

ItCompletes.™

SUPPORT BUSINESS APPLICATION

**User Manual**

Version 1.0

Date: January 2010

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## Revision History

Date	Version	Description	Author
15/01/2010	1.0	First Version	Urooj Seemeen

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## General Information

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## 1 GENERAL INFORMATION

### 1.1 System Overview

This User's Manual provides the information necessary for the user to effectively use the system. SBA is a client server application. The purpose of this application is to support and automate organization's business activities. The major functions perform by the system are cross departmental activities in the organization. This application is design to perform processes which are required for decision or actions in the organization. The User access mode is GUI i.e. graphical user interface that is why it is very easy to use; each process is just a click away. An employee can perform activities/actions using SBA. In SBA workflow, each personal can mark his/her notes and the notes history will be available at every point. Each document that is required to be attached will be scanned from physical file and the scanned image will be attached with electronic file.

#### 1.1.1 System Name

SUPPORT BUSINESS APPLICATION

#### 1.1.2 System Category

*Major application:*

SBA is based on one of the leading world class Open Source ERP solution, ADempiere. ADempiere is a robust and stable solution as it is proven by the hundreds of its implementations around the world. However there are a set of differences with proprietary world class ERP's that make ADempiere unique. ADempiere provides:

- Role Based Security: Each interacting User of ADempiere must have a Role. His/her allowed activities are determined through the Roles the user has assigned.
- Secure Administration: ADempiere provides multi level administration, specified by to roles; each user would only be allowed to administer the resources s/he has the rights for.
- Audit trails and Logging: ADempiere provides advance logging and audit trail
- Advance Customization Interface: ADempiere goes beyond basic customization, and provides advance out of the box WSYSIG customization of the application.

## 1.0 General Information

SBA is divided into different modules; it also manages the workflow between each module and different users. SBA has following Modules:

- Leave Management
- General Administration
- Payroll Management
- Human Resource Management
- Finance Department
- Loan Management
- Medical Management
- Law Department
- GPF Management
- CPF Management
- Income Tax Management
- Board Secretariat

Each main module is further divided into sub modules and setup tables. User has to complete all the setup tables before performing any action in the application. The main modules are Setup [HRM] & EM modules which are sub modules of HRM. All other modules are connected with Employee Management because Employee is the basic entity.

### *Common Depiction:*

SBA provides a complete application-level security infrastructure, supporting role, data security, data encryption and auditing. These comprehensive security features enables the application architect to implement security policies that protect your valuable corporate data from inappropriate or unlawful access while enabling your trusted employees to effectively do their jobs. Security policies are extremely flexible and are defined without programming by system administrator. SBA also manages automated workflows. ADempiere has Workflow Management Coalition and Object Management Group (OMG) standards based Workflow

## 1.0 General Information

engine which is utilized to provide Business Process Management. The workflows are made according to the prevailing processes in the organization.

### 1.1.3 Operational status

Operational	✓
Under development	-
Undergoing a major modification	-

### 1.1.4 General description

SBA system is cross-functional and enterprise-wide. All functional departments that are involved in operations or production are integrated in one system. In addition to areas such as manufacturing, warehousing, logistics, and information technology, it also includes accounting, human resources, marketing and strategic management.

SBA delivers a single database that contains all data for the various software modules that typically address areas such as Manufacturing (Engineering, bills of material, scheduling, capacity, workflow management, quality control, cost management, manufacturing process, manufacturing projects, manufacturing flow), Supply chain management (Order to cash, inventory, order entry, purchasing, product configuration, supply chain planning, supplier scheduling, inspection of goods, claim processing, commission calculation), Financials (General ledger, cash management, accounts payable, accounts receivable, fixed assets), Project management (Costing, billing, time and expense, performance units, activity management), Human resources (Human resources, payroll, training, time and attendance, roistering, benefits), Customer relationship management (Sales and marketing, commissions, service, customer contact and call center support), Data services (various "self-service" interfaces for customers, suppliers, and/or employees) and Access control (management of user privileges for various processes).

### 1.1.5 System environment or special conditions

SBA is design in ADempiere which is developed 100% in Java and currently supports Oracle 10g2 Enterprise and XE as well as PostgreSQL 8. Database independency is one of the highest priorities of the project. Adempiere server application is based in J2ee under Jboss. Adempiere

## 1.0 General Information

current client is a java application as well. The server side components as well as client access UI can be deployed on Linux as well as Windows Platform. The main client UI is AJAX enabled web based and is supported for all major web browsers.

ADempiere Active Data Dictionary (AD) and extensive online configuration capabilities make possible to deploy a "liquid software" paradigm where enterprises no longer have to adapt their business process to inflexible functionality of an ERP proprietary solution. To adapt the solution to required business processes is now possible for the first time in the history of ERP systems.

SBA require minimal additional hardware requirement, only as per the required usage patterns. Single Server is required for the deployment of ADempiere. User should learn simple ADempiere management concepts. The following list represents the Prerequisites for a successful installation:

- Sun Java JDK 6 Update 5 or later (SDK) – also known as Sun Java JDK (not just JRE)
- Database Oracle XE, Oracle 10gR2, Oracle 11g or EnterpriseDB Postgres Plus Advanced Server 8.3.
- Important: It is mandatory to use a Unicode character set.
- Database approved Linux Operating System, Windows 2003 or Windows XP
- Disk Space: > 5 GB (includes database)
- Swap Space: > 1GB
- Memory: > 512 MB - Recommended: > 1 GB
- TCP/IP connection
- Network setup with DNS server and a domain. Do not use IP addresses.
- Internet access with Firefox Browser 3.0 or IE 6 or above.

## 1.0 General Information

### 1.2 Project References

Following are the references that were used in preparation of this document:

- ITC-SMFA-EOBI-0002-20090222 Technical Proposal.doc
- Initial study - ITC EOBI SBA System Study Report v1.0.doc
- CompiereUserDoc32.pdf

## 1.0 General Information

### 1.3 Authorized Use Permission

SBA 1.0 by *ItCompletes*

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Publication Date: January, 2010

## 1.0 General Information

### 1.4 About this User Manual

#### 1.4.1 Intended Audience

This document is written for system administrators, configuration managers and all end users, who are responsible for setting up and maintaining SBA.

#### 1.4.2 Organization of the Manual

This manual is divided into the following sections:

- Table of Contents – List of all the contents in this user manual.
- General Information – Brief description of system in non technical terms.
- Authorized Use Permission – A copyright © notice.
- About *ItCompletes* – A brief history of ItCompletes, with a Tell Us What You Think section.
- Point Of Contact – Our help desk and contact information.
- System Summary – Provide system synopsis.
- Getting Started – Brief description for user to setup server/client setup.
- Using the System– Step by step description of how to use the application
- Work Flow– WF depiction with screen shorts
- Reports– How to create and use Reports

## 1.0 General Information

### 1.5 About ItCompletes

*ItCompletes* has been in business of software development for the last nine years. Its clientele comprises of essentially international customers from the United States, United Kingdom, UAE, and Egypt.

The mantra of the company is "Building quality into solutions". This, we believe, is highly dependent on people and processes. We try to employ the very selective set of people and have prepared processes that target quality from the start till the end. In the compromise between quality, time and price for every project, our natural tilt is towards quality.

#### 1.5.1 Tell Us What You Think

As the users of our products, you are the most important critic and commentator on our product line and its documentation. You can help us provide comprehensive and efficient products and documentation. We value your opinion and satisfaction with the software. We want to know what we're doing right, what we could do better, and any comments on how we can provide better service to you.

You can reach us via our website. If you have a technical question about this manual or our products you can email us. Your comments will help us understand our users' perspectives better.

#### 1.5.2 Points of Contact

##### *Information*

For informational and troubleshooting purposes please contact *ItCompletes* (Private) Limited.

##### ***ItCompletes* (Private) Limited**

 +92 (21) 468 0787  
 C-44, Block B, P.R.E.C.H.S,  
Karachi, Pakistan.

##### *Help Desk*

Itcompletes provides many levels and types of help and support functionality. Some is intended to help the user and other parts are intended to help the support person attempting to assist the user. For online help, user can visit our website

 <http://www.itcompletes.com>

## 1.0 General Information

For further support user can also email us

✉ [info@itcompletes.com](mailto:info@itcompletes.com)

Create an email to the support person. The email should contain the full information about the user's application/system environment and information about the task being performed when the query was created. This information provides the support person with the context of the user's action, which has caused the support request.

## 1.6 Acronyms and Abbreviations

AD	Active Data Dictionary
AJAX	Asynchronous JavaScript And XML
BPM	Business Process Management
BPV	Bank Payment Voucher
DB	Data Base
EE	Employee Employment
EI	Employee Information
EM	Employee Management
ER	Employee Relation
ERP	Enterprise Resource Planning
F&A	Finance & Accounts
GAD	General Administration Department
HOD	Head Of Department
HRM	Human Resource Management
IE	Internet Explorer
IT	Information Technology
JDK6	Java Development Kit 6
JRE	Java Runtime Environment
OMG	Object Management Group
PRT	Policy, Recruitment & Training
RDBMS	Relational Database Management System
SBA	Support Business Application
SDK	Software Development Kit
TCP/IP	Transmission Control Protocol/Internet Protocol
UI	User Interface
WF	Work Flow/ Workflow

## System Summary

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## 2 SYSTEM SUMMARY

SBA is intended to manage all the information and functions of business or company from shared data stores. Our system typically has modular hardware and software units and "services" that communicate on a local area network. The modular design allows a business to add or reconfigure modules while preserving data integrity in one shared database that may be centralized or distributed.

It is a client server based application. For secure connection, every user login to the system with a unique user name and password. After logging in the Main Menu will appear which will show all the Modules and Sub Modules in a "tree like" structure. Main Menu is the actual navigation form, from where user can open any desired screen. User can also search any menu item using the Lookup at the boot on this Main Menu. The Header in Main Menu lists the current window, the current user, the Client, the Organization and the database.

Every Module is further categorized in Sub Modules and/or Setup Modules. Setup Modules contain Setup Forms which are mandatory as all other forms require information from these Setup Forms.

Sub Modules contain different forms. Every Form is design in a "tab like" structure; it is use for data entry purpose. In most of the cases first or main tab contain mandatory data and user cannot enter data in other tabs until or unless compulsory information in first tab is saved. Tab names in italic font define that this tab only displays data in read only mode. Fields are the most essential part of every form, which are use to enter data in database. Each field is color coded Grey mean read only fields, White mean normal fields, Light blue mean mandatory fields (with some data) and Pink/Red mean mandatory fields. Users have the option to add a new record, edit previous record, delete an existing record, delete multiple records, navigate from one record to another, navigate from one tab to other, save current action and undo current action. User can also attach required documents, forward workflow to desire location and writer his/her notes (the notes history will be available at every point).

## 2.0 System Summary

### 2.1 System Configuration

In addition to SBA software, you will need three additional (and easy to acquire) software components:

- Operating System software that supports Java such as Microsoft Windows
- Java Development Kit 6 (JDK6) <http://java.com/en/download/index.jsp>
- Database software from either Oracle or EnterpriseDB.

The Oracle Database (commonly referred to as Oracle RDBMS or simply Oracle) is a relational database management system (RDBMS) produced and marketed by Oracle Corporation. As of 2009, Oracle remains a major presence in database computing.

Oracle Database	
<b>Developer(s)</b>	Oracle Corporation
<b>Stable release</b>	11g R2 / 2009-09-01; 3 months ago
<b>Written in</b>	C
<b>Operating system</b>	Cross-platform
<b>Available in</b>	Multiple
<b>Type</b>	RDBMS
<b>License</b>	Proprietary
<b>Website</b>	<a href="http://www.oracle.com/">http://www.oracle.com/</a>

EnterpriseDB™	
<b>Website</b>	<a href="http://enterprisedb.com">enterprisedb.com</a>
<b>Category</b>	Enterprise
<b>Phone</b>	(732) 331-1300
<b>Email</b>	<a href="mailto:info@enterprisedb.com">info@enterprisedb.com</a>
<b>Description</b>	Relational Database Management System

EnterpriseDB develops and supports EnterpriseDB Advanced Server, an Oracle-compatible relational database management system (RDBMS). EnterpriseDB Advanced Server runs most applications written for Oracle - unchanged and at a small fraction of Oracle's cost. It is built on PostgreSQL and designed for high-volume, mission-critical enterprise use.

Download and install Sun Java JDK 6 (SDK) - also known as Sun Java JDK, Update 5, or a later version of Java1.6.Server requires the SDK (not just JRE.)

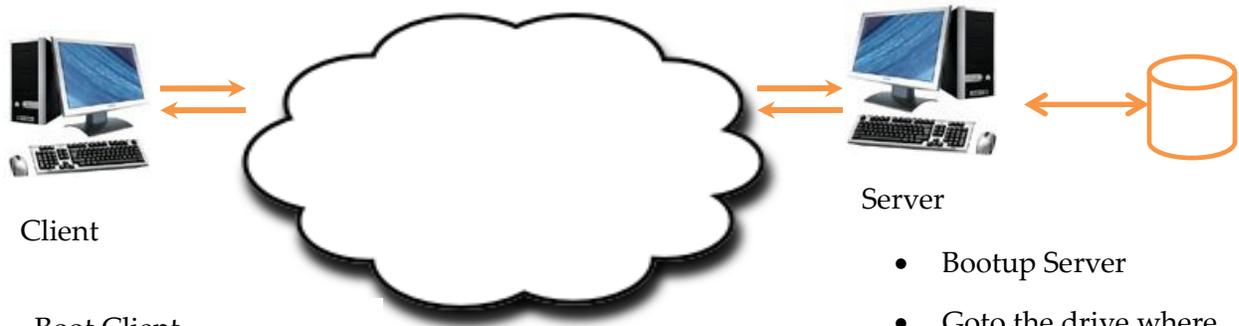


The computer hardware requirements for SBA installation are modest. For evaluating SBA, a modern desktop or laptop computer will likely have the needed processing power, memory, and storage and network resources. For demanding production SBA deployments, user will want one or more server-class computers and potentially a storage array.

