



# **TATA CONSULTANCY SERVICES**

## **User Manual for Loan and Advances IGNOU**



# Loans and Advances

## Navigation:

Portal → Launch HCM Application → Self Service → Loans & Advances

## 2. Loans & Advances Request

### Navigation:

Launch HCM Application → Self Service → Loans & Advances → Raise Loan Request

### Tab1: Find an Existing Value

**Find an Existing Value:** You can search the existing Loan by using the one of the following different searching criteria i.e.

1. **EmpID:** shows the employee id of logged in user.
2. **Loan Id:** You can search the existing Loan by entering the Loan Id.
3. **Type of Loan:** You can also search the existing Loan by entering the types of loans are listed below.

- a) Festival Advance
- b) Moped Advance
- c) Motor Cycle Advance
- d) Motor Car Advance
- e) Personal Computer Advance
- f) Scooter Advance

**ODL Soft**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help

### Loan Requisition Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

EmpID: 1133

Loan ID: begins with [ ]

Type of Loan: = [ ]

Case Sensitive

Search | Clear | Basic

Find an Existing Value | Add a New Value

**A. Enter the Loan Id**

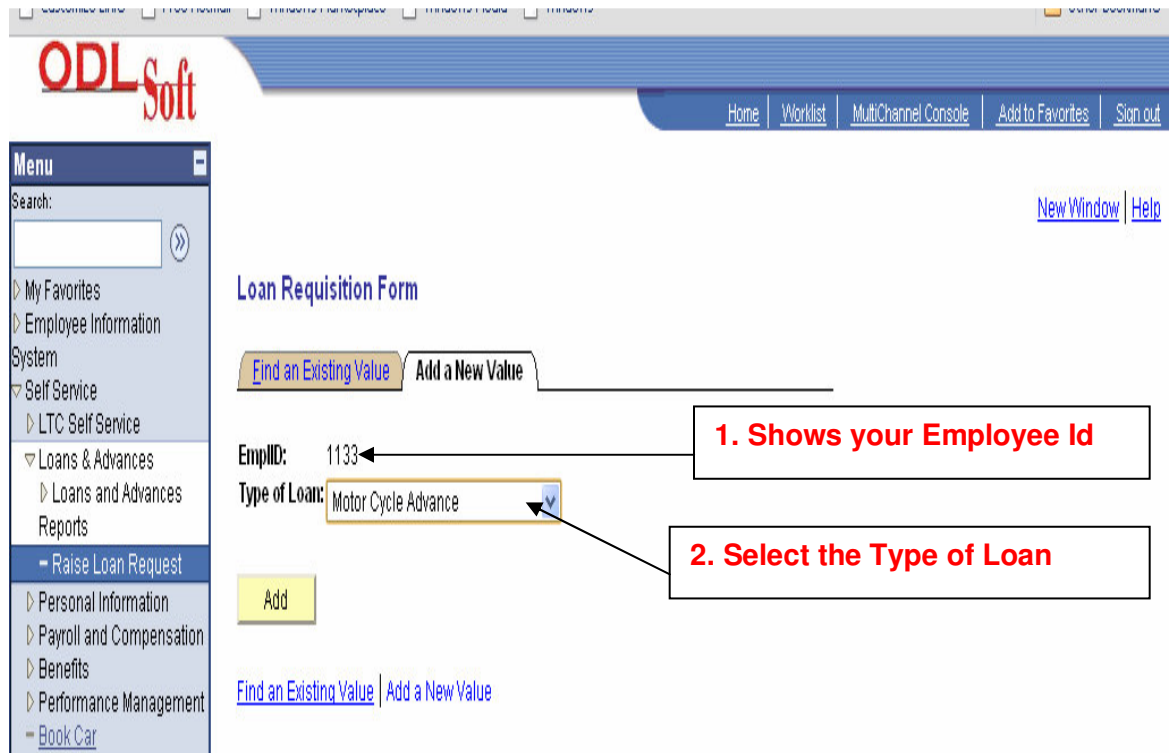
**B. Select the type of Loan**

# Loan Requisition

## Tab2: Add a New Value

Click on the **Add a New Value Tab**

1. Shows your employee id
2. Click on Add button



## 2. After Clicking the ADD button

### A. Shows Employee Details

3. When you apply for a Loan in that case Loan ID status always be as 'NEW' as below.

**ODL-Soft**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

**Apply for Loans & Advances**

**Employee Details**

EmpID:	1133	V.K. MALHOTRA
Designation:	SSE	
Basic Salary:	51440	GradePay: 8800
Date of retirement:	30/06/2013	Date Of Birth: 17/06/1953
Loan ID:	NEW	

**3. Loan ID as 'New'**

## B. Loan details

4. Enter the Amount of Loan required
5. Enter the number of installment to be repaid.

**Loan Details**

Type of Loan: Motor Cycle Advance

Loan Amount Required: 50000

Installments to be Repayed: 50

**4. Enter the Loan amount required**

**5. Enter the number of Installment to be repaid**

## Vehicle/Computer details

6. Select the type of vehicle/Computer i.e. OLD/NEW
7. Enter the name of the vehicle/Computer manufacturing company as shown in below screen shot.
8. Enter the Model name and cost of the Vehicle/Computer respectively
9. Select the FC-4 form as Yes
10. Enter the remarks if any
11. Select the terms and condition checkbox and click on submit button for the submission of loan request as shown in below page

**6. Select the type of vehicle i.e. OLD/NEW**

**7. Enter the name of the vehicle/computer manufacturing company**

**8. Enter the Model and cost of the vehicle/computer**

**9. Select the FC-4 Form as Yes**

**10. Enter the remarks if any**

**11. Select the terms and Conditions check box and click on Submit button**

The screenshot shows a web application interface with a sidebar menu on the left containing items like 'Loans and Advances Reports', 'Raise Loan Request', 'Inmate Pension', 'Transport for Staff Children', 'Employee House Requests', 'Review Transactions', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', 'Worklist', 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Vehicle/Computer details' and includes a 'Type of vehicle' section with radio buttons for 'OLD' and 'NEW'. Below this are input fields for 'make: BAJAJ', 'MODEL: Pulsar', and 'Cost: 64000'. An 'FC-4 details' section has radio buttons for 'Submitted FC-4 Form' with 'Yes' selected. A 'Remarks' section contains a text area with a pre-filled disclaimer. At the bottom, there is an 'I Agree' checkbox, a 'Submit' button, and other buttons like 'Notify', 'Add', and 'Update/Display'.

## After Submitting the Loan request

12. After submission of request a pop is populate to intimate for the submission of necessary documents based on the type of loan request as shown in below screen shot
13. Click on OK button

The screenshot shows the ODL Soft application interface. A popup window titled "The page at imsuat.odlsoft.com:8765 says:" is displayed over the "Apply for Loans & Advances" page. The popup contains the following text:

Loan Rebate Scheme (25000,206) To avail a rebate of 2.5% over the standard rate of interest after the purchase of Computer/Motor/Scooter, please submit the following documents within 1 month from the date of loan withdrawal for any of the following:-

- A) Computer :
  - 1) Cash Receipt
  - 2) Mortgage Deed
- B) Scooter :
  - 1) Cash Receipt
  - 2) Insurance Copy
  - 3) Registration certificate
- C) Car :
  - 1) Cash Receipt
  - 2) Insurance Copy
  - 3) Registration Certificate
  - 4) Mortgage Deed

An "OK" button is visible at the bottom of the popup. Two red callout boxes with arrows point to the popup and the OK button, containing the text: "12. After the submission of request a popup populates to intimate for the submission of necessary documents based on the type of Loan request" and "13. Click on ok Button".

