**eSALN**
**Schemasters**

# eSALN

# USER MANUAL

Version 1.4

August 01, 2023

A step-by-step user guide to getting started on the Electronic Statement of Assets, Liabilities and Net Worth application

Authors:
Jaycee Brigola, Jan Miles Cruz, Denelle Dione Rosales, Daryll John Ugot

# Table of Contents

# List of Figures

# List of Tables

# 1. Introduction

The eSALN Application is designed to streamline the process of preparing and managing financial declarations, particularly for government officials, public servants, and individuals required to submit their Statement of Assets, Liabilities, and Net Worth (SALN) as mandated by law or organizational policies. The application aims to simplify filling out the SALN form, perform accurate calculations of assets, liabilities, and net worth, and maintain an organized database of users' financial records. It caters to users with varying technical expertise, ensuring ease of use and accessibility for both technical and non-technical individuals.

As the eSALN Application evolves, its developers prioritize the implementation of database backups to safeguard against data loss hence, for the regular monitoring of the system to identify and address any potential security vulnerabilities. Future versions may include a sign out feature and further updates to improve the user interface, enhance data processing capabilities, and introduce new functionalities based on user feedback and changing regulatory requirements. Furthermore, the eSALN Application places a high priority on data security and privacy. It incorporates robust security measures, including access controls that restrict user access to specific information and user authentication to prevent unauthorized entry. Moreover, the application adheres strictly to privacy regulations, ensuring that users' financial data remains confidential and is not shared with unauthorized parties.

## 1.1 Overview

This project makes use of the Statement of Assets, Liabilities, and Net Worth (SALN) form and aims to develop a functional application that utilizes a Database Management System (DBMS) to hold, manage, and retrieve SALN information effectively and with ease. Additionally, to create a user-friendly interface for users to add, view, edit, or delete their SALN records. The application provides electronic version of form used in collecting information regarding the SALN. Its operational status is completed but improvements can still be made.

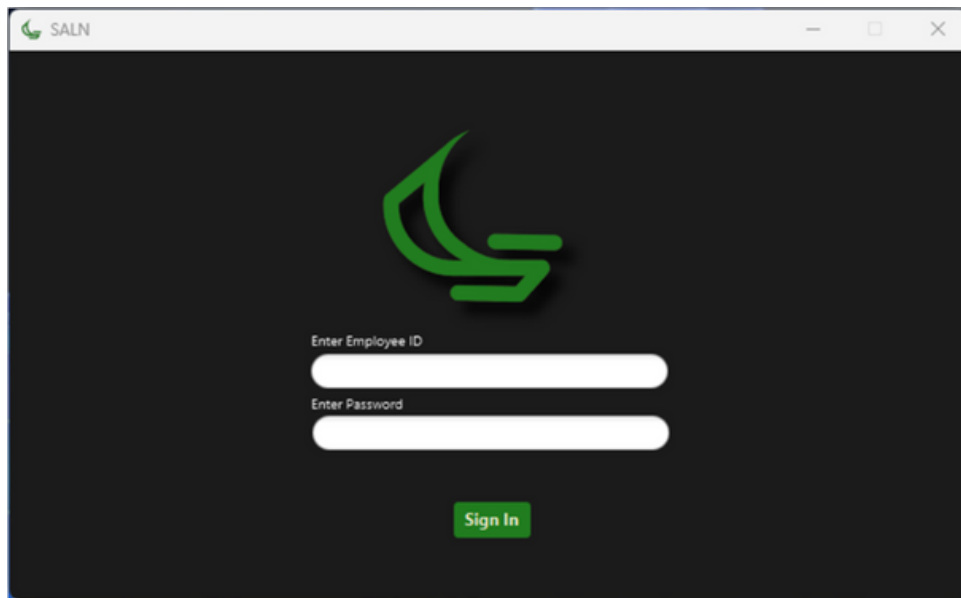# 2. Getting Started

- User Log In Page



*Figure 2.1*

- User Dashboard
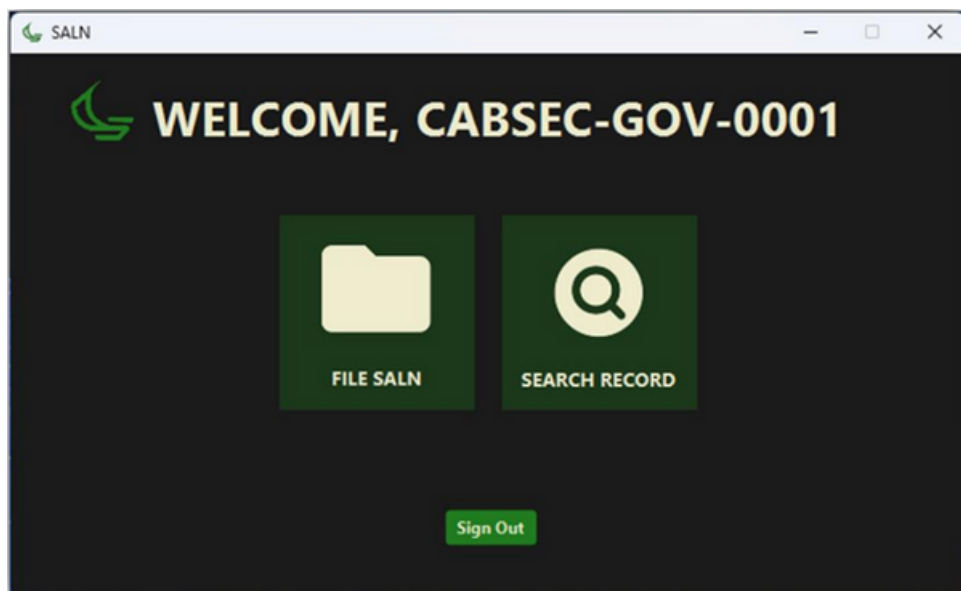


*Figure 2.2*

- Declarant Scene



*Figure 2.3*

- Spouse Scene



*Figure 2.4*

- Unmarried Children Below 18 Scene



*Figure 2.5*

- Real Property Scene



*Figure 2.6*

- Personal Property Scene


*Figure 2.7*

- Liability Scene


*Figure 2.8*

- Summary Scene



*Figure 2.9*

- Search and Delete Scene



*Figure 2.10*

- Update Scene



*Figure 2.11*

## 2.1 Cautions & Warnings

- Make sure that all the information you will be stating in the form is true and transparent.

- Failure to file the SALN or dishonesty in doing so, warrants the suspension of one to six months for the first offense, and dismissal from service for the second offense which, when warranted, may also lead to forfeiture of ill-gotten or unexplained wealth.

- The submission of a SALN is required by law under Article XI Section 17 of the 1987 Constitution and Section 8 of Republic Act No. 6713, the "Code of Conduct and Ethical Standards for Public Officials and Employees." It includes a waiver authorizing the Ombudsman or his authorized representatives to attain documents that may show assets, liabilities, net worth, business interests, and financial connections from all appropriate government agencies.

# 2.2 Setup Considerations

- ·Users' Devices: Users access the SALN application through their personal computers, laptops, tablets, or smartphones.

- ·Application Server: The application is hosted on a control center that manages user requests, data processing, and communication with the database.