SBA includes (almost) all segments of business using ordinary Internet browsers as thin clients. It has minimal additional hardware requirement: Single Server is required for the deployment, System must also have Disk Space: > 5 GB (includes database), Swap Space: > 1GB, Memory: > 512 MB (Recommended: > 1 GB).

Specifications		Processor	
<b>Hewlett-Packard</b>		<b>Intel(R) Pentium(R) 4 CPU 2.40GHz</b>	
System Model:	DSDT	Version:	x86 Family 15 Model 3 Stepping 3
BIOS Version:	Hewlett-Packard 786B2 v1.11	Speed:	2394 MHz
Operating System		Local Disk	
<b>Microsoft Windows XP Professional</b>		<b>Total Capacity: 74.52 GB</b>	
Version:	5.1.2600	Sum of Hard Disks: (C: D: E: F: )	
Service Pack:	3.0	<input type="checkbox"/> Used: 23.63 GB <input type="checkbox"/> Free: 50.89 GB	
Location:	C:\WINDOWS	Memory (RAM)	
PID:	76487-640-5536995-23765	Capacity:	1 GB
Hot Fix:	XpsEP5C		

## 2.2 Data Flow



- Boot Client

- Goto URL:

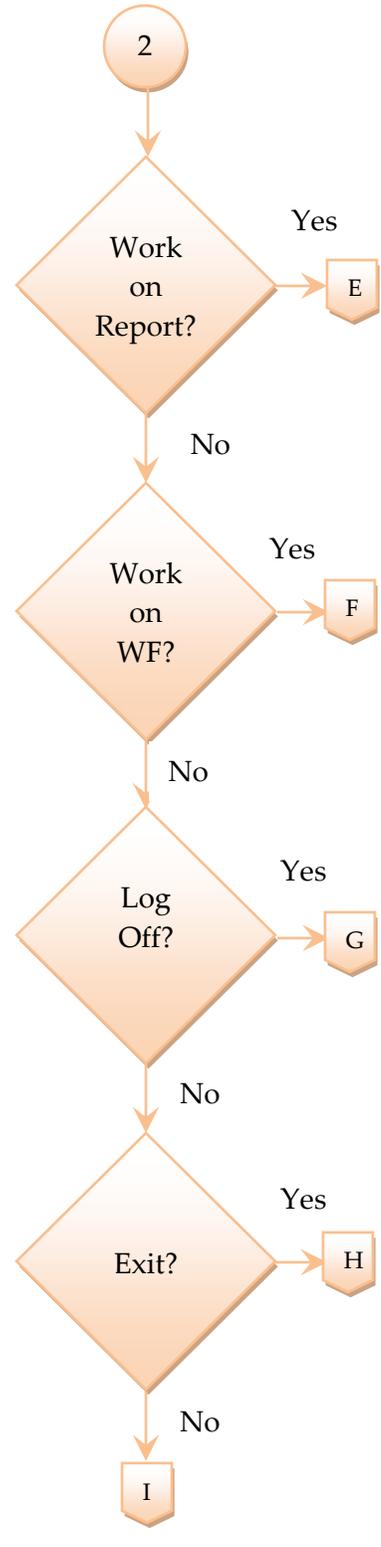
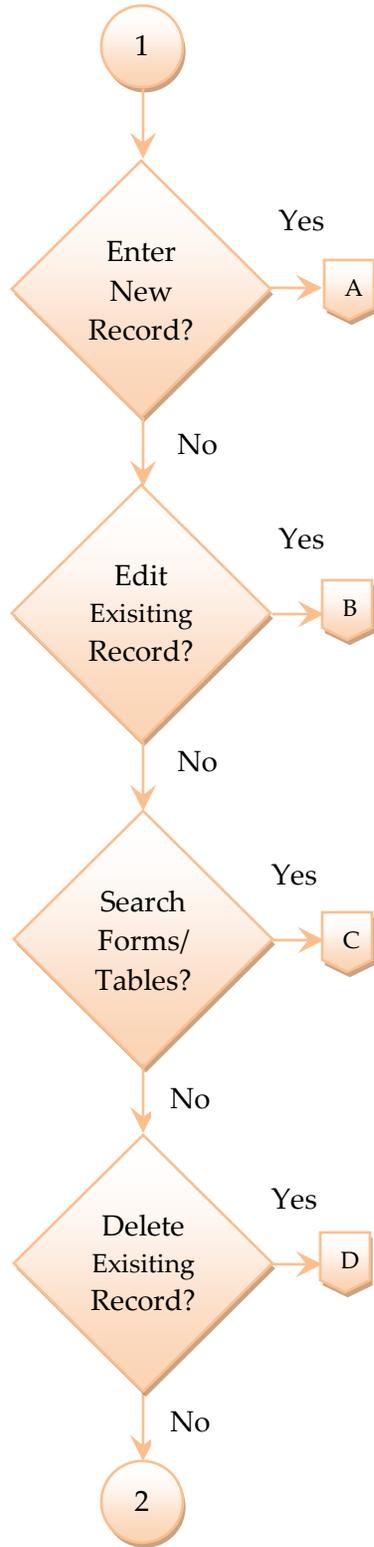
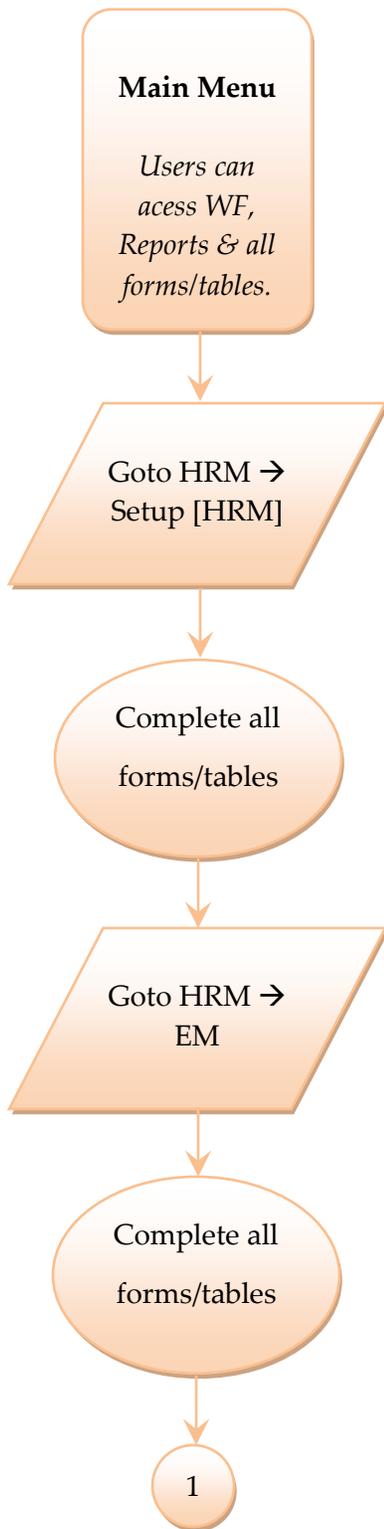
<http://ADServer/admin>

- Click on “ Web Start”
- Install Application
- Login with User ID,  
Password and Role
- Main Menu Appear

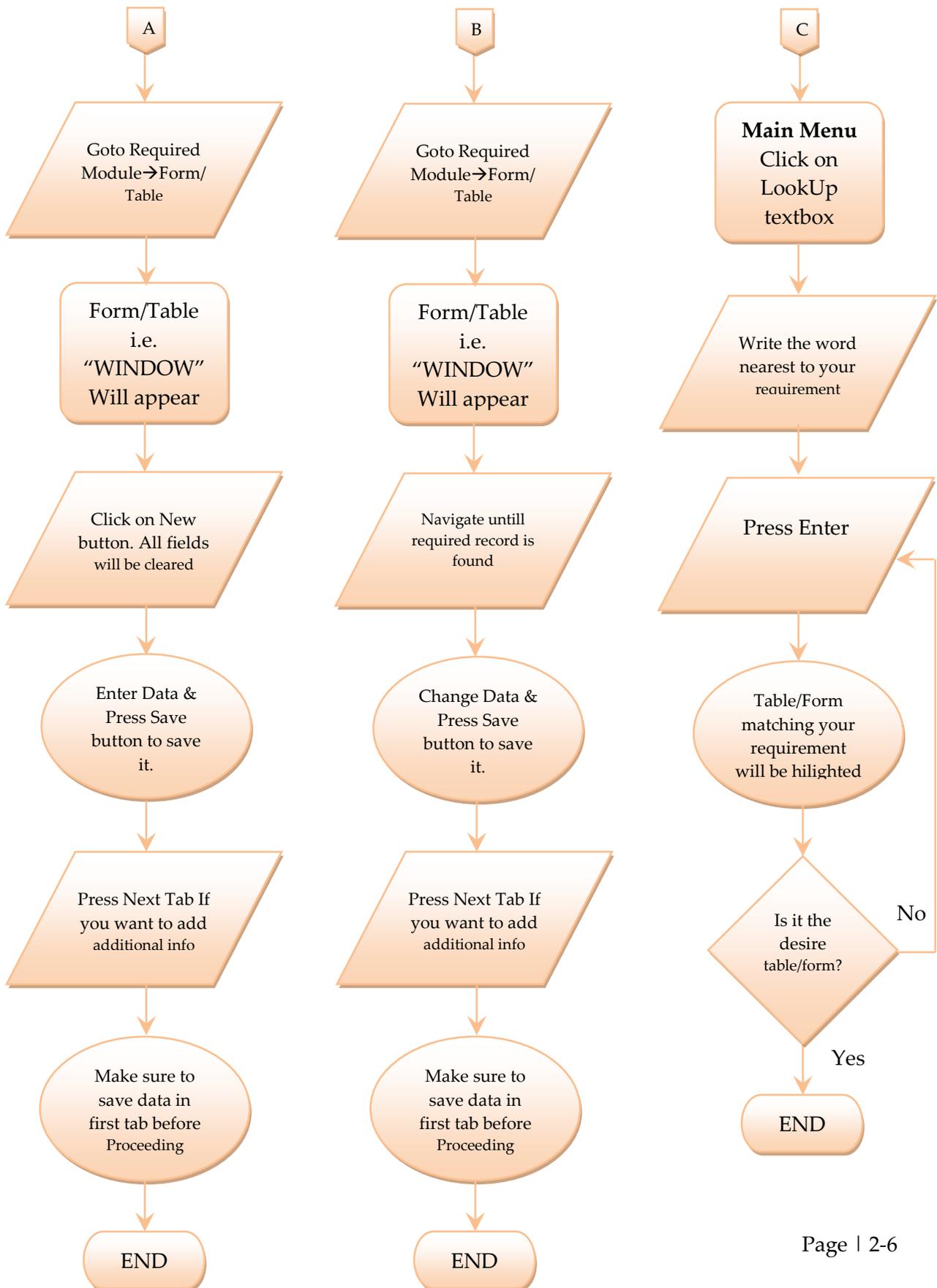
Server

- Bootup Server
- Goto the drive where  
ADempiere is install let it be C  
drive so goto  
C:\ ADempiere \utils
- RUN Server.bat

