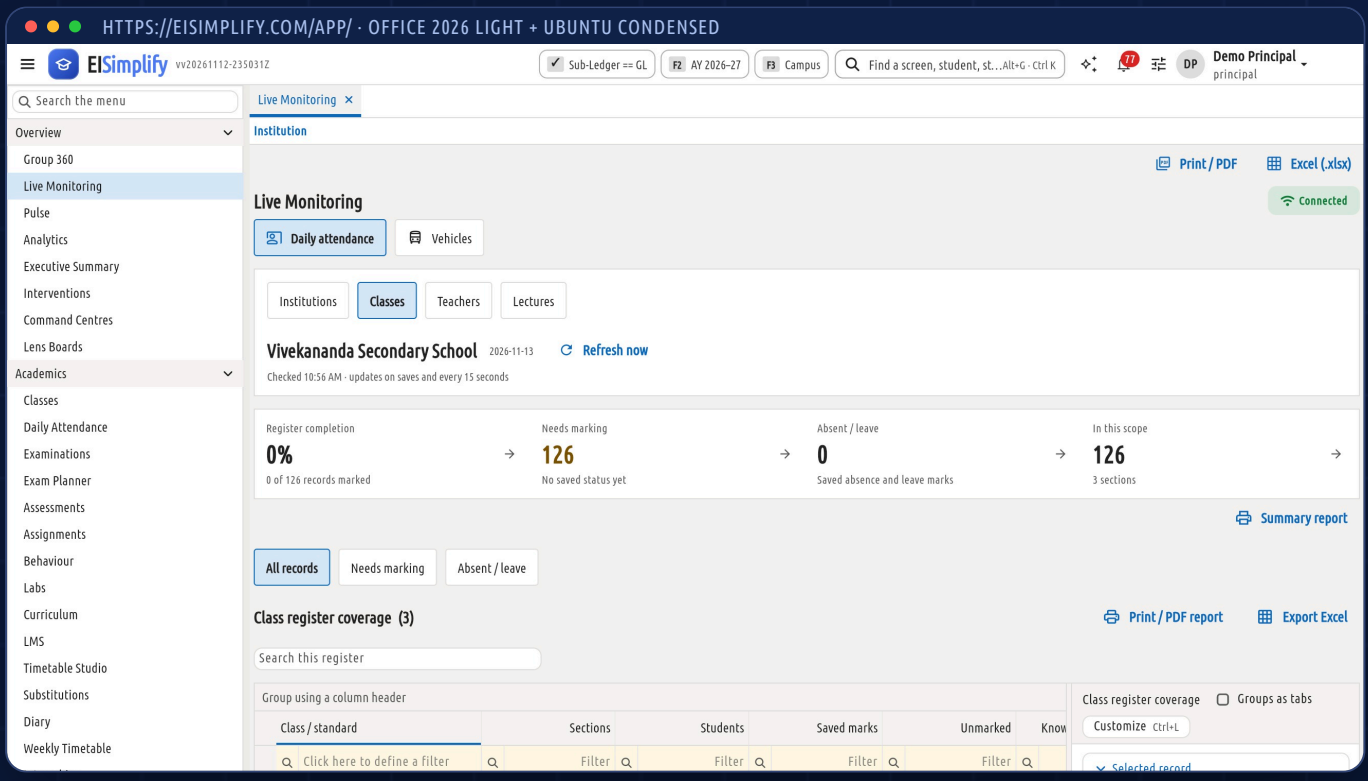
EISimplify

VERSION 3.0 · OFFICIAL USER MANUAL

Complete Operator & Administrator User Manual

Twenty illustrated step-by-step chapters covering every workflow across all 6 Consolidated Workspaces, 12 Role-Based Portals, Universal Zero-Variance Drill-Down, Direct A4 PDF Print Preview, Native Android v3.0, and DPDP Act 2023 + Rules 2025 Operations.

20 Structured Chapters | 12 Role Portals | Keyboard Shortcut Mastery | DPDP Act 2023 DPO Playbook



MANUAL DIRECTORY · CHAPTERS 01 – 20

Master Index & Essential Keyboard Shortcuts

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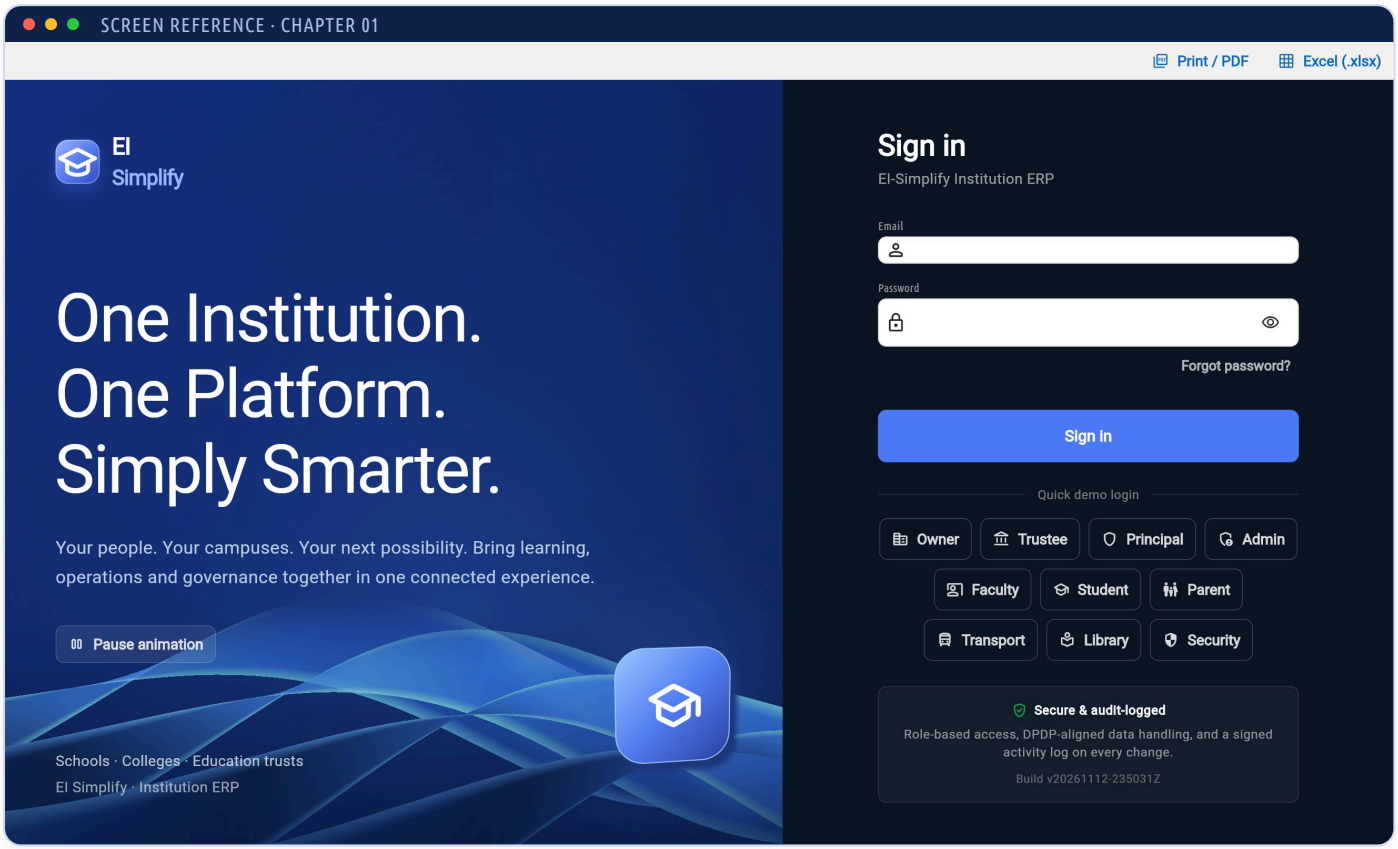
Ctrl + K	F2 / F3	Alt + P	Alt + E	Esc
Global Command Search	Period / Campus Scope	Direct A4 PDF Preview	Scoped Excel (.xlsx)	Step Back / Close Drill

CHAPTER 01 · GETTING STARTED

Welcome, System Requirements & 12 Role-Based Logins

Sign in cleanly on Web or Native Android v3.0 across any of the twelve least-privilege institutional portals.



STEP-BY-STEP OPERATING PROCEDURE

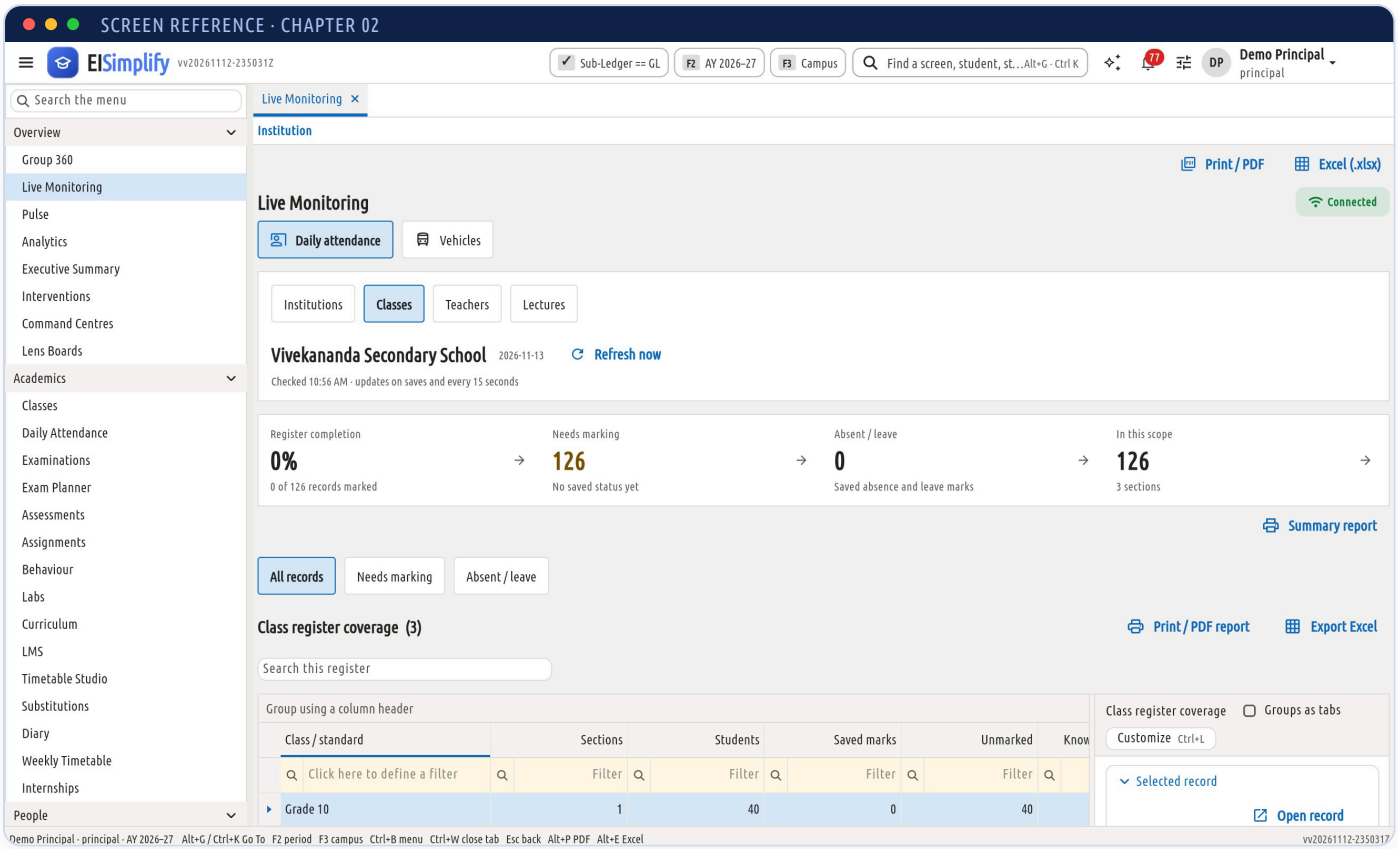
1. Open https://eisimplify.com/app/ in Chrome, Edge, Firefox, or Safari, or launch the EI-Simplify v3 Android app.
2. Enter your institutional email or login ID and password (or select any seeded role on the demo sandbox).
3. If your administrator enabled Two-Factor Authentication (TOTP MFA), enter the 6-digit authenticator code.
4. EI-Simplify loads your role's tailored workspace: Principal, Trust Owner, Trustee, Admin, HOD, Accountant, Faculty, Student, Parent, Transport, Librarian, or Gate Security.

