User Manual for Data Collector Application

How to start?

To submit the data in prescribed form, open the URL: https://datacollector.rbi.org.in in internet browser like Mozilla Firefox or Internet Explorer (7.0 or above). (Best viewed in 1024 x 736 resolution). This will open a data collector login page in the internet browser.

Now enter your login credentials on the login screen of the data collector application. As a security measure, you need to change the default password (sent to your email id by RBI) at the first login as per the password policy set by RBI:

Password Policy

1. Minimum length of the password should be 8 characters.
2. It should not contain any blank or space
3. Password should contain the following
    a. At least one upper case letter
    b. At least one lower case letter
    c. At least one numeral out of 0, 1, 2, 3…, 9
    d. At least one special character out of @, #, $
4. Password will expire every 30 days (unless intimated by RBI). Therefore, you will require changing the same every 30 days.
5. You cannot use the last 3 passwords while changing password.
6. Do not share the login id and password with other

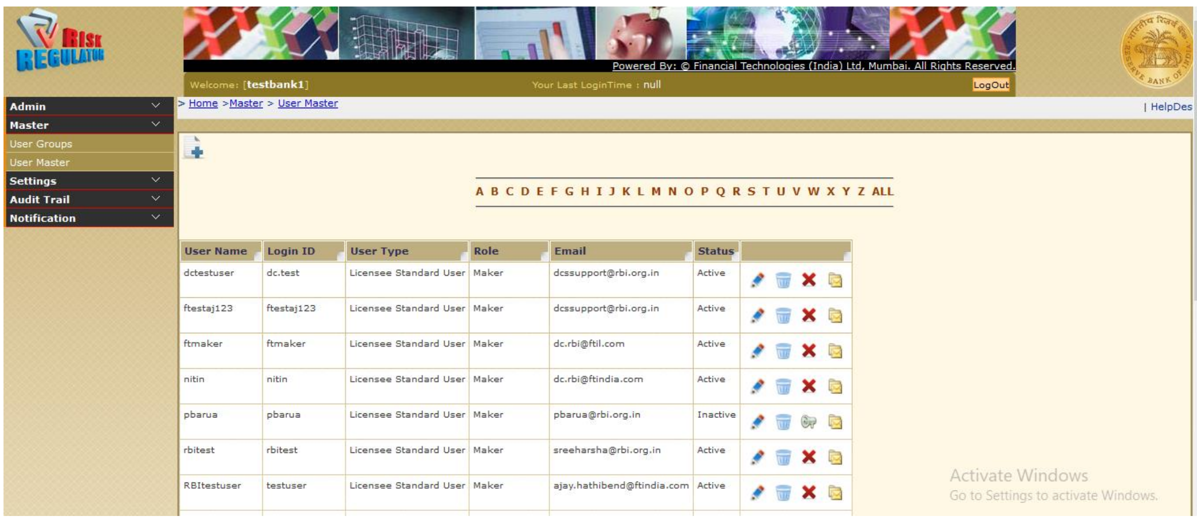
If you have forgotten password for your login id, kindly click on the **Forgot Password** link on Login page. After you click on the link, it will ask you to enter your login id. After you've entered login id, click **next**. This will reset your password and the same will be sent to your email id.

After successfully changing your password, system will redirect you to login screen, please enter your login id with new password to login into the system.

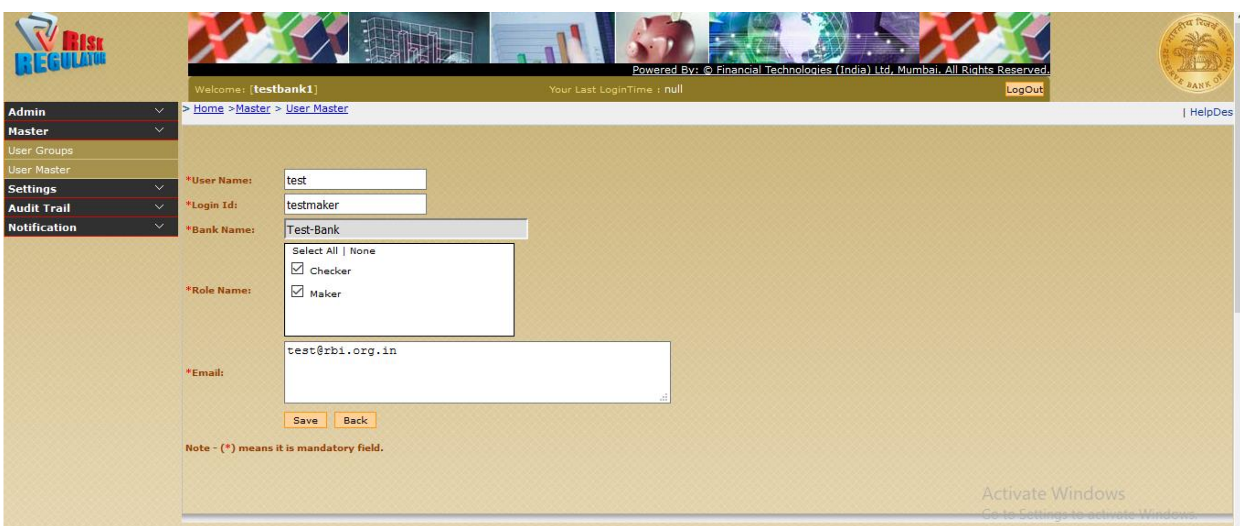
INSTRUCTIONS FOR BANK ADMIN USER

Creation of maker and checker user.

