Sumi Motherson Travel AppRoval System

(STARS)

ADMINISTRATOR GUIDE
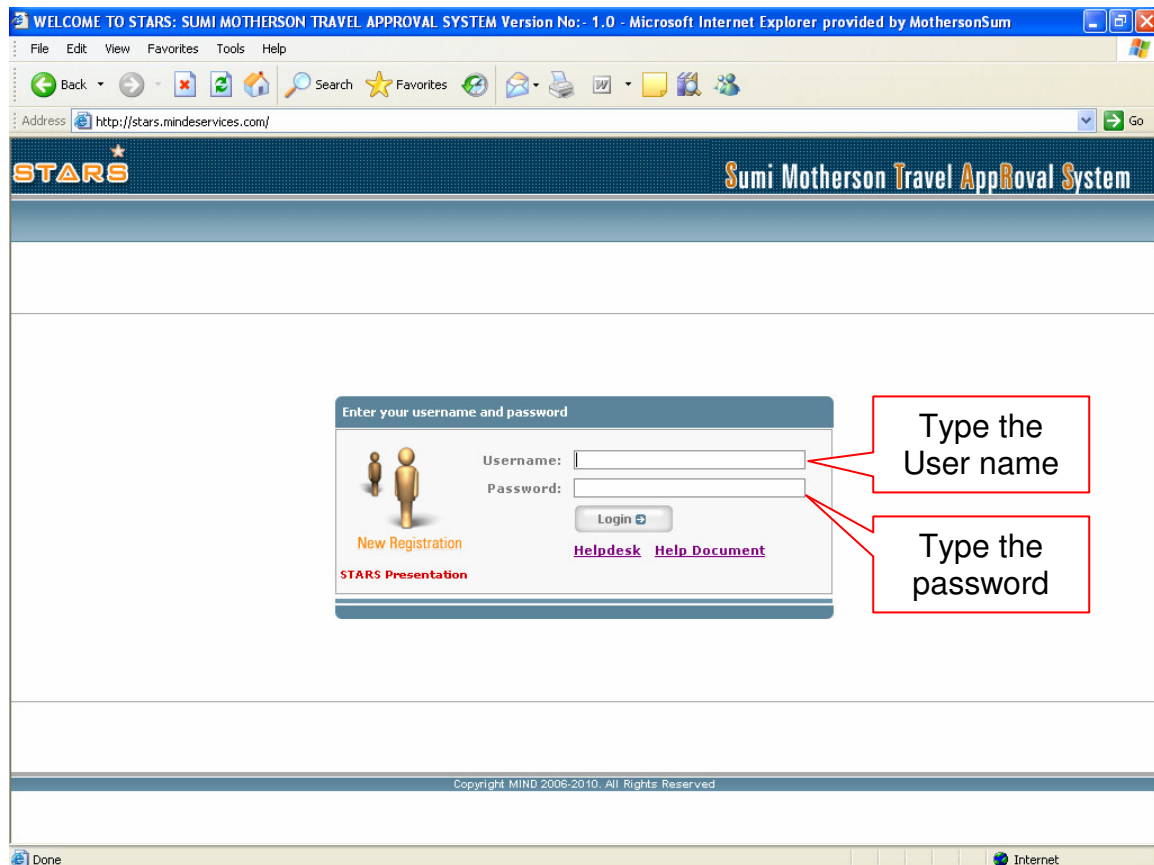
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How to access the STARS?