Operator Best Practice: Sessions enforce strict tenant and campus isolation on both the UI and every Go API request.

CHAPTER 02 · GETTING STARTED

Navigating the Six Consolidated Workspaces & Top Command Bar

Every module sits predictably inside six left-rail workspaces in our high-clarity Office Light skin with Ubuntu Condensed typography.



STEP-BY-STEP OPERATING PROCEDURE

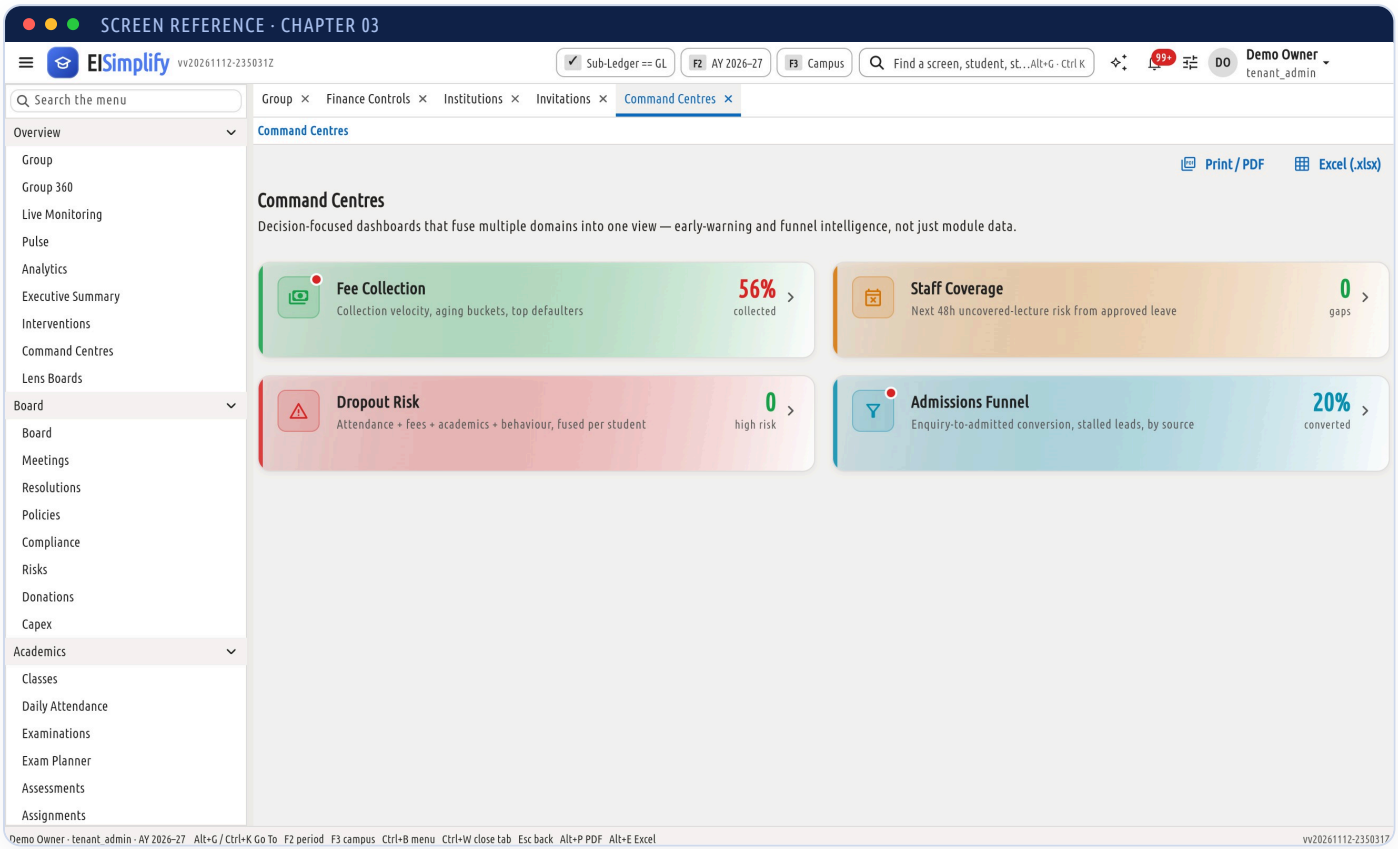
1. Use the Left Workspace Rail to open: (1) Command Centre, (2) Academics, (3) People & 360, (4) Finance & Payroll, (5) Campus Operations, or (6) Governance & DPDP.
2. Open multiple screens simultaneously as top workspace tabs to compare attendance, fees, or timetables side-by-side.
3. Click the Shield icon next to the notification bell in the top bar anytime to open your DPDP Privacy Desk or Institution Compliance Suite.
4. Press Ctrl+K from anywhere in the application to jump straight to any screen, student, teacher, invoice, or voucher.

Operator Best Practice: Collapse the left rail with the sidebar toggle whenever you want extra horizontal width for financial or timetable grids.

CHAPTER 03 · GETTING STARTED

Keyboard-First Speed Reference & Grid Controls

Operate daily front-office, registrar, and accounting desks rapidly without lifting your hands from the keyboard.



STEP-BY-STEP OPERATING PROCEDURE

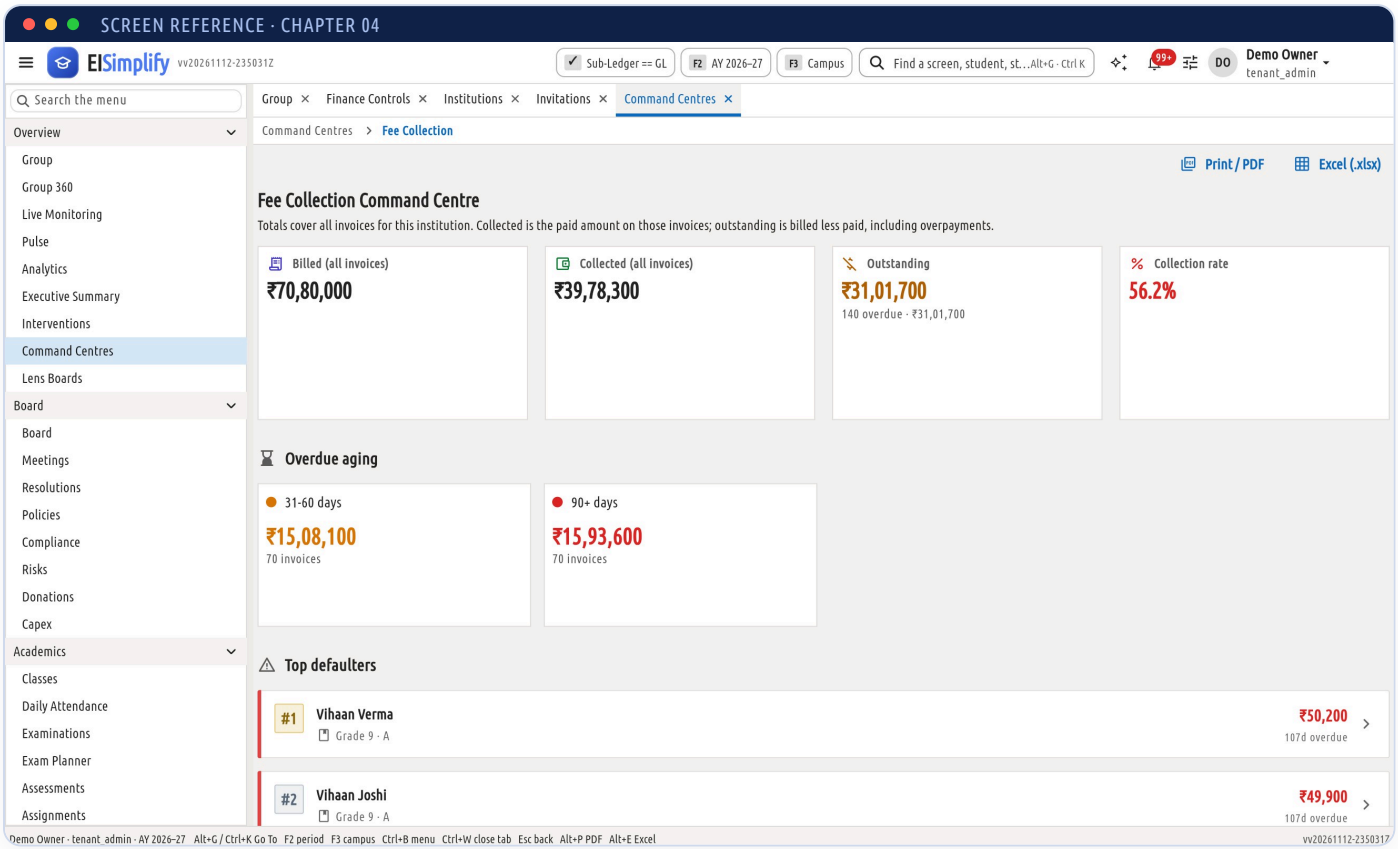
1. Ctrl+K — Global Command Search across screens, learners, staff, and voucher numbers.
2. F2 — Switch active Academic Period / Year (keeps your open screen refreshed to that period).
3. F3 — Switch Campus Scope between a single school/college or Trust-wide consolidation.
4. Alt+P — Open Instant Direct A4 PDF Print Preview for the active screen; Alt+E — Export Excel (.xlsx) Workbook.
5. Esc — Step one level back out of any Progressive Drill-Down, modal dialog, or search overlay.

Operator Best Practice: Inside tabular registers, use Up/Down arrows and PageUp/PageDown for fast row scanning and Enter to open the underlying detail record.

CHAPTER 04 · CORE V3 SUPERPOWERS

Universal Progressive Drill-Down & Zero-Variance Reconciliation Seal

Click any number, summary card, chart bar, or table total anywhere in EI-Simplify to inspect the breakdown down to the source voucher.