- ·Database Server: This server hosts the Database Management System (DBMS) where all SALN records are stored. The DBMS ensures data integrity, security, and efficient retrieval of information.
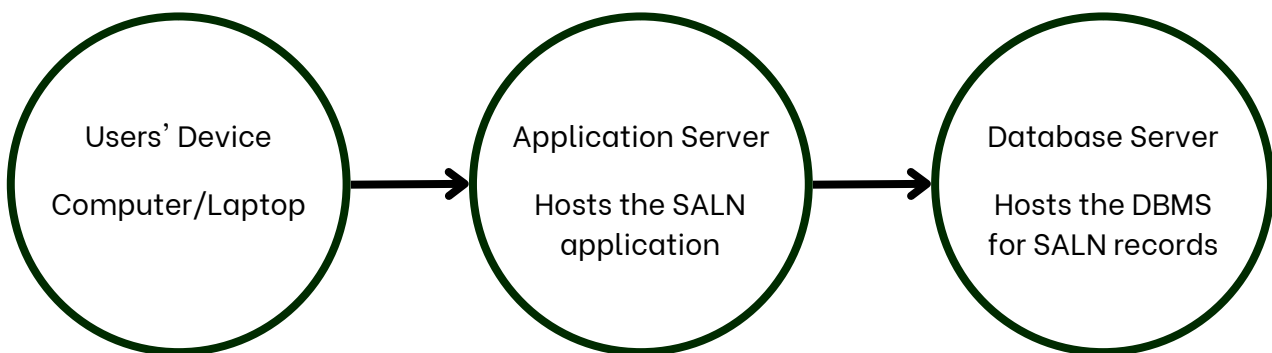


*Figure 2.2.1*

- Users interact with the SALN application using these input and output device/s:

- Input Devices: Include keyboards, mice, touchscreens, and similar devices.

- Output Devices: Users can view information and results from the application on their monitors/computer screens.

**Set-Up Considerations:**

- **Access Controls:** Setting up user permissions and access levels, ensuring that only authorized personnel can access specific data and perform certain actions within the application.

- **Data Encryption:** For enhanced privacy, consider implementing data encryption techniques that conceal certain sensitive information, displaying only the necessary details to users with the right permissions.

- **User-friendly:** Uses an easy-to-follow format that walks users through the process of entering their financial information, viewing records, and submitting declarations.

# 2.3 User Access Considerations

1. Administrator:
    - Responsibilities: Manage user accounts, configure system settings, oversee data integrity.
    - Access: Full access to all features and information including the database system.
    - Permissions: Create, modify, search, and delete user accounts; configure system settings; access all information.

.

2. Government Employee/User:
    - Responsibilities: Submit their own SALN reports every year, view their own financial data, update their records, and capable of deleting their filed reports.
    - Access: Limited to their own submitted reports and financial data.
    - Permissions: Create and submit reports, access own submitted reports and data.

# 2.4 Accessing the System

Follow these specific steps to gain access to the system. This section covers the processes required for getting an employee ID, login into the system, and updating or resetting a password.

**Obtaining an Employee ID:**
1. Only those employees from the government may it be a public official, or a simple employee of the government are eligible to file SALN.
2. If you are a new user, you need to contact the system administrator to request employee access to the system.
3. Submit any required documents such as identification requested by the administrator.
4. Upon verification, the administrator will create a unique Employee ID for you and will add your credentials to the verified employee database.

**Logging on to the System:**
1. Open the eSALN application on your computer or laptop. If it is already installed on your device. Otherwise, you need to install it. You can download the application on the link provided by your system administrator.
2. Once the eSALN has been installed, open it and provide the assigned Employee ID and password in the designated fields.
3. Click the 'Sign In' button to proceed.

**Changing and Resetting Forgotten Password:**
1. Contact the system administrator to change or reset your password.
2. Fill out the needed documents containing the reason for modifications together with the new password, and submit them to the system administrator.

# 2.5 System Organization & Navigation

This section offers an overview of the eSALN (Electronic Statement of Assets, Liabilities, and Net Worth) application's structure and covers the key functions and its capabilities.

**System Home Page**

Once you were able to sign into the application successfully, you will be redirected to the eSALN application's homepage. It provides a simple yet intuitive dashboard that displays the user's Employee ID and the first two main functions of the application: File your eSALN and look for eSALN records.

**Navigation Paths**

1. **Dashboard**:
   - Access: Directly available on the home page.
   - Description: The dashboard displays your Employee ID together with the functionalities to submit your eSALN and look for your previous submitted records on the database.
2. **Submit eSALN:**
   - Access: Typically, accessible from the main menu or a prominent button on the dashboard.
   - Description: This function allows you to create and submit your electronic Statement of Assets, Liabilities, and Net Worth.
3. **Look for your eSALN records:**
   - Access: Found in the dashboard, labeled as 'Look for records'.
   - Description: Navigate here to review and access a list of your previously submitted eSALN reports.
4. **Logout the System:**
   - Access: Commonly located in the upper-right corner of the screen.
   - Description: Clicking this option securely logs you out and exits your eSALN application.

# 2.6 Exiting the System

Exiting the eSALN (Electronic Statement of Assets, Liabilities, and Net Worth) system properly protects data protection and prevents unwanted access. To properly quit the system, follow these steps:

1. **Complete Pending Processes:** If there are any ongoing processes or transactions, ensure they are completed or canceled appropriately before exiting. Leaving processes unfinished may lead to data inconsistencies or errors.
2. **Close the Application Window:** Once all necessary steps are taken, close the application window by clicking on the "X" button in the top-right corner or using the appropriate method for your operating system.
3. **Sign Out Button:** If there are no necessary actions required, you can click the Sign out button on the homepage to exit the system securely.

# 3. Using the System

The following sub-sections provide detailed, step-by-step instructions on how to use the various functions or features of the Electronic Statement of Assets, Liabilities and Net Worth (eSALN).

### 3.0.1 Sign in Page or Authentication Page

- **Description:** This function allows users to access the eSALN program securely by providing their Employee ID and password.
- **Input:** User must enter their Employee ID and Password.
- **Output:** Upon successful login, users are directed to the system dashboard, which provides an overview of their account and two primary features of the eSALN application. The sign out button is also accessible in the employee's dashboard.
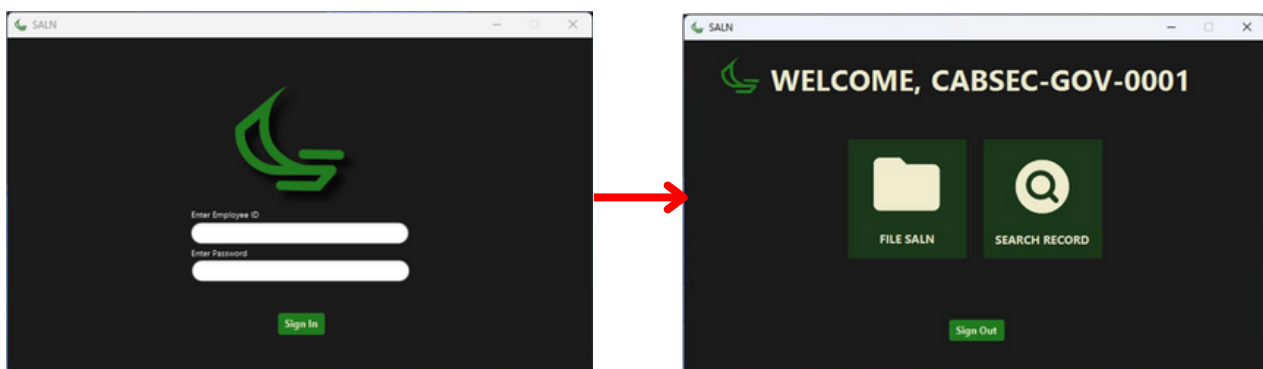


