PFMS Signatory Configuration
User Manual

Prepared for
PFMS, Controller General of Accounts
Ministry of Finance
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Version 1.0

Prepared by
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Revision and Signoff Sheet

Change Record

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Reviewers

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User Manual for Signatory Configuration

1 Introduction

The purpose of this document is to present step-wise guide for all the steps involved in Signatory Configuration at PFMS portal. Signatory Configuration at PFMS is required to authenticate payments by configured signatories to ensure timely payments under a scheme for a financial year.

2 Activate Account E-Payment

2.1 User Login

Agency ADMIN user shall enter valid ‘Login Id’ and ‘Password’ and click ‘Login’.

Note: Message will be displayed in case login credential are incorrect or invalid.
At home page, select ‘Account Activation E-payment’ under ‘Bank’ from main menu on left hand side.

![Figure 2: E-Payment Account Activation](image1)

On the screen that follows, select ‘Scheme’, enter ‘Account Number’ and click ‘Search’ button to view results and proceed.

![Figure 3: Add New Scheme](image2)
At this screen, select the check box under header 'Select' and Select 'Account Activation Type' from drop-down list. Click ‘Submit’ save the selected account activation details in database. A particular account activation type can be selected only once for the selected E-payment account.

Success message shall be displayed on the screen, once the concerned account is activated successfully for e-payment.

E-Payment account activation is now complete and successful. The concerned activated account shall be visible for signatory configuration.
3 Signatory Configuration

Agency ADMIN user shall perform Signatory Configuration for concerned activated account for e-payment under a scheme.

ADMIN user shall select ‘Signatory Configuration’ under ‘Bank’ from main menu to proceed with signatory configuration at PFMS.

At this screen, select ‘Scheme’ and ‘Account Number’ for which Signatory Configuration is to be done. No navigation shall take place.
At this screen, click ‘+’ in the displayed grid to add signatory level for concerned amount limit. On clicking ‘+’, a new row in the grid will appear wherein user shall select signatory level and enter signatory details.

Click Save icon on right hand side in the grid to save and add the concerned signatory.

Figure 8: Add Signatory

Message shall be displayed on the screen once the signatory level is added successfully. The added signatory level shall be reflected in the grid on the same screen.

Figure 9: Signatory Added Successfully
3.1 Sign Account Enrolment File

Once the signatory configuration for scheme is done, a sample account enrolment file is to be signed by Signatory Level 1.

Concerned Signatory Level 1 user shall login at PFMS and select ‘Enrol Account DSC’ under ‘Bank’ from main menu. User shall be navigated to ‘Sign Account Enrolment File’ screen.

At this screen, user select the radio button available in the grid in first column for the concerned file. Now, click ‘Sign Enrolment File’ button in last column of the grid to proceed and digitally sign the file. Similarly, all configured Signatory Level users have to sign the account enrolment file.