1) Login into Datacollector application.
2) Click on Master menu >> User Master for user creation
3) Click on + (Plus button) to create a new user.

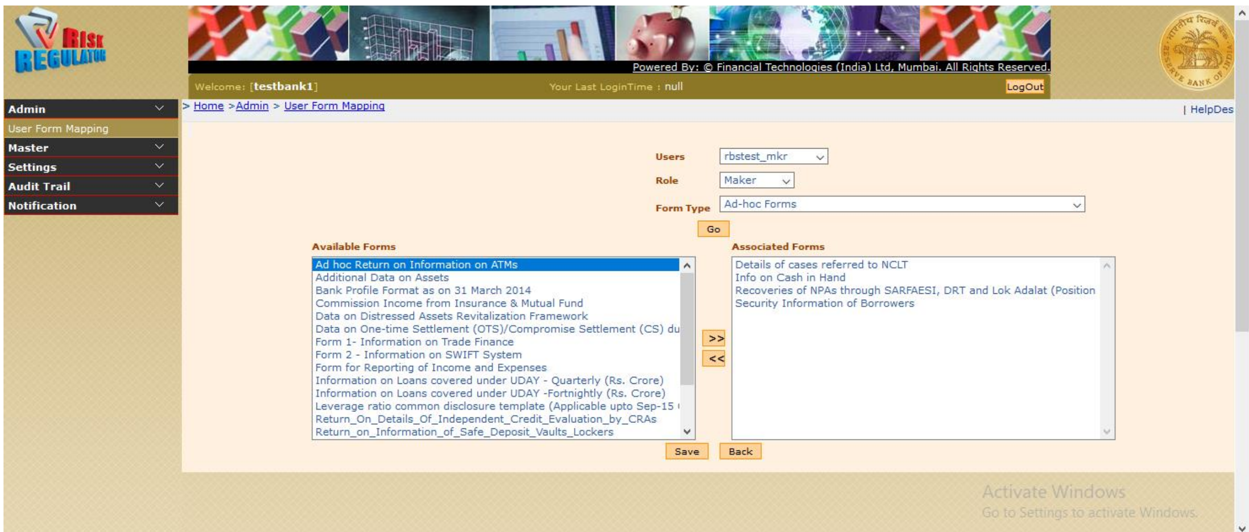


4) Fill the form as per screenshot create new user and click on save button.



Return mapping to maker and checker user.

1) Click on Admin >> User Form Mapping option.
2) Select user ID, role, Form Type as per screenshot.
3) Select Return in Available forms and click >> to map the return or << to unmap the return.



INSTRUCTIONS FOR BANK MAKER USER

Once successfully logged into the system, please allow system to load your default page. Now please follow the instruction given below to submit the data:

1. There are number of menu items available on the left hand side. Please click on **Return Filling** menu. It will expand and display a number of sub-menus available for your user profile.
2. Now click on **Submit Returns data**. Allow system to load the page to submit your data.
3. In this page you have the following items for selection
    a. **Bank Type:** This is the bank type; you do not need the change this value.
    b. **Bank Sub Type:** This is the bank sub type; you do not need the change this value.
    c. **Bank Name:** This is your bank's name; you do not need the change this value.
    d. **Form Type:** This is the type of form which you are asked to submit. Select the appropriate value available in the drop down box.
    e. **Form Name:** This is the name of form which you are asked to submit. Select the appropriate value available in the drop down box.
    f. **Frequency:** This is the frequency applicable for the form. Select the appropriate frequency as applicable to the form you have selected in the above drop down box.
    g. **Year:** This is the fiscal year for which you are going to submit data. E.g., you want to submit data for fiscal year 2009-10, please select the year 2009-10.
    h. **Period:** This displays the periods available for the frequency and year selected above. Select the applicable period available in the drop down box.
        i. For frequency **annual**, there is only one period called **A** (annual) is available;
        ii. for frequency **half year**, there are two periods called **H1** (half year 1: From April to Sept of the year selected in year drop down box) and **H2** is available (half year 2: From Sept of the year selected in year drop down box to March of next year of year selected in the drop down box);
        iii. And so on for frequency quarterly and monthly, weekly, Daily
    i. **Period End Date:** Once you have selected frequency, year and period, this field will automatically become available for your preview. *Do not change this value unless until asked by RBI to do so. You will be at risk of losing your data from RBI official's preview if you change this value.*
    j. **Due Date:** You should submit data by the date mentioned here. In case you submit data after this date, it will be marked as *late submission* and will be treated accordingly by RBI.
    k. **Currency:** This display the list of currency with default currency selected. You do not need to change this value unless until asked by RBI or mentioned in email.

