



सत्यमेव जयते



डा. के. जयकुमार, आईएएस  
संयुक्त सचिव

Dr. K. JAYAKUMAR, IAS  
Joint Secretary

वैज्ञानिक तथा औद्योगिक अनुसंधान परिषद्  
अनुसंधान भवन, 2 रफी मार्ग, नई दिल्ली-110001  
COUNCIL OF SCIENTIFIC & INDUSTRIAL RESEARCH  
Anusandhan Bhawan, 2, Rafi Marg, New Delhi-110001

D.O.No.2/70/2009-JS

March 15, 2012

Dear Sir/Madam,

After a long journey of painstaking efforts to compile the requirements, design enterprise solutions and develop the associated software that would be necessary to attempt automation of key processes relating to various operations of CSIR, I am happy to apprise you that the consultant agencies have completed the development of ERP applications modules and have tested these modules for their seamless integration and interoperability across modules. I am pleased to inform you that 15,720 of our CSIR employees have generated their unique Employee IDs which they can now use to perform online operations. Many of the Labs have also progressed significantly with regard to the entry of service details in the e-service books.

2. I am sure that the Hand book/Reference Compendium on the ESS and Finance Modules that were sent earlier have been widely circulated amongst the staff members. The Reference Handbooks and the Manuals for the other modules have also been finalised and are being sent as soft copies by emails, by end March 2012, as also in the form of hardcopy printed hand books for the users before the end of April 2012. They will also uploaded in the CSIR website in the PMO portal being developed in house.

3. As a next progressive step, it would be necessary to allocate the links associated with various processes to each of the employees in CSIR, in keeping with the roles that they perform and their responsibility areas. This would be accomplished in the following manner:

- (i) The mapping of predefined roles to individual employees can be performed in the HR portal with the features presented to the PME/ Business Development Heads under the link <http://erp.csir.res.in/hrdp> by following the steps under the link *setup*, which when clicked reveals two other links *Role wise setup* and *Employee wise set up*, either of which could be used to perform this mapping. This is a significant step in terms of its implications – as access privileges for performing various tasks are granted to the employees on the basis of this mapping. Hence, this mapping can only be performed by the PME/Business Development Heads, who in turn can direct this mapping to be performed with the help of other persons whom they may associate to perform this mapping.
- (ii) Since all operations in CSIR are carried out in a project mode, all the employees are also mapped to a project. These projects are created under the R&D Portal and

- (iii) employees mapped to such projects. Notional projects have also been created for administrative personnel and for activities such as infrastructure development, generic facilities management and works.
- (iv) There are also additional provisions in the configuration module within each of the ERP modules to customize and provide for accommodating lab specific variations to the default role definitions, which authenticate and provides access privileges for performing various process steps (activities) under a given process.

4. The soft copy of the manuals/ instructions for performing the relevant steps relating to these customization of role mapping are **enclosed** for your reference with this mail along with the detailed list of all Roles and all Processes which have been automated. The list of all integration points defining the interfaces for exchange of information across the six ERP modules are also available and would be sent to you, for your information. The ERP modules have been tested for their interoperability and the user will experience a seamless integration, avoiding the need for multiple data entry at various stages and across modules.

5. Once the role mapping is completed, a given employee can see the relevant generic links associated with his/her responsibility areas, when he/she logs on to the system using his/her employee ID (previously referred to as Unique ID). He would also receive on his/her '*in tray*' relevant items of work entrusted to him or passed on by 'others' in the workflow, on which he is required to act.

6. As a pre-requisite to enable the operations to go online, one other significant step is to populate the required tables with the *initial data set*. For example, (i) Data entry for the Opening balance in the prescribed formats required for the finance and accounts related operations during the beginning of the year 2012-13, (ii) Entry of the master data for the item category, item sub category, specifications in respect of items being procured regularly, vendor data etc in the procurement module and (iii) Project related data entry in the R&D portal. The necessary instructions to Senior Finance and Accounts Cadre Officers and Senior Stores and Purchase Officers in the Labs for action under (i) and (ii) above, has already been issued by the Project Leader Dr. G.Radhakrishnan. Scientists in PME/BD would be engaged over the next month or so, to familiarize them with the manner in which project data would be entered in the R&D Portal. In this context, it may kindly be noted that, it would be necessary to extend the contract of the Data Entry Operators who have been engaged under the ICT Transformation Project in various labs, to ensure that they are available for the entry of the initial data sets, on the basis of instructions from the Lab Level implementation teams who function in collaboration with the BD-PME Heads.

