with related services. A significant portion of buying constitutes purchasing multiple goods / services together. The GeM platform shall allow bunching / bundling of multiple goods / services as per pre-defined categories where sellers selling these multiple goods / services are available.

This shall help users reduce the need for multiple orders and shall result in prices that are more competitive.

#### **2.3.3.2.3 Multi-cart**

The GeM platform shall provide its buyers with the multi-cart feature that shall allow the buyers to have many carts simultaneously. This shall enable the buyer to save the items in the cart for a specified duration. The rates for the specific quantity of items held in the cart shall be frozen for the carting period against any upward revision. However, in case of a downward revision in the offer price of an item in the cart, the revised price shall be made available to the buyer. Validity of the items and offers carted shall be limited for a period of time after which cart shall be emptied automatically.

#### **2.3.3.2.4 Proof of Non-availability of Sufficient Competition or Unsupported Good/Service**

The GeM platform shall be a dynamic online marketplace with new categories of goods/ services continuously being added. In situations where the product/service is not supported on the platform or there is insufficient competition basis specifications input by the buyer including

service shall be deemed not available for procurement on the GeM platform and the buyer shall be allowed to procure via the offline mode. In such situations, the buyer shall be allowed to download a report for the purpose of audit and shall allow the buyer to show verifiable proof for procuring outside the GeM platform.

### **2.3.3.3 Order Fulfillment**

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The GeM platform shall lay down a standardized process with definite timelines for order fulfillment and provide both buyers and sellers with the functionality to track the order fulfillment process. The platform shall enforce buyers and sellers to adhere to the online process, update the required information and issue invoices or certificates as applicable and in a timely manner.

All key documents for order fulfillment and payment such as the purchase/sanction order, invoice and bill shall be generated by the platform based on user input and selections. GeM shall stipulate the timelines for the different stages of the process such as delivery of the goods/services, generation of Provisional Receipt Certificate (PRC) and generation of Consignee Receipt and Acceptance Certificate (CRAC). Users shall be subject to appropriate rating and action in case of non-adherence as per GeM policy notified from time to time on the portal.

### **2.3.3.4 Contract Management**

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In keeping with the principles of speed, efficiency and minimal manual interference, the GeM platform shall auto-generate the contract basis the specified technical parameters and the details chosen by the buyer such as delivery period and delivery terms.

The General Terms and Conditions (GTC), Product / Service specific Special Terms and Conditions (STC) and Bid / RA specific Additional Terms and Conditions (ATC) shall be published on the GeM platform. These shall constitute the contract generated on the platform. The Terms and Conditions stipulated in STC will supersede those in GTC, and the Terms and Conditions stipulated in ATC will supersede those in GTC and STC in case of any conflicting provisions. The platform shall provide buyers with the functionality to edit the auto populated terms and conditions within the overall GeM legal framework. GeM shall also provide the functionality of updating the contract along with version control and audit trail.

### **2.3.3.5 Payments**

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The GeM platform shall support 100% online payments to ensure a truly cashless procurement process. This will not only make the process efficient but also improve timely payment assurance. The platform shall, therefore, support multiple online payment modes in order to maximize convenience and utility for its users. The platform shall also support e-EMD and e-PBG to stay true to its aspiration of 100% online payments.

The GeM platform shall provide users with a payment gateway to support internet banking as well as allow integration with the different payments systems used by buyers such as Public Financial Management System, State GeM Pool Account, Controller General of Defense Accounts, Centre for Railway Information Systems, Central Reserve Police Force Payment System etc.

Additionally, the GeM platform shall support the integration of the different ERP systems (SAP/ Oracle etc.) that are used by the buyers to maximize efficiency and seamlessness. GeM shall lay down definite timelines for payment and enforce buyers to adhere to stipulated timelines. In order to promote timely payment, GeM shall constantly endeavor towards and encourage pool account based payments as the preferred payment mode on GeM.

#### **2.3.3.6 GeM Service levels**

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As an online system for procurement, GeM service levels shall aim at maximum efficiency in its operations from placing a demand to closing with payments on time for contracts fulfilled. Each of the steps across transactions shall have specified time for performance by both sellers and buyers. All appropriate measures shall be taken to ensure that both buyers and sellers adhere to these terms and conditions. These measures shall include ratings (parameters), issuing notices, watch list and defaulters being disabled. All actions under this segment shall be notified to all users and reflected appropriately for further transactions.

#### **2.3.4 Decision Support**

Beyond the cost and time benefits intrinsic to GeM, GeM shall provide its users with additional value add by providing decision support that helps them achieve better value-for-money and efficiency.

##### **2.3.4.1 Business Intelligence and Analytics**

Analytics helps organizations in harnessing their data, and in using it to make more informed, evidence-based decisions, which in turn leads to increased operational efficiency and savings. The GeM platform shall provide its users with personalized dashboards to track overall transactions and the performance of the buying/selling organization and reports for transaction summary, payment due, non-adherence of payment/delivery SLAs etc. The platform shall enable buyers to monitor the trend of their procurement and adherence to the different directives like Make in India and MSME Policy.

Additionally, the GeM platform shall provide the larger ecosystem of users with intelligence and analytics on spend trends, registration trends, yearly procurement trends, key goods/ services etc. which shall help in understanding the procurement landscape in India better and making data led decisions. The analysis of the transactional data on the platform shall enable the policymakers from MSME and DIPP to recognize key challenges and review and revise procurement policies accordingly.

##### **2.3.4.2 Information Visibility**

The GeM platform shall provide the buyer with the credentials of the seller such as the financial credentials, past experience and preferential seller credentials such as registered MSE or startup. The platform shall also ensure visibility for MSE/local sellers and startups. Further, the platform will enable sellers to indicate the percentage of domestic content in their goods and services, promoting the Make in India order. The platform shall support real-time sharing of information relating to all procurement notices through the integration of CPPP.

#### **2.3.4.3 Establishing Price Reasonability**

While the responsibility to ascertain the reasonability of price for any buying on GeM shall rest solely with the buyer, GeM shall provide the buyer with multiple tools to help the buyer ascertain price reasonability. This includes the comparison of prices across other e-commerce sites (wherever available), discount over MRP, Last Purchase Price on GeM and the prices at which transactions have been conducted on GeM for similar items in the recent past. GeM shall also incentivize buyers to contribute to the price rigor on the platform by sharing relevant information.

#### **2.3.4.4 Buyer and Seller Rating**

In a trust-based system like GeM, ratings become a key component in the overall system. GeM shall provide a rating system that evaluates performance on a continuous basis based on weightages to various parameters. This will reward well-behaving buyers and sellers, incentivize good buying behavior and cultivate competition in performance amongst sellers.

#### **2.3.4.5 Vendor Assessment**

GeM shall provide the facility for availing services (third party) for Vendor Assessment relating to technical / financial capacity and experience including manufacturing/testing facilities/quality control arrangement(s) of manufacturing premises. Vendor Assessment to ascertain the quality of a product or service will also be provided. Sellers shall be incentivized to opt for the assessment as it will be factored into GeM ratings and the product/service will be marked verified which shall be a filterable parameter that the buyer can use in their selection process. This will aid buyers in the decision-making process.