*Figure 3.1*

### 3.0.2 Filing eSALN

- **Description:** Users can create a new electronic Statement of Assets, Liabilities, and Net Worth (eSALN) form by clicking the File SALN function in the menu.
- **Input:** User must enter appropriate values in the Declarant. Spouse, Children, Real and Personal Properties, and Liabilities scenes if applicable.
- **Output:** Completing the form, the system will generate a summary showing the subtotals, totals, and the calculation of the Net Worth.
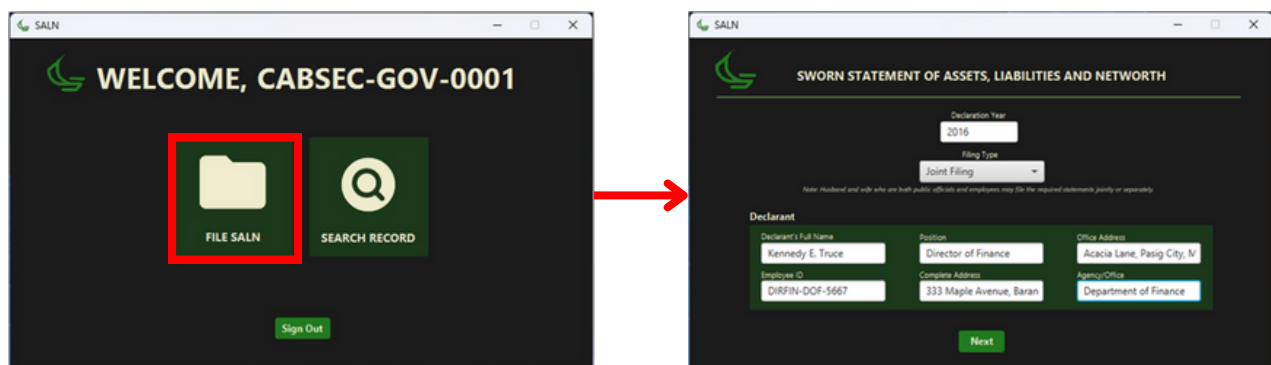


*Figure 3.2*

### 3.0.3 Viewing and Modifying eSALN records

- **Description:** Enables the user to search for their records by clicking the Seach Record function in the menu. User can also modify their records by double-clicking the selected information in the result table.
- **Input:** User must choose a table they want to view, their Employee ID, and the Declaration Year.
- **Output:** The eSALN system will display the result on the result table.
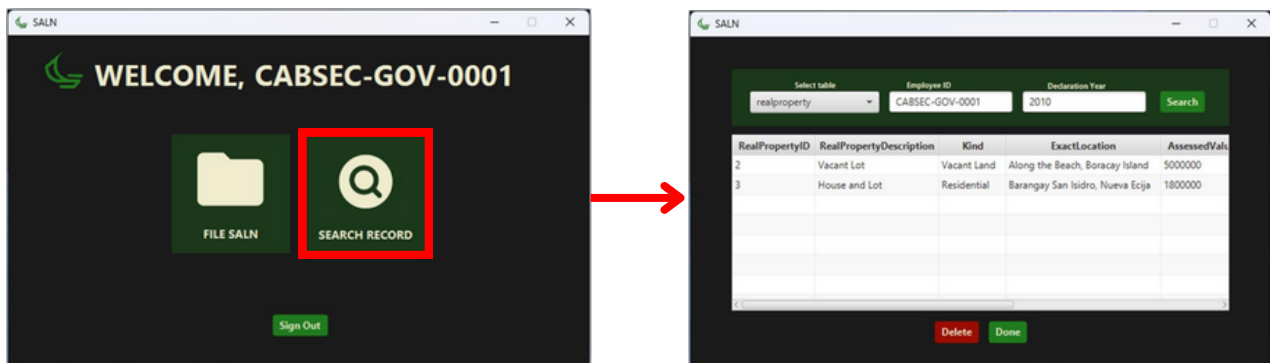


*Figure 3.3*

### 3.0.4 Deleting eSALN records

- **Description:** Enables the user to delete their eSALN records.
- **Input:** User must select row to delete on the selected table.
- **Output:** The eSALN system will delete the selected row from the database. When the result table is refreshed, the deleted information will not exist.
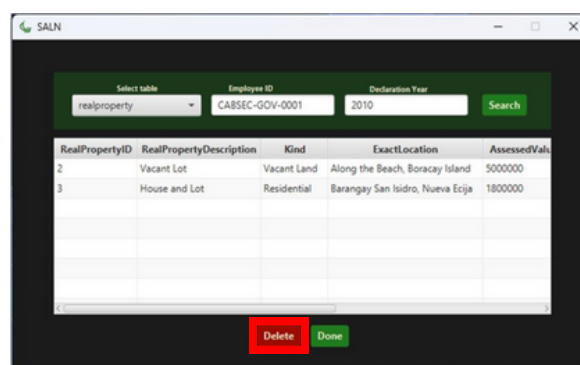


*Figure 3.4*

# 3.1 Given Function or Feature

1. **User Sign In Page**
   - Enter your assigned Employee ID and password.
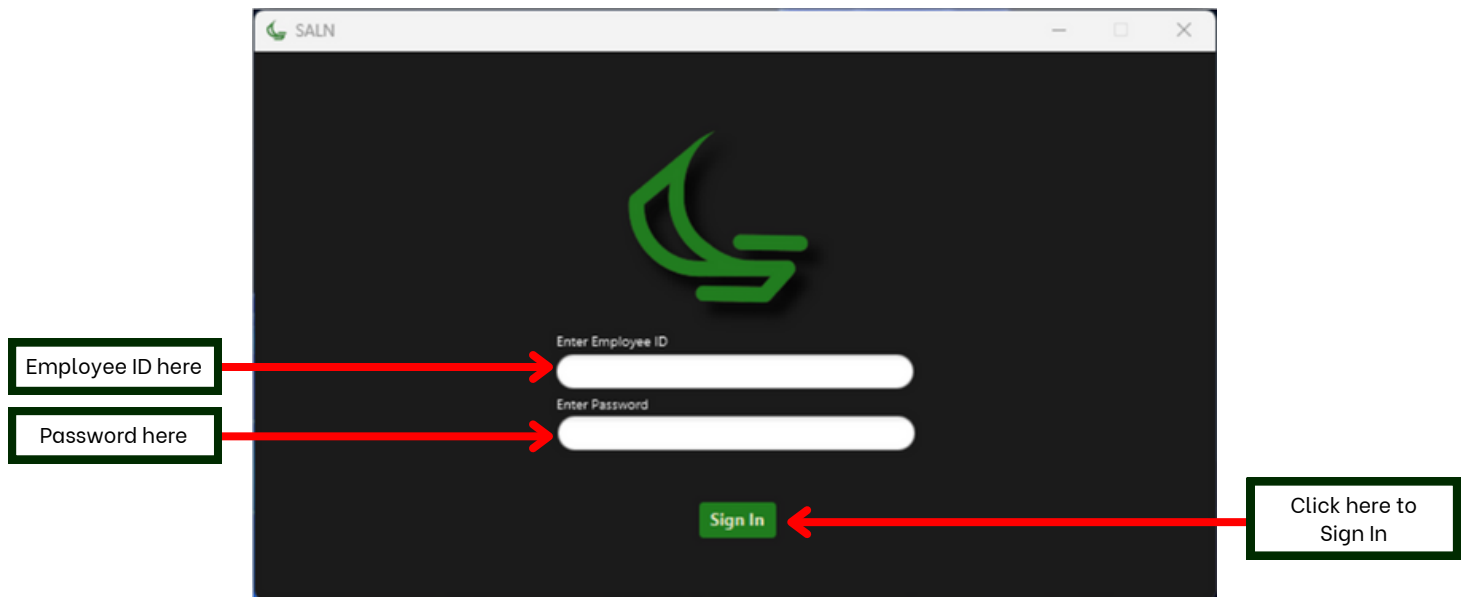


