

## Transfer Module In Audit Online Application

### Requirement

Auditors can be transferred from one location to another location.

- The transfer can happen within the state or outside of a state.
- Auditor can promote within the same office or location.
- New appointment in cases of any demise, retirement, or suspension

A functionality should be available with all checks and approval from the Creator or Admin.

### TRANSFER – IN THE MENU

- Transfer can be done either by State/Division/Regional/District admin as per the state opt hierarchy for the registered auditors.
- Parent user can grant the role for Transfer/Promotion/Retirement from the Assign role menu

<input type="checkbox"/>	Transfer/Promotion/Retirement/Others	This Module is used to perform Transfer/Promotion/Retirement/Others on user
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### APPROACH TO WORK ON FUNCTIONALITY INTRODUCED:

- 1. In case of Retirement/Demise:** Admin shall view the Transfer of User in menu, on selection of User and Reason as *Retirement/Demise*, Admin will be able to submit form, Internally the system will check whether user is registered using mail id or system generated Id. In both cases profile history will be created automatically and delete user(s) present profile.

In case of user is using mail Id as login then use login Id is replaced with system generated Id. A mail will be received by Admin (Parent User) with a new system generated Id. Furthermore, Admin will communicate the replacement of this USER ACCOUNT with a new ID and New user can proceed the work pending.

Steps to be followed:

- 1) Login as State/Division/Regional/District Admin with role of Transfer/ Promotion/ Retirement/ Others



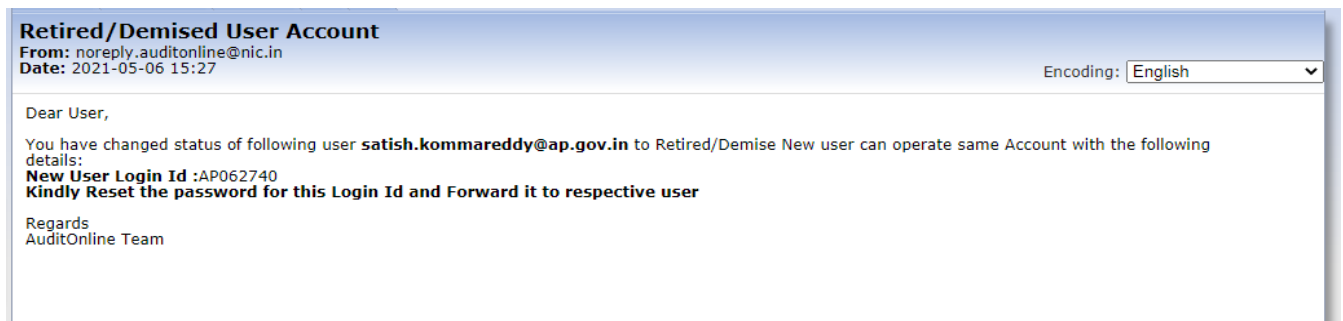
- 2) Go to Manage Employee Transfer >> Transfer User

Transfer/Promotion/Retirement of user	
Select User *	<input type="text" value="Select"/>
Reason of Relieving *	<input type="text" value="Select"/>

- 3) Select the user, reason for relieving as retirement/demise and click on the submit button.

4) After successful submission a message will be received.

5) Parent user will receive an email regarding his child user.



6) Now Admin will communicate the replacement of this USER ACCOUNT with a new ID and New user can Proceed the work pending.

2. **In case of Promotion/change in designation:** On selection of User and Reason as Change in Designation, admin will see a model of pending tasks with the user and it's up to admin to either ask user to clear his pending task(s) if any or Transfer task to auto populated for designated users in transfer to user combo (it will be populated on basis

of designation binded with process flow as well as part. After that Admin will be able to update designation of the user on location.

Transfer/Promotion/Retirement of user

Select User \*

Reason of Relieving \*

All the tasks should be transferred to the user of same designation before transferring it to the another location.

Note- User can be transferred only after transfer of pending tasks.  
 1- In case of Record Observation(task), the user must send out the task to next step, leaving no task in Inbox/draft before getting transferred.  
 2- In case the Administrator do not want to transfer the tasks further, it would require the user to manually complete all the tasks in Inbox.  
 3- 'Transfer to User' field in the below table populates the data on the basis of designation checked in the process flow tasks and the same designation present in the Audit Team.