#### **2.3.4.6 Demand Forecasting**

GeM shall forecast demand basis the analysis of historical data on the platform and the data provided by buyers as part of their annual procurement plan. This will help sellers plan better and in turn ensure availability of required goods/services and lower prices for the buyer.

#### **2.3.5 Quality Assurance**

The GeM platform shall do away with some of the traditional quality assurance processes like centralized seller registration and verification, advance sampling and inspection. It shall instead have a set of internal checks and controls to drive quality on the GeM platform. These shall include intrinsic elements across the different modules on the platform such as automated validation for registration, standardized templates of technical parameters in the category management system, ratings and vendor assessment as part of decision support and watch listing and suspension as part the Incident Management policy. Together these shall effect a robust quality assurance mechanism.

In addition to the above controls, a Quality Assurance Team will maintain the sanctity of the market on the GeM platform. Random checks shall be conducted periodically for verification of user accounts and related data, price reasonability, integrity of product and service listings, and adherence to the terms and conditions of the platform s.

In order to effectively monitor the health of quality of GeM platform, a Quality Framework will be instituted with a set of quality related KPIs. GeM shall regularly publish a quality report based on this framework to highlight the progress made on improving quality of the platform.

### **2.3.6 Audit Trail**

GeM has been envisioned as a trust based system, and this shall be the basis for many decisions on the platform. In order to effectively implement this system, GeM shall institute a set of internal checks and controls. A key aspect amongst these shall be GeM maintaining an audit trail i.e. a securitized chronological record that provides documentary evidence of the sequence of activities carried out on the platform during any transaction that takes place on the platform.

The purpose of keeping audit trail in the system is to allow Auditors to evaluate the process transparently, and review the choice of filters, data, evaluation criteria and confidentiality techniques that are used on the platform. Audit trail also aims to ensure that fair practices are adopted in technical and financial evaluation of bids.

An automated process shall be put into place by GeM to extract logged information generated during different stages of procurement transactions on the platform. Using few key fields such as contract number, organization name etc. a bid summary sheet that captures different artifacts, input/output data and events, can be generated for auditing purposes.

### **2.3.7 Communication and Support**

GeM shall provide a standardized and single channel for communication with stakeholders through its contact center and domain mail.

#### **2.3.7.1 Communication to Buyers and Sellers**

GeM shall send out communication to keep all stakeholders updated with all relevant changes/ notices etc. related to GeM. GeM shall use multiple modes to communicate with its users depending on the information to be conveyed and its criticality.

GeM shall inform users in the case of new product/service categories being added, end of life information, change in technical parameters of goods/services, new bids creation or modification etc. GeM shall also from time to time have promotional and marketing events for which related communication shall be sent to buyers and sellers. All such information shall also be made available on the various social media sites of GeM.

#### **2.3.7.2 Contact Center**

GeM shall be supported by a contact center well equipped to handle the different queries users may have. The GeM contact center shall support inbound and outbound customer communication across different communication channels i.e. telephone, web, chat, email and social media. Since the contact center shall service stakeholders across different geographical regions in India, it shall support English, Hindi and certain several regional languages. An escalation matrix with well-defined SLAs shall be provided to ensure users receive expert help as needed. GeM may use all communication (incoming/outgoing) from the center in case of any query/grievance/any other request.

#### **2.3.7.3 Training and Material**

Adequate training support and assistance shall be critical for the success of the GeM platform. The users of GeM shall not have to face any challenges in using the platform effectively. Thus, central and regional training as well as the availability of adequate training material on the platform shall be ensured. GeM may design e-procurement certifications and offer trainings to certify professionals specialized to procure via the GeM platform.

### 2.3.8 Dispute Resolution and Incident Management

GeM shall be a trust-based system and hence it shall be extremely critical to support a structured and automated Incident Management process to penalize any deviant behavior. On a platform as large as GeM, disputes between buyers and sellers is bound to occur. While GeM provides the platform facilitating these transactions, GeM shall not have any authority, legal or otherwise to resolve disputes or redress grievances. It shall thus be extremely important to ensure that users are cognizant of the fact that GeM is, at the crux of it all, only a platform and cannot and does not take over the onus of ensuring that every transaction through it is error free and assured. Thus, while GeM shall take administrative action as per the process published, in cases where grievance redressal beyond the platform is required, arbitration process shall be applicable and GeM shall not be a party to this process.

- The role of GeM in Incident Management shall be three fold and limited to:
- Making available all the information that may help in the resolution of the dispute.
- Providing notice and reasonable opportunity to the party to provide justification
- Taking appropriate administrative action, limited to the platform, against the buyer or/and seller as the case may be

GeM shall support a holistic framework for incident management, where deviations on GeM shall be categorized into three levels, namely: mild, serious and severe. An appropriate administrative action shall be administered on a case-to-case basis. The penalty may range from having the deviations recorded against the seller/buyer to blocking or suspending of the defaulting buyer/seller account and a blacklisting recommendation to the Board/Ministry of Commerce.

### 2.3.9 Data Security

GeM shall be responsible to ensure the privacy and security of the data on the platform. Adequate measures shall be taken to ensure that the GeM platform adheres to the highest standards of information security and user privacy.

## 2.4 GeM Procurement Guidelines

Public procurement in India is currently guided by multiple well-founded procurement guidelines and policies. Since these policies were drafted in a time before GeM, they were primarily designed in accordance with the offline procurement process and not with an online marketplace in mind. Thus, certain operational design elements of these policies may not be entirely relevant on a standardized technology-driven platform like GeM. With the advent of GeM, it is critical for the essence of these policies to be maintained and brought together in a comprehensive marketplace procurement process that shall apply to all procurement on GeM. The GeM procurement process is built on fundamental principles of

public procurement i.e. transparency, value for money and openness of competition. However, by virtue of it being a technology-driven platform, the mechanism and processes by which it achieves these objectives may change from the past.

Thus, a set of GeM procurement guidelines for operating on GeM shall be drafted and shall apply to all buyers and sellers on the platform independent of the respective procurement policies applicable to them outside of the platform. For procurement made on GeM, buyers shall abide by the GeM procurement guidelines and shall not be subject to compliance issues arising from different policies that may be applicable to them when they procure offline/outside GeM.

Some of the indicative directives/processes that currently exist and shall be re-aligned for the GeM context include:

- Minimum three weeks time to be allowed for submission of bids (Rule 161)
- Procurement by Limited Tender Enquiry in cases of urgent need (Rule 162)  
Evaluation of technical bids to be conducted
- by Competent Authority or Technical Committee (Rule 163,164)  
Bid Security (EMD) should range between
- two percent to five percent of the estimated value of goods to be procured (Rule 170)  
Performance Security should be for an
- amount of five to ten percent of the value of the contract as specified in the bid documents (Rule 171)  
Procurement of services by Limited Tender Enquiry when the value of the services is less than 10 Lakhs (Rule 201)

Therefore, GeM shall institute a set of procurement guidelines for operating on GeM that shall apply to all buyers and sellers on the platform independent of the respective procurement policies applicable to them outside of the platform.

