

Samarth Employee Management System (EMS)

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1. Introduction

This step-by-step manual provides an exhaustive guide for administrators and employees (teaching and non-teaching) to use the Samarth Employee Management System (EMS). The objective is to make on-boarding, data entry, maintenance and reporting tasks simple and reproducible.

2. Quick Start — Login & Roles

Step 1: Open the EMS portal URL provided by your institution in a supported browser (Chrome / Edge / Firefox).

Step 2: Login using your credentials:

1. Enter User ID in the 'Username' field.
2. Enter Password in the 'Password' field.
3. Click 'Login'. If multi-factor authentication (MFA) is enabled, follow the prompts.

Roles available in EMS:

hrprofile-admin — Full administrative rights for Employee module — add/update/export employee details, change settings.

employee — Employee-level access — view and update own profile data and submit drafts for approval.

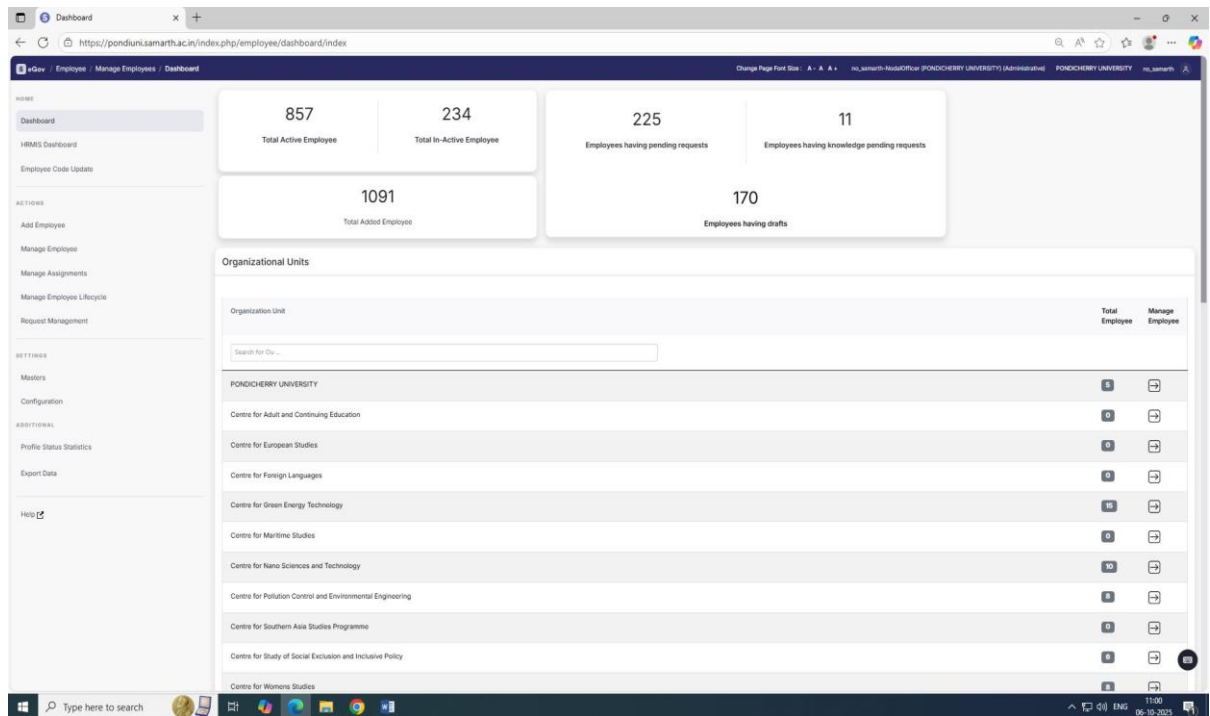
3. Admin Guide

3.1 Dashboard Overview

Purpose: The Dashboard provides a snapshot of employees by department, school, and key metrics.