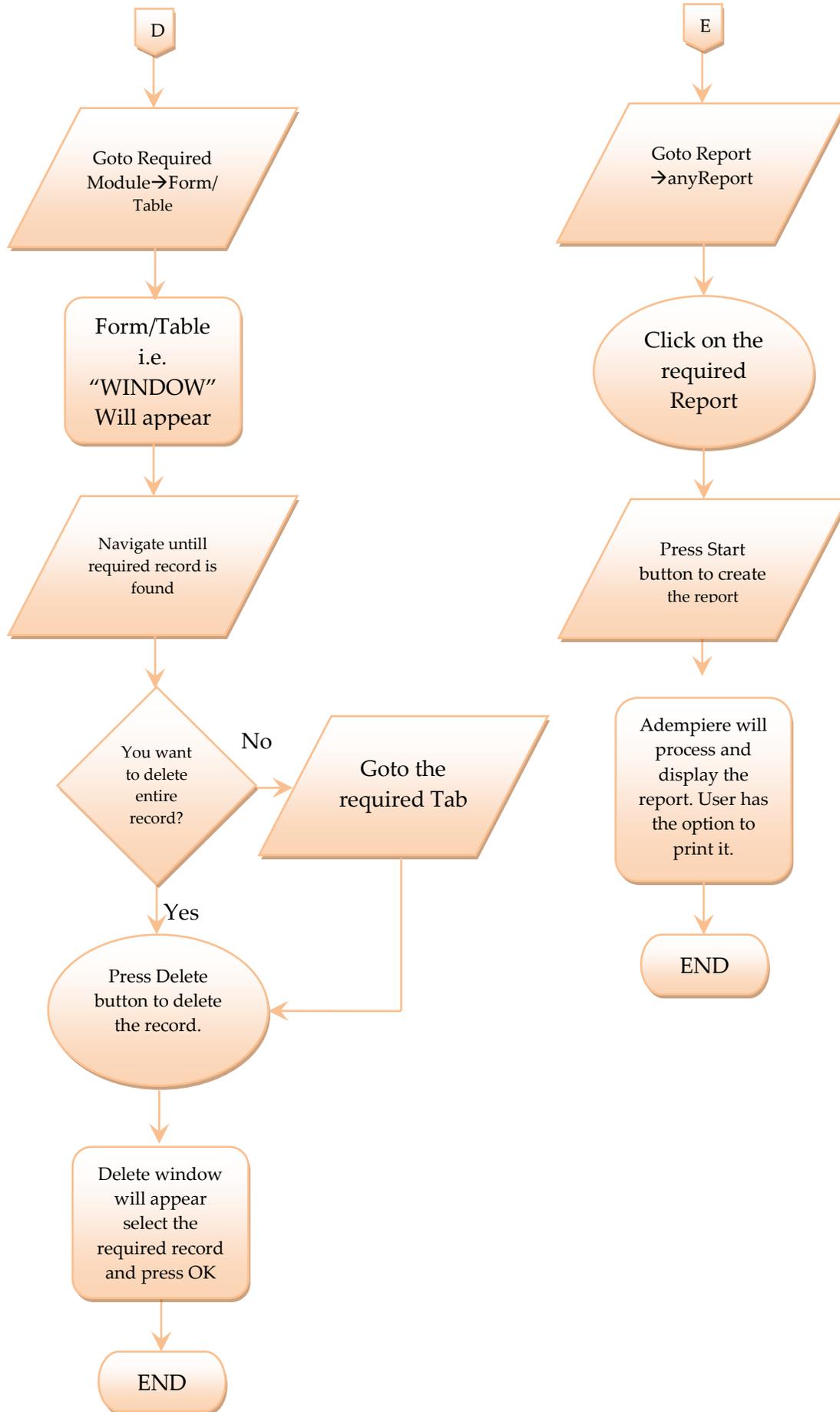
*Follow the steps define in DFD*



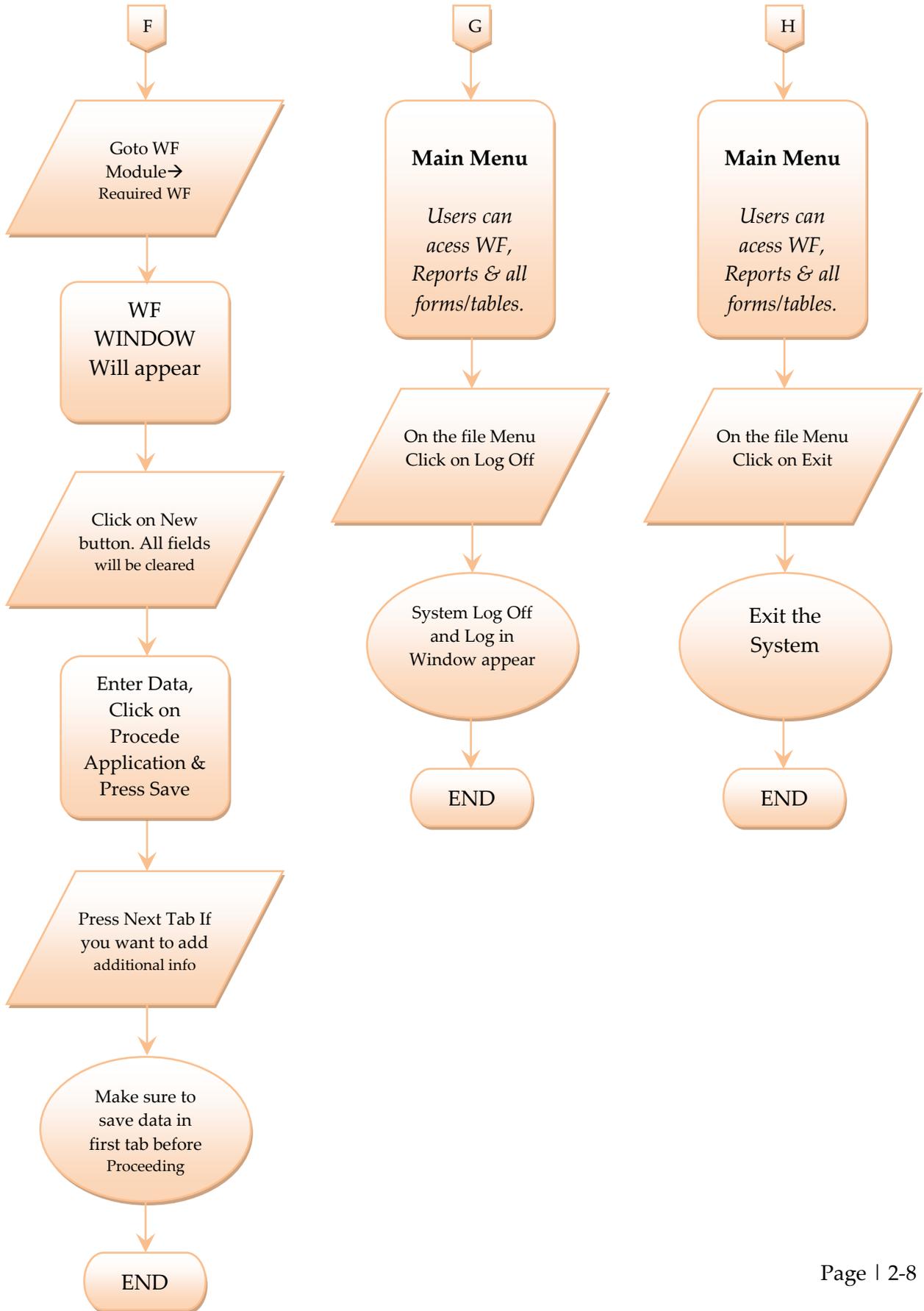
## 2.0 System Summary



2.0 System Summary



2.0 System Summary



## 2.0 System Summary

### 2.3 User Access Levels

SBA provide secure connection, every user must be authorize to login to the system with a unique user name and password. Different users and/or user groups login to the system as per their requirement. There are certain restrictions placed on system accessibility or use for each user for example F&A HOD will have more privileges then F&A Payroll employee to access the system. For reference we provide user name and password of different users and/or groups

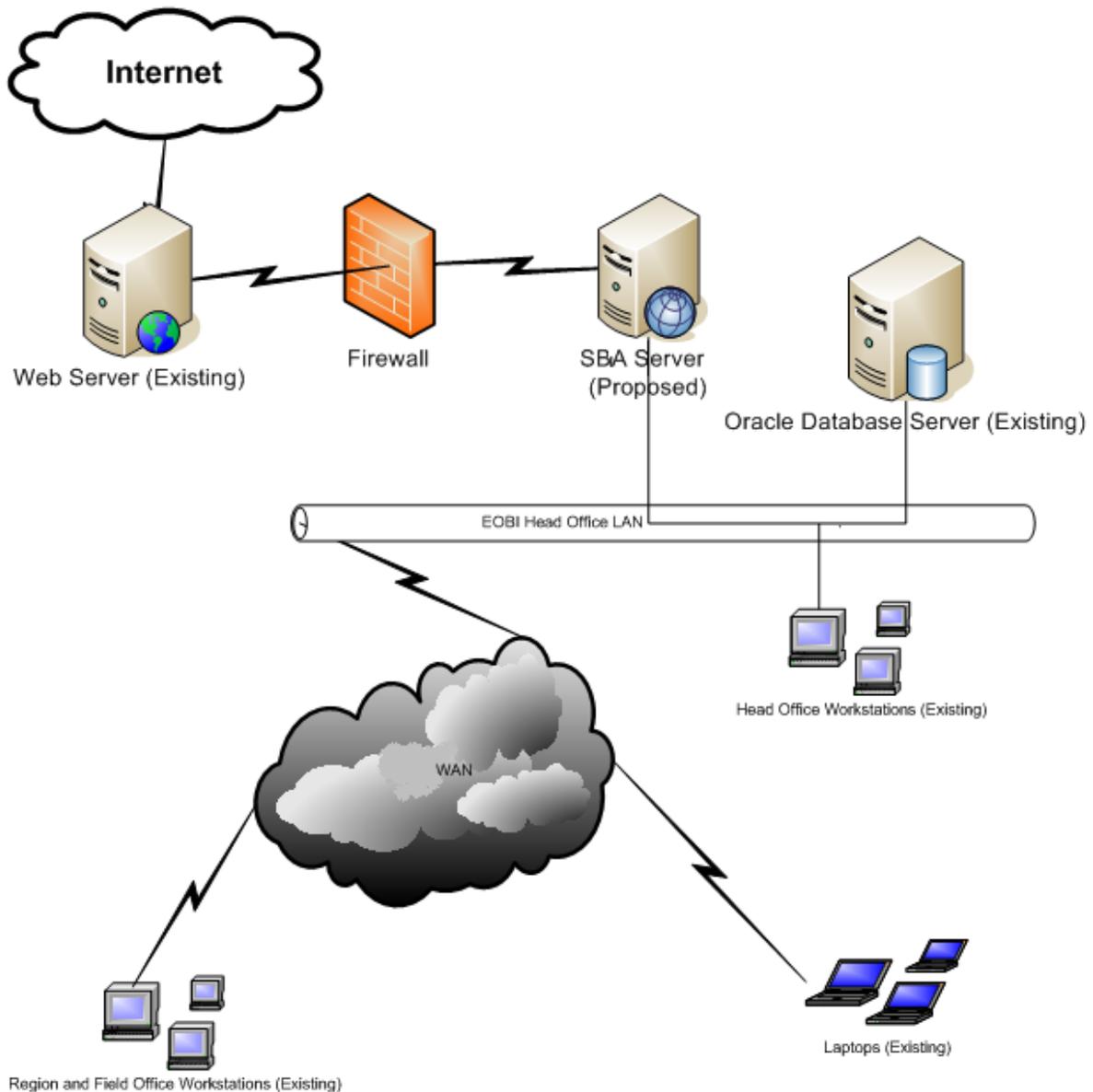
Users and Groups	User Name And Password	
Competent Authority	ID:CompetentAuthority Pass : CompetentAuthority	
F&A HOD	ID: FinanceHOD Pass : FinanceHOD	
F&A ABR	ID: FinanceABR Pass : FinanceABR	
F&A Loan & PF	ID: FinanceLPF Pass : FinanceLPF	
F&A Payroll	ID: FinancePayroll Pass : FinancePayroll	
F&A Banking	ID: FinanceBanking Pass : FinanceBanking	
F&A Pension	ID: FinancePension Pass : FinancePension	
F&A Imprest	ID: FinanceImprest Pass : FinanceImprest	
F&A Disbursement	ID: FinanceDisbursement Pass : FinanceDisbursement	
GAD Loan	ID: GADLoan Pass : GADLoan	
GAD General Services	ID: GADGeneralServices Pass : GADGeneralServices	
GAD Medical	ID: GADMedical Pass : GADMedical	
HR ER	ID: HRER Pass : HRER	
HR PRT	ID: HRPRT Pass : HRPRT	
Audit	ID: Audit Pass : Audit	
IT	ID: IT Pass : IT	
Law	ID: LAW Pass : LAW	
Board Secretariat	ID: BoardSecretariat Pass : BoardSecretariat	
Regional Office	ID: ReginalOffice Pass : ReginalOffice	
Employee	ID: EOBIEmployee Pass : EOBIEmployee	ID: EmployeeSupervisor Pass : EmployeeSupervisor

## Getting Started

---

### 3 GETTING STARTED

This section provides a general walkthrough of the system from initiation through exit. The logical arrangement of the information shall enable the functional personnel to understand the sequence and flow of the system. Screen prints have been used to depict examples of text under each heading. The figure shows the basic working of the system:



## 3.0 Getting Started

### 3.1 Logging On

For secure connection, every user login to the system with a unique user name and password. Open the browser and type in the URL: <http://ADServer/admin> change ADServer with server name or server IP address now click on 'Web Start'. Follow the instructions on screen.

First application will download and then it will be verified by the server.