**Note: - After clicking on the Ok button the Popup details also populate below your Loan request details**

The screenshot shows the ODL Soft application interface. The "Remarks" section contains the text: "Please approve". Below the remarks section, there is a section titled "Certified that I have not taken delivery of any computer/motor cycle/motor car/scooter on account of which I have applied for the advance and I shall complete negotiations for the purchase of vehicle and pay finally and take possession of the motor cycle/motor car/scooter within one month from the date of the drawal of the advance and that I shall ensure it from the date of taking delivery of it." Below this text, there is a checkbox labeled "I Agree" which is checked, and a "Submit" button. The "Loan Trans Date/Time" is displayed as "10/11/2010 12:51:45PM". Below the "Submit" button, there is a section titled "To avail a rebate of 2.5% over the standard rate of interest after the purchase of Computer/Motor/Scooter, please submit the following documents within 1 month from the date of loan withdrawal for any of the following:-". Below this text, there is a list of required documents for different loan types:

- A) Computer :**
  - 1) Cash Receipt
  - 2) Mortgage Deed
- B) Scooter :**
  - 1) Cash Receipt
  - 2) Insurance Copy
  - 3) Registration certificate
- C) Car :**
  - 1) Cash Receipt
  - 2) Insurance Copy
  - 3) Registration Certificate
  - 4) Mortgage Deed

At the bottom of the page, there is a section titled "Loan Rebate Scheme".

14. After the submission of loan request ,loan id is generated as shown below

The screenshot displays the ODL Soft web application interface. At the top left is the ODL Soft logo. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. On the right side, there are links for New Window, Help, and Customize Page. A left-hand menu is visible, with 'Raise Loan Request' highlighted. The main content area is titled 'Apply for Loans & Advances' and contains an 'Employee Details' section. The details are as follows:

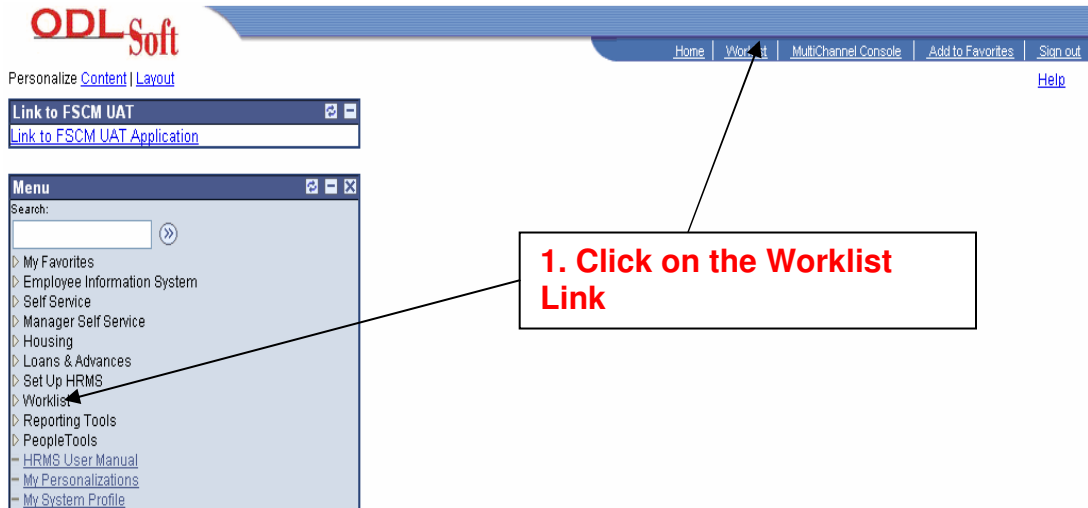
EmpID:	1133	V.K. MALHOTRA
Designation:	SSE	
Basic Salary:	51440	GradePay: 8900
Date of retirement:	30/06/2013	Date Of Birth: 17/06/1953
Loan ID:	1005	

A red-bordered box with the text '14. After submission of request, Loan ID is generated' is positioned over the Loan ID field, with an arrow pointing to the value '1005'.

## Approval Process:-

After submission of the loan request by the user, the request is submitted in the worklist of First approver for the approval process as shown below.

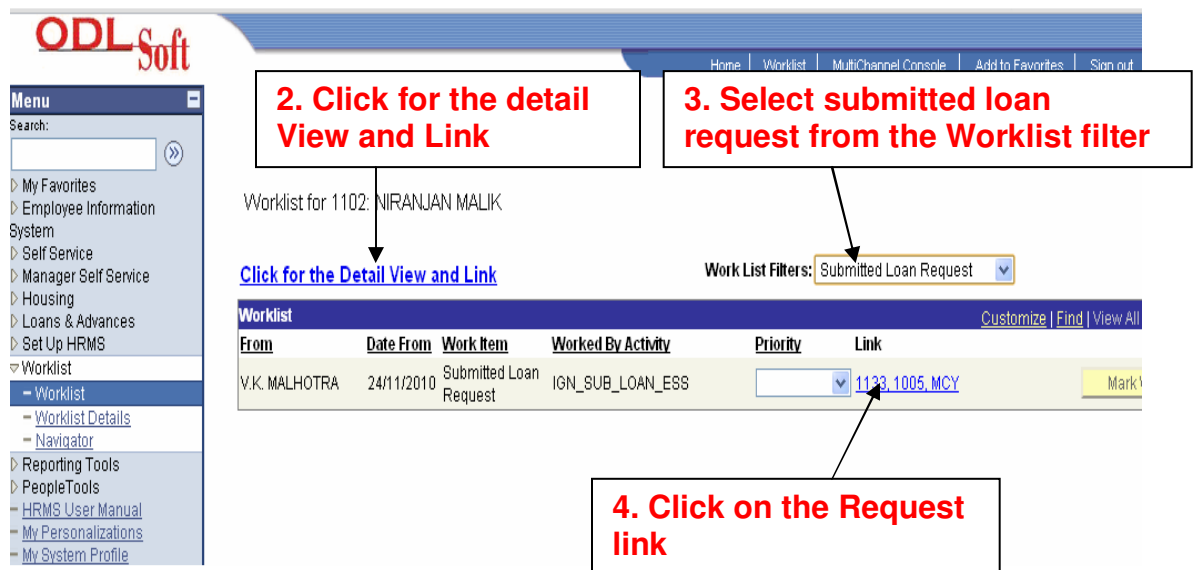
1. Click on the on the worklist list link to open the request as shown below



2. Click for the detail view and link as shown in below screen

3. To open the Loan request choose Submitted loan request from the worklist filter

4. Find the required request number and click on the link to open the request for approval





## After clicking on the Request number link

### Employee details:-

5. Click on the Approve loan request tab for the details, shows the employee details and loan details filled by the requestor

**5. Click on the Approve Loan Request Tab**

**Shows the Payroll status as Not Approved and Sanction status as pending**

**Shows the Required loan details**

**ODL Soft**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Menu

Search:

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Loans & Advances
- Set Up HRMS
- Worklist
  - Worklist
  - Worklist Details
  - Navigator
- Reporting Tools
- PeopleTools
- HRMS User Manual
- My Personalizations
- My System Profile
- My Dictionary

Raise Loan Request | **Approve Loan Request**

### Worksheet for Loan Approval

Employee Details			
EmpID:	1133 V.K. MALHOTRA		
Designation:	SSE	GradePay:	8900
Basic Salary:	51440	Date Of Birth:	17/06/1953
Date of retirement:	30/06/2013	Payroll Approved:	Not Approved
Loan ID:	1005	Sanctioned Status:	Pending

Repayment Details	
Type of Loan:	Motor Cycle Advance

Required Loan Details			
Loan Amount Required:	50000	Desired Installments:	50

\*There are no previous loans availed

## For sanction Loan please refer below Screen

### Sanctioned Loan Details:-

6. Enter the Sanctioned loan amount
7. Enter the number of installment
8. click on the Calculate Principle installment Amount button
9. After clicking the button it shows the Monthly amount and last installment if any
10. Enter the number of installments in interest details as shown in below screen shot
11. Set the loan period
12. Enter the remarks if any and click on Approve button for the approval of request

**Note: - If approver not finds the request according to the terms and conditions, it can be rejected by clicking on the reject button by the approver as shown in below screen**

The screenshot shows the 'Sanctioned Loan Details' form with the following fields and callouts:

