SOP for Centralized System Administration Module

1.0 PURPOSE:

1.1 To provide a procedure for creation, closure of users, access rights distribution and audit trail checking in CSA module.

2.0 SCOPE:

2.1 This procedure is applicable to IT department.

3.0 RESPONSIBILITIES:

3.1 IT personnel is responsible for creation, closing of users, access rights distribution and providing access rights to the users.

3.2 IT department head / designee are responsible to provide the training and compliance to this SOP.

4.0 REFERENCES:

ERP Systems

Version No.:……………..

5.0 DEFINITIONS:

5.1 Enterprise Resource Planning:- Is a process by which a company (often a manufacturer) manages and integrates the important parts of its business. An ERP management information system integrates areas such as planning, purchasing, inventory, sales, marketing, finance and human resources.

6.0 PROCEDURE:

6.1 SOP for User Account Creation and Closing

6.1.1 Procedure for Location Wise Users

6.1.1.1 Specific Purpose

This process shall be used to define all ERP users working in the specified unit.

6.1.1.2 Steps to create Location wise Users

Step 1: Open Centralized System Administration Module
Select login into **……………..**
Put user id, password and pin
Click on login button

Step 2: Click on **Location and Users Management**, then click on **Users on header** and then Click on **Location Wise Users.**

Step 3: Click on New and select location.

Step 4: Modify and click on footer add button.

Step 5: Define user code and user's full name

Step 6: Save the data

Step 7: To Close the resigned users from the System, select the user code and define A/C closed as Y.

Step 8: To clear the screen, click on clear button

Step 9: To exit from the screen, click on exit

6.2 SOP for Access Rights Distribution.

6.2.1 Procedure for Location – Application wise User Accounts

6.2.1.1 Specific Purpose: This process shall be used to give access rights according to the work assigned.

6.2.1.2 Steps to create Location – Application wise User Accounts

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Location and Users Management**, then click on **User Accounts on Header** then Click on **Location – Application Wise User Accounts**

Step 3: Select location, Click on New and select Application module

Step 4: Modify and click on footer add button

Step 5: Select user code

Step 6: Tick Permit to E-mail Reports against each user code [As required]

Step 7: Save the data

Step 8: To close the resigned users from the System, select the user code and define A/C closed as Y.

Step 9: To clear the screen, click on clear button

Step 10: To exit from the screen, click on exit

6.2.2 Procedure for Application wise User Roles

6.2.2.1 Specific Purpose
This process shall be used to create standard profile as per user's position.

6.2.2.2 Steps to create Application wise User Roles

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Modules, Roles and Access Rights Management**, and then Click on **Application wise User Roles**

Step 3: Click on New and select Application module

Step 4: Modify and click on footer add button

Step 5: Define user role.

Step 6: Save the data

Step 8: To clear the screen, click on clear button

Step 9: To exit from the screen, click on exit

6.2.3 Procedure for Application wise Program Access Rights

6.2.3.1 Specific Purpose
This process shall be used to give view and edit access rights to users for master process

6.2.3.2 Steps to create Application wise Program Access Rights

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Modules, Roles and Access Rights Management**, and then Click on **Application wise Program Access Rights**

Step 3: Select module and click on Refresh button

Step 4: Select the desired Program Id. and click on view button to view the defined access rights.

Step 5: Select the desired Program Id. and click on view button to add or edit the access rights.

Step 6: From edit button, define program access restriction and master table update restriction (As applicable)

Step 7: Save the defined access rights

Step 8: To exit from the screen, click on exit

6.2.4 Procedure for Transaction Series Control (Post-GST)

6.2.4.1 Specific Purpose
This process shall be used to give access rights to users for transaction process

6.2.4.2 Steps to create Transaction Series Control (Post-GST)

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Transaction Control Management**, then click on **Tx. Type & Series on header** and then Click on **Transaction Series Control (Post-GST)**

Step 3: Select location, click on New and select transaction type.

Step 4: Modify and click on footer add button to add new code.

Step 5: Define code and series description

Step 6: Define other details as applicable against each code.