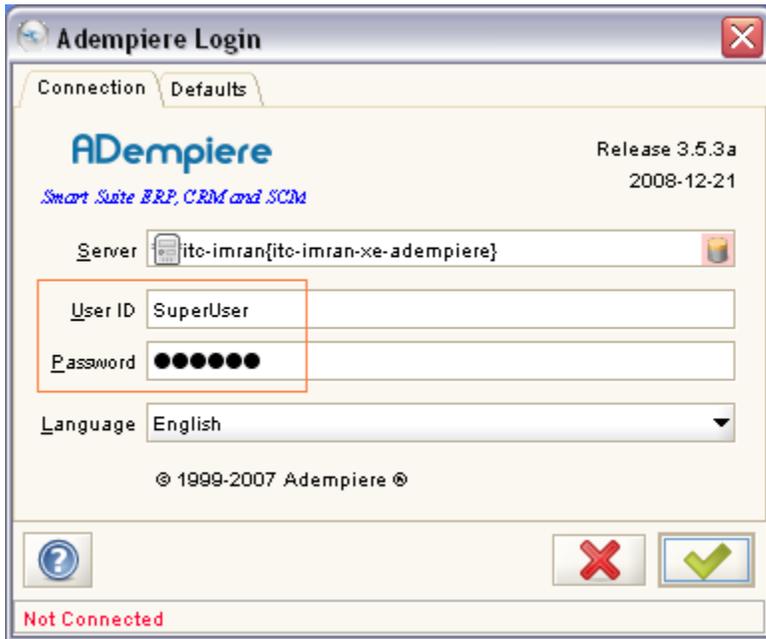


After downloading and verification the following splash screen will appear

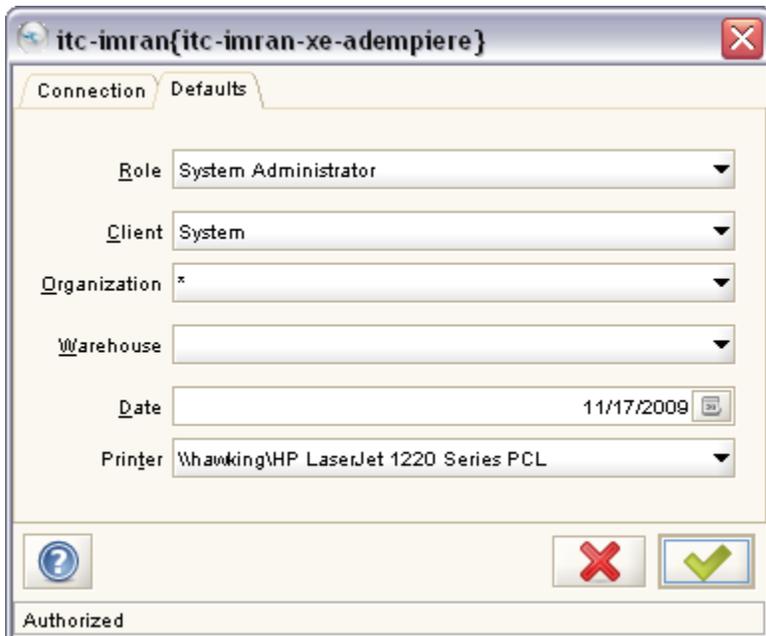


### 3.0 Getting Started

User ID: SuperUser; Password: System



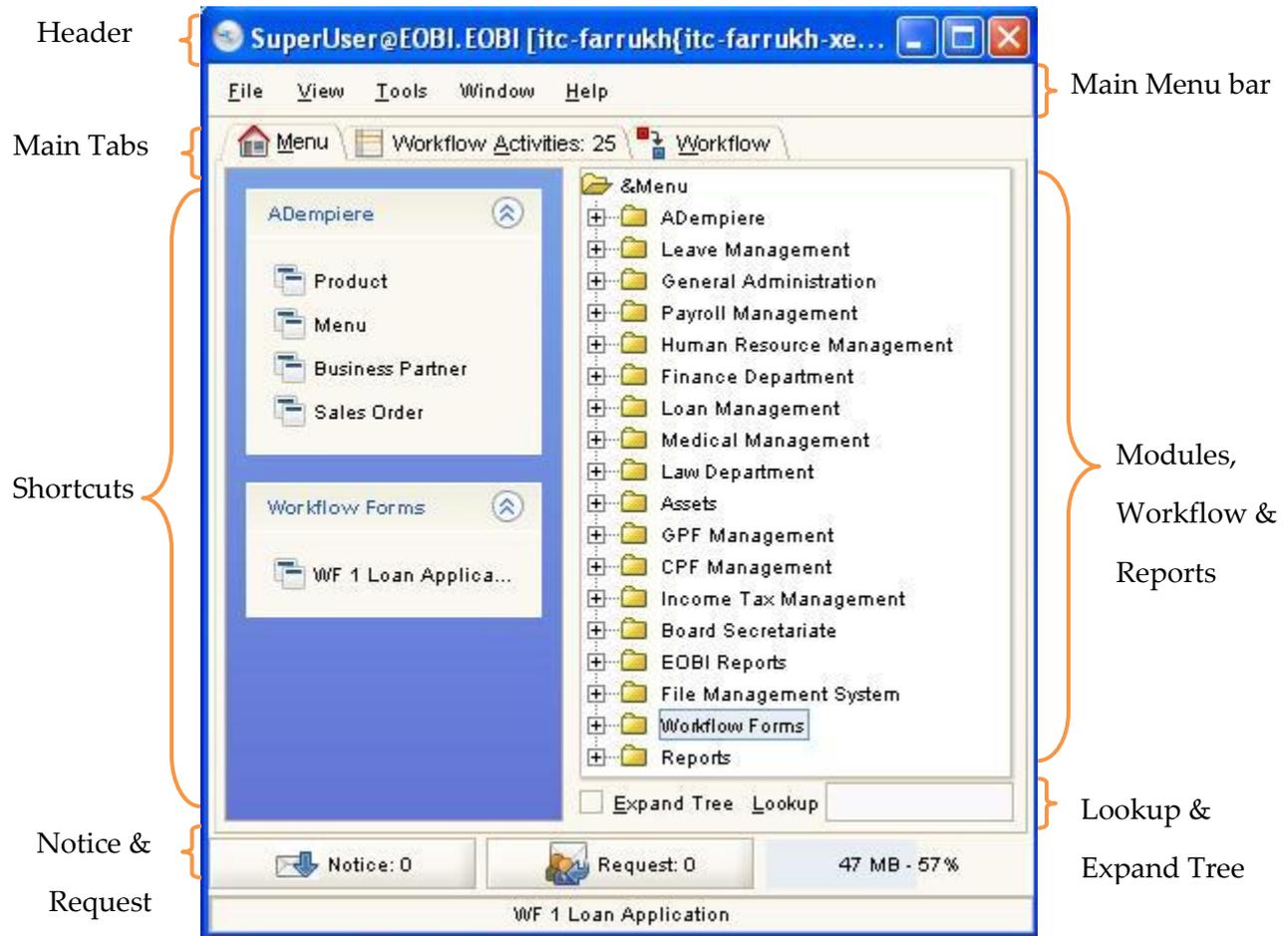
As shown in figure the server name will be selected by default. When user will click on  button “Defaults screen” will appear and user can select the required values. Select role as “System Administrator” in “Default screen” as depicted in the image. Or user can use his/her actual Role, if any.



### 3.2 Main Window - The Application Window

This section describes the system menu first encountered by the user, as well as the navigation paths to functions noted on the screen. After login a main menu will appear as shown in image.

Main Menu is the actual navigation from where we can open any desired Screen.



The main application window is divided into:

- Header
- Main Menu bar
- Main Tabs
- Modules & Sub Modules
- Shortcuts
- Lookup & Expand Tree
- Notice & Request

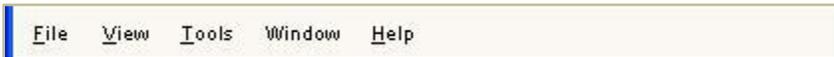
## 3.0 Getting Started

### 3.2.1 Header



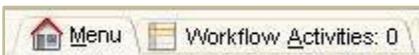
The Header lists the current window, the current user, the Client, the Organization and the database.

### 3.2.2 Main Menu bar



The Main Menu bar contains simple access to different options. It is categorized in File, View, Tools, Window and Help options. Through File option user can logoff, exit and take screen shorts of current window. The Tools option provide different cogs like calculator, editor (it is a simple note pad), calender etc. User can also view WF activities using Tools option. If there are many tables/forms open then with the help of Window option user can see or close all windows using Show all windows & Close all windows. User can get online help and support directly using “Help” option. A quick overview of the system can also be seen using “About” option in the help menu.

### 3.2.3 Main Tabs



These “Main Tabs” are use to switch users’ view. If user wants to see the WF activities s/he clicks on Workflow Activities Tab. Through Menu Tab user can access all Modules, Sub Modules, WF and Reports.

### 3.2.4 Modules

Following are modules the Main Modules:

- Leave Management
- General Administration
- Payroll Management
- Human Resource Management

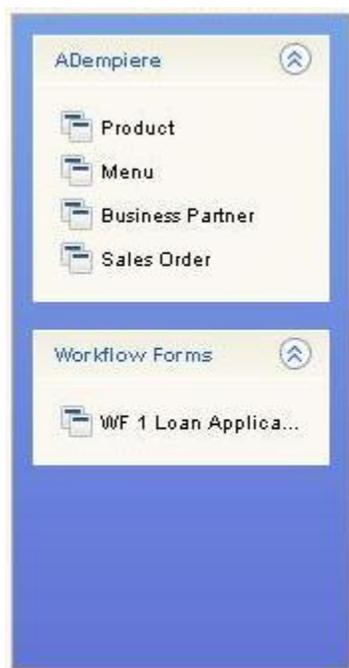
### 3.0 Getting Started

- Finance Department
- Loan Management
- Medical Management
- Law Department
- GPF Management
- CPF Management
- Income Tax Management
- Board Secretariat
- File Management System

In addition the application also has following divisions:

- Work Flow
- Reports

#### 3.2.5 Shortcuts



Shortcuts provide a quick access to any module, sub modules, workflow, reports and forms/tables. To add a shortcut just right click on the particular entity and click “Add to bar” a shortcut of that particular unit will be created.

### 3.0 Getting Started

#### 3.2.6 Lookup & Expand Tree



User can search records, data, and required module/sub module in any menu item using the Lookup at the boot on this main screen. Lookup option is also present in the WINDOW toolbar. When User click on “Expand Tree” option all the Main Menu expands and all the Sub Menus can be seen.

#### 3.2.7 The WINDOW View Options

Every table/form a.k.a WINDOW has two view options grid view and form view. These views can be toggle using a button on WINDOW toolbar which is shown in the figure below:



Grid View:

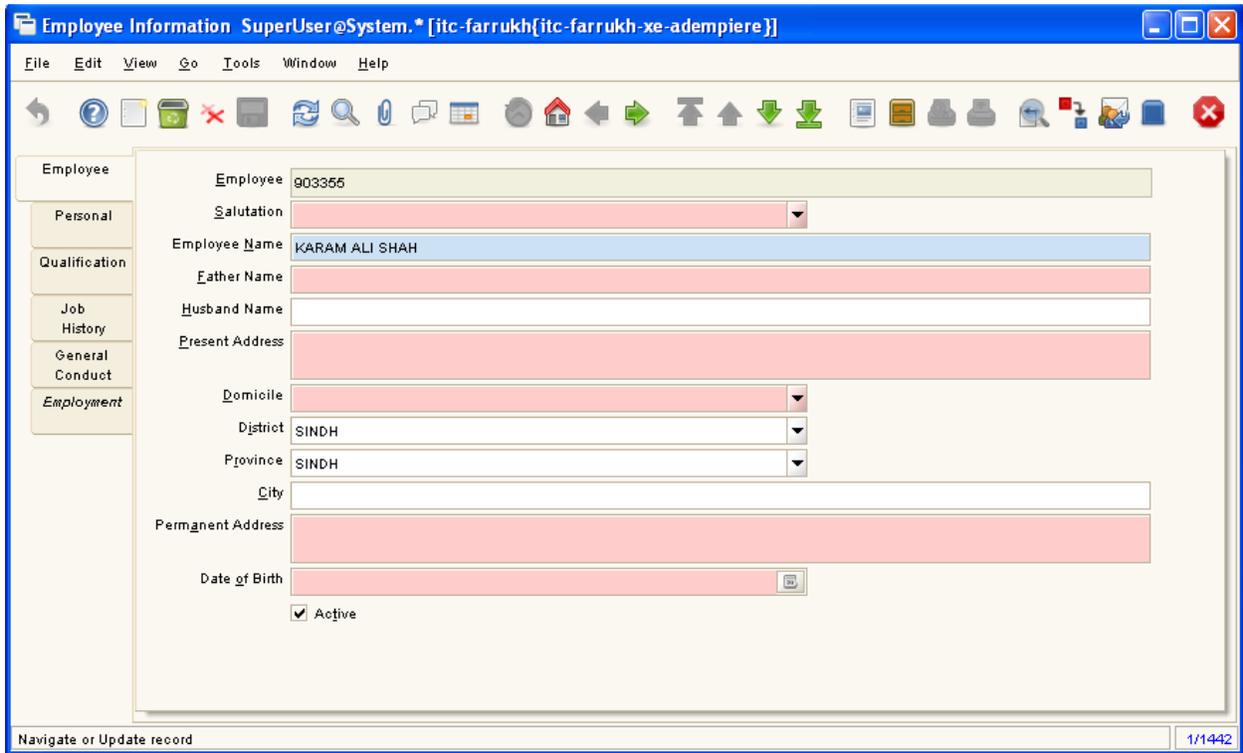
The screenshot shows a window titled 'Employee Information SuperUser@System.\* [itc-farrukh[itc-farrukh-xe-adempiere]]'. The window contains a menu bar (File, Edit, View, Go, Tools, Window, Help) and a toolbar with various icons. Below the toolbar is a grid table with the following data:

Employee	Employee	Salutation	Employee Name	Father Name	Husband Name	Present Address	Domicile	District	Province	City	Per
	903355		KARAM ALI SHAH					SINDH	SINDH		
Personal	903515		MOHD RASHID AHMED					SINDH	SINDH		
	910270		NASIMA HASSAN ALI					SINDH	SINDH		
Qualification	918412		SHAKIL AHMED					SINDH	SINDH		
	918423		ZAREEN KHOKHAR					SINDH	SINDH		
Job History	919733		MUHAMMAD NAEEM KHAN					SINDH	SINDH		
	921211		ASHFAQ ALAM					SINDH	SINDH		
General Conduct	923488		MUHAMMAD AMIR JAVED					SINDH	SINDH		
Employment	923499		MR.SIDDIQ AHMED					SINDH	SINDH		
	923502		IMRAN MOHSIN					SINDH	SINDH		
	900107		S AKHLAQ AHMAD					SINDH	SINDH		
	900754		F K CUTLERYWALA					SINDH	SINDH		
	901075		NASREEN SULTANA					SINDH	SINDH		
	901531		MASOOD IQBAL FAROOQI					SINDH	SINDH		
	910350		ALAN PATRICK DIAS					SINDH	SINDH		
	913188		SIRAJ AHMED SIDDIQUI					SINDH	SINDH		
	917248		SHER ALI JATOI					SINDH	SINDH		
	922714		SHAHID KAMAL					SINDH	SINDH		
	922725		SHEHZAD KAMRAN					SINDH	SINDH		
	922747		ENAIT UR REHMAN					SINDH	SINDH		
	922750		MOHD SHAFIQ					SINDH	SINDH		

At the bottom of the window, there is a status bar that says 'Navigate or Update record' and a page indicator '1/1442'.

