

## **CMIS USER MANUAL FOR CENTRE**

### **Master:**

#### **Account Group:**

In this section create Account Group E.g. Centre Expenses A/c. This group will be parent group of all account. Account Group may have either expense nature or income nature. One Account group can have multiple Account Sub Group.

#### **Account Sub Group:**

In this section create Account Sub Group. E.g. MKCL A/C. All Account Sub Group will be categorized by Account Group. One Account Sub Group may have multiple Accounts.

#### **Account:**

In this section create Account E.g. MS-CIT A/C. This Account will be categorized by Account Sub Group. This Account is belongs to Account Sub Group.

#### **Centre:**

In this section centre details can be entered, E.g. Maharashtra Info soft Technology Institute. Then enter its short name. E.g. MITC. The Short name entered in this section will be used in creating Hall Tickets, Identity Card etc.

#### **Course Module:**

In this section Course Modules & its duration (days) can be entered. E.g. CorelDraw, PageMaker, Photoshop.

#### **Course:**

In this section course details can be entered. Course short Name, Course Duration, Course Contents, Course starting date and Course Fees etc. All courses running by the Centre will be added here.

#### **Designation:**

In this section designation like Faculty/ Teacher, Centre – Coordinator etc can be entered. If the designation type is Faculty/Teacher click the “Faculty Designation box”.

#### **Employee:**

In this section employee details can be entered. Once employee resigns from Centre resigning date can be enter.

#### **Salary Details:**

In this section employee salary break up details can be entered. These details will be useful while printing monthly salary slip.

#### **Material / Stationary:**

In this section Material / Stationary can be entered. (i.e. Opening Stock)

### **Batches:**

In this section Batch Timing can be entered. This will be used in Batch Scheduling. Batch Time, all systems available at that batch time, maximum students seating capacity etc can be entered. E.g. 7pm - 8pm, 20 Student etc.

### **Question Paper:**

In this section enter question paper name, no. of questions to be asked in examination, total marks of examination, time duration of examination in minutes, minimum passing marks of examination. Select module of question bank & enter no. of question of that module & click on "Add". You can give weightage to the particular module.

### **Question Bank:**

In this section select course module of question bank. Add new question to question bank by click on "Add Row button".

### **Education:**

In this section education like M. A., B. Com., B. Sc., B.A. etc can be entered.

### **Tax:**

In this section Taxation rate can be entered or Taxation can be enabled or disabled. Select "Yes" to apply the Tax in "Receipt – Transaction" & select "No" to disable Tax. Change percentage to enter the current "Tax Rate".

### **Fees Type:**

Enter fees type like Course Fees, Exam Fees and Registration Fees etc.

### **Enquiry Source:**

Enter source of enquiry like Cable advertising, News paper, Friend Reference etc. This will be used in Enquiry form.

### **Exam Schedule:**

In this section Examination can be scheduled. Select exam date from Calendar. Enter examination notes if any. Examination can be held on selected date.

### **Caste/Quota:**

Enter caste/Quota like OBC, NT, Open etc. This will be used in Enquiry form.

## **Transaction:**

### **Enquiry:**

In this form enter student personal details, contact details, education details. Select enquiry course from list of courses. After enquiry course select duration course fees & course contents will be from course master. Then click on "Add" button to add course to enquiry course list. Select source of this enquiry from enquiry source list. Enter student remark for further follow up. Click save button to add or update this record. Find out this record by search criteria Enquiry date, name or source. Click delete button to delete this record.

### **Admission:**

Press F2 here to select Enquiry for admission. Select student admission course from admission course(s) list. Course fees will come automatically from “Course Master” & other fees amount need to be entered. Enter discount percentage if any on fees. Select batch timing from list if you want to schedule batch or you can schedule batch later in batch schedule transaction screen. If seat is available in selected batch “Seat Available” message will reflect on screen otherwise “seat not available” message will display on screen. If any student has a requirement of job then select “Yes” from “Job Require” if not then selects “No”. Click on save button to update this record. Find out this record by search criteria “Admission Date or Name”. Click “Delete” to delete this record.