STEP-BY-STEP OPERATING PROCEDURE

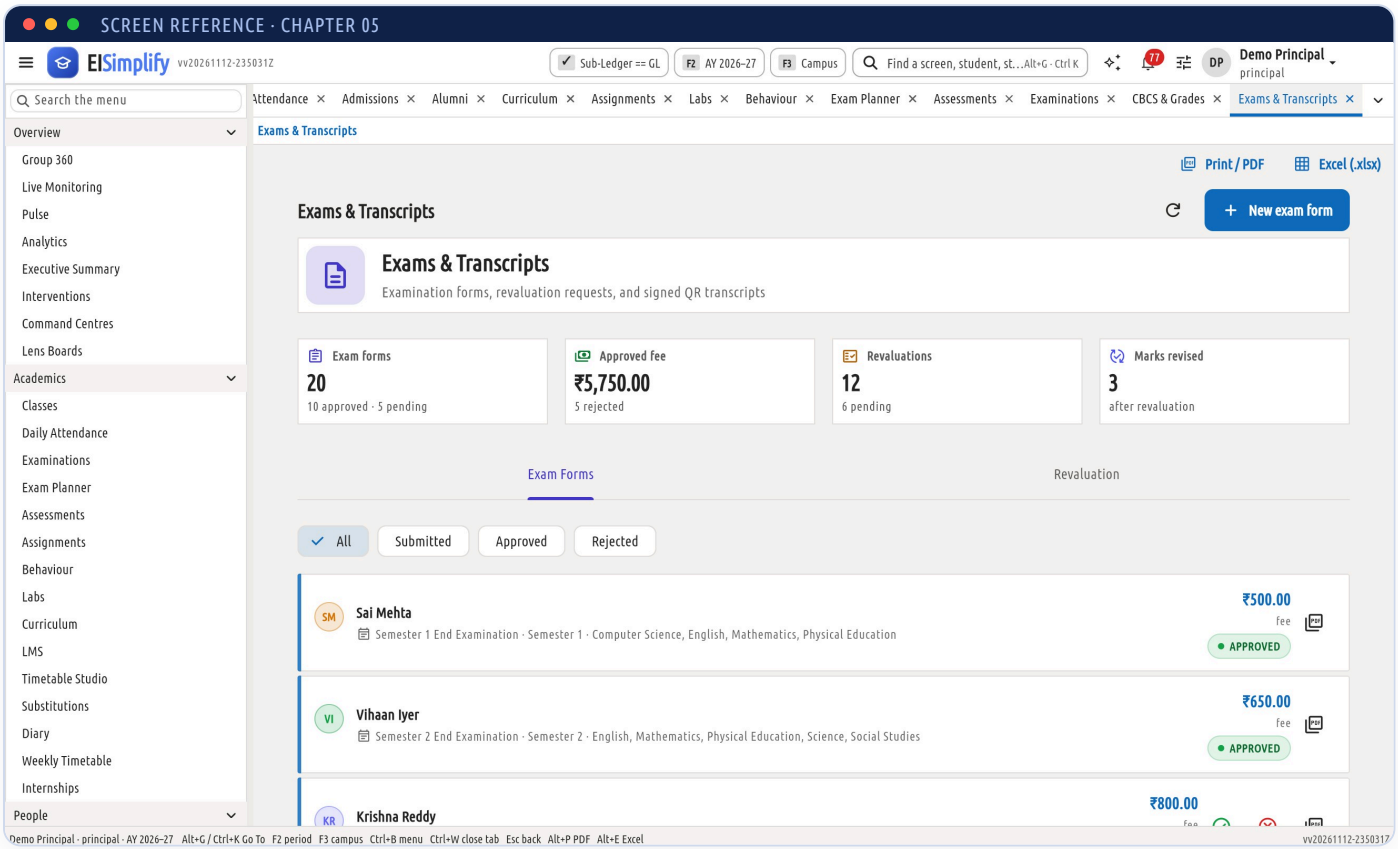
1. Click any KPI metric card, table total, or chart bar on any dashboard or financial report.
2. Examine the next breakdown tier (for example: Total Revenue -> By Category -> By Class/Customer -> By Month -> Individual Vouchers).
3. Verify the live green Reconciliation Seal banner confirming that Parent Total == Sum of Child Rows (Variance: 0).
4. Continue clicking through until the lowest-level original student receipt, fee invoice, or journal voucher opens, while active date and branch filters remain locked.
5. Use the top breadcrumb bar to jump back to any earlier level or press Esc to return one step.

Operator Best Practice: You can print the current drill-down breakdown table cleanly at any depth directly into A4 PDF Preview.

CHAPTER 05 · CORE V3 SUPERPOWERS

Direct PDF Print Preview (Alt+P) & Scoped Excel Exports (Alt+E)

All 132 authenticated screens and 7 public flows produce print-ready A4 PDFs directly inside the workspace.



STEP-BY-STEP OPERATING PROCEDURE

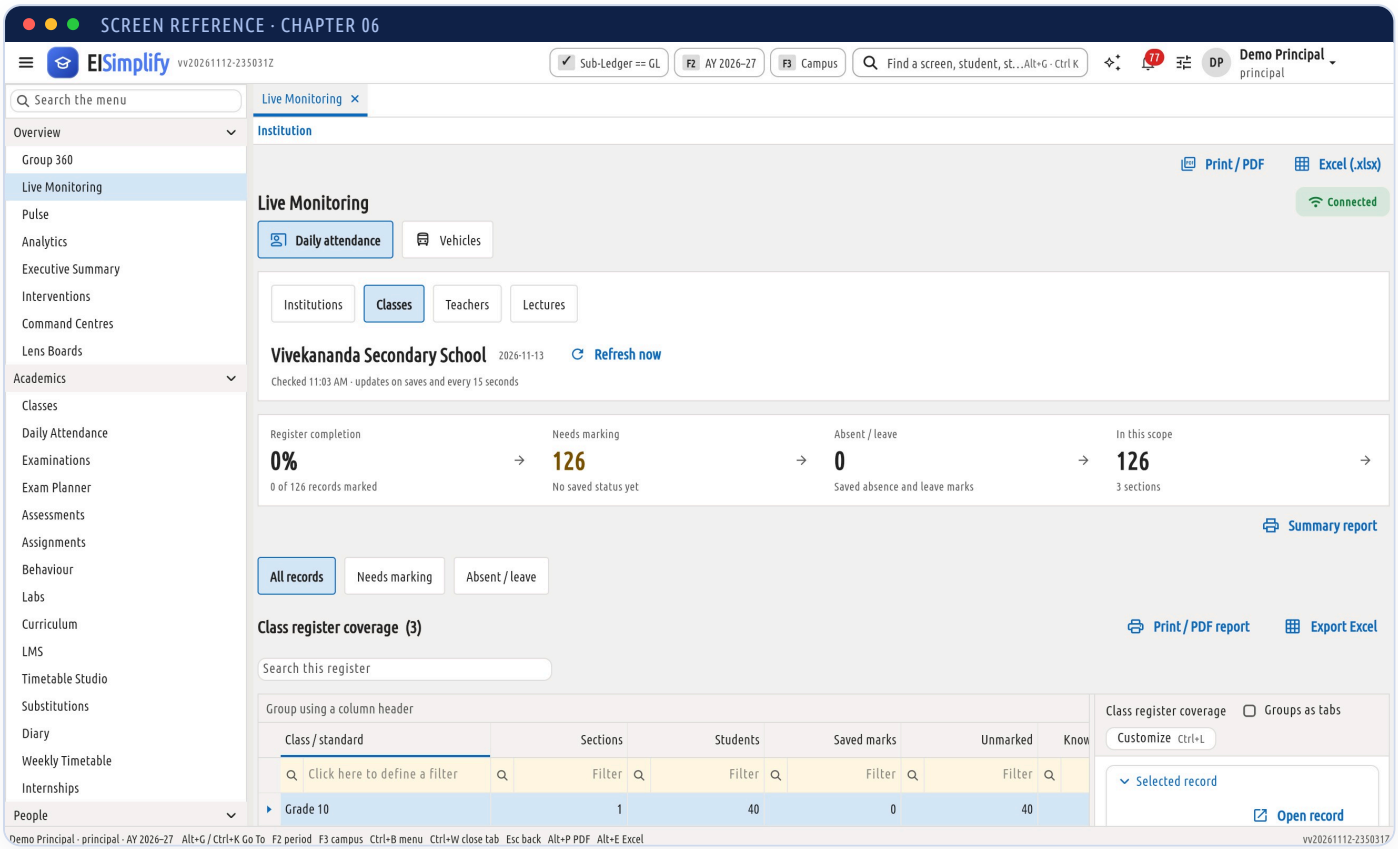
1. Filter or group any table, ledger, marks sheet, or operational dashboard to the exact slice you want.
2. Click Print / PDF in the top action bar or press Alt+P to launch the built-in A4 PDF Print Previewer.
3. Use the viewer toolbar to zoom, jump pages, search student names or voucher IDs, download the PDF, or print cleanly.
4. Need raw structured spreadsheets? Click Excel (.xlsx) or press Alt+E to download formatted multi-sheet workbooks.

Operator Best Practice: For privacy, cached PDF previews and Excel exports automatically invalidate immediately whenever you switch campus scope or sign out.

CHAPTER 06 · WORKSPACE 01 · COMMAND CENTRE

Campus Pulse, Live 15s Board, Executive Briefing & 4 Decision Hubs

Spot attendance dips, uncovered lectures, fee aging, and admissions bottlenecks live every morning.



STEP-BY-STEP OPERATING PROCEDURE

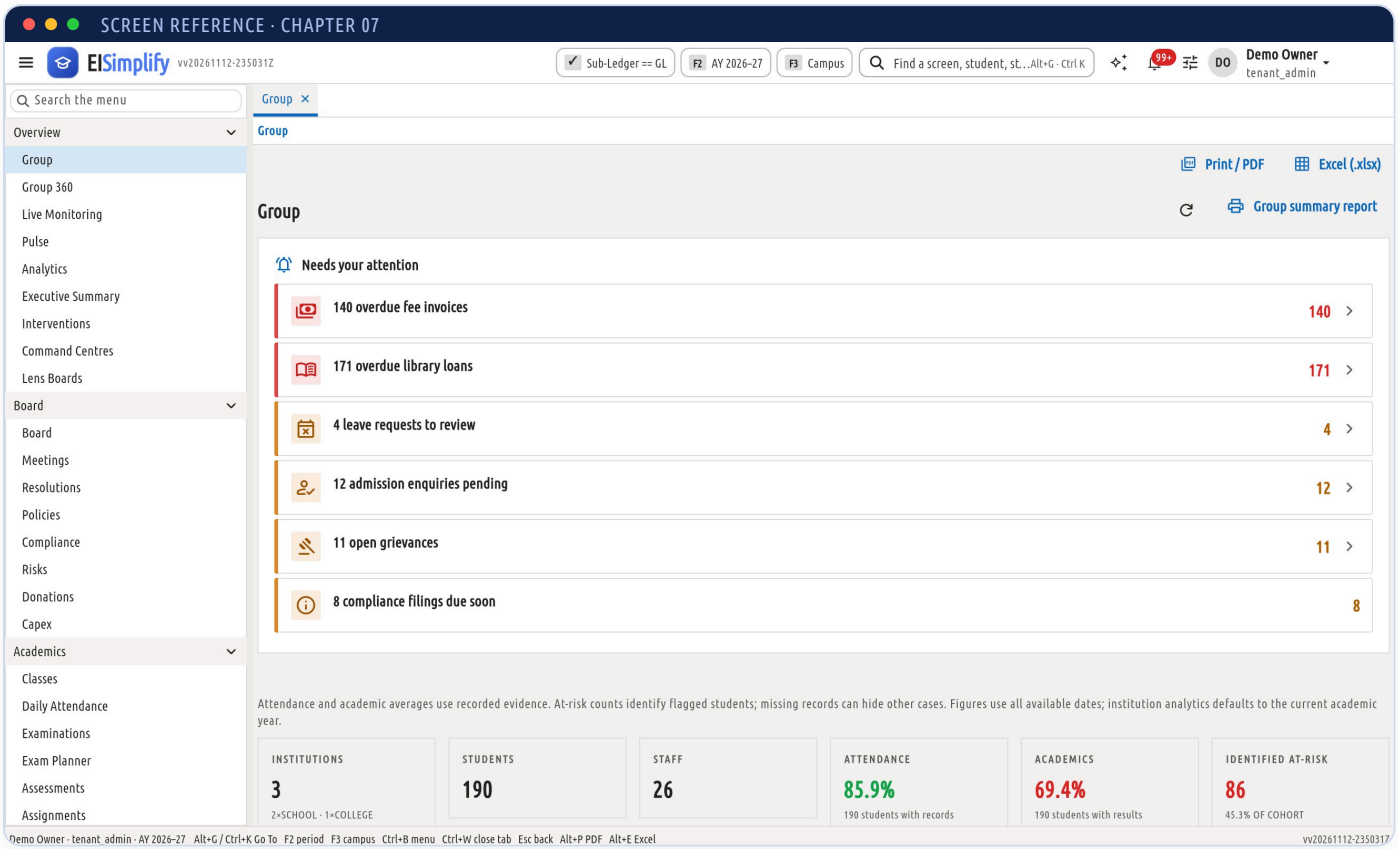
1. Open Command Centre -> Campus Pulse for the morning snapshot of attendance, collections, active periods, and urgent exceptions.
2. Switch to Live Monitoring to follow period attendance completion and transport fleet GPS routes updating in 15-second ticks.
3. Inspect the four Decision Command Centres: Fee Collection Velocity, Student Retention & Dropout Radar, 48-Hour Staff Substitution, and Admissions Conversion.
4. Open Executive Summary for narrative AI-synthesised highlights prepared from your institution's live operational ledger.

Operator Best Practice: Click any warning badge inside Retention Radar to open the learner's Student 360° profile with attendance and arrears context.

CHAPTER 07 · WORKSPACE 01 · GROUP COMMAND

Multi-Campus Group Hub, Institutional Onboarding & Role Invitations

Scale effortlessly from one school to an education trust managing K-12, PU, and degree campuses.



