Entitlement Review Software – User Guide

**Key Features**

* **Automated Review Cycles** (Weekly, Monthly, Quarterly, Bi-Annually, Annually, Custom)
* **Multi-Application Support** (Centralized access management)
* **Role-Based Access Control** (Admin / Reviewer (HOD) / App Admin / Employee/User)
* **Excel Integration** (Template-based bulk upload for reviews, employees, HODs)
* **Email Automation** (SMTP-based notifications, reviewer reminders)
* **Audit Trail** (System activity logging, change logs)
* **Real-time Status Tracking** (Live view of review progress, active sessions)
* **Session Management** (Admin can view/terminate active user sessions)
* **Dynamic Rights Management** (Menu/Branch rights, tag-based, per app)
* **Export/Download** (Completed reviews exportable to Excel)

**Getting Started**

**System Requirements**

* Web Browser: Chrome / Firefox / Safari / Edge
* Network Access
* MongoDB & SMTP email configuration

**Initial Access**

1. Navigate to: http://ers.religare.in
2. Login via **email-based authentication**
3. Default password is set during registration or by admin (no longer always email)
4. Password Is Authenticated Using LDAP Active Directory.

**Navigation & Dashboard**

**Sidebar Menu (Role-Based)**

**Admin**

* **Frequency** → Configure review cycles
* **Applications** → Manage app permissions
* **Reviewers** → Reviewer/HOD management
* **Employees** → User management
* **Active Sessions** → View/terminate logged-in users
* **Create Review** → Start new review
* **Pending Reviews** → Reviews requiring action
* **Completed Reviews** → Review history
* **Upload Review Excel** → Bulk rights data
* **Upload Employee** → Employee bulk upload
* **Add New Admin →** Create New Admin

**App Admin**

* **Pending Reviews Notification** → Notify reviewers for pending reviews using email
* **Upload Review Excel** → Bulk review upload (for their apps)
* **Completed Reviews** → Review history

**Reviewer (HOD)**

* **Pending Reviews** → Reviews requiring action
* **Completed Reviews** → Review history

**Employee**

* View assigned rights, basic UI
* If Not Assigned Anything No Role Will Show Not Authorized

**Dashboard Header**

* Welcome message with current user
* Logout button

**🛠️ Application Management**

**Application List Columns**

* Name
* Frequency
* Description
* Admin Email
* App Rights (dynamic tags)
* Status (Enabled/Disabled)
* Action (Modify/Disable)

**Create/Modify Applications**

* Add/modify name, admin email, frequency, rights (dynamic input)
* Rights shown as dynamic tags (e.g., Allow USB, Email Logs)
* Disabled apps are hidden from active reviews and Excel uploads

**Employee & Reviewer Management**

**Employees**

* Columns: Name, Email, Reviewer, Status, Action
* Modify: Name, Email, Status toggle (real-time MongoDB update) from employee to reviewer
* Create: Fill form with name, email, assign reviewer

**Reviewers / HODs**

* Columns: Name, Email, Assigned Employees, Actions
* Modify details and password
* Passwords can be changed anytime if changed in ldap

🔄 Reviewer accounts must be bulk uploaded via Excel or upload employee bulk upload

**🔁 Frequency Management**

**Predefined Frequencies**

* Weekly (7 days)
* Monthly (30)
* Quarterly (90)
* Bi-Annually (180)
* Annually (365)

**Create Custom Frequency**

1. Go to: **Frequency → Create New Frequency**
2. Set: Name, Interval (days), Trigger day
3. Save and apply

**Review Workflow**

**Create New Review**

1. Select Application
2. Select Employee
3. Assign Reviewer
4. View current rights
5. **Click “Create Audit”**

**Pending Reviews**

* Filter by application
* View rights (dynamic by app)
* Add **Reviewer Remarks** (mandatory) if selected Modify otherwise can be written.
* Select Action: ✅ Retain | ❌ Revoke | ✏️ Modify
* Submit → Triggers email to app\_admin saying this review is completed.

**Completed Reviews**

* Tracks: Name, Rights, Reviewer, Action, Date
* Filter by application or view all
* Export to Excel (Only App Admin)

**📄 Excel Uploads**

**Upload Review Data**

* Go to: **Upload Review Excel**
* Select application
* Upload data using app-specific Excel template
* Validation checks rights formatting

Supported apps: Airwatch, Veritas (Email Archival), Druva (End Point Backup), USB Drive Access, RBMS, etc.

**Upload Employees**

* Go to: **Upload Employee**
* Download template → Upload Excel
* Template must include: Name, Email, Reviewer, Role

**Upload HODs**

* Bulk upload supported via Excel

**Email Notifications**

**Email System**

* Integrated using **SMTP + Nodemailer**

**Triggers**

* On review action taken
* Review completion
* **App Admin can notify reviewers for pending reviews**

**Email Recipients**

* **App Admin**: Full notification + rights
* **Reviewers**: Action confirmation, reminders
* **Employees**: Review completion

**Email Content**

* App Name
* Rights info
* Action taken
* Timestamp
* Performed by

**Roles & Permissions**

**Admin**

* Full access: Users, apps, system config
* Can create more Admins
* Can view/terminate active sessions

**App Admin**

* Manages reviews and notifications for their assigned applications
* Can upload reviews in bulk for their apps

**Reviewer (HOD)**

* Review interface only
* Past review visibility

**System Administration**

**Audit Logging**

* Logs every action with: User, Timestamp, Old & New Values, Type of change

**Password Management**

* Default password is set at registration or by admin curl command only for super admin
* Domain specific email will will verified using active directory / ldap

**Session Monitoring**

* Admin can view all currently logged-in users and terminate sessions

**System Monitoring**

* MongoDB connectivity
* SMTP email check
* Excel template versions

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