FUND BASED ACCOUNTING SOLUTION

A User Guide for SFACTS – Fund Based Accounting Solution

Disclaimer:

This document highlights the key activities that are enabled in the software application. Some of the features, validations, reports are subject to change which is governed by the product roadmap.

This guide explains the provisions designed for various transactional processes which are standard and that are commonly accepted practices. However, the exceptions, institution-specific rules/policies will be handled separately and its process will be defined to that specific institution and its users.

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1. Introduction

1.1 What is SFACTS?

SFACTS – Fund Based Accounting Solution is an application specifically designed to the processes unique to a Research Institution having multiple project grants (Plan, Non-Plan, Others) from various funding agencies; it integrates all the aspects of financial accounting with necessary compliances and all the sections within the Institute like Projects, Purchase, Accounts, etc.

1.2 This Document

This document covers the User-Guide from the Principal Investigator (PI) perspective and explains the essentials in each of the steps that the PI is expected to transact in the Software Application which are standard and commonly accepted practices in the majority of the organizations/institutions.

PI (Principal/Project Investigator) - User Guide

2. Logging-in Process in SFACTS

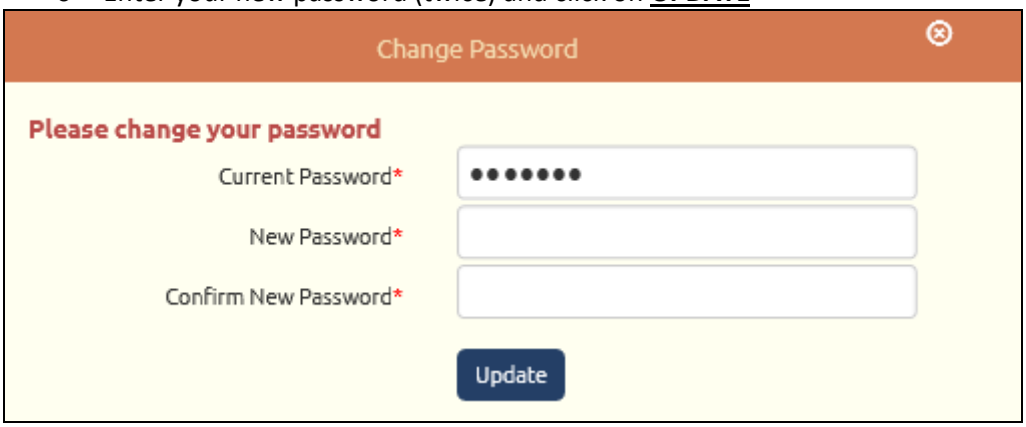
- Open a browser from your system [**Firefox is highly recommended**]
- Enter the respective link provided to access SFACTS Ex: http://domainame or IPaddress/sfacts (*Note: In the Login Credentials email, that has been sent from the system, the applicable URL would be available for your respective Institution*)
- **Enter the *'User ID'* & *'Password'* assigned to you.**

IMPORTANT NOTE:

On your very "**first**" log-in please do the following:

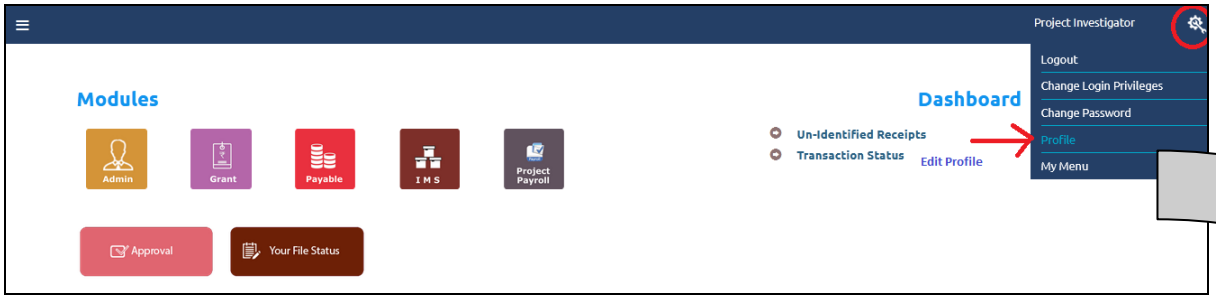
☑ **Change your password**

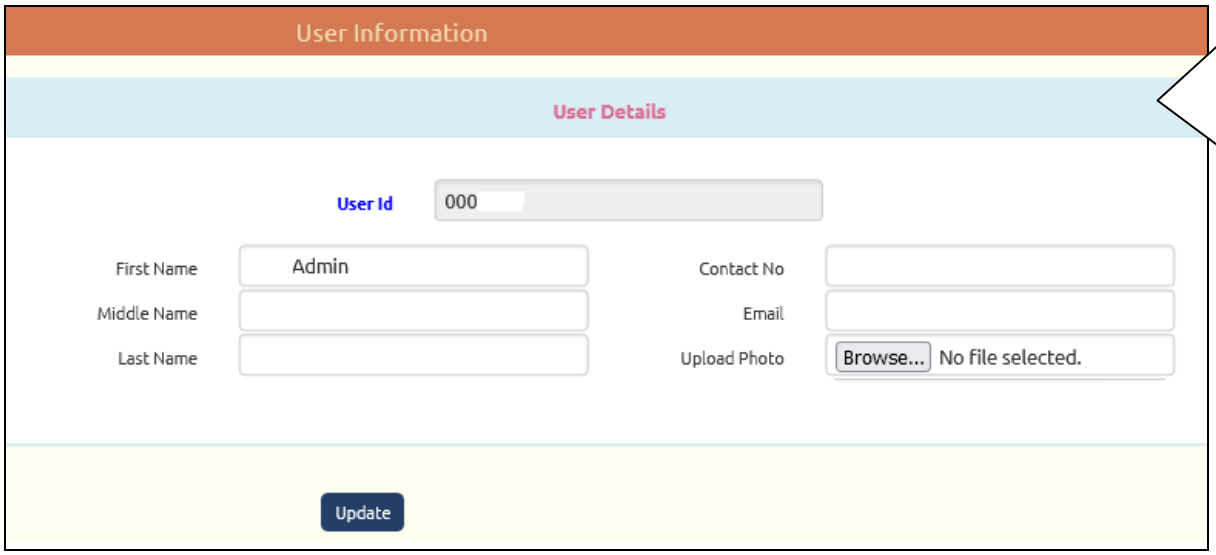
- Enter your new password (twice) and click on **UPDATE**



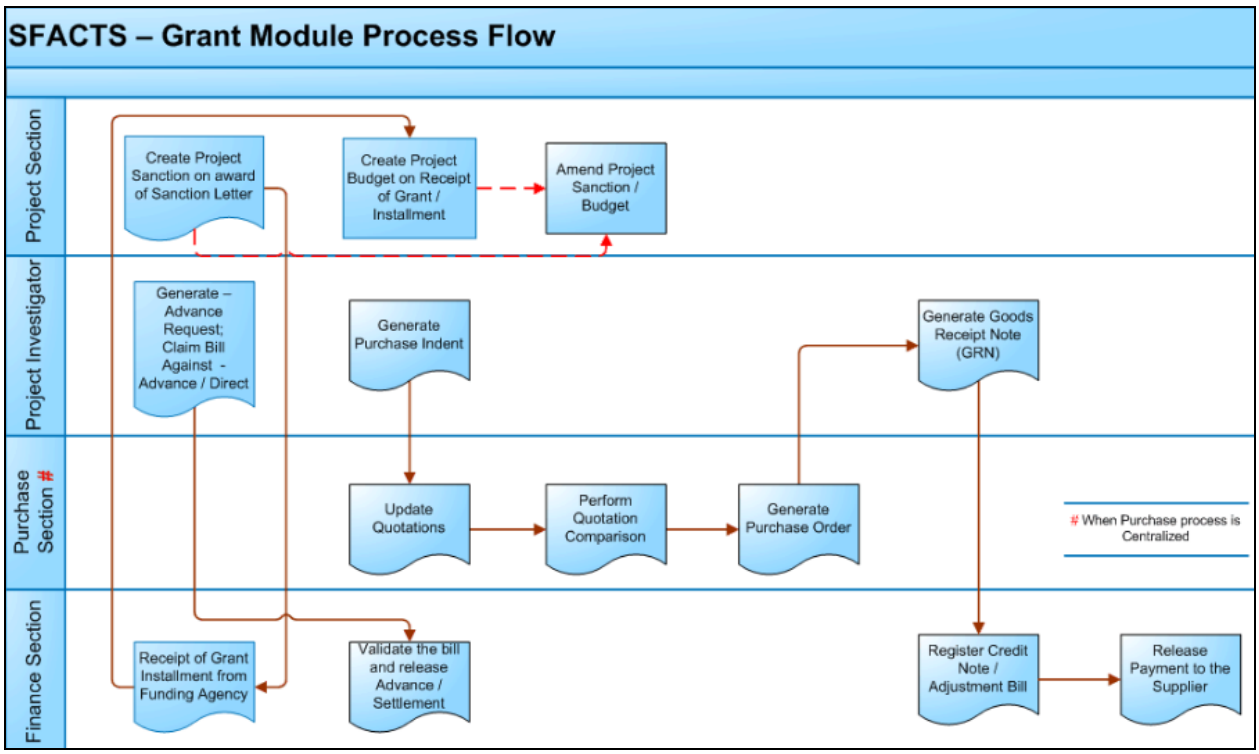
☑ **Edit your Profile**

- Please check your Contact Number (Mobile Number) as well as Email_ID.
  - These will be used by the system to generate alerts/triggers of an event including the "Forgot password".
- After making changes (if any) click on **UPDATE**