Steps to access Dashboard:

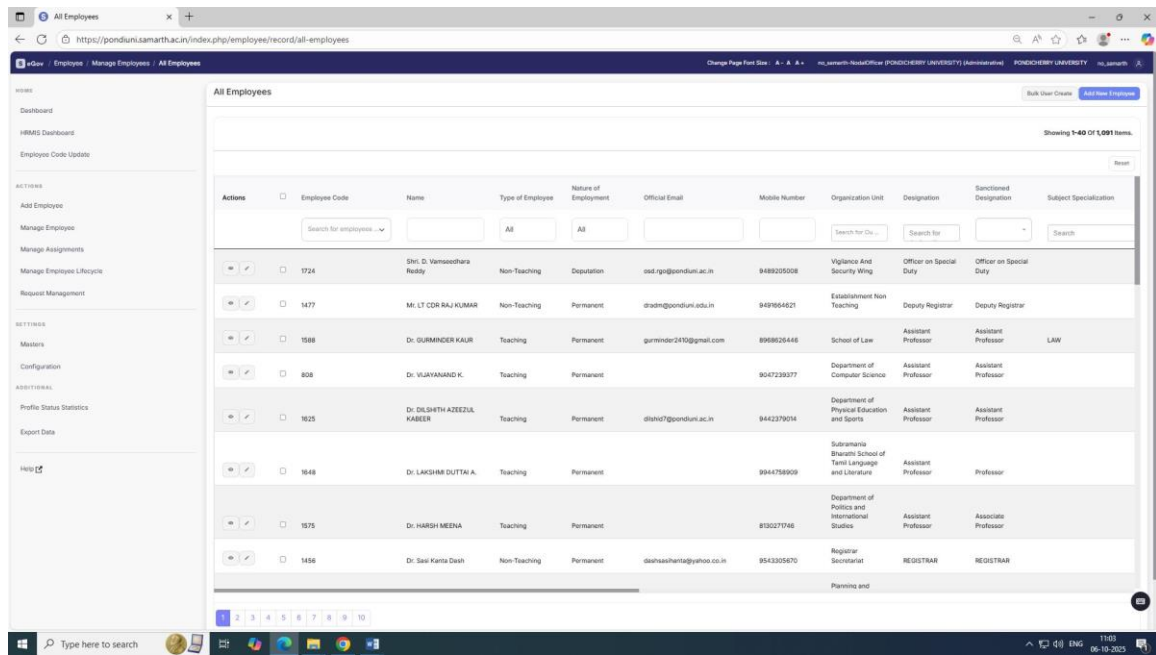
- From the left navigation panel, click 'Dashboard'.
- Observe the summary tiles (Total Employees, Teaching, Non-teaching, Vacancies etc.).
- Click 'View Details' under any tile to open the full Employee list filtered to that metric.



3.2 View Employee List

Steps to view and search employees:

- Click 'Employee' in the left panel → 'Manage Employee' or 'List of Employees'.
- Use filters: Department, Category (Teaching/Non-Teaching), Designation, Employee Code, Name.
- Click the 'Search' or 'Apply' button to filter results.
- For any row, use the action buttons: 'View' (open profile), 'Edit' (modify), or 'Add New Employee'.



3.3 Add New Employee

Use this procedure to add a single employee record via the UI.

Step: Navigate to Employee → Add Employee → Click 'Add New Employee'.

Step: Complete all mandatory fields marked with '*'.

Step: Click 'Save' to create the record; the employee will appear in the employee list.