Procurement on GeM for all buying entities shall be exclusively subject to the GeM guidelines,

terms and conditions as published by GeM on the GeM website, which shall override all concurrent processes differing from or in conflict to the process outlined by GeM. GeM, being a technology-driven platform, shall embed certain facets of the procurement process in the design of the GeM platform. GeM shall provide requisite mechanisms needed to comply with the intent of the various related central procurement policies and guidelines defined by the different domain ministries. For procurement made on GeM, buyers shall not be subject to compliance issues arising from different policies that may be applicable to them when they procure offline/outside GeM and are not applicable on the GeM platform. For all circumstances not covered by the GeM guidelines, terms and conditions, the buyer shall adhere to the General Financial Rules and/or the procurement guidelines of the respective entity.

GeM has been established as the national procurement portal. Thereby, GeM shall seek to design its procurement process and guidelines in adherence to the national level directives from the Government. GeM will continuously look to new ways of supporting these policies while adhering to the design principles intrinsic to GeM. All policies relating to various aspects of GeM transactions shall be available online and user feedback shall be inbuilt on the platform.

### **Applicability of the guidelines to services**

It is important to recognize that the assessment of quality for services is a continuum. On one end, there are a set of standard services where complexity is low and quality may be assessed by way of a set of technical specifications. This gives way to slightly complex services, including the bundling of goods and services. In such cases, it may be important for the buyer to establish relevant work experience as a measure of quality. And on the other end, we have project-based buying where quality may be ascertained by multiple aspects such as financial net worth, approach and methodology, and current set of completed and ongoing works. Thus, GeM shall enable the buyer to make an informed decision basis these different criteria and basis where the services lie on the continuum, thereby capturing the essence of Quality and Cost Based Selection.

Thus, the procurement process for services on GeM, similar to goods, shall be standardized and inbuilt into the system and buyers shall not need to follow any concurrent processes that may be applicable in the offline procurement process.

### **Entities covered by the guidelines**

The GeM procurement guidelines shall be issued pursuant to Rule 149 of the General Financial Rules 2017. It has been mandated as per GFR Rule 149 that if a product/service category is

available on GeM, all Ministries and Departments shall procure through GeM. Thereby, the guideline shall apply to all Central Ministries and Departments and the respective Central Public Sector Enterprises (CPSEs) under them. The guideline shall also be extended to States and UTs and the respective State Public Sector Enterprises (SPSEs) and any other Public Sector organizations by way of a Memorandum of Understanding (MoU) between GeM and the respective entity. The list of entities with which GeM has entered into a MoU shall be published on the website and will be continually updated. Thus, the mandate to procure from GeM and the applicability of this guideline shall also fall onto all buyers falling under the purview of these entities.

All other buyers like autonomous bodies, apex institutes, charities and other entities where significant government funding is received shall be recommended to use GeM for the procurement of goods and services to the extent possible and follow the guidelines stipulated herein. A detailed description of GeM procurement guidelines has been covered as part of Appendix B.

## **2.5 Monetization on the GeM Platform**

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### **2.5.1 Introduction**

GeM has been setup as a Section 8, not for profit organization. Beyond the initial grant of Rs 200 Cr, GeM is expected to self-sustain its operations. GeM will thus need a means of sustenance for the organization and its marketplace platform. A monetization model to generate revenue, to create and cover the following cost elements to sustain operations, shall be required:

1. Technology and Platform cost - Payout to the Managed Service Provider (MSP)
2. Personnel Cost – Cost of personnel including Performance Linked Incentives
3. Marketing Expenses – Expenses incurred in spreading awareness and increasing engagement on GeM
4. General and Admin Expenses – Day-to-day operations expense including contractual services
5. Innovation & Grievance Redressal Fund – Funds for growth and innovation or unexpected exigencies

**Objectives of the revenue model – The key objectives of the revenue model shall be to:**

1. Recover costs and self-sustain GeM
2. Generate funds to fuel innovation and growth
3. Maintain a corpus/buffer for windfall changes

Multiple potential monetization streams exist for GeM and may be applied such as one time fees like registration fee or listing fee and recurring fees like annual fee, transaction fee, paid advertisements, value-added services fee etc. GeM shall have the remit to alter the revenue generation mechanism in terms of the sources that it chooses to monetize and the quantum of the charge or fee it fixes. In addition, the revenue model shall be leveraged to drive desired market behavior among buyers and sellers by means of incentives and penalties and help achieve GeM marketplace objectives.

A two-fold revenue model may be instituted for GeM

1. Transaction fee model - **Primary model for revenue generation and cost recovery.**
  2. Behavior-based incentives model – **Incentives/disincentives based on specific user behavior to help achieve GeM marketplace objectives.**
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## **2.5.2 Mechanism of Revenue Generation**

### ***2.5.2.1 Primary Revenue Generation Model***

**Key elements of the transaction charge model are as follows:**

Since GeM provides a platform for both buyers and sellers to conduct transactions, both buyers and sellers may be charged a small % of their transaction value as transaction fee. Sellers may be charged more than buyers in line with the value they derive out of GeM in terms of ease of doing business with the Government .

GeM may also exercise its option to charge transactions only above a certain minimum threshold transaction value or it may lay a differential charge on different thresholds of transaction values. This shall be designed in accordance with the premise that the user willingness to pay will be higher in big-ticket transactions. This shall also ensure higher feasibility of implementation and revenue realization for GeM.

GeM may also explore categorizing product and service categories basis their margin potential into buckets such as High, Medium, and Low margin potential. Higher margin categories may be charged a relatively higher % of the total transaction as there shall be higher willingness to pay for sellers.

Thus, a transaction fee matrix, clearly laying out the charges applicable on buyers and sellers across types of goods and services and across ranges of transaction value, shall be developed and deployed on a periodic basis. This matrix shall be designed as per cost recovery principles and shall be revised periodically depending on how revenue tracks against the costs.

### ***2.5.2.1 Behavior-Based Incentives***

**Registration Fees and Listing Fees shall serve as secondary revenue generation streams wherein the primary aim of levying these charges shall be to drive right market behavior and incentivize/disincentive the participants in line with the marketplace objectives.**

A one-time registration fee for sellers shall help maintain the sanctity of the seller base and drive a sense of discipline in the registration process, prevent sellers from creating multiple, unnecessary accounts and reduce the number of inactive sellers in the system since only serious sellers register. Similarly, sellers shall be charged a small listing fee i.e. a fee for every time the seller wishes to list a new product or service. The fee shall be minimal with the primary objective being to maintain the sanctity of the marketplace and ensure discipline in the listing process.

A few illustrative incentive schemes are as follows:

**Product Upload** - To incentivize correct listing process, sellers who make 10 error free listings consecutively can be allowed to make the next 5 listings for free i.e. no listing fees will be levied.