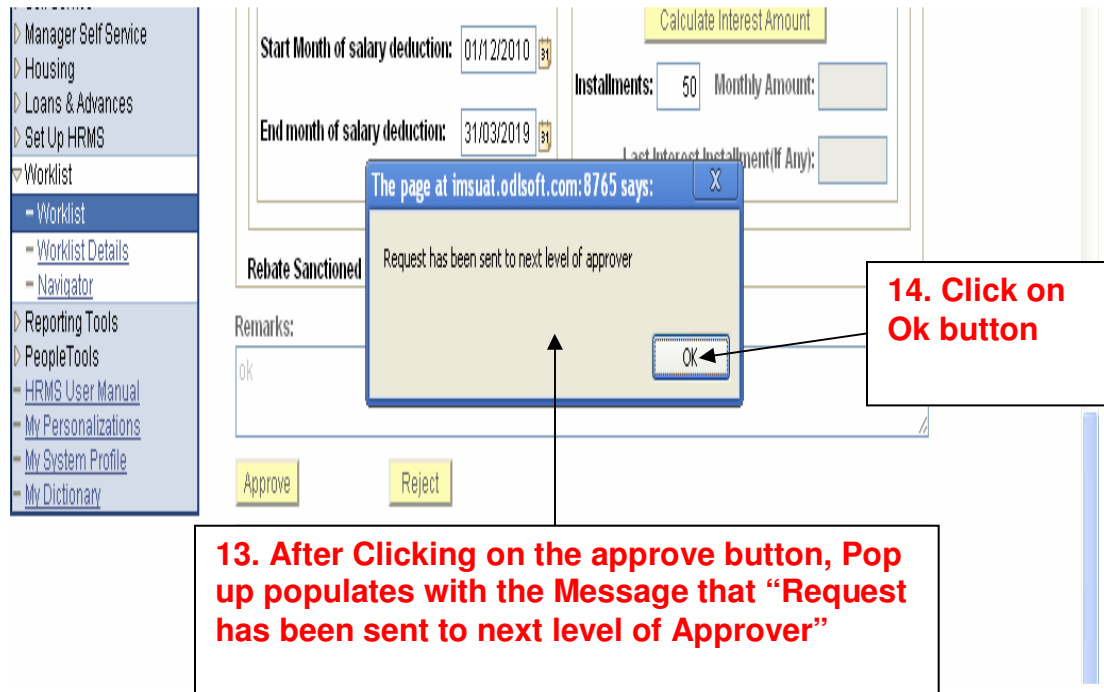
- 6. Enter the Sanctioned Loan amount**: Points to the '\*Sanctioned Loan Amount' field containing '50000'.
- 7. Enter the Number of installments**: Points to the 'Installments' field in the 'Principle Details' section containing '50'.
- 8. After entering the installment, click on the Principle Installment amount button**: Points to the 'Calculate Principle Installment Amount' button.
- 9. After clicking the button it shows the monthly amount and the Last installment**: Points to the 'Monthly Amount' (1000.00) and 'Last Installment(if any):' (1000.00) fields.
- 10. Enter the number of installment in the Interest Details**: Points to the 'Installments' field in the 'Interest Details' section containing '50'.
- 11. Enter the Start Month of salary deduction**: Points to the 'Start Month of salary deduction' field containing '07/02/2010'.
- 12. Enter the remarks and Click on Approve button**: Points to the 'Remarks' field containing 'ok' and the 'Approve' button.
- If any problem, request can also be cancelled by clicking on the reject button**: Points to the 'Reject' button.

The 'Approval History' table at the bottom shows:

Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok

13. After the approval of first approver a popup is populate with the message "Request has been sent to next level of approver"

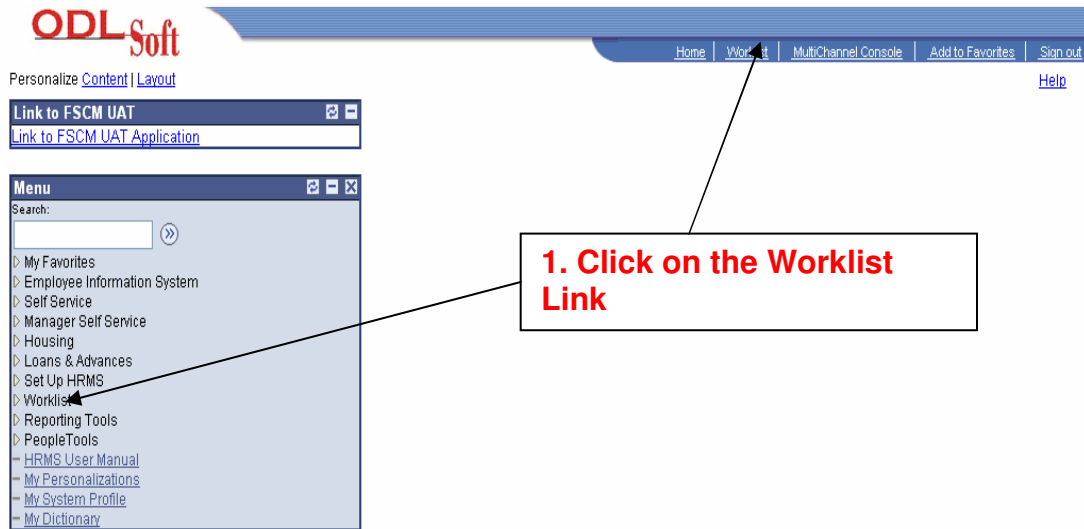
**14. Click on Ok button**



**Next Level of Approval**

After submission of the loan request by the user, the request is submitted in the worklist of First approver for the approval process

**1. Click on the worklist link to open the request after the first approval**



**2. Click for the detail view and link as shown below screen shot**

**3. To open the Loan request choose Loan approval worklist from the worklist filter**

4. Find the required request number and click on the link to open the request submitted by the first approver

**2. Click for the detail View and Link**

**3. Select loan Approval Worksheet from the Worklist filter**

**4. Click on the Request link**

Worklist for 1720: VIDYA SONAL

Click for the Detail View and Link

Work List Filters: Loan Approval Worksheet

From	Date From	Work Item	Worked By Activity	Priority	Link
NIRANJAN MALIK	24/11/2010	Loan Approval Worksheet	IGN_WORKSHEET		1133.1005.MCY

Shows Employee details

5. Click on the Approve loan request tab for the details, shows the employee details and loan details filled by the requestor

**5. Click on the Approve Loan Request Tab**

**Shows the Payroll status as Not Approved and Sanction status as Processing**

**Shows the Required loan details**

Worksheet for Loan Approval

Employee Details

EmpID:	1133	V.K. MALHOTRA	GradePay:	8900
Designation:	SSE		Date Of Birth:	17/06/1953
Basic Salary:	51440		Payroll Approved:	Not Approved
Date of retirement:	30/06/2013		Sanctioned Status:	Processing
Loan ID:	1005			

Repayment Details

Type of Loan: Motor Cycle Advance

Required Loan Details

Loan Amount Required:	50000	Desired Installments:	50
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\*There are no previous loans availed

Below screen shows the sanctioned loan details filled at first level of approval

6. Enter the remarks
7. click on Approve button

**Note: - If approver not finds the request according to the terms and conditions, it can be rejected by clicking on the reject button and can be send back to first level of approver by the second level of approver as shown in below screen**

The screenshot displays the 'Sanctioned Loan Details' form. On the left is a navigation menu with options like 'My Favorites', 'Employee Information', 'System', 'Self Service', 'Manager Self Service', 'Housing', 'Workforce Administration', 'Loans & Advances', 'Workforce Development', 'Organizational Development', 'Set Up HRMS', 'Worklist', 'Worklist Details', 'Navigator', 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main form contains several sections: 'Sanctioned Loan Amount' with a value of 50000; 'Principle Details' with 'Calculate Principle Installment Amount' button, 'Installments: 50', 'Monthly Amount: 1000.00', and 'Last Installment(if any): 1000.00'; 'Set Loan Period' with 'Start Month of salary deduction: 01/12/2010' and 'End month of salary deduction: 31/03/2019'; and 'Interest Details' with 'Calculate Interest Amount' button, 'Installments: 50', 'Monthly Amount:', and 'Last Interest Installment(if Any):'. Below these is a 'Rebate Sanctioned' checkbox. A 'Remarks:' field contains the text 'ok'. At the bottom of the form are three buttons: 'Approve', 'Send Back', and 'Reject'. Below the form is an 'Approval History' table with columns 'Worked By', 'Name', 'Action', 'Date/Time', and 'Comments'. The table shows two entries: one by V.K. MALHOTRA (Submitted) and one by NIRANJAN MALIK (Forwarded). At the bottom of the page are 'View Worklist' and 'Notify' buttons, and a footer with links 'Raise Loan Request' and 'Approve Loan Request'. Three red callout boxes with arrows point to specific elements: one to the 'Sanctioned Loan Amount' field, one to the 'Approve' button, and one to the 'Send Back' button.