*Figure 3.1.1*

2. **Filing a new SALN**
   - After signing in you will be redirected to the user dashboard. From here you can File a new SALN or search an existing file.
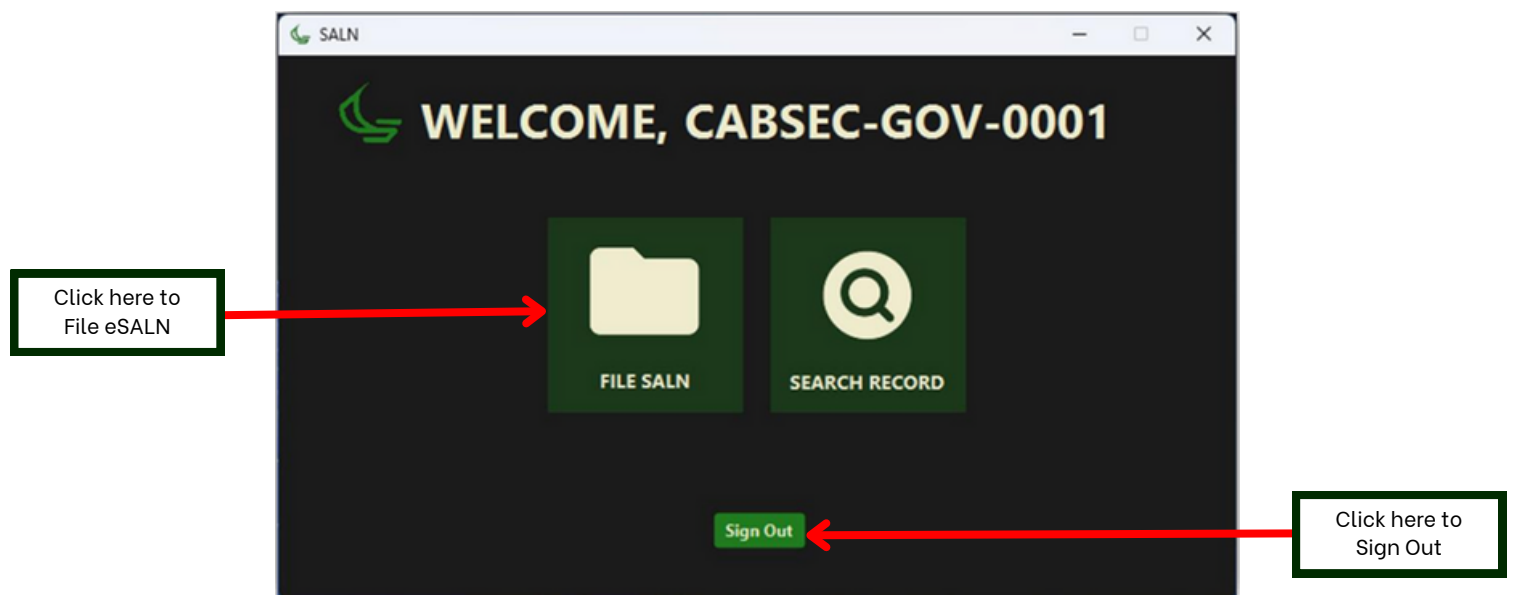


*Figure 3.1.2*

### 2.1 **Filing a new SALN (Declarant Scene)**

○ After clicking "File SALN" you will be directed to the Declarant Scene where you will fill out every required information such as: Declaration Year, Filing Type, Full Name, Employee ID, Position in the government, Office Address, Complete Residence Address, and Agency Office.



*Figure 3.1.3*

### 2.2 **Filing a new SALN (Spouse Scene)**

○ Click **'Next'** after completely filling out all required sections. After clicking 'Next' you will be directed to spouse scene to fill out all required information such as: Spouse Name, Spouse Position in the government, Spouse Office Address, and Spouse Agency Office.



*Figure 3.1.4*

### 2.3 Filing a new SALN (Unmarried Children Below 18 Scene)

○ After filling out the spouse information click 'Next' button and you will be redirected to unmarried children below 18 scene, fill this out with the required information. If applicable, input appropriate information to fields such as: Child's Full Name, Birthdate, and Age.



*Figure 3.1.5*
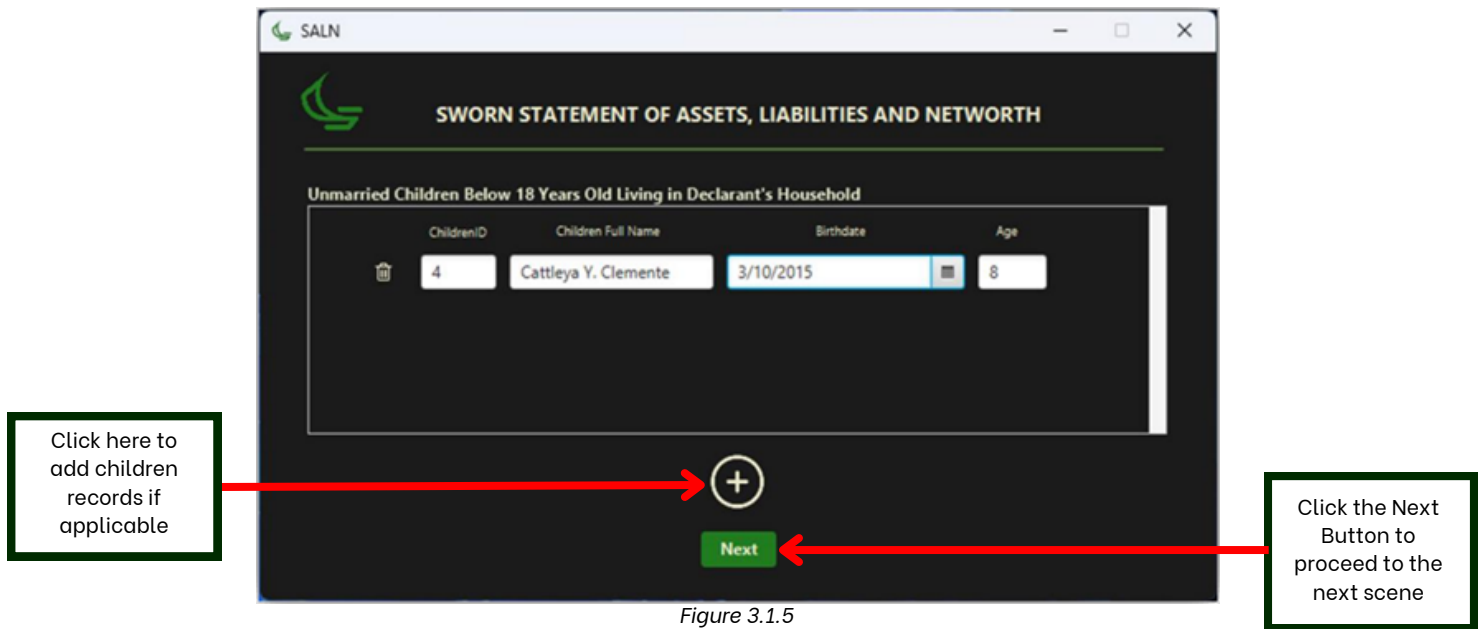
### 2.4 Filing a new SALN (Real Property Scene)