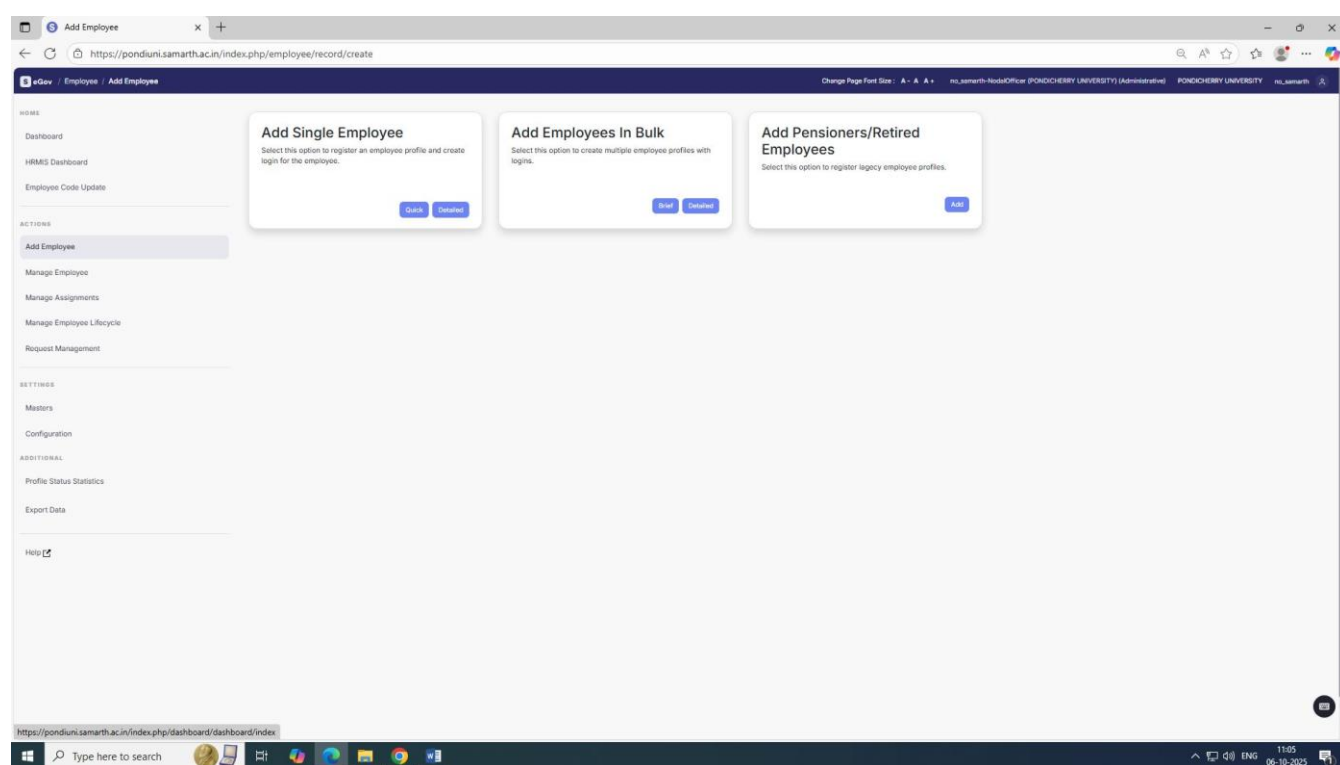
Field descriptions (fill carefully):

Field	Required	Description	Example
Service Cadre	Mandatory	Select 'Teaching' or 'Non-Teaching'.	Teaching
Organization Unit	Mandatory	Select OU (department/faculty). To modify OU list: Settings → Organization Units.	Department of Computer Science
Designation	Mandatory	Select designation mapped to the selected OU. Modify via Settings → Designation.	-
Category	Optional	Employee category code if applicable.	-
Employee Name (English & Hindi)	Mandatory	Enter full name as per official records.	Dr. Anita Sharma
Employee Code	Mandatory	Unique code assigned as per University records (e.g., EMP12345).	EMP2025-001
Nature of Employment	Mandatory	Permanent/Contractual/Deputation/Temporary — configurable via Settings → Nature of Employment.	-

Date of Joining	Mandatory	Enter date in DD-MM-YYYY format.	-
Email	Optional but recommended	Work email used for notifications.	-
Phone	Optional	Contact number (with country code if external).	-
Additional Parameters	Optional	Any institution-specific additional fields set up under Settings → Employee Additional Parameters.	-

Tips:

- Ensure Employee Code is unique before saving. Duplicate codes will cause errors.
- If a field is not visible in the dropdown, check Settings → Master data to add it.