**Pricing** - To incentivize competitive discounting, top sellers that offer the maximum discount on a monthly basis can be given one month of charge free transactions. The rules and incentives shall be changed from time to time depending on desired behaviors to be driven through the marketplace.

### 3. GeM Organisation (GeM SPV)

As stated earlier, the Government e Marketplace Special Purpose Vehicle (GeM SPV) has been set up to develop, manage and maintain the GeM platform. To be able to successfully deliver the GeM platform as described above, it is critical for the GeM organization to have a clearly defined strategic and operating model in place.

ii. Establish a lean, dynamic organization capable of continuous innovation and market driven decision making.

iii. Build an easy to use, fully automated, trust based platform to ensure transparency and efficiency in procurement.

iv. Demonstrate commitment to delivering value by ensuring right quality at right price.

v. Create a sustainable ecosystem covering all stakeholders and driving inclusive development in India.

#### 3.1 Vision, Mission and Values for GeM SPV

In line with the founding principles of GeM, as laid down by the Cabinet Note dated 7th April 2017, the vision for GeM articulates the aspiration that GeM shall seek to achieve. The vision for GeM is thus stated as:

**“To effect an evolution in public procurement promoting a transparent, efficient and inclusive marketplace”**

The mission statements lay down the operational facets of what the GeM SPV shall do in order to realize GeM’s stated vision. The five mission statements for the GeM SPV are laid down as:

i. Institute a unified procurement policy to encourage behavioral change and drive reform.

The values for GeM SPV are intrinsic to the identity it aspires to build. These values are in line with the beliefs that are core to the GeM organization and its key stakeholders. The values system that GeM shall thus subscribe to can be explained by a set of seven fundamental values. These are: **Innovate to Simplify, Ownership and Accountability, Be Bold and Think Big, Responsiveness, Commitment, Transparency and Integrity and Social Inclusion.**

## 3.2 Organization Structure

Any typical e-commerce marketplace needs to support 6 key processes:

- Buyer related processes (e.g. training and onboarding, key account management)
- Seller related processes (e.g. category management, pricing)
- Platform related processes (e.g. analytics and reporting, customer care)
- Strategy related processes (e.g. business planning, partnerships and alliances)
- Technology related processes (e.g. product development, data warehousing)
- Internal support processes (e.g. HR, finance, legal support)

In order to execute these processes efficiently, it is important for GeM SPV to have a well-defined organization structure which is lean, dynamic and market linked. This organization should have capabilities to build and maintain the platform and fulfil the GeM vision. Therefore, GeM SPV organization structure has been designed in accordance with best practices from global benchmarking e-procurement, e-commerce players (such as Amazon, ChileCompra, GeBIZ and KONEPS). GeM SPV CEO's organization will have 5 key functions: Marketplace, Technology, Strategy and Planning, HR and Admin and Finance. In addition, the organization will also house Centers of Excellence<sup>5</sup> to play advisory role on select topics of strategic importance/academic research.

Given government procurement involves multi-crore rupee transactions on a daily basis, it is also important for GeM to be able to execute its operations with utmost transparency. Therefore, GeM SPV will also house an Ombudsman. A detailed organization structure has been developed and has been adopted by the Board as of 5th April 2018.

### 3.2.1 Model for Talent Acquisition

The Cabinet Note lays down provisions for multiple sources for GeM to build the required capability and talent:

1. Government employees:

Government employees hired as full-time employees of GeM SPV.

2. Market employees:

SPV Market: Market employees hired for critical roles as full-time employees of the GeM SPV

PMU: Market employees hired on a contractual basis as part of the Project Management Unit of the GeM SPV

3. Managed Service Provider:

GeM shall engage a Managed Service Provider (MSP) to deliver the technical and certain operational capabilities of the online marketplace platform.

In order to scientifically identify the right sourcing mechanism for various roles, a two-pronged approach shall be followed:

1. Strategic Importance or Criticality: Only the most critical roles shall be hired permanently into the SPV whereas other roles shall be hired on a contract basis in the PMU

2. Specific Skillset Requirement: Given that GeM SPV aspires to build a world-class e-procurement marketplace, many specific technical and operational skillsets are required. Such specific skillsets shall be sourced from the market.

<sup>5</sup> A detailed document has been prepared that details the process to be followed in setting up the CoEs

Since the GeM SPV aspires to be a dynamic, market-linked organization capable of continuous innovation and market-driven decision-making, the GeM SPV shall maintain a healthy balance of Government and market sourced employees as per talent the strengths and capabilities required.

### 3.2.2 Organization Strength

Role of a Managed Service Provider (MSP) has been envisaged at GeM to deliver the technical & operational capabilities of the online marketplace platform. However, in order to cater to the other elements of the complete ecosystem (such as Buyers, Sellers, Institutional Partners etc.) and address all other organizational aspects (such as Strategy, HR, Admin etc.), a significant workforce will need to be recruited by the GeM SPV. In addition, workforce will also be required to monitor the deliverables of the MSP.

The GeM SPV has received the approval to build a 200 – 250 member organization (full-time employees + contracted PMU employees) by FY 21. Beyond that, the scale and structure of the organization shall depend on the growth of GeM and the evolution of the scope of GeM.

## 3.3 Functioning of the GeM SPV

### 3.3.1 Key Activities to be conducted<sup>6</sup>

For effective functioning of the GeM SPV, the following 8 key activities shall be conducted as per detailed process maps that have been developed.

1. *Annual Business Plan*
2. *Quarterly Business Plan*
3. *Buyer Health*
4. *Seller Health*
5. *Order Fulfillment*
6. *Marketplace Health*
7. *New Product Innovation*
8. *New Business Initiatives*

### 3.3.2 Key Capabilities Required<sup>7</sup>

To drive meaningful business results at GeM, and basis benchmarking of similar organizations as well as priorities of GeM SPV organization, 12 key capabilities have been identified that GeM SPV shall actively work towards building/acquiring to deliver on its goals.

<sup>6</sup> A detailed document has been prepared that details the 8 key activities along with the high level process to be followed along with the RACI matrix

<sup>7</sup> A detailed document has been prepared that details the steps that GeM SPV should take in order to develop these capabilities

S.No	Key Capability	Description
1.	Market/Pricing Intelligence	Market intelligence to ensure value for stakeholders i.e. right quality at the right price through extensive pricing benchmarks and knowledge.
2.	Policy Creation & Maintenance	Development and maintenance of unified marketplace procurement policy applicable to all buying on GeM to enable standardized e-procurement.
3.	Contract Management	Framing, execution and monitoring of contracting through the platform
4.	Product Development	Agile and robust product development process
5.	Payments Integration	Seamless online payment integration
6.	Advanced Analytics	Strong analytics engine, techniques (e.g. AI) to ensure data-led automation (demand forecasting, product recommendations, demand aggregation etc.)
7.	Process Definition & Monitoring	Internal systems and monitoring mechanisms to ensure tightly run business process with well-defined roles and responsibilities
8.	Customer Centricity	World-class customer care, registration, training and onboarding procedures to ensure a seamless experience for buyers and sellers while using the platform.
9.	Collaboration	Collaboration with buyers and sellers to identify improvement opportunities
10.	Execution Focus	Strong focus on execution through quick decision making and prioritization
11.	Adaptability	Flexible organization to readily adjust to scale and market requirements
12.	Policy Implementation	Implement, rollout and monitor compliance to marketplace procurement policy