○ After filling out all the unmarried children below 18 years old information click 'Next' and you will be directed to real property scene, fill it out with the required information. If it is applicable to you, enter information such as: Real Property Description, Kind, Exact Location, Assessed Value, Market Value, Acquisition Year, Acquisition Mode, and Acquisition Cost.



*Figure 3.1.6*
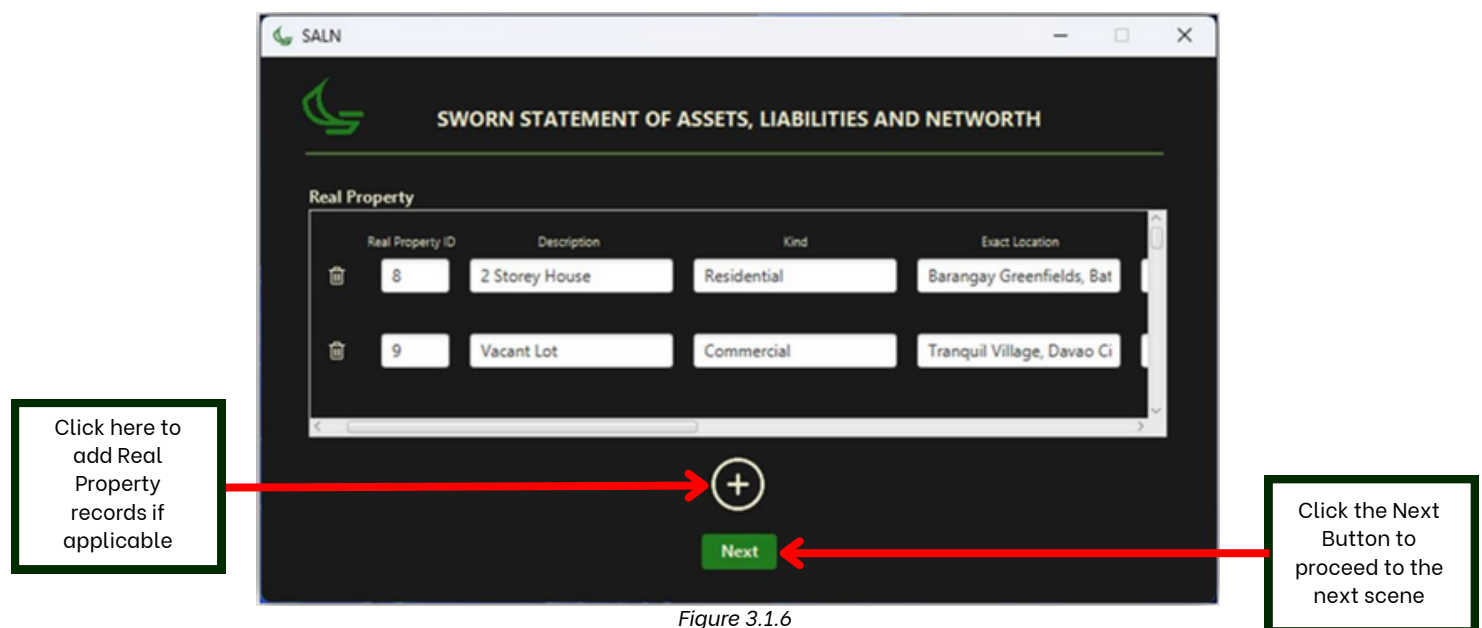
## 2.5 **Filing a new SALN (Personal Property Scene)**

○ After filling out all required information in real property scene click 'Next' and you will be directed to Personal Property scene where you will also fill out every required information. If applicable, input data such as: Personal Property Description, Year Acquired, and its Acquisition Cost.



*Figure 3.1.7*
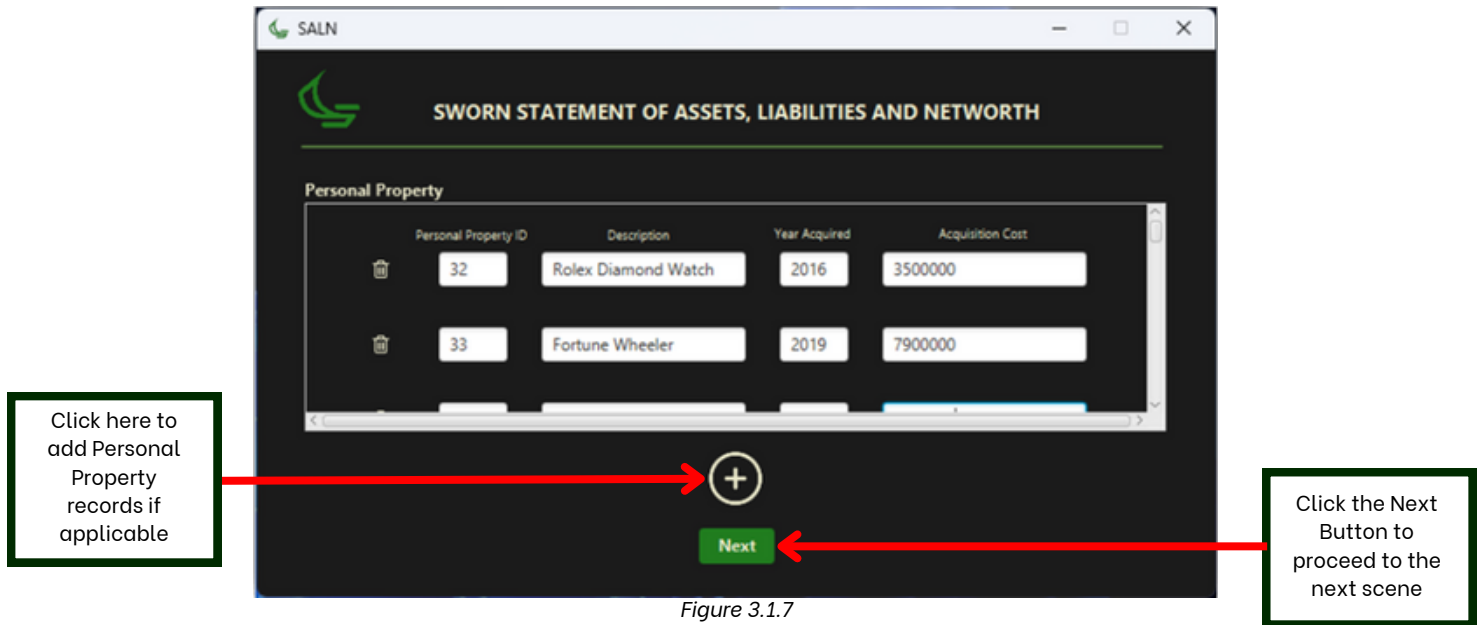
## 2.6 **Filing a new SALN (Liability Scene)**

○ After filling out the Personal Property scene with the required information click 'Next'. You will be redirected to Liability scene and you need to fill out every required information. If applicable, input data such as Liability nature, Creditor's Name, and Outstanding Balance.