**Shows the sanctioned loan details filled at first level of Approval**

**6. Enter the remarks**

**7. Click on Approve button**

**If any problem, Request can be send back to second approver or can be rejected accordingly**

View Worklist | Notify

[Raise Loan Request](#) | [Approve Loan Request](#)

8. After the approval by the second level of approver a popup is populate with the message "Request has been sent to next level of approver"
9. Click on Ok button

**8. Click on Ok button**

**9. After Clicking on the approve button, Pop up populates with the Message that Request has been sent to next level of Approver**

**Sanctioned Loan Details**

\*Sanctioned Loan Amount: 50000

Principle Details: Calculate Principle Installment Amount

Installments: 50 Monthly Amount: 1000.00

Last Installment(if any): 1000.00

Set Loan Period: Start Month of salary, End month of salary

Rebate Sanctioned

Remarks: ok

Approve Send Back Reject

Approval History				
Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok

## Final Level of Approval

After submission of the loan request by the user, the request is submitted in the worklist of First approver for the approval process.

1. Click on the worklist link to open the request submitted by the second level of approver

**ODL Soft**

Home Worklist MultiChannel Console Add to Favorites Sign out Help

Personalize Content Layout

Link to FSCM UAT  
Link to FSCM UAT Application

Menu

Search:

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Loans & Advances
- Set Up HRMS
- Worklist
- Reporting Tools
- PeopleTools
- HRMS User Manual
- My Personalizations
- My System Profile

**1. Click on the Worklist Link**

2. Click for the detail view and link as shown below screen shot
3. To open the Loan request choose Loan approval worksheet from the worklist filter
4. Find the required request number and click on the link to open the request submitted by second level of approver

**2. Click for the detail View and Link**

**3. Select loan Approval Worksheet from the Worklist filter**

Worklist for 1495: RADHA LAKHWANI

Click for the Detail View and Link

Work List Filters: Loan Approval Worksheet

From	Date From	Work Item	Worked By Activity	Priority	Link
VIDYA SONAL	24/11/2010	Loan Approval Worksheet	IGN_WORKSHEET		1133_1005_MCY

**4. Click on the Request link**

## Employee details

5. Click on the “Approve loan request tab” for the details, shows the employee and loan details filled by the requestor

Shows the Employee and required loan details as below

**5. Click on the Approve Loan Request Tab**

Shows the Payroll status as Not Approved and Sanction status as Processing

**Worksheet for Loan Approval**

**Employee Details**

EmpID:	1133	V.K. MALHOTRA	GradePay:	8900
Designation:	SSE		Date Of Birth:	17/06/1953
Basic Salary:	51440		Payroll Approved:	Not Approved
Date of retirement:	30/06/2013		Sanctioned Status:	Processing
Loan ID:	1005			

**Repayment Details**

Type of Loan: Motor Cycle Advance

**Required Loan Details**

Loan Amount Required:	50000	Desired Installments:	50
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There are no previous loans availed

**Shows the Required loan details**

**Below screen shows the sanctioned loan details filled at first level of approval**

6. Enter the remarks
7. click on Approve button

**Note: - If approver not finds the request according to the terms and conditions, it can be rejected by clicking on the reject button and can be send back to second level of approver by the final level of approver as shown in below screen**

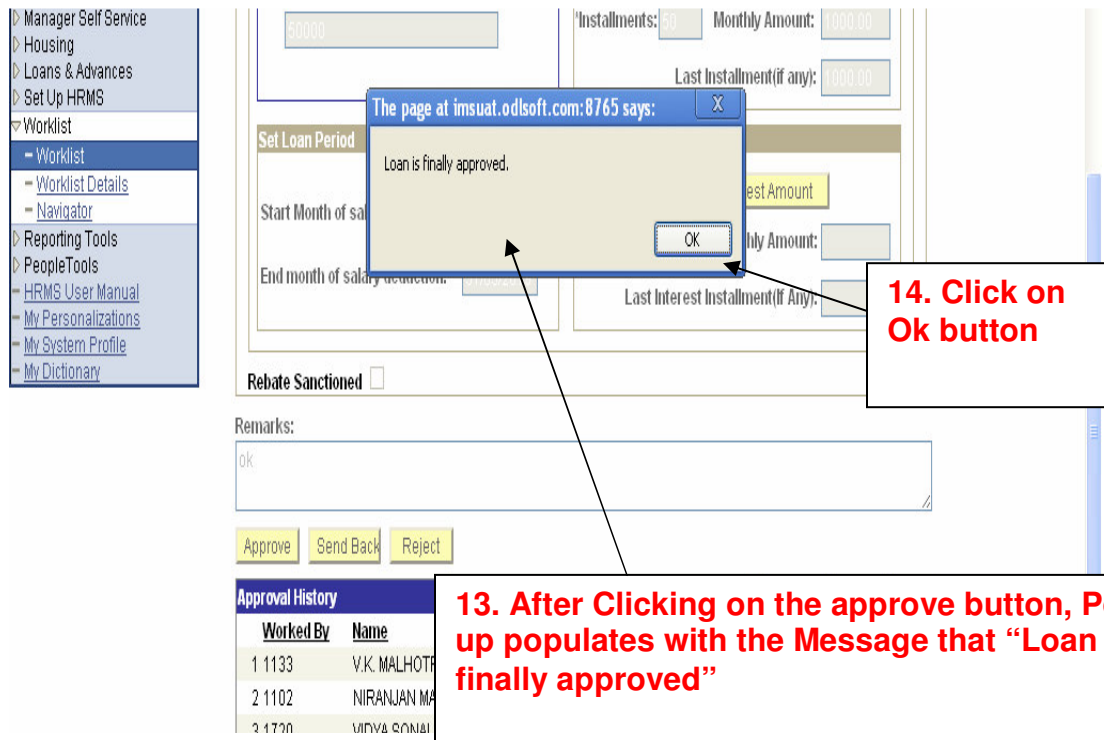
The screenshot displays the 'Sanctioned Loan Details' form. The left sidebar contains a navigation menu with options like 'My Favorites', 'LTC', 'Employee Information System', 'Self Service', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', 'Worklist', 'Worklist Details', 'Navigator', 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main form area is divided into several sections: 'Sanctioned Loan Amount' (with a value of 50000), 'Principle Details' (with 'Calculate Principle Installment Amount' button, 'Installments: 60', 'Monthly Amount: 833.33', and 'Last Installment(if any): 833.33'), 'Set Loan Period' (with 'Start Month of salary deduction: 01/12/2010' and 'End month of salary deduction: 31/03/2019'), and 'Interest Details' (with 'Calculate Interest Amount' button, 'Installments: 60', 'Monthly Amount: 833.33', and 'Last Interest Installment(if Any):'). Below these sections is a 'Rebate Sanctioned' checkbox. A 'Remarks' field contains the text 'ok'. At the bottom of the form are three buttons: 'Approve', 'Send Back', and 'Reject'. Below the form is an 'Approval History' table with the following data:

Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:45PM	ok

Callouts provide instructions: 'Shows the sanctioned loan details filled at first level of Approval' points to the form fields; '6. Enter the remarks' points to the Remarks field; '7. Click on Approve button' points to the Approve button; and 'If any problem, Request can be send back to second level of approver or can be rejected accordingly' points to the Send Back and Reject buttons.