STEP-BY-STEP OPERATING PROCEDURE

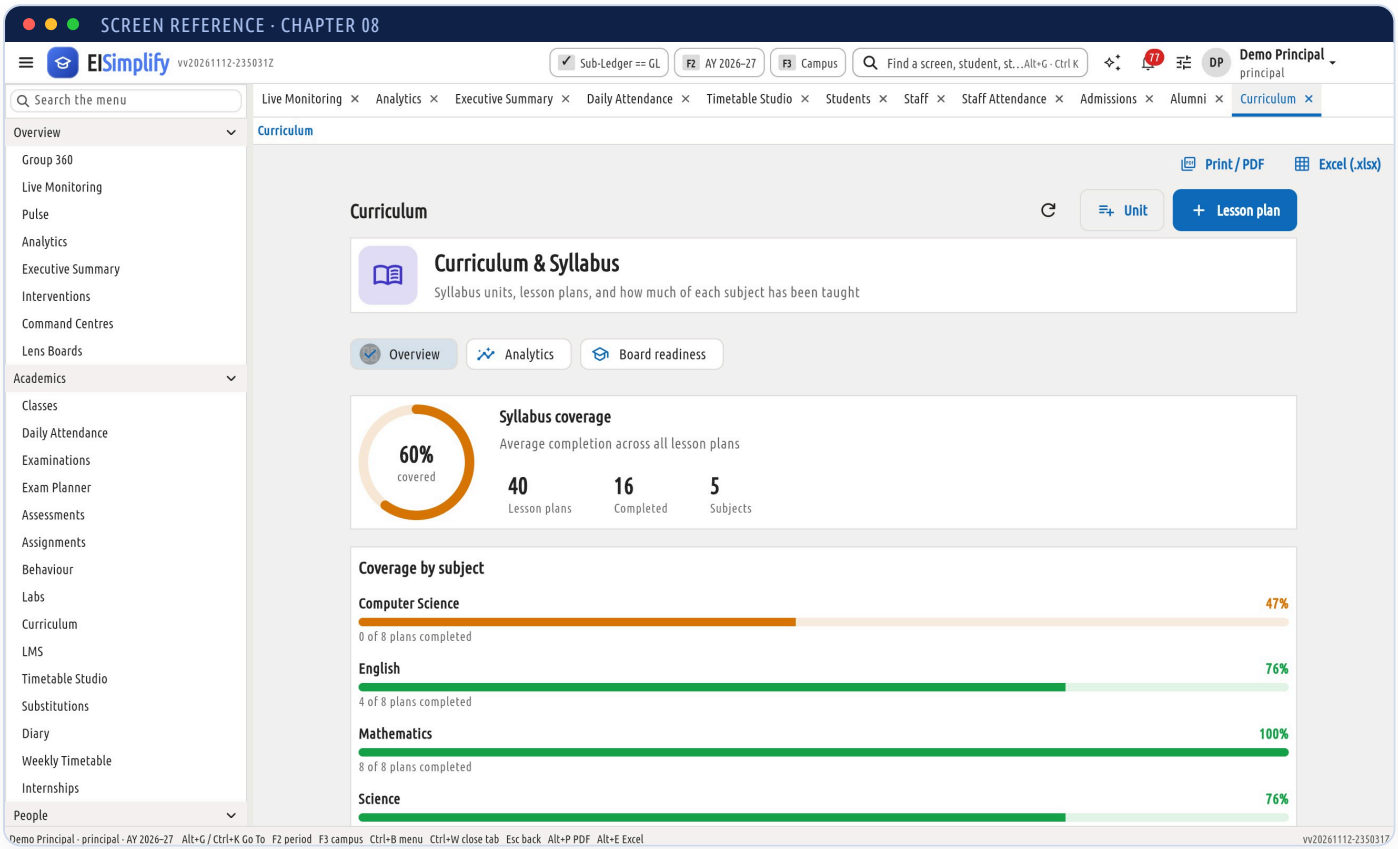
1. Education trust owners open Group Command Overview to benchmark enrolments, attendance percentages, fee recovery, and staff ratios across all branches.
2. Add new campuses via Group -> Institutions with independent boards, academic sessions, tax profiles, and letterheads.
3. Issue secure expiring invitations under Group -> Invitations to onboard principals, accountants, and trustees with exact campus scopes.
4. Use Group Finance to monitor monthly period locks and verify inter-campus consolidation health.

Operator Best Practice: Single-campus schools see a clean branch header; multi-campus trusts unlock cross-branch aggregation automatically via F3.

CHAPTER 08 · WORKSPACE 02 · ACADEMICS

Board-Aware Curriculum (CBSE/ICSE/State), Timetables & Live Lectures

Configure official syllabi across all Indian boards and build conflict-free schedules in minutes.



STEP-BY-STEP OPERATING PROCEDURE

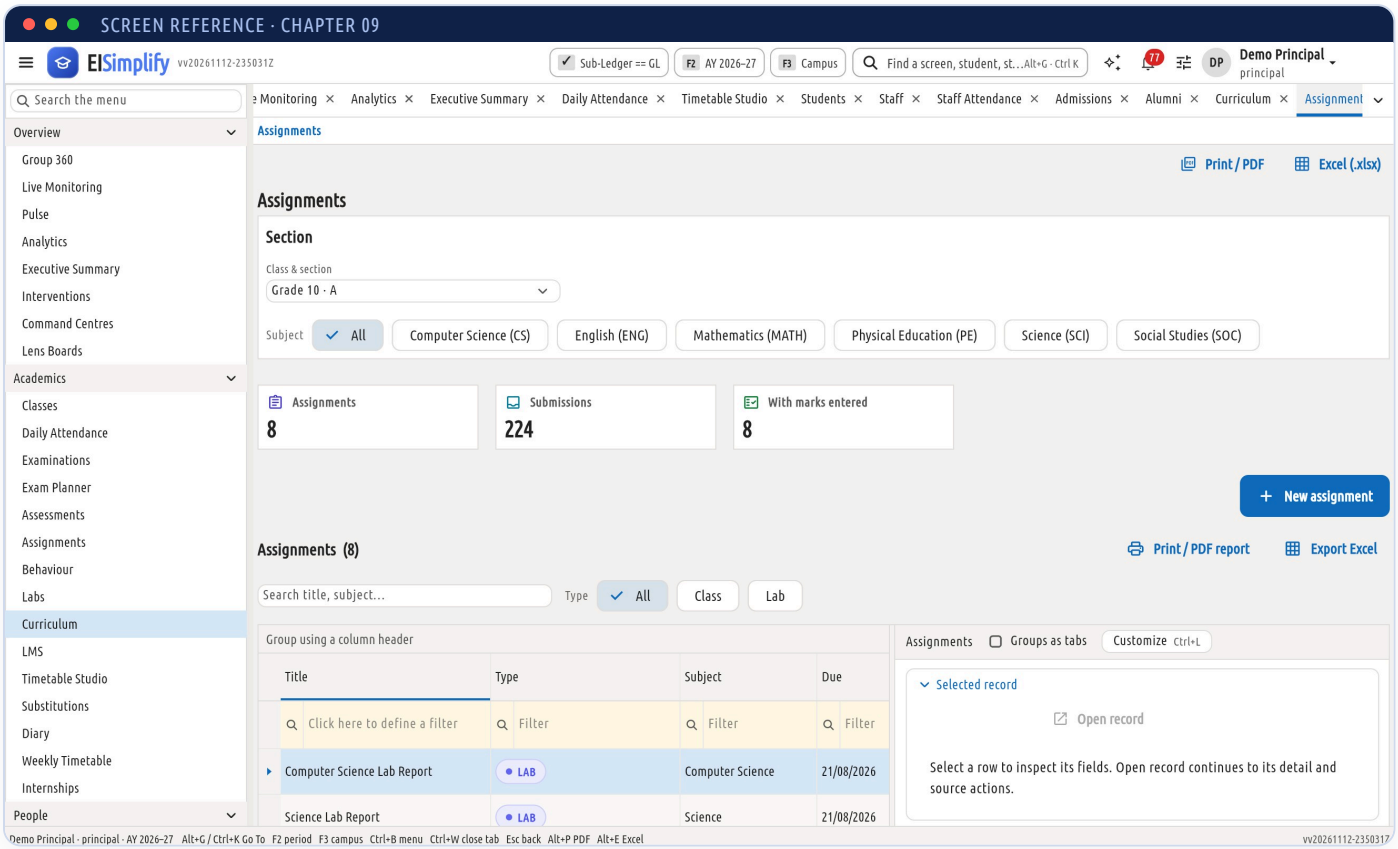
1. Open Academics -> Curriculum to select your institution's affiliated board catalogue (CBSE, ICSE/ISC, or any of the 28 state / 8 UT boards).
2. Map chapters, unit plans, teaching hours, and learning outcomes per subject and grade.
3. Launch Timetable Studio to assign periods and rooms; built-in conflict guards prevent teacher double-booking or room over-allocation.
4. Faculty start Live Lectures directly from their scheduled period slots to track syllabus completion cleanly.

Operator Best Practice: Substitute assignments from the 48-Hour Leave Forecast reflect immediately on the day's Timetable Studio grid.

CHAPTER 09 · WORKSPACE 02 · LEARNING & LABS

LMS Modules, Assignments, Online Assessments, Labs & Behaviour

Coordinate daily classroom instruction, lab rubrics, digital assignments, and learner pastoral logs.



STEP-BY-STEP OPERATING PROCEDURE

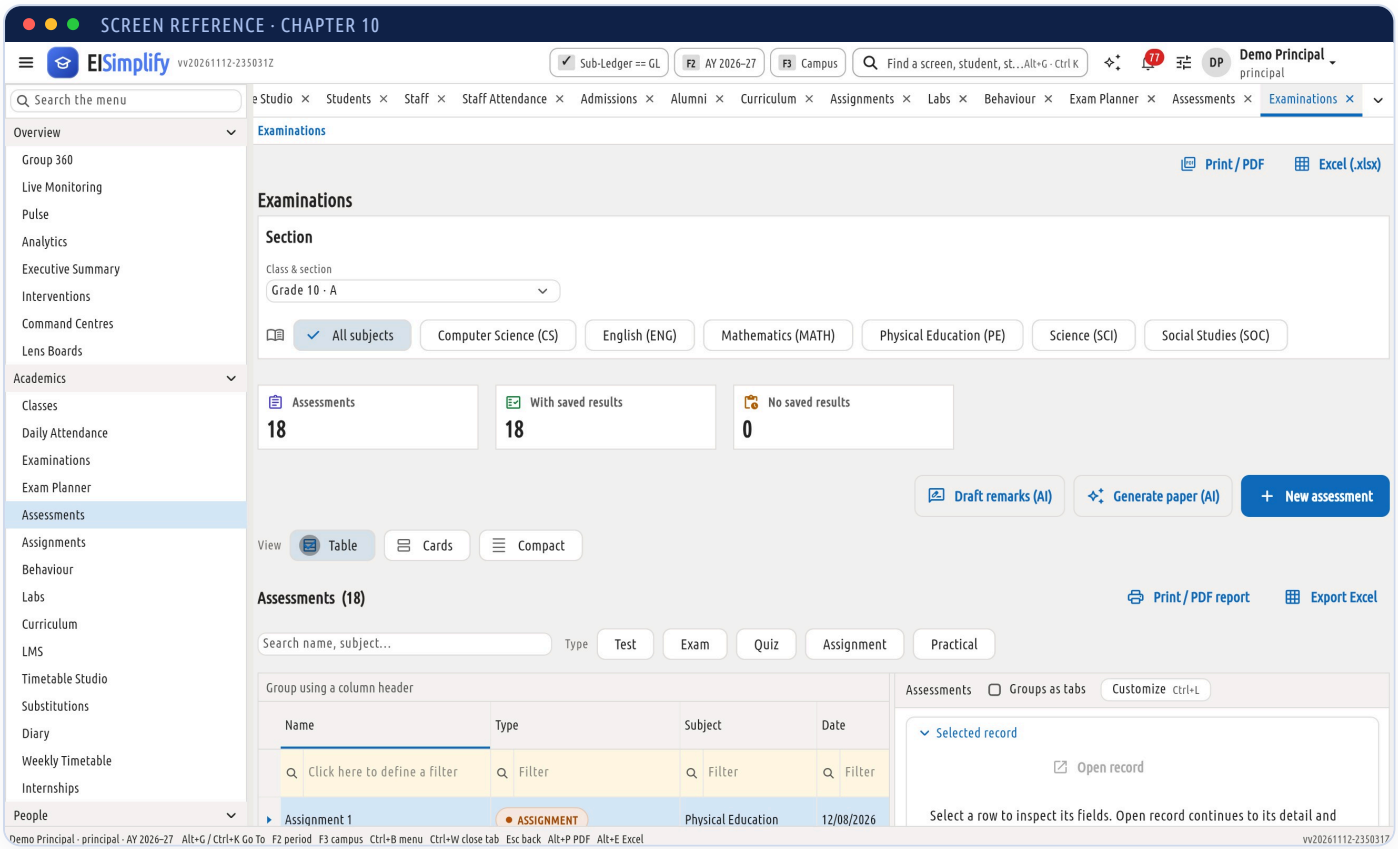
1. Publish digital assignments, reading packs, and submission deadlines per section under Academics -> Assignments.
2. Run timed quizzes and formative Assessments inside the LMS workspace with instant auto-scoring for objective items.
3. Record laboratory practicals, viva scores, and equipment allocations in Labs.
4. Log positive houses/merit commendations and pastoral behaviour interventions cleanly with guardian visibility controls.