In internet Explorer, type the below mentioned URL of STARS and press enter.
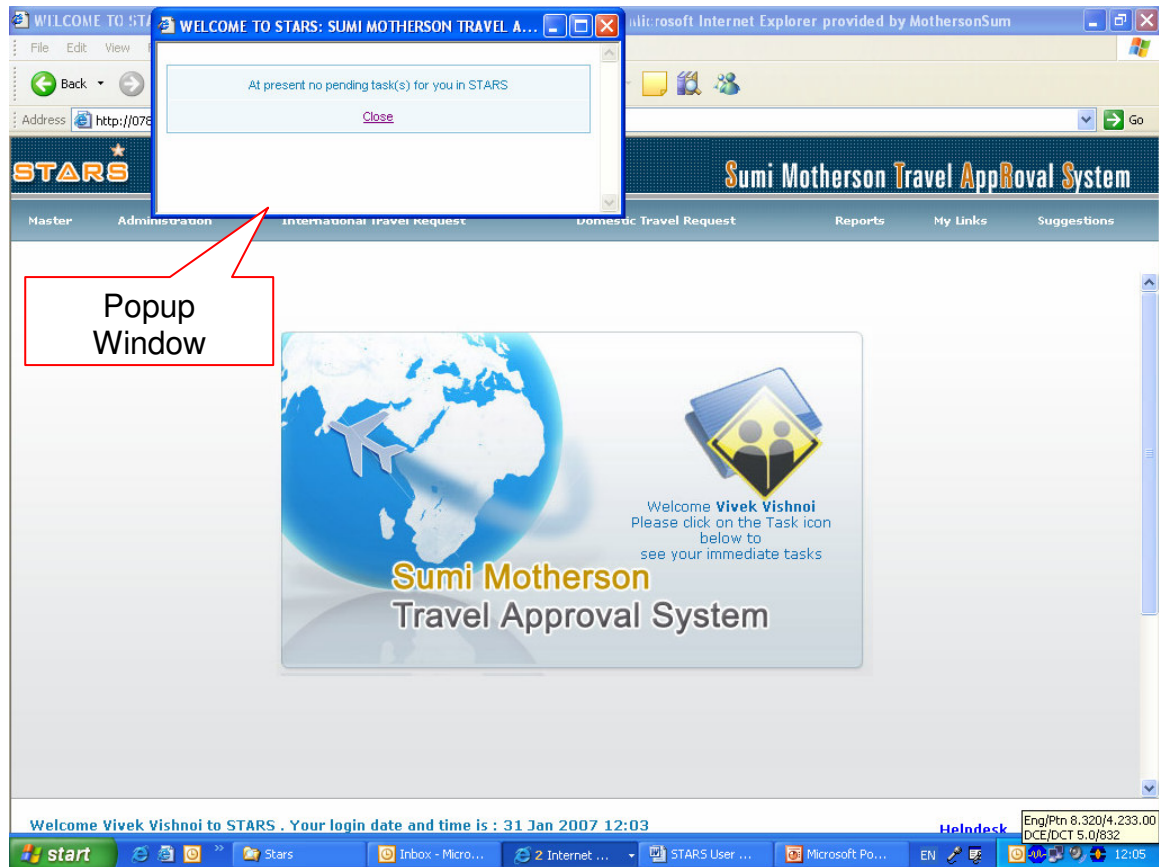
http://stars.mindeservices.com

Now, a screen shall appear as below:

(Snap–1)

After filling user name and password next screen shall appear as below:

(Snap–2)

A popup window will appear after login in STARS which indicates the pending tasks with the user. close this popup window by clicking on "close" button.

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How to add / delete / edit department?

After Login, click on "Master" option of STARS Main Menu, then click on "Department". A screen shall appear as below:

(Snap–3)

To add a department click on "New" option as shown in snap-3 then a screen shall appear as below:

Type the department

Click on "Add" to add the department

(Snap–4)

To add department, type Department name in available text box as shown in snap-4 and then press "Add" button. Like this, add as many departments as required. These added departments can be seen by clicking on "Department" option as shown in snap-3.

To edit department, click on "Edit" button in front of the particular record which needs to be edited as shown in snap-3.

To delete department, click on "Delete" button in front of the particular record which needs to be deleted as shown in snap-3.

How to add / delete / edit designation?

After Login, click on "Master" option of STARS Main Menu then click on "Designation". A screen shall appear as below:

(Snap–5)

To add a designation, click on "New" option as shown in snap-5 then a screen shall appear as below:

(Snap–6)

To add designation, type Designation Name & Designation Description in available text boxes as shown in snap-6 and then press "Add" button. Like this, add as many designations as required. These added designations can be seen by clicking on "Designation" option as shown in snap-5.