Step 7: Tick series closed as applicable against each code.

Step 8: Define access rights, series control information-1 and series control information-2 against each code for selected transaction type.

Step 9: Save the data

Step 10: To clear the screen, click on clear button

Step 11: To exit from the screen, click on exit

6.2.5 Procedure for Special Access Privileges

6.2.5.1 Specific Purpose:

This process shall be used to restrict user to specific location or access to all location

6.2.5.2 Steps to create Special Access Privileges

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Locations and Users Management**, then click on **User Accounts on Header** and then Click on **Special Access Privileges**

Step 3: Select location, click on New and select application module

Step 4: Select user role Id.

Step 5: Define access to other locations for the selected user role id.

Step 6: Save the data

Step 7: To clear the screen, click on clear button

Step 8: To exit from the screen, click on exit

6.3 SOP For Generation and Reset of Password and Pin

6.3.1 Procedure for Generate Password and Pin

6.3.1.1 Specific Purpose

This process shall be used to generate password and pin for all users or new users

6.3.1.2 Steps to create Generate Password and Pin

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin

Click on login button
Step 2: Select **Location and Users Management** then Click on **Users on header** and then Click on **Generate Password and Pin**

Step 3: To Generate New Password and Pin, Select location and Select users as New Users

Step 4: Click on Refresh button

Step 5: Select user code

Step 6: Click on Generate button given at footer.

Step 7: Select Password/Pin Generation Criteria as Generate Default and Click on Generate button to generate default Password and Pin.

Step 8: To Reset Password and Pin, Select location and Select users as All Users

Step 9: Now continue steps 4, 5, 6 and 7.

Step 10: To exit from the screen, click on exit

6.4 SOP for Reset of Existing Password and Pin by End Users

6.4.1 Procedure for Change Regular Password and Pin

6.4.1.1 Specific Purpose

This process shall be used to change password and pin for by the end users

6.4.1.2 Steps to Change Regular Password and Pin

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Click on My Setup, then Click on **Change Regular Password and Pin**
[**My Set up** is given in all modules which are using by End users]

Step 3: To change existing Password, Type Old Password and Old Pin. Press Enter

Step 4: Type New Password and Confirm Password. Press Enter

Step 5: Click on Change button given at the top right corner.

Step 6: To change existing Pin, Type Old Password and Old Pin. Press Enter

Step 7: Tick the Change Pin square box.

Step 8: Type New Pin and Confirm Pin. Press Enter.

Step 9: Now continue with step 5

Step 10: To exit from the screen, click on exit

6.5 SOP for Checking Logged in Current Users

6.5.1 Procedure for Show Current Users

6.5.1.1 Specific Purpose

This process shall be used to check which users are idle or inactive for defined time interval

6.5.1.2 Steps to check Current Users

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Click on **Servers Management**, then Click on **Application Server on Header** and then Click on **Show Current Users**

Step 3: Select Location and Click on Refresh Button given at the top right corner.

Step 4: Now to clear timed-out users, select the user code whose status is showing as “Timed Out” and click on Clear all timed-out users given at the left corner bottom.

Step 5: Now to clear idle users, select the user code whose status is showing as “Idle” and click on Clear Idle users given at the middle of the bottom.

Step 6: To exit from the screen, click on exit button.

6.6 SOP for Unlocking Locked Users

6.6.1 Procedure for Show Locked Users

6.6.1.1 Specific Purpose

This process shall be used to check locked users and to unlock locked users

6.6.1.2 Steps to Check Locked Users

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Click on **Servers Management**, then Click on **Application Server on Header** and then Click on **Show Locked Users**

Step 3: Select Location and Click on Refresh Button given at the top right corner.

Step 4: Now to Unlock Users, Select the user who is showing as “Locked” and click on Unlock users given at the right corner bottom.

Step 5: Now to clear idle users, select the user code whose status is showing as “Idle” and click on Clear Idle users given at the middle of the bottom.

Step 6: To exit from the screen, click on exit button.