7. At this point in time, some of the significant steps that have been taken to facilitate the implementation of ERP applications are as follows;

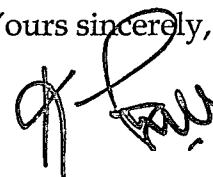
- (i) A Centralized Help Desk will start functioning from the third week of April to explain and facilitate the sequence of roll out, as also to provide clarifications with respect to various aspects of implementation. Efforts have already been initiated to have an exclusive toll free number which will be examined shortly.
- (ii) A Project Management Portal has been developed as a complement to the Help Desk support services which will enable lodging of issues and tracking such issues to facilitate their resolution.
- (iii) Teams of technical support personnel from the HQ, as also from Consultancy Development Centre would visit the Labs starting from mid-April and help in the configuration of the application and enable users commence their operations online.

Necessary training will also be provided by these technical support teams, to the Lab level implementation teams that have already been constituted.

7. Commensurate with the rigorous efforts that had gone in over the last two years, we may need to be persistent in our efforts over the next 12 months in this new financial year 2012-13, to transition to the online operations. I would like to complement the efforts of all our Scientists, Technical and Administrative personnel for supporting in architecting this landmark ICT Transformation Initiative and would appeal to their continued support in completing the e-Mission that we have started. In keeping with all commendable and noteworthy achievements, this transition will get accomplished progressively in small steady steps, as we savour, consolidate and reinforce the beneficial outcomes that we experience in the process of taking forward the implementation progressively.

With warm regards and best wishes,

Yours sincerely,



(K. Jayakumar)

1. All PME/Business Development Heads, CoAs/ AOs of National Labs. Instts of CSIR
2. All Directors of National Labs. Instts of CSIR
3. All HODs at CSIR Hqrs./CSIR Complex,/URDIP/IPU / DG, CDC
4. Chairman, ICT Project
5. Project Leader, ICT Project
6. US to DGCSIR
7. Office copy

Encl:aa

## List of Roles

Employee	FAO/DDO (Bill/Cash)
DA(General)	Diarist (Audit)
SO(General)	Dealing Assistant- Payment (Audit)
US	Dealing Assistant- Receipt (Audit)
Appointing Officer	Section Officer (Audit)
COA	Finance & Accounts Officer (Audit)
Director	Cheque Writer
Vigilance	Cashier
T&D Support (Corporate)	Controller of Finance & Account
T&D Head (Corporate)	Deputy Finance Advisor
JS	Finance Advisor
SO(Recruitment)	Director General
SO(Assessment)	PA Sr. Deputy Finance Advisor
SO(Vigilance)	Diarist (Budget)
SO(Bill)	Dealing Assistant (Budget)
DA(Recruitment)	Section Officer (Budget)
DA(Assessment)	Finance & Accounts Officer (Budget)
DA(Vigilance)	Diarist (Pension)
DA(Bill)	Dealing Assistant (Pension)
Scientist	Section Officer (Pension)
PME Head	Finance & Account Officer (Pension)
Head of Division at lab	AO
PPD Head	SO (HQ)
BD Head at lab	US (HQ)
DG CSIR	DS
Nodal Scientist at Lab	SDS (HQ)
Nodal Scientist HQ in ppd	JSA
Nodal Scientist ISTAD	Work Head
Technical Officer ISTAD	WC
Section Officer ISTAD	F & A
Dealing Assistant ISTAD	DG
Dealing Assistant ISTAG	GB
IPMD Head	EAPEx
ISTAD Head	MC
USD Head	SE
Training Administrator	Service Incharge
Trainer	Director EC
Expert	Cabinet
Diarist (Bill/Cash)	Purchase DA
Dealing Assistant- (Bill/Cash)	AE
SO (Bill/Cash)	EE
	JE
	SPO

Stores DA	Standing Finance committee convener
SO Purchase	Expenditure Finance committee convener
Guest House Incharge	High Power committee convener
Guest House Care Taker	Patent evaluation committee convener
GuestHouse Manager	Review committee convener
Technicians	Mobility Of Scientist committee convener
SO Store	ETBD Consultant committee convener
Security Officer	Award High level Screening committee convener
Driver	Award Initial Screening committee convener
Canteen Incharge	Head IT
Meeting Incharge	Head Electrical
Transport Incharge	Head Instrumentation
Group Head at lab in ppd	Head Engineering Services
SO(Establishment)	Receptionist
DA(Establishment)	Head Lab Supervisor
Super	
RnDAdmin	
Finance and Account Officer (Accounts)	
Section Officer (Accounts)	
Dealing Assistant (Accounts)	
Admin-Purchase	
Admin-Engineer	
Admin-Facility	
Admin-stores	
Management Council convener	
HRM Head at lab	
ISTAG Head	
Joint Advisor	
Legal	
APDivisionHQ	
VP CSIR	
Section Officer ISTAG	
HRDG Head	
ITD Head	
HRDC Head	
RAB Head	
ISTAD SCIENTIST	
IP_Cordinator	
Convener	
Cluster Director	
Supervisors	
Learner	
Research Council committee convener	
Management Council committee convener	