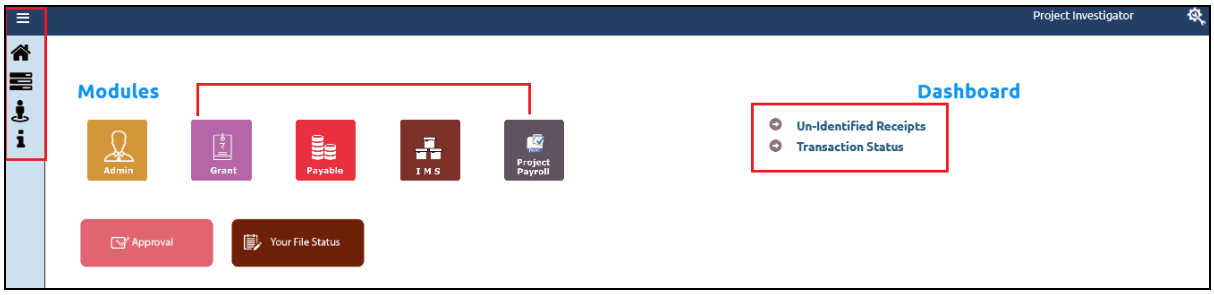




3. Process Flow Diagram



4. About Main Page



1. Modules:

List of Modules Accessible by the login user – Modules will vary depending on the Role-Access rights assigned to the Login user

2. Logout:

For logging out from the application – ***Important***: *Never close the browser to exit from the application. Always exit the application using the Logout button for better Security*.

3. Transactions Approval Status - DASHBOARD

Displays the status of various transactions delivered through Approval Engine. Under various modules, the system highlights the status of approval for the respective PI and their related projects.

4. Unidentified Receipts - DASHBOARD

This is an Organization-wide Summary of Bank Receipts which has been received by various funding agencies through NEFT / RTGS activities without mentioned the concerned Projects. As a PI, it is important to review these statements regularly and alert Finance if these receipts belong to your respective Projects.

5. Approval / Your File Status

Under the Approval screen, the system will display the relevant transactions for its approval for your role. On the same screen, the user will be able to see the relevant notings from other approvers and the transaction details.

In the Your File Status screen, the user will be able to see their respective transactional approval status with notings by the approvers.

Entering Transactions and saving / Authorization process

As a guiding rule, every transaction screen is predefined with relevant information which is entered in their respective "*Master Files*". The objective is to minimize the data entry at the transaction level as well as to reduce manual errors.

The Mandatory fields (*The fields must have appropriate data*) are marked with a * (asterisk).

There is online help assistance provided at each of the fields and a logical error controlling mechanism is built-in in the application which gives On-Screen error messages.

An easy search is provided at each of the pull-down menu and no need to memorize any codes/names while doing the transactions.

Before starting any transaction, the prerequisites tasks are expected to be completed and these activities would be accomplished by the respective process owners.

Creating ADVANCE REQUEST:

Prerequisite Tasks:

Various masters and other set-up have been completed such as Funding Agency, Project Master, Chart of Account (Debit Head) for respective Project, Type of Request No., Category of Indent etc.,

Process:

In this process, the Principal / Project Investigator (In this document this will be referred to as "PI") would be preparing the request for an advance against their respective Project with its appropriate Account head (Chart of Account – '**CoA'** in the application parlance). The PI is expected to select the 'right' project name and its CoA.

The rules/policies of the Institution are built-in to claim the Advance against each of the projects.

The PI will be able to request an Advance only for:

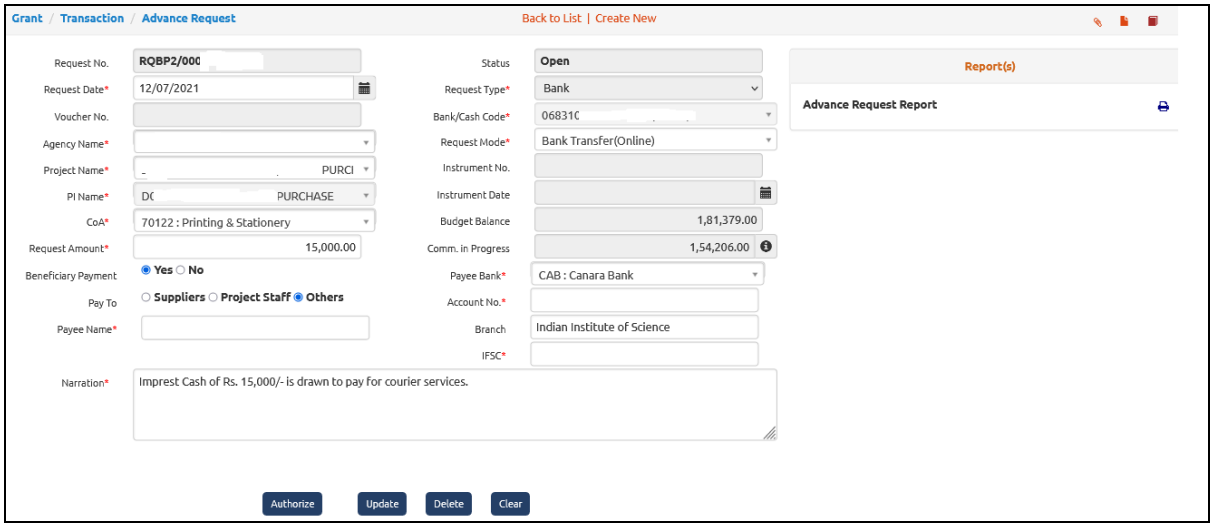
- ☑ Only for the Project(s) which the PI is assigned
- ☑ The project which is "Active"

Transaction Entry:

Click on: Grant Module → Transaction Menu → Advance Request

5. ADVANCE REQUEST:

Select **"Advance Request"** from the Transaction pull-down menu under the Grant module



To add the transaction, enter the following in the respective fields:

Request No.	Auto-generated number and the same will be filled by the system on saving.
Request Date *	Select from the Calendar the date of request. The system does not allow future date transactions.
Voucher No.	The system assigns a Voucher Number on its Authorization
Request Amount *	Enter the Amount requested towards this project
Request Type	The modes of payment are shown and select the appropriate from the pull-down menu. As a policy, the Request is always "Bank"
Bank Code *	Based on the Project, the system will automatically display the Bank Account. All the transactions for the selected Project will be managed through this identified Bank. The system has been built-in with validation to ensure the right Bank is taken for the respective Project.
Request Mode *	This is a sub-set of Request Type – Select the appropriate from the pull-down menu
Instrument No.	On its **Authorization**, the Cheque / DD Number will be issued by the Finance section which is also automated. This may not be applicable for direct fund transfer through NEFT/RTGS.
Instrument Date	Cheque / DD Date will appear after **Authorization** by Finance section
Status	Default Status will be 'Open' when the transaction is saved. Based on the flag, the display will have the appropriate status.
Agency Name *	Select the appropriate "Funding Agency" from the pull-down menu
Project Name *	Select the Project Name – Here, the system will only display the projects about the respective PI.
CoA *	Chart of Account – Select the appropriate Account Head (Debit Head) on which you will be claiming the Advance.

Budget Balance	The system will automatically populate the available balance at the point of transaction for the given Project and its CoA. If the Balance available is less than the Claim / Request Amount, the system will not allow further. If any exceptions, discuss with your respective departments and adhere to the policy as stated by the Organization / Institution.
Narration *	Enter descriptive narration of reason of this request. Please enter as much as possible the details so that they can help in future audit issues.

*** - Mandatory Field**

After completing the above, click on the **Save** button; You can edit if required and click on the **Update** button to save the updated data.

After *saving*, you are required to **authorize** the Transaction.

- ☑ *You cannot change any data post Authorization Process. If it requires to be changed, please request the next approval authority to "Reject" the said Request Number so that you can rework the Advance Request*.