Add Employee Record

Employee Information

Type of Employee *	Select
Nature of Employment *	Select
Appointed Category *	Select
Sanctioned OU *	Select
Sanctioned Designation *	
Organization Unit *	Select
Post *	Select
	Help
Employee Code (Only Allowed A-Z, 0-9, and Special Charecter Like . / - _) *	
Seniority Rank	Enter Seniority Rank
Subject Specialization	Select
Is this employee a teacher ? *	☐ Yes ☐ No
Group (Employee)	Select
Group (Payroll)	Select

Employee Personal Information

Salutation *	Select
First Name *	Enter first name
Middle Name	Enter middle name
Surname	Enter last name
Date of Birth *	Select
Date of Joining *	Select
Date Of Superannuation *	Select
Qualification at the Time of Appointment *	Select
Accomodation Provided by University *	Select
Gender *	Select
Name in Hindi	Enter Name
Blood Group	Select

About Employee

Bio Note

Employee Salary Information

Active Pay Commission

Select

Payband Id

Select

Grade Pay Id

Select

Basic Salary

Ledger No

P.F. Subscription

Select

Bank Information

Bank Name

Select

Branch Name

Bank Account Number

IFSC

Professional/Scholar Profile Links

Research Gate ID

Orcid ID

Google Scholar ID

Vidwan

Employee Status

Select

Employee Status Reason

Remark

Save

Cancel

3.4 Edit Employee Profile

Steps to edit an existing employee profile:

- Go to Employee → List of Employees.
- Search for the employee using name or employee code.
- Click 'Edit' next to the employee record.
- Modify fields as required. Sections available include: Profile, University Assignments, Academic, Career Profile, Research, Patents & Consultancy, Memberships.
- Click 'Save' to commit changes. Major changes may route through approval workflows if configured.

3.5 Upload Photo

Steps to upload or update an employee photo:

- Edit the employee profile and locate the Photo section.
- Click the 'Upload' icon or 'Browse' button.
- Select the image file (recommended: JPG/PNG, max size 200 KB; resolution 300x300 px ideal).
- Click 'Upload' and then 'Save' to attach photo to the profile.

The screenshot shows the 'Service' tab of an employee profile for D. Vamseedhara Reddy. The page is divided into two main sections: 5.1 Employee ID and 5.2 Employment Details.

5.1 Employee ID

Update profile photo

D. Vamseedhara Reddy
Designation: Officer on Special Duty
Wing: Vigilance And Security Wing
Sanctioned DU: PONDICHERY UNIVERSITY
Office Email: vrd.rgo@pondicherry.ac.in
Office Phone: 2654253
Sanctioned Designation: Officer on Special Duty

5.2 Employment Details

Employee Code	1724
Seniority Rank	
Type of Employee	Non-Teaching
Nature of Employment	Deputation
Nature of Post	Not Applicable
Appointed Category	Unreserved
Date of Joining	28-08-2025
Date of Superannuation	30-08-2048
Group (Employee)	
Payroll Status	Active
Employee Profile Status	Active

Buttons: Update Sanctioned Profile, Update, Add Assignment, Update Employee Lifecycle

Assignments: Employee Lifecycle

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The screenshot shows the 'Upload Photo/Sign' page. It contains two main sections: Upload Photo/Sign and Upload Signature.

Upload Photo/Sign

Accepted formats: .png, .jpg, .jpeg (Max File Size is 200KB)

Upload Signature

Accepted formats: .png, .jpg, .jpeg (Max File Size is 200KB)

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3.6 Manage Assignments (change designation/OU)

Purpose: Use 'Manage Assignment' to change an employee's assigned OU or designation (for promotions, transfers, deputation).

- Navigate to Employee → Manage Assignment (or Manage Employee → Update).
- Search and select the employee record.
- Click 'Add Assignment' or 'Update Assignment'.
- Choose 'Reason' (e.g., Assignment/Promotion/Transfer).
- Select the new OU and Designation, specify the effective date, and enter remarks (if any).
- Click 'Save' to publish the change. System will log previous assignment as historical data.

Add Assignment

Reason*	Select
With In Same Institution	☒ within the same institution ☐ outside the parent institution
Organizational Unit*	Select
Assignment*	Select
File Notification Number*	
File Notification Date*	Notification Date
Reports To OU	Select
Reports To Designation	Select
Effective Date*	From * Select Date ☐ Forenoon ☐ Afternoon To Select Date ☐ Forenoon ☐ Afternoon
Status *	Select
Document Upload	Drag & drop files here ... Remove Cancel Upload Browse ...
Remarks	Write Here

Save

Cancel

3.7 Bulk Upload (Step-by-step)

Use bulk upload for adding many employees at once via an Excel template.