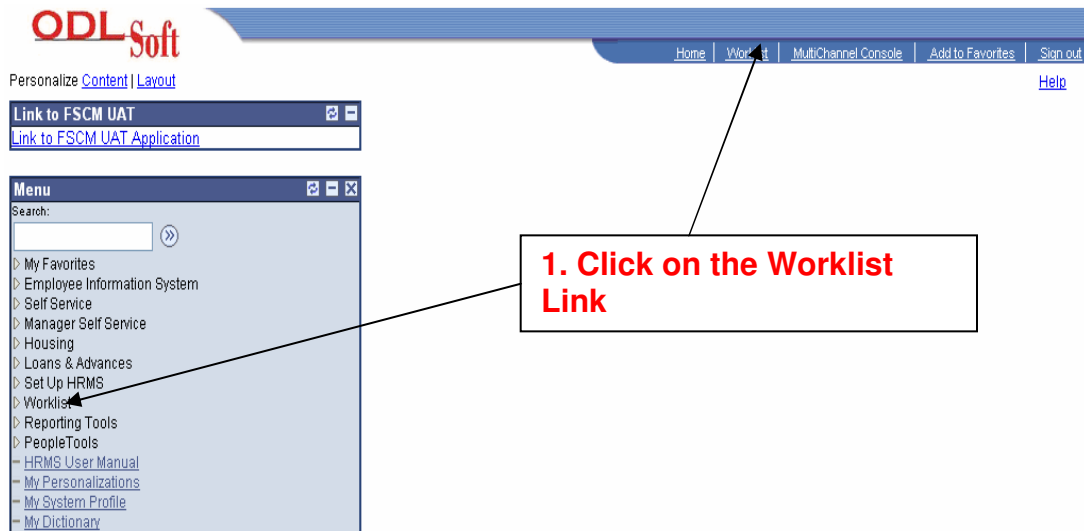
8. After the approval by the second level of approver a popup is populates with the message "Loan is finally approved"
9. Click on Ok button





**Note: - After the final approval of loan, expense sheet is created by the first level of approver .Request is submitted in the worklist of first approver as shown below**

**1. Click on the worklist link to open the request submitted after the final approval of loan for the creation of Expense sheet**



**2. Click for the detail view and link as shown below screen shot**

**3. To open the Loan request choose Loan approval worklist from the worklist filter**

4. Find the required request number and click on the link to open the request again submitted after the final approval of loan by the last level of approver

**2. Click for the detail View and Link**

Worklist for 1102: NIRANJAN MALIK

[Click for the Detail View and Link](#)

**3. Select loan Approval Worksheet from the Worklist filter**

Work List Filters: Loan Approval Worksheet

From	Date From	Work Item	Worked By Activity	Priority	Link
RADHA LAKHWANI	15/07/2010	Loan Approval Worksheet	IGN_WORKSHEET		<a href="#">1495.-3.MCY</a>
RADHA LAKHWANI	25/11/2010	Loan Approval Worksheet	IGN_WORKSHEET		<a href="#">1133.1005.MCY</a>

**4. Click on the Request link**

5. After opening the required request a popup is populate with message that “Please Click on Create Expense Sheet Button”
6. Click on OK button

**5. After Clicking on the request link button, Pop up populates with the Message that “Please click on Create Expense Sheet Button”**

The page at [imsuat.odlsoft.com:8765](http://imsuat.odlsoft.com:8765) says:

Please click on Create Expense Sheet Button

OK

**6. Click on Ok button**

Create Expense Sheet

Worked By	Name	Action	Date/Time	Comments	
1	1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2	1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3	1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4	1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok

7. Click on Create Expense Sheet Button as shown below

- ist
- ist Details
- ator
- ng Tools
- ools
- User Manual
- onalizations
- m Profile
- onary

**Set Loan Period**

Start Month of salary deduction:

End month of salary deduction:

**Interest Details**

[Calculate Interest Amount](#)

Installments:  Monthly Amount:

Last Interest Installment(if Any):

Rebate Sanctioned

[Create Expense Sheet](#)

**7. Click on Create Expense Sheet Button**

Approval History				
Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4 1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok

**8. Click on Goto Expense Sheet ID link for the creation of Expense Sheet number**

**Menu**

Search:

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Loans & Advances
- Set Up HRMS
- Worklist
  - Worklist
  - Worklist Details
  - Navigator
- Reporting Tools
- PeopleTools
- HRMS User Manual
- My Personalizations

[New Window](#) | [Help](#) | [Customize Page](#)

[Raise Loan Request](#)
[Approve Loan Request](#)

[Goto Expense Sheet ID](#)

**8. Click on Goto Expense Sheet ID link**

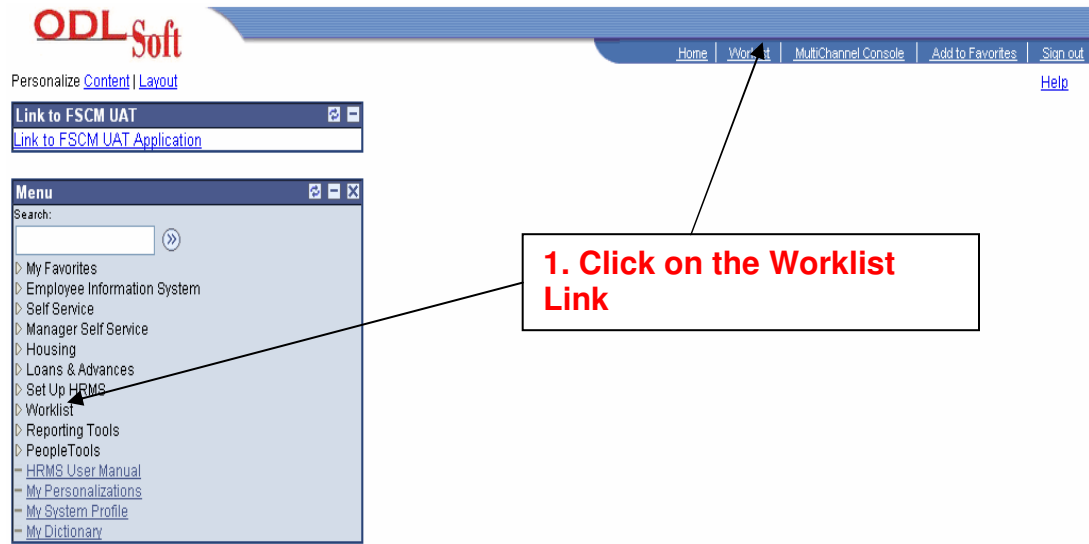
Status

**Worksheet for Loan Approval**

Employee Details			
EmpID:	1133	V.K. MALHOTRA	
Designation:	SSE	GradePay:	8900
Basic Salary:	51440	Date Of Birth:	17/06/1953
Date of retirement:	30/06/2013	Payroll Approved:	Not Approved
Loan ID:	1005	Sanctioned Status:	Sanctioned

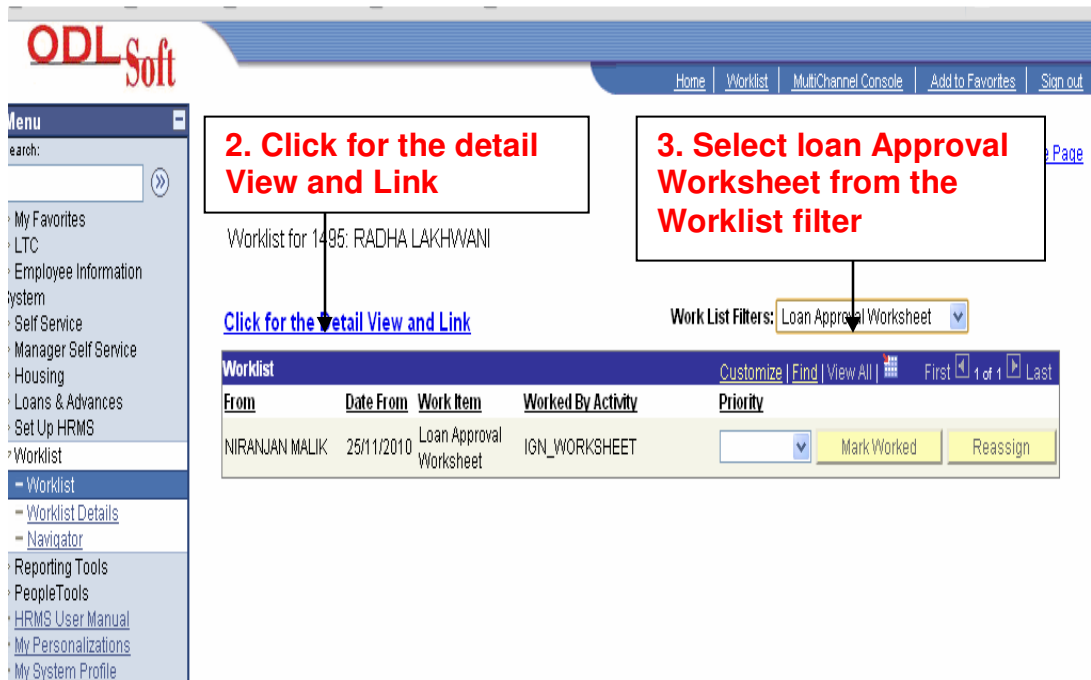
**Note:-After the creation of Expense sheet, request is submitted in the worklist of salary section approver's Id**