## HR Portal Process List

Employee Self Services	
	GPF
	Children Education
	Telephone Reimbursement
	Leaves
	Annual Property Return
	Prior Property Intimation
	No Objection Certificates
	LTC
	Professional Update Allowance
	Medical Reimbursement
	Small Family Allowance
	House Building Advance
	TA
	Staff Quarter Allotment
	Transport Allowance
	Dearness Allowance
	House Rent Allowance
	Festival Advances
	Computer Advance
	Coveyance Loan
	Warm Clothing Advance
	Natural Calamity Advance
	Income Tax Declaration
HR Processes	
	Activity Allocation
	Roster Management
	Superannuation
	Transfer
	Departmental Promotion Committee
	Departmental Test Quota
	Recruitment - Technical Staff
	Recruitment - Permanent Staff
	PayBill
	DA
	Remittance
	Mentoring And Coaching
	Training and Development
	Assessment - Scientist
	Assessment - Technical
	PMS - Admin
	PMS - Scientist

	PMS - Technical
Service Book	
	Service Book
	Request Changes in service book

## Finance & Accounting Process List

CEA/Tution Fee
Telephone Bill Reimbursement
Telephone Bill Office
GPF Withdrawal
GPF Advance
HBA Loan
Personal Computer Loan
CAR/Vehicle Loan
FAN Loan
Food Grain Loan
Flood Loan
Warm Cloth Loan
Festival Loan
Vendor Advance Bill Payment
FDR/Letter of Credit Opening
FDR/Letter of Credit Debit Advice
FDR/Letter of Credit Credit Advice
FDR/Letter_of_Credit_Other_Payment Bill
FDR/Letter_of_Credit_Final_Adjustment_Bill
Vendor Adjustment/Claim Bill Payment
Revolving/Petty Cash Advance Payment
LTC Advance
LTC Adjustment/Claim
TA/DA Advance
TA/DA Adjustment/Claim
Medical Advance
Medical Adjustment/Claim
Water/Electricity Bill
Cashier Receipt
Cashier Payments (Acquittance Roll)
Cashier Imprest Payments
TA/DA Bill Payment by Cashier
Centralised Receipt Module
EMD/SD Receipt
EMD/SD Payment
Honorarium Payment
Spoilt Cheque Re-print
Reverse Voucher
Fund Transfer To Labs
Bank Reconciliation
EMI Sheet
Entry Of Purchase Bill

TDS Certificate Generation
Service Tax Adjustment (Cenvat Credit)
Role based DashBoards
Any Other General Payment Bill
Journal Voucher
Purchase Voucher
Leave Encashment
Investments Bill
Revolving/Petty Cash Adjustment Bill
Revolving/Petty Cash Final Adjustment Bill
PF Trust Accounts
Deputation Case Pension Bill
Work & Services-Running Bill
Work & Services -Advance Bill
Work & Services -Final Bill
ECF Advance
ECF Adjustment/Claim
ECF Installment Receipt
Bonus Payment
Fund Receipt By Lab
<b>Payroll</b>
Salary Pay Bill
Salary Pay slip Generation
Remittance Inside CSIR
Remittance Outside CSIR
DA Arrear
Pay Arrear
Over Time Allowance
RGISP Remittece
Generate Last Pay Certificate
Payroll Close
<b>Admin/Configuration</b>
Config Module
Escalation of Bill
User and Role Management
Work Flow Mangement
<b>Pension</b>
Superannuation Pension (Comutation and Gratuity)
Family Pension (Gratuity) Bill
Retirement Pension
Invalid Pension
Compensate Pension
Compulsary Retirement
Compensate Allowance
Monthly Pension Bills
DA Arrear Pension
Pension Arrear
Bank Scroll In Pension
<b>Budgeting</b>
Lab Budget Preparation DA Process



Lab Budget Approval SO Process
Lab Budget Approval FAO Process
Lab Budget Approval COFA Process
Lab Budget Approval DIRECTOR Process
Lab Budget Review Process at HQ for Refer to Sr. Deputy FA
Lab Budget Approval Process and Send to BS at HQ
Lab Budget Review & Mark to DA by Diarist at HQ
Lab Budget Review & Approval Process by DA at HQ
Lab Budget Review & Approval Process by SO at HQ
Lab Budget Review & Approval Process by FAO at HQ
<b>Funding</b>
HQ Allocation
Lab Allocation