1. Go to Employee → Bulk Upload.
2. Click 'Download Template' to fetch the Excel format required by the system.
3. Open the template and fill rows carefully. Do NOT change column headers.
4. Mandatory columns typically include: Employee Code, Name, Service Cadre, OU, Designation, Nature of Employment, Date of Joining.
5. Save the file in .xlsx format.
6. Upload the file via 'Browse' and click 'Submit'.
7. The system validates the data. Review the validation report and fix any errors.
8. Once validation passes, click 'Process' to insert records.

Bulk Upload - Sample Column Specification:

Column Header	Required	Format / Notes
Employee Code	Yes	Unique code - text
Employee Name	Yes	Full name - text
Service Cadre	Yes	Teaching / Non-Teaching
Organization Unit	Yes	Exact OU name as in system
Designation	Yes	Exact Designation as in system
Date of Joining	Yes	DD-MM-YYYY
Email	No	Valid email address

3.8 Export Data

Steps to export employee data from the portal:

- Navigate to Employee → Export Data.
- Click the 'Action' button and select the export menu (CSV/Excel/PDF depending on configuration).
- Choose filters to limit the export if needed (Department, Year of Joining, Category).
- Click 'Export' and download the file from the browser's downloads folder.

Export Menu

Name	Action
Custom Export	↻
Section Wise Data Export	↻
Section Data Column Wise	↻
Employee Wise Data Export	↻
Filter Wise Data Export	↻
Pending Request Export	↻
Employee Lifecycle Data	↻
Retiree List	↻
Group Data Export	↻

Section Data Export

Sections *

Employee Profile

- ☐ Employee ID/Code
- ☐ Seniority Rank
- ☐ Status Reason
- ☐ Salutation
- ☐ First Name
- ☐ Middle Name
- ☐ Surname
- ☐ Name in Hindi
- ☐ Guardian/Father Name
- ☐ Mother Name
- ☐ Marital Status
- ☐ Spouse Name
- ☐ Wedding Date
- ☐ Gender
- ☐ Appointed Category
- ☐ Social Category
- ☐ Belong to PwBD Category
- ☐ Nature of Disability
- ☐ Blood Group
- ☐ Nationality
- ☐ Other Nationality
- ☐ Date of Birth
- ☐ Religion
- ☐ Mobile Number
- ☐ Alternate Mobile No
- ☐ Personal Email
- ☐ Type of Employee
- ☐ Nature of Employment
- ☐ Nature of Post
- ☐ Post Sanction Order No.
- ☐ Post Sanction Authority
- ☐ Post Sanction Date
- ☐ Organization Unit
- ☐ Post
- ☐ Ledger Number
- ☐ Date of Joining
- ☐ Date Of Superannuation
- ☐ Qualification at the Time of Appointment
- ☐ Subject Specialization
- ☐ Official Email
- ☐ Office Phone Number
- ☐ PAN
- ☐ University Doctor
- ☐ Personal Website
- ☐ Official Website
- ☐ Accomodation Provided by University
- ☐ Residential Campus
- ☐ Residential Address
- ☐ Bank Name
- ☐ Branch Name
- ☐ Bank Code
- ☐ Branch Code
- ☐ Residential State
- ☐ Active Pay Commission
- ☐ Payband Id
- ☐ Grade Pay Id
- ☐ Level Id
- ☐ Basic Salary
- ☐ Ledger No
- ☐ Pfms Id
- ☐ P.F. Subscription
- ☐ P.F. Number
- ☐ P.F. Beneficiary
- ☐ P.F. Relation
- ☐ Pf Status
- ☐ Payroll Status
- ☐ Salary Config Status
- ☐ Effective Date Payroll
- ☐ Reason For Change Payroll
- ☐ Login Activated
- ☐ Residential Address Pincode
- ☐ Residential Country
- ☐ Left Thumb Upload
- ☐ Residential City
- ☐ Residential Phone Number
- ☐ Permanent Address
- ☐ Permanent Pincode
- ☐ Permanent Country
- ☐ Permanent State
- ☐ Permanent City
- ☐ Hometown Address
- ☐ Nearest Railway Station
- ☐ Nearest Airport
- ☐ Effective Date Profile
- ☐ Reason For Change Profile
- ☐ Approved
- ☐ Employee Profile Status
- ☐ Bank Account Number
- ☐ Photo Upload
- ☐ Signature Upload
- ☐ IFSC
- ☐ Category Upload
- ☐ PwD Upload
- ☐ ID Proof Upload
- ☐ Remark
- ☐ Hometown Country
- ☐ Hometown State
- ☐ Hometown City
- ☐ Hometown Pincode
- ☐ Driving License
- ☐ Passport Number
- ☐ Passport Validity
- ☐ Emergency Contacts
- ☐ Other Reason
- ☐ Employee Status
- ☐ Employee Status Reason
- ☐ Employee Status Other Reason
- ☐ Verified Remarks
- ☐ Scholar links
- ☐ Income Tax Slab
- ☐ Financial Plan Id
- ☐ Financial Plan
- ☐ University Bank Id
- ☐ University Bank Account
- ☐ University Bank Ifsc
- ☐ University Bank Branch
- ☐ City Category
- ☐ Bio Note
- ☐ Campus
- ☐ Paymatrix Cell
- ☐ Date Of Next Increment
- ☐ Reporting Ou
- ☐ Advance Paid
- ☐ Advance Paid Personal
- ☐ No Of Advance Paid
- ☐ No Of Advance Paid Personal
- ☐ Advance Paid Lcforeign
- ☐ No Of Advance Paid Lcforeign
- ☐ Cpis Id
- ☐ Esic No
- ☐ Other Religion
- ☐ Employment Status
- ☐ Reversed Marital Status
- ☐ Employee Institution Type
- ☐ Institution
- ☐ Relevant Doc
- ☐ Allotment Order No
- ☐ Allotment Authority
- ☐ Allotment Date
- ☐ Groups
- ☐ Group (Employee)
- ☐ Group (Payroll)
- ☐ Position Id
- ☐ Sanctioned OU
- ☐ Sanctioned Designation
- ☐ Payment Scheme
- ☐ Pension Config Status
- ☐ Service Book No
- ☐ Allow Tax Calculation

