SDMS Short Term User Manual-Enrolment

PMKVY2.0

6th February, 2017
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Introduction

PMKVY2.0 - user manual for Enrolment.

Training Partner (TP) or Training Centre (TC) will be the users to operate the web portal in order to enrol the candidates.

Topics covered in the manual:

- Creating a Batch
- Viewing Open Batches
- Viewing Batch Approval Status

Creating a Batch

To create a batch:

1. Click Enrolment > Create Batch either on the menu bar or on the widget.
The Create Batch form is displayed.
2. Select the following fields appropriately:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheme</td>
<td>By default is PMKVY 2.0</td>
</tr>
<tr>
<td>Training Type</td>
<td>Dropdown values are displayed</td>
</tr>
<tr>
<td>Sector</td>
<td>Dropdown values are displayed</td>
</tr>
<tr>
<td>Sub-Sector</td>
<td>Dropdown values are displayed</td>
</tr>
<tr>
<td>Job Role</td>
<td>Dropdown values are displayed</td>
</tr>
<tr>
<td>• Target Available</td>
<td>Maximum number of candidates that can be enrolled</td>
</tr>
<tr>
<td>• Eligible to Create Batch</td>
<td>Maximum number of batches that can be created</td>
</tr>
<tr>
<td>• Registered yet to be enrolled</td>
<td>Total number of registered candidates</td>
</tr>
<tr>
<td>• Enrolled So Far</td>
<td>Number of candidates enrolled so far</td>
</tr>
<tr>
<td>• Category</td>
<td>Category for selected job role</td>
</tr>
<tr>
<td>• Job Role Duration in Hours</td>
<td>Total training hours</td>
</tr>
<tr>
<td>• Assessment Fee per Candidate</td>
<td>Amount of fee for an individual candidate</td>
</tr>
<tr>
<td>• Minimum batch size</td>
<td>Minimum number of candidates to be enrolled for batch approval</td>
</tr>
<tr>
<td>• Maximum batch size</td>
<td>Maximum number of candidates to be enrolled for batch approval</td>
</tr>
<tr>
<td>• Minimum Hours of Training per Day</td>
<td>Minimum hours of batch training per day</td>
</tr>
<tr>
<td>• Base Cost per Candidate per Hour</td>
<td>Base cost of training for a candidate per hour</td>
</tr>
<tr>
<td>• Maximum Days allowed for Allowance</td>
<td>Maximum days permitted for conveyance allowance</td>
</tr>
<tr>
<td>• Maximum Days allowed for Allowance (Boarding and Lodging))</td>
<td>Maximum days permitted for boarding/lodging allowance</td>
</tr>
<tr>
<td>Training Hours per Day</td>
<td>Dropdown values are displayed</td>
</tr>
<tr>
<td>Batch Start Date</td>
<td>By default, the batch start date is set to current date + 6 days. Training Centre (TC) can modify the date.</td>
</tr>
<tr>
<td>Batch End Date</td>
<td>By default, the batch end date is auto populated based on Batch Start Date and Min Hours of Training hour. TC can modify the date.</td>
</tr>
<tr>
<td>Preferred Assessment Date</td>
<td>By default, the field is blank. The Preferred Assessment Date must be within 90 days from Batch End Date.</td>
</tr>
<tr>
<td>Search/Add Trainer</td>
<td>Search and add the trainer according to the trainer availability</td>
</tr>
<tr>
<td>Remarks for SSC</td>
<td>The field is optional and comment/remarks can be entered in the text area.</td>
</tr>
<tr>
<td>Enrolment Closure Date</td>
<td>The closure date for batch enrolment.</td>
</tr>
</tbody>
</table>

**Note:**

- If TC doesn’t have candidates ready for enrolment, **Batch Start Date** must be set to more than min date allowed to post pone the **Enrolment Closure Date**.

- For conveyance, the allowance amount is calculated based on training hours per day. (Formula: Round off **Job Role Duration/Training Hours Per Day**)

- For Boarding/ Lodging, the allowance amount is calculated based on training hours per day. (Formula: Round off ((**Job Role Duration/40**)7)+2)

3. Click **Save** to save the batch. The batch approval status is set to **Open**.

4. Click **Cancel** to cancel/ clear the values.

**Note:**

- The Items marked with **Asterisk (*)** are mandatory fields.
- User must follow the **top to bottom** sequence while selecting the dropdown fields.
1. **To Search/Add a trainer.**

![Image of trainer search add interface]

2. **Click Plus (+) Sign to add or search the trainer.**

![Image of search trainer interface]

3. **Enter the trainer name and click Search in order to select the trainer who is already in the list.**
4. Select the trainer and click **Add Trainer To Batch**.

5. In order to add a new trainer to the list click **Create New Trainer**.
6. Add the new trainer details and click **Save**.

![Image of Trainer Detail Form]

**Name**: First, Middle & Last Name

**Gender**: Select

**Aadhaar Number**: Enter Aadhaar Number and verify

**Alternate ID**: Select Alternate ID

**Alternate ID No.**: Enter Alternate ID Number

**Mobile Number**: Enter Mobile Number and generate or enter CTP

**Mobile CTP Verification Status**: Not Provided

**Email Address**: Enter Email Address

**Certification No. or Certified**: Enter Certification Number or Certified
View Open Batches

To view open batches:

1. Click **Enrolment > View Open Batches** either on the menu bar or on the widget.

The View Open batch form is displayed.
2. Select the following mandatory dropdown fields in the correct sequence:
   - Scheme
   - Training Type
   - Sector
   - Sub-Sector
   - Job Role

3. Based on the dropdown fields, the following fields is displayed:
   - Job Role Info: Job role duration and minimum and maximum size of the batch.
   - Target Info: target available, candidates who are registered but yet to be enrolled, and enrolled so far.