To edit designation, click on "Edit" button in front of the particular record which needs to be edited as shown in snap-5.

To delete designation, click on "Delete" button in front of the particular record which needs to be deleted as shown in snap-5.

How to create user?

Local Administrator shall create those key users by himself who would be required in Approver level & in defining the Work Flow. Remaining users shall register themselves by click on "New Registration" button on STARS first page and Local Administrator shall only do the verification of their records.

After Login, Local Administrator shall click on "Master" option of STARS Main Menu and then click on "User". A screen shall appear as below:

(Snap–7)

To add user, Local Administrator shall click on "New" button as shown in snap-7, by this, a screen shall appear as below:

(Snap–8)

On this screen, fields marked with an asterisk (*) are mandatory which are as follows:

1 – First Name
2 – Last Name
3 – User Name
4 – Email
5 – Password
6 – Confirm Password
7 – Unit
8 – Department
9 – Designation
10 – DOB

Tips for mandatory fields of this registration screen:

<u>First Name & Last Name:</u>

Local Administrator shall fill user's first name & last name as per the passport records. If user has middle name then it can be included along with the first name with a space.

<u>User Name:</u>

Local Administrator can define here the "User Id" of the concerned user as per his choice to use STARS. It is suggested to the user to memorize it and keep it confidential.

<u>Email:</u>

Local Administrator shall mention user email Id carefully here to receive all emails from STARS.

<u>Password:</u>

Local Administrator can define here user's "Password" as per his choice to access the STARS. This field is case sensitive with a minimum 8 alpha-numeric characters. It is suggested to the user to memorize it and keep it confidential.

<u>Confirm Password:</u>

This shall be exactly same as the above password.

<u>Unit:</u>

Local Administrator shall select user's "Unit" from the available list.

<u>Department:</u>

Local Administrator shall select user's "Department" from the available list.

<u>Designation:</u>

Local Administrator shall select user's "Designation" from the available list.

<u>DOB (Date of Birth):</u>

Local Administrator shall mention user's "Date of Birth" by using available calendar options.

Tips for non-mandatory fields of this Registration screen:

All the fields of registration screen except above mentioned mandatory fields are optional. However, it is suggested to the user to fill these records for complete availability of the user's data profile.

Select the Person you Report to:

Below this heading two radio buttons "Unit Id" & "Across the Unit" are provided. Local Administrator can select user's reporting person from the available list after clicking "Unit Id" radio button. If, user's reporting person is in another unit then he shall select his reporting person from the "Across the Unit" radio button.

Secret Question & Secret Answer:

Local Administrator can fill here a clue question & answer which will be asked by the system, if, user takes help from the system after forgetting his user id or password. It is suggested to the user to memorize it and keep it confidential.

Passport No. :

Local Administrator can fill user Passport No. here. In International requisition this is a mandatory requirement.

Date of Issue & Date of Expiry:

These date fields related to user's passport can be selected from available calendar option. These fields will be use by the STARS system in case of International requisition.

Place of Issue:

Local Administrator can write here the place name where user's passport had been issued.

Contact No.:

Local Administrator can mention user's contact no. here which will facilitate other persons in case of any enquiry or emergency.

Permanent Address:

Local Administrator shall write user's complete permanent address here for ready use of requisition transaction records.

After filling all the fields of this registration screen form, Local Administrator shall press "Register" button. This completes the Registration of the concerned user. Also, an auto generated mail from Local Administrator e-mail id shall go to the concerned user as an intimation of user's Registration in STARS.

After getting mail from Local Administrator, user shall change his password and update his profile after login in STARS by the available option "My Link".

How to edit user?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A screen shall appear as below:

(Snap-9)

To edit user record, Local Administrator shall click on "Edit" button in front of the particular user record which needs to be edited as shown in snap-9.

After clicking on "Edit" button a screen like snap-8 shall appear where records can be updated by the Local Administrator.