1. Click on the worklist link to open the request submitted as shown below



2. Click for the detail view and link as shown below screen shot

3. To open the Loan request choose "Loan approval worksheet" from the worklist filter as shown below



5. Click on Approve Loan Request Tab

- Shows the expense sheet Id number
- Shows the Employee and Required loan details

The screenshot shows the 'Approve Loan Request' tab in the HRMS system. A sidebar on the left contains navigation options like 'My Favorites', 'LTC', 'Employee Information System', 'Self Service', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', 'Worklist', 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Worksheet for Loan Approval' and includes the following sections:

- Expense Sheet Information:** 'Goto Expense Sheet ID' 000008144, 'Status' Pending.
- Employee Details:**

EmpID:	1133	V.K. MALHOTRA
Designation:	SSE	GradePay: 8900
Basic Salary:	51440	Date Of Birth: 17/06/1953
Date of retirement:	30/06/2013	Payroll Approved: Not Approved
Loan ID:	1005	Sanctioned Status: Sanctioned
- Repayment Details:** 'Type of Loan: Motor Cycle Advance'.
- Required Loan Details:**

Loan Amount Required:	50000	Desired Installments:	50
-----------------------	-------	-----------------------	----

Callouts in red text highlight: '5. Click on the Approve Loan Request Tab', 'Shows the Expense sheet ID number', 'Shows the Payroll status as Not Approved and Sanction status as Sanctioned', and 'Shows the Required loan details'.

## Sanctioned Loan Details are as below

**Note: - Calculate Interest Amount button is enabled only in case of Salary Section Approval**

6. Click on the Calculate Interest Amount Button
7. Enter the remarks
8. Click on the Payroll Section Approved Button

The screenshot displays the 'Sanctioned Loan Details' web application interface. On the left is a navigation menu with options like 'My Favorites', 'LTC', 'Employee Information System', 'Self Service', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', 'Worklist', 'Worklist Details', 'Navigator', 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is divided into several sections:

- \*Sanctioned Loan Amount:** A text box containing the value '50000'.
- Principle Details:** Includes a 'Calculate Principle Installment Amount' button, 'Installments' (50), 'Monthly Amount' (583.00), and 'Last Installment(if any):' (10000.00).
- Set Loan Period:** Includes 'Start Month of salary deduction:' (01/12/2010) and 'End month of salary deduction:' (31/03/2019).
- Interest Details:** Includes a 'Calculate Interest Amount' button, 'Installments' (50), 'Monthly Amount' (583.00), and 'Last Interest Installment(if Any):' (599.67).
- Rebate Sanctioned:** A checkbox that is currently unchecked.
- Remarks:** A text area containing the text 'ok'.
- Payroll Section Approved:** A button located below the remarks area.
- Approval History:** A table showing the history of actions taken on the loan.

Callouts provide the following instructions:

- Shows the sanctioned loan details filled by first level of Approval:** Points to the 'Sanctioned Loan Amount' and 'Principle Details' sections.
- 6. Click on Calculate interest Amount button in Interest details, It is enabled in case of salary section:** Points to the 'Calculate Interest Amount' button.
- 7. Enter the Remarks:** Points to the 'Remarks' text area.
- 8. Click on Payroll Section Approved Button:** Points to the 'Payroll Section Approved' button.

Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4 1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok
5 1102	NIRANJAN MALIK	Sent To Salary Section	25/11/10 11:45:20AM	

**Note:-After the Payroll section Approval, request is submitted for Loan Rebate Process Approval at first level approver's Worklist**

### Loan Rebate Approval Process:-

1. Click on the worklist link to open the request submitted as shown below

2. Click for the detail view and link as shown below screen shot

3. To open the Loan request choose "Loan Rebate Approval" from the worklist filter as shown below

4. Find the required request number and click on the link to open the request

**2. Click for the detail View and Link**

Worklist for 1102: NIRANJAN MALIK

[Click for the Detail View and Link](#)

**3. Select loan Rebate Approval from the Worklist filter**

Work List Filters: Loan Rebate Approval

**4. Click on the Request link**

Menu

Search:

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Loans & Advances
- Set Up HRMS
- Worklist
  - Worklist
  - Worklist Details
  - Navigator
- Reporting Tools
- PeopleTools
- HRMS User Manual
- My Personalizations
- My System Profile

Worklist

From	Date From	Work Item	Worked By Activity	Priority	Link
RADHA LAKHWANI	25/11/2010	Loan Rebate Approval	IGN_WORKSHEET		<a href="#">1133_1005_MCY</a>

Customize | Find | View All

Mark

**5. Click on the Approve Loan Request Tab**

**5. Click on the Approve Loan Request Tab**

Raise Loan Request | **Approve Loan Request** | Customize Page

**Worksheet for Loan Approval**

**Employee Details**

EmpID:	1133	V.K. MALHOTRA
Designation:	SSE	GradePay: 8900
Basic Salary:	51440	Date Of Birth: 17/06/1953
Date of retirement:	30/06/2013	Payroll Approved: Approved
Loan ID:	1005	Sanctioned Status: Sanctioned

**Repayment Details**

Type of Loan: Motor Cycle Advance

**Required Loan Details**

Loan Amount Required:	50000	Desired Installments:	50
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Menu

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Loans & Advances
- Set Up HRMS
- Worklist
  - Worklist
  - Worklist Details
  - Navigator
- Reporting Tools
- PeopleTools
- HRMS User Manual
- My Personalizations
- My System Profile
- My Dictionary



6. Select the Rebate Sanctioned Check box
7. Enter the remarks
8. Click on the Approve Rebate Button for the approval of rebate

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Loans & Advances
- Set Up HRMS
- Worklist
- Worklist
- Worklist Details
- Navigator
- Reporting Tools
- PeopleTools
- [HRMS User Manual](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

### Sanctioned Loan Details

#### \*Sanctioned Loan Amount

#### Principle Details

Calculate Principle Installment Amount

Installments: 
Monthly Amount:

Last Installment(if any):

#### Set Loan Period

Start Month of salary deduction:

End month of salary deduction:

#### Interest Details

Calculate Interest Amount

Installments: 
Monthly Amount:

Last Interest Installment(if Any):

Rebate Sanctioned

Employee is Sanctioned Interest Rebate of 2.5% over the standard Interest Rate for this Loan Type.

Remarks:

ok

Approve Rebate

Approval History				
Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4 1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok
5 1102	NIRANJAN MALIK	Sent To Salary Section	25/11/10 11:45:20AM	
6 1495	RADHA LAKHWANI	Payroll Approved	25/11/10 12:49:22PM	

9. After the approval, a pop is populate with the message “Rebate Request for the Loan has been sent to the next level of approver”.
10. Click on Ok button

**9. After Clicking on the Approve Rebate button, Pop up populates with the Message that “Rebate Request for the Loan has been sent to the next level of approver”**

**10. Click on Ok button**

**After first level of approval, request is submitted to the next level approver’s worklist**

**Worksheet for Loan Approval**

**Employee Details**

EmpID:	1133	V.K. MALHOTRA	GradePay:	8900
Designation:	SSE		Date Of Birth:	17/06/1953
Basic Salary:	51440		Payroll Approved:	Approved
Date of retirement:	30/06/2013		Sanctioned Status:	Sanctioned
Loan ID:	1005			

**Repayment Details**

Type of Loan: Motor Cycle Advance

**Required Loan Details**

Loan Amount Required:	50000	Desired Installments:	50
-----------------------	-------	-----------------------	----

\*There are no previous loans availed

11. Enter the Remarks
12. Click on approve rebate button

**Note: - If Rebate request is not according to the terms and conditions, it can be send back to the first level approver's worklist by clicking on "Send Back Rebate Request Button" as shown below**

**ODL Soft**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

**Menu**

Search:

- My Favorites
- Employee Information System
- Self Service
- Manager Self Service
- Housing
- Workforce Administration
- Loans & Advances
- Workforce Development
- Organizational Development
- Set Up HRMS
- Worklist
  - Worklist Details
  - Navigator
- Reporting Tools
- PeopleTools
- HRMS User Manual
- My Personalizations
- My System Profile
- My Dictionary

**Sanctioned Loan Details**

**\*Sanctioned Loan Amount**  
50000

**Principle Details**  
Calculate Principle Installment Amount  
Installments: 50 Monthly Amount: 1000.00  
Last Installment(if any): 1000.00

**Set Loan Period**  
Start Month of salary deduction: 01/11/2010  
End month of salary deduction: 31/03/2010

**Interest Details**  
Calculate Interest Amount  
Installments: 50 Monthly Amount: 479.17  
Last Interest Installment(if Any): 479.00

Rebate Sanctioned   
Employee is Sanctioned Interest Rebate of 2.5% over the standard interest rate.