### 3.0 Getting Started

Form View:



#### 3.2.8 Buttons on the WINDOW toolbar

A 'window' is a screen for data entry. When you open a window, by clicking on any item on main menu, you will get a screen having following buttons at the top. Below image is a simplified version of full toolbar.



Try to press the NEW record (3rd from left). You will notice that the toolbar will toggle few button and convert to following image.

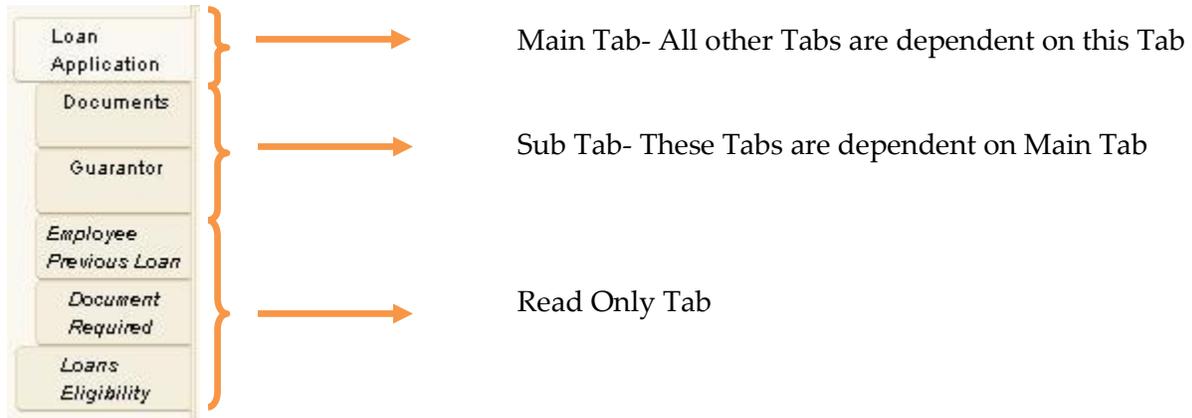


The first button on the above toolbar is CANCEL button that will appear and the 6th button is for SAVE the record. Last button is to refresh the data, 3rd is to delete a single record and 4th is to delete multiple records in one go

### 3.0 Getting Started

#### 3.2.9 The Tab(s) on the WINDOW

Tabs display data which contain dependencies. For example, you must define Employee before you can define his Persona or Qualification information. By clicking on the desired tab, you change to the targeted information. Tab names in italic font define that this tab only displays data in read only mode.



#### 3.2.10 Fields Color Schema

Fields are color coded as follows:

- Grey – read only
- White – normal fields
- Light blue – mandatory fields (with some data)
- Pink/Red – mandatory fields

Personal Number	916530
Salutation	
Employee Name	ALLAH BUX BALOCH
Father / Husband Name	
Husband Name	

### 3.0 Getting Started

#### 3.3 Changing User ID, Password & Role

Changing User ID, Password and Role is a security matter therefore this option is not available to all users of the application. This option is only accessible by IT head or administrator. Any user with administrative role/privillages can change and/or set user id, password and/or role of any/new user/s.

Follow this path to open user window:

“Adempiere module → Security (Sub Module) → User (form/table) WINDOW”

Make desire changes and press ok.

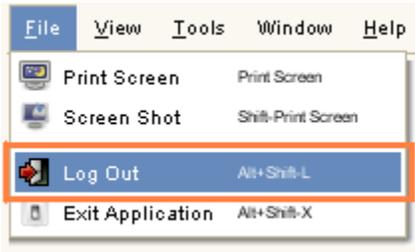
The screenshot shows a web-based user management interface. The main form is for editing a user named 'SuperUser'. Key fields include:

- Client:** System
- Organization:** (empty)
- Name:** SuperUser
- Password:** (masked with dots)
- Email Address:** (empty)
- Search Key:** superusr
- Description:** Super User with Access to all levels
- Extra Informations:**
  - Active
  - Business Partner:** (empty)
  - Title:** (empty)
  - UserPIN:** (empty)
  - Phone:** (empty)
  - Fax:** (empty)
  - Facsimile number:** (empty)
  - Partner Location:** (empty)
  - Birthday:** (empty)
  - 2nd Phone:** (empty)
  - Notification Type:** Email
  - Full BP Access
- Internal:**
  - Email User ID:** (empty)
  - Supervisor:** (empty)
  - Trx Organization:** (empty)
  - Email User Password:** (empty)
  - LDAP User Name:** (empty)
  - Connection Profile:** (empty)
- External:**
  - Greeting:** (empty)
  - Last Contact:** (empty)
  - Last Result:** (empty)
  - Email Verify:** (empty)
  - Verification Info:** (empty)
  - Is In Payroll

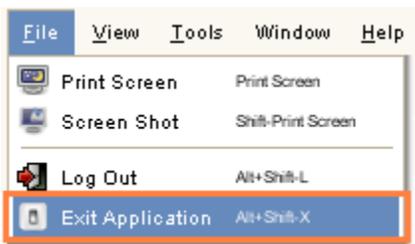
### 3.0 Getting Started

#### 3.4 Exit Application & Log Out

Exit and Log Out options are present in the File Menu of Main Menu Bar. To Log Off just click on File → Log Out as shown below



Current user will be log out and the Log In window will appear. To Exit the system click on just File → Exit Application as shown below



User can also Exit using cross “X” button on the top right corner.



## using the System

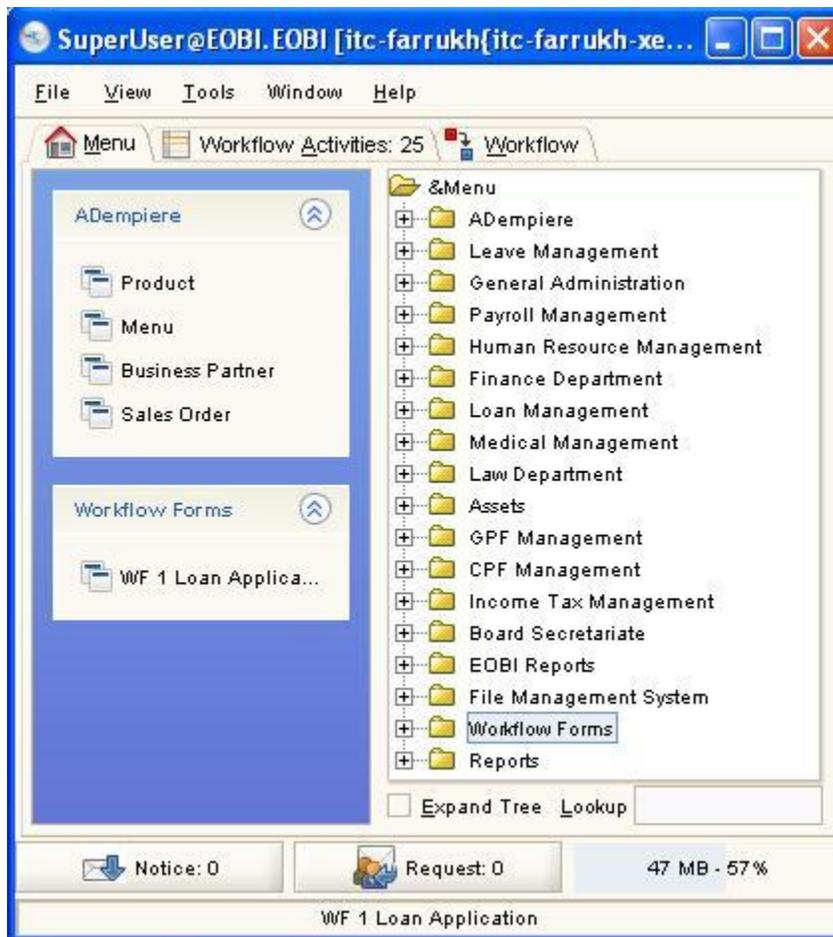
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## 4.0 Using the System

### 4 USING THE SYSTEM

This section provides a detailed description of the system from initiation through exit, explaining in detail the characteristics of the required input and system-produced output. Each module and sub module is under a separate section header.

After user login to the system s/he can access all the modules, sub modules, workflows and reports using the “Main Screen”. When user first accesses the system s/he should complete “Setup (HRM)” and “Employee Management” modules which are actually sub modules of “Human Resource Managemnet”. These modules are the basic tables/forms all other tables/forms, WF & Reports are directly or indirectly dependend on them.



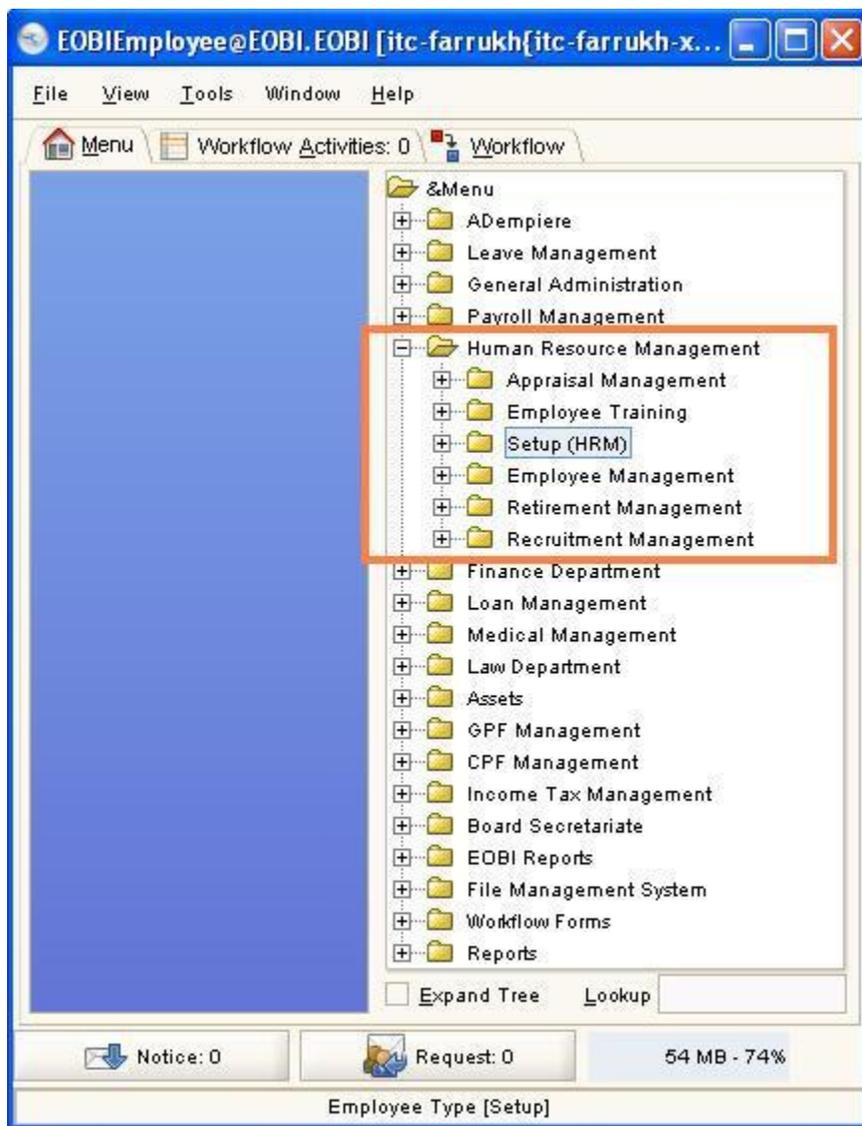
## 4.0 Using the System

The main operation of the system is to add, delete, search, edit and navigate records in the table/form. WF and Reports are discussed in section 5 and section 6.

We will discuss an example that how a user can add, delete, search, navigate and edit records from Employee Information form/table. All other forms/tables work in the same pattern.

### 4.1 Working On Forms/Tables

We'll take HRM as an example because it is the main module this module contains six sub modules. When user clicks on HRM tree it expands and all sub modules in HRM appears. To access sub modules user have to click on the required module.