### **Fees Receipt:**

Press “F2” to select student from admission list. Enter student initial character to search student from admission list. Double click on record or click “OK” button. Enter fees received amount against the fees type. Click on save button to update this record. Find out this record by search criteria “Receipt “. Click on “Print” for the print of receipt. Click on delete to delete this record.

### **Batch Schedule:**

In this you can schedule batch from either “Admission” screen or from this screen. Select batch timing & available faculty. Enter “Batch Name”. Select days from “Schedule” – on which day’s batch have been scheduled. Select “Course”. Press “F2” to select student from admission list. Click on “Add to this Batch” button to include student your selected batch. Select student & click on “Remove Student” button to exclude student whose batch completed. For assign Batch to new faculty select faculty from “Assign Batch to New Faculty”. Click on save button to update this record. Find put this record by search criteria “Batches”. Click on delete to delete this record.

### **Hall Ticket:**

#### **Single Hall Ticket Task:**

Press “F2” to select student from admission list who wants to appear forthcoming examinations. Select course from admission course list. Hall ticket number will automatically generate based on course short name. Enter exam time. Click on save button to update this record. Find out this record by search criteria “Hall Ticket”. Click on delete to delete this record.

#### **Bulk Hall Ticket Task:**

In this form select name of Examination, Select Question paper and set the Exam Time. Select Student for creating bulk hall ticket and Click on save button to update this record.

### **Voucher:**

Select employee from employee list who received voucher amount against selected account head. Select account head from account list against which voucher amount being paid. Enter

narration for this transaction. Click on save button to update this record. Find out this record by search criteria “Voucher”. Click on delete to delete this record.

### **Other Income:**

Select employee from employee list who received income amount against selected account head. Select account head from account list against which income amount being paid. Enter narration for this transaction. Click on save button to update this record. Find out this record by search criteria “Other Income”. Click on delete button to delete this record.

### **Material Issue:**

Select Material /Stationary from material list which will be issue to the student. After material selection available quantity to selected student material /stationary will be display. Press “F2” for select student from list. Only those student will available for selection to whom your selected material not yet issued. Search student by name of initial & double click on selected student or search by criteria “Material Issue”. Click on save to update this record & click on delete to delete this record.

### **Material Purchase:**

Select material / stationary from material list which are purchased. Enter supplier name, quantity. Click on save button to update this record. Find out by search criteria “Material Purchase”. Click on delete to delete this record.

### **Enquiry Follow-Up:**

This module is for tracking enquiries. Enquiry Follow-up form will display current date due follow-up and Pending Follow-up. After calling to enquiry for follow-up click on appropriate record and fill new remarks in right bottom panel.

### **Employee Attendance:**

In this form we can enter attendance of each Employee. To do this select attendance date mark them absent or present and save the form.

### **Student Attendance:**

In this form we can enter attendance of each batch students. To do this select attendance date and click on “Load button” and mark them absent or present and save the form. Filter student details faculty wise.

### **Placement:**

In this form we can maintain records of placement which we offered to student. For that case we have to select date of Joining of company, select student, select company name, and enter Salary Package and save it.

## **Reports:**

### **Enquiry Report:**

#### **i) Address Report:**

Filter enquiry address report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc.

**ii) Birthday Report:**

Filter enquiry birthday report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc.

**iii) Remark Report:**

Filter enquiry remark report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc.

**iv) Enquiry Analysis Report:**

**a) Enquiry Course Report:**

Filter enquiry course report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc. In this report will show you by graphically. Below the graph will show you all details of this report.

**b) Enquiry source Report:**

Filter enquiry source report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc. In this report will show you by graphically. Below the graph will show you all details of this report.