S No.	Auditee Name	Task Name	Team Name	Transfer to User *
1	AMROHA-JOYA-Amroha Dehat	Record Intimation letter	Amroha Dehat Audit Team	--Select--
2	AMROHA-JOYA-Adalpur Taj	Record Intimation letter	twqwrqtgg	--Select--
3	AMROHA-JOYA-AHMADPUR DEVIPURA	Record Intimation letter	twqwrqtgg	--Select--
4	AMROHA-JOYA-ATAIRNA	Record Intimation letter	twqwrqtgg	--Select--
5	AMROHA-JOYA-Atrasi Kalan	Record Intimation letter	twqwrqtgg	--Select--
6	AMROHA-JOYA-Aurangabad	Record Intimation letter	twqwrqtgg	--Select--

Select the new designation of the selected user from the Designation drop down.

Transfer/Promotion/Retirement of user

Select User \*

Reason of Relieving \*

Change in Designation

Designation \*

**3) In case of Transfer:** On selection of User and Reason as Transfer, Admin will be prompted to pending Tasks if any. Now either Admin will ask the user to clear his pending task or if Admin will transfer the task to another user of the same designation (If the new user not present in team, in that case admin has to modify team with same designated user) and update the user active location with a new destination. **It is mandatory to choose designation** because designation code is not unique on LGD Level so if the designation name is the same but with different Igd codes then old location history and profile history will be saved in both cases. If a user is getting transferred from one state to another then in that case his system generated User Login Id will be changed after joining at a new location.

Transfer/Promotion/Retirement of user

Select User \*

Reason of Relieving \*

Choose Hierarchy for Transfer

Choose Unit \*  Inter State  Intra State

Choose Hierarchy \*  Inter Department  Intra Department

Move User To Destination office

Department Level *	Office Name *	Designation *
-- Select --	-- Select --	-- Select --

### **Joining of User at new location**

**TRANSFER TASK MODEL FUNCTIONALITY:** It is introduced in case of pending task need to be transferred before transfer of user with following condition:

- Task should only be transferred to the same designated user with part of the team if there is no such user present in the team then Team needs to be modified.
- If task need to be transferred to another designation than Admin can check process flow and modify process flow task with new designation.

**JOINING TRANSFERRED USER FUNCTIONALITY:** Joining of transferred user will be done by the new administrator where the user has been transferred. Details of previous location to new location admin user will be available, admin will approve the user for new location. If user was

transferred from other state and was using system generated ID there, in that case at the time of Approval for joining internally a new system generated id will replace the old one and user have to fill and verify his account again, this new Id will be sent to new admin at the time of Joining Approval.

if the user was earlier using its personal mail Id then verification and profile resubmission process not needed. After joining at a new destination, new admin will able to use this user as part of his audit team.

**Steps to followed:**

Transfer of user>> Manage employee transfer>> Joining User

Approval of transferred user							
Show 10 entries						Search:	
Sr.No.	User Login Id	Designation	Current Location	Transfer From Location	Transferred By	Transferred On	Action
							Approve
1	nicebalu221082@gmail.com	District Audit Officer	Office of District Audit Officer( DISTRICT - KRISHNA )	Office of District Audit Officer( DISTRICT - PRAKASAM )	parentuser2@yopmail.com	04-05-2021	
2	bkondalu1973@gmail.com	District Audit Officer	Office of District Audit Officer( DISTRICT - KRISHNA )	Office of District Audit Officer( DISTRICT - PRAKASAM )	parentuser2@yopmail.com	06-05-2021	

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

**Relieving Reason:** In relieving reason dropdown admin can view details of his transferred /retired/promoted user.

Transfer/Promotion/Retirement history of user	
Relieving Reason *	--Select--
<input type="button" value="Get Data"/> <input type="button" value="Close"/>	
<div style="border: 1px solid black; padding: 5px;"> --Select--  All  Transfer  Change in Designation  Retirement/Demise/Others </div>	