- **l. Scale Factor:** This is the scale factor for amount figures (if present in form) which you are submitting. There is a default value selected. You do not need to change this value unless until asked by RBI or mentioned in email.
- **m. Click to get the form: C**lick on this button to fetch the form selected as per the above selected criteria. This will load the selected form. This may take some time depending on the size of form and speed of your internet connection.

4. Now you have the form available on this page. You may submit data either entering the value directly on screen (this is suitable when you have very limited data items in the form or you can say small form) or using excel import. Follow the instructions mentioned below:
    a. **Direct Data Entry on Screen:** Please enter the data against the items available in the form. Please not that you are not allowed to enter data in the grey field. Theses grey field items could be either a derived field or item heads.
    b. **Excel Import:** This will allow you to submit data in .xls format. Please follow the instructions given below:
        i. Click on the **Export Template** button. After clicking, it will ask you to open the file or save the file. Click on save the file. This will save the file on your PC.
        ii. Now open the exported .xls file in MS Office Excel.
        iii. Enter the data in appropriate cells against each data items available in the .xls form.
        iv. Once entered all the values, save the same.
        v. Now click on the **Import Template** button. After clicking on this button, it asks you to browse the saved file. Please browse the saved .xls file and click on **Import** button. Clicking on this button will import your data from .xls file to form available on screen.
5. Now check your data in the form on the page.
6. Click on compute button and check the computed fields, if any in the form.
7. Once you checked your data, submit the data by clicking on **Send for Validation** button. This will start checking for inconsistency, if any. Please allow system to submit the data.

INSTRUCTIONS FOR BANK CHECKER USER

Once successfully logged into the system, please allow system to load your default page. Now please follow the instruction given below to submit the data:

1. There are number of menu items available on the left hand side. Please click on **Return Filling** menu. It will expand and display a number of sub-menus available for your user profile.
2. Now click on **Validate Returns data**. Allow system to load the page to submit your data.
3. In this page you have the following items for selection
    a. **Bank Type:** This is the bank type; you do not need the change this value.
    b. **Bank Sub Type:** This is the bank sub type; you do not need the change this value.
    c. **Bank Name:** This is your bank's name; you do not need the change this value.
    d. **Form Type:** This is the type of form which you are asked to submit. Select the appropriate value available in the drop down box.
    e. **Form Name:** This is the name of form which you are asked to submit. Select the appropriate value available in the drop down box.
    f. **Frequency:** This is the frequency applicable for the form. Select the appropriate frequency as applicable to the form you have selected in the above drop down box.
    g. **Year:** This is the fiscal year for which you are going to submit data. E.g., you want to submit data for fiscal year 2009-10, please select the year 2009-10.
    h. **Period:** This displays the periods available for the frequency and year selected above. Select the applicable period available in the drop down box.
        i. For frequency **annual**, there is only one period called **A** (annual) is available;
        ii. for frequency **half year**, there are two periods called **H1** (half year 1: From April to Sept of the year selected in year drop down box) and **H2** is available (half year 2: From Sept of the year selected in year drop down box to March of next year of year selected in the drop down box);
        iii. And so on for frequency quarterly and monthly, weekly, Daily
    i. **Period End Date:** Once you have selected frequency, year and period, this field will automatically become available for your preview. *Do not change this value unless until asked by RBI to do so. You will be at risk of losing your data from RBI official's preview if you change this value.*
    j. **Due Date:** You should submit data by the date mentioned here. In case you submit data after this date, it will be marked as *late submission* and will be treated accordingly by RBI.
    k. **Currency:** This display the list of currency with default currency selected. You do not need to change this value unless until asked by RBI or mentioned in email.
    l. **Scale Factor:** This is the scale factor for amount figures (if present in form) which you are submitting. There is a default value selected. You do not need to change this value unless until asked by RBI or mentioned in email.

- m. **Click to get the form: C**lick on this button to fetch the form selected as per the above selected criteria. This will load the selected form. This may take some time depending on the size of form and speed of your internet connection.

4. Now you have the form available on this page with data submitted by checker user. Follow the instructions mentioned below:
   a. **Final:** Click on Final button to submit the data to RBI
   b. **Reject:** This will allow you to send the data back to Maker user for making correction in the data.
5. After successful submission of data, system will generate an acknowledgement number and send to the email id of checker user.

6. The system will pop up the report with data. You can save the report in PDF or excel format or user can send data through mail also.

Change Password

In case you want to change the password for your login id, click on the **Settings** menu and then on **Change Password** submenu. This will open a page where you can enter your old password and new password. After successful authentication it will change the password and will take you to login screen to login with new password.

If you want to change home page for your login id (which you'll see after the login), click on the **Settings** menu and then on **Default Page** submenu. This will open a page where you can see the list of page you're allowed to view. Click on the appropriate page. This will reset your home page. This will take effect in your next login.