Post Authorization by PI, the application will do the following:

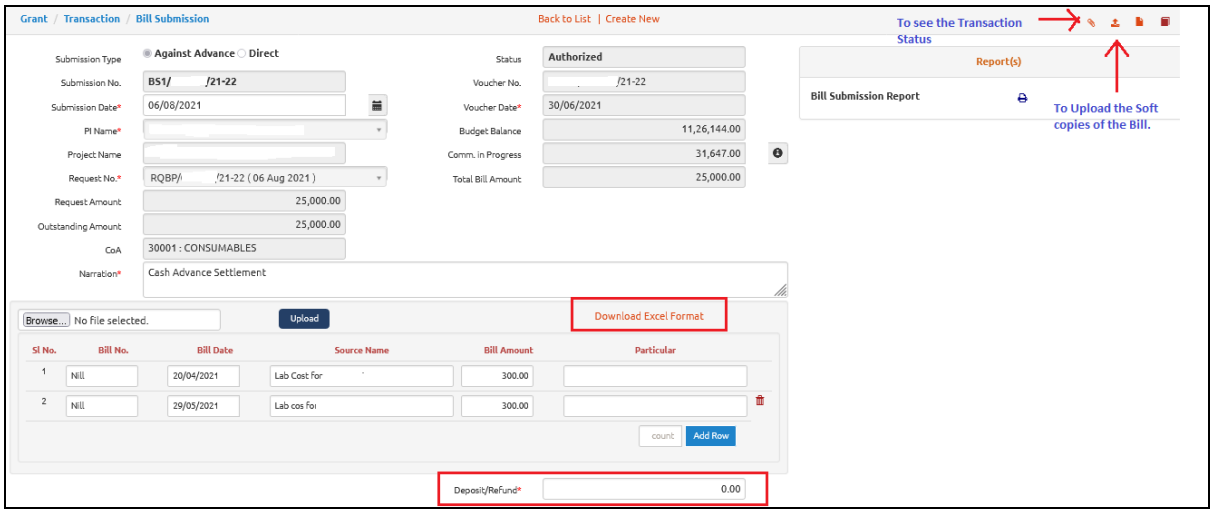
- ☑ Based on the approval flow defined in the System, the application will move the file to the respective approvers and finally, it reaches the Finance Section to release the Payment
- ☑ On Approval from Finance, the requested amount will be **committed** against the selected Project/CoA. This process will reduce the available budget balance for further commitments.

Transaction Entry:

Click on: Grant Module → Transaction Menu → **Bill Submission**

6. BILL SUBMISSION – Against Request No.

Select **"Bill Submission"** from the Transaction pull-down menu under the Grant module



To add the transaction, enter the following in the respective fields:

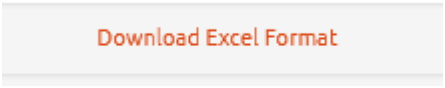
Submission	The system gives two provisions to update the submission of the bill against the expenses spent on the Project – "**Against Request No.**" or "**Direct**" mode. Select the Appropriate mode of submission
*The following steps should be followed when the Submission mode is selected as "**Against Request No.**"*	
Submission No. *	The system will assign a unique number. The same will appear after saving the Transaction.
Submission Date. *	The actual date of Submission of bills – Select from the Calendar provided
Narration *	Enter the narration which is easy to comprehend the reason for this transaction. These are being used/reviewed by the appropriate approval authority.
Request No.	The system will display all the *open* availed advance Request Number(s). Select the appropriate reference number for the transaction.
Request Date	The system will fill once Request No. is selected from the dropdown.
Request Amount	The system will fill once Request No. is selected from the dropdown.
Total Bill Amount	This is the total of entries made under **Bill Amount**. This is system-generated value.
Voucher No.	After Approval of payment by the Finance department, the system will display the respective Voucher Number for the said Indent.
Voucher Date	- *As above* – Here, the Voucher Date will be displayed
Project	The system will also display the Project on which the advance was raised/approved.
After updating the above, enter the bill details in the multi-line section	
Bill No.	Enter Bill No. (of the bills which you have received against your expenditure)
Bill Date	Date of Bill – Select from the Calendar provided
Source Name	Enter the Vendor / Service provider name here

Bill Amount	Enter the Actual amount for the respective Bill
Particular	Additional Remarks if any

*** - Mandatory Field**

IMPORTANT NOTE: To speed up the activity, the system has been provided an Excel Template Upload facility. Here, the data (bill-related info) can be entered in the defined Excel template and can be uploaded for a quicker data entry process. To use this facility, follow these steps:

Step-1: Click on the Download the Excel Icon (*Available below Narration***)**



Step-2: Save the Excel Template on your local system

Step-3: Update / Enter the bill details in the excel template and save it on your local system. *Please do not add any columns or inter-change columns and also do not do any totaling in the workbook. The system will check and validate the format while uploading.*

Step-4: Click on Browse under "Upload Bill" – Select the appropriate file from your local system

Step-5: Click on the Upload Icon 

Step-6: System will validate the format and if it is correct the excel input details will be displayed on the screen and you can further edit if required or can be saved to move forward.

After completing the above, Click on the **Save** button

Uploading the Scanned copies of the Bills/Invoices

- *The system is provisioned with uploading the scanned copies of the bill/invoice; These can be reviewed/downloaded by the respective approvers during their approval process. However, as a standard rule, the hard copies (original) of bills/invoices need to be available at the Finance section for future audits and other compliances. But, the respective Institution has the discretional procedure to follow their practices and systems.*

After *saving*, you are required to **Authorize** the Transaction.

☑ *You cannot change any data post Authorization Process. If it requires to be changed, please request the next approval authority to "Reject" the said Submission Number so that you can rework on the Indent*.

After *Authorizing*, take a print of the Bill Submission report, attach your bills (in original) and submit to the appropriate department/section.

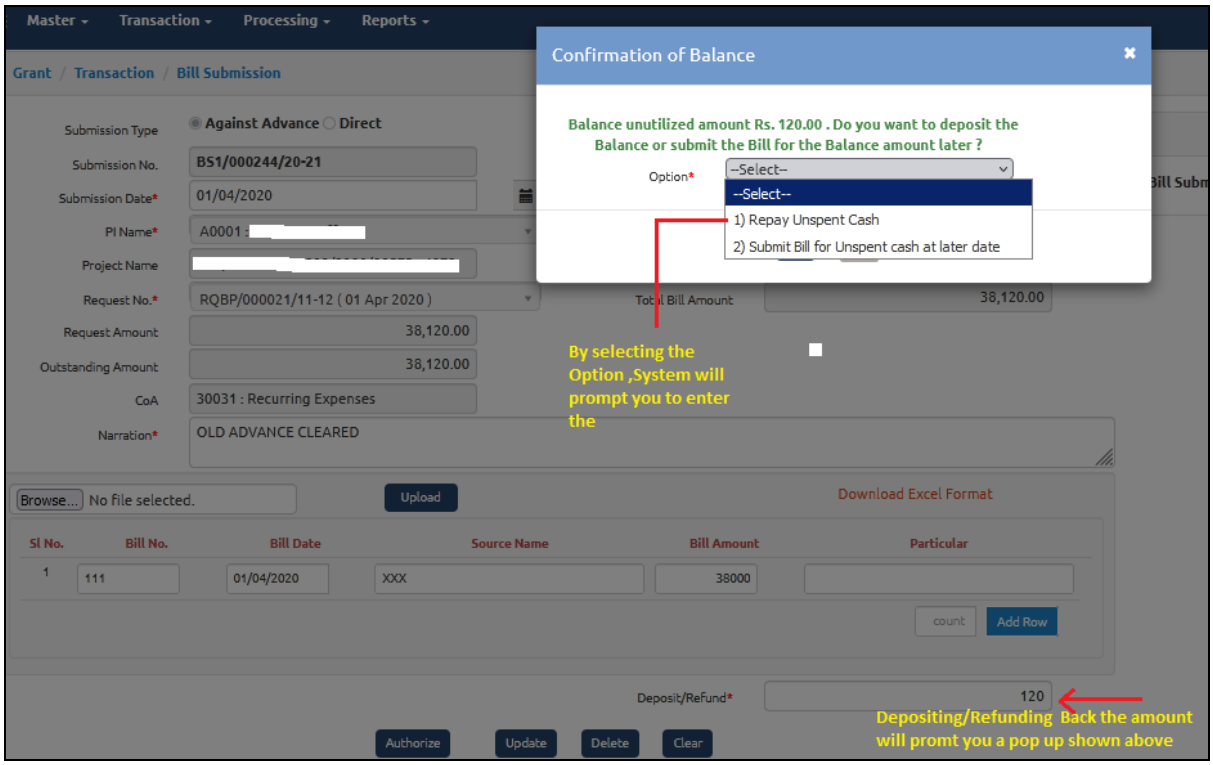
The concerned authorities @ Project/Finance Section will scrutinize the bills and **approve** the said transaction in the system.