Export

3.9 HRMIS — Add Sanctioned Designation

- Navigate to Employee → HRMIS Dashboard → Click 'Launch'.
- In HRMIS view, click 'Add' to create a new sanctioned designation entry.
- Fill details: Sanctioned OU, Sanctioned Designation, Grade/Pay Scale, Number of Posts, Effective Date.
- Click 'Submit' to publish the sanctioned designation.

POSITION DETAILS

View/Add Position Details

LAUNCH

Employee Category	Total Sanctioned	Total Recruited	Total Vacant
Non-Teaching	717	382	335
Teaching	502	386	116
Statutory Officers	6	2	4
Academic (Other)	1	0	1
Total	1226	770	456

Permanent

502

Total Teaching Sanctioned Positions

679

Total Non-Teaching Sanctioned Positions

1187

Total Sanctioned

386

Total Teaching Recruited Positions

379

Total Non-Teaching Recruited Positions

767

Total Recruited

116

Total Teaching Vacant Positions

300

Total Non-Teaching Vacant Positions

420

Total Vacant

Contractual

0

Total Teaching Sanctioned Positions

15

Total Non-Teaching Sanctioned Positions

15

Total Sanctioned

0

Total Teaching Recruited Positions

2

Total Non-Teaching Recruited Positions

2

Total Recruited

0

Total Teaching Vacant Positions

13

Total Non-Teaching Vacant Positions

13

Total Vacant

Tenure-Basis

0

Total Teaching Sanctioned Positions

22

Total Non-Teaching Sanctioned Positions

23

Total Sanctioned

0

Total Teaching Recruited Positions

0

Total Non-Teaching Recruited Positions

0

Total Recruited

0

Total Teaching Vacant Positions

22

Total Non-Teaching Vacant Positions

23

Total Vacant

Deputation

0

Total Teaching Sanctioned Positions

1

Total Non-Teaching Sanctioned Positions

1

Total Sanctioned

0

Total Teaching Recruited Positions

1

Total Non-Teaching Recruited Positions

1

Total Recruited

0

Total Teaching Vacant Positions

0

Total Non-Teaching Vacant Positions

0

Total Vacant

Add Position Details

Nature of employment *

Select

Employment Type *

Select

Organizational Unit *

Select

Designation *

Select

Specialization (Optional)