## 4.0 Using the System

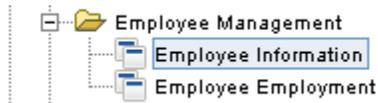
HRM have following Sub Modules:

- Appraisal Management
- Employee Training
- Setup [HRM]
- Employee Management
- Retirement Management
- Recruitment Management.

The basic sub module is “Setup [HRM]”. User must first complete all the tables/forms in this module because it contain all mandatory fields and data for other tables/forms. The second step is to complete tables/forms in “Employee Management” sub modules as all other modules are dependent on its data.

### 4.1.1 HRM → Employee Management → Employee Information

After completing all the tables in “Setup [HRM]” user can start working in EM. As an example we’ll work on Employee Information form/table all other tables/forms work in the same pattern. In Employee Management Click on Employee Information.



A Lookup Record screen will be loaded. It gives user the option to search for a particular record or load the main form to view, add, delete and edit etc records. Using the Lookup Record screen user can either enter employee’s id or name to search for a particular record and if user don’t want to search s/he can just click on  button to goto the Employee Information form/table. If user clicks on  button then Employee Information form/table will not be loaded.



Ok Button: If user has entered Employee ID and/or Employee Name load Employee Information table/form and display resultant record. If both fields are blank then load Employee Information table/form and display all records.



Cancel Button: End process goto Main Screen



New Button: Load Employee Information table/form with all blank fields to enter new record.

### *Add New Records:*

There are two methods to add a new record. Either click on the new button on the Lookup Record window or if you've click on Ok Button then click on New Button in the Employee Information form/table.



In either case the following window will appear

## 4.0 Using the System

Employee Information EmployeeSupervisor@EOBI.EOBI [itc-farrukh[itc-farrukh-xe-adempiere]]

File Edit View Go Tools Window Help

Employee

Personal

Qualification

Job History

General Conduct

Employment

Employee

Salutation

Employee Name

Father Name

Husband Name

Present Address

Domicile

District

Province

City

Permanent Address

Date of Birth

Active

Inserted [+\*/1/1]

Enter all the required information. Remember that Pink Fields are mandatory fields and record will not be saved until or unless these fields are filled.



Press save button when you are done. If you want to enter additional information use the sub tabs, remember to press save button before going to the sub tabs because these tabs are dependent on Main tab.

Employee

Personal

Qualification

Job History

General Conduct

Employment

## 4.0 Using the System

When user enter information into fields mandatory fields color changes to blue

After pressing save button Employee ID field will be disabled it means that this field cannot be edited

User can make changes and save again if s/he wants.

## 4.0 Using the System

### View All Records:

To view all records do not enter any data in the Lookup Records window and press Ok Button. Employee Management form/table will be loaded with all records.

Employee	Employee	Salutation	Employee Name	Father Name	Husband Name	Present Address	Domicile	District	Province	City	Per
	903355		KARAM ALI SHAH					SINDH	SINDH		
Personal	903515		MOHD RASHID AHMED					SINDH	SINDH		
	910270		NASIMA HASSAN ALI					SINDH	SINDH		
Qualification	918412		SHAKIL AHMED					SINDH	SINDH		
	918423		ZAREEN KHOKHAR					SINDH	SINDH		
Job History	919733		MUHAMMAD NAEEM KHAN					SINDH	SINDH		
	921211		ASHFAQ ALAM					SINDH	SINDH		
General Conduct	923488		MUHAMMAD AMIR JAVED					SINDH	SINDH		
Employment	923499		MR.SIDDIQ AHMED					SINDH	SINDH		
	923502		IMRAN MOHSIN					SINDH	SINDH		
	900107		S AKHLAQ AHMAD					SINDH	SINDH		
	900754		F K CUTLERYWALA					SINDH	SINDH		
	901075		NASREEN SULTANA					SINDH	SINDH		
	901531		MASOOD IQBAL FAROOQI					SINDH	SINDH		
	910350		ALAN PATRICK DIAS					SINDH	SINDH		
	913188		SIRAJ AHMED SIDDIQUI					SINDH	SINDH		
	917248		SHER ALI JATOI					SINDH	SINDH		
	922714		SHAHID KAMAL					SINDH	SINDH		
	922725		SHEHZAD KAMRAN					SINDH	SINDH		
	922747		ENAIT UR REHMAN					SINDH	SINDH		
	922758		YOUSUF SHARIF					SINDH	SINDH		

Data requested: 1/1443

### Navigate through Records:

To navigate from one record to other use the UP/DOWN arrow keys.



These keys are very useful when user is viewing the record in form view.

 Move to the Last Record.

 Move one step Down.

 Move one step Up.

 Move to the First Record.

## 4.0 Using the System

### Search Records:

There are two methods to search the records both are through Lookup Records window. User can search records when first time Lookup Record window is loaded and s/he can search record when s/he is on the Employee Management form/table. Click on the Lookup Record button



Lookup Record window will be loaded. Enter desire ID and/or Name

Press Ok button to start processing



The required result will be loaded in the Employee Management form/table

Employee	Gender	Marital Status	Blood Group	Cell Number	Telephone Number	Email Address	New NIC
123	Male	Married			123123121		122312312321321

## 4.0 Using the System

### Navigate through Tabs:

To navigate from one Tab to other use the RIGHT/LEFT arrow keys.



When user is on the first Tab, the left arrow is disabled. It is enabled as soon as user goes to the next tab.



The process is from left to right. Left means on first tab right me Next tab and so on.

### Edit Records:

To edit the record first search for the required record and then make the necessary changes.

Employee	123
Salutation	Mr.
Employee Name	Gulzar
Father Name	Ahmed

Notice that employee ID field is disable it means that user can not make any changes in ID once it is assigned. Make required changes and press Save

Employee	123
Salutation	Mr.
Employee Name	Gulzar Ahmed
Father Name	Ahmed

Changes are saved in the DB

Employee	Salutation	Employee Name	Father Name	Husband Name
123	Mr.	Gulzar Ahmed	Ahmed	

### Delete Records:

To delete first search for the desire record using Lookup Records or navigate through records. Then select the required record and delete it.

## 4.0 Using the System

There are two methods to delete a record



**Delete Selected Item:** Select the required record and then press this button. The selected record will be deleted. Make sure all the child information (i.e. dependent tab information) is deleted before deleting the Parent tab (i.e Main tab) record.

904109		DILAWAR SHAH					SINDH	SINDH	
910225		SYED IQBAL RAZA JAFRI					SINDH	SINDH	
FARIDA									
001	Mr.	abc	xyz		karachi	Sind	AZAD K...	SINDH	kara...
002	Mr.	a	a	a	aa	Sind	SINDH	SINDH	k k
123	Mr.	Gulzar Ahmed	Ahmed		123123123	Sind			

The following dialouge box will appear select the required record and press OK.

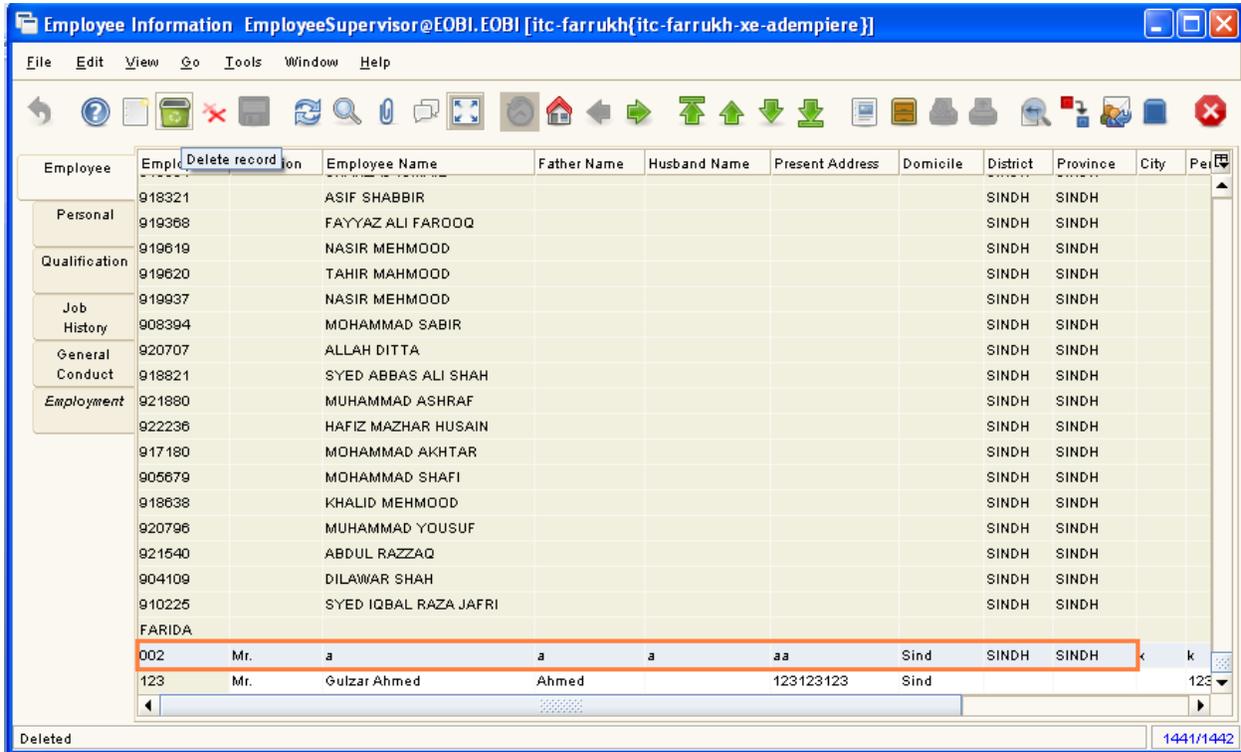
Record is deleted

904109		DILAWAR SHAH					SINDH	SINDH	
910225		SYED IQBAL RAZA JAFRI					SINDH	SINDH	
FARIDA									
002	Mr.	a	a	a	aa	Sind	SINDH	SINDH	
123	Mr.	Gulzar Ahmed	Ahmed		123123123	Sind			

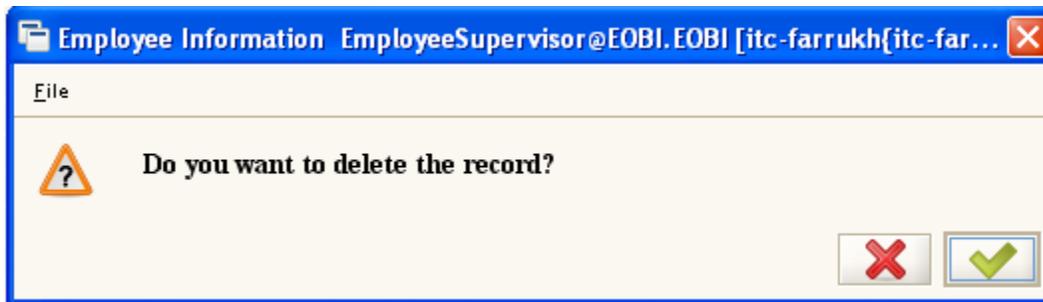
## 4.0 Using the System



Delete Record: Search and select the required record and press Delete Record button



A dialog box will appear to verify either you want to delete or not.



When user press OK button the selected record is deleted

910225				SYED IQBAL RAZA JAFRI								
FARIDA												
123	Mr.			Gulzar Ahmed	Ahmed		123123123	Sind				

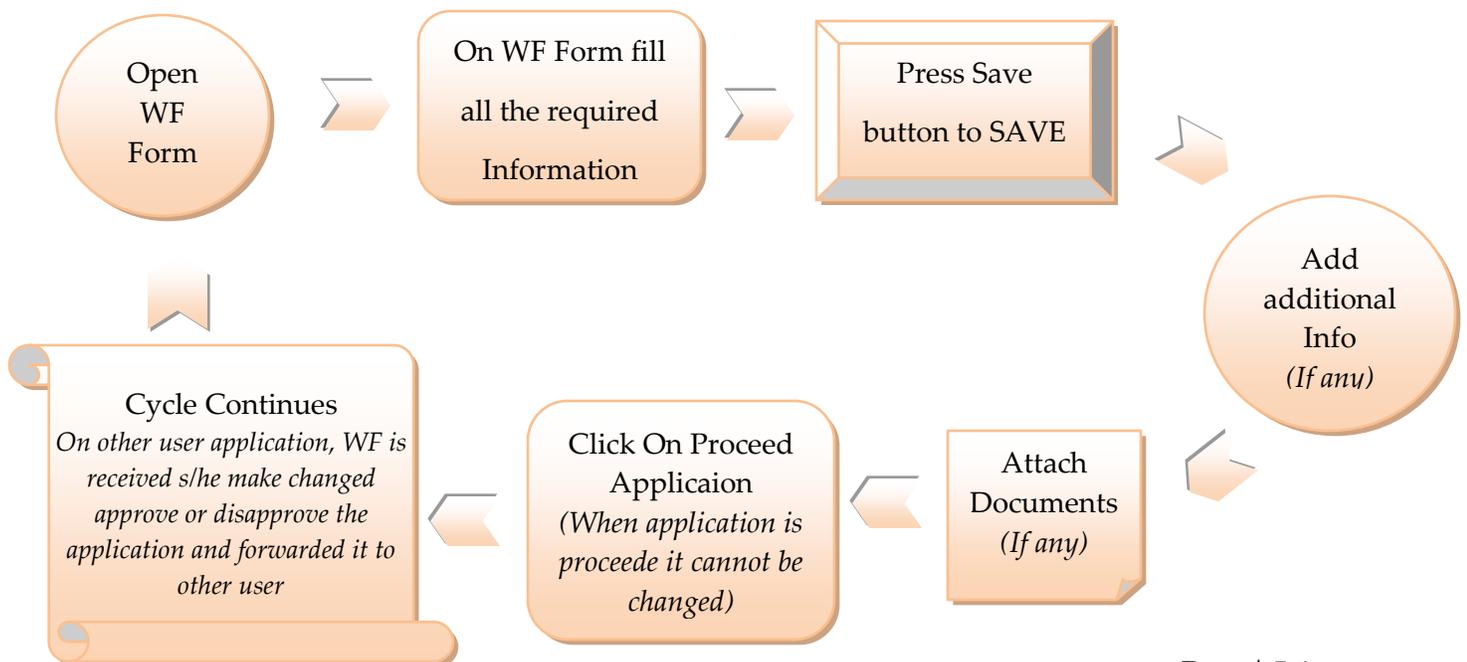
Work Flow

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## 5 WORK FLOW

This section describes the Workflow functionality in SBA. A Workflow is used to automate business procedures or "workflows." Items such as documents, information, or tasks are passed from one participant to another in a way that is controlled by certain rules or procedures. Workflow is usually defined as "steps involving people", whereas Business Process Management is defined as "workflow and system activities".