Operator Best Practice: All assignment and quiz scores flow directly into Gradebook weightages when configured by the Examination Cell.

CHAPTER 10 · WORKSPACE 02 · EXAMINATIONS

Examinations, Gradebook, CBCS Credits, Hall Tickets & QR Transcripts

Execute school report cards and college semester CBCS evaluations with QR verification.



STEP-BY-STEP OPERATING PROCEDURE

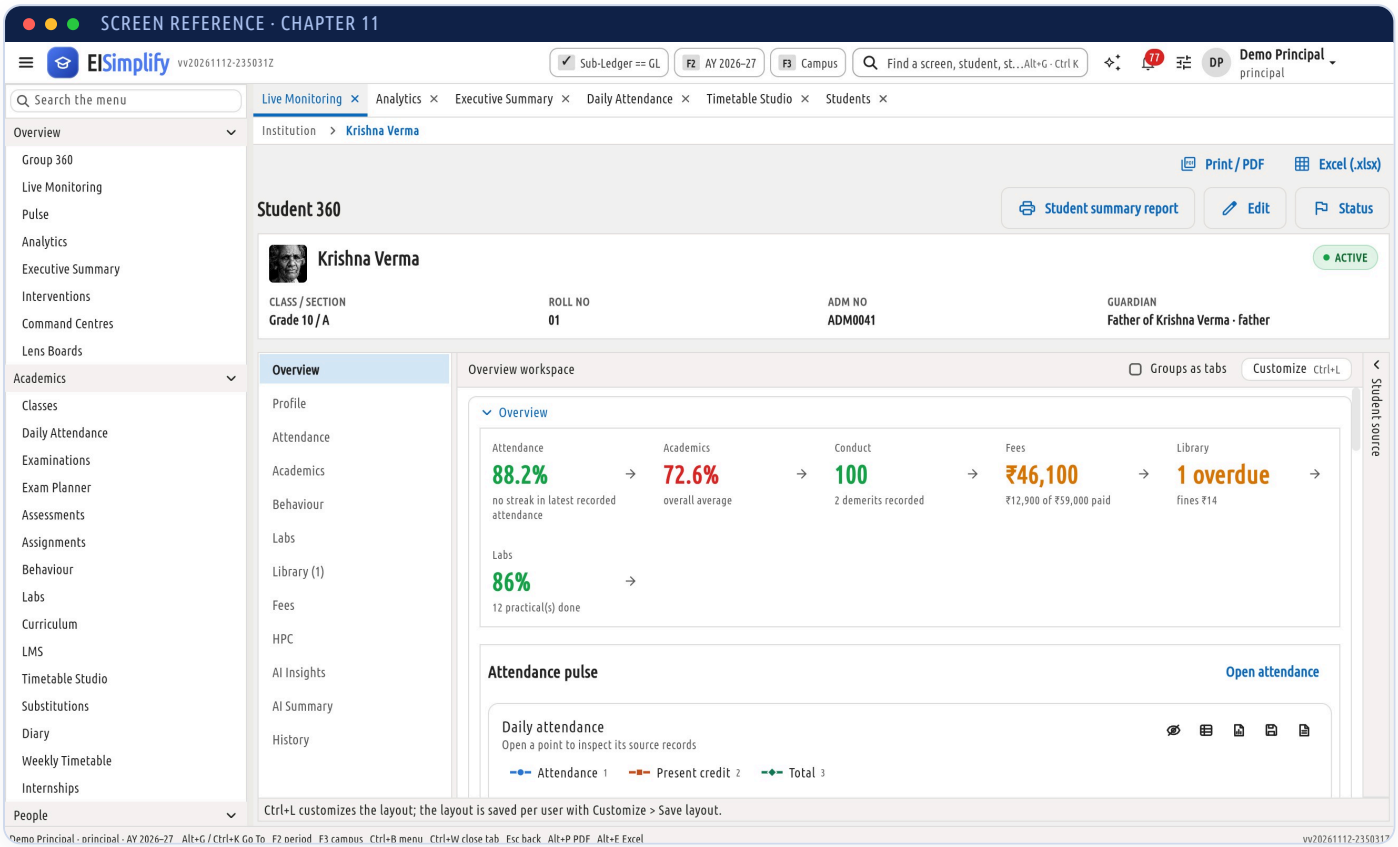
1. Create assessment cycles in Examinations, assign rooms and invigilation duties, and print batch Hall Tickets.
2. Enter or upload marks inside Gradebook with moderation workflows and automatic SGPA/CGPA computation under CBCS.
3. Open Transcripts to inspect formatted marksheets in Direct A4 PDF Preview before releasing them to Student & Parent portals.
4. Issue Bonafide, Transfer, Study, and Character Certificates carrying cryptographic QR verification codes.

Operator Best Practice: Every marks modification after publication records a locked audit entry showing the moderator, timestamp, and reason.

CHAPTER 11 · WORKSPACE 03 · PEOPLE & 360

Student Master Directory, Student 360° Longitudinal Profile & Admissions CRM

Manage the entire student lifecycle from initial walk-in inquiry to alumni graduation.



STEP-BY-STEP OPERATING PROCEDURE

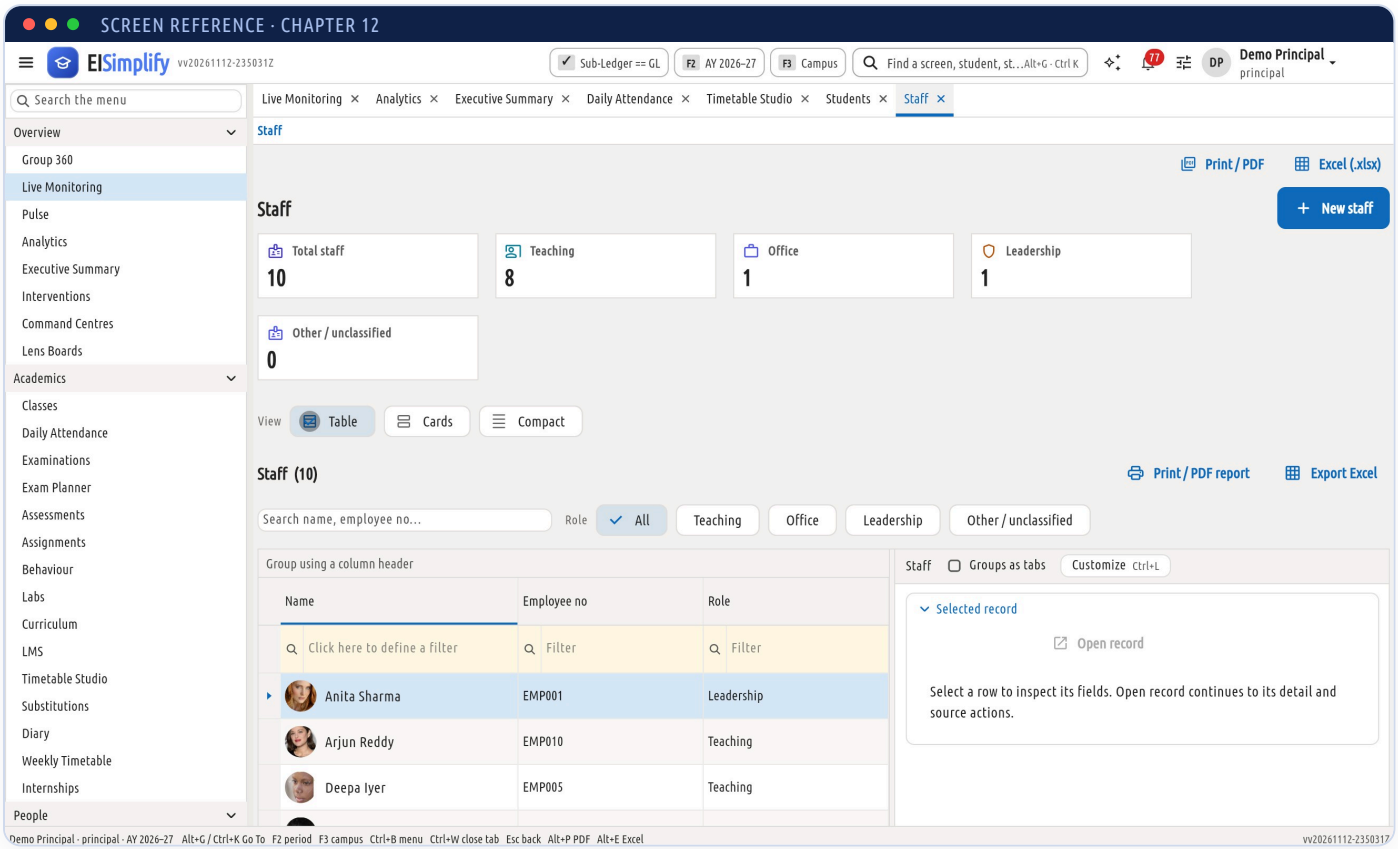
1. Capture enquiries and entrance scores in Admissions CRM; use Admissions OCR to extract applicant fields quickly from IDs.
2. Convert admitted applicants into enrolled learners in one click — automatically assigning roll numbers, houses, fee schedules, and parent logins.
3. Open Student 360° on any learner to inspect attendance, exam marks, fee dues, guardian contacts, APAAR/ABC IDs, health notes, and DPDP consent shields.
4. Bulk filter and group students inside Student Master Directory and export or print custom rosters with Alt+P / Alt+E.

Operator Best Practice: Look for the Section 9 Minor Consent Shield banner at the top of Student 360° profiles for learners under 18.

CHAPTER 12 · WORKSPACE 03 · FACULTY & HR

Staff Directory, Service HR Records, Leave Workflows & Alumni

Centralise faculty credentials, leave approvals, automatic coverage, and lifelong alumni engagement.