Select

	Positions		
Category	Sanctioned	Filled	Vacant
Unreserved			
OBC			
SC			
ST			
PWD			
EWS			
OTHERS			
Minority			
Total	0	0	0

Date of Sanction *

Date

Sanction/Allotment Order No.

Upload Relevant Order Document

Drag & drop files here ...

Cancel

Publish

Remove

Cancel

Browse ...

3.10 Settings and Masters

Admins should maintain master data which populates dropdown values across the system.

- Go to Settings → Master Data (or 'Master').
- Key masters: Nature of Employment, Disability Options, Organization Units, Designations, Document Options, Social Categories.
- To add an item: Click 'Add', fill the form and 'Save'. The item becomes available in dropdowns.

Masters

#	Name	Action
1	Social Categories	
2	Nature of Employment Options	
3	Disability Options	
4	Document Options	
5	Action Options	
6	Action Options Reason	
7	Separation Event Type	
8	Scholar Profile Links	
9	Additional Parameters	
10	Travel Reasons	
11	Travel Purposes	
12	Subject Specialization	

3.11 Role Assignment & Access Control

- Navigate to Settings → Role Assignment (or Security / User Management).
- Search for the user and assign appropriate role(s) such as 'hrprofile-admin' or 'employee'.
- Save changes. Role changes take effect on next login or immediately depending on configuration.

3.12 Activate / Inactivate Employee

- Go to Settings → Configuration → Employee Status Update.
- Search for the employee record.
- Click 'Update Employee Status' and select 'Inactive' (or 'Active').
- Provide reason and effective date if required, then click 'Submit'.

Employee Status Update ×

You are about to change employee status for all the selected employees, status will be reverted to original on the selected date in this form.

Status*

Remarks*

Please input the date on which the status should revert to the original status.*
 

Name	Designation	Employment Type	Status
amseedhara			
R RAJ KUM			
INDER KAUR	Teaching	Permanent	Active
ANAND K.	Teaching	Permanent	Active

3.13 Employee Code Update

- Navigate to Employee → Employee Code Update.
- Search for employee, enter the new code in 'Updated Code' field.
- Click 'Save' and verify the change in the Employee list.

Update Employee Code

(1724) Shri. D. Vamseedhara Reddy

Search

Clear

Employee Code : 1724

D. Vamseedhara Reddy
Designation:
Officer on Special Duty
Organization Unit :
Vigilance And Security Wing

Office Email:
osd.rgo@pondiuni.ac.in
Office Phone:
2654253

Change Employee Code

3.14 Employee Lifecycle

The Employee Lifecycle tracks key events such as Appointment, Promotion, Re-engagement, Separation.

- Manage events via Employee → Manage Employee → Lifecycle Actions (Appointment/Promotion/Separation).
- For each event, enter the effective date, supporting documents (if any) and remarks.
- Click 'Save' to store lifecycle event.

Add Employee Lifecycle

Event Type *

Reason *

Notification No *

Notification Date *

Effective Date *

Effective Time *

Document Upload

Remarks

Select

Select...

Notification No.

Notification Date

Select Date

☒ Forenoon * ☐ Afternoon *

Choose File No file chosen

Write Here

Save

Cancel

4. Teaching Employee — Profile Update

This section explains how Teaching employees can update their profiles and submit for approval.

Access Profile

- Login with your employee credentials.
- From left panel click 'Employee' → 'Profile' or 'Launch' (under Dashboard).
- Your profile summary appears.

Update Personal Details

- Click 'Edit' on Profile section.
- Update contact details, emergency contact, and personal email if changed.
- Click 'Save Draft' to preserve changes or 'Submit' to send for approval.