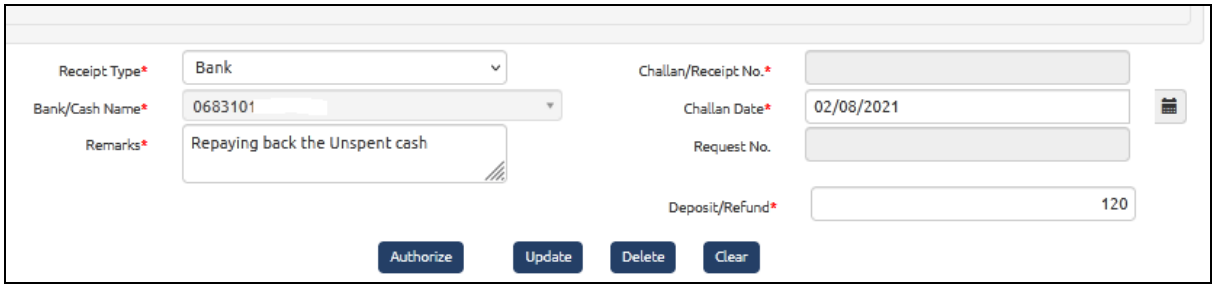
☑ NOTE: If the value of submitted bills is below the value of Advance taken, the system is designed to address the same in the following ways:

- Deposit to the Institution Bank Account
- Deposit the Cash/Cheque to the respective Cash/Accounts Section

☑ If the option is Bank Deposit: the following processes will give you its transactional activities:

☑ To enter the above Bank Details, follow the below said steps:





☑ Expenditure will get confirmed to the extent of bills approved by Finance.

☑ Based on the above processes, the system will clear the advance and enables the PI to raise the next advance – As a guiding principle, the PI cannot raise an advance unless the previous is settled or Authorized.

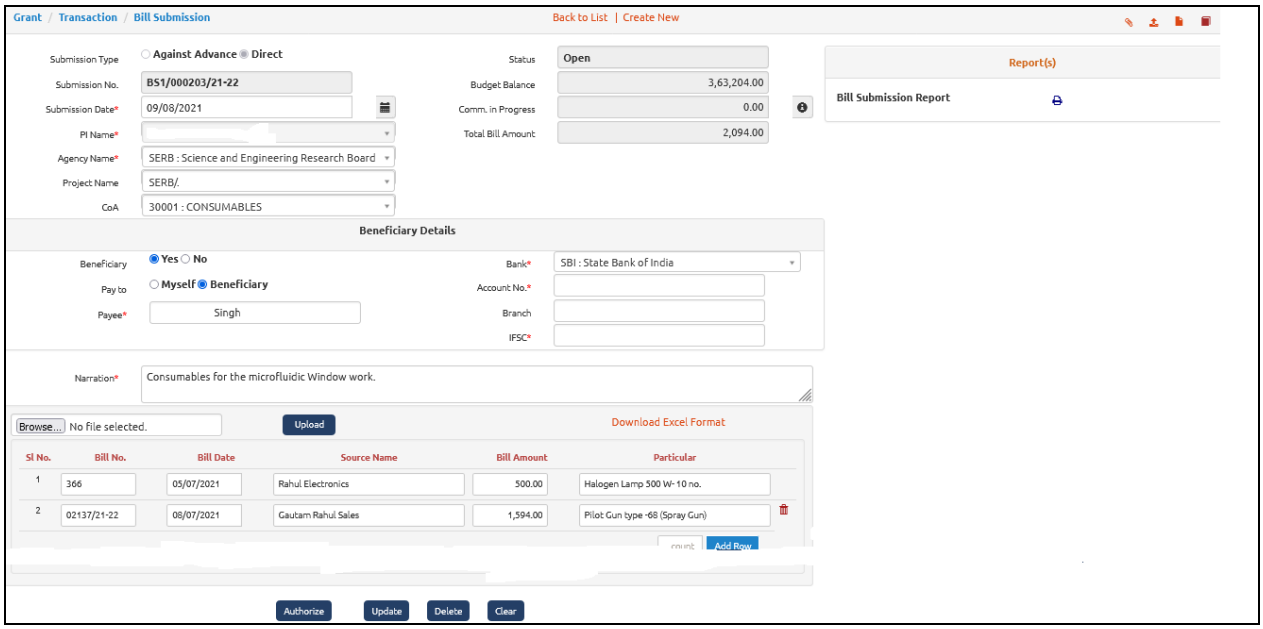
☑ However, the applicable rules/policies of the Institution which has been configured will be final.

Transaction Entry:

Click on: Grant Module → Transaction Menu → **Bill Submission**

7. BILL SUBMISSION – Direct (Reimbursement)

Select **"Bill Submission"** from the Transaction pull-down menu under the Grant module. Click on the "Direct" button and continue the following steps:



To add the transaction, enter the following in the respective fields:

Submission	Select the **Direct** mode of submission
*The following steps should be followed when the Submission mode is selected as "**Direct.**" (Also popularly known as the Reimbursement process)*	
Submission No. *	The system will assign a unique number. The same will appear after saving the Transaction.
Submission Date. *	The actual date of Submission of bills – Select from the Calendar provided
Narration *	Enter the narration which is easy to comprehend the reason for this transaction. These are being used/reviewed by the appropriate approval authority.
Agency name	Please select from the drop-down
CoA	Please select from the drop-down
Project Name	Please select from the drop-down. Here, the Project name is displayed for the Request no. selected.
Budget balance	Automatically filled once CoA is selected. Here, it shows the budget remaining for the selected CoA.
Total bill amount	This is the total of entries made under **Bill Amount**. This is system-generated value.
After updating the above, enter the details in the multi-line section	
Bill No.	Enter Bill No. (of the bills which you have received against your expenditure)
Bill Date	Date of Bill – Select from the Calendar provided
Source Name	Enter the Vendor / Service provider name here
Bill Amount	Enter the Actual amount for the respective Bill
Particular	Additional Remarks if any

*** - Mandatory Field**

IMPORTANT NOTE:

To speed up the activity, the system has been provided an **Excel Template Upload facility**. Here, the data (bill-related info) can be entered in the defined Excel template and can be uploaded for a quicker data entry process.

To know how to use this facility, refer to the above under the "Against Request No." section

After completing the above, Click on the **Save** button

After *saving*, you are required to **Authorize** the Transaction.

- ☑ *You cannot change any data post Authorization Process. If it requires to be changed, please request the Finance Section to "Reject" the said Submission Number so that you can rework on the Indent.*

After *Authorizing*, take a print of the Bill Submission report, attach your bills (in original) and submit to the finance section.

The concerned authorities @ Finance Section, will scrutinize the bill and **Authorize** the Transaction in the system.

Post Authorization, the application will do the following:

- ☑ Sets off the Amount against the Advance Request.
- ☑ If the Submission of Bills is below the value of Advance taken, please refer to the earlier section and follow its steps:
- ☑ Expenditure will get confirmed to the extent of bills approved by Finance.

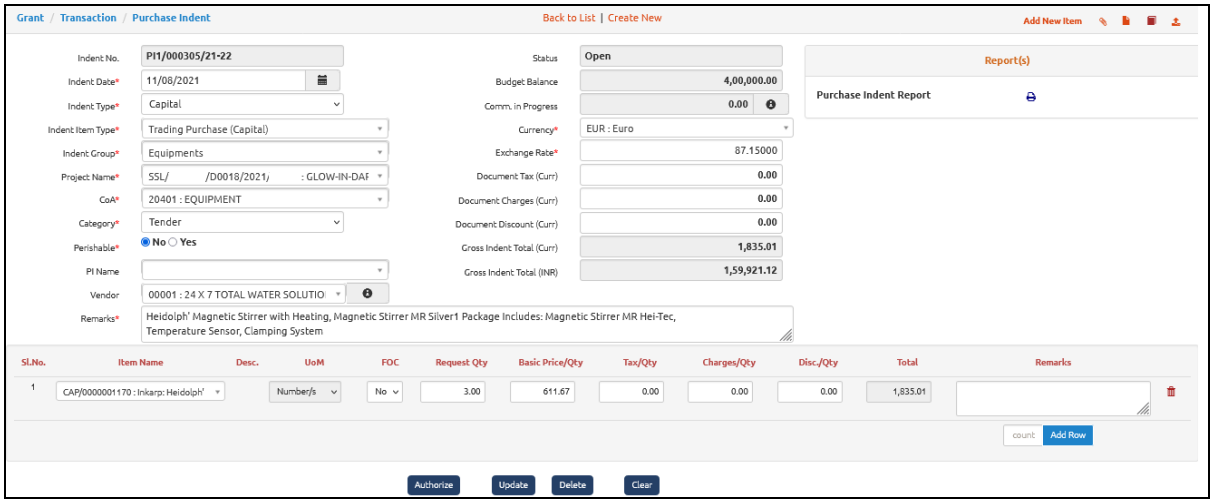
PLEASE NOTE: If the Project tenure is closed at the time of Bill Submission, the System, will not display the said Project under the Project dropdown. To enable the bill submission, you are required to extend the project end date and a separate process needs to be followed which requires approval from the Director or Funding Agency. Discuss with the Project Section or respective office for amending the date.