STEP-BY-STEP OPERATING PROCEDURE

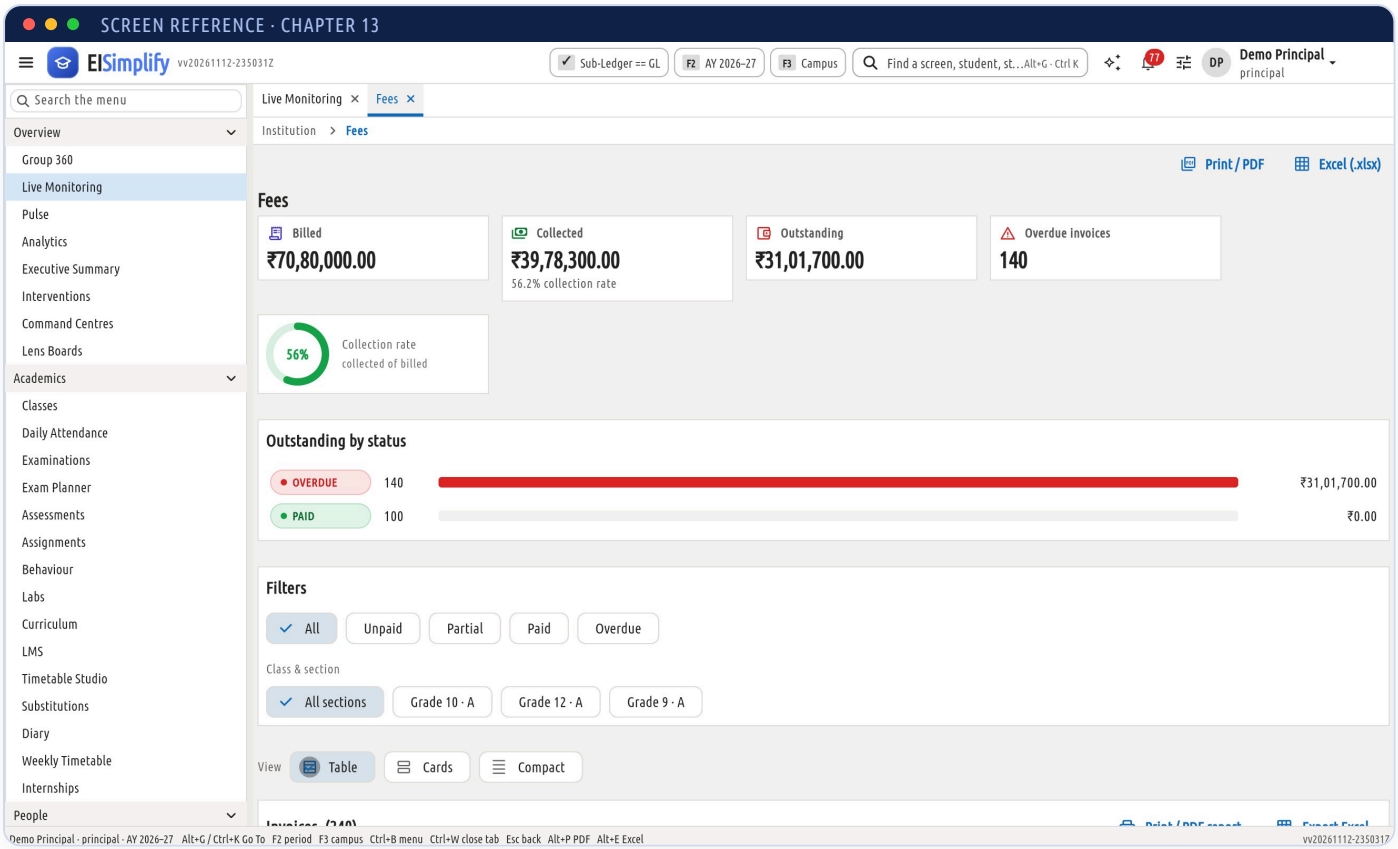
1. Maintain complete teaching and non-teaching credentials, PAN, bank accounts (masked in UI), and subject qualifications under Staff Directory.
2. Track CL, SL, and EL leave balances; staff apply directly via web or Android and principals approve in one tap.
3. Check Staff Coverage Radar whenever leaves are approved so uncovered classes receive substitutes immediately.
4. Engage former students through the Alumni Directory for mentorship sessions and endowment drives.

Operator Best Practice: Approved leave counts sync directly with monthly Payroll attendance deductions when applicable.

CHAPTER 13 · WORKSPACE 04 · FINANCE

Fee Structures, Invoicing, Online Payments, Aging & NSP Concessions

Collect tuition, bus, and hostel fees cleanly with instant receipts and drill-down aging follow-up.



STEP-BY-STEP OPERATING PROCEDURE

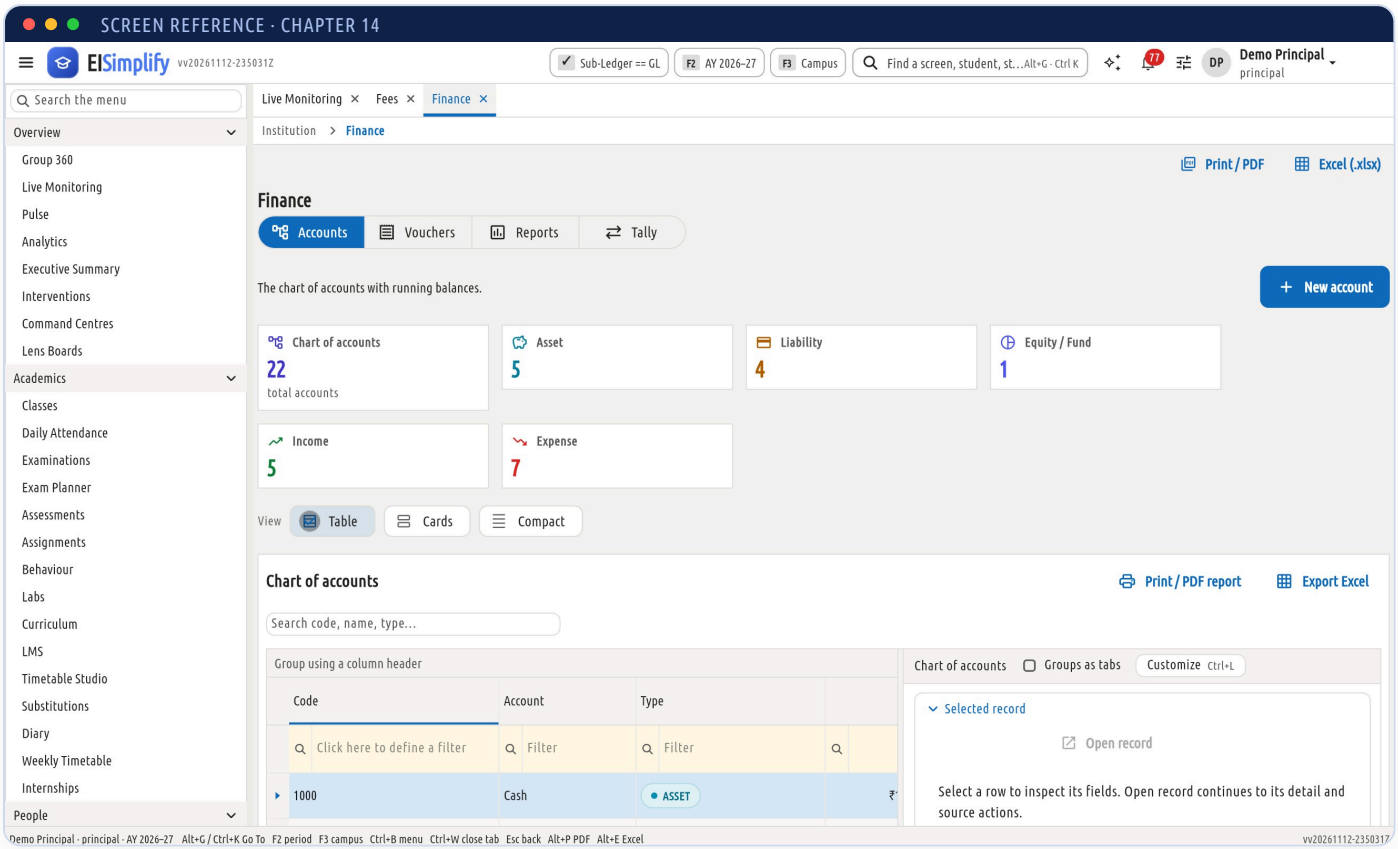
1. Define class-wise fee heads, term due dates, and late-fee rules under Finance -> Fees.
2. Generate bulk term invoices and enable parents to pay online directly inside the web or Android portal with instant receipts.
3. Record counter cash, cheque, UPI, or NEFT settlements manually when received at the school office.
4. Manage sibling discounts, merit waivers, and NSP/government scholarship concessions with rule-based approvals.

Operator Best Practice: Click any overdue bucket bar in Fee Velocity to list the exact pending students and dispatch reminders.

CHAPTER 14 · WORKSPACE 04 · ACCOUNTING & PAYROLL

Double-Entry General Ledger, Trial Balance, Budgets, POs & Payroll

Keep books audit-ready year-round with zero-variance control reconciliation and monthly period locks.



STEP-BY-STEP OPERATING PROCEDURE

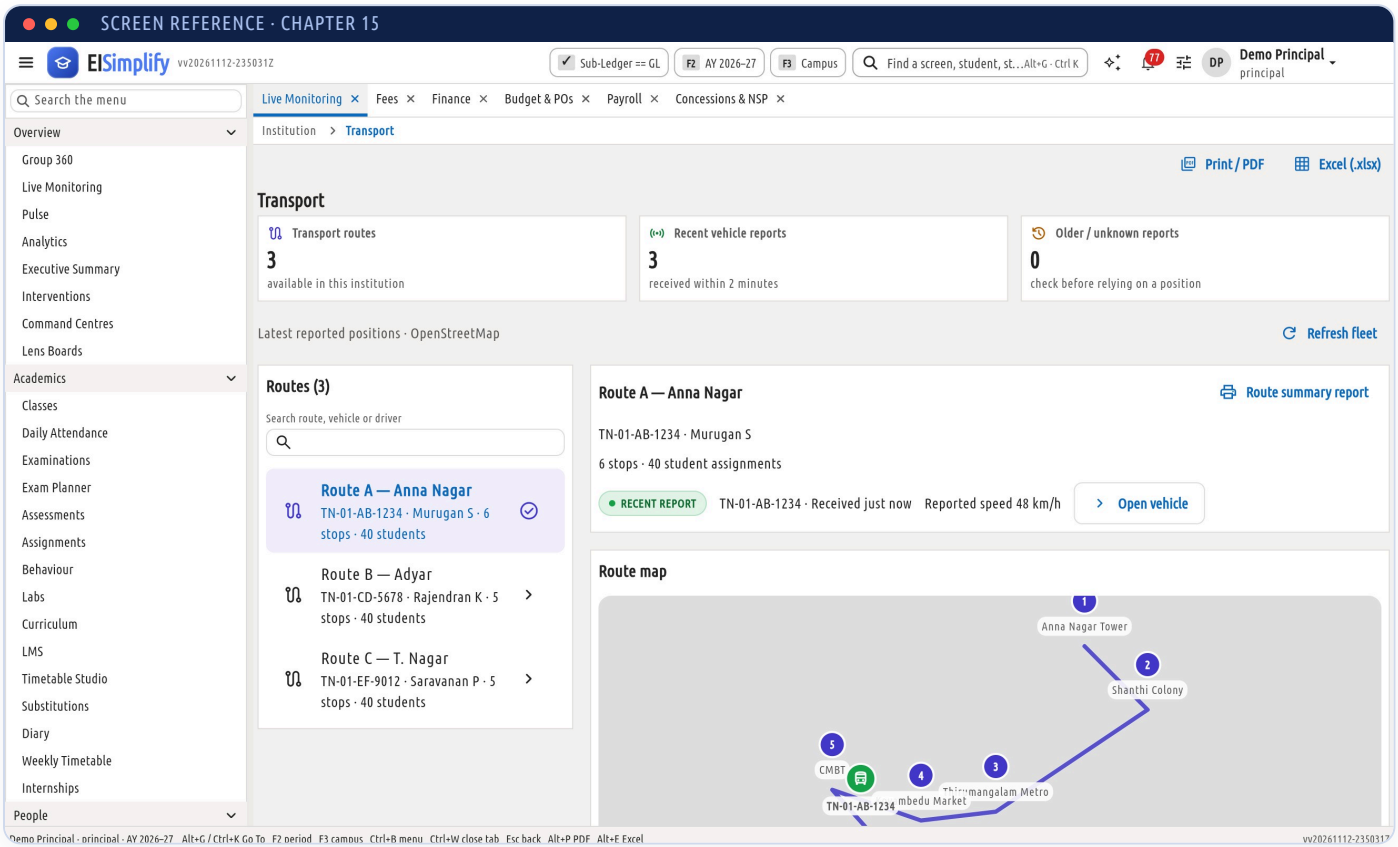
1. Monitor automated double-entry postings triggered in real time by every fee receipt, refund, vendor bill, and payroll run.
2. Review Trial Balance, Income & Expenditure, and Cash/Bank Books; click any group or account to drill straight down to vouchers.
3. Enforce departmental spending limits using Budgets & Purchase Orders before vendor disbursements.
4. Run Payroll each month to compute basic, allowances, PF, ESI, PT, TDS, bank advice files, and printable A4 payslips.