## R&D Portal, Lab Admin, Policy & Programme & eLearning Process Lists

Lab Admin	QHF (Quick Hire Fellow)
	Retention of Lien
	VIP reference
	VRS for Scientist
	CE Rule 10
	CE Rule 12
	Compassionate
	Transfer of Scientist
	CSIR welfare scheme
	RC & MC comments
	Waiver of penal license fee
	Incentive for acquiring higher education
	parliamentary question
	Representation
	Clarification
	Grievance
	UPC
	Adhoc appointment extension
	Casual Labour
Policy Division	Creation
	Amendment
	Clarification
	policy Repository Portal
	Policy Upload Process
	Service extension of Scientist G and above
	Tenure extension of Lab Directors
	Appointment of STIO

	Appointment of Consultants
Legal Division	Repository of cases
Policy Division	RTI request
	1st appeal
	2nd appeal
PPD	Committee and Meeting
	Meeting scheduling
	MOM circulation and status tracking
CSIR	e-Dak and e-File
HRD	SSB
	YSR
Vigilance	Complaints
Planning	Planned Projects
	Five Year Plan
	Annual Plan
	Outcome Budget
	Annual Report
	Half Yearly Performance Report
	Demand for Grants
	Mid Term Appraisal
	Fund Allocation
Business Development	Knowledge Alliance
	Knowledge Base Generation
	Knowledge Base Licensing
	IP Licensing
	Sponsored Projects
	Technical Services
	Grant in Aid
	Consultancy Project
	Collaborative Project
	Professional Development Fund
	Scheme for setting up incubation centers in CSIR laboratories
	Scheme for mobility of scientists/technologists/engineers from CSIR to industry/ R&D institutions and vice versa
	Awards
	Exploitation of Knowledge Base
	Establishing Business and Marketing Entities
	CSIR Staff to be Members of Board of Directors of Private Companies
	Setting Special Purpose Vehicle

	New UI / Prospect Screen
	Patents
	Research Papers
	NIMTLI
	Selling of IPR
	International Collaborative
	Testing Project
	Technology ShowCase
ISTAD	Deputation Fellowship
	Conference Participation
	Lab Holding Conference
	Senior Foreign Scientists
	Distinguished Foreign Scientists
	Travel Grant
	Deputation Report
	Foreign Visits of Directors
	Visit under Bilateral S&T
	IFDC
	Overseas Training
	Partial Travel Grant for External User
USD	Unit for Science Dissemination
Training Division	Employee Dashboard
	View Team Progression
	Classroom Training
	Self Learning Courses
	Training Proposal Workflow
	Registration Workflow
	Online Tests
	Knowledge Repository
	Cmail
	Webinar
	Lab Management
	User Management

## Materials Management

Request For Purchase	Raise an Indent/ Request for Purchase
----------------------	---------------------------------------

	Approval of the Indent
	PME fund allocation
	Committee Approval
	Assign Purchase Dealing Assistant and SO Purchase
	Tender(NIT) Creation
	NIT Approval
	Quotation Opening
	Quotation Opening Approval
	Performance Criteria
	Performance Criteria Approval
	Technical Comparative
	Technical Comparative Approval
	Financial Comparative
	Financial Comparative Approval
	Recommendation
	Recommendation Approval
	Purchase Proposal
	Purchase Proposal Approval
	Negotiation Required then creation of Purchase Proposal
	Purchase Proposal Approval
	PME fund allocation updation and approval
	Purchase Order
	Purchase Order Approval
	Order Acceptance
	Order Acceptance Approval
Pre – Indent Flow for New Proposal	New Proposal Submission
	New Proposal Approval
	EOI Creation
	EOI Approval
	Finalization of Scope
	Approval of Finalized Scope
Master Screens for the following	Add Item
	Add Item Category
	Add Item Sub Category
	Add Item Specifications
	Add Measuring Unit
	Add Sub Category Wise Measuring Unit
	Vendor Registration
	Add Rate Contract Details

	Add LPC Committee Details
	Add Embassy Details
	Add Country/State/City
	Add Airport
	Add Vendor
	Add Forwarding Agent
	Add Insurance company
	Add Transport Service Provider
	Add Clearing Agent
	Add Terms and Conditions
	Add Tax/Discounts/Additional Charges
	Merging of Indents