Transaction Entry:

Click on: Grant Module → Transaction Menu → **Purchase Indent**

8. PURCHASE INDENT:

Select **"Purchase Indent"** from the Transaction pull-down menu under the Grant module



To add the transaction, enter the following in the respective fields:

Numbering Type *	It is the default in Automatic mode. Please do not change
Indent No.*	The system will assign a unique number. The same will appear after saving the Indent.
Indent Date *	The date of Indenting the request – Enter the date using the Calendar provided
Indent Type *	Select the appropriate Indent Type – Consumable; Capital Indent
Expected Date *	Enter the expected date of delivery of the Indented item
Category *	Select the category from the pull-down menu – Proprietary; Rate Contract or Others.
Vendor Name *	Select the Vendor / Supplier Name from the Pull-Down menu – This is a common vendor master updated by the Purchase Section. If the Vendor Name which you are searching is not *available*, select "New Vendor" from the Master, and update the relevant details in the next two cells (Name & Address)
Name *	This field will become "mandatory" once you choose "NEW VENDOR". Here, please enter the Vendor Name, and the same will be reviewed/edited by Stores Department and will convert/update into the Vendor Master.
Address *	Enter the Address of the New Vendor
Project Name *	Select the appropriate Project Name from the Pull-Down menu
CoA *	Chart of Account – The appropriate Account Head (Debit Head) on which the indent raised will be picked up from the multi-line items under the heading "*Indent Details*"
Budget Balance	The system will display the available budget balance (after considering the commitment) upon selection of the Project and its respective CoA – This is a read-only field, cannot be edited or changed
Currency	Select the respective Currency from the drop-down. This field is mandatory for Indent Type either Proprietary or Rate Contract

Document Tax **	The item-wise tax would be entered under "Indent Details" – However, if you want to give overall Tax on all products put together, and then enters the absolute value here.
Other Charges **	The item-wise charges would be entered under "Indent Details" – However, if you want to give overall Tax on all products put together, and then enters the absolute value here.
Document Discount **	If there is a total discount on the entire Indent offered by the Vendor, enter the same at this field – Discount should be in absolute value
Gross Indent Total	The system will compute from the multi-line items under the heading "*Indent Details*" and the net amount will be displayed here. This is a read-only field and cannot be edited.
Remarks *	Enter easy to comprehend the reason for this transaction. These remarks are being used/reviewed by the appropriate approval authority.

*** - Mandatory Field**

**** - These are non-mandatory fields and if you have the data and then you can enter otherwise leave the field blank.**

To add the transaction in multi-line under the heading "***Indent Details***", enter the following in the respective fields:

Item Code **	Select the Item Code from the Pull-Down Menu. If the Item Code / Name does not appear, enter by selecting "NEW" and update the same in the next field
Item Name	If the item is new, select the Item code as "New" and then enter the appropriate Name here
UOM	Unit of Measurement – Select the appropriate from the drop-down
FOC	**Free of Charge** – Default is "NO" – If select "NO" – No values will be considered. This is used in the case of Product to Product Schemes (Ex: Buy 1 get 1 free) offered by the Vendor.
Request Qty	Indented Quantity
Basic Price / Unit	Enter the Basic Rate of the indent item
Tax / Unit	Enter the applicable Tax per Unit – Absolute Value
Charges / Unit	Enter if any additional charges per unit – Absolute Value
Discount / Unit	Enter if any Discounts applicable for the respective item – Absolute Value
TOTAL	The system computes based on the above input
Remarks	Enter if any specifications for the entered Indented item, which will help the Stores / Purchase section to get the right Vendor

*** - Mandatory Field**

**** - Certain Institutions follow the centralized Item Master registration process. If it is centralized and then the PI will not have the option to 'Add' New Items in the master.**

After completing the above, click on the **Save** button; To edit, click on the transactions and make the necessary changes/modifications and click on the **Update** button.

After *saving*, you are required to **authorize** the Transaction.

☑ *You cannot change any data post Authorization Process. If it requires to be changed, please request the Stores/Purchase Section to "Reject" the said Purchase Indent Number so that you can rework on the Indent*.

Post Authorization, the application will do the following:

- ☑ The System will send the authorized information to the respective section which is based on the organizational approval process.
- ☑ The respective Section will review the Indent, and receive the quotation and prepare the quotation comparison sheet which can be viewed/confirmed by the Project Investigator **
  - *** The quotation comparison process can also be completed by the respective section/department and need not require a confirmation from the PI. These are based on the institution's specific policy/guidelines.*
- ☑ Review the same under the **Quotation Comparison** process. This step is a must for the Stores section to generate the Purchase Order.
  - This is not applicable if the Indent Type is Proprietary or Rate Contract. However, in these two specific cases, respective authorization/approval are required / to be obtained from the Stores / Head of Institution before purchasing the same.

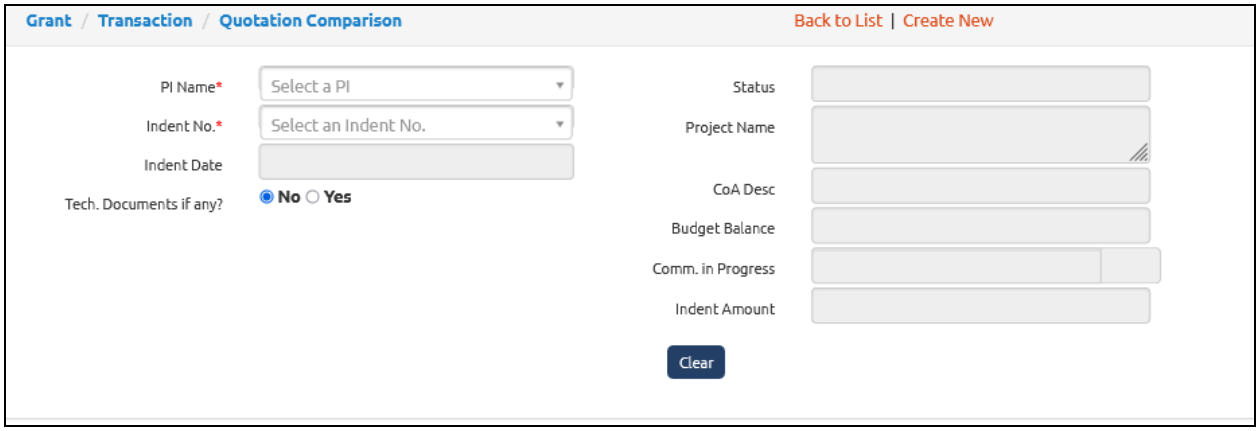
Click on: Grant → Transaction → **Quotation Comparison**

9. QUOTATION COMPARISON:

THIS IS APPLICABLE ONLY FOR INDENT CATEGORY TYPE is "OTHERS", wherein for the requested Indent, multiple Quotations will be received and updated by the Stores / Purchase Section, and in turn, the respective PI will be review and give their consent to proceed towards the Purchase Order.