### 3.3.3 Centers of Excellence

In order to build sustainable capabilities and achieve its long-term aspirations, GeM shall create Centers of Excellence (CoE) within the organization. These centers will serve as think tanks on matters of strategic relevance to GeM in line with its Vision, Mission and Goals. The focus areas of these CoEs may be revised from time-to-time based on changing strategic imperatives for the organization. For a topic / subject area to be deemed fit for the creation a CoE, it must fulfil the following pre-requisites:

- It should be a matter of strategic relevance to GeM in the long term, in line with GeM's vision, mission & goals
- It should help foster innovation in areas outside day-to-day mandate of GeM teams
- It should have sufficient scope to leverage partnerships or collaborations to source relevant expertise

A PoC driven approach may be taken to formulate CoE topics. To continuously innovate and enhance the efficiency of the marketplace, GeM may carry out several PoCs within its teams

from time to time. Some of these PoCs may prove to have the potential for significant impact on the GeM ecosystem in the long term, and may require dedicated research and development effort. Such PoCs may be considered as potential CoE topics / subject areas.

A pipeline of such topics / subjects that may be suitable for creation of a CoE shall be reviewed periodically for consideration of creation of a new CoE. The periodic review mechanism shall also provide the opportunity to augment existing CoEs basis the progress made by them.

A CoE shall have an independent budget and well defined KPIs for performance monitoring. A detailed set of guidelines shall be established by GeM to lay out the following key contours for setting up and running CoEs:

- Determining the budget and KPIs for the CoE
- Mechanism to identify partners for collaboration
- Rules of engagement with CoE partners
- Criteria to determine minimum and maximum lifespan for a CoE

#### 3.3.4 Third Party Services and Support Processes

GeM shall additionally leverage third party services in certain areas of catalogue creation, market sanitization, support services and process audit and in continued services like information security related services, penetration testing and vulnerability testing.

For the critical supporting functions of HR and Finance, detailed HR Manual and Financial Manual have been developed and approved by the Board of GeM. The GeM SPV shall adhere to the basic set of rules and policies that have been laid out as part of these manuals.

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### 3.4 Governance Structure

#### 3.4.1 Equity Structure

As per the Cabinet Note dated 7th April 2017, GeM equity structure has been outlaid as 100% Government owned with a capital infusion of INR 200 crores over FY'18 and FY'19.

The equity structure affects multiple aspects of the organization such as the strategic plan, speed of decision-making and capital and talent sourcing. Therefore, going ahead the competent authority may decide on the appropriate equity structure basis its impact on larger organization goals that are to be achieved.

#### 3.4.2 Board of Directors

GeM SPV Board of Directors shall play a critical role in guiding and shaping the journey of GeM. Since GeM requires expertise from different domains such as policy-making, technology and e-commerce, the Board of Directors for GeM SPV shall be designed basis the required expertise.

Four Board sub-committees shall be instituted: Audit incl. Cybersecurity, HR, Nomination & Remuneration Policy, Procurement Policy & Fraud Avoidance and Technology and Innovation

### 3.4.2 Advisory Council

The advisory council for GeM SPV shall be sourced from relevant fields like public policy experts, procurement experts, global e-procurement or e-commerce entities and shall enable it to:

- Draw on the skills and knowledge of experts who have practical experience in a specific area
- Receive unbiased guidance due to lack of involvement in the business operation
- Fill in any gaps in the organization and ensure critical business functions are being addressed
- Create a potential source of members for the 'main' board as the company grows
- Enhance reputation and credibility in the marketplace
- Increase consumer and stakeholder confidence

## 4. GeM Stakeholders Ecosystem

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### 4.1 Key Role and Responsibilities: Buyers

#### Platform Terms and Conditions

Buyers shall be responsible to remain updated with and adhere to the General Terms and Conditions and all other terms, conditions, policies and guidelines published on the GeM platform.

#### Information Disclosure

Buyers shall be responsible for ensuring that all information submitted on the platform by them is true and complete in all aspects.

#### Procurement Process

Buyers shall be responsible to ensure that procurement is done in compliance with the guidelines of the marketplace (including adherence to the timelines on order fulfillment and payment) and the General Financial Rules and other procurement policies/guidelines notified by the government from time to time as applicable when procuring on the GeM. Buyers shall also be responsible for ensuring appropriate use of the search and shortlisting functionality i.e. the buyer should use the filters provided for direct purchase appropriately and make selection basis the requirement.

#### Price Reasonability

The responsibility to ascertain the reasonability of price for all buying on GeM shall rest solely with the buyer. While GeM shall support multiple tools to help the buyer ascertain price reasonability, buyers must also use the Last Purchase Price as recorded by the buying entity in ascertaining price reasonability. In case of anomalies, buyers are expected to inform the GeM SPV and provide all details related to the more economical alternate source of procurement so that appropriate action can be taken to ensure that price reasonability is restored for all future transactions.

#### Procurement outside GeM

Buyers shall be responsible to ensure that GeM prices are not used for procurement outside

of GeM i.e. to avoid entering into any offline contract with the seller directly based on the outcome of e-bid/RA conducted on GeM.

### **Annual Procurement Plan**

Buyers shall be responsible to provide a projection of their annual demands in the format prescribed by GeM indicating required goods/services along with the specification, quality, quantity, consignee location and time of requirement etc. at the beginning of the financial year. This is as per Rule 149 (vi) of the GFR 2017.

### **Demand Splitting**

Buyers shall be entirely responsible to prevent any misuse of the platform by means of splitting the demand and shall ensure that the right buying mode is used. Demand splitting for the purpose of using Direct Purchase instead of e-bid/RA or for avoiding the necessity of obtaining the sanction of higher authority shall not be permitted. This is as per Rule 149 (viii) of GFR 2017.

## **4.2 Key Role and Responsibilities: Sellers**

- **Platform Terms and Conditions**

Sellers shall be responsible to remain updated regarding and adhere to the General Terms and Conditions and all additional terms, conditions, policies and guidelines published on the platform.

- **Information Disclosure**

Sellers shall be responsible for ensuring that all information submitted on the platform is true and complete in all aspects and shall ensure that they possess key requisites for conducting business.

- **Product/service Listings**

Sellers shall be responsible for ensuring that all statements and claims in their listings are true and complete and are compliant with GeM Terms and Conditions and the applicable provisions of law.

- **Maintaining Integrity**

Sellers shall be responsible for ensuring that the price(s) offered are reasonable and to take all measures.

## **4.3 Interfacing with Other Key Stakeholders: Guiding Principles of Collaboration**

E-Governance has been one of the biggest agenda items in our country. Over the years, a large number of initiatives have been undertaken by various State Governments and Central Ministries. GeM is one such key mega-scale initiative that in the long run shall make significant impact on efficient spending and thus productivity of our country.