SBA ADempiere fully supports Business Process Management (BPM) and is based on the Workflow Management Coalition and OMG standards. In the following, we use the term Workflow to include BPM capabilities. In contrast to other ERP applications, Workflow is not "on top" of the application; SBA ADempiere is based on Workflow. The SBA ADempiere Workflow Engine is ADempiere's core transaction management. That means that all processes in SBA are automatically workflow enabled and easy to extend and modify. As workflow is completely integrated, SBA workflows are easier to maintain and can provide much more functionality than the external or add-on workflow offerings of some other ERP solutions. Simple WF system is shown in the following structure:

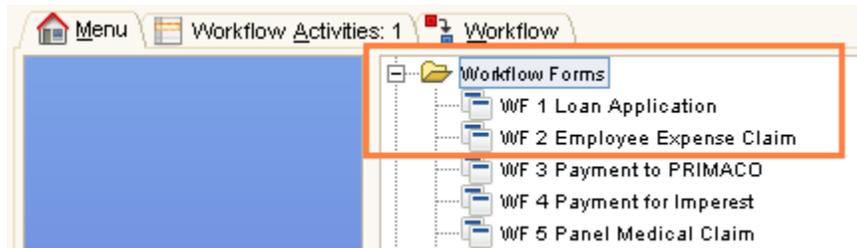


## 5.0 Work Flow

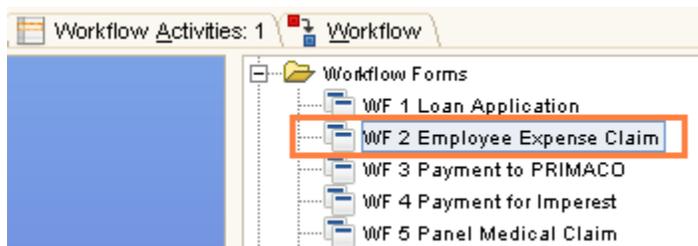
### 5.1 Work Flow Cycle

As describe earlier Workflow is usually defined as "steps involving people". For clarification purpose we are describing a workflow as an example all other workflow are generated and process in the way.

In the “Main Menu” click on the “Workflow Form” Module. The tree will be expanded.



Click on the required WF. In our case it is “WF 2 Employee Expense Claim”.



#### Ref# WF 2

Initiator: Employee

#### Work Flow:

- Employee fills the expense reimbursement form provided in SBA.
- Employee will attach the required documents with the form and send to HOD.
- HOD mark noting and send to F&A HOD.
- F&A HOD check the budget, verify and approve the case. HOD get the case approved by competent authority if require, otherwise send the case to Disbursement 1.
- Disbursement prepares the BPV and prints cheque. Send the case to Audit for verification.
- Audit verifies the case and payment and send back to Disbursement 1.
- Disbursement will post the BPV and issue the cheque.

5.0 Work Flow

**Outcome**

- Posted BPV
- Employee expense ledger updated

*Employee Starts Workflow:*

On the WF Form window press “New” button.



All fields will be clear and user can enter data.

Your name will be shown in Employee field. Enter all the required information and then press save button.



You have to save the details before proceeding to the next tab. Goto next tab press new button and enter all details.

Enter all details and press save button, to save changes in the table. If you want to enter more information (expencc claim type) regarding same claim press new button again and enter another type. Remember to press save button before entering a new claim type.

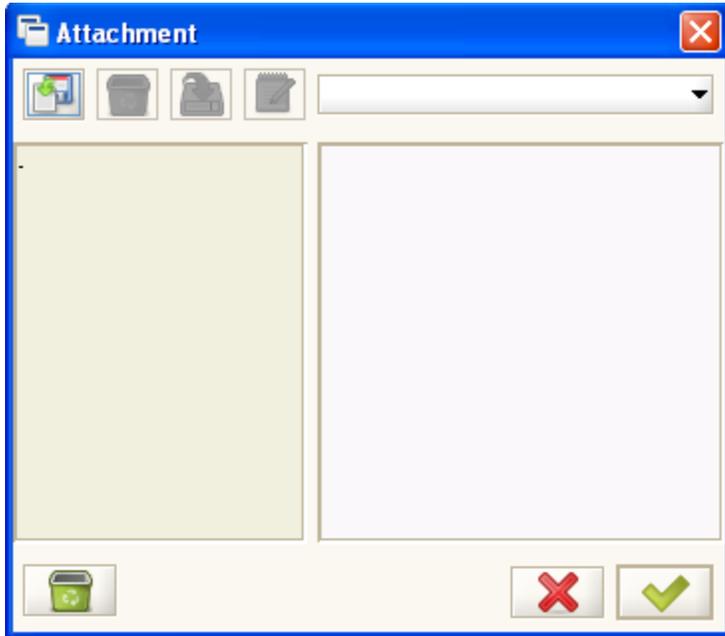
All Red/Pink fields shows that these fields are mandatory and record cannot be saved untill or unless user enter information in the mandatory fields.

After saving the claim you can now attach documents with WF. These documents are scanned copy of original documents. Press the attachment button to attach documents

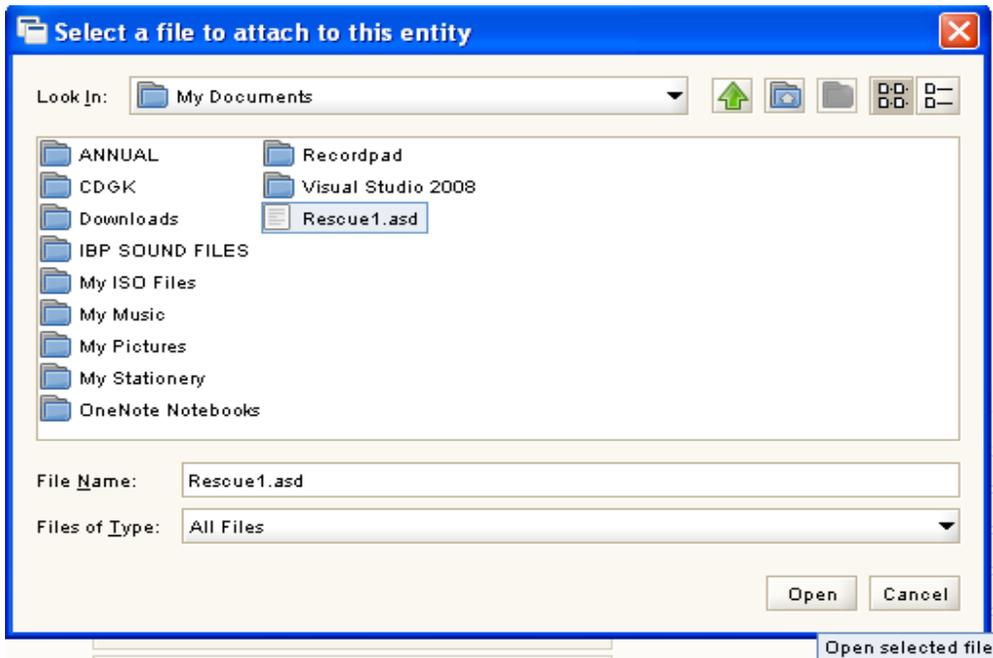


The attachment button will be disabled untill user press save button to save the records. These attachments are forwarded to HOD when user will precede the application.

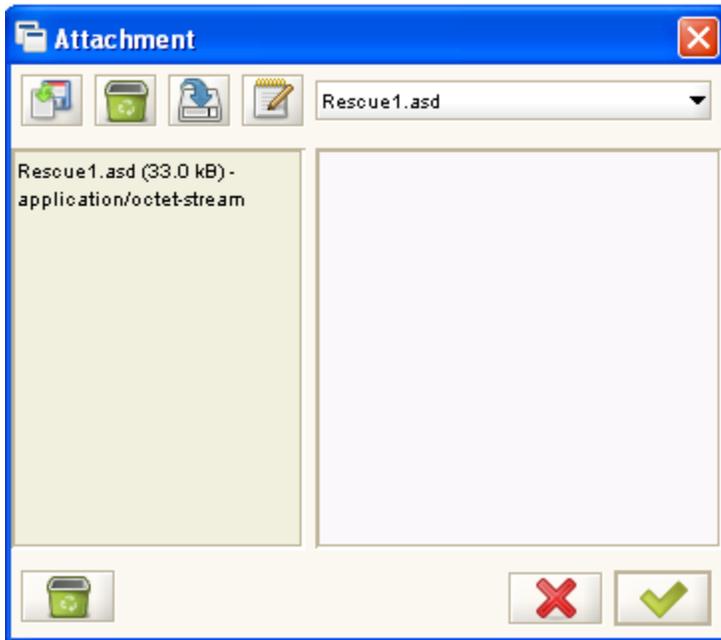
When user press attachment button the attachment window will be loaded. In this window user can load as many document as required.



This is the attachment window press load button to attach a file. When user press load button following window will appear, user can select the required file and press open.



When open button is press file is loaded in the attachment window.



Press  to attach the file to the WF. User also has the option to view the file, save it to another disk, delete it and/or add another file.



Add Attachment



Delete Attachment

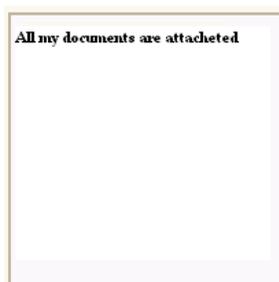


Save Attachment to disk



View Attachment

User can also write notes regarding each file



5.0 Work Flow

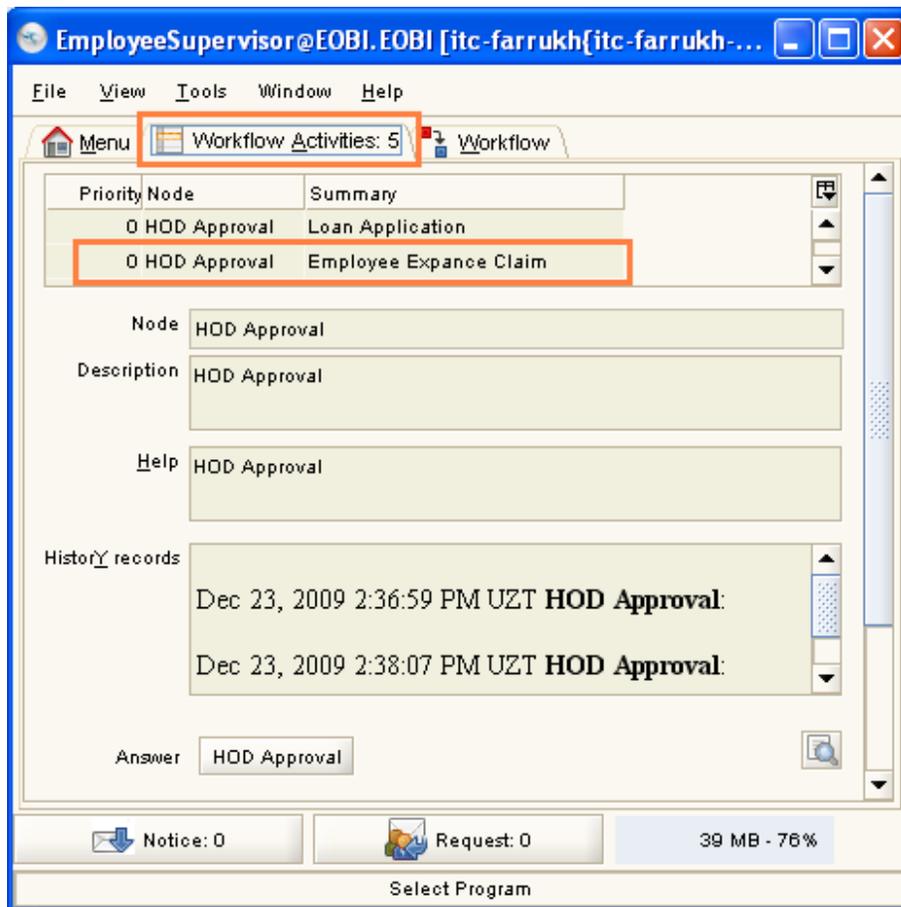
After attaching the document click on the “Proceed Application” button

File Number	FA-1000	<input checked="" type="checkbox"/> Proceed Application
Claim Number	5,555	
Claim Date	Jan 5, 2010 12:15:00 PM UZT	
Employee	S. GUL NAZIR SHAH	
Employee Expanc Type	Fuel Expense - CNG	
Total Quantity	1,000	
Unit	50	
Total Amount	60,000	
		<input checked="" type="checkbox"/> Active

Application will be preceded to the required user in our case HOD. When the application is preceded user cannot make any changes in the application.