THIS SCREEN IS NOT APPLICABLE IN CASE OF INDENT CATEGORY IS "PROPRIETARY" OR "RATE CONTRACT" ---DEPENDS ON THE INDIVIDUAL INSTITUTION'S POLICY

Select "Quotation Comparison" from the Transaction pull-down menu under the Grant module

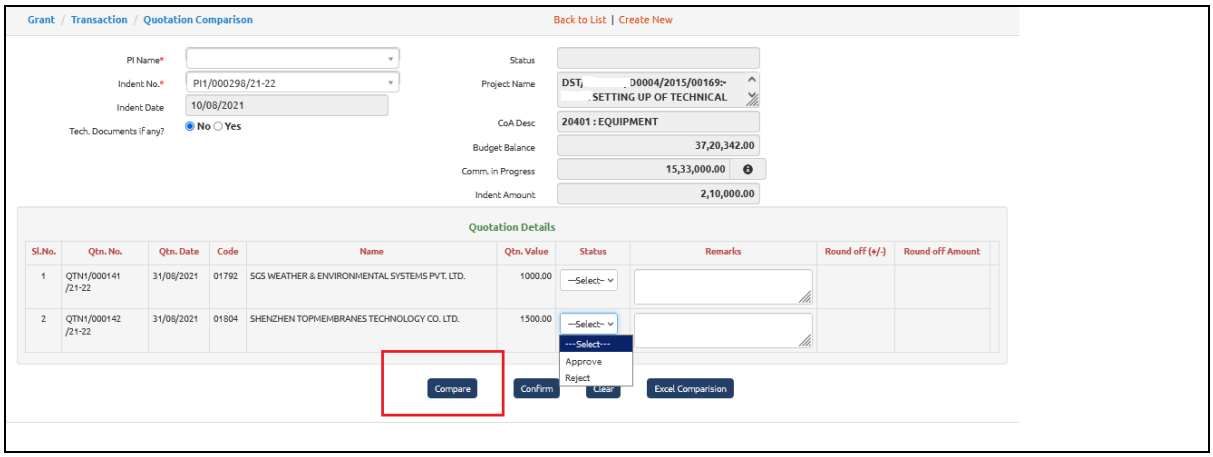


To view the Comparison for the respective Indent, , enter the following in the respective fields:

PI Name *	Select the PI Name from the drop-down.
Indent No.*	Select the respective Indent Number for which the Comparison is made.
Indent Date	The system automatically populates the details based on the selected Indent Number.
Indent Amount & Expected Date	

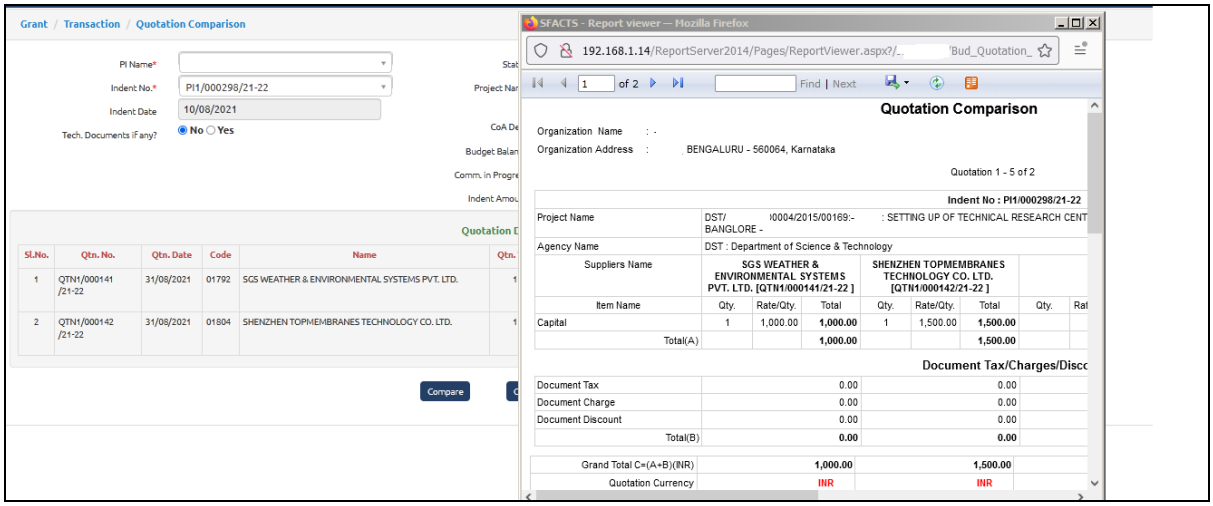
*** - Mandatory Field**

After selecting the appropriate Indent Number, the system will display the following screen:

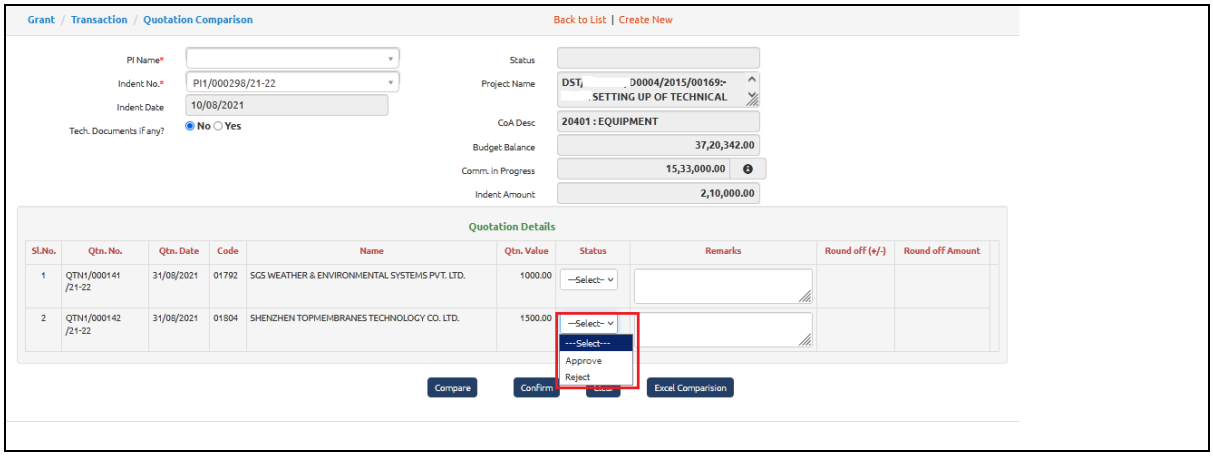


To check the detailed Comparison report, click on the "Compare" button, a detailed Comparative analysis report is shown which essentially displays the Vendor wise, Item wise, cost breakup including their discounts, taxes, and charges if any.

This will be seen like this:



On your review, you can give your Approval for the respective Vendor to proceed further. This can be achieved by following these steps:



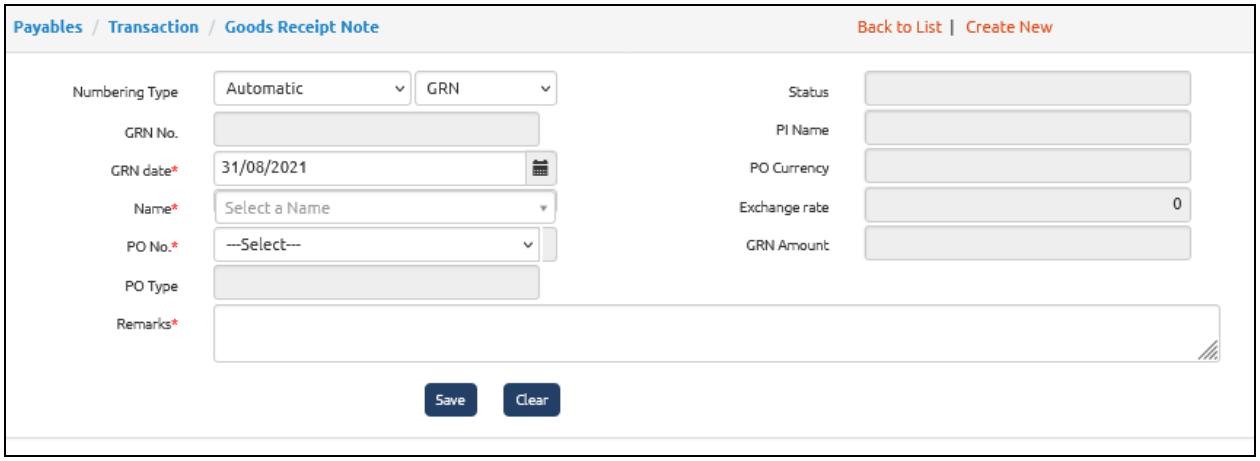
Select, Approve or Reject for each of the Line Item (Sl.No.) and give the remarks respectively. If you are approving a vendor, the other two have to be "REJECTED" with respective remarks. This step is mandatory.