How to make user deactive?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A screen shall appear as below:

(Snap-10)

To make a user deactive, Local Administrator shall click on "Deactive" button in front of the particular user record which needs to be deactivated as shown in snap-10.

After clicking on "Deactive" button the concerned user record shall be transferred in "Deactivated User List" and after that the concerned user cannot access the STARS.

How to make user active?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A default "Activated User List" screen (Snap-10) appears. To make a deactivated user as an active user, Local Administrator shall click on "Deactivated" option as shown in snap-10. A screen shall appear as below:

(Snap-11)

To make the deactivated user active, Local Administrator shall click on "Active" button in front of that particular record which needs to be made active user as shown in snap-11. By this record shall be transferred in "Activated User List".

* Things to remember: All new user registrations by either Local Administrator or the User directly, the records appear in "Deactivated User List" by default. And these deactive user cannot access the STARS until Local Administrator make these records as active.

How to delete user?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A default "Activated User List" screen (Snap-10) appears. To delete user, Local Administrator shall click on "Deactivated" option as shown in snap-11 and then "Delete" button in front of that particular record which needs to be deleted. Then record shall disappear from the "Deactivated User List".

How to reset the password of user?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A default "Activated User List" screen (Snap-10) appears. To reset the password of the user, Local Administrator shall click on "Reset Password" option as shown in snap-9.

The user password shall be reset by the system and this information shall be send to the concerned user by an auto generated email.

How to upload the company travel entitlement policy?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A default "Activated User List" screen (Snap-10) appears. To upload company travel entitlement policy, Local Administrator shall click on "Upload Policy" option as shown in snap-10. By this a screen shall appear as below:

(Snap-12)

Local Administrator shall click on "Browse" button and locate the file in html format. Then click on "Upload" button with defining document reference in available test box.

This uploaded file shall help the users to view their entitlement while filling their travel requisition.

How to define the approver level to user?

After Login, Local Administrator shall click on "Master" option of STARS Main Menu then click "User". A default "Activated User List" screen (Snap-10) appears. To define the approver level of user, Local Administrator shall click on "Approver Level" button (Snap-10) in front of that particular user record which needs to be defined. After this, a screen appears as below:

(Snap-13)

Local Administrator shall click on available levels list to select the level for particular record and then click on "Submit" button to assign & save level to that particular user.

* Things to remember:

1- By default the level of every new registered user shall be "None".

2- Assign level "Global" to that user only who takes reporting from other units staff also the "Global" leveled user appears in all units.

3- In STARS system, requisition flows as below:

Originator / Creator→ Approval Level 1→ Approval Level 2→ Default Approvers

Example Only:

To simplify approval levels Local Administrator can assign "Approval Level 1" to Managers and "Approval Level 2" to HODs. Remaining user shall be in "None" level category.

Hence the travel requisition work flow for the unit shall now be like following:

Originator / Creator→ Manager→ HOD→ Default Approvers

4- Approver Level 1 & 2 separately or both, can be selected / left by the originator / creator at the time of travel requisition creation.

5- All type of requisitions is mandatory to go to default approvers (defined by Local Administrator).

How to define work flow – Domestic and International?