Remarks:  
ok

11. Enter the Remarks

12. Click on Approve Rebate button for approval

Approve Rebate Send Back Rebate Request

**Approval History** Customize | Find | First 17 of 7 Last

Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4 1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok
5 1102	NIRANJAN MALIK	Sent To Salary Section	25/11/10 11:45:20AM	
6 1495	RADHA LAKHWANI	Payroll Approved	25/11/10 12:49:22PM	
7 1102	NIRANJAN MALIK	Rebate Request Forwarded	25/11/10 2:57:20PM	ok

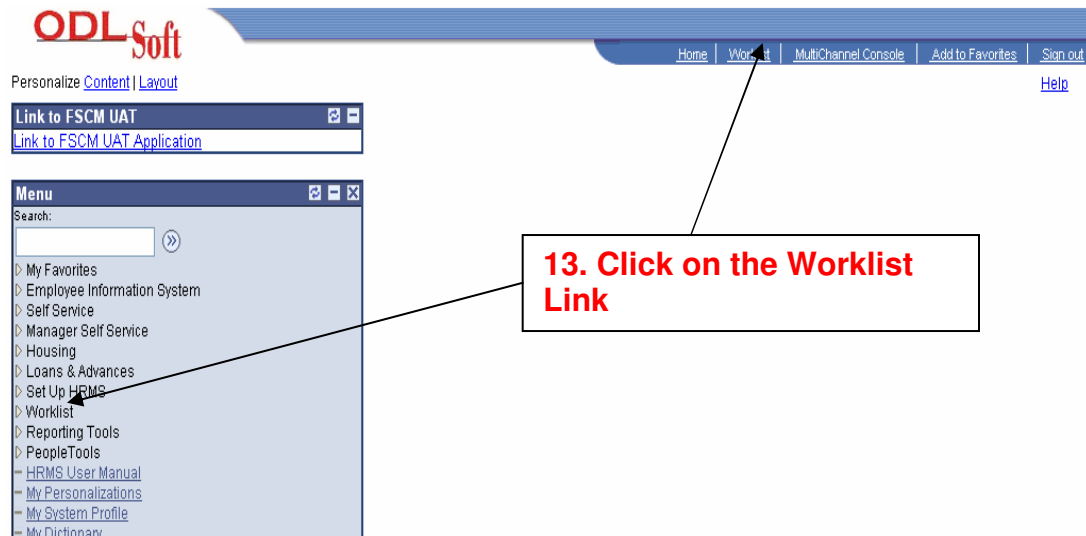
View Worklist Notify

[Raise Loan Request](#) | [Approve Loan Request](#)

If any problem, Request can be send back to first approver by clicking on Send Back Rebate Request Button

**Note:-After approved by second level of approver, rebate approval request is submitted in the worklist of next approver**

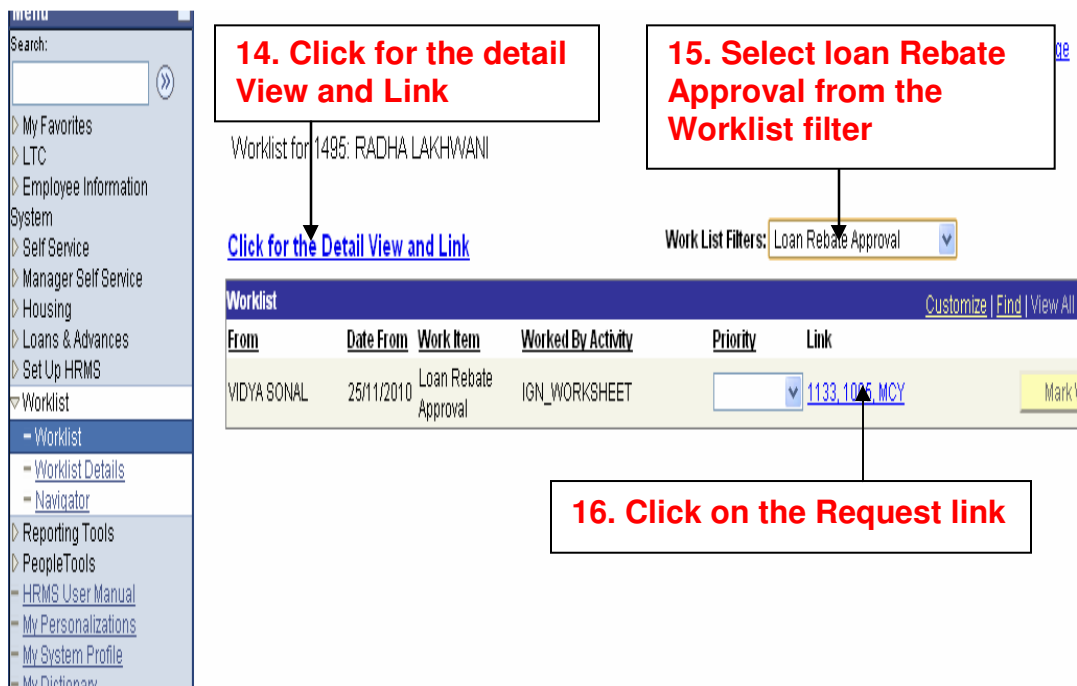
**13. Click on the worklist link to open the request submitted as shown below**



**14. Click for the detail view and link as shown below screen shot**

**15. To open the Loan request choose "Loan Rebate Approval" from the worklist filter as shown below**

**16. Find the required request number and click on the link to open the request**



[Raise Loan Request](#) [Approve Loan Request](#)

### Worksheet for Loan Approval

Employee Details			
EmpID:	1133	V.K. MALHOTRA	
Designation:	SSE	GradePay:	8900
Basic Salary:	51440	Date Of Birth:	17/06/1953
Date of retirement:	30/06/2013	Payroll Approved:	Approved
Loan ID:	1005	Sanctioned Status:	Sanctioned

Repayment Details	
Type of Loan:	Motor Cycle Advance

Required Loan Details	
Loan Amount Required:	50000
Desired Installments:	50

There are no previous loans availed

17. Enter the Remarks
18. Click on approve rebate button

[Sanctioned Loan Details](#)

*Sanctioned Loan Amount	
50000	

Principle Details	
<a href="#">Calculate Principle Installment Amount</a>	
Installments:	50
Monthly Amount:	1000.00
Last Installment(if any): 1000.00	

Set Loan Period	
Start Month of salary deduction:	01/12/2010
End month of salary deduction:	31/03/2019

Interest Details	
<a href="#">Calculate Interest Amount</a>	
Installments:	50
Monthly Amount:	479.17
Last Interest Installment(if Any): 479.00	

Rebate Sanctioned   
 Employee is Sanctioned Interest Rebate of 2.5% over the standard Interest Rate for this Loan Type.