After PO Commitment and on receipt of the ordered item, the PI is expected to confirm the same against their PO. The process is as follows:

Transaction Entry:

Click on: Payable Module → Transaction → **Goods Receipt Note**

10. GOODS RECEIPT NOTE (GRN):



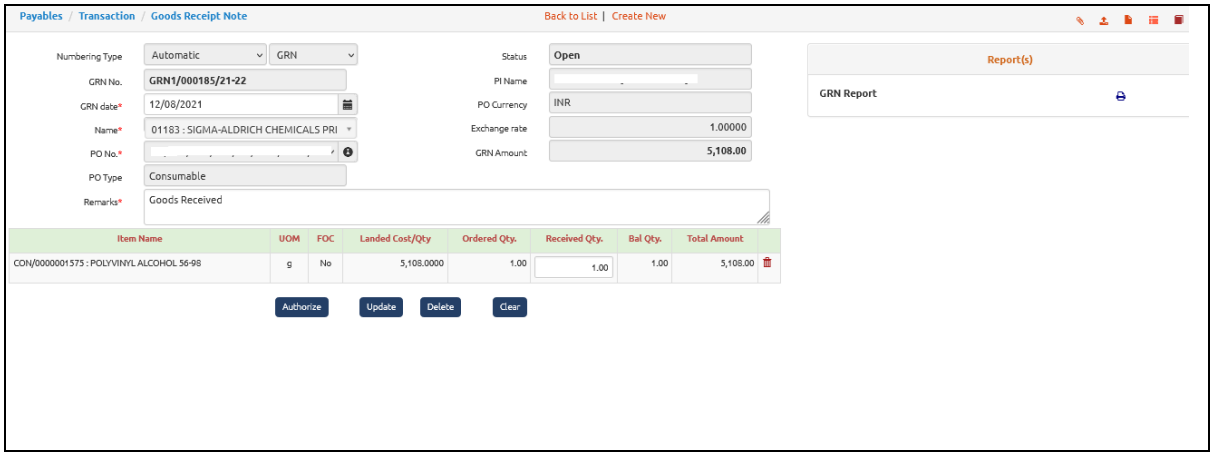
The GRN (Goods Receipt Note) should be carried after receiving the respective item/goods on the PO Issued. This step is the **confirmation** for Stores / Finance to take up the next activity of releasing the release payment to the Vendor. The process to do the GRN is as follows:

Numbering Type *	Automatic is default and do not change; Select the **GRN** under the dropdown
GRN No.*	The system automatically generates the number after saving the transaction
Name *	Here, Name represents Vendor Name. Select the appropriate Vendor /

	Supplier Name under the drop-down menu
PO No. *	Purchase Order (PO) Number – Select the relevant PO number for the selected Vendor Name; Here for the same vendor, there could be more than one PO's. Hence, select the appropriate PO number for which you have received the item / stock.
GRN Date *	Select the date on which you have received the physical item/stock. The system will not allow future date(s).
Remarks *	Enter the item summary details which will help the related departments to proceed further.

*** - Mandatory Field**

After selecting the above, the system will populate the item-wise details of the respective PO in the screen, which is as shown below:



Please enter the physical quantity received against the particular PO (under **Rcvd. Qty.** column) This process is to confirm that you have received the quantity in good condition and as per the specification provided by you which is reflected in the respective PO.

If there are short / part delivery, enter the actual quantity received and the balance item due can be entered subsequently after receipt of the same using the same procedure. The system will populate all the Open PO for the respective Vendor in the GRN process.

Please click on SAVE and subsequently AUTHORISE. After authorization system will lock the particular GRN.

Take a print of the GRN once you complete the Authorization process. Select the "Print" icon on the right-side top screen, take a print and submit to the Stores / Purchase section for the next steps.

The system is provided for the request for the vendor payment to the finance section for which the item/material has been received and confirmed through the GRN. The steps are as follows:

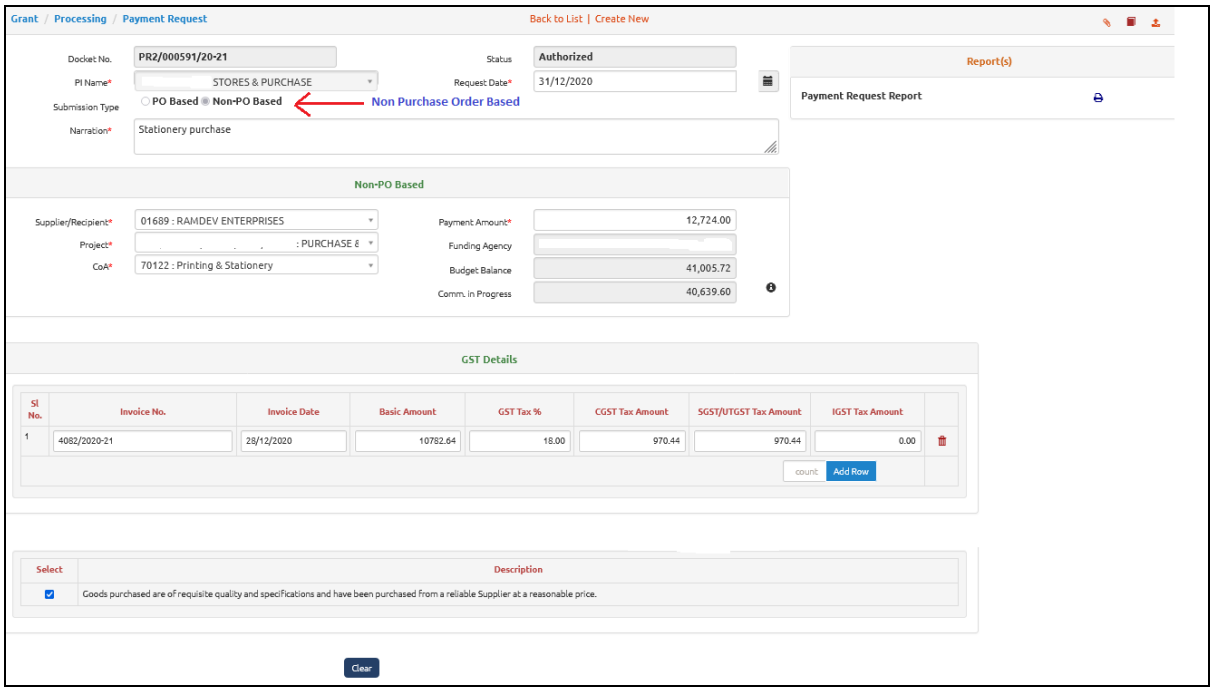
Transaction Entry:

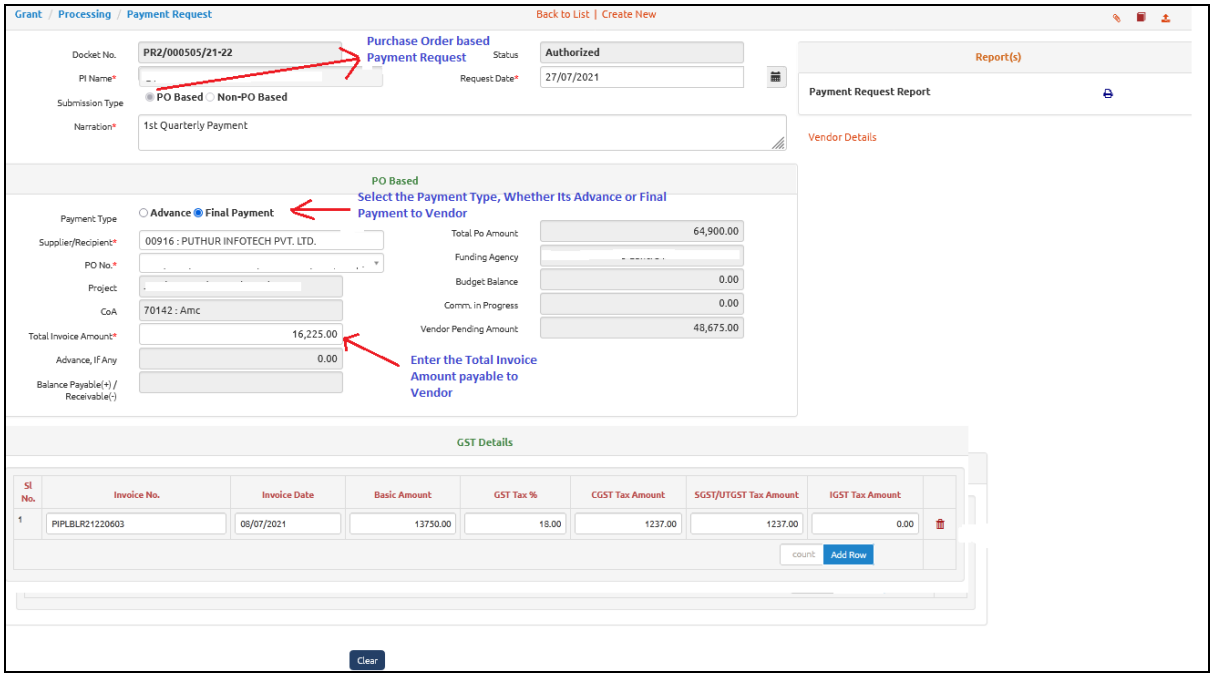
Click on: Grant → Processing → **Payment Request**

11. Payment Request

Once the **GRN** is **Authorized**, PI can initiate a Payment Request to the Vendor by Selecting based on the Purchase Order Based or Non-Purchase Order Based.

Based on this, the Finance section will release the payment to the Vendor subject to statutory deductions (if any).