Operator Best Practice: Close financial months securely with Fiscal Period Locks to prevent accidental backdated entries prior to statutory audit.

CHAPTER 15 · WORKSPACE 05 · CAMPUS OPERATIONS

GPS Fleet Tracking, Hostel, Barcode Library, Inventory, Canteen & Gate Kiosk

Run physical campus operations live using OpenStreetMap routes, RFID/barcode workflows, and gate security.



STEP-BY-STEP OPERATING PROCEDURE

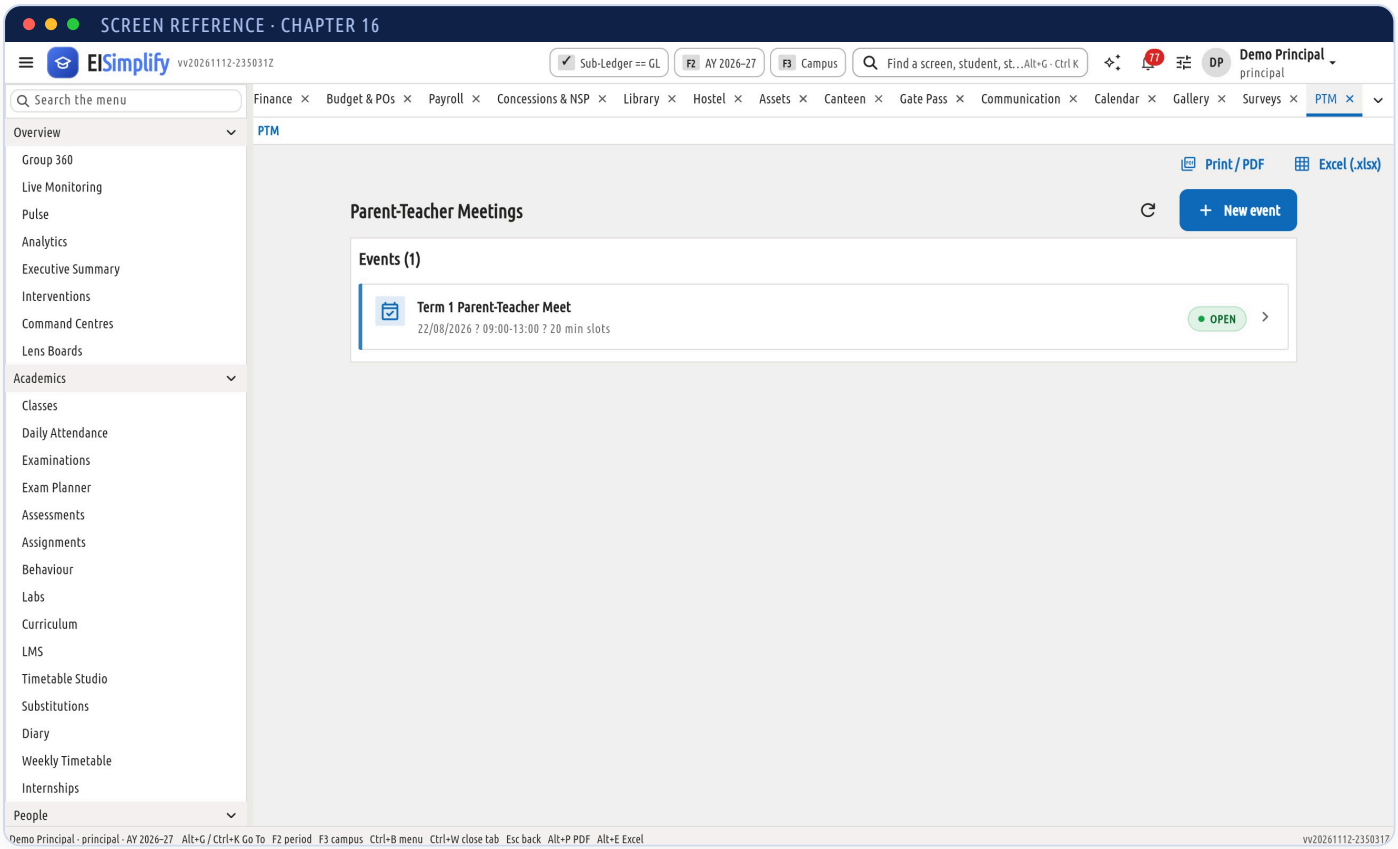
1. Monitor live bus locations, stops, pickup geofences, and driver logs on keyless OpenStreetMap tiles under Transport.
2. Issue and return books in seconds using barcode scan codes in Library Circulation and manage fine settlements.
3. Assign hostel buildings, rooms, beds, mess plans, and warden check-ins under Hostel & Assets/Inventory.
4. Operate cashless Canteen Wallets and biometric-capable Gate Kiosk visitor/student passes for campus safety.

Operator Best Practice: Security personnel logging in with the Security role land directly on the streamlined Gate Kiosk interface.

CHAPTER 16 · WORKSPACE 05 · COMMUNICATION

Announcements, Homework Diary, Academic Calendar, PTM & Surveys

Replace ad-hoc messaging groups with auditable, acknowledged institutional communication.



STEP-BY-STEP OPERATING PROCEDURE

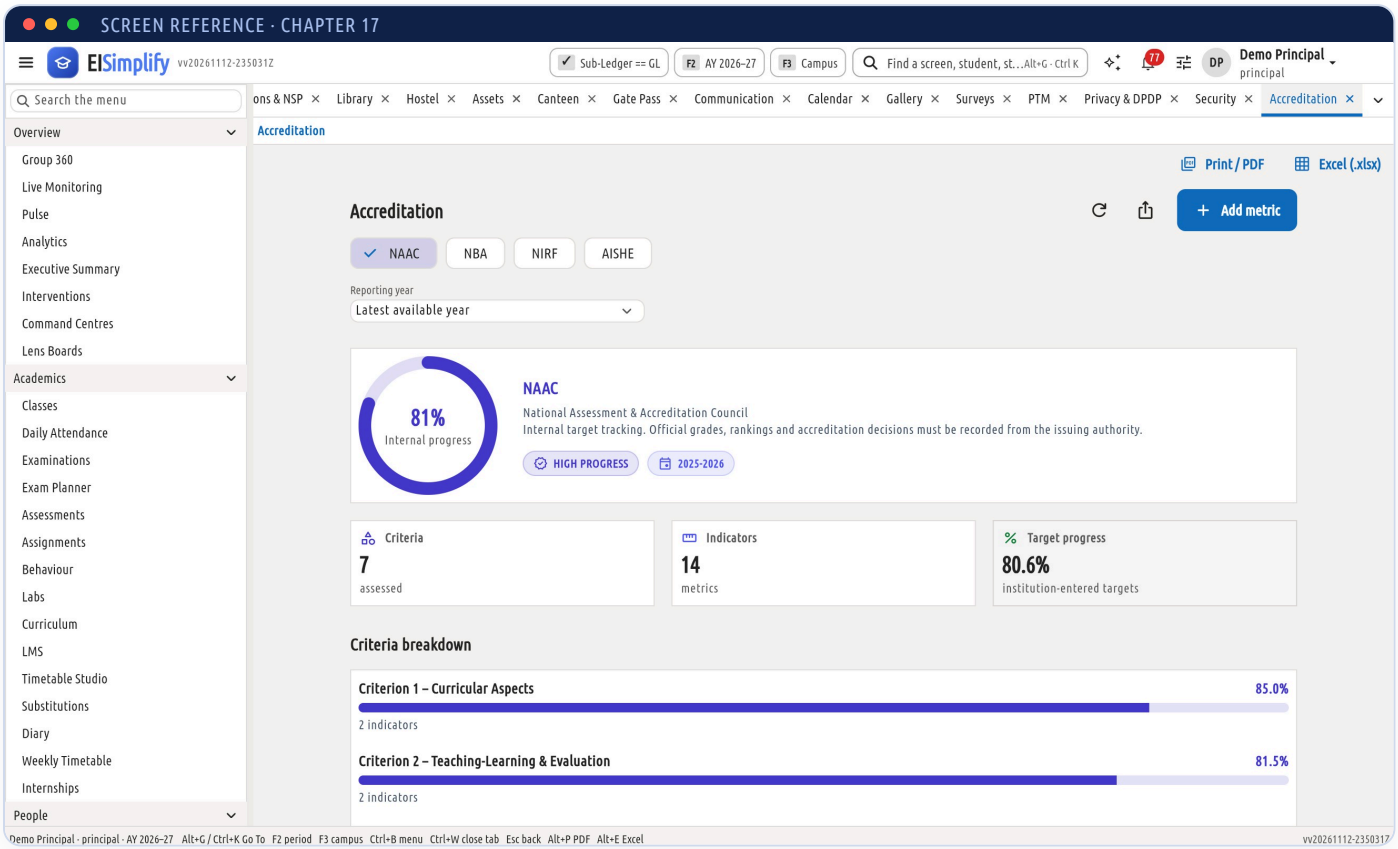
1. Publish targeted circulars and event invitations to specific grades, sections, routes, or all staff via Announcements & Gallery.
2. Faculty post daily homework entries inside Diary and view parent read/acknowledgement timestamps.
3. Configure Parent-Teacher Meeting (PTM) time slots and allow guardians to self-book appointments cleanly.
4. Collect structured feedback from parents, students, and faculty through Surveys with summary drill-down.

Operator Best Practice: Critical circulars automatically dispatch multi-channel alerts across Android push, email, and SMS/WhatsApp gateways.

CHAPTER 17 · WORKSPACE 05 · STUDENT WELFARE

NSS, NCC, Co-Curricular Activities, Scholarships, Infirmary & Counselling

Nurture holistic learner wellbeing while tracking statutory NSS/NCC hours and scholarship disbursements.



STEP-BY-STEP OPERATING PROCEDURE

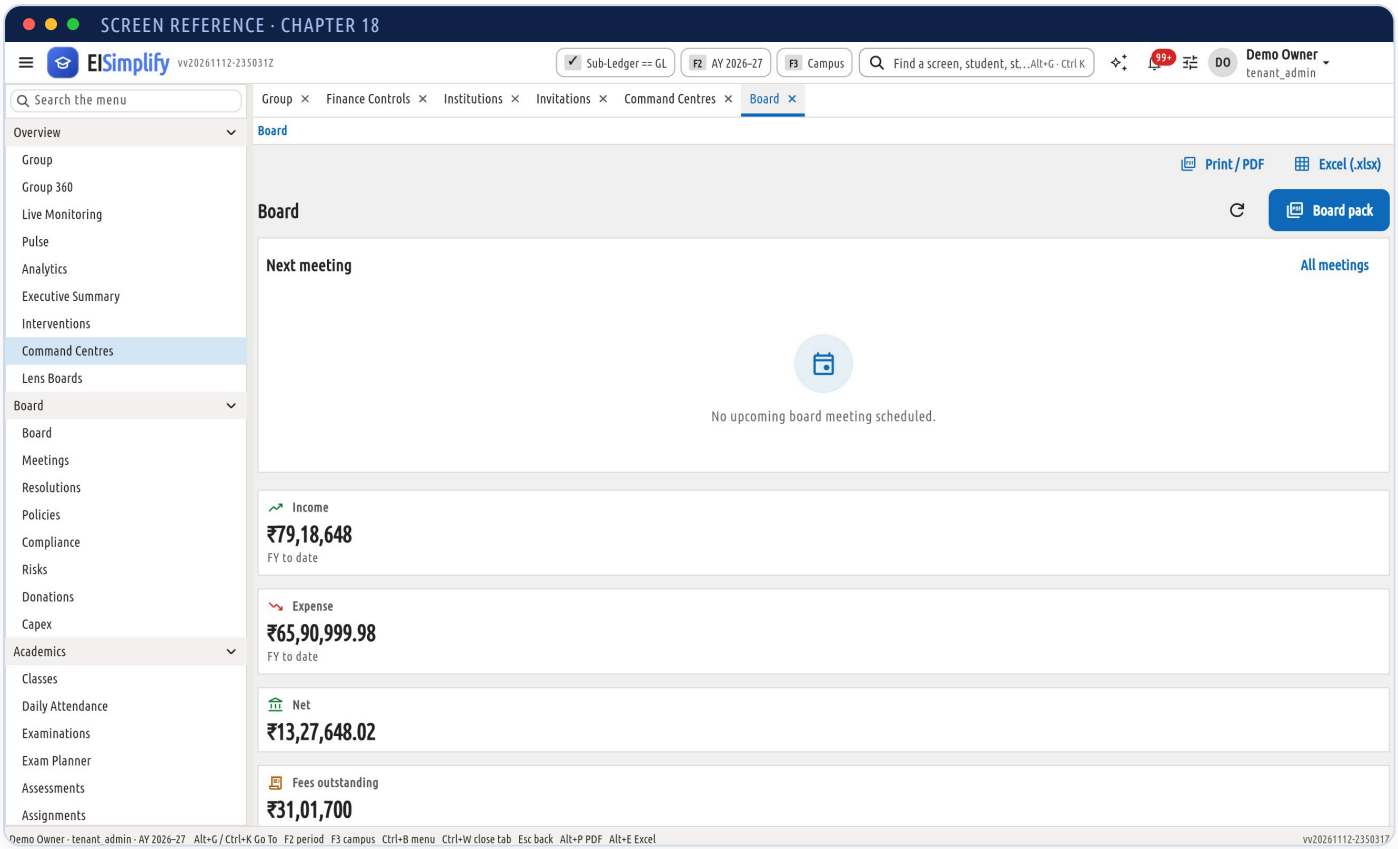
1. Log student volunteer hours, camps, and certificates for NSS and NCC units and export accreditation summaries.
2. Track sports, house competitions, cultural achievements, and club participation cleanly on Student 360°.
3. Maintain strictly confidential campus medical infirmary visits, immunisation alerts, and emergency contacts under Health.
4. Schedule pastoral counselling follow-ups with restricted role-gated visibility.