## Stores

Store Receipt Voucher	Order is received at store by SO stores and a voucher number gets generated. Quantity dispatched and quantity received are entered by him by manual inspection.
	Voucher will go to (Inspector). After manual inspection items are accepted/ rejected by him
	Request will go to Asstt. S & P/Custody for approval
	Request will go to sale/purchase officer for approval
Stores Issue Voucher	Item request is raised by scientist/ requester to store. Quantity indented is mentioned in the request.
	Request will go to Project leader for approval
	Request will go to sale/purchase officer for approval
	Request reaches inbox of SPA. He issues the item to the requester.
	Request come to indenter for verification ie: how much quantity is issued to the him
	Request will go to sale/purchase officer for final approval

Stores Return Voucher	Item can be returned to stores by department/ individual(Scientist). Quantity returned is mentioned in the request
	Return request goes to project leader for approval
	Request goes to sale/purchase officer for approval
	Request goes to SPA, he enters the actual quantity received
	Request goes to indendor for verification
	Request comes to sale/purchase officer for final approval
Stores Transfer Voucher	Item can be transferred from any store,department or individual to any other store, department or individual. Quantity to be transferred is also mentioned in the request
	Transfer request goes to project leader for approval
	Request goes to SPA(Transferee) for approval
	Request will go to Project leader for approval
	Request goes to store assistant for approval
	Request comes to sale/purchase officer for final approval
Loss Statement Voucher	Loss Statement Voucher is raised by store keeper. Quantity of item lost is mentioned by him along with the reason of loss and type of item lost (Consumable/Nonconsumable)
	Loss statement request goes to project leader for approval
	Request goes to SPA for approval
Physical Stock Verification	Adjustment Voucher can be generated for adjusting the consumable item. If there is mismatch in store record and actual item present in store than Adjustment Voucher is generated.

	Request comes to sale/purchase officer for approval
Scrap Declaration Voucher	This voucher is generated for the old, discarded, or rejected non-consumable items. Quantity to be scrapped should also be mentioned in the request.
	Request will go to Project leader for approval
	Request goes to SPA for approval
Stores Gate Pass	Gate pass is issued to items which are going out of the store. Items could be returnable(return after repair) or non returnable(scrap). Quantity of item going out along with the return date in case of returnable item is mentioned in the gate pass.
	Gate pass goes to security officer for approval
Clearance Register	Entry in goods clearance register

## Engineering Works & Estate Management

Below 1 Cr with Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Preliminary Estimate
	Work Committee Recommendation
	Administrative Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical & Expenditure Sanction
Below 1 Cr without Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical & Expenditure Sanction
Works Between 1 crore and 2.5 Crore with Preliminary Estimate	Raise Project Proposal

	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Preliminary Estimate
	Work Committee Recommendation
	Director EC Recommendation
	Admin Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical & Expenditure Sanction
Works Between 1 crore and 2.5 Crore without Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical & Expenditure Sanction
Works Between 2.5 crore and 25 Crore with Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Preliminary Estimate
	Work Committee Recommendation
	Management Council Recommendation
	EAPEx Recommendation
	Admin Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical Recommendation
	Technical & Expenditure Sanction
Works Between 2.5 crore and 25 Crore without Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical Recommendation
	Technical & Expenditure Sanction



Works above 25 Crore with Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Preliminary Estimate
	Work Committee Recommendation
	Management Council Recommendation
	EAPEx Recommendation
	Admin Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical Sanction
	Technical & Expenditure Sanction
Works above 25 Crore without Preliminary Estimate	Raise Project Proposal
	Incharge/HOD Approval
	Work Committee Recommendation
	In Principle Approval
	Detailed Estimate
	Work Committee Recommendation
	Technical Sanction
	Technical & Expenditure Sanction
NIT Approval	NIT Creation
	Approval By Engineer
	Approval By Director
BILL Approval	Bill Submission
	Work Section Approval
	Finance & Accordance
Deviations Approval	Submission
	Approval By Chief Engineer
	Finance & Accordance
Register Dismantled	Submission of Hindrance Request
	Verification

## Facilities Management

Request for Service	Raise a Request
	Approval of the raised request

	Assign resource and spare parts
	Execution by resource (technician) for the requested service
	Closing of the Request
	Costing of the Jobcard
Booking of Transport	Raise a Request
	Approval of Transport Request
	Execution
	Closing the request and Claim Overdue
Maintenance of Transport	Transport Maintenance Work's Entry
	Upload bill
	Approval of the Amount for the Maintenance work executed
Booking of Meeting Room	Raise a Request
	Execution
Booking for Canteen Services	Raise a Request
	Approval of the raised request for the canteen service
	Execution
Guesthouse Room Booking	Raise a Request
	Approval of the raised request for the guesthouse room booking
	Execution