The Process to do the Payment Request is as follows,

Docket Number *	The system automatically generates the number after saving the transaction
PI Name.*	Auto Populates
Supplier Name *	Here, Supplier Name represents Vendor Name. Select the appropriate Vendor / Supplier Name under the drop-down menu
Project. *	Select from the drop-down menu from which Project you want to Pay to Vendor
CoA *	Select Appropriate CoA
Remarks *	Enter the payment details which will help the related departments to proceed further.
GST Details *	Enter the Bill details and GST Details

Please click on **SAVE** and subsequently **AUTHORISE**. After authorization system will lock the particular payment request. You can always Recall/Delete the transaction if there are any changes in the amount or any details before the Accounts section makes the Payment

12. REPORTS / DASHBOARDS:

- SFACTS provides many reports and dashboards which is quite interactive and intuitive. The same can be viewed with the respective module under **REPORTS** Menu. Here, the reports will be shown based on the role privileges given in the System.
- This section also indicates the UC (Utilization Certificate) & SoE (Statement of Expenditure) with updated formats as per the Funding Agency
- **Please note all the reports can be saved in PDF/EXCEL format.**

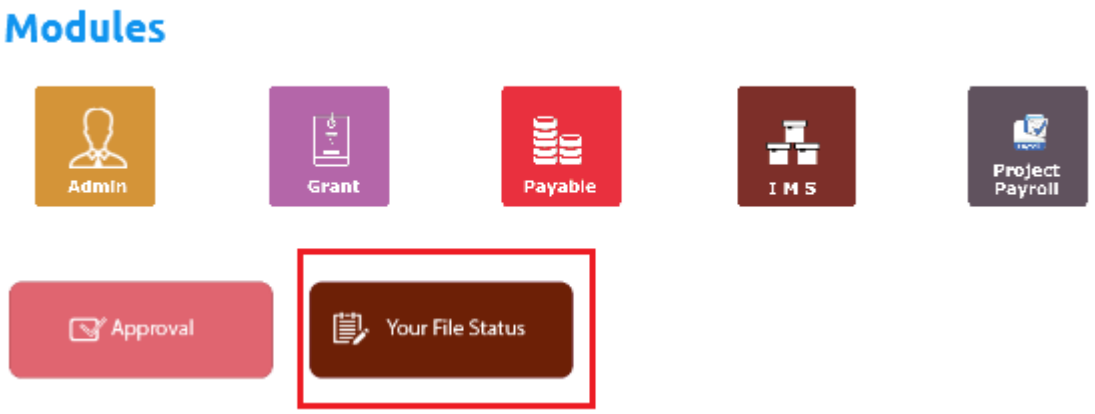
13. FILE STATUS OF YOUR TRANSACTIONS:

One of the unique and distinct features of SFACTS is its Approval Engine.

The product was designed and integrated with the hierarchical approval process with its Policy against each of the Transactions – be it Cash Advance Request; Purchase Indent process, etc.,

The objective is also to bring in the visibility of transactions and their current location/department electronically.

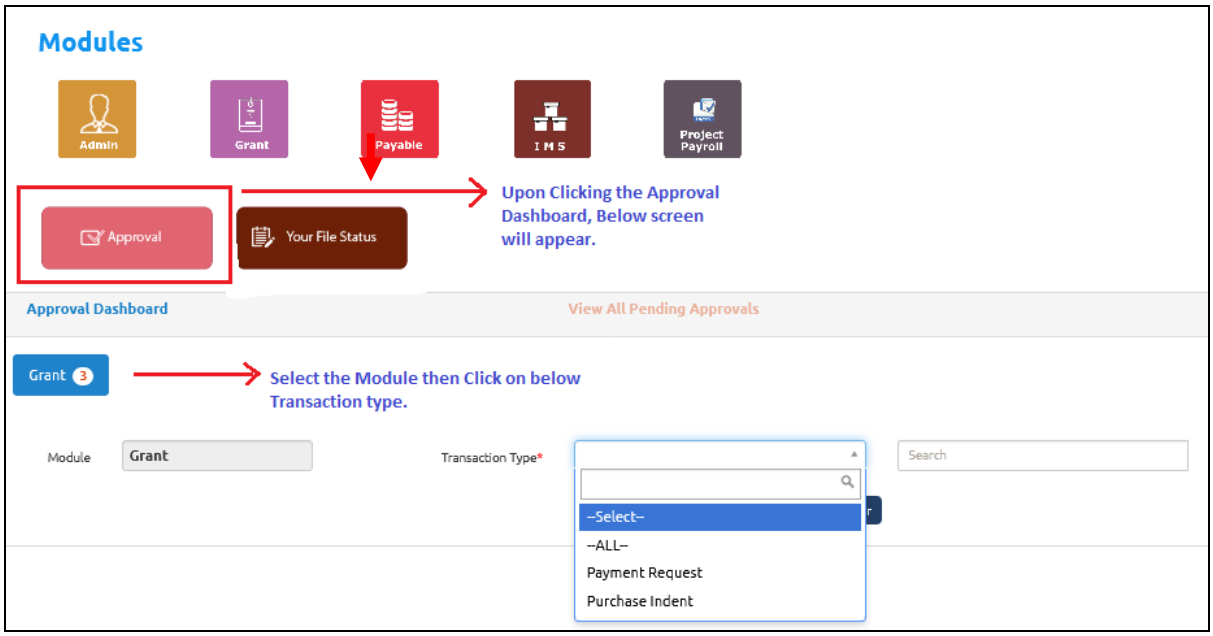
To review your transactions approval status, follow these steps:



From the **Home** screen, click on the respective icon under ***Your File Status*** menu to review the Approval Status of your respective transactions. Here, all the transactions will be displayed on the screen and as a user, you can select the specific date range to review the status.

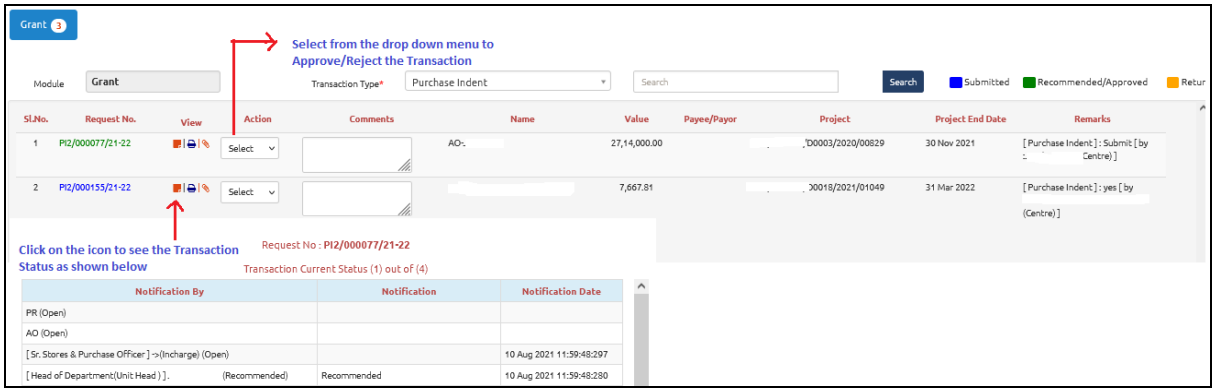
14. APPROVAL (Dashboard)

To know each of your transactions approval status, click on the Approval Status as shown below



Then select the appropriate Transaction Type under the drop-down and the system will display the pending transactions which are yet to Approve.

The typical screen will display the details as shown below:



In this example, we have shown the Transactions Pending for Approval for the Purchase Indent.

On selecting the Purchase Indent (under the Transaction Type), click on **View Notifications** and the system will show the current (On-Line) status of the Approval for the said transaction/request number with date and time stamp.

The same screen is available for every stakeholder in the Institution for their role/access rights

15. Common Features

SFACTS is provided with these common features across the application:

- **Proactive Email Alerts** for various stakeholders – Helps to take decisions appropriately.
- **Document Upload** facilities at various transactions. These can be retrieved by the respective authorities to review/save/print.
- **Project Records Upload** facilities (*To upload various projects related documents for the respective projects*) – Document repository – Easy Retrieval
- **Process Trail** – The system is enabled with a Process trail in many transactions which gives an overview of the transactions and their traces in a single window.
- **Project Assistant (PA) mapping** – This is another important facility provided in the system, which PI can utilize effectively. With this, the PI can assign their assistants to transact the respective projects with an independent login. However, the PI will have to "AUTHORIZE" transactions that were prepared by their assistants.
    - ***Please refer to the separate guide provided regarding the creation/mapping of the Project Assistants.***
- **Reports** can be seen on the screen, print, download to PDF/EXCEL format.
- **The search option** on various screens – Basic & Advanced search options have been provided in the System.

---------- End of Document ----------