Add Academic Qualifications

- Navigate to Academic → Click 'Add' for UG/PG/M.Phil/Ph.D./D.Sc./D.Lit as applicable.
- Fill Institute, Degree, Year of Passing, University, and upload supporting document (if required).
- Click 'Save'. Repeat for multiple degrees.

Add Career Profile

- Go to Career Profile → Add entries like previous employment, administrative experience, industrial experience.
- Provide start/end dates, role, employer and upload supporting documents if available.
- Click 'Save'.

Research Supervision & Publications

- Go to Research Supervision to add PhD awarded/submitted/ongoing details.
- In Research Publication sections add journal articles, conference presentations, workshops attended and organized.
- Provide DOI/ISBN details where available and attach copies of publications or proof.

Patents, Projects & Consultancy

- Add patent details, project title, funding agency, start/end dates and consultancy assignments.
- Attach any certificates or sanction letters.

Memberships & Associations

- Add professional body memberships, roles in societies, and MoU contributions.
- Add mentorship details and E-content contributions.

Submit for Approval

- Once changes are complete, click 'Submit' (if available).
- Your draft will route to HoD for first-level approval and then to Employee Admin for final verification.

Profile Save Options:

- Save Draft — Saves progress locally to your account; can be edited later.
- Submit — Sends for approval to HoD. After HoD approval, it goes to Employee Admin for final verification.

5. Non-Teaching Employee — Profile Update

Non-Teaching employees follow a similar process to Teaching employees but may have fewer research-related sections.

Access Profile

- Login and go to Employee → Profile.
- Click 'Edit' to update personal information.

Academic & Career

- Add UG/PG/M.Phil/Ph.D. (if any) under Academic.
- Add administrative, technical or industrial experience under Career Profile.

Memberships & Professional Development

- Record memberships, trainings, and professional development programs.

Submit for Approval

- Save Draft and Submit to HoD for approval if required.

6. Workflow: Draft → HoD → Admin (Approval Flow)

Overview of approval workflow for profile updates:

1. Employee saves information as Draft.
2. Employee clicks 'Submit' to send the draft to the Head of Department (HoD).
3. HoD reviews and either 'Approves' or 'Requests Changes' with remarks.
4. If approved by HoD, the draft moves to Employee Admin for final verification.
5. Employee Admin verifies and 'Publishes' the data to the live system.

7. Glossary

S. No.	Term	Description	Module/Navigation
1	Employee	The post is teaching, non-teaching, or academic (other).	Employee
2	Employee Category	Specifies whether the employee is Teaching, Non-Teaching, or Administrative staff.	Employee
3	Employee Code	A unique identification number assigned to each employee by the University.	Employee
4	Employee Nature of Employment	Specifies if the employee is on a permanent, contractual, deputation, or temporary basis.	Employee
5	Employee Reporting Designation	The official job title of the person to whom an employee reports, such as Head of Department (HoD) or Dean.	Employee
6	Employee Reporting OU	The department, unit, or section to which an employee reports within the university.	Employee
7	Employee Salary Payment Scheme	Defines the salary structure or pay scale under which the employee is paid.	Employee
8	Employee Sanctioned Designation	The official job title assigned to an employee as per the university's approved structure.	Employee
9	Employee Sanctioned OU	Refers to the department or unit where the employee is officially appointed.	Employee
10	Employee Seniority Rank	Represents the employee's rank based on their years of service and experience.	Employee
11	Employee Subject Specialization	Denotes the specific subject or field in which the employee specializes.	Employee
12	Employee User Profile	Allows employees to manage the visibility of their profile information to others.	Employee
13	HRMIS Dashboard	A central platform where all employee-related data, such as sanctioned positions, recruited employees, and vacancies, are displayed and managed.	Employee
14	Manage Assignment	Allows administrators to assign roles, responsibilities, or additional duties to employees.	Employee

S. No.	Term	Description	Module/Navigation
15	Manage Employee Lifecycle	Helps track and manage an employee's journey from joining to retirement or resignation.	Employee
16	Sanctioned OU	Refers to the department or unit where the employee is officially appointed.	Employee
17	Type of Employee	Defines whether the employee is Teaching, Non-Teaching, or Administrative staff.	Employee