   **Note:** Batches with batch approval status – **Open** is displayed for the selected dropdown values.
4. Next, select the batch and perform the desired operation:

- **Enrol Candidate**: the button is disabled if enrolment closure date is elapsed.

- **Send Batch for Sector Skill Council (SSC) Approval**: The button is enabled if minimum batch size is met and enrolment closure hasn’t been elapsed. Batch Approval status is set as Sent to SSC Approval.

- **Edit Batch**: TC can edit a selected batch. Properties that can be edited are **Batch Start Date, Batch End Date, Assessment Date, Trainer, and Remarks**. TC has to mandatorily edit the batch to postpone the enrolment closure date.

- **Download PDF**: TC can download the candidate details in PDF format by clicking the radio button.

- **Create Batch**: TC can create a new batch

**Note:**

- Create Batch is available only for the next release.
- If the enrolment closure date for a batch is elapsed, then the batch is marked in RED.
- Post enrolment closure date, if minimum batch size is met, the batch is auto-sent to Sector Skill Council (SSC) for approval.
Enrol Candidates
Candidates can only be enrolled if enrolment closure date is not elapsed.

1. Select the candidate and click Enrol Candidates

![Enrol Candidates](image)

<table>
<thead>
<tr>
<th>Batch Name</th>
<th>Batch Start Date</th>
<th>Batch End Date</th>
<th>Preference Assessment Date</th>
<th>Enrolment Closure Date</th>
<th>Trainer</th>
<th>Enrolled So Far</th>
<th>Remaining</th>
<th>Batch Approval Status</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batches 1/2</td>
<td>31-Jan-2017</td>
<td>29-Jan-2017</td>
<td>27-Jan-2017</td>
<td>27-Jan-2017</td>
<td>Prasad</td>
<td>0</td>
<td>50</td>
<td>Open</td>
<td>Open</td>
</tr>
<tr>
<td>Batches 3/4</td>
<td>01-Dec-2016</td>
<td>01-Dec-2016</td>
<td>30-Nov-2016</td>
<td>30-Nov-2016</td>
<td>Roop</td>
<td>0</td>
<td>50</td>
<td>Open</td>
<td>Open</td>
</tr>
<tr>
<td>Batches 5/6</td>
<td>01-Jan-2017</td>
<td>01-Jan-2017</td>
<td>04-Dec-2016</td>
<td>04-Dec-2016</td>
<td>Ramesh</td>
<td>2</td>
<td>28</td>
<td>Open</td>
<td>Open</td>
</tr>
</tbody>
</table>
2. **Enrol Candidate** form is displayed with the following information:

- **Job Role Details**: Scheme, training type, sector, sub sector, job role, and job role duration in hours.

- **Batch Details tab**: Batch start date, batch end date, preferred assessment date, trainer, enrolled so far, enrolment remaining, enrolment closure date and target available.
  - Enrolled So Far: Number of candidates enrolled
  - Enrolment Remaining: Number of candidates that need to be enrolled.
3. To enrol candidates to the selected batch, select the candidates from **Registered Candidate** table and click **Enrol to Batch**. Candidates are moved to **Enrolled Candidate** table (select all candidates using select all check box).

**Note:** Candidates whose Eligible for Enrolment = Yes and Mobile Number Exists in System? = No are eligible to enrol.

Candidate names are displayed in red if Eligible for Enrolment <> Yes or Mobile Number Exists in System? <> No

4. Candidates can be removed from a batch by selecting required candidate in Enrolled Candidate table and clicking **Remove from Batch**. Candidates are moved back to Registered Candidate table.
Send Batch to SSC Approval

Send Batch to SSC Approval button is enabled if minimum batch size is met and enrolment closure date has not been elapsed. Batch Approval status is set as Sent to SSC Approval.

Note:

- Post Enrolment Closure Date, if min batch size is met, batch is auto sent to SSC for approval.
- After the batch is sent for SSC approval, it can be viewed in View Batch Approval Status page.
Edit Batch
If **Enrolment Closure Date** is elapsed (i.e. Batch displayed in red colour), TC has to mandatorily edit the batch to postpone the **Enrolment Closure Date**.

In **View Open Batches** select the candidate and click **Edit Batch**.

Properties that can be edited are **Batch Start Date**, **Batch End Date**, and **Assessment Date**. After the batch is edited click **Save**.
View Batch Approval Status

To view batch approval status:

1. Click **Enrolment > View Batch Approval Status** either on the menu bar or on the widget.

View Batch Approval Status form is displayed.
2. Select the appropriate Batch Status from the dropdown list:
   - Approved
   - Rejected
   - On Hold
   - Sent to SSC for Approval

Note: If Batch Status = Approved, then batches which are yet to be started (i.e. current date less than batch start date) is displayed.
3. Select the batch and click either View Enrolled Candidates to view the list or Download Enrolled Candidate to download the list.