**v) Follow-Up History Report:**

Filter follow-up history report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise, follow up required etc. In this report will show you date wise remark of student.

**Admission Report:**

**i) Address Report:**

Filter enquiry address report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc. You can't make any changes in reports.

**ii) Birthday Report:**

Filter admission birthday report by selecting filter criteria i.e. date range, course wise etc.

**iii) Admission Analysis Report:**

**a) Admission Enquiry Report:**

Filter admission enquiry report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc. You can't make any changes in reports.

**b) Admission Course Report:**

Filter admission course report by selecting filter criteria i.e. date range, all enquiries, non admission enquiries, course wise etc. You can't make any changes in reports.

#### **iv) HR Report:**

Filter HR report by selecting filter criteria i.e. status, course, student wise etc. You can't make any changes in reports.

### **Employee Reports:**

#### **i) Employee Personal Report:**

Filter employee reports by selecting filter criteria i.e. Designation, Existing Employee, X Employee, All Employee etc.

#### **ii) Salary Break Up Report:**

Filter salary report by selecting filter criteria i.e. Designation, Existing Employee, X Employee, All Employee etc.

#### **iii) Salary Slip Report:**

Filter salary report by selecting filter criteria i.e. Designation, Existing Employee, X Employee, All Employee etc.

#### **iv) Staff Attendance Report:**

Filter Employee attendance report by selecting filter criteria i.e. Attendance date, Employee Name, Designation etc.

#### **V) Staff Performance Report:**

Filter Staff Performance report by selecting filter criteria i.e. Employee Name, Student, Course, either Enquiry wise or Admission wise etc.

### **Batch Schedule Report:**

#### **i) Pending Batch Schedule:**

Filter pending batch schedule report by selecting filter criteria i.e. Admission from date.

#### **ii) Batch Report:**

Filter batch report by selecting filter criteria i.e. batches, faculty etc, select view type i.e. list view or details view. Then report will display.

### **Collection Report:**

#### **i) Fees Receivable Report:**

Filter fees receivable report by selecting filter criteria i.e. invoice wise, student wise, Batch wise etc, this report will show the current receivable fees amount of student.

#### **ii) Fees Received Report:**

Filter fees received report by selecting filter criteria i.e. date range, invoice wise, student wise, received by employee wise etc. This report will show collection fees amount of student.

#### **iii) Installment Receivable Report:**

Filter installment receivable report by selecting filter criteria i.e. date range, invoice wise, student wise, Course wise, Batch wise etc , this report will show the current receivable fees amount of student.

#### **iv) Fees History Report:**

Filter fees history report by selection filter criteria i.e. admission date range, invoice wise, student wise, course wise, batch wise etc. This report will show the current receivable fees & collection fees amount of student.

### **Financial Report:**

#### **i) Account Group Report:**

Filter account group report by selecting filter criteria i.e. date range of voucher date or income receipt date.

#### **ii) Account Sub Group Report:**

Filter account group report by selecting filter criteria i.e. date range of voucher date or income receipt date.

#### **iii) Account Report:**

Filter account group report by selecting filter criteria i.e. date range of voucher date or income receipt date.

### **Course Report:**

Filter course report by selecting filter criteria i.e. all courses or course etc. Select view type list view or details view. After that report will display.

### **Material Report:**

#### **i) Material Stock Report:**

Filter material stock report by selecting filter criteria i.e. all material or material wise. Then click on “Display Report”, report will display.

#### **ii) Material Issue Report:**

Filter material issue report by selecting filter criteria i.e. date range of issue date, all material or material wise. Click on “Display Report” for display report.

#### **iii) Material Purchase Report:**

Filter material purchase report by selecting filter criteria i.e. date range of purchase date, all material or material wise. Click on “Display Report” for display report.

### **Hall Ticket Report:**

Filter hall ticket report by selecting filter criteria i.e. Examination wise, Course wise, student wise. Click on “Display Report” for display report.