Operator Best Practice: Health and counselling notes are safeguarded as sensitive personal data tables under Workspace 6 privacy controls.

CHAPTER 18 · WORKSPACE 06 · GOVERNANCE & BOARD

Board of Trustees Vault, Committees, Resolutions, Policies, Risks & Capex

Give trustees fiduciary clarity with digital board packs, quorum attendance, signed resolutions, and infrastructure tracking.



STEP-BY-STEP OPERATING PROCEDURE

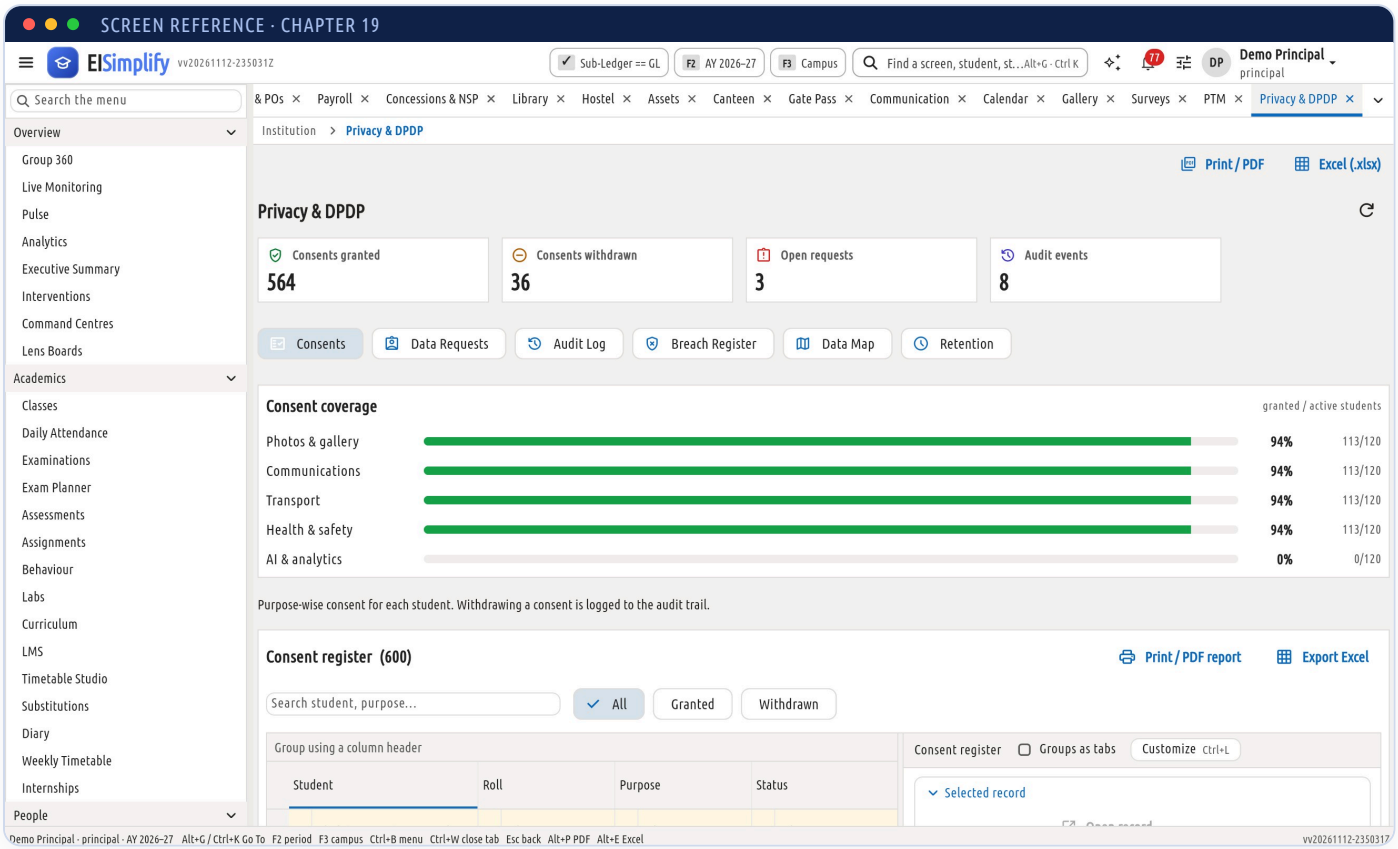
1. Open Board Dashboard for trust-wide health across student enrolments, net surplus, statutory filings, and capital expenditure.
2. Organise Academic, Finance, Audit, and Building committees, issue meeting packs, and record formal Minutes & Resolutions.
3. Publish version-controlled institutional Policies (Child Safety, HR, Fee, IT) and track affiliation NOC renewals in Compliance.
4. Oversee restricted scholarship Endowments, Alumni Donations, Risk Heatmaps, and construction Capex milestones.

Operator Best Practice: Trustees log into a clean fiduciary view without everyday classroom or clerical clutter.

CHAPTER 19 · WORKSPACE 06 · DPDP ACT 2023

DPDP Act 2023 & Rules 2025 Operations Guide (DPO, Notices & Breach SLA)

Operate full statutory privacy compliance across 24 personal data tables, 5 Eighth-Schedule languages, and 72-hour breach timers.



STEP-BY-STEP OPERATING PROCEDURE

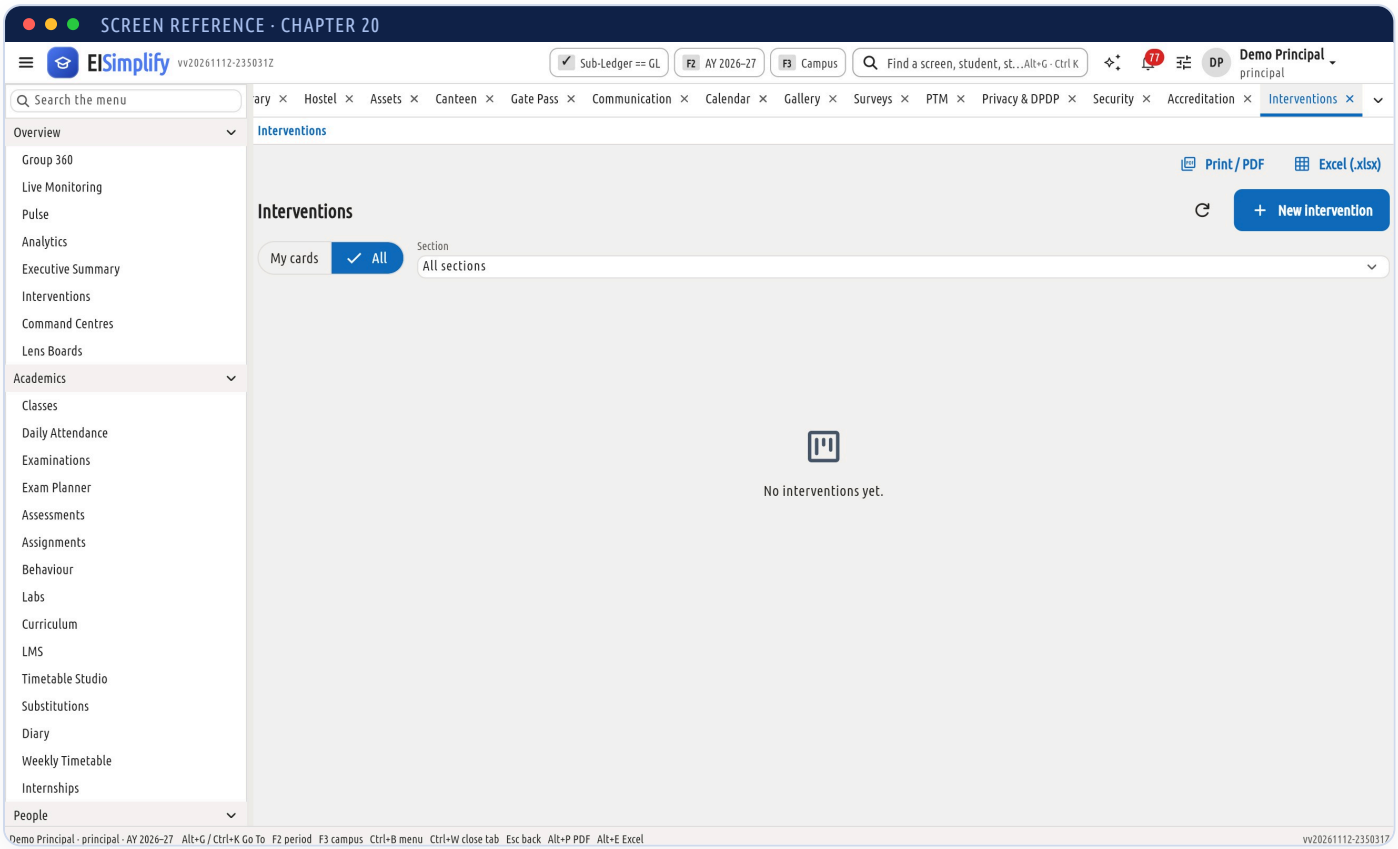
1. Configure your Data Protection Officer details (/api/privacy/dpo-info) and publish Eighth-Schedule privacy notices in English, Hindi, Tamil, Marathi, or Kannada.
2. Enforce Section 9 verifiable parental/guardian consent for all learners under 18 before optional analytics or media use.
3. Toggle PII Masking anytime to mask Aadhaar, APAAR, PAN, bank account, and phone numbers in shared office views.
4. Process Data Principal Rights requests (access summary, 24-table portability export, correction, erasure) and monitor the 72-hour DPB breach SLA countdown.

Operator Best Practice: Every export from a PII-bearing screen triggers a DPDP Section 8(4) accountability prompt and logs to the immutable audit trail.

CHAPTER 20 · AI, MOBILE & ADMINISTRATION

Ask EI-Simplify AI, Native Android v3.0 App, Backups & Support SLA

Get instant ledger-backed answers, stay connected on Android, and rely on India-hosted encrypted backups.



STEP-BY-STEP OPERATING PROCEDURE

1. Open Ask EI-Simplify to query enrolments, fee collections, attendance anomalies, and defaulters in plain English.
2. Download the Native Android v3.0 APK directly from https://eisimplify.com/eisimplify.apk for faculty, parents, students, and bus staff.
3. All institutional databases run on ISO 27001 India infrastructure with daily encrypted 30-day rolling backups and JWT + TOTP security.
4. Need help? Starter receives Community support, Standard 24h email, Premium 4h phone/WhatsApp, and Enterprise 1h emergency SLA via support@eisimplify.com.

Operator Best Practice: Always quote your Build Version badge shown in Settings when requesting priority assistance.