Remarks:

ok

[Freeze Interest Deduction](#) [Approve Rebate](#) [Send Back Rebate Request](#)

17. Enter the Remarks

18. Click on Approve Rebate button

**After the Approval by the last approver, loan rebate is finally approved**

## Rebate Finalization:-

**Note:-For the Finalization of Loan rebate, request is submitted in the first approver worklist**

The screenshot displays a web-based HRMS application. On the left is a navigation menu with options like 'My Favorites', 'Employee Information System', 'Self Service', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', and 'Worklist'. The 'Worklist' section is expanded, showing 'Worklist' as the active item, with sub-options for 'Worklist Details' and 'Navigator'. Other menu items include 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area has a search bar at the top left and navigation links 'New Window', 'Help', and 'Customize Page' at the top right. Below the search bar are two tabs: 'Raise Loan Request' (highlighted) and 'Approve Loan Request'. The main heading is 'Worksheet for Loan Approval'. It contains two sections: 'Employee Details' and 'Repayment Details'. The 'Employee Details' section lists: EmpID: 1133 V.K. MALHOTRA, Designation: SSE, GradePay: 8900, Basic Salary: 51440, Date of Birth: 17/06/1953, Date of retirement: 30/06/2013, Payroll Approved: Approved, Loan ID: 1005, and Sanctioned Status: Sanctioned. The 'Repayment Details' section shows 'Type of Loan: Motor Cycle Advance'. Below this is a 'Required Loan Details' section with 'Loan Amount Required: 50000' and 'Desired Installments: 50'. At the bottom, a message states 'There are no previous loans availed'.

Search:

[New Window](#) | [Help](#) | [Customize Page](#)

[Raise Loan Request](#) [Approve Loan Request](#)

### Worksheet for Loan Approval

Employee Details			
EmpID:	1133	V.K. MALHOTRA	
Designation:	SSE	GradePay:	8900
Basic Salary:	51440	Date Of Birth:	17/06/1953
Date of retirement:	30/06/2013	Payroll Approved:	Approved
Loan ID:	1005	Sanctioned Status:	Sanctioned

Repayment Details	
Type of Loan:	Motor Cycle Advance

Required Loan Details	
Loan Amount Required:	50000
Desired Installments:	50

There are no previous loans availed

**19. Click on Finalize rebate button as shown below**

The screenshot displays a web application interface for loan management. On the left is a navigation menu with options like 'My Favorites', 'Employee Information System', 'Self Service', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', and 'Worklist'. The main content area is titled 'Sanctioned Loan Details' and contains several sections:
 

- \*Sanctioned Loan Amount:** A text box containing the value '50000'.
- Principle Details:** Includes a 'Calculate Principle Installment Amount' button, 'Installments: 50', 'Monthly Amount: 1000.00', and 'Last Installment(if any): 1000.00'.
- Set Loan Period:** Shows 'Start Month of salary deduction: 01/12/2010' and 'End month of salary deduction: 31/03/2019'.
- Interest Details:** Includes a 'Calculate Interest Amount' button and partially visible 'Installments: 50' and 'Monthly Amount: 1000.00'.

 A red callout box with the text '19. Click on the Finalize Rebate Button' points to a yellow 'Finalise Rebate' button located below the 'Interest Details' section. Below this button, there is a checked checkbox for 'Rebate Sanctioned' and a text line: 'Employee is Sanctioned Interest Rebate of 2.5% over the standard Interest Rate for this Loan Type.' At the bottom of the interface, there is an 'Approval History' table and two buttons: 'View Worklist' and 'Notify'.

Worked By	Name	Action	Date/Time	Comments
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4 1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok
5 1102	NIRANJAN MALIK	Sent To Salary Section	25/11/10 11:45:20AM	
6 1495	RADHA LAKHWANI	Payroll Approved	25/11/10 12:49:22PM	
7 1102	NIRANJAN MALIK	Rebate Request Forwarded	25/11/10 2:57:20PM	ok
8 1720	VIDYA SONAL	Rebate Request Forwarded	25/11/10 3:44:34PM	ok
9 1495	RADHA LAKHWANI	Rebate Approved	25/11/10 4:16:24PM	ok

## Freeze Interest Deduction

**Note: - After the Finalization of Loan rebate by first approver, request is submitted in Payroll Section approver's worklist**

Search:  [New Window](#) | [Help](#) | [Customize Page](#)

[Raise Loan Request](#) | **Approve Loan Request**

### Worksheet for Loan Approval

Employee Details			
EmpID:	1133	V.K. MALHOTRA	
Designation:	SSE	GradePay:	8900
Basic Salary:	51440	Date Of Birth:	17/06/1953
Date of retirement:	30/06/2013	Payroll Approved:	Approved
Loan ID:	1005	Sanctioned Status:	Sanctioned

Repayment Details	
Type of Loan:	Motor Cycle Advance

Required Loan Details	
Loan Amount Required:	50000
Desired Installments:	50

There are no previous loans availed



## 1. Enter the Remarks

**Note: - In interest details option Monthly Amount and Last interest installment text box values are editable in case of Freeze Interest Deduction**

## 2. Click on Freeze Interest Deduction button as shown below

The screenshot displays the ODL Soft HRMS interface. On the left is a menu with options like 'My Favorites', 'LTC', 'Employee Information System', 'Self Service', 'Manager Self Service', 'Housing', 'Loans & Advances', 'Set Up HRMS', 'Worklist', 'Worklist Details', 'Navigator', 'Reporting Tools', 'PeopleTools', 'HRMS User Manual', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Sanctioned Loan Details' and includes sections for 'Sanctioned Loan Amount' (50000), 'Principle Details' (with 'Calculate Principle Installment Amount' button), 'Set Loan Period' (Start Month: 01/12/2010, End month: 31/03/2019), and 'Interest Details' (with 'Calculate Interest Amount' button, Installments: 50, Monthly Amount: 479.00, and Last Interest Installment: 487.33). Below these sections is a 'Rebate Sanctioned' checkbox (checked) and a note: 'Employee is Sanctioned Interest Rebate of 2.5% over the standard Interest Rate for the'. A 'Remarks:' field contains the text 'ok'. A 'Freeze Interest Deduction' button is located below the remarks field. An 'Approval History' table is at the bottom, showing a list of actions performed by various users.

**Can Change the Monthly amount in Interest details**

**1. Enter the Remarks**

**2. Click on the Freeze Interest Deduction button**

Worked By	Name	Action	Date/Time	
1 1133	V.K. MALHOTRA	Submitted	24/11/10 12:09:14PM	ok
2 1102	NIRANJAN MALIK	Forwarded	24/11/10 3:04:12PM	ok
3 1720	VIDYA SONAL	Forwarded	24/11/10 4:12:15PM	ok
4 1495	RADHA LAKHWANI	Approved	25/11/10 10:39:10AM	ok
5 1102	NIRANJAN MALIK	Sent To Salary Section	25/11/10 11:45:20AM	
6 1495	RADHA LAKHWANI	Payroll Approved	25/11/10 12:49:22PM	
7 1102	NIRANJAN MALIK	Rebate Request Forwarded	25/11/10 2:57:20PM	ok
8 1720	VIDYA SONAL	Rebate Request Forwarded	25/11/10 3:44:34PM	ok
9 1495	RADHA LAKHWANI	Rebate Approved	25/11/10 4:16:24PM	ok
10 1102	NIRANJAN MALIK	Rebate Finalized	25/11/10 4:32:40PM	

Search:

- ▶ My Favorites
- ▶ LTC
- ▶ Employee Information System
- ▶ Self Service
- ▶ Manager Self Service
- ▶ Housing
- ▶ Loans & Advances
- ▶ Set Up HRMS
- ▼ Worklist
  - ▶ Worklist
  - ▶ Worklist Details
  - ▶ Navigator
- ▶ Reporting Tools
- ▶ PeopleTools
  - ▶ HRMS User Manual
  - ▶ My Personalizations
  - ▶ My System Profile
  - ▶ My Dictionary

[Raise Loan Request](#) | **Approve Loan Request**

### Worksheet for Loan Approval

**After Freezing the Interest Deduction, sanction Status changes as Sanction&Deduction Finalized**

#### Employee Details

<b>EmplID:</b>	1133	V.K. MALHOTRA	<b>GradePay:</b>	8900
<b>Designation:</b>	SSE		<b>Date Of Birth:</b>	17/06/1953
<b>Basic Salary:</b>	51440		<b>Payroll Approved:</b>	Approved
<b>Date of retirement:</b>	30/06/2013		<b>Sanctioned Status:</b>	Sanctioned&Deduction Finalized
<b>Loan ID:</b>	1005			

#### Repayment Details

**Type of Loan:** Motor Cycle Advance

#### Required Loan Details

**Loan Amount Required:** 50000 **Desired Installments:** 50

\*There are no previous loans availed