*Workflow at HOD's End:*

HOD Log In to the system and check his/her WF activities



## 5.0 Work Flow

S/he press Answer button to view and to take action on the application



The application window will be loaded on HOD's system. This will show all the details entered by the employee.

HOD can perform following actions on the application. Approve the application and forward it, not approve it but forward it, reject it.

Application will be sent to F&A in the same way and actions will be taken in the similar pattern. Employee can check his/her application's status in Workflow activity section.

All Workflows are created and run in the similar way.

Reporting

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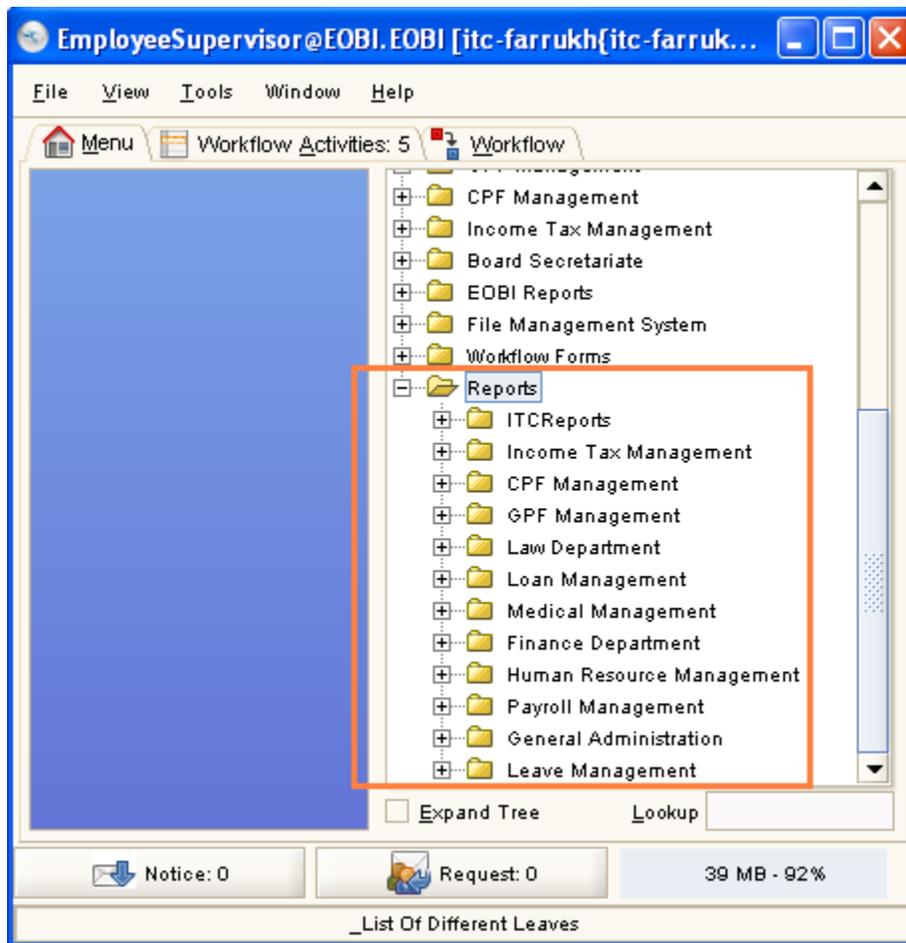
## 6.0 Reporting

### 6 REPORTING

The methodology of SBA Reporting tool is based on the idea of "straightforward and professional". The goal behind SBA's reporting methodology is to create an environment that is "instinctive" to users, and is associated with the way that the business works. This section describes all standard reports that can be generated by the system.

#### 6.1 Report Procedures

To create a report in SBA simply goto the Report Module in the Main Menu



All the available sub modules will be displayed. User can create the desire report by going in the sub module and clicking on the desire report.

## 6.0 Reporting

As an example we'll take HRM Module to create a simple report for employee. Click on Human Resource Management Module all sub modules will be displayed



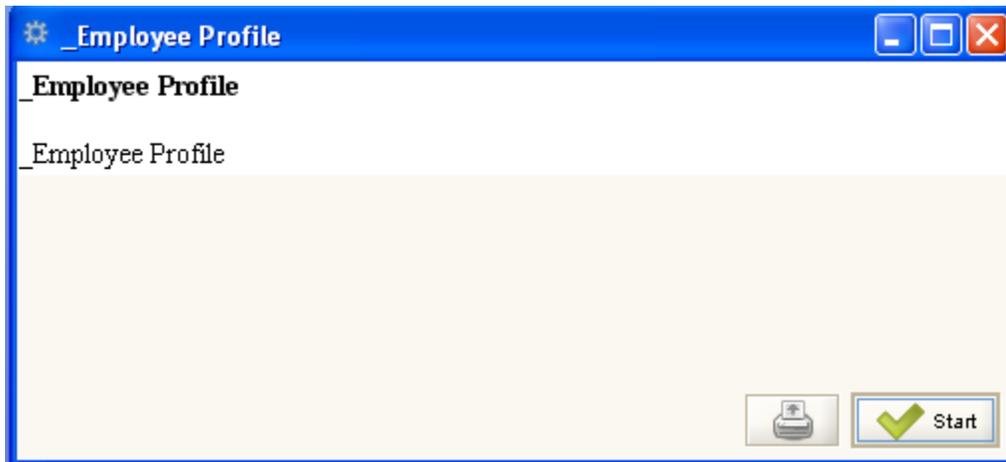
Click on Employee Management



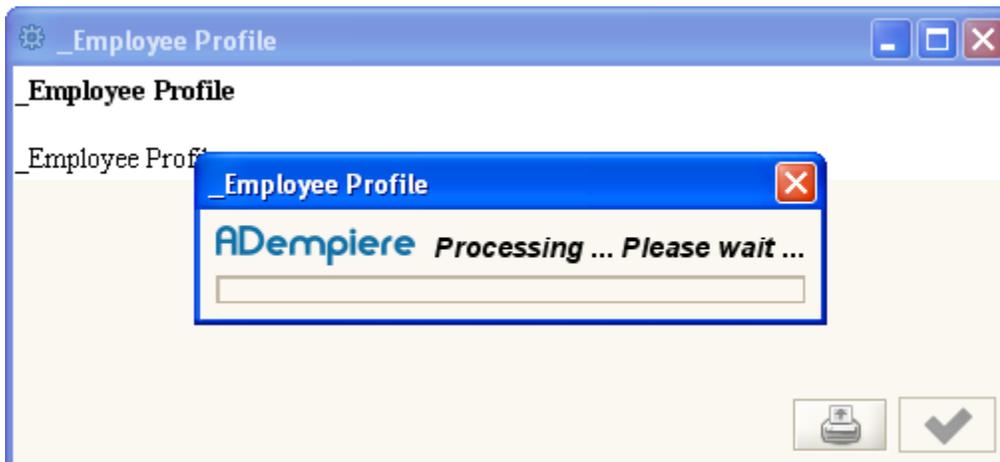
We are creating Employee Profile Report. Click on Employee Profile

A screenshot of a software window titled 'Lookup Record: Employee General Information'. The window has a blue title bar and a close button (X) in the top right corner. Below the title bar, there are two tabs: 'Lookup Record' and 'Advanced'. The main area of the window contains two text input fields: 'Personal Number' and 'Employee Name'. At the bottom of the window, there is a status bar with a document icon on the left, a red 'X' button and a green checkmark button in the center, and the text '1442 / 1442' on the right.

A lookup form will be open if user does not enter any ID or Name a profile report for all employees will be created. A window will be loaded, which will ask the user to either create the report or to print it.



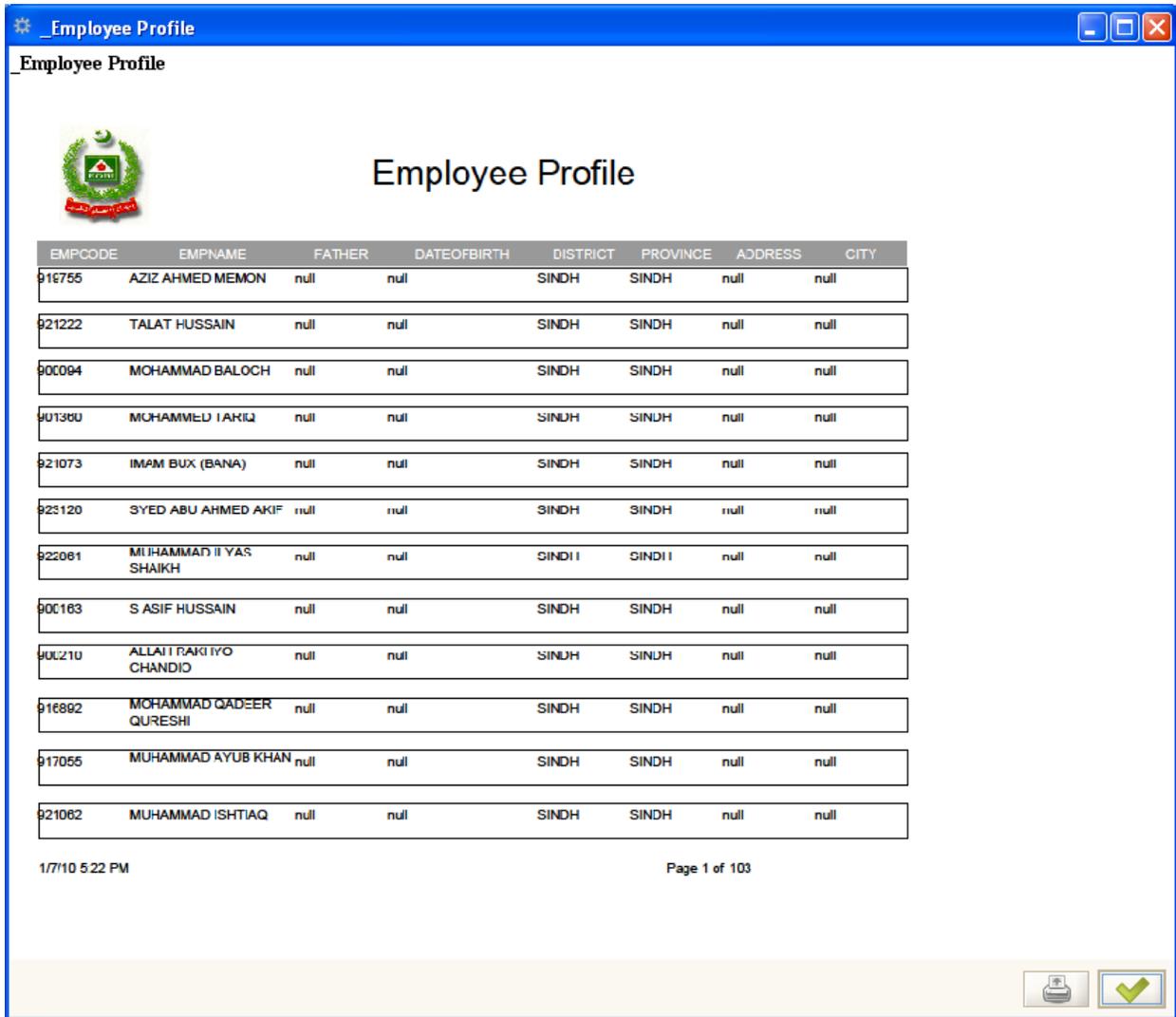
Click on start button to create the report. User can also directly print the report.



ADempiere will process the report and create it. User will have the option to print it after the creation of report.

## 6.0 Reporting

Employee Profile report is created. All reports are created in the same pattern.



EMPCODE	EMPNAME	FATHER	DATEOFBIRTH	DISTRICT	PROVINCE	ADDRESS	CITY
916755	AZIZ AHMED MEMON	null	null	SINDH	SINDH	null	null
921222	TALAT HUSSAIN	null	null	SINDH	SINDH	null	null
900094	MOHAMMAD BALOCH	null	null	SINDH	SINDH	null	null
901360	MOHAMMED IARIQ	null	null	SINDH	SINDH	null	null
921073	IMAM BUX (BANA)	null	null	SINDH	SINDH	null	null
923120	SYED ABU AHMED AKIF	null	null	SINDH	SINDH	null	null
922061	MUHAMMAD II YAS SHAIKH	null	null	SINDH	SINDH	null	null
900163	S ASIF HUSSAIN	null	null	SINDH	SINDH	null	null
900210	ALLAH I RAQIYO CHANDIO	null	null	SINDH	SINDH	null	null
916892	MOHAMMAD QADEER QURESHI	null	null	SINDH	SINDH	null	null
917055	MUHAMMAD AYUB KHAN	null	null	SINDH	SINDH	null	null
921062	MUHAMMAD ISHTIAQ	null	null	SINDH	SINDH	null	null

1/7/10 5:22 PM Page 1 of 103

All other reports are created in the same pattern.