*Figure 3.1.8*
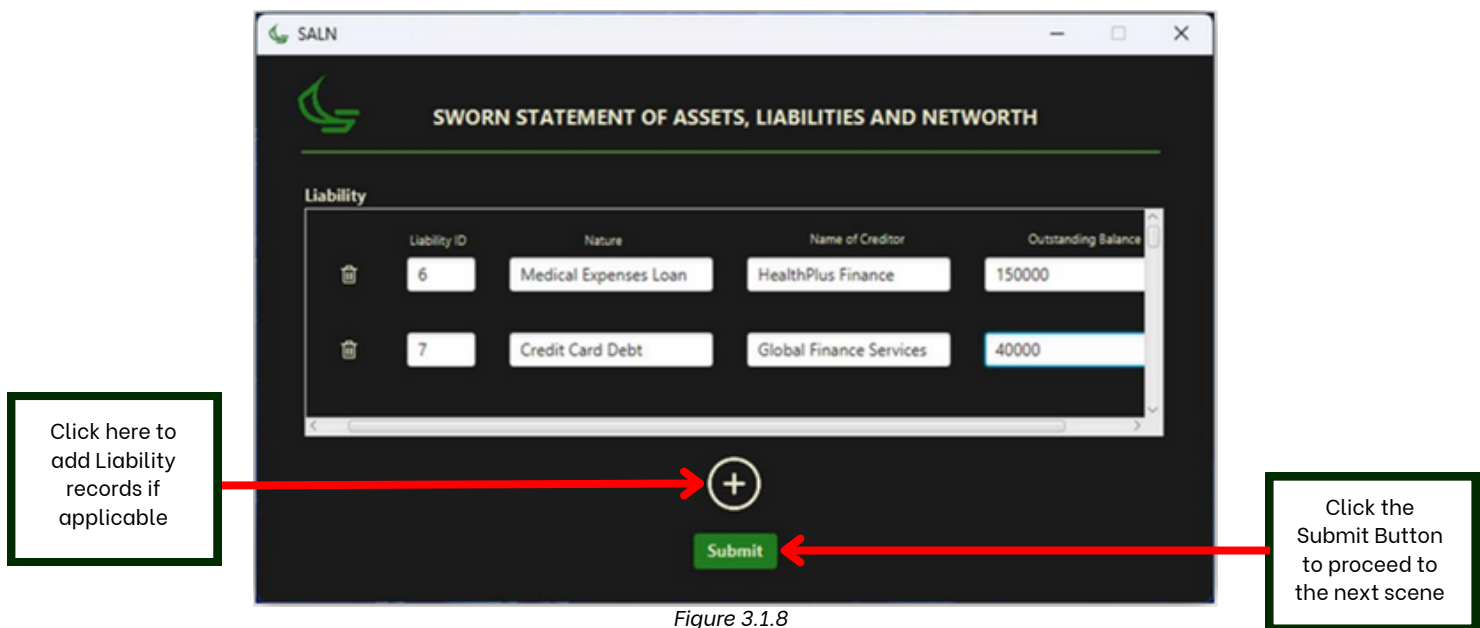
### 2.7 Filing a new SALN (Summary Scene)

○ After filling out the required information in liability scene click 'Submit' and you will be directed to the summary of the SALN where Employee ID, declaration year, real property subtotal, personal property subtotal, total assets, total liabilities, and net worth will be displayed.



Click Done Button to return to Employee's Dashboard

*Figure 3.1.9*

### 3. Search Existing Records

○ After clicking 'Done' you will be directed to user dashboard again.



Click here to look for an existing record

*Figure 3.1.10*

### 3.1 Search Existing Records (Search and Delete Scene)

○ From here you can select a table to search on and you can also delete a record by clicking a specific cell in the result table and clicking Delete Button.
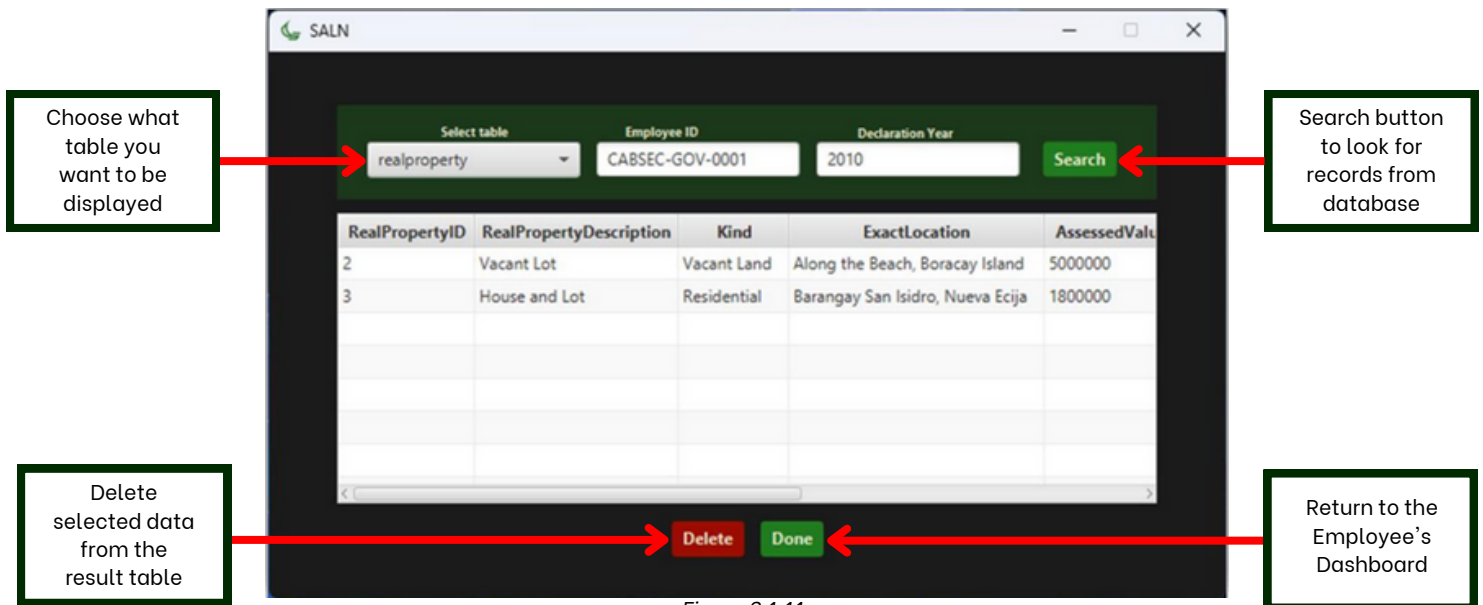