GeM shall interact with and have inter-dependencies on multiple stakeholders ranging from the likes of UIDAI, MCA 21, Banks and other financial institutions to the different monitoring and vigilance entities such as CVC, CGA. In today's landscape of rapidly evolving digital disruptions and the challenges posed by related complexities, collaboration between GeM

and these different entities shall thus be critical to ensure the success of GeM. The guiding principles for collaboration between GeM SPV and its partners shall be threefold:

- i. Shared objectives: Partnerships shall be guided by a shared vision and purpose that builds trust and recognizes the value and contribution of each member. GeM SPV and its partners shall strive to set up clear objectives and goals that define the success of the partnership.
- ii. Effective information sharing: The exchange of information and best practices is an extremely important aspect of collaboration. GeM SPV and its partners shall endeavor to institute seamless data sharing and actively explore how the shared information may be used effectively.
- iii. Continuous communication: Effective partnerships are built on trust, openness, and communication. For effective collaboration, both parties shall take measures to remain updated with the others' plans, objectives, and risks that may have consequential effects on the other party.

#### *4.3.1 Collaboration with the Central Ministries*

The Procurement Policy Division's Office Memorandum dated 19.9.2017 notifies the constitution of Standing Committee of GeM (SCoGeM) for guiding, coordinating and reviewing the use of GeM. Thus, each Ministry shall constitute a Standing Committee that GeM SPV shall interface with on different elements such as identification of products and services that GeM should support, monitoring of timely payments, organizing trainings and monitoring the use of GeM by the different bodies under the Ministry.

#### *4.3.2 Collaboration with State Governments and Union Territories*

The State Governments and Union Territories account for a significant portion of the public procurement in India. It shall be important for GeM to onboard all the state governments, UTs and their affiliated bodies. In this respect, GeM SPV shall sign Memorandums of Understanding (MoUs) to enable the State Governments and UTs to make use of GeM for procurement of goods and services. Additionally, as stated in 4.3.1, each State shall constitute a Standing Committee that GeM SPV shall interface with on the different elements of GeM.

#### *4.3.3 Collaboration with Public Sector Units (PSUs)*

Public Sector Units (PSUs) account for a significant portion of the public procurement in India and hence it is of paramount importance for GeM to onboard all PSUs in the country. In this respect, GeM SPV shall actively seek to collaborate and work together with major PSUs to understand their requirements and make their transition to GeM seamless.

#### *4.3.4 Roles and Responsibilities of Other Stakeholders*

The other stakeholders that shall interact with GeM can be categorized into three types: Monitoring and Vigilance, Operations, Payments.

#### 4.3.4.1 Monitoring and Vigilance

The two key entities for monitoring and vigilance are Central Vigilance Commission (CVC) and Comptroller and Auditor General (CAG). The primary objectives behind GeM's inception are highly aligned with the objectives of these entities. Transparency and openness are at the heart of GeM and thereby there exists great potential for collaboration between GeM SPV and these parties.

- GeM SPV shall ensure that the platform has adequate internal checks and a robust system of audit trail thereby facilitating auditors to assess and evaluate the processes, evaluation criteria and confidentiality techniques followed by different buyers.
- GeM SPV will be privy to a large amount of buyer data, which will have multiple applications in monitoring and vigilance, helping the stated parties in identifying irregularities effectively
- GeM SPV shall also commit to extend complete support to the extent possible in case of any conflict or inquiry related to any transaction on the platform

At the same time, the stated parties shall be required to work with GeM SPV to realign the rules for procurement on GeM. Additionally, the stated entities shall ensure that GeM SPV is notified and consulted before the creation of any new rules or process guidelines, which may impact the GeM platform or any related processes of buying / selling on the GeM platform.

#### 4.3.4.2 Operations

An integral part of GeM's value proposition lies in its automated trust based processes. To enable this, GeM SPV has been partnering with various entities, both Government and private, to allow effective data sharing and validation. The resulting environment shall be a complex mix of applications and architectures that shall result in the necessity for the various entities to collaborate with each other to ensure seamless operations. Such key entities include Unique Identification Authority of India (Aadhaar), Goods and Service Tax Network (GSTN), Income Tax Department (PAN), Department of Industrial Policy & Promotion (DIPP), Ministry of Micro Small and Medium Enterprises (MSME), MCA21, Controller of Certifying Authorities (CCA) - e-Sign, DigiLocker etc.

Since GeM SPV shall integrate procedures on its system with these entities, it is necessary for these entities to remain cognizant of the fact that any changes or risks that they encounter may affect GeM. Thus, GeM SPV shall establish effective means for secure data sharing and continuous communication with these entities.

#### 4.3.4.3 Payments

As stated previously, GeM aspires to move to 100% online payments to ensure a truly cashless procurement process. GeM SPV shall require the support of different banks to be able to achieve this aspiration. In this regard, GeM SPV shall actively seek to sign Memorandums of Understanding (MoUs) with banks to collaborate and work together. GeM shall work together with the banks to make available integrated e-payment systems for collection and transfer of payments/e-Earnest Money Deposit (EMD)/e-Performance Bank Guarantee (PBG), fees and charges and any other transactions that may be needed.

## 5. Appendix

### 5.1 Appendix A - Templates for GeM scoreboards

Template for scoreboard to be published on the platform

	Previous Month	Current Month	% Change
GMV (Monthly)			
Number of buyers and sellers			
Number of product and service categories			
% orders with delivery and payment within time & ageing			
% savings achieved			
Number of unfulfilled or cancelled orders			
Number of disputes/incidents registered and resolved with ageing			

Template for scoreboard to be sent to Secretaries and Chief Secretaries

	Previous Month	Current Month	% Change
Overall GMV (monthly)			
Number of buyers and sellers			
Number of product and service categories			
Ministry/State wise statistics			
GMV (monthly)			
Number of buyers			
Number of sellers			
Number of product and service categories procured			
% orders with delivery and payment within time & ageing			
% savings achieved			
Number of unfulfilled or cancelled orders			
Number of disputes/incidents registered and resolved with ageing			

## 5.2 Appendix B - GeM Procurement Guidelines

### 5.2.1 Preface: Role of Government e Marketplace (GeM) in Public Procurement

GeM aspires to effect an evolution in public procurement promoting a transparent, efficient and inclusive marketplace. GeM uses modern technology and enablers and brings together all government buyers on a unified online platform for the procurement of commonly used goods and services. GeM reduces manual process inefficiencies in procurement and provides a paperless and cashless e-marketplace with a streamlined, consistent process for all users.