### **Identity Card Report:**

Filter identity card report by selecting filter criteria i.e. date range of admission date & student wise. Click on “Display Report” for display report.

### **Tax Report:**

Filter tax report by selecting filter criteria i.e. “Receipt from date & to date”. Click on “Display Report” for display report.

### **Student Attendance Report:**

Filter Student Attendance Report by selecting filter criteria i.e. Select view type i.e. list view & details view , date range of admission date, student wise, faculty wise, Batch wise. This report will be show absent student record. Click on “Display report” for display report.

### **Placement Report:**

Filter Student Placement Report by selecting filter criteria i.e. select date range of joining date, student wise, company wise. Click on “Display report” for display report.

### **Examination Report:**

#### **1) Answer Sheet Details Report:**

Filter answer sheet details report by selecting filter criteria i.e. Examination wise, Question paper wise and hall ticket wise. Click on “Display report” for display report.

#### **2) Provisional Certificates:**

Filter provisional certificate report by selecting filter criteria i.e. Examination wise & student wise. Select view type i.e. list view & details view. Click on “Display Report” for display report.

#### **3) Certificate Parent Copy Report:**

Filter certificate parent copy report by selecting filter criteria i.e. student wise & student status wise. Click on “Display Report” for display report.

## **Settings:**

### **My Theme:**



Double click on form layout items to set the background color, font color & font size. From this you can change background color, font color & font size of each form. Click on “Save Theme” means set this theme as a default theme for the current login user. Click on “Apply Theme” means apply newly created theme. Then if you click on “Delete Theme” then that theme will be deleting.

## **Search – Display:**

From this screen you can set the find screen display & searchable fields of entire application. Select screen on which you want to change display & search settings. Then check or uncheck column to enable or disable fields in selected screen. Click on save button to update this record.

## **User Management:**

Create or update user from screen. Select role from role list. Select employee from employee list. Click on save button to update this record. Find out by search criteria. Click on delete to that entry.

## **Role Management:**

Create new role & assign permission. In add row checked means user can add new record. In edit row checked means user can edit & update record. In delete row user can delete record. In view row checked means user can view only those records which were created or updated by him. In view all row checked means user can view all user’s created or updated records. Click on save button to update this record.

## **Utility:**

### **Alert:**

Set alert configuration from this screen. Then click on save button for current alert setting.

### **Photo / Signature:**

Click on attach photo image & then upload student photo image. Click on attach signature image & then upload student signature image.

### **Notice / Announcement:**

Select notice / announcement date. Enter notice / announcement for the students or for groups. Check list if notice/announcement to be display at student attendance login. Centre Coordinator can set reminder to student for fees payment by this screen. Message box will be display at student attendance login. This screen can also used for set reminder different group for student fees collection or faculty meeting. Click delete button to delete this record. Click save button to update this record.

### **Auto SMS Configuration:**

In this form select form/document, event and Dynamic field wise create SMS text for send student and reporting person. Click Save button to set Auto SMS configuration.

### **Feedback:**

#### **Feedback Questions:**

Enter feedback question like “What is performance of faculty? “ Enter feedback options like “Excellent, Good, Average, Bad” etc. Click on save button to update this record. Click on delete button to delete this record.

#### **Feedback Form:**

Select “Active from date – To date”. Enter feedback form name. Select form applicable batches & select questions from list. Click on save button to update this record. Click on delete button to delete this record.

#### **Feedback Report:**

Filter feedback report by selecting filter criteria i.e. date range of admission date & student wise. Click on “Display Report” for display report.

### **Ticket:**

#### **Ticket Status:**

Enter ticket status like “Completed, Resolved, Pending” etc.

#### **Ticket Type:**

Enter ticket type like “Complaints, Suggestion, High, Medium, Low” etc.

#### **Tickets:**

Admin can check tickets generated by student in the form of either complaints or suggestions and can resolved the same.