*Figure 3.1.11*

### 3.2 Search Existing Records (Update Scene)

○ You can modify an existing record by double clicking a record in the result table.
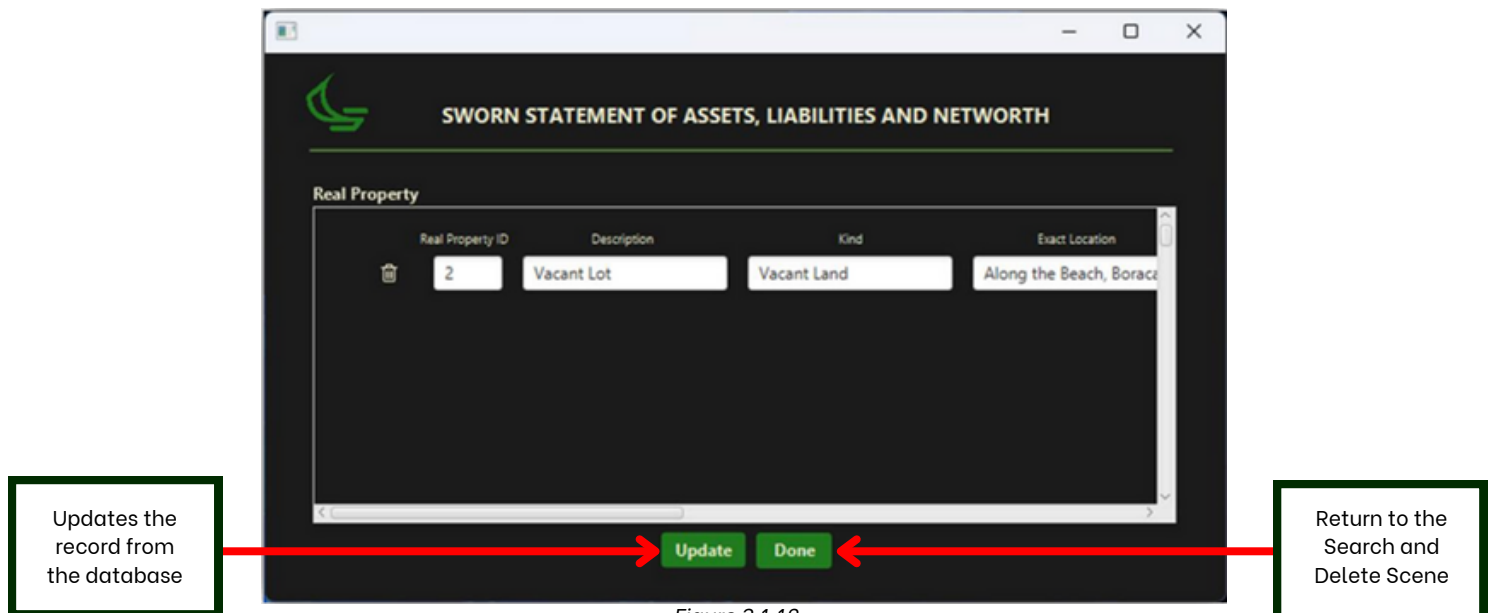


*Figure 3.1.12*

# 3.1.1 Given Sub-Function or Sub-Feature

- Children ID, Real Property ID, Personal Property ID, and Liability ID are auto generated by the system.



*Figure 3.13*

- Subtotals, totals, and Net worth are automatically calculated by the system.



*Figure 3.14*

# 4. Troubleshooting and Support

Users may face numerous error circumstances or challenges when utilizing the eSALN (Electronic Statement of Assets, Liabilities, and Net Worth) program. To assist users in navigating potential challenges, this section discusses common error scenarios as well as the accompanying recovery and error correction methods.

### 4.1.0 **Sign in and Authentication Issues**
- Users are unable to log in or encounter authentication issues.

   **Troubleshooting Actions**
   1. Passwords are case sensitive. Ensure that you are entering appropriate Employee ID and password.
   2. If you have forgotten your password, contact the system administrator.
   3. Ensure that you are connected to the internet and your connection is stable and active.
   4. Try to close and restart the program.
   5. If the error persists, contact the support team or the system administrator for assistance.

### 4.1.1 **Submission Errors**
- Users are unable to submit or encounters error messages when submitting their eSALN forms.

   **Troubleshooting Actions**
   1. Make sure that all mandatory fields on the system are filled out accurately.
   2. Review error messages. It provides information about missing or incorrect entries.
   3. Try refreshing or restarting the system.
   4. If the error persists, contact the support team or the system administrator for assistance. Provide details about the error you had encountered.

### 4.1.2 **Connectivity Issues**
- Users experience connectivity problems while using the eSALN application.

   **Troubleshooting Actions**
   1. Ensure that you are connected to your appropriate database.
   2. Check the network connectivity between the application and the database server.
   3. Try refreshing or restarting the system.
   4. If the error persists, contact the support team or the system administrator for assistance.

# 4.1 Error Messages

Users may see several problem warnings when utilizing the eSALN (Electronic Statement of Assets, Liabilities, and Net Worth) program. These notifications can give useful information about the nature of the problem and point users in the right direction. The following are some frequent error signals, as well as their potential causes and possible solutions:

1. **Invalid Employee ID and Password**

**Causes**
- Incorrect input of Employee ID and password in the application fields
- Your account is restricted or locked
- You do not have an existing account

**Possible Corrective Actions**
- Ensure that your Employee ID and password are correct based on the database
- If password is forgotten, contact the system administrator
- Verify that your account is not restricted or locked
- Ensure that you have an existing account to access the application

2. **Required Field Missing**

**Causes**
- Mandatory fields in the application have not been filled out

**Possible Corrective Actions**
- Fill out all the mandatory fields in the application before submitting
- Review your eSALN form for any missing information or incomplete entries

3. **Unable to Connect to Database Server**

**Causes**
- The database server is not installed on your device
- The database server is not active and running
- Incorrect hostname in the application's database configuration

**Possible Corrective Actions**
- Install appropriate database server on your device
- Open and start the database server if it is not running
- Double-check the database hostname in the application's configuration

# 4.2 Support

If you have any technical problems or need assistance when using the eSALN (Electronic Statement of Assets, Liabilities, and Net Worth) program, please contact our support staff right away. Our professional support staff is here to assist you with any difficulties you may have. Here are the contact information and information you need to receive help:

| Contact | Organization | Phone | Email | Role | Responsibility |
|---|---|---|---|---|---|
| Jaycee Brigola | Polytechnic University of the Philippines | 09452645653 | itsmejayceebrigolatigas@gmail.com | System Administrator/ Developer | Handles user management, system configuration, Security Management and even support. |
| Jan Miles Cruz | Polytechnic University of the Philippines | 09519538012 | janmilescruz596@gmail.com | Application Manager | Ensures the application is accessible, responsive, working, and meets user expectations. |
| Denelle Dione Rosales | Polytechnic University of the Philippines | 09354692276 | rosalesdenelle@gmail.com | Application Support | Responds to user reports, inquiries, and issues. Helps solve problems encountered by the user |
| Daryll John Ugot | Polytechnic University of the Philippines | 09951339930 | darylljuan005@gmail.com | IT Help Desk | Assists with technical and network issues |

*Table 1. Support Points of Contact*

If you come across any challenges while utilizing the eSALN application, kindly adhere to the subsequent instructions for reporting the issue and obtaining assistance:

**Reach out to our Support:** Should you encounter technical difficulties or have inquiries about the application, you have an option to get in touch with our specialized support using the provided contact numbers or email addresses on the table.