The nature of the platform is characterized by three core elements

- **Openness:** GeM shall be an open marketplace wherein it promotes access to information and transparency. Relevant information on sellers, products, and services shall be easy to find and readily available for both buyers and sellers. GeM shall provide data-based insights to help users in decision-making and ascertaining price reasonability.
- **Fairness:** One of GeM's key objectives is to allow sellers, big and small, to gain direct access to Government buyers. In doing so, GeM will ensure that all sellers are treated fairly. GeM will not offer preferential or promotional treatment to one seller over the other and shall ensure that all sellers are provided with a level playing field. This will ensure the health and competitiveness of the marketplace.
- **Inclusive:** GeM promotes inclusion, which means that all Government buyers and sellers are accepted on the platform. GeM aspires to create a robust seller base and all sellers interested in conducting business with the Government shall be welcomed on the platform. For buyers and sellers that do not have the know-how of using GeM, GeM shall provide additional assistance in the form of focused training, onboarding sessions and continued feedback and support.

In the evolving procurement process in the country, it is useful to reiterate GeM's role. GeM shall not be a managed marketplace but shall focus solely on being a platform for Government buyers to meet sellers and conduct business. It shall neither own the goods and services sold through the platform nor own the supply and logistics of goods and services transacted on it. GeM shall be a trust-based portal where the buyer holds the responsibility to ensure value for money in any purchase made and the seller holds the responsibility to ensure the accuracy and integrity of all information shared.

### 5.2.2 Applicability

These guidelines are issued in pursuant to Rule 149 of the General Financial Rules 2017. It has been mandated as per GFR Rule 149 that if a product/service category is available on GeM, all Ministries and Departments shall procure through GeM. Thereby, these guidelines shall apply to all Central Ministries and Departments and the respective Central Public Sector Enterprises (CPSEs) under them. These guidelines shall also be extended to States and the respective State Public Sector Enterprises (SPSEs) by way of a Memorandum of Understanding (MoU) between GeM and the respective entity. The list of entities with which GeM has entered into a MoU shall be published on the website and will be continually updated. Thus, the mandate to procure from GeM and the applicability of these guidelines shall also fall onto all buyers falling under the purview of these entities.

All other buyers like autonomous bodies, apex institutes, charities and other entities where

significant government funding is received are recommended to use GeM for the procurement of goods and services to the extent possible and follow the guidelines stipulated herein.

### *5.2.3 Need for Marketplace Guidelines*

Public procurement in India is currently guided by multiple well-founded procurement guidelines and policies. Since these policies were drafted in a time before GeM, they were primarily designed in accordance with the offline procurement process and not with an online marketplace in mind. Thus, certain operational design elements of these policies may not be entirely relevant on a standardized technology-driven platform like GeM. With the advent of GeM, it is critical for the essence of these policies to be maintained and brought together in a comprehensive marketplace procurement process and guidelines that shall apply to all procurement on GeM. The GeM procurement process is built on the fundamental principles of public procurement: that of transparency, value for money and openness of competition. However, by virtue of it being a technology-driven platform, the mechanism and processes by which it achieves these objectives may change from the past.

Thus, a set of GeM procurement guidelines for operating on GeM shall apply to all buyers and sellers on the platform independent of the respective procurement policies applicable to them outside of the platform. For procurement made on GeM, buyers shall abide by the GeM procurement guidelines and shall not be subject to compliance issues arising from different policies that may be applicable to them when they procure offline/outside GeM.

Some of the indicative directives/processes that currently exist but are not relevant or appropriate while transacting on the marketplace (GeM) include:

- Mandate for all Ministries and Departments to publish all tender enquiries and details of bid awards on CPPP (Rule 159, Rule 201).
- Minimum three weeks time to be allowed for submission of bids (Rule 161).
- Procurement by Limited Tender Enquiry in cases of urgent need (Rule 162).
- Evaluation of technical bids to be conducted by Competent Authority or Technical Committee (Rule 163,164).
- Performance Security should be for an amount of five to ten percent of the value of the contract as specified in the bid documents (Rule 171).
- Procurement of services by Limited Tender Enquiry when the value of the services is less than 10 Lakhs (Rule 201).

### *5.2.4 GeM Procurement Guidelines*

GeM has been established as the national procurement portal. Thereby, GeM shall seek to design its procurement process and guidelines in adherence to the national level directives from the Government. GeM will continuously look to new ways of supporting these policies while adhering to the design principles intrinsic to GeM. All policies relating to various aspects of GeM transactions are available on line and user feedback is inbuilt on the platform.

Some of the new processes and mechanisms by which GeM shall support the objectives of the central directives have been detailed below:

- i. Information visibility: Providing buyers with adequate information ensuring visibility for MSE/local sellers and startups. Further, GeM will enable sellers to indicate the percentage of domestic content in their goods and services, promoting the Make in India order.
- ii. CPPP Integration: Ensuring real time sharing of information relating to all procurement notices and results.
- iii. Decision Support: Ratings on GeM provide complete information about buyers, sellers, and

products (including price history) online based on GeM transaction history.

iv. **Monitoring and reporting:** GeM shall provide buyers with dashboards and reports to monitor the trend of their procurement that may help them with adherence to the different directives.

v. **Data based insights:** The analysis of the transactional data on GeM may enable the policymakers from MSME and DIPP to recognize key challenges and review and revise procurement policies accordingly.

Procurement on GeM for all buying entities will be exclusively subject to the GeM guidelines, terms and conditions as published by GeM on the GeM website, which shall override all concurrent processes differing from or in conflict to the process outlined by GeM. GeM, being a technology-driven platform, has embedded certain facets of the procurement process in the design of the GeM platform. GeM shall provide requisite mechanisms needed to comply with the intent of the various related procurement policies and guidelines defined by the different domain ministries. However, it will be incumbent as buyers to ensure compliance with GeM's guidelines, terms and conditions. For all circumstances not covered by the GeM guidelines, terms and conditions, the buyer should adhere to the General Financial Rules and/or the procurement guidelines of the respective entity.

These key facets have been detailed below. Detailed SOPs for the processes (as amended from time to time) shall be published on the GeM website.

#### **5.2.4.1 Qualifications and credentials of Sellers/Service Providers**

By integrating with different Government databases and third-party entities, GeM shall provide the buyer with the credentials of the seller such as the financial credentials, preferential seller credentials such as registered MSE or startup and product or service assessment (Vendor Assessment). GeM shall also provide a seller rating system that evaluates a seller's performance on a continuous basis based on weightages to various parameters that capture quality, reliability and actual performance. Thus, GeM provides a decision support system for qualifying seller credentials by way of the different filters on the platform. GeM shall enable the buyers to customize the credentials needs as per their specific requirement.

#### **5.2.4.2 Standardization of Technical Specifications/Parameters**

The technical specifications constitute a critical aspect of public procurement. One of the key facets of GeM is the standardization of these specifications/parameters. GeM shall provide standardized templates of technical parameters (TP), for both products and services, designed to maximize objectivity.

GeM shall ensure that these parameters are demand driven, market-aligned, consultative and dynamic. Demand-driven means that these parameters will be designed keeping in mind the buyers' requirements. Market aligned means that the parameters will be guided by market knowledge and market trends.

Consultative means that GeM shall consult its buyers, sellers and the respective domain experts as needed to ensure that the TP is designed comprehensively. Dynamic means that GeM shall update and revise the TP as per the changing needs of the buyer and the market.