After Login, Local Administrator shall click on "Administration" option of STARS Main Menu then click "Work flow–Domestic and International" button. A screen shall appear as below:
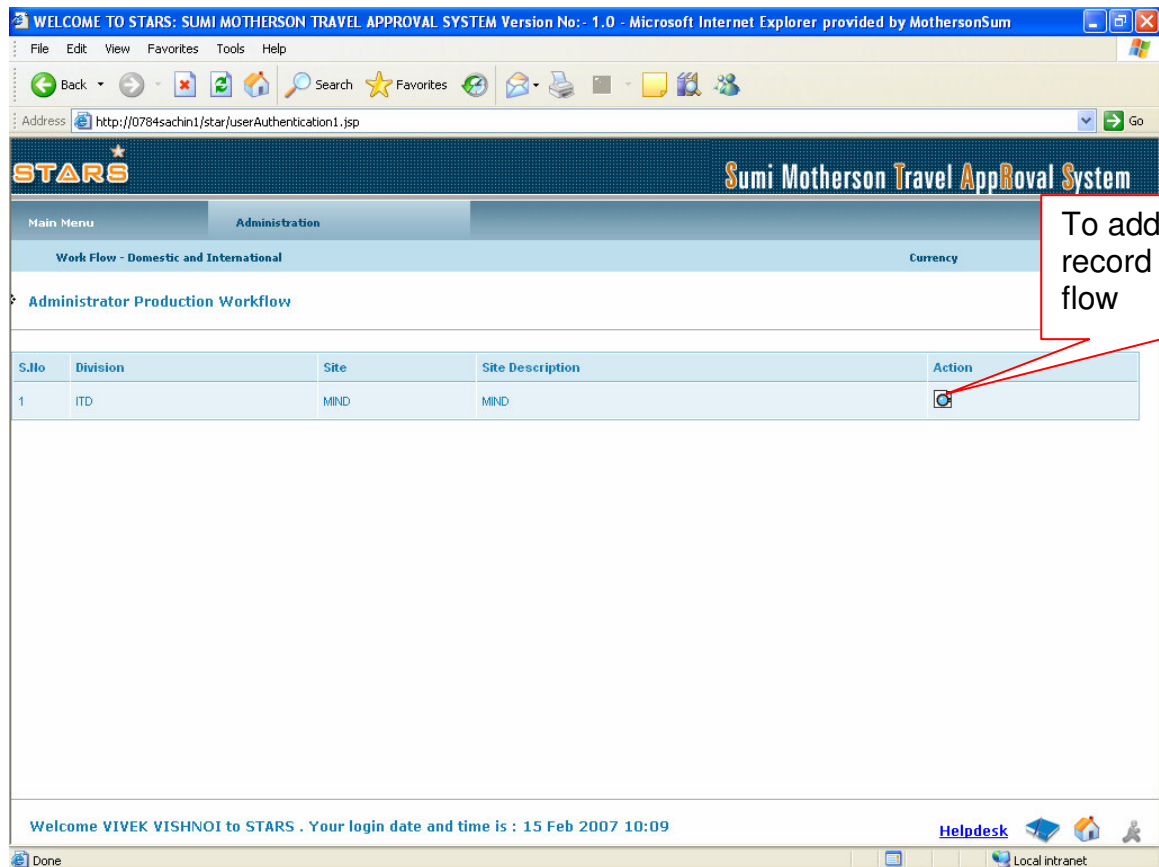
(Snap-14)

Local Administrator shall click on "Action" as shown in snap-14 to define the work flow. A new screen shall appear as below:

Callout labels on the image:
- To select the name
- To select the order of approval
- To select the travel type
- To delete the record
- To save the record

(Snap-15)

Local Administrator shall define this workflow very carefully as all types of travel requisitions shall go to all the persons defined in this work flow.

Steps to define the work flow:

1- Select the approver's name by click on "Approver's Name". The designation of the selected person shall appear in next block "Designation" automatically.
2- Select order of approver by click on "Order of Approver". These orders are 1 to 10 but Local Administrator shall define the levels from 1 to 8 only. Order of approval means the default work flow sequence through which the request shall come to approvers.
3- Select Travel type by clicking on "Travel Type" which contains the options 'International' and 'Domestic'. Local Administrator shall define this work flow one by one travel types for simplification.
4- After following above all steps (1 to 3), click on "Add" button to save the records. Saved record shall appear in workflow detail area on the screen.

Things to remember:

1- *In International workflow, Local Administrator shall define Mr. V. C. Sehgal (Group Chairman) on the 9th order of approval.*
2- *In International workflow, Local Administrator shall define Ms. Ruchika Pathak (MATA) on the 10th order of approval.*
3- *In Domestic workflow, Local Administrator shall Define Ms. Gita Laxmi (MATA) on the 10th order of approval.*