**Furnish Detailed Information:** When seeking assistance, it is advisable to furnish comprehensive details concerning the encountered issue. This should encompass any error messages received, a step-by-step replication of the problem, and pertinent information regarding your device, database you are using, or network environment.

**Timely Response:** Our support team is committed to delivering a prompt response to your inquiry. It is important to note that the response time may fluctuate based on the complexity and severity of the particular issue.

**Security Incident Handling:**

If you suspect a security breach related to the eSALN system, please take the following steps:

1. Immediately contact your organization's security team or designated security point of contact.
2. Inform our support team about the security incident so that appropriate measures can be taken on our end to assist in investigation and resolution.

# Appendix A: Record of Changes

This section serves as a thorough history of how the eSALN (Electronic Statement of Assets, Liabilities, and Net Worth) User Manual has changed through time. This record of changes preserves the numerous versions, their associated creation dates, the authors of these versions, and brief explanations detailing the logic behind each revision. This record of changes is updated as the manual is refined and updated to ensure accuracy and usability.

In order to provide insight into the iterative development process that the eSALN User Manual has been through, the table shown below provides a chronological overview of these adjustments. This open approach not only makes it easier to monitor the manual's development, but it also gives users important context for understanding the improvements and changes made to better their experience.

| Version Number | Date | Author/Owner | Description of Change |
|---|---|---|---|
| 1.0 | August 02, 2023 | Denelle Dione Rosales | Initial version of the eSALN user manual |
| 1.1 | August 03, 2023 | Jan Miles Cruz | Created Section 1, 2.2, and 2.6 in the eSALN user manual |
| 1.2 | August 06, 2023 | Jaycee Brigola | Created Table of Contents, Section (2.3, 2.4, 2.5, 3, 4, 4.1, and 4.2) in the eSALN user manual<br><br>Updated Section 2.6, 3.1, and 3.1.1 in the eSALN user manual |
| 1.3 | August 07, 2023 | Daryll John Ugot | Created Appendix B: Glossary and Appendix D: Approvals |
| 1.4 | August 08, 2023 | Jaycee Brigola | eSALN User manual reconstruction and finalization |

*Table 2. Record of Changes*

# Appendix B: Glossary

In this appendix, terms that may not be known to readers but are used in this document are briefly defined. For ease of use, the terms are arranged alphabetically.

| Term | Acronym | Definition |
|---|---|---|
| Acquisition Mode | | Means of acquiring real property, such as donation, inheritance, construction, trust, mortgage, or trade. |
| Application Server | | Is a type of server that hosts and manages software applications and services for clients or users over a network. |
| Application Window | | Refers to the graphical user interface (GUI) window or screen of a software application where the user interacts with the application's features and functions. |
| Assessed Value | | It is the value estimated by a local government assessor who evaluates the property based on characteristics such as similar sales, location, condition, square footage, and so on. |
| Assets | | A property possessed by a person or company that is thought to be valuable and available to pay debts, commitments, or legacies. |
| Creditor | | A person or company who lends money or provides services to another person or company in exchange for repayment. |
| Data Encryption | | Is a process of converting plaintext data into ciphertext using an algorithm and an encryption key to protect sensitive information and ensure its confidentiality and integrity. |
| Database Management System | DBMS | A software system that allows users to define, create, manage, and manipulate databases. |

| Term | Acronym | Definition |
|------|---------|------------|
| Database Server | DS | Is a computer or a specialized hardware system that is dedicated to running a database management system (DBMS) and managing one or multiple databases. |
| Electronic Statement of Assets, Liabilities and Net Worth | eSALN | A developed application that allows public officials to file their SALN records. |
| Exact Location | | Includes the street, town, and province where the property is located. |
| Input Devices | | Is a hardware component or peripheral that allows users to enter data, commands, or information into a computer or electronic device. |
| Liabilities | | Legally binding obligations that are payable to another person or entity. |
| Liability Nature | | Refers to the type or category of debt or obligation, such as a mortgage, personal loan, credit card, and so on. |
| Market Value | | The price at which an asset would trade in a competitive auction. |
| Net Worth | | The total wealth of an individual, company, or household, taking account of all financial assets and liabilities. |
| Output Devices | | Is a hardware component or peripheral that displays or presents processed data or information from a computer or electronic device to the user. |
| Outstanding Balance | | The amount owed on any interest-bearing debt, such as a credit card. |
| Personal Property | | Movable property; anything other than land and buildings that are subject to ownership. |
| Personal Property Description | | A specific description of personal property owned. |

| Term | Acronym | Definition |
|---|---|---|
| Real Property | | A parcel of land and everything that is permanently attached to the land. |
| Real Property Description | | A general description of the real property owned (e.g., 10-story building, vacant lot, warehouse). |
| Real Property Kind | | Classified according to its general use as residential, commercial, agricultural, industrial, or special purpose. |
| Statement of Assets, Liabilities and Net Worth | SALN | A document that provides an overview of an individual's financial standing by detailing their assets, liabilities, and net worth. |
| User-friendly | | Refers to a design or feature that is easy to understand, navigate, and use, particularly for the intended users. |

*Table 3. Glossary*

# Appendix C: Referenced Documents

An overview of the connections between this text and other pertinent documents is given in this appendix. It also contains identifying information for any documents that were used to create or are cited in this document.

| Document Name | Document Location and/or URL | Issuance Date |
|---|---|---|
| 2015 SALN Form | https://csc.gov.ph/downloads/category/224-statement-of-assets-liabilities-and-net-worth-form?download=2062:2015-saln-form-ms-word-format | January 23, 2015 |
| Frequently Asked Questions (FAQ) on the SALN | https://csc.gov.ph/downloads/category/224-statement-of-assets-liabilities-and-net-worth-form?download=2061:frequently-asked-questions-faq-on-the-saln | August 28, 2019 |
| Agency-Review-and-Compliance-Procedure-for-SALN | https://www.dbp.ph/wp-content/uploads/2018/10/Agency-Review-and-Compliance-Procedure-for-SALN.pdf | January 05, 2019 |

*Table 4. Referenced Documents*

# Appendix D: Approvals

The undersigned acknowledge that they have reviewed the User Manual and agree with the information presented within this document. Changes to this User Manual will be coordinated with, and approved by the undersigned, or their designated representatives.
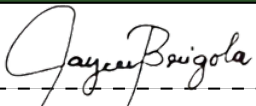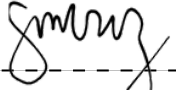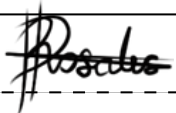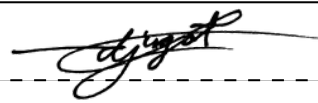
| Document Approved By | Date Approved |
|---|---|
| | August 08, 2023 |
| **Name:** Jaycee T. Brigola, **Job Title:** System Administrator/Developer – **Company:** Schemasters | Date |
| | August 08, 2023 |
| **Name:** Jan Miles Cruz, **Job Title:** System Developer – **Company:** Schemasters | Date |
| | August 08, 2023 |
| **Name:** Denelle Dione Rosales, **Job Title:** Project Manager – **Company:** Schemasters | Date |
| | August 08, 2023 |
| **Name:** Daryll John Ugot, **Job Title:** Project Manager – **Company:** Schemasters | Date |

*Table 5. Approvals*