6.7 SOP for Checking Users Session

6.7.1 Procedure for Examine Session Log

6.7.1.1 Specific Purpose

This process shall be used to check user's login session in the ERP

6.7.1.2 Steps to Examine Session Log

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Click on **Servers Management**, then Click on **Application Server on Header** and then Click on **Examine Session Log**

Step 3: Select **Location, Module, User Id.** and Click on Refresh Button given at the top right corner.

Step 4: Now system will display the Session Id's created on particular User id's.

Step 5: You can also check the Complete **Details** of Particular Session of users by Clicking on **Details Button** given at the middle of the bottom.

Step 6: To exit from the screen, click on exit button.

6.8 SOP for Checking Audit Trail

6.8.1 Procedure for Transaction Audit Trail Report

6.8.1.1 Specific Purpose

This process shall be used to generate transaction audit trail report

6.8.1.2 Steps to Check Transaction Audit Trail Report

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Click on **User Activity Monitoring**, then Click on **Reports on Header** and then Click on **Transaction Audit Trail Report**

Step 3: Select Transaction location code, transaction type code, date range

Step 4: Select output file type as Standard HTML Report File (HTM)

Step 5: Click on Create and View button to generate audit trail report.

6.8.2 Procedure for Master Audit Trail Report

6.8.2.1 Specific Purpose

This process shall be used to generate master audit trail report

6.8.2.2 Steps to Check Master Audit Trail Report

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Click on **User Activity Monitoring**, then Click on **Reports on Header** and then Click on **Master Audit Trail Report**

Step 3: Select App Module Txn Name, date range

Step 4: Select output file type as Standard HTML Report File (HTM)

Step 5: Click on Create and View button to generate audit trail report.

6.9 SOP for Application Modules Control Query

6.9.1 Procedure for Application Modules Control Query
6.9.1.1 Specific Purpose
This process shall be used to block or unblock application module

6.9.1.2 Steps to Check Application Modules Control

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Modules, Roles and Access Rights Management**, and then Click on **Application Modules**

Step 3: To Block Module, Click on Block Modules Button given at the bottom and If You Want to Block All Modules then Select All or Select Specific For Blocking of Particular Modules.

Step 4: To Unblock Module, Click on unblock Modules Button given at the bottom and If You Want to Unblock All Modules then Select all or Select Specific For Unblocking of Particular Modules.

Step 5: Now to Broadcast message to Users Before blocking Modules, select the **Broadcast Button** given at the bottom, and then enter a Broadcast Message into Broadcast Details and put Broadcast Repeat interval time and Clear Broadcast after time to clear the message.

Step 6: To exit from the screen, click on exit button at the Bottom.

6.10 SOP for Financial Year

6.10.1 Procedure for Open New Financial Year
6.10.1.1 Specific Purpose

This process shall be used to open new financial year

6.10.1.2 Steps to Open New Financial Year

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Transaction Control Management**, then click on **Financial Year on header** and then Click on **Open New Financial Year**

Step 3: Enter Year Id, from Date and To Date and then press Open to create new Financial Year.

Step 4: To exit from the screen, click on exit button at the Bottom

6.10.2 Procedure for Close Old Financial Year

6.10.2.1 Specific Purpose
This process shall be used to close old financial year

6.10.2.2 Steps to Close Old Financial Year

Step 1: Open Centralized System Administration Module
Select login into **ERP**
Put user id, password and pin
Click on login button

Step 2: Select **Transaction Control Management**, then click on **Financial Year on header** and then Click on **Close Old Financial Year**

Step 3: Select Year ID and then press Close Button to Close Old Financial Year.

Step 4: To exit from the screen, click on exit button at the Bottom

5.0 ATTACHMENTS:

- NA

8.0 ABBREVIATIONS:

Abbreviation	Full Form
SOP(s)	Standard Operating Procedure(s)
No.	Number
QA	Quality Assurance
qty.	Quantity
NA	Not applicable
CSA	Centralised System Administration
ERP	Enterprise Resource Planning

9.0 CHANGE HISTORY:

Change Control No.	Version	Reason for Changes