This standardization of parameters is the principal virtue of GeM that differentiates it from the prevalent offline processes and systems. This lends itself to GeM being a fair, open and brand agnostic platform. In addition, while procuring on GeM, buyers shall not need to invest the time

or effort required in identifying the right list of parameters that comprehensively constitute the product or service.

The standardized parameters also result in standardization of the evaluation mechanism. Thus, obviates the need to set up a Technical Evaluation Committee or Consultancy Evaluation Committee while procuring on GeM.

In a scenario where the buyer finds the Technical Parameters defined on GeM for any product or service as not sufficiently comprehensive and requires parameters to be either added or modified, the buyer should inform GeM SPV of its requirements. SoP for such upgrades and updates of TP of GeM catalog will be dynamic and evolving, without compromising on the need to keep GeM catalog generic at all times.

#### **5.2.4.3 Price Reasonability**

GeM shall provide the buyer with multiple tools to help the buyer ascertain price reasonability such as comparison of prices across other e-commerce sites (wherever available), discount over MRP, Last Purchase Price on GeM and the prices at which transactions have been conducted on GeM for similar items in the recent past. Buyers should also use the Last Purchase Price as recorded by the buying entity in ascertaining price reasonability. The responsibility to ascertain the reasonability of price for any buying on GeM rests solely with the buyer. Buyer will be incentivized to contribute to the price rigor on the platform by sharing relevant information.

#### **5.2.4.4 Modes of Procurement on GeM**

As mentioned earlier, for all products and services available on GeM, buyers must procure through GeM. Since GeM aims to be a one-stop shop for buyers, buyers shall not be required to publish or advertise the opportunity on any platform outside of GeM when procuring from GeM.

GeM supports three primary buying modes and the appropriate use of the buying mode shall be indicated by the platform as per the total value of the procurement. The three buying modes supported are Direct Purchase, Direct Purchase with L1 and e-bid/RA. Thus, all other procurement modes such as Purchase without Quotations or Purchase by Purchase Committee or Purchase through Limited Tender Enquiry shall not be applicable for the products and services available on GeM. Since inclusivity is one of the core elements of GeM, GeM shall not support purchase within a limited seller group. Maximizing the number of competing sellers will only result in better prices for the buyer.

As a marketplace, since all sellers receive real-time notifications when relevant bids are published, minimum period time of 10 days has been deemed sufficient. Similarly, for performance guarantee on GeM, the recommended value is 2% of the contract value. The lower amount of performance guarantee needed on GeM stems from the fact that GeM is a trust-based system with multiple inbuilt systems enabling seller qualification as described previously. Also, lowering the performance guarantee allows GeM to maximize inclusivity and the number of sellers participating and reduce the overall cost of the transaction.

#### **5.2.4.5 Procurement of Services**

As mentioned earlier, the standardization of parameters is a crucial facet of GeM and is a key mechanism by which GeM enables the buyer to ascertain the quality for both products and services.

However, it is important to recognize that the assessment of quality for services is a continuum. On one end, there are a set of standard services where complexity is low and quality may be assessed by way of a set of technical specifications. This gives way to slightly complex services, including the bundling of products and services. In such cases, it may be important for the buyer to establish relevant work experience as a measure of quality. And on the other end, we have project-based buying where quality may be ascertained by multiple aspects such as financial net worth, approach and methodology, and current set of ongoing works. Thus, GeM enables the buyer to make an informed decision basis these different criteria and basis where the services lie on the continuum, thereby capturing the essence of Quality and Cost Based Selection.

Thus, the procurement process for services, similar to products, will be inbuilt into the system and buyers shall not need to follow any concurrent processes that may be applicable in the offline procurement process.

#### **5.2.4.6 Order Fulfillment and Payment**

GeM lays down a standardized process with definite timelines for both order fulfillment and payment. Buyers must ensure that they follow the online process and update the required information/issue certificates as applicable and in a timely manner. The process laid out by GeM shall replace any parallel processes followed currently.

All key documents for order fulfillment and payment such as purchase/sanction order, invoice and bill shall be generated by the platform based on user input and selections. GeM shall stipulate the timelines for the different stages of the process such as delivery of the goods/services, generation of Provisional Receipt Certificate (PRC), generation of Consignee Receipt and Acceptance Certificate (CRAC), and transfer of payment. GeM reserves the right to take appropriate action in case of non-adherence.

#### **5.2.4.7 Contract Management**

The contract shall be auto-generated on the GeM platform basis the specified technical parameters, the details chosen by the buyer such as delivery period and delivery terms and the General Terms and Conditions (GTC) of the platform, the product/service specific Special Terms and Conditions (STC) and the bid/RA specific Additional Terms and Conditions (ATC) if applicable. There is no need for the buyer to include any additional terms and conditions in the contract.

#### **5.2.4.8 GeM Service levels**

As an online system for procurement, GeM service levels aim at maximum efficiency in its operations from placing a demand to closing with payments on time for contracts fulfilled. Each of the steps across transactions have specified time for performance by both sellers and buyers. GeM SPV shall take all appropriate measures to ensure that both buyers and sellers adhere to these terms and conditions. These measures shall include Ratings (parameters), issuing notices, watch list and defaulters being disabled.

#### **5.2.5 Other Actionables for Buyers**

##### **5.2.5.1 Uploading of Annual Procurement Plan**

Rule 149 (vi) of the GFR 2017 states “The Ministries/Departments shall work out their procurement requirements of Goods and Services on either OPEX model or CAPEX model as per their requirement/suitability at the time of preparation of Budget Estimates (BE) and shall project

their Annual Procurement Plan of goods and services on GeM portal within 30 days of Budget approval.”

i. Thus, in line with the GFR mandate, all buyers must provide a projection of their annual demands in the format prescribed by GeM indicating required goods/services along with the specification, quality, quantity, consignee location and time of requirement etc. at the beginning of the financial year. The buyer will have the flexibility to continuously update the plan.

ii. The information will be used by GeM for predictive assessment and to allow effective demand forecasting and planning. This will help sellers plan better and in turn ensure availability of required products/services and lower prices for the buyer. Removal of Difficulty  
Any difficulties experienced during the course of implementation of this notification shall be clarified by the GeM SPV under the Ministry of Commerce through suitable press releases, which shall be kept on public domain.

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### Certificate

It is certified that Gujarat Commerce College is a Government College managed by Commissionerate of Higher Education, Government of Gujarat and college affiliated with the Gujarat University. The principal of this college is Gazetted Class-I officers in Government of Gujarat and hence empowered on behalf of Governing council to sign the all documents including e-Governance report.



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It is certified that Gujarat Commerce College is a Government college and it uses all e-governance tools in administration finance, admission & procurement etc. It is utilizing the Cogent portal for administration and IFMS,PFMS, GEM portal for finance and procurement. Presently GCAS portal is being used for admission. It strictly follows the E-government norms adopted by Government of Gujarat and as updated time to time.



(Dr